

**Harper Adams  
University**



**An appraisal of the growth of the beef sector in South America using recorded interviews with multiple past masters of The Worshipful Company of Butchers along with current interviews with senior leaders.**

**by**

**Morgan Metcalfe**

**Being a thesis submitted in partial fulfilment of the requirements for  
the MRes Degree in  
Food Industry Management**

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<b>Candidate's Number</b>	16013900
<b>Degree Programme</b>	MRes Food Industry Management
<b>Supervisor</b>	Mr Martin Anderson
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## **Abstract**

**Purpose:** The purpose of the research is to explore the growth of the beef sector within South America, exploring how the industry has risen to prominence along with consideration to its challenges; additionally, whether there are any potential transferable learning the UK beef industry could adopt.

**Methodology:** A qualitative research approach is carried out following a constructivist research philosophy, using archive material by The Worshipful Company of Butchers. A livery company that offers a unique centre-point to the meat industry who seek to enhance the company's commitment to charity, education and fellowship. The archive material included pre-recorded interviews with multiple past Masters of The Worshipful Company of Butchers; In addition to the pre-recorded interviews, interviews were carried out with industry professionals following the Delphi method.

**Findings:** Findings from the archive material include topics such as animal welfare, importing, training, management, hygiene, working conditions, general history, economics, consumer behaviour and travel. Limited information was discovered regarding South American beef industry. Interviews with senior leaders' touch upon environmental, social, economic, political, and technological issues relating to South American beef industry.

**Conclusion:** South America focuses on international trade specialisation within the beef industry. The region has developed naturally into specialising in producing beef due to the natural resources available to the countries. Education and biotechnology is suggested to be a potential transferable learning the UK beef industry could adopt.

**Originality:** Research has been carried out on the meat sector in relation to South America, however this research is limited. No previous appraisal of the rise of the beef sector in South America has been produced focusing on how they have risen to prominence along with exploring if there is any potential transferable learnings the UK beef industry could adopt. The longitudinal and cross sectional approach is unique, as is the archival material.

## CHAPTER ONE: INTRODUCTION

### 1.1 Research area

This thesis represents an appraisal undertaken in 2020, submitted in partial fulfilment of the requirements for the masters of research degree in Food Industry Management at Harper Adams University. The project is an appraisal of the beef industry within South America, exploring how the industry has risen to prominence along with the consideration to its challenges. This beef industry in South America is considered to be important, with it not only being a considerable income for the region, but also a basic source of food for the local population.

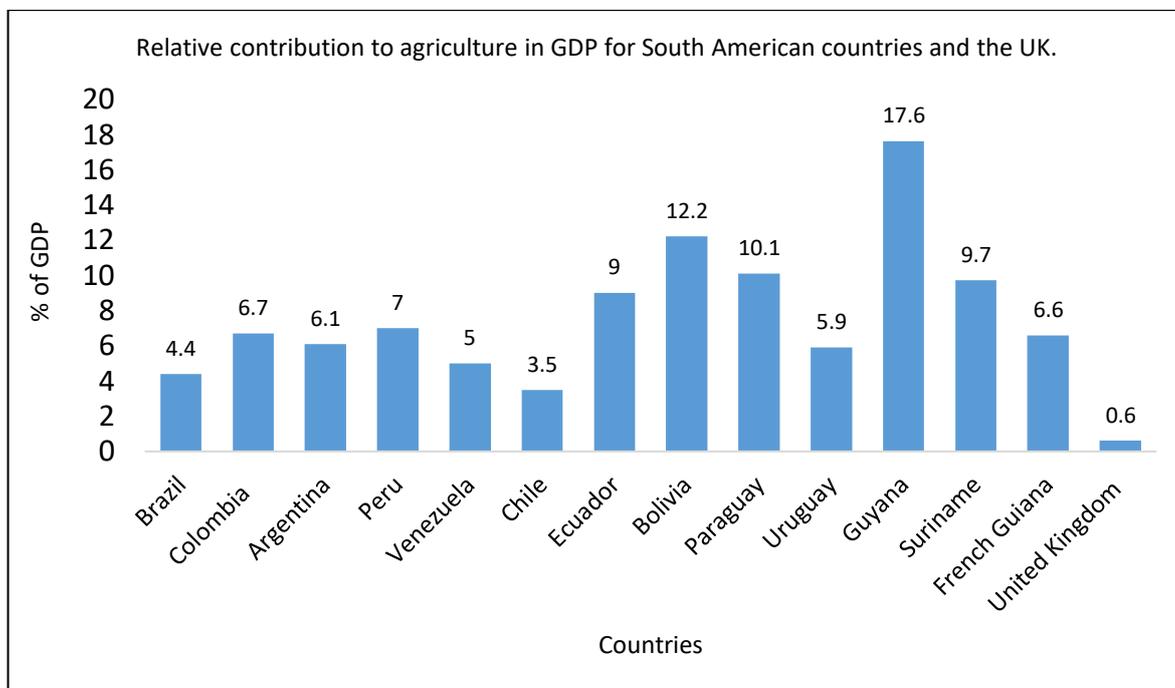
Pre-recorded interviews with multiple past Masters of The Worshipful Company of Butchers will be used. From the findings, research will be further built upon, through interviews with current industry experts working within the beef sector. The findings of the qualitative research will be analysed and thus presented in a systematic manner. The original purpose of the study was to understand the growth of the beef sector, focusing solely on Argentina; should limited information be found within the archive material, the focus will change to exploring the beef industry within South American countries.

The field of study is considered to be important, as the findings may benefit the UK beef industry in the context of what does the beef sector within South American countries do differently to the UK beef industry. Whether or not the findings will be directly relevant, valuable insights into the challenges, influencing factors and generally how beef is produced will be identified. Findings will be contextualised with the aim of hopefully the UK beef sector being able to perhaps adopt some of their practices, knowledge and methods to further develop the sector we currently have in the UK. The research explores how the beef industry has risen to prominence, additionally, the key factors influencing the sector.

The archive materials are pre-recorded interviews with multiple past Masters of The Worshipful Company of Butchers. The role of master may be considered as the most senior liveryman of the company during his or her term in office. The first interview was conducted in the year 1998, and the latest interview conducted in the year 2003. Interviewees were predominantly professionals within the meat industry, who were located across England. It felt useful to explore this material due to it being unique, with no one else having used the material. The content of the interviews is considered to be broad, where questions led the individuals to share their knowledge and experiences within their field of the meat industry, whether this was running a small butcher shop in a rural market town, to being the meat buyer of a major supermarket. Additionally, to bring further value to the research and build upon the archive material, interviews will be conducted with industry senior leaders currently working or have experience within the beef sector; thus ensuring recent knowledge and experiences were drawn upon. Interviews with industry experts are additionally set in place should limited knowledge be discovered within the archive material.

South America continues to have competitive advantage within the beef industry with many considering South America to be a specialist within with the beef industry (Rioja, 2019). With growing market access, growth herds and undervalued currency favouring exports, the current beef industry is thriving (Seo et al., 2010).

Statistics from the World Bank National accounts data, and the OECD National Accounts data (figure 1) files demonstrate the relative contribution to agriculture in GDP (Gross Domestic Product) for South American countries and the UK. It is evident from the figure below that the monetary value of all the finished goods and services produced in agriculture within the UK is relatively low at 0.6% GDP. Looking at countries within South America, the percentage of GDP is considerably higher, demonstrating the significance of agriculture contribution in GDP, along with the overall strength of the agricultural economy.



(Source: Adapted from The World Bank, 2021)

Figure 1: Figure demonstrating the relative contribution to agriculture in GDP for South American countries and the UK.

There are no studies that take an approach of looking at opinions over time from senior leaders of how South America became one of the largest beef producers globally; thus the purpose of this research is to understand the growth of the beef sector particularly focusing on the highest beef producing countries within South America, considering how they rose to prominence. A wide range of expert opinions from pre-recorded interviews that may contain pertinent information will be explored as well as interviewing current senior leaders within the sector.

The findings from this research will be considered important to those working within the beef industry in South America and the UK. The findings may inform the UK position within the beef sector as opinions and thoughts from experts will be contextualised which could fit into practice within the UK beef sector. The findings may not apply directly to the UK beef industry, however the opinions of experts within the industry will be aggregated to develop a set of rich findings exploring the knowledge within the industry and particularly exploring what can be learned from the set of findings.

The findings of the research will contribute to the body of knowledge, through sharing the thoughts and opinions of multiple past Masters of The Worshipful Company of Butchers and expert senior leaders within the beef industry. The findings will represent a voice and

a stance within the beef industry, where professionals, organisations and individuals can refer too, providing structure, accessibility and index to the archive material.

## **1.2 Research question**

The main aim of the study is to investigate the following question:

Understanding what factors were involved in South American countries rising to prominence within the beef industry, exploring what key knowledge can be learned from this and applied to the UK beef sector.

## **1.3 Research objectives**

Research project aims to achieve the following objectives:

1. To explore the contributing factors affecting the beef industry within South America.
2. Determine the challenges that have an effect on the beef industry in South America.
3. To explore the economic drivers within South American beef producing countries.
4. To understand how South America have risen to prominence over time.
5. To explore if there is any potential transferable learning the UK beef industry could adopt.

## CHAPTER TWO: LITERATURE REVIEW

### 2.1 Introduction

In the past, meat has been considered as a luxury that would only be consumed during special events or as a midweek treat (Ransom and Winders, 2019). Today meat is a staple in nearly every household kitchen and restaurant. Global meat production is considered an important part of the world economy, contributing to local, national and international trade (Toldrá, 2017). Global meat consumption and production has continued to rise steadily over the years, however, this increase in meat consumption per capita has not been spread evenly across the globe as Howard *et al.*, (2019) suggests in his book exploring the social and environmental consequences of the expanding meat industry.

Consumer demand for meat, particularly beef and pork, has received substantially greater attention than demand for any other food. Gallet (2010) produced a quantitative review of the price elasticity of meat, demonstrating the price elasticities of beef, lamb and fish to be the highest in absolute value, while the price elasticity of poultry is lowest in value. It is also mentioned that although the price elasticity of meat tends to be sensitive to a number of specification, estimation, and publication characteristics, data characteristics and the location of demand have noticeably less influence on price elasticity. Andreyeva *et al.*, (2010) supports these findings, expressing that economic shocks such as falling income in a recession or dramatic increases in energy or food prices can lead to changes in purchasing behaviour that are not necessarily predicted by elasticity calculated with data collected under normal market conditions.

Other factors such as gross domestic product growth, urbanisation and cultural factors play a role in per capita consumption rates across the world. Godfray *et al.*, (2018) demonstrates should households consume a lot, in return the sale of meat will rise, resulting in an increase in GDP, leading to a direct increase in GDP per capita. Additionally, Kearney (2010) explored food consumption trends and drivers, reporting a faster growth in GDP, expanding the overall size of the economy whilst strengthening fiscal costs.

The level of urbanisation is another factor influencing beef consumption per capita. Regmi and Dyck (2001) investigates the effects on global food demand, demonstrating that urbanisation can lead to structural changes in food consumption patterns due to many reasons. Firstly, individuals have different lifestyles, meaning the calorie requirement for rural and urban residents differ, resulting in individuals consuming different amounts to one another (Szabo, 2016). Secondly, food availability is an influencing factor, including the individual availability to purchase food, some individuals might be constrained in terms of the food they can consume (Vorley and Lançon, 2016). Lastly, urban areas tend to have much more economic opportunities, resulting in better income, meaning a change in one's diet and consumption (Warr, 2020).

Culture differences is an influencing factor that affects the food one consumes, thus leads to the difference in the habitual consumption of meat. Gossard and York (2003) explores social structural influences on meat consumption, demonstrating that certain cases it can lead to restrictions, such as the exclusion of meat from ones diet. Cultural influences are amenable to change, and when moving to a new country individuals often adopt particular food habits of the local culture (Henchion and Troy, 2014).

There has been increasing pressure on the agri-foods industry to meet the ever growing demand for high value animal protein (Kim *et al.*, 2019). The agricultural industry and the food industry are growing at an unprecedented rate, the driving factors considered to be behind this growth is the great combination of population growth, urbanisation and the general raising incomes. Today, meat is an accepted fact in the affluent lives of many individuals, although consumers tend to know very little regarding the extraordinary achievements that have occurred within the global meat industry to deliver quality meat on one's table; meat is now a staple in nearly every household kitchen and restaurant (Howard *et al.*, 2019). The supply of meat we experience is in sharp contrast to that of the days when man had to rely on the hunting of wild animals native to the area (Ritchie and Roser, 2017); the introduction of cattle, pigs and sheep from Europe and the British Isles to South America led one to the development of domesticated herds, resulting in a food supply chain that could be depended on.

It is predicted that beef trade will continue to grow over the next five years, supported by strong import demand (Clarke, 2021). Along with the beef trade growing, there will be a sense of uncertainty within the global beef industry, with numerous unfinished trade agreements that has been ongoing for years with some of these agreements having no deadline for resolution. Shahbandeh (2019) explored global beef and veal leading producing countries, demonstrating the leading producer for beef in 2019 was the United States, with production amounting to 12.73 million metric tons. Supporting Shahbandeh is Husted (2019) exploring the state of the global beef industry in 2019, demonstrating that consumption of beef is also high in the United States with them having the largest domestic consumption of beef. The U.S Department of Agriculture validates this in a report exploring food availability and consumption (U.S Department of Agriculture, 2019).

## **2.2 Rise of the Global Meat Industry**

A book from Howard *et al.*, (2019) looking at the social and environmental consequences of the expanding meat industry suggests that an increase in global feed grain production, a global shift towards market-orientated policies, and an increased corporate concentration have played a key role in expanding the global meat industry.

A study by Winders, on the global context of the US farm bill in 2018 regarding the world markets, instability and policy preferences in agriculture. It demonstrates how the rise of global feed grain production has increased significantly over the years, from 1990 to 2015. Winders (2020) records that corn production has doubled from 481 million metric tons to 967 million metric tons, while soybeans production has more than tripled from 104 million metric tons to 319 million metric tons. Additionally, Kim *et al.*, (2019) who looked at the global feed protein demand, particularly focusing on the challenges, opportunities and the strategies, states that the global expansion of feed grain production is supported by national policies that offer support. This support is normally in the form of farm income subsidies and also in the expansion of land which could be considered as a factor in allowing the global meat industry to further expand.

Advances in technology supported the expansion of world food grain production, for example, an article looking at corn history and culture demonstrates that during the year 1996, genetically modified soybean and corn became available (García-Lara and Serna-Saldivar, 2019). Most of today's soybeans produced are 94% genetically modified (U.S Food and Drug Administration, 2020), with most feed grain production being produced in North

and South America, with the United States and Brazil being the world's two largest producers and exporters in corn and soybeans. Both the United States and Brazil account for 80% of the world soybean export and 60% of the world corn exports. With the expansion of the feed grains production, it further allowed the global meat industry to expand.

Market orientated government policy may be a factor, It is suggested by Howard et al., (2019) that the creation of The World Trade Organization in 1995 along with the spread of regional free trade agreements from the 1990s onwards were typically at the heart of liberalisation and the expansion of international trade. This is highly relatable to the agriculture industry, Thow et al., (2018) supports this by exploring the specific trade concerns at the World Trade Organization, demonstrating that before The World Trade Organization being formed, countries traditionally protected their agricultural sectors from free trade. In addition to the free trade agreements being formed, communism fell in Eastern Europe and the Soviet Union, along with Chinese markets expanding (Thow et al., 2018). Due to communism declining, it resulted in new markets opening, these markets had previously been regulated extensively or even closed off to trading (Olimid et al., 2019). These changes in policies, agreements and additional changes meant greater trading was happening within the global meat industry, resulting in nations increasing their meat consumption. The expansion of free trade within agriculture has arguably facilitated the growth of the global meat industry.

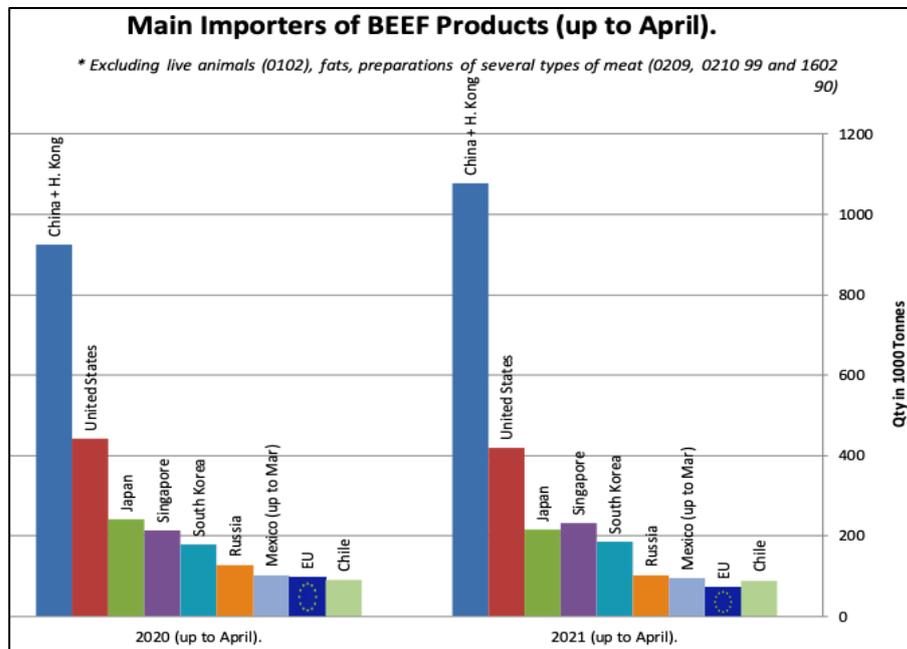
An increase in corporate concentration is suggested to have contributed to the global rise of the meat industry (Howard et al., 2019), with companies constantly growing, gaining larger shares of markets and merging with other companies. Supporting this statement is a literature by Winders (2019), which looked at the corporate concentration in global meat processing and the role of government subsidies. Winders' study proposed that the global meat industry became more concentrated in terms of meat, as a result of the increased market concentration it was accompanied by an expansion in the global reach of the corporations (Winders, 2019). While of course, other factors contributed, it is suggested that an increase in feed grains production, a shift toward more liberal trade policies and greater corporate concentration have been the main influencing factors contributing to the growth of the global meat industry.

## **2.3 South American Beef Industry**

Cattle production has a long history in South America; the beef industry is the third largest industry in South America by gross volume of production, behind soybeans and chicken meat. Beef exports from the largest four South American producers, Brazil, Argentina, Paraguay and Uruguay were sat at 1.4 million tonnes of beef exports during the year 2019, thus 18% higher than 2018 export levels (Meat & Livestock Australia, 2019). Joseph (2019) reports that the average price in Argentina for frozen beef export to China during the year 2019 was sat at \$5,364 per tons.

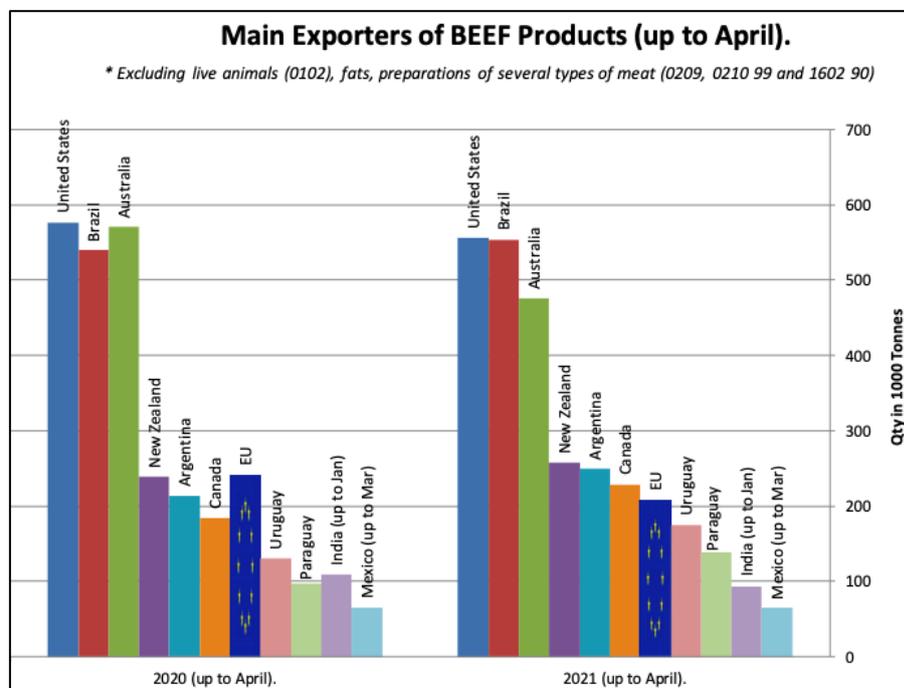
Both figures (figure 2 and 3) below are sourced from the European Commission, demonstrating the main importers and exporters of beef up to April 2020 and April 2021 focusing on global trade. The highest importer of beef was China and Hong Kong, followed by the United States. Looking at the exporters of beef, the United States, Brazil and Australia were the highest exporters, exporting between 500,000 and 600,000 tonnes in the year 2020. Within the figure, many countries within South America are listed as being the main beef exporters, countries such as Argentina, Uruguay and Paraguay. South

America's major exports in terms of value are typically primary commodities including foodstuffs and plant products, fuels and raw materials. Focusing on exports within the beef industry, South America has gained access to world markets, with Brazil becoming one of the biggest exporters of beef globally. Several other countries including Argentina, Uruguay and Paraguay also increased their beef exports over the years.



(Source: European Commission, 2021)

Figure 2: Figure demonstrating the main importers of beef products up to April 2020 and April 2021.



(Source: European Commission, 2021)

Figure 3: Figure demonstrating the main exporters of beef products up to April 2020 and April 2021.

It is evident from literature that South America is focusing on international trade specialisation within the beef industry through exchanging beef and beef products

between countries (European Commission, 2021; Meat & Livestock Australia, 2019; Joseph, 2019). Cohen (1990) demonstrate that the importance of international trade was recognized by political economists, Adam Smith and David Ricardo, which state that international trade was key to the rise of the global economy, supply and demand, and thus prices are both impacted by global events.

South America beef producing countries import and export their beef by using their own resources, such as technology, labour and capital (Martins and Price, 2004). Different countries are endowed with different assets and natural resources (Turner, 1963); resources vary from quality of land, landscape, the labour, working conditions etc. This therefore results in countries being able to produce product at a faster rate, and at a lower cost, meaning a country is able to sell that product cheaper than other countries (Ferrari and Scaramozzino, 2011). Should a country not be able to efficiently produce a product, they will import that product by trading with another country that can produce (Essaji, 2008); this is known as trade specialization within international trade.

Looking at the state of the Latin American meat industry Rioja (2019) found that other countries within South America contribute significantly to the production and the consumption of beef products. The article emphasises the scale of production that South America is currently producing is extremely large, thus fast growing nations with exceptionally large consumer markets such as China and Russia are constantly looking at the quality price ratio of South American beef products suggesting an increasing demand along with economic opportunity for South America beef producers and processors. Rioja (2019) demonstrates that strong opposition of countries in the UK see their beef production methods and systems threatened by extreme competitive pricing.

Meat & Livestock Australia support these concepts, expressing how China has gained precedence with the majority of imports pivoting away from Russia. Year to year, the beef imports to China currently sit at just under 500,000 tonnes, this accounts 35% of total exports of South America, where during the year 2014, this figure was 5%; this clearly demonstrates the growth of South American exports (Meat & Livestock Australia, 2019).

Examining the choice of livestock in South America across the climates and the projected climate changes, Seo *et al.*, (2010) suggests that farmers choose to farm livestock, mainly beef over crops. It is proposed to be down to the fact that one can adopt livestock more frequently when rainfall increases. The paper later expresses how important beef cattle are in the continents agriculture industry; and those international policy roundtables should consider the vulnerability of beef cattle in South America, as this could not only heavily influence beef trade, but also the global consumption of beef.

It is well documented that Argentina and Brazil have large cattle herds and plenty of pastoral land, however, beef production focuses mainly on supplying their large domestic markets (Rioja, 2019; Gunning, 2016; Dittmer, 2016). Rioja (2019) suggests that the beef industry in Argentina is further developed compared to Brazil, meaning that the exports are of higher quality in Argentina. Arelovich *et al.*, (2011) demonstrates that exports were restricted by government policies this meant that investment within the beef trade was very constrained. In a bid to recover lost ground the industry is aiming to increase production as a way of boosting the sector in production and exports (Rioja, 2019).

Uruguay and Paraguay's beef industries is proven to be smaller compared to Argentina and Brazil's industries, along with having a smaller population, resulting in a lower domestic consumption; because of this, their beef industry tends to be export orientated.

Demand is predicted to continuously grow over the next couple of years, with factors such as the Chinese New Year in January and African swine fever biting into protein supply (Lettini, 2019). Taking in the continuous strong global demand of beef along with the low value of the Argentine Peso in relation to the United States dollar, South American beef exports are expected to continuously grow steady over time.

## **2.4 South American beef producing countries**

Rioja (2019) explains the government's recent measures through refunds to expedite the sector's economic development have coincided with the increase in purchases from Russia and China, in addition to a slight rebound in the value of the local currency. Currently China has become the main buyer of meat from Argentina, importing 61,000 tons of meat in 2019 (United States Department of Agriculture, 2020). This figure represents a 102% increase over the previous year. The second largest purchaser of Argentine beef in terms of volume is Russia, which imported 13,600 tons — an increase for the first five months of the year of 433 percent (United States Department of Agriculture, 2020).

Meat & Livestock Australia (2019), explored the beef export growth for South America countries; expressing how the economic situation in Argentina is delicate and fragile with constant ongoing uncertainty regarding elections, especially after Mauricio Macri, the president of Argentina lost in elections in 2019. The article later reports that with high levels of inflation and the Argentine Peso at a historic low in 2019, the country was sitting at the brink of a financial crisis. Castillo-Ponce and S Lai in 2020, explores Argentina's currency crisis suggests that the low value of the Peso will always continue to make Argentina an attractive supply source for China, whereas higher levels of inflation will likely slow beef consumption levels (Castillo-Ponce and S Lai, 2020). Literature also reports that although Argentina have been granted access to the United States, the shipments there have been at a minimal due to the excessive demand from China, this demonstrates the growing dependence that Argentina have on China, which has accounted for 73% of Argentine beef exports in the year 2019 (Meat & Livestock Australia, 2019).

Colella and Ortega explores the retail channel choice and beef preferences in Argentina; the study states that Argentina is considered to be producers of high quality beef, being the fourth largest producer of beef globally (Colella and Ortega, 2017). The study explores how butcher shops and supermarkets play various roles in the supply chain of Argentina beef; with butcher shops demanding lower quantities meaning they accept beef cattle prices as they are unable to make direct contracts with cattle producers. The butcher shops would typically purchase whole or half carcasses through suppliers such as slaughterhouses, this means that the prices they typically pay are higher. Controversially, supermarkets demand high quantities of beef with consistent quality through the year, meaning they are able to negotiate commissions and prices directly with their suppliers (Colella and Ortega, 2017).

Literature from Rossini *et al.*, (2017) explores the Argentine government policies, particularly its impact on the beef trade; the research objective was to investigate the impacts of government policies on the beef sector. The research evaluates the effect of those measures over variables such as beef production, producer prices, beef exports,

consumer prices and domestic consumption. Argentina currently has the second highest beef consumption per capita in the world, with the average person consuming 54kg of beef, per year (Food and Agriculture Organization of the United Nations, 2017). Rossini *et al.*, (2017) continues to reports that prior to 2016 the Argentine government restricted beef exports using export taxes, and quantitative restrictions, this was in place to ensure that a reliable supply of affordable beef was always available for domestic consumption. Because of the government interventions within the trade, the risk of beef production as quantitative restrictions were unpredictable and applied at short notice, thus resulting in many beef producers leaving the industry (Rossini *et al.*, 2017).

Evaluating modern beef production in Brazil and Argentina, Steiger (2006) reports that Argentina's climate and its extensive pasture provide the country with a sense of advantage when it comes to beef production as the beef is traditionally grass fed. It is known for the herds in Argentina to be made up of breeds including the Angus and Hereford; these breeds perform extremely well within the climate and environment of the country. Literature from Modernel *et al.*, (2013) demonstrates production systems within the country to be characterized by low input, year-round grazing, this is studied further in the next chapter, and beef production systems used in Argentina is explored.

The United States department of agriculture (2020) reports that the export markets will have been influenced heavily by Covid-19 local demand, and the evolution of Argentina's beef cattle chain post pandemic. Having said this, Argentine government has responded to the Covid-19 by imposing some of the regions strictest measures on business operations and personal movement to slow the spread of the disease. It is predicted by the United States department of agriculture that if the purchasing power increased within their beef industry, a stronger domestic demand could raise beef prices and lower exports, although a weaker domestic demand would allow greater exports.

## **2.5 Beef Cattle Production Systems used throughout South America**

Two production systems are used in Argentina for producing livestock (Colella and Ortega, 2017). Bisang (2003) reports that the traditional system within the country consists of cattle grazing pastures over a large area of land, typically this land is not suitable for crops. Farmers using the traditional system tend not to produce high quantities of beef, and therefore farmers use many intermediaries to sell their products (Mathews and Vandever, 2007). It is suggested that profits from these farms are typically lower, with their final product ending up in local butcher shops dotted around the country (Colella and Ortega, 2017).

The second production system used to produce beef cattle throughout South America is the confined system; Modernel *et al.*, (2013) demonstrates the environmental impacts of beef production systems. This is a system which entails the livestock to be fed with energy concentrates (Colella and Ortega, 2017), meaning the beef cattle are reaching their desired commercial weight sooner, thus producing higher profits (Modernel *et al.*, 2013). The confined system, as suggested by the name uses less land, allowing one to make efficient use of further land they might have. Farmers following this production system typically handle large herds of cattle, meaning they are able to supply large quantities of beef, which therefore results in beef being available all year round, this is very attractive to supermarkets (Modernel *et al.*, 2013). Colella and Ortega, (2017) documents that beef that

are grass-fed are leaner and have a lower fat and cholesterol level compared to feed-lot beef.

## **2.6 Influential Factors affecting the South American beef industry**

Whilst producing this review of literature, influential factors have been highlighted, factors that are recorded to have had an effect on the South American beef industry, these factors may be historical and some present. The main influential factors are competition for land, the foot and mouth disease and weather implications, these factors are discussed below in the context of their effect on the industry.

### **2.6.1 Competition for land**

Competition for land in South America is mentioned within its literature, with a study from Rathmann *et al.*, (2010) looking at land use competition for production of food and liquid biofuels within South America and other regions. The study explains that competition for land have been documented for decades, with modern discussion shifting towards land for food production and land for biofuels production (Rathman *et al.*, 2010). Another study supporting this literature is a paper published by Smith *et al.*, (2010) reviewing the general competition for land. The paper identifies land being a driver affecting the food and farming industries. In addition to this, the paper reviews competition of land using a conceptual analysis framework, looking at the drivers and the pressures which cause competition; these factors include socio-economic and technology factors, social trends, natural causes and land transition (Smith *et al.*, 2010).

### **2.6.2 Foot and mouth Disease**

Disease outbreaks is identified as a risks the South American beef industry faces, these include diseases such as foot-and-mouth disease (FMD). This is a highly contagious viral disease of cattle and swine (Grubman and Baxt, 2004). Although this disease does not cause any threat to humans, any infected livestock legally cannot be sold and must be slaughtered in order to avoid the spread of the highly contagious disease (GroIntelligence, 2018). This is documented as a big milestone within the South America beef industry, with outbreaks of the disease being recorded in Argentina, Brazil and Uruguay (Bown and Hillman, 2017). The outbreaks resulted in export markets being closed, causing an increase in domestic beef supplies and a steep decline in beef trade prices. In 2007 Argentina was recorded to be FMD free (Gunning, 2016). It is worth noting from literature that although Southern Argentina is free from FMD, most of Argentine cattle herd is located towards the northern half of the country where herds are now regularly vaccinated against the disease.

### **2.6.3 Weather Implications**

Flooding is considered to be a factor that has been well documented within literature regarding South America, with Argentina being particularly vulnerable to natural disasters (Salazar *et al.*, 2015 and Berger *et al.*, 2017). Due to its large surface area and unique geography the country is prone to desertification, drought, landslides, earthquakes and most of all flooding. A review carried out by Salazar *et al.*, (2015) looks at the land use and the impacts on the regional climate of South America; the review documents flooding to be a regular occurrence in many parts of Argentina. In 2015 Argentina experienced the worst floods in five decades not only disrupting the lives of Argentina's citizens but also causing a huge threat to the agricultural industry, the economy and food supply within the country. Berger *et al.*, (2017) demonstrates how flooding influences and affects the livestock industry within South American countries; it reports how the extreme rain and

flooding in various regions with high production acreage have affected pasture conditions thus having an effect on agricultural operations. The findings of Berger *et al.*, (2017) support the findings of Salazar *et al.*, (2015).

## **2.7 Economic drivers within the beef industry**

Understanding the main influential factors affecting the beef sector led one to consider the economic drivers within the industry; whether these factors influence and shape the way beef cattle are produced within South America. Livestock is still considered to be the largest industry that uses the most land globally; however Harrison *et al* (2002), exploring world agriculture considering the current economic drivers as well as looking towards the future. The way one utilizes the land has changed over the years, which result in a change within the economic drivers within agriculture. A paper by Taheripour *et al.*, (2013) looks at the livestock industry in transition, giving consideration to the economic drivers, the paper suggest that until a few decades ago the crop sector was allocating a large portion of its cropland to feed crops such as forages, silage, hay and oats etc. Over recent years this has changed significantly, with pasture land being utilized for beef cattle production to meet the increasing demand. Livestock production today is using much less land than in the past, this is expected to continue in the future (Taheripour *et al.*, 2013).

Another publication by the American Agriculture Economics Association written by Lawrence *et al.*, (2008) explores the feed grains and livestock, looking at the meat supplies and prices. The literature reports that higher feed prices are negative to livestock producers, resulting in increased production costs. Supporting this statement is Becker (2008), demonstrating that livestock producers have no option but to absorb these higher feed costs in the form of financial losses. Over time, those financial losses result in liquidation and reduced production.

As soon as a significant volume of livestock production is cut, retail prices rise, meaning consumers naturally cut back on the volume of meat purchases (Taheripour *et al.*, 2013). However, higher prices plus additional demand due to the population continuously growing means encourages livestock producers to expand their supply over time. In addition, a book published by Steinfeld *et al.*, (2013) exploring the change in livestock and landscape, looking at the drivers, consequences and responses reports on the changes in global economics. It is reported that due the constant rapid changes in global economic conditions, along with evolution in land use, they are considered to be the two key factors in shaping trends in consumption of livestock and the way one produces livestock. For example; central Argentina and the domestic availability of cheap feed has led to a shift towards grain-fed beef in Argentina. This was supported by the Argentine Government with direct subsidy payments for feedlot owners between the years 2007 and 2010 (Rioja, 2019). This resulted in less beef being produced using an all year-round grazing system, to beef being produced and finished in feedlots. It is suggested by research that similar to wheat, the beef industry within Argentina is recovering after many years of high tariff restricted growth. This demonstrates how the change in economics and the evolution of land influences the way one produces beef.

The economic state of agriculture in Argentina is in good shape, this is demonstrated by rising beef exports and agricultural investments (Regúnaga and Rodriguez, 2015). The paper suggests that farmers within Argentina are investing more into one's operations at a time of political reform. Exports of farming equipment such as tractors, planters and seeders to Argentina are demonstrated to be on the rise (Jaurena and Boveri, 2020), thus

suggesting further production and development within the agricultural sector of Argentina. In addition to the suggested increase in production, corn and soybeans, two of the country top crops have also been demonstrated to be on the rise since 2018 (Neiman and Blanco, 2020). Both the corn and soybeans sector were not effected as much as the beef industry by the kirchner policies. It is suggested that the demand globally for soybean meal and oil kept the market exports competitive, research suggests that the trend of soybean meal and oil could be a sign of improved sector growth in the future to come (Jaurena and Boveri, 2020). Key drivers for economic growth within South America beef industry is highlighted below, these are factors that have been mentioned within literature linked to economic growth within livestock producers, particularly beef.

### **2.7.1 Markets for agricultural products**

As food marketing companies have grown and adapted to new technologies, the agriculture industries have followed, thus creating economies of size within processing and distribution. Literature from Halloran and Archer (2008) evaluate how economic factors influence and shape agriculture with respect to farming practices, structural issues and the type of production systems used. The paper demonstrates how agriculture plays a fundamental role in the world economy, producing food, income and employment to rural populations. The paper later mentions how important the markets for agricultural products are, with these markets typically being the routes for economic growth and development. Supporting this discussion, Alston and Pardey, (2014), evaluating where agriculture fits in global economy express that patterns of livestock production reflect population patterns within countries, suggesting that the location of where the livestock is produced can either be of benefit or disadvantage to the producer. This is therefore considered to be a factor in gaining or developing economic growth.

### **2.7.2 Technological drivers**

The number of farms globally have fallen, however research from Newell (2009) who explored the political economy of agricultural biotechnology within Argentina demonstrate the average farm size to have increased 67%. It is assumed that this has typically occurred as famers within the industry, particularly South American farmers have specialised. Dimitri *et al.*, (2005) looks at the transformation of agriculture and farm policy within America; suggesting that while farmers in the past used to focus and produce numerous commodities, it is now normal to see farms producing only one commodity. This is arguably down to the technological drivers with agriculture.

Other technological advances that have contributed towards elements of economics within agriculture are improved breeding and genetics, allowing one to increase the productivity of both plants and animals (Newell, 2009). Controversially, while improved breeding and genetics are suitable for both small and large scale farmers, many other economic drivers were favoured by larger operations, for example, tractors, harvest equipment and other farmland equipment require minimum usage. This could be either acres or number of hours all in order to achieve optimum efficiency; this therefore suggests as usage increases, the cost per unit of producers decrease over a wide range of outputs resulting in economic advantage.

Exploring economies of scale and outsourcing of agricultural labour in the Pampa region of Argentina is Lombardo and Marra (2018); much of the new technology available to the industry is focused towards production and harvesting of crops, hence the adoption of new technology along with what these technologies are designed to do creates incentives for

farms to be more specialized rather than diversifying into producing other commodities. Although, this being said, research from Paul *et al.*, (2004) argues that larger operations can reduce the costs of production if producing two or more products jointly rather than just focusing on one commodity. It is also observed in literature that smaller farms tend to compensate for the lack of economies of size by seeking off farm employment as part time work; this is then linked with greater use of technologies that reduce on-farm management time (Fernandez-Cornejo *et al.*, 2007).

### **2.7.3 Animal health**

Another factor contributing to the growth of the economy within agriculture is animal health; Kelling *et al.*, (2000) reports that healthy livestock are much more profitable and that high quality animal health is a vital component of animal welfare. Factors such as parasitic infections, diseases and metabolic disorders reduce animal production and profitability, thus affecting the economy. Research from Kelling *et al.*, (2000) suggests that implementing a herd specific health programme is the best method of addressing any potential health problems; the study looks at management strategies for effective beef and dairy herds. The paper later reports that for one to gain optimum profitability a herd specific health programme should be implemented along with a veterinarian being consulted with regards to specific animal health problems and farm bio-security.

An article published by McLeod *et al.*, (2016) under the Food and Agriculture Organization discusses the economic analysis of animal diseases. The article highlights how important animal health is, and how it can be utilized to drive economic growth. McLeod *et al.*, (2016) later discusses that animal health impacts livestock production through direct costs and indirect costs such as prevention and control methods; economic rationale, economic drivers and incentives play an important role in decision making process on the implementation of animal health intervention.

## **2.8 Future of beef trade in South America**

Argentina is suggested to have the potential to re-emerge as a major beef exporter, although, controversially, the competition from other south American countries could make it difficult for Argentina to increase their share of the global markets (Deblitz and Ostrowski, 2004). Looking towards the future, agriculture in Argentina is looking strong within an era of free market reforms (Jaurena and Boveri, 2020). Past protectionist policies and high tariff exports have certainly affected the agricultural economy for almost two decades, killing both domestic farmers and global trade relation similar. Within this the beef trade has suffered from the steep export tariffs, the FMD and the extreme weather that has led to affected pasture conditions and in some areas the herd sizes (Fischer and Bilenca, 2020). New reforms within the industry are supporting farmers to invest further into ones operations, and rising domestic and global demand for meat will surely aid the growth of Argentine beef industry production and exports.

## **2.9 Concluding remarks**

The production of meat and the consumption of meat is influenced by a host of factors that will always continue to affect the way one produces meat. It is evident from the literature evaluated, that global meat trends do not reverse quickly and tend to stay around for long periods of time, thus is considered important to understand recent trends and drivers within the global meat industry.

Beef production has experienced a major shift forward in terms of intensification, with today's production across South America using much less land than in the past. The many factors and changes mentioned during this review of literature reflects a continuation of historic trends, however, all in all, these factors and changes within the industry amount to significant changes within global beef production. The literature reviewed suggests that South America beef producing countries focus heavily on international trade specialization, relying on their own resources, such as climate, environment, land and labour costs to produce beef to export to other countries that are unable to produce beef for various reasons. Within the review a number of influential factors affecting the industry have been drawn upon, such as competition for land, weather implications, diseases, economic drivers and technological drivers.

To conclude, the future of the beef industry within South America continues to be strong, although it can be said, it might be hard for countries to increase their production due to strong competition with fellow countries within South America. Export of beef and beef products within the continent is suggested to continue being strong due to many South American countries focusing heavily on international trade specialization of beef.

## **CHAPTER THREE: METHODOLOGY**

### **3.1 Research Aim**

The aim of this research is to consider what factors were involved in South America beef sector rising to prominence, along with the challenges that have directly affected the industry. In addition to this, the research will aim to explore whether there is any potential transferable learnings that the UK beef sector could potentially adopt.

Research project aims to achieve the following objectives:

1. To explore the contributing factors affecting the beef industry within South America.
2. Determine the challenges that have an effect on the beef industry in South America.
3. To explore the economic drivers within South American beef producing countries.
4. To understand how South America have risen to prominence over time.
5. To explore if there is any potential transferable learnings the UK beef industry could adopt.

### **3.2 Philosophical approach**

The author of the research believes that science is the way to determine the truth, however, knowledge, theories and values are personal to each individual, meaning knowledge is therefore constructed through interaction with others (Clark, 1998). Following this, a constructivist view is applied, meaning that each individual constructs our own view of the world based on our perceptions (Mills *et al.*, 2006). Due to our observations and perceptions capable of being incorrect, ones constructions must be imperfect or incomplete. This further led the researcher to focus on social constructivist; a theory of knowledge according to which human development is socially situated and that knowledge is constructed through interaction with others (Rust *et al.*, 2005; Crossan, 2003).

As drawn up in the first chapter, the literature review, previous studies within this field of research tends to be highly descriptive, following deductive approaches, using qualitative and quantitative methods. These approaches in previous studies tend to produce fairly reliable and expected results, demonstrating and highlighting the factors directly impacting the sector. A large proportion of current studies touched upon during the literature review tend to depend on quantifiable observations that lead the research to statistical analysis.

Whilst solely focusing on this research, and the proposed objectives; the researcher believes that producing a social study is the most suitable method of completing the objectives, relying on one's interpretation and qualitative data. Social science allows one to examine the relationships between individuals and societies, along with the development and operation of societies (Winch, 1990), as opposed to studying the physical world.

### **3.3 Methodological approach**

Due to the researcher wanting to understand and reflect on participants point of view whilst ensuring the findings are grounded in ones experiences a longitudinal and cross sectional approach was applied. This approach would provide the research with rich, comprehensive data that will strengthen the rigor and enrich the analysis of findings (Morse, 2016). Through following a social constructivist philosophy, employing a longitudinal and cross sectional approach mirrors' the way individuals naturally collect

information, therefore following this approach deemed suitable in relation to the philosophical approach and the research question (Creswell, 1999). Through ensuring the methodological approach that best suits the research question along with its objectives, more meaningful findings will be gathered, providing the study with rich in depth findings (Axinn and Pearce, 2006).

Archival research will be used within the methods; this relies on exploring past data, looking for interesting patterns or relationships. The funders of the research thought that it was an useful material to look at and as it is a resource not being looked at in the past.

Moore *et al.*, (2016) demonstrate that archival research can be important as it provides one with evidence of activities and tells us more regarding individuals and various institutions, along with the fact that archival material are not usually created for historical research purposes meaning they often provide less biased accounts of events than secondary sources. Additionally, McKee and Porter (2012) state that using archival material minimizes the response of biases of subjects as the researcher is not present whilst data had been collected. Ventresca and Mohr (2017) state that archival material is plentiful and has already been collected, meaning it is considered to be a useful method in supporting and adding value to one's research. Lastly it is effective in helping one confirm that the results and experiences derived from archival material reflects the real-world, and not just exist in artificial or simplistic settings (McKee and Porter, 2012).

In addition to all the commonly known research approaches, such as grounded theory and phenomenology etc, the Delphi method is an approach that will be applied to thus research due to the author wishing to speak to senior leaders within the industry. Created in the 1950's by researchers for use in policy making, organizational decision making and to inform direct practices; it is a method regularly utilized in social science mixed method research (Linstone and Turoff, 1975). The method relies on a group of experts' collective thoughts and opinions which is a key tenet of social constructivism. The Delphi method is based on the responses of a group of experts, and is considered to be a process used to gather knowledge and insight from a group of diverse experts within a certain field (Gordon, 1994). Justification of using the Delphi method is as follows; due to limited information found within the archive material, it led the author wanting to talk to senior leaders currently working within the industry, which is what the Delphi method focuses on (1). The sample involved are predominantly very busy professionals who needed flexibility in order to participate in the research (2). It is considered to be a research method for learning as much as possible from highly experienced professionals in the least amount of time (3). Participants involved in the research are very much spread out geographically, therefore it would be impossible to meet face to face, especially during the COVID-19 pandemic (4). Lastly, the Delphi method is not concerned with having a generalizable sample, but instead seeks input from a purposive sample of individuals with specific expertise on a specific topic (5). Literature drawn upon during the first chapter, the literature review followed a similar approach of questioning experts within a topic area; Dittmer (2016), explored the sales of meat and poultry in South America, questioning senior individuals on the topic. Additionally, Guevara and Gronwaldt (2012) explored the status of beef cattle production in Argentina over the last decade, including its prospects using the opinions and thoughts of leading specialists within the industry located in South America.

### **3.3.1 Archive Material**

The Worshipful Company of Butchers are the funders of the researchers master's degree; it was suggested that archival research material should be looked at. This material included a series of pre-recorded interviews conducted with past masters of the livery company; the series of interviews are all stored on CD's and are owned by The British Library. A desire by The Worshipful Company of Butchers was to look at this material as it was felt that this was an untapped resource that may offer some insight into the principle aim and objectives of the question. The archive material was examined through listening to all of the material, whilst coding it. The material was thought to be useful as The Worshipful Company of Butchers are effectively the thought leaders of the meat industry in the UK for over 20 years.

The series of pre-recorded interviews conducted with past masters of the livery company were all involved and working within the professional UK meat industry, suggesting that the group of interviewees were all within a socially constructed paradigm (Kim, 2014), which follow similar values, beliefs, thoughts and expectations around the UK meat industry which may have thoughts and opinions regarding South America meat industry (Hammack, 2005).

The archival material includes interviews with 23 professionals within the meat industry with years of expertise and knowledge. The material contained 163 hours of recorded interviews, with each interviewee having approximately 7 hours of material each. The first interview was conducted in the year 1998, and the latest interview was conducted during the year of 2003. Below is a table stating the interviewees names, along with the dates recorded relating to the archive material, see appendix 1 for a full complete abridged version.

*Table 1: Table presenting archive material information, including names, dates and reference codes.*

<b>Interviewees</b>	<b>CD code</b>	<b>Date of Interview</b>
Tom Hixon	C821/09	December 1998
Ken Clements	C821/12	December 1998
Vic Johnson	C821/13	January 1999
Eric Chambers	CB821/11	January 1999
Terence Bonser	C821/14	February 1999
George Adams	C821/17	February 1999
Trevor Herbert	C821/19	March 1999
John Breeding	C821/16	March 1999
Laurie & Rorie Duff	C821/15	April 1999
Bob Dixon	C821/22	May 1999
Brain Hewitt	C821/20	May 1999
Fred Mallion	C821/ 21	June 1999
Ron Stedman	C821/16	September 1999
Colin Cullimore	C821/41	December 1999
Geoff Nicholson	C821/25	December 1999
Patricia Dart	C821/23	December 1999
Michael Katz	C821/70	July 2001
David Swain	C821/91	April 2002
Christopher Gill	C821/101	May 2002
Richard Salder	C821/87	May 2002
David Walker	C821/89	June 2002
Roger Baker	C821	October 2002
Colin Jay	CB821/104	December 2003

The pre-recorded interviews were used to establish whether there were any pertinent points. In order for sections of pre-recorded interviews to be considered as relevant to the research question, it should fit into the following criteria, (1) any reference to South America during the interview, (2) the individual having travelled to South America on vacation, (3) the Interviewee referring to South America as an example, and lastly (4) the interviewee making reference to businesses importing or exporting to South America countries. In addition to the criteria highlighted above, key words were used to determine whether the material was relevant. Any part of the archive material that would contain one or more of the key words highlighted below would be considered as a pertinent point.

- South America
- Beef Industry
- Argentina
- Brazil
- Uruguay
- South America exports

All of the archival material was transcribed manually using Microsoft Word, version 16.34, the archive material was all stored on CD's, these were streamed using a CD player, and transcribed using Microsoft Word, in which a document was created for each interviewee. The archival material accumulated to 163 hours of material. Following this stage of the research, any interviews containing information that is considered to be relevant to the research question or fit into the criteria was interpreted and coded.

### **3.3.2 Interview method**

Due to limited information being discovered within the archive material, it led the author wanting to speak to senior leaders within the beef industry, located in South America and additionally the UK. Interviewing current senior leaders would strengthen the research project, answering ones research objectives. Interviews was chosen as a method of data collection, using the Delphi method; interviews allows one to be present with the participant, expand on any questions should the participant need further guidance, as well as being able to judge body language and non-verbal responses (Rowley, 2012). Having said this, judging body language will be more difficult due to all interviews being conducted over Microsoft Teams and Zoom. In addition to this, Briggs (1986) observe oral responses to contain much more information as compared to ones written response.

A semi-structured interview approach was chosen to conduct the interviews; Dearnley (2005) observe that a semi-structured interview is an approach that relies on a pre conceived interview structure, where the same set of questions are asked in all interviews, which maintains data quality and allows one to compare data. However, more crucially, Young *et al.*, (2018) demonstrates that semi-structured interview approach allows the conductor to ask additional questions should a new line of enquiry develop during the interview. Schmidt (2004) explored the analysis of semi-structured interviews, demonstrating that the approach allows one to understand the topic in new light, whilst empowering the interviewee to take the questions to another direction should they feel it to be necessary. Additionally, Evans and Lewis (2018) report that semi-structured interviews can be tailored to ones experiences and skillset, meaning a set of standard questions can be asked along with a few tailored questions; this ensures the researcher gains as much data as possible from each participant. Due to the element of flexibility

following a semi-structured interview it appeared to be the most suitable to gain data on such a broad topic where some elements appear to be complex. The interview questions were piloted with Harper Adams University staff, the pilot questions can be seen in appendix 2. Changes to the pilot questions included amendments such as extending the questions. Piloting ensures consistency within the data collected, all interviews were carried out by the same individual.

Prior to each interview, participants are provided with information forms, including a guide to the interview questions and their consent to participate in the research, these forms can be seen in appendix 3. All responses during the interviews will remain as anonymous. Due to the Covid-19 pandemic all interviews are conducted over Microsoft Teams.

Interviews as a method of collecting the required data was chosen as the researcher wanted to be able to probe deeper into ones response which would not work should a survey or perhaps a focus group approach was used. Using interviews as a method, one could cover all basis whilst gaining diverse viewpoints. Interviews as a method allowed the researcher to reflect and evaluate between various interviews, meaning questions could be altered before the next interview, and additionally the researcher could probe deeper into ones response to the questions asked. Interviews was chosen over other qualitative research methods due to the method being interactive and practical, which reflects the researchers philosophical stance, social constructivism. It is a research method that relies on the researcher exploring and reflecting on responses before evaluating the data.

### **3.3.3 Justification of questions**

Table 2 demonstrates the questions asked including the justification behind these questions. All questions asked during the interview were in relation to the research question and research objectives. Due to the interviews following a semi-structured approach, additional questions were asked depending on the response given, these can be seen in the interview transcripts, appendix 5.

Research project aims to achieve the following objectives:

1. To explore the contributing factors affecting the beef industry within South America.
2. Determine the challenges that have an effect on the beef industry in South America.
3. To explore the economic drivers within South American beef producing countries.
4. To understand how South America have risen to prominence over time.
5. To explore if there is any potential transferable learnings the UK beef industry could adopt.

*Table 2: Table demonstrating the interview questions along with a justification.*

Question	Justification/Reference	Linked to objective
Please introduce yourself, your background, your industry etc.	To gain insight into the background of the interviewee.	N/A
Tell me about your interest with South America meat industry, what experiences have you had within the industry?	What connections does the interviewee have with South America meat industry, how does the industry relate to the individual. The response to this question will support the interviewer in understanding their view point in regards to the following questions asked.	N/A
How do you think South America have risen to prominence? What at the fundamental factors that have contributed to this, is there any political, or economical type factors that have influenced the sector?	To gain themes and categories of some of the factors that contribute to the rising sales of South America beef along with the current state of the South American beef industry as per Ivan Riojca-Scott (2019).	1, 4, 5
What contributes to the sales and growth of South America meat sales? Are there any trends you recognize?	To indicate the individuals thoughts on some of the factors that contribute the growth and sales of South American meat along with any occurring trends and patterns within the sector as per to Arelovich <i>et al.</i> , (2011) and Henchion <i>et al.</i> , (2014).	4, 5
What is different about South America's beef production when compared to the UK beef production?	To determine what South America do differently to UK beef production.	5,
Is there anything that the UK beef industry could learn from South America's practices? In particular, what can the UK beef producers and processors learn from South America?	To explore if the UK beef industry could take anything from their practices.	5,
In your opinion, what do you think the challenges are for the South America beef industry?	To determine whether professionals within the beef industry see various challenges which are not clearly highlighted (Arelovich <i>et al.</i> , 2011 and Guevara and Gronwaldt, 2012).	2,
Are the markets different for South American beef? How does the market for	To gain an insight if the way South America is producing beef are different because their markets differ to the UK beef markets.	1, 4

agricultural products differ to the UK?		
How do you see the future beef trade of South America, what will it look like?	To indicate how one perceives the future of South America beef production as per Gunning-Trant (2016).	3, 5
What Is there to learn from South America beef producers?	Can anything be put into practice within the UK beef industry, would we benefit from something.	5,

### 3.4 Sampling

A purposive sampling method was employed, with participants selected for a purpose to apply their knowledge or expertise to a certain problem within the confines of the area to be investigated (Emmel, 2013; Marshall, 1996). In order to ensure validity of the final sample, participants will reflect a diverse range of individuals, representing various geographic regions within South America and the UK (Noy, 2008). In addition to the purposive sample, a snowball sampling approach will be used to recruit additional participants for interviews, as interviewees suggested further appropriate contacts. All interviewees, whether recruited through the purposive sample or the snowball sample will fit into one or more of this criteria. Six interviewees were recruited through a purposive sample, and a further seven interviewees were recruited using a snowball sampling approach.

Interviewees will fit into one or more of the sampling criteria below:

1. Currently involved, or have been involved in the beef industry in the UK or South America, in order to determine if there is transferable learnings the UK beef industry could adopt.
2. Experts within the beef industry, or have worked in senior roles within the industry, as per Dittmer (2016) exploring sales of meat in South America.
3. Proportion of the interviewees to be located in South America countries as per other authors producing papers on similar topics geographically (Dittmer, 2016 and Gunning-Trant, 2016).

*Table 3: Table highlighting interviewee profile, including location and career.*

Interviewee	Location	Career
1	England	Livery and court member of The Worshipful Company of Butchers and an Honorary Professor in Agricultural Economics at Harper Adams University.
2	England	Senior lecturer at Harper Adams University, lecturing food marketing and sustainability. Previously worked for the Foreign Office in Brazil and had the title of the beef officer.
3	Brazil	A federal agricultural tax auditor based in Brazil, running a family beef farm.
4	Argentina	Professor in agri-business at the University of Villa Mercedes. Additionally, a researcher at the University of Buenos Aires and experience in

		working on different agricultural consultancy projects.
5	France	Previously worked in the Meat and Livestock Commission, currently based in France.
6	Brazil	Director of a sugar and alcohol company, previous experience in managing beef farms based in Brazil. Additional experience in beef genetics.
7	England	President of the International Meat Trades Association, and due to become the Master of The Worshipful Company of Butchers.
8	England	A professor at Harper Adams University working within the senior management team, a professor that has an expertise in sustainable livestock systems.
9	England	Technical operations director at one of Europe's leading food companies.
10	Argentina	Currently a regional director for The Global Roundtable for Sustainable beef, based in Argentina.
11	Uruguay	Principle senior researcher based in Uruguay, additionally a consultant for agricultural companies.
12	Brazil	Managing JBS, the world's largest meat company, based in Brazil.
13	Brazil	Managing Creative Foods Europe/OSI. Previously worked in another senior role for JBS.

### 3.5 Validity and Reliability

Prior to conducting final interview with selected sample, the interview questions and structure was piloted with two individuals currently working within the industry and Harper Adams University staff. Reasoning behind piloting the interview structure and questions was to ensure that the questions were designed in a way that would typically gain the desired information, that the participants understood what was being asked and that the questions were in line with the research objectives. Majid *et al.*, (2017) expressed that piloting interviews should be considered as an integral aspect in the process of conducting qualitative research as it highlights improvisation of the research whilst exploring interviews in qualitative research. Additionally, piloting the interviews allows one to amend the structure and the style of questions to specifically gain the most suitable approach of gaining the desired data (Young *et al.*, 2018).

### 3.6 Coding

As Basit (2003) explain, data analysis is the most crucial aspect within social science and demonstrates coding to be considered a crucial step during analysis in order to organise and make sense of textual data. Coding involves subdividing data as well as additionally assigning categories; these typically tags or labels for allocating units of meaning to descriptive information compiled during a study (Holton, 2007). During the process of coding, the researcher continuously asks questions, questioning the data, such as what does the data represent, what does the data reveal and additionally is there any further questions that need to be asked resulting from the data (Elliott, 2018). Thematic analysis

will be used to code all collected data, an approach that is widely used to extract themes from qualitative data (Reed and Payton, 1997). The data will be looked upon and broken down into themes, underlaying theoretical frameworks and perception (Nowell *et al.*, 2017). Pertinent points from the archive material will additionally be coded using thematic analysis.

Nowell *et al.*, demonstrates the initial phase of coding is to familiarize the data, documenting general theoretical and reflective thoughts. Following the initial phase, the data is broken down into codes; these are codes that initially identifies the topic, however does not derive a further meaning to the data or add much insight into what the interviewee is saying. Huberman and Miles (1994) state that the initial patterns will emerge from comparisons between various codes. All codes that arise from the surface of the data were noted as memo style on the Microsoft Word document which includes the data. Following the coding phase, the priority is about focusing on categorising the identified codes, and to start generating themes based on the relationship between codes, the frequencies of codes and the underlying meaning across the codes. In order to identify the meaning of codes and potential relationship between codes, words that demonstrate strong language, repetitive themes and linked ideas will be drawn upon. Holton (2007) whilst exploring the process and challenges of coding demonstrate that words within the data can indicate the relationships between codes, through focusing on the language of interviewee. Additionally, the meaning of codes can be found through the order in which they codes are mentioned within data, the themes being repetitive and the researcher to continuously question strong language within the data (Saldaña, 2021). The codes will be synthesised into categories, defined by what they collectively represent. Krippendorff (2004) state that through exploring and questioning the relationship between codes, one can begin to explore whether the codes are making reference to a specific concept and whether there is a sequence to the codes, which could suggest some codes to be more of an issue or considered to be more important than others.

Following the coding, and categorising the codes into themes, a coding framework will be built, which will reorganise and condense the vast array of initial analytic details into a more detailed outlook of data. From this themes will be defined and reviewed, whilst exploring the relationship between themes. Coding will be finished when the analysis itself has run its course and the categories are saturated, codes can emerge progressively during data collection and additionally the longer one looks at data the more layers of meaning one discovers (Lincoln and Guba, 1985). Fusch and Ness (2015) along with Suri (2011) demonstrates that data saturation is reached when no further insight and perspective in the synthesis of data are identifiable.

Pertinent points from the archive material was additionally coded using thematic analysis, the same coding method as the interviews conducted with senior leaders.

### **3.7 Analysis of data**

Following the coding of 13 interviews along with the pertinent points of the archive material, analysis of data took place when data saturation occurred. The research question and objectives were revisited, exploring how the coded data is illuminating the quandaries initially set out within. A coding framework was built, highlighting the codes and categorise gathered from the data. Integration of primary codes, themes, categories and concepts of the analysis are combined together to investigate how the items might interrelate to create a wider theme within the data (Manikandan, 2010). Within the analysis of coding, the data

will be searched for evidence that support summary statements. Analysis will involve exploring the relationship between categories to reveal the true circumstances thoughts and opinions of the data. Roulston (2014) states that by implementing the following ensures the researcher has explored the data in a meaningful manner, and that the data analysis interprets, structures and presents the data into useful, meaningful information that provides context for the data in hand.

### **3.8 Consideration of alternative methods**

Numerous approaches were considered, with the most suitable method being mix method complex. The philosophical position of the researcher must lend itself to the research question and the methodology in hand. Grounded theory was a method that was considered, however due to this method producing knowledge in the form of a theory as an outcome, this method typically would not suit current research and its objectives. Additionally, Goulding (2002) demonstrated that grounded theorists do not set out to prove or disprove external universal truths, and although criticism is rational, it is ignoring the intention and purpose of the methodology to explain the social phenomena, rather than actually validating and justifying them. Research bias is another disadvantage whilst considering the grounded theory (Goulding, 2002; El Hussein *et al.*, 2014). Following a grounded theory approach would have been put into use should the topic be not well studied, lacking general information; and if the desired outcome of the research was generation of theory with explanatory power.

### **3.9 Anticipated ethical issues**

Ethics application number for the project is 0740202010. The main ethical issues anticipated was ensuring the security of the interview data collected was kept confidential at all times. This was carried out through ensuring that all data collected was done anonymously, ensuring that the interviewees had the option to withdraw from the interview at any time, with no questions asked. All recordings were stored by the researcher, within a password protected file. All recordings will be deleted once a transcript is produced. Additionally, each participant was provided with a participation statement and consent, each interviewee was given these form a week prior to the scheduled interview. Participation statement and consent can be seen in appendix 3.

### **3.10 Limitations**

Interviews by their own nature have limitations in which an element of bias can occur. For example, the interviewees' answers and responses to the questions can be affected by the interviewers' demographics, such as age, location and industry etc. Additionally, due to all the interviews being conducted online using Microsoft Teams, it is suggested that perhaps non-verbal cues are not captured as opposed to interviewing face to face. Non-verbal cues include body language which can indicate a level of enthusiasm for the questions being asked or alternatively indicating a level of discomfort. It is also suggested to be hard to capture raw emotions and behaviours which can influence the participant's thoughts and opinions on a topic. When presenting verbal data throughout the research, one could argue that the researchers has typically misunderstood or drawn on a priori assumption, suggesting the way one interprets the data can be seen as a limitation. In order to reduce this risk, the researcher will carry out all interviews with an open mind, respecting ones thoughts and opinions. Due to the content of the archive material being unknown to the researcher, interviews were carried out alongside the archive material, following the Delphi method. In order to reduce bias within the interviews, a semi structured approach was

taken, where questions were used as a guide, and the interviewees being free to discuss or share information they desired. Additionally the questions asked were piloted beforehand, no interviewees were interrupted whilst participating.

Another conscious limitation is that South America meat industry or any pertinent points might not be mentioned in any of the archive material. Therefore, to further strengthen and ensure that the relevant information is obtained, the idea of longitudinal and cross sectional approach was considered. This includes using the archive material, additionally with interviews that will be conducted with industry professionals, following the Delphi approach. The archive material is managed by the British Library, suggesting there could be funder bias present. To pull the funder bias out of the research, the current interviews with professionals will ensure no funder bias is present.

## CHAPTER FOUR: RESULTS AND ANALYSIS

The following chapter will present the results gathered from interviews conducted with senior leaders within the beef industry, along with the findings collected from the archive material, a collection of pre-recorded material with past Masters of The Worshipful Company of Butchers. All coding evidence from the interviews, along with the archive material coding will be located within the appendices. The salient points, and the bulk of the coding will be presented within the following chapters of research.

### 4.1 The process

In regards to the archive material, all of the CD's were listened to in order to determine whether any pertinent points were made, that could add value to this research. During the process of listening to the interviews, an index page was built, demonstrating the general topic of discussion which could be of benefit to others when coordinating this complex material. See table below demonstrating the content of the whole archive set, including interviewees, reference codes, key discussion within the interviews along with emerging themes.

*Table 4: Table demonstrating the content of the whole archive set, including key discussion within the interviews along with emerging themes.*

Interviewees	Date of Interview	Discussion	Emerging themes
Tom Hixon	December 1998	Mention of South America, in regards to countries such as Chile, Patagonia, Brazil were sending Tom to Smithfield market on commission. Talks about his experience within the wider meat industry.	<ul style="list-style-type: none"> <li>• South America</li> <li>• Travel</li> <li>• Consumer behaviour</li> </ul>
Ken Clements	December 1998	Discussion regarding rationing during the second world war. How Smithfield market transformed businesses, and the difference it made to sales.	<ul style="list-style-type: none"> <li>• Economics</li> <li>• General history</li> <li>• Working conditions</li> </ul>
Vic Johnson	January 1999	Mentions their interests about the meat industry; Edna Johnson also talks, expressing her interest in Charities and her involvement within the local hospice.	<ul style="list-style-type: none"> <li>• General history</li> </ul>
Eric Chambers	January 1999	Mainly about family history; thoughts and feelings about the industry. Some religious elements, lots of thoughts and opinions.	<ul style="list-style-type: none"> <li>• General history</li> <li>• Working conditions</li> </ul>

			<ul style="list-style-type: none"> <li>• Economics</li> </ul>
Terence Bonser	February 1999	Talk about Smithfield market in London, how it was ran; additionally discussion about various cuts of meat, and how the weather effect what the consumer purchases.	<ul style="list-style-type: none"> <li>• Economics</li> <li>• General history</li> <li>• Consumer behaviour</li> </ul>
George Adams	February 1999	How to manage a business, what the working conditions were like during inflation. Also takes us on a factory tour in Ruskinton.	<ul style="list-style-type: none"> <li>• South America</li> <li>• Economics</li> <li>• Working conditions</li> </ul>
Trevor Herbert	March 1999	Discussions regarding methods of production along with management of small butchers shop. Hygiene is a significant theme throughout interviews with Trevor.	<ul style="list-style-type: none"> <li>• Hygiene</li> <li>• Working conditions</li> <li>• Management</li> </ul>
John Breeding	March 1999	Significant information regarding life history, talks about how people influence one another. Fair amount on consumer behaviour.	<ul style="list-style-type: none"> <li>• Consumer behaviour</li> <li>• General history</li> <li>• Management</li> </ul>
Laurie & Rorie Duff	April 1999	Some elements of politics and family life. Significant information on management of business and general production of cattle.	<ul style="list-style-type: none"> <li>• Management</li> <li>• General history</li> <li>• Animal welfare</li> </ul>
Bob Dixon	May 1999	General family history, how they were all connected to the meat industry. Some mention about Bob's economic situation at the time.	<ul style="list-style-type: none"> <li>• General history</li> <li>• Economics</li> </ul>
Brain Hewitt	May 1999	Outlines some of the economic challenges encountered at the time. Mentions how competitive the meat industry is, and how every business is after the same steak.	<ul style="list-style-type: none"> <li>• Economics</li> <li>• Management</li> </ul>
Fred Mallion	June 1999	Discusses consumer behaviour, and how it differs between countries. Mention of South America and how the general public always chooses America.	<ul style="list-style-type: none"> <li>• South America</li> <li>• Consumer behaviour</li> </ul>
Ron Stedman	September 1999	Majority of the interview was on education and training, and how these two elements had influenced Ron's life and the experiences he had. Touches on economic factors and what working conditions were generally like.	<ul style="list-style-type: none"> <li>• Management</li> <li>• Economics</li> <li>• Education</li> </ul>

Colin Cullimore	December 1999	Colin talks about his experience in Brussels, there are some strong opinions throughout. Significant information about how life was back in the day along with what the day to day working conditions were like. Interesting aspects regarding general life, and how culture affected the way people work.	<ul style="list-style-type: none"> <li>• Working conditions</li> <li>• General history</li> </ul>
Geoff Nicholson	December 1999	Interviews main discussion was general history of the meat industry, along with how Geoff got into the meat trade.	<ul style="list-style-type: none"> <li>• General history</li> <li>• Education</li> </ul>
Patricia Dart	1999	Majority of the interviews relating to how Patricia managed her own shop, explaining the general challenges that followed as being a business owner. Reference to the beef they produce.	<ul style="list-style-type: none"> <li>• Management</li> </ul>
Michael Katz	July 2001	Most of the interview is around general history, and some family history. Michael Kats wife also talks on the last recording. Much discussion about the value of the Worshipful Company of butchers.	<ul style="list-style-type: none"> <li>• General history</li> <li>• Training</li> </ul>
David Swain	April 2002	Significant information regarding childhood life along with the education David had growing up, and how this education linked up with the meat industry.	<ul style="list-style-type: none"> <li>• General history</li> <li>• Education</li> </ul>
Christopher Gill	May 2002	Majority of the interview covers Christopher's education, what was the education he had, how the education system worked at the time. Some elements tie in with the training he was given.	<ul style="list-style-type: none"> <li>• Education</li> <li>• Training</li> <li>• Management</li> </ul>
Richard Salder	May 2002	Discussion regarding family history, and Richard's history on how he became a meat inspector. Very descriptive interview, including how standards within the meat industry have changed.	<ul style="list-style-type: none"> <li>• Education</li> <li>• Training</li> <li>• Economics</li> <li>• Importing</li> <li>• General history</li> </ul>
David Walker	June 2002	Discussion regarding how David wanted to travel, he went into the meat industry to be able to travel. Mentions South America – chilling of meat.	<ul style="list-style-type: none"> <li>• General history</li> <li>• Importing</li> <li>• Animal welfare</li> <li>• South America</li> <li>• Travel</li> </ul>

Roger Baker	October 2002	General history regarding his meat industry career. Significant discussion about slaughterhouses and working conditions.	<ul style="list-style-type: none"> <li>• Animal welfare</li> <li>• General history</li> <li>• Working conditions</li> </ul>
Colin Jay	December 2003	The culture of the Latin American countries, and how this culture affected how much meat one consumed. Significant information about Colin's history, along with how much they appreciated the 'American' due to war issues.	<ul style="list-style-type: none"> <li>• South America</li> <li>• Education</li> <li>• General history</li> </ul>

From the 23 interviewees that were past Masters of the livery company, 6 interviewees were considered to be relevant to the research. Although only six interviewees were considered to be relevant, the archive material as a whole is considered to be extremely valuable, with numerous opportunities for further research. As seen within the table above, emerging themes were assigned to each interviewee; the following themes were identified: Animal welfare, importing, training, education, management, hygiene, working conditions, general history, economics, consumer behaviour, travel, and South America. The findings of the archive material will be highlighted in more detail, looking at the ideas within each theme, see table 5.

Table 5: Table highlighting the main ideas within each emerging theme of the archive material.

<b>Emerging Themes</b>	<b>Main ideas within each theme</b>
Animal welfare	Animal welfare was an emerging theme, with many interviewees describing how the livestock were treated on the farm at home and within bigger organizations such as slaughterhouses. Additionally there was descriptive conversations regarding the living conditions of the livestock, and its impact on the end product.
Importing	Importing was identified as a theme, it was a broad emerging theme, where interviewees mostly, explained the challenges and the process of importing meat. Some technology issues came into conversations when discussing imports of meat, such as refrigeration etc.
Training	Training was mentioned within the interviews, with many describing how they got into the meat trade, whether this being through a family business, apprenticeships, working part time etc. Following on from this, how one was trained was described, including the training that was given in all aspects of the meat trade.
Management	Within the interviews, management was recorded as a theme, with many talking about their experiences in managing various businesses within the UK meat industry. Some discussed managing small local butchers shop, with others managing slaughterhouses and bigger organizations. Challenges, how to manage businesses and general thoughts about the UK meat industry was mentioned.
Hygiene	Hygiene was another emerging theme within the material. It was a theme that was referred to, demonstrating how times have moved on. How hygiene practices are taken much more seriously now, and that individual understand why hygiene is so important within the industry.
Working conditions	What it was like to work within the meat trade was discussed, specifically focusing on the working conditions during various times. Whether this be working conditions in slaughterhouses, butcher shops, or working for a retailer.
General history	Many went back in time, discussing how the UK meat industry has changed, and general thoughts and opinions regarding the industry. Many discuss their family history, and how ones family was involved within the industry.
Economics	Economics was mentioned, particularly regarding cost of meat, how it fluctuated, additional comments were made on the price of importing. Economics was discussed very openly within the interviews, including challenging times and hardship.
Consumer behaviour	Consumer behaviour was recorded as a theme, with many describing their customers, what their purchasing habits were, and how they cooked various cuts of meats.
Travel	Some information regarding travel was discussed, some mentioning how much they could travel with work, and other falling into the meat trade though travelling to other countries.
South America	Lastly, South America which consisted of historical memories, technology developments, culture and consumer behaviour, these ideas are looked at in more detail later within the chapter.

Figure 4 demonstrates the wider themes identified within all of the archive material, along with how significant the themes identified within the material were.

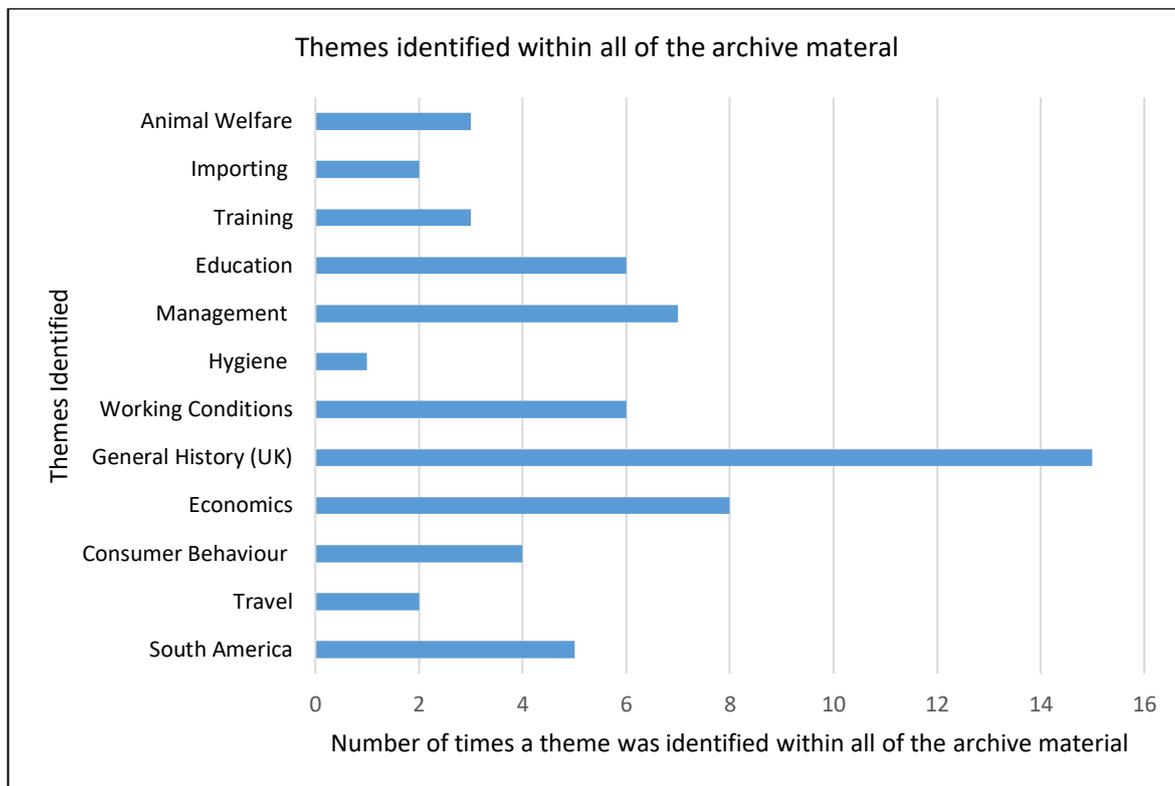


Figure 4: Themes identified within all of the archive material, including significance of the theme.

Within the archive material, limited relevant information was found; however the theme 'South America' was identified five times. Table 6 highlights the themes and categories derived from the five interview that was labelled with the theme 'South America'. Transcripts of the five relevant CD's can be seen in appendix 5.

Table 6: Table highlighting evidence of themes, categories and codes derived from coding relevant archive material.

Interviewee	Category	Data showing evidence
David Walker	Historical memories	"My memory is green pieces of paper with your cables from Australia, New Zealand and yellow pieces of paper which were cables coming in from South America and the whole business was conducted in these days before faxes and satellite telephones by cable."
	Technology	"Flexible Canning was developed in the United States of America by Natick, the American Military Laboratories, and the idea was that soldiers jumping in and out of foxholes kept damaging their ribs by the fact that they carried small cans in their ammunition pouches or in their breast pockets."
	Diversifying	"like all Americans, he came over thinking he's got the United Kingdom because he'd got England and he couldn't expand into Scotland or Wales"
	Training	"We will send you for three years training either to the Argentine, Brazil, New Zealand or Australia and then bring you back"
Tom Hixon	South American influence	"He worked for company American Company which isn't very large in those days"
	Historical memories	"I can remember, you know, quiet all the South America, Chile, Patagonia, Brazil you were great. Almost all the people are sending me to Smithfield. I'm mainly on Commission"
	Social	"I got very friendly with the American people and I took him all over Ireland"

	Social	"I'm interested in comparison with the American way of doing things"
Fred Mallion	Consumer behaviour	"In America, where there were smaller plants. This is another line they've gone down, but the general public go there and buy the packs of meat and not to the shops. So I'm told."
	Education	"He had to go to America.. And we applied loss of funds"
George Adams	Culture	"They rely on exporting"
	*question asked by Louise Broodie (Interviewer)	"Did you ever get so you didn't ever get cattle from America or any anywhere else or just from Ireland?"
Collin Jay	South American influence	"It was a big American influence. Remember, we lived in East Anglia. And the Americans had an influence in the culture"
	Culture	"Well, I think we're very grateful to Americans. I mean, I think that I think there was a clear knowledge that without them that we wouldn't have won the last war, and I think that our parents had sort of realized that."
	South American influence	"I would go to the cinema sometimes with my mother. And of course the films were mainly American. They were certainly some American content."

Themes emerged from the first cycle of coding; these were then further built upon during the second cycle of coding, where typically the codes are grouped into categories. The categories have been formed on the basis of the codes significance in relation to the research objectives. From this, a coding diagram was built, demonstrating all of the significant coding families gathered from the data. At the end of the coding process, eight themes were identified: Environmental; Social; Economics; Political; Technology; Future; Risen to prominence and lastly Production systems. The themes identified reflect the constructivist approach within the study that thoughts and values are personal, however constructed through interaction with others. All themes are highlighted below within the coding framework in figure 5, the evidence of coding can be seen in appendix 6.

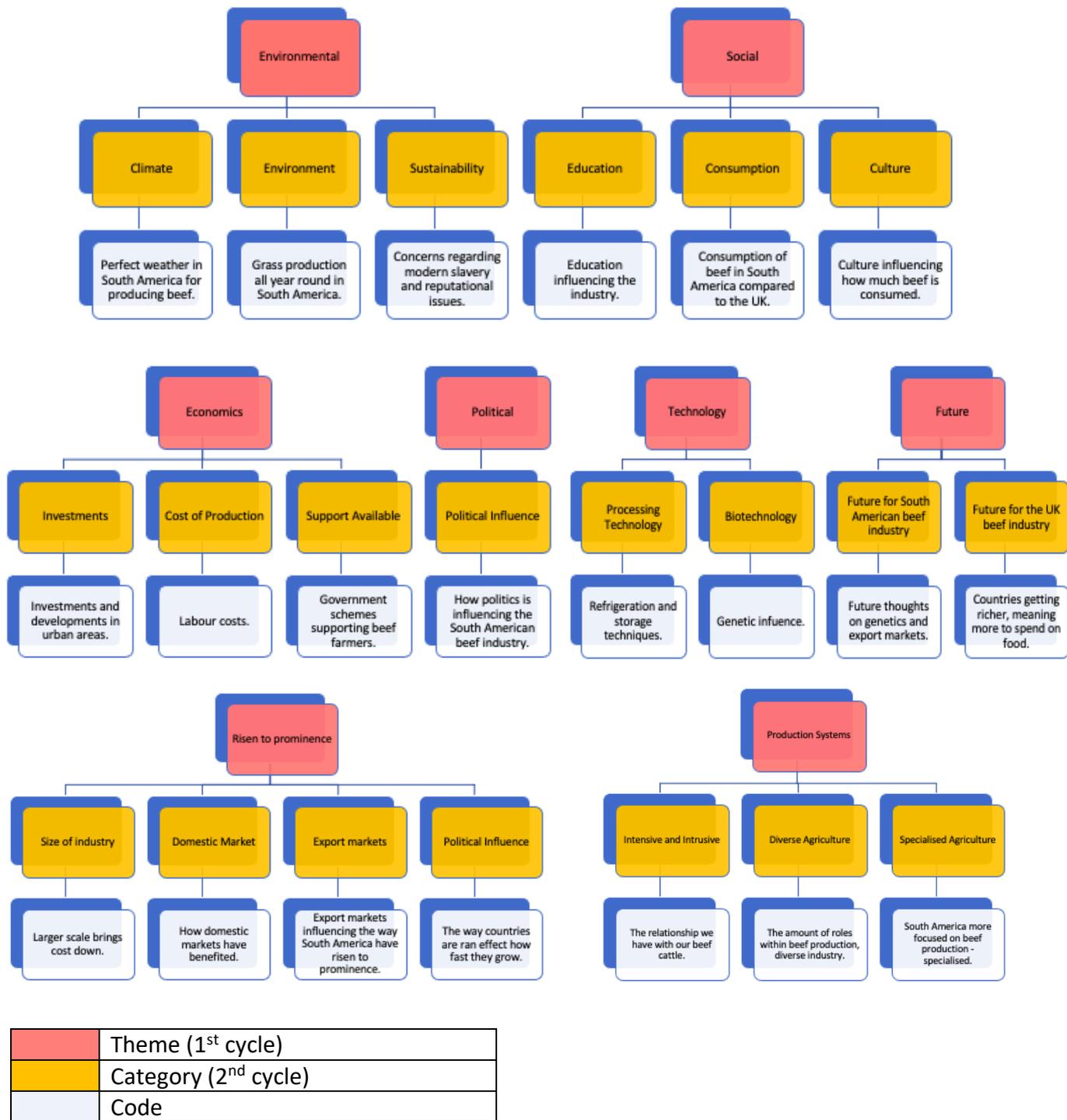


Figure 5: Coding framework, demonstrating all of the coding families gathered from data.

## 4.2 Categories

Throughout the coding stages, it emerged that most of the data collected could fit into the eight themes highlighted within the coding framework. Table 7 demonstrates the bulk of the codes found whilst coding the interviews done via the Delphi method.

Table 7: Table highlighting the themes, categories and codes derived from data.

Theme	Category	Codes within category
<b>Environmental</b>	Climate	<ul style="list-style-type: none"> <li>• Climate's effects on the production of beef cattle.</li> <li>• SA have perfect conditions for producing beef cattle.</li> <li>• SA being able to produce grass all year.</li> <li>• SA beef out all year.</li> <li>• Harsh weather over winter in the UK.</li> </ul>
	Environment	<ul style="list-style-type: none"> <li>• SA's perfect environment for producing beef cattle.</li> <li>• Environment in SA is more low maintenance when compared to the UK.</li> </ul>
	Sustainability	<ul style="list-style-type: none"> <li>• Sustainable beef production.</li> <li>• Brazil's efforts to try be more sustainable.</li> <li>• Sustainable pathways</li> </ul>
<b>Social</b>	Education	<ul style="list-style-type: none"> <li>• Agriculture education within the UK.</li> <li>• Careers.</li> <li>• Guest speakers in schools.</li> </ul>
	Consumption	<ul style="list-style-type: none"> <li>• Domestic consumption.</li> <li>• Consumption of beef in SA.</li> <li>• Consumption of beef from a health point of view.</li> </ul>
	Culture	<ul style="list-style-type: none"> <li>• Domestic beef product.</li> <li>• Beef embedded within SA culture.</li> </ul>
<b>Economics</b>	Investments	<ul style="list-style-type: none"> <li>• Uruguay investments.</li> <li>• English investments.</li> <li>• Brazilian investments.</li> <li>• Future investments</li> <li>• Technological investments.</li> </ul>
	Cost of production	<ul style="list-style-type: none"> <li>• Labour costs.</li> <li>• Export taxes.</li> <li>• Cost of production increasing.</li> <li>• SA more cost effective.</li> <li>• UK beef industry adding costs to production.</li> </ul>
	Support available	<ul style="list-style-type: none"> <li>• European commission support.</li> <li>• Government support.</li> <li>• Grants and schemes.</li> </ul>
<b>Political</b>	Political influence	<ul style="list-style-type: none"> <li>• Politics shape the industry.</li> <li>• Competition between countries within SA.</li> <li>• Brazil repositioning its red meat sector.</li> <li>• Paraguay's political insecurity.</li> </ul>
<b>Technology</b>	Processing technology	<ul style="list-style-type: none"> <li>• Refrigeration and storage techniques.</li> <li>• Chain technology.</li> <li>• Blockchain technology.</li> <li>• Packaging.</li> <li>• Technical aspects.</li> </ul>
	Biotechnology	<ul style="list-style-type: none"> <li>• Genetic technology.</li> </ul>
<b>Future</b>	Future thoughts for South America beef industry	<ul style="list-style-type: none"> <li>• Blockchain technology.</li> <li>• Bright future.</li> <li>• SA will find it hard to further grow.</li> </ul>
	Future thoughts for UK beef industry	<ul style="list-style-type: none"> <li>• Technological developments.</li> <li>• Bright future.</li> <li>• Potential for the UK beef industry to grow.</li> </ul>
<b>Risen to prominence</b>	Size of industry	<ul style="list-style-type: none"> <li>• Large beef producing countries.</li> <li>• Size of SA farms and land.</li> <li>• Herd sizes.</li> <li>• SA – Everything is on a bigger scale.</li> </ul>
	Domestic market	<ul style="list-style-type: none"> <li>• Domestic beef.</li> <li>• Domestic markets.</li> <li>• Depressed domestic markets.</li> </ul>

	Export markets	<ul style="list-style-type: none"> <li>• SA beef exports.</li> <li>• Export sales, something SA is proud of.</li> </ul>
<b>Production systems</b>	Intensive beef production	<ul style="list-style-type: none"> <li>• UK too close to beef cattle.</li> <li>• UK too intrusive and focus too intensely on beef.</li> </ul>
	Diverse agriculture	<ul style="list-style-type: none"> <li>• UK is very diverse when it comes to agriculture.</li> </ul>
	Specialised agriculture	<ul style="list-style-type: none"> <li>• SA focused/specialises in mainly beef production.</li> <li>• SA much more focused in agriculture compared to UK.</li> </ul>

Each theme and category's will be examined individually; however, it's important to note that not all codes mentioned within the table above will be touched upon. This is due to certain codes demonstrating divergence or very little evidence within literature.

Below each category is examined separately, followed by an overall analysis of what these themes reveal about the beef industry within South America.

- Climate

All interviewees mention climate, however, six interviewees talk about climate in depth including how it supports the industry, recognizing the climate within South America being a significant advantage in terms of producing beef cattle. Due to six interviewees discussing climate in depth, it suggests how important they consider it to be to the industry.

*“They just have the perfect climate to produce beef.” (Interview 1)*

*“South America have everything they need, they have the perfect climate, they have the perfect environment” (Interview 2)*

*“very lucky in terms of the weather and their climate, it really is perfect for producing good beef.” (Interview 4)*

Additionally, all of the interviewees associated the climate in South America as the perfect climate to produce beef cattle, but also mentioned that it was a cost effective method; something the UK beef industry simply cannot compete against, having to bring beef cattle in over harsh winter conditions.

*“Here people bring them inside during winter, however south Americans can leave them out all year which is much more cost effective when compared to the UK” (Interview 1)*

*“Stuff such as labour costs, and producing beef that's more cost effective, also here we don't have to put our beef inside, they can stay out all year which is more cost effective” (Interview 9)*

- Environment

Both interviewees living in South America and the UK recognized the importance of looking after our environment; although two South American interviewees mentioned that although they consider the environment to be important, and that we should do everything we could to look after it, this does not happen, as people tend to find it hard to change, and move on from traditional practices:

*“cutting down the rain forests and all the other stuff in Brazil is a challenge, you know we should be looking after our environment, its precious” (Interview 10)*

*“I think in South America, we know we have it easy, but that shouldn’t mean to treat the environment however we want, we need to look after it, and be open to change, and not have the mindset, it was done like this years ago, so this is how we do it today”*  
(Interview 9)

- Sustainability

Within the sustainability category, this theme was identified in every interview conducted. Majority of the comments highlighted that sustainability means something different to one another.

*“people are big now on eating local, but also sustainable and cost effective, but sustainability means different things to different people”* (Interview 8)

Following on from the meaning of ‘sustainability’ differing between one another, sustainability is linked into education, with interviewee 2 stating people should be educated on sustainability and its pathway:

*“Educate individuals, producers, countries, politicians about what sustainable pathway”*  
(Interview 2)

Additional comments were made regarding Brazil and Uruguay’s view and efforts to try and produce beef in a way that would be sustainable:

*“Uruguay wanted their beef to just be as sustainable and grass fed”* (Interview 1)

*“Brazil want a more sustainable beef production”* (Interview 1)

*“Brazil have had huge economic issues and requirements, all to ensure they are as sustainable as possible, and still have loads of work in order to get their beef industry as sustainable as they can”* (Interview 2)

- Education

Interviewee 1 and 2 concluded that education plays a role within the industry, with initiatives happening within schools in Brazil, encouraging young individuals to think about a career within the meat industry or the food industry:

*“I think its seen as a good job, or a good career if you go into producing beef, and particularly doing it well”* (Interview 9)

*“there is a lot that is being done in schools here, especially in Brazil, where they have guest speakers that come into schools, where they talk about the diverse careers that’s available within the agriculture industry, so personally I think this could help the beef industry recruit more young professionals”* (Interview 9)

*“Educate individuals, producers, countries, politicians about what sustainable pathway”*  
(Interview 2)

*Whereas in the UK, I think the mindset is changing, I think we need to be more open about the various roles there is in food and agriculture, the industry is very diverse and has so*

*much to offer, from genetics, all the way down to new product development and processing of this meat”(Interview 9).*

Conversely, interviewee 4, living in the UK, suggested that the meat industry is not seen as an attractive career, additionally, the interviewee highlights that no initiatives such as people going into school introducing careers within the food industry happens within the UK.

*“I know in Brazil they do a lot in schools educating children about the careers, but that doesn't seem to happen here in the UK, it's not seen as an attractive careers is it”  
(interview 4)*

- Consumption

Consumption was a key word that was used in all of the interviews conducted, with many highlighting the amount of meat we consume, but also how our general red meat consumption in the UK has gone up in recent years:

*“meat consumption has gone up. So if it was that bad, from a health point of view, from a climate point of view, and all that negativity that kind of has been circulating around red meat as cattle, pigs and sheep, why has our consumption gone up” (Interview 4)*

Interviewees acknowledge the fact that consumption of beef is much higher in South American countries compared to the UK beef consumption. Interviewee 3 states that beef is considered to be a commodity product, and a staple within ones diet.

*“South America consumes hell of a lot more beef than the UK” (Interview 3)*

*“they really do eat so much more beef than us. It's crazy the amount of beef they eat”(Interview 6)*

*“people in Brazil, Uruguay and Argentina have lived off beef, they appreciate their beef and don't know anything different, it's simply a commodity product.” (Interview 3)*

Additionally, when looking towards the future consumption of beef, interviewee 10 predicts the general meat consumption to continue to rise slowly. Lastly, trends and culture was mentioned within the data, the idea that both the UK and South America have very different culture to one another, suggesting the consumption will be heavily influenced:

*“I think future is looking good, meat consumption will still rise slowly. (Interview 10)*

*“conscious regarding what their eating and their impact on one's health” (Interview 4)*

*“in the UK, we have different culture, and trends that influence the way we eat. For example veganism and flexitarians etc and meat free Mondays.” (Interview 3).*

- Culture

Culture was heavily mentioned within all the interviews conducted, with participants clearly pointing out the differences within culture. Interviewees identify beef to be part of South America culture, a protein that they have always had, and always will have:

*“Due to beef being embedded within culture here in South America, it will always be a big thing” (Interview 5)*

*“It’s a culture where people are always eating meat anyway. That is just the culture” (Interview 1)*

*“Due to beef being embedded within culture here in South America, it will always be a big thing” (Interview 5)*

*“Domestic market too, I’ve mentioned it earlier, but they are very much influenced by culture, whereas in the UK, were considered to be much more trendy in a way” (Interview 8)*

- Investments

Within the theme economics, investments were a category that was mentioned time after time. Focusing on South American countries, interviewees mention investment being a big part of growing the beef industry, with many investments coming from English companies, meaning the infrastructure was continuously improving which led to better logistics in terms on exporting meat. Additionally, data state that investments also led to better technology:

*“What shocked me was the vast amount of English investments, there really was a huge amount of English money, and also English people who had actually moved there” (Interview 6)*

*“maybe even some English investments” (Interview 6)*

*“they all started through a lot of English investment particularly in Argentina” (Interview 8)*

*“investments were used to develop a lot of the distribution services, which obviously helped the beef industry dramatically.” (Interview 8)*

*“Beginning of the 1900’s many of the English traders went there and set up farms, ranches and slaughterhouse’s for processing” (Interview 1)*

*“They bought some rail systems and stuff” (interview 1)*

*“much better investments than us so they will be able to gain better technology development” (Interview 5)*

- Cost of production

Industry professionals generally suggest that the cost of production is cheaper in South American countries compared to the UK; however, additionally they recognise the factors that ensure the cost of production is kept down. These factors conclude of labour costs, along with acknowledging the fact that generally speaking they have the correct climate to be able to leave cattle out all year; whereas here in the UK we would traditionally bring cattle in over harsh winter conditions:

*“with much lower costs here to produce beef, that’s why we have developed to being so big within the market. Stuff such as labour costs, and producing beef that’s more cost effective,*

*also here we don't have to put our beef inside, they can stay out all year which is more cost effective" (Interview 9)*

*"cost of production, its completely different to what it is here now" (Interview 10)*

*"Here people bring them inside during winter, however south Americans can leave them out all year which is much more cost effective when compared to the UK" (Interview 1)*

*"Very little labour costs associated with their beef, they can simply calf on the field and maybe once a month the farmer will go round and check everything is ok" (Interview 1)*

*"The cost of beef production in beef generally Is very low when compared to the UK" (Interview 3)*

Additionally, the professionals suggests that the cost of production is lower in South American beef producing countries due to the sheer scale of the beef industry. Interviewee three recognises the cost of production to come down when the scale of the beef industry increases. Lastly, it was pointed out that the UK are constantly adding costs into the production phases:

*"do everything on a much larger scale to the UK, and when everything is done on a much larger scale It brings cost down." (Interview 3)*

*"We in the UK are constantly adding costs and other costs you know labour costs, and that's where we differ" (Interview 2)*

- Support available

Industry professionals recognise the support available to ones within the industry to be very important. Many mention support coming from government funding, stating that due to the nature and culture of South America as a beef producing countries, the government acknowledges that individuals are passionate about making a living and producing quality beef:

*"there has been a lot of government support, there is, you know, the vast majority of their population live, you know, day in, day out on beef, one shape form or another" (Interview 10)*

Additionally, Brazil and Uruguay was mentioned, particularly highlighting their initiative in supporting businesses trading within the beef industry. Interviewee 4 stated Brazil to have a government scheme in which cattle price was set (OECD, 2021), and should the price be dropped under 80%, the producers would be funded, and this was recognised as a support to the producers. Additionally, Uruguay was mentioned to be a country that supports individuals within the industry, through government support and designing a scheme in which all the beef industry within the country is integrated and well documented:

*"cattle price was set, which meant if the price dropped under 80% of the price, it would be sent to the European commission. This was in place, to support cattle farmers, you know, it was a good thing" (Interview 4)*

*“did was design a scheme, and looked at the stuff they do well, from there they developed what they do well, and now they are doing particularly well. So maybe if we were to follow similar steps and focus on the stuff we do well, that could work”*  
(Interview 8)

- Political influence

Political influence is recognised between all industry professionals as a factor that can have significant influence on the beef industry, particularly in South America. Interviewees mention due to South America importing a lot of their beef, it comes at an extra cost, and will always be influenced by politics and the way a country is ran:

*“I think politics is a big thing, a lot of policies and various arguments shape how the industry is ran, especially you know south America export so much of their beef, and then you have to consider stuff such as export taxes, and various subsidies”*  
(Interview 8)

*“Politics, is huge and this always effects the industry”* (Interview 5)

It was highlighted that government have large powers, which influences the way beef is distributed and sold, all factors such as export taxes, and various subsidies are considered. Due to the politics within South America, countries start to become very competitive and compete against one another. Additionally, political insecurity was mentioned, especially in Paraguay.

*“In Paraguay nearby we have lots of political insecurity”* (Interview 5)

*“government in these countries have so much power”*(Interview 6)

*“Uruguay cannot compete with Brazil and Argentina on volume”* (Interview 2)

*“Brazil has major challenges in terms of repositioning it's red meat sector”*  
(Interview 2)

- Processing technology

Evidence suggests processing technology to have developed within the industry, which has meant changes to the way we process beef. This technology has particularly helped South American in regards to the exporting of beef. Technology such as refrigeration and storage techniques are mentioned:

*“technology has changed quite a lot Morgan. Especially processing technology and refrigeration and storage techniques”* (Interview 7)

*“This is new blockchain technology that's actually just coming into force around trade and traceability in Brazil”*

Additionally, investments within technology was mentioned, which again made South American countries export more beef to Europe. Argentina was also identified as a country that has extremely good facilities for producing beef cattle:

*“Invested in a lot of technology which allowed meat to be actually sent back to Europe” (Interview 1)*

*“In terms of processing I do think south America countries are very good, especially in Argentina, they are absolutely huge and they really do have the best of the best in terms of facilities, so in that sense they are very good. And there power is very big too” (Interview 9)*

- **Biotechnology**

Additionally along with processing technology, biotechnology was mentioned within data, with interviewee six running a beef genetic company out in Brazil. The industry professional states genetics to be a huge business in Brazil at the moment, with it predicted to significantly grow in the future:

*“beef genetics, which I am very passionate about” (Interview 6)*

*“genetics, erm I have lots and lots of experience within genetics and actually that’s what my business currently is” (Interview 6)*

*“genetics is going to be huge, I’m telling you, it will grow and grow, it already is a huge business in Brazil” (Interview 6)*

Other interviewees mention genetics as technology within South American countries to become more popular; additionally this is something South American countries are proud of:

*“They are big on their genetics, this is something they are proud of” (Interview 1)*

*“Land was slowly transforming, and most beef production in Brazil, was down south, with very good breeding and good grass production too, so that helped too” (Interview 4)*

- **Future thoughts for South America beef industry**

It is evident from the data gathered that the industry professionals believe that South America’s beef industry is looking very bright, and will continue to succeed within such a competitive market. Interviewees recognise the size of the industry and therefore predict the industry to continue to be successful, however maintain more than they will grow. Additionally, it is suggested South America will begin to look for new markets, again to build upon production and gain more market share:

*“future is very bright for South America as a whole, the beef industries are thriving there” (Interview 4)*

*“Brazil’s beef industry a bright future which is excellent news” (Interview 5)*

*“I think the future is bright, I don’t think much will change in terms of the amount they produce, they will continue to maintain” (Interview 6)*

*“I think it’s just important to focus on what we do well and build from that, I think that’s how the best things happen, it’s important to continue to develop and build on what we do best” (Interview 8)*

*“I think they will be starting to look for new markets” (Interview 4)*

- Future thoughts for the UK beef industry

In regards to the UK beef industry, again it is suggested to continue to be bright, and productive. Interviewee five makes a comments regarding how countries are now becoming richer, which means consumers will spend more on food which will impact sales of beef. Industry professionals also predict technology to develop further, again making the process of producing beef more systematic. In order to further grow the UK beef industry, Interviewee eight demonstrates that we as a nation should collaborate more in order to further grow and evolve as a beef producing nation:

*“know every country is slowly getting richer and richer and that means more to spend on food. So I do think that the future is looking bright” (Interview 5)*

*“technological developments, I think it will become more of a thing in the future” (Interview 6)*

*“UK beef industry, I think we here have potential to develop further, we have what it takes to go bigger, but in order to do this, I think we as a nation should try to work together more, we really need to collaborate more” (Interview 8)*

- Size of Industry

Industry experts clearly recognise the size of South American beef industry along with it being considered a commodity product. Interviewees acknowledge the amount of beef they export; additionally comments were made regarding how much the farms differ in size compared to UK farms. Their production systems and their methods of producing beef are done on a significantly larger scale compared to the UK:

*“It has always been very big on producing beef” (Interview 9)*

*“export large amounts of beef and have good weather to produce the beef” (Interview 9)*

*“So efficiency and scale of the industry is important to keep in mind” (Interview 10)*

*“One of the largest in regions producing meat” (Interview 1)*

*“Big chunk of export commodity” (Interview 1)*

*“I think size of farm and land. So were talking also about flat areas” (Interview 1)*

*“South America is crazy, being one of the biggest beef producing countries” (Interview 3)*

*“do everything on a much larger scale to the UK, and when everything is done on a much larger scale It brings cost down.” (Interview 3)*

- Domestic market

It is clearly identified within data that South American countries produce beef for their domestic markets. Significant comments by all industry professionals were made regarding the domestic market, and how important these markets are to south

America. Additionally interviewees state the domestic market is said to be the driver within the industry, along with the cultural influence.

*“south American countries produce beef for their domestic markets” (Interview 3)*

*“Brazilian market was still a domestic market” (Interview 4)*

*“domestic market was particularly what was the driver of the market which wasn't particularly large on exporting or even a big producer of beef” (Interview 4)*

*“in South America, it's a domestic product, people doesn't know any different, everyone eats and consumes beef all the time.” (Interview 5)*

- Export market

Industry professionals recognise that beef export markets within South America go back a long way, however is also linked to the way they have risen to prominence within the beef industry. It is also stated that along with the exporting of beef, comes a range of challenges, such as the general cost of exporting goods, export taxes and subsidies:

*“another challenge here is the government, they have a lot of power in today's world and can stop exports and imports just like that, things like export tax and just the general costs of exporting goods” (Interview 5)*

*“Exporting goods is a challenge with the rules and regulations changing all the time, it's very hard to keep up, I hear a lot within my business talking about how complicated it is to export”(Interview 6)*

*“I think politics is a big thing, a lot of policies and various arguments shape how the industry is ran, especially you know south America export so much of their beef, and then you have to consider stuff such as export taxes, and various subsites” (Interview 8)*

*“South American have always been passionate about the beef they produce, they value the food they produce, and are very grateful for all the exports they do” (Interview 9)*

*“export large amounts of beef and have good weather to produce the beef” (Interview 9)*

- Intensive beef production

On the topic of production systems, the idea that the UK agricultural industry is too intense came up within data. Comments were made regarding the UK's relationship with livestock, suggesting that perhaps the UK is too intrusive, and close to their livestock. On the other hand, South America is much more distanced with their livestock:

*“In the UK, we are much closer to the cattle, and one may even say we are too close to these cattle” (Interview 1)*

*“Very little labour costs associated with their beef, they can simply calf on the field and maybe once a month the farmer will go round and check everything is ok” (Interview 1)*

*“much more distanced to their livestock, where here in the UK, we are constantly stepping in, so maybe that could be one recommendation” (Interview 4)*

*“the norm would be to check the fields like one or twice a month” (Interview 4)*

- **Diverse agriculture**

Production systems within the UK agriculture are described as ‘diverse’, whereas if you look at South America, it tends to be much more specialised. Comments from interviewee nine were in relation to production systems and how they differ, with the UK being much more diverse, producing wider range of agricultural products:

*“it can be said they are specialists in producing very high quality beef that everyone’s loves. Whereas when you look at the UK, personally, I think it’s very diverse, very much not focused into one industry, you know it is very broad.” (Interview 9)*

*“Whereas in the UK, I think the mindset is changing, I think we need to be more open about the various roles there is in food and agriculture, the industry is very diverse and has so much to offer, from genetics, all the way down to new product development and processing of this meat” (Interview 9)*

*“there is a lot that is being done in schools here, especially in Brazil, where they have guest speakers that come into schools, where they talk about the diverse careers that’s available within the agriculture industry, so personally I think this could help the beef industry recruit more young professionals” (Interview 9)*

- **Specialised agriculture**

Lastly interviewees recognise South America to be specialised and heavily focused on producing quality beef. Evidence suggests focusing on producing quality beef means countries get to understand their own markets and build upon their strengths:

*“South America as a whole, when you look at it from an agricultural side of things, it can be said that we are actually quite specialised” (Interview 9)*

*“tend to focus more on quality, they really have focused on what they can do well, and built upon their strengths” (Interview 4)*

*“south American countries produce beef for their domestic markets but also they are so focused and specialised, whereas the UK has its hands into everything” (Interview 3)*

### **4.3 Summary of Data**

The categories further demonstrate an element of history, with many interviewees touching on how the countries were ran historically can still influence the way South American countries are ran today. Additionally, a number of industry experts touched on climate and the environment numerous times, stating how they are one step ahead of the UK, simply because of the climate and the environment. Due to this, costs of production differ, due to the UK having to protect beef cattle from harsh winters. Additionally, evidence suggest South America to be specialised in producing beef, whereas within the UK, it is suggested that agriculture is much more diverse, meaning the focus is not directly on one industry. A wealth of information was gathered from the archive material, although

not all relevant to the study, these findings are considered to be important, and therefore should be considered for further study in the future.

## **CHAPTER FIVE: DISCUSSION**

The following chapter will interpret the results derived from collected data, using existing literature to answer and address the research objectives set out. However current research is unique, with no other research papers exploring South America beef industry using archive interviews with past masters of The Worshipful Company of Butchers, additionally interviewing current senior leaders within the industry.

### **5.1 Findings from the Archive Material**

Findings from the collection of pre-recorded material from past Masters of The Worshipful Company of Butchers are considered to be important, with topics such as animal welfare, importing, training, management, hygiene, working conditions, general history, economics, consumer behaviour and travel being touched upon. This is material that the author believes must be used in future research due to its value and contribution of knowledge from past Masters of The Worshipful Company of Butchers, who are effectively the thought leaders of the meat industry in the UK for over 20 years. Although limited information was gathered for this research, the author has catalogued the entire material into an index page, identifying the themes within discussion which is considered to be particularly valuable for future research. The index page can be seen within the appendices and additionally used as a search function for individuals to navigate the material, and recognize its worth.

### **5.2 Objective one: To explore the contributing factors affecting the beef industry within South America**

The main contributing factor that the author expected to come out of the research was climate; this was something majority of literature drawn upon within chapter one of the research highlighted. Findings identify farmers being able to keep cattle outside all year round, which is cost effective when compared to the UK producing beef, and having to bring cattle in over the harsh winter conditions. This agrees with Pinto *et al.*, (2008), stating how much climate influences the beef industry within South America, additionally, demonstrating how the climate influences animal diseases, vectors and pathogens. Although vectors and pathogens weren't mentioned within the findings, animal disease was, particularly the foot and mouth disease, and its impact on the industry. Perhaps issues such as vectors and pathogens weren't mentioned due to many of the senior leaders working within food manufacturing and management roles, rather than directly producing beef on farms.

Other contributing factors that affect the beef industry within South America was generally the environmental costs that link to production of beef cattle. Findings identify factors such as deforestation, degradation of soil due to over farming grassland and loss of biodiversity. These contributing factors agree with a publication by the FAO regional office in Santiago, Chile; discussing the environmental costs linked with livestock production within South American countries; the paper lists contributing factors that impact the beef industry, these include, greenhouse gas emissions, biodiversity, deforestation, shrinking water sources, and over producing beef which degrades the soil and grassland (FAO, 2021). Furthermore, should the environment not be considered in an appropriate manner, the natural resources that South America have will degrade, making it harder to produce beef

at the cost they do today. Additionally, a clean environment ensured the protection of biodiversity and ecosystems, which human life and all other life of earth depend on.

Findings from senior leaders acknowledge sustainability to be an issue within South America and the UK beef industry. What stood out within the findings was Brazil's proactive sustainable efforts, this was something the author found unusual, with much literature and the media portraying Brazil as a country not looking after their rainforests, cutting down trees in order to transform land into suitable environments for livestock (World Animal Foundation, 2021; Viola and Franchini, 2017; Tollefson, 2015; Feasrside, 2017). Supporting thus findings is a study by Reydon *et al.*, 2020, whilst exploring land governance as a precondition for decreasing deforestation in the Brazilian Amazon. The paper concludes by highlighting the government's efforts and initiatives to improve deforestation within the country, additionally deforestation of the Amazon will only be improved through more efficient land governance, along with open discussions about the role that participatory land governance may play in improving land use and land ownership (Reydon *et al.*, 2020). How sustainable the industry is and what countries have in place to be as sustainable is highly important, as this will impact the rest of the industry and how the global beef industry is portrayed within the media.

Lastly, it was identified within interviews with senior leaders that countries are getting richer and richer, which will generate opportunities for the beef industry within South America. This agrees with Milesi (2016) who demonstrated sustainability practices along with countries generally getting richer will create massive opportunities to generate wealth, but additionally threats. The reports discusses the vast opportunities to generate wealth and mitigate poverty, should good political and policy decisions be made sustainable and environmentally friendly. However, sustainability can be seen as a threat should the industry expand, without considering the environmental costs and the effects of the beef industry. Interestingly, senior leaders within thus research do identify poverty within South America; however do not go into detail discussing this issue. Differently to a report by Milesi, (2016), findings of this research do not identify threats to the industry; this could be due to senior leaders working within the industry not wanting to disclose company information, or thoughts that seemed to be too personal.

### **5.3 Objective two: Determine the challenges that have an effect on the beef industry within South America**

General politics and political influence was deemed to be the main challenge for the industry; this was a finding that the author expected to identify following interviews with senior leaders due to politics presence within literature drawn upon in chapter one of the research. It was identified the way a country is ran, highly impacts the way beef is produced, but also how the end product is sold. The government enforced policies and administrative norms can influence the economic development which increases standard of living by moving away from traditional farming cultures to industrialized societies (Ceddia, 2019). This is important, as it will directly influence the beef industry.

Interestingly, within the findings of thus research, the political insecurity of Paraguay was mentioned within politics and political influence. This is also found within research, identifying Paraguay to suffer political unrest, corruption and chronic economic problems. The economy very much relies on agriculture additionally with hydroelectric power to generate income (Correia, 2019). Unlike Paraguay's neighbouring countries, they do not

have a large tourism industry, which again does not help the country (García, 2019). Supporting this is a report on Paraguay, published by the OECD Development pathway, a series that supports the development and emerging economies to identify innovative policy solutions to a country's specific development issue. The report highlights the importance of agriculture to Paraguay due to the concentration of export in primary agricultural products and their derivatives. Additionally, the OECD Development pathway demonstrates living standards to have improved, however states inequality remains to be a major challenge (CEPAL, 2014). Findings of the current research agrees with literature regarding Paraguay's political insecurity. Building upon political security is essential in any country for companies wanting to invest and develop agricultural businesses, particularly the beef industry.

Exports was another challenge that was mentioned; although this was identified as something South American countries is proud of. Challenges included logistical issues, contractual issues and general paperwork documentation. Complying with the vast amount of regulations for both South America and the country importing the goods also requires a lot time and effort. Senior leaders' document exporting adding an extra element of cost, as additional resources is needed, in terms of financing and skilled personnel. Additional challenges that come with exports include competing with other countries for primary product markets; Greenaway *et al.*, (2007) identify strengthening intraregional cooperation with trade agreements made by and for the region could certainly boost movement between countries and outward. Tackling the challenges that come with export is extremely important, due to it being the key to the region's economic performance; ensuring the relationship with major global markets is empirical for successful exports, and therefore should be a priority.

Competition is another challenge, this was highlighted within the literature review, but additionally, senior leaders interviewed drawn upon this, highlighting it as a challenge for the industry. Although the exports of beef and beef products have always been high within South American countries, especially to countries such as China and Russia and others experiencing economic growth and growing consumer markets. Gunning (2016) identifies Brazil and Argentina to be competing with the United States, particularly within the beef industry, with countries simply purchasing the cheapest beef, which therefore drives the price of beef down, which impacts the export markets.

Drought was mentioned as a past challenge by senior leaders located in Argentina. Literature identify severe drought in 2008 (Carbone *et al.*, 2008), that led many Argentine farmers to sell their beef cattle during the following year, 2009; this therefore led to beef shortages (Williams and Anderson, 2020). Findings of this research demonstrated farmers to be reluctant to re-invest following this major drought in 2008 due to government restrictions on export control of beef prices; the Argentine government lifted this restriction in 2016, in order to support domestic prices.

#### **5.4 Objective three: To explore the economic drivers within South American beef producing countries.**

It was evident from the literature review within the first chapter of thus research that economic drivers within South American countries has an influence on the beef industry (Taheripour *et al.*, 2013; Lawrence *et al.*, 2008; Alston and Pardey, 2014). Due to its presence within the literature review, this was something the author expected to identify

within findings of the research, from both the archive material and the interviews conducted with senior leaders. The archive material identified general factors that contributed to the economics of South America, such as exports and size of livestock herds. On the other hand, senior leaders mention additional economic drivers, these included, general markets for agriculture, the sheer volume of livestock they have, the domestic availability of cheap cattle grain feed and technology. All of these factors were discovered within the review of literature.

It is demonstrated that production growth within the beef industry in South America has come from productivity improvements, rather than bringing more land into production (Hernández *et al.*, 2014). This was something the current research did not identify. Gunning (2016) on the other hand identify private and public investments in research and development to have been an economic driver to the beef industry. This was something senior leaders in this research identify, emphasising how much investments have supported the industry, particularly English investments from companies wanting a better infrastructure for distribution of products; this is also identified by other literature (Bond, 2006; Post, 2014; Rasmussen *et al.*, 2021; Rippy, 1954).

Price volatility and the impact of this on food production and the food security of vulnerable populations was mentioned within literature exploring food production within South America (Behrendt *et al.*, 2017; Pereira *et al.*, 2018). This idea was not discovered within the findings of this research, perhaps due to the senior leaders having more experience within the processing and managing of beef supply chains. Research from both Smith *et al.*, (2018) and Vieira Ventura *et al.*, (2020) predicts South American economies to face ongoing headwinds due to competition, which will affect beef producers in various aspects, particularly exports as the United States beef is very much valued in many overseas markets, making it harder for South America to find new opportunities to grow and develop their industry and markets.

Lastly, senior leaders acknowledge countries to be getting richer and richer, which leads to individuals being able to eat better and spend more on food; this is also found within literature exploring economic development of countries (Leamer and Schott, 2005; Handlin, 2017; Stahel, 2020). Exploring and understanding the economic drivers within South America beef producing countries is something the author of research considers essential for the beef industry. It is imperative that beef producers understand and acknowledge these drivers as without these, the industry will not develop economic growth.

#### **5.5 Objective four: To understand how South America have risen to prominence over time.**

Findings demonstrate a number of factors that have contributed to South America rising to prominence over time; the main factors identified within this research were:

- Large cattle herds
- Pastoral land
- Heavily focused on domestic markets for beef and beef products
- Domestic consumption within South American countries
- Specialised in exporting beef and beef products
- Cultural influence

- Climate

The agriculture industry is considered to be extremely important to South America, particularly the beef industry, with it being a basic source of food for the local population. It is evident that the South America region has utilized its resources productively to develop an industry which they are proud of. This is reiterated by The Food and Agriculture Organisation, within the regional office for Latin America, demonstrating the importance of agriculture, especially to its local population, but additionally to its economies (Arequipa, 2003).

Due to the natural resources available to South America, such as the climate, and the large pastoral land; senior leaders' state farmers were able to increase the size of their cattle herd, which meant they were producing more, utilizing the resources available to the countries, which meant they were as cost effective as possible. This is supported by Reid *et al.*, (2008) who explored the global significance of extensive grazing lands and pastoral societies, demonstrating that the local population who live within these conditions and climate are extremely knowledgeable in regards to how to thrive in the face of climatic variability.

Domestic markets and domestic consumption is identified to have supported South America in rising to prominence within the industry. This was something the author expected to identify, since it was discovered significantly within the review of literature. All senior leaders identified how much the domestic markets and the domestic consumption has helped the industry; beef is a product South Americans have always consumed, it is a cultural influence and a staple within their diets; this is supported by Colin Jay, a past Master of The Worshipful Company of Butchers, who mentions the influence of South America to be present. Additionally, many papers identify culture to have had an impact on how South America, beef producing countries have risen to prominence (Malu-Aduli and Holman, 2014; Vasconcelos *et al.*, 2014; Cabrera and Saadoun, 2014). On the topic of domestic market and domestic consumption, literature from the World Health Organization discusses how South America's beef industry has been always meeting demands, ensuring regional and global food security, this however was not mentioned within this research (World Health Organization, 2020). Supporting this statement is research from Marengo *et al.*, (2014), again demonstrating how the beef industry within South America has helped ensure food security, both regionally and globally.

Climate was another factor that individuals mentioned when questioned about how they thought South America has risen to prominence within the industry. Many compared the climate to the UK climate, stating how South Americans can leave their beef outside all year round, whereas here in the UK, cattle is kept inside, protected from the weather during the winter. Due to having good weather, cattle are able to be fed grass all year round which keeps costs down. This is a factor that is mentioned within most literature regarding the beef industry in South America; all the literature focuses on the natural resources the region has, which means the development and the growth of the industry has been done naturally, due to the region having the correct resources needed to produce quality beef (Garreaud *et al.*, 2009; Salazar *et al.*, 2007; de Waroux, Yann le Polain *et al.*, 2019).

Supporting the findings is the Food and Agriculture Organisation, demonstrating with the vast areas of pasture, the perfect climate patterns and rational use of inputs, such as grains and fertilizers. South American countries have the basic natural ingredients and resources

to be a major beef producer, meeting demands and ensuring regional food security suggesting the region has been naturally led to focusing on international trade specialisation (FAO, 2021). This was a theme the author expected to discover from reviewing literature; the idea that South America's agriculture industry is fairly specialised in beef production. Whereas the UK's agriculture industry is much more diverse when compared to South America. No past Masters of the Worshipful Company of Butchers mention international trade specialisation, however senior leaders do, suggesting that specialisation of beef production is something natural due to countries having the resources needed, the climate and the land. Literature from Anderson and Martin (2021) suggests if a country has all the natural resources to produce a product, this encourages or leads countries to explore international trade specialisation. These natural resources include weather, suitable land, crops and livestock, this is something, particularly South America have, which has led them to focus specifically on producing beef. Supporting these findings is research exploring competitiveness of meat and associated products in international trade, and trade patterns in a globalised world, focusing specifically on Brazil (Jámbor, 2019; Nassif and Castilho, 2020). Both identify South America as a continent which focuses on international trade specialisation, which has, over time risen the beef industry to prominence.

### **5.6 Objective five: To explore if there is any potential transferable learnings the UK beef industry could adopt.**

The last objective of the research was to explore whether there was any potential transferable learnings that the UK beef industry could adopt. This was something the author of the research wanted to explore due to South America having much presence and positive impact on the global beef industry. Due to their size, and their specialization within the beef industry it made the author question whether, the UK could potentially apply any learning to our beef industry. This is considered to be an important objective, as the way other countries manage their beef production will impact the UK beef industry. Industries should evaluate and explore other methods, processes and opportunities in order to improve and develop their own.

It was identified from senior leaders that both South American and the UK beef industry differ, in terms of agriculture systems, processes and production. Limited findings were discovered when questioning if the UK beef industry could potentially learn anything from the South American beef industry. Education and technology were considered to be the only factors that the senior leaders mentioned when questioning this research objective.

Education was recognised as something South America do well, educating young individuals on careers within the beef industry. Senior leaders stated that this is something Brazil typically does very well, with various initiatives, such as professionals going into schools discussing the roles available and additionally the importance of agriculture. This is recognised as something the UK could potentially adopt.

Biotechnology was another factor identified, with all senior leaders highlighting genetics being something the UK beef industry could look further into and potentially develop. Having said this, controversial thoughts and opinions were identified within the data, some being enthusiastic regarding the use of biotechnology within the industry, and others highlighting how un-natural and synthetic it is. These mixed-opinions are also seen within research (Choudhary *et al.*, 2016; Baruselli *et al.*, 2019; Oven, 1971; Ames, 2001). Ethics

being one argument, the fact that it is not natural, and that as an industry we would be moving away from traditions and what the typical customer needs. The other argument being in order to develop and make use of research and development of biotechnology, we as an industry should embrace this in order to get the most out of our livestock and develop further providing more food security for the world (Martinez *et al.*, 2000; Espinasse, 1990).

Looking towards the future, all senior leaders predict the future of South America beef industry to be bright, and profitable. However, three leaders thought South America might find it hard to build upon sales, or even grown further. This agrees with Deblitz and Ostrowski, (2004) who demonstrate competition from other countries making it harder for South America to increase market share. Research from Jaurena and Boveri, (2020) also predict South America to find it difficult to gain more market share within the beef industry, however views Argentina to be a country to look out for, especially due to an era of free market reforms, past high tariff exports have certainly impacted the markets (Fischer and Bilenca, 2020).

There will always be a need for beef and beef products within South America, and exports will remain to be something they are proud of. Importing countries will continue to look for the best priced beef; however the idea of safety, quality and trust is becoming increasingly more important; thus suggesting with the UK food industry being excellent within the technical field, it could be something for the UK beef industry to look at due to the element of safety, quality and trust being present within the industry.

Education and biotechnology was identified as factors the UK industry could adopt; however, whilst the author of research has interacted with many senior leaders' producing thus report; the idea that perhaps the UK beef industry should focus on the competition element rather than physically copying the South American beef industry. Furthermore, the UK beef industry perhaps should focus on differentiating the beef and beef products, and compete for differentiation. This would therefore lead to a difference in products, but also potentially better intrinsic and extrinsic qualities.

To conclude this objective, findings of the research identify beef production to be a larger part of South American economies when compared to the UK; this is something the researcher expected to find out. Additionally, education regarding careers within the industry was mentioned as something the UK industry could put into practice. Secondly, biotechnology was identified as something for the UK beef industry to explore, in order to successfully develop; however literature draw upon identifies concerns regarding this technology. Furthermore, the author of research introduces the idea that perhaps the UK beef industry should compete for differentiation against the South American beef industry.

## CHAPTER SIX: CONCLUSION

### 6.1 Conclusions

It can be concluded that South America certainly focuses on international trade specialization within the beef industry. The South American region has developed naturally to specializing in producing beef, due to the availability of its natural resources, such as climate, pastoral land, and herd sizes. It is a region that heavily depends on exporting to domestic markets, which continues to be a challenge when looking for further opportunities to develop and expand the beef industry. Education and biotechnology is suggested to be a potential transferable learning the UK beef industry could adopt. South America beef industry is predicted to have a bright future ahead as countries become wealthier, suggesting individuals will spend more on beef and beef products. To gain full benefit of the pre-recorded interviews with past masters of The Worshipful Company of butchers, further research should be conducted; recommendations for further research is given below, in section 6.3.

### 6.2 Limitations

Limitations within the study was identified, see below:

1. The pre-recorded interviews were managed by The British Library; the nature of these interviews was to capture an insight into the lives of individuals along with their experiences and thoughts regarding the meat industry. A limitation resulting from this would be that no direct and specific question relating to this current research was asked; having said this the researcher can interpret these interviews in a systematic manner, precisely choosing the relevant information specific to the topic in hand.
2. Initially, the research set out identifying pertinent points within the archive material, however, limited information was found within the archive material, with only five interviewees being considered as relevant to the research in hand. This is therefore is considered as a limitation of study, this resulted in the author interviewing senior leaders within the industry which strengthened the research.
3. Another considered limitation on completion of research is that the author was particularly time bound in terms of interviewing current individuals within the meat industry based in the UK and South America. This meant the number of interviews that could be done was restricted due to being under time pressure; should the research project not be under time pressure, more individuals could have been interviewed, which would provide additional value to the research.

### 6.3 Recommendations for further research

Further research within topic area have been identified. Within the archival material, managed by The British Library, limited relevant information was discovered, however in addition to these pertinent points gathered from this material, information that could be of use for other research projects, was observed:

1. Education and training within the UK meat industry.
2. UK meat supply chain
3. people involved within the industry
4. Economics within the UK meat industry

5. Working conditions within the UK meat industry
6. Management of the UK meat industry

From the emerging themes above, the author of the research would recommend the archive material to perhaps be of use to future research projects around those topic areas. Additionally, an index page is built from the archive material, which can be found within the appendices, this could be on benefit to anyone interested in exploring the archive material further. The index page contains information such as, name of interviewees, who was interviewing, all of the reference codes, dates of interviews, what the main discussions were along with emerging themes.

#### 6.4 Recommendations for dissemination

Dissemination of findings is considered to be imperative to the researcher, due to the findings highlighting how important the South American beef industry is for the economy, but also for providing regional and global food security. Findings additionally suggest potential transferable learning for the UK beef industry, this should be disseminated to other researchers, professional practitioners and the wider community for these suggestions to be put into practice. This allows the author to receive credit for the work, network with others within the same research field and additionally establish the results and findings within the scientific knowledge base that future research will be built upon.

Within the dissemination of findings, the author would like to give back to The Worshipful Company of Butchers and share the findings within the UK, but also locally. This will be done via a presentation and podcast to The Worshipful Company of Butchers; explore publication in suitable English journals; and feature within suitable Welsh organizations such as s4c, see table 8.

Due to the archive material being owned by The British Library, the author and research supervisor will disseminate data via podcast, which will include short summaries from the original archived material followed by a conversation discussion of main findings. The aim is to publish this podcast at The British Library, additionally The Worshipful Company of Butchers could have a link to this podcast on their website, and would ensure the material reaches a suitable audience. Additionally, a link to the index page of the archive material will be available on The Worshipful Company of Butchers website, for members of the livery company to navigate the material, highlighting its worth. See table 8 highlighting additional plans for dissemination of findings.

*Table 8: Table demonstrating plans for method of dissemination for research findings.*

<b>Organization</b>	<b>Description</b>	<b>Justification</b>
Brazilian Journal of Animal Science (Revista Brasileira de Zootecnia)	Publishes original scientific articles in the areas of Aquaculture, Biometeorology and Animal Welfare, Forage Crops and Grasslands, Animal and Forage Plants Breeding and Genetics, Animal Reproduction, Ruminant and Non-Ruminant Nutrition, and Animal Production Systems and Agribusiness (Brazilian Journal of Animal Science, 2021).	Recommended to the author by research supervisor and another active member of the academic staff. Organization has the correct audience, that this research is aimed at.

Brazilian animal science (Ciência Animal Brasileira)	Interdisciplinary journal with a continuous publication, and open access, whose mission is to publish full studies in a bilingual format, In the fields of medicine veterinary and animal science and production (Ciência Animal Brasileira, 2020).	Another recommendation by an active member of the academic staff. Correct audience and interest.
Meat Promotion Wales (Hybu Cig Cymru),	Industry-led organization responsible for the development, promotion and marketing of Welsh red meat. They ensure that information that influences Welsh red meat are communicated to stakeholders and consumers. Meat Promotion Wales supports research within the beef sector in order to help the industry achieve the greatest possible efficiency, consistent quality, and sustainability (Meat Promotion Wales, 2020)	Author lives on a family beef farm and have a butchers shop in the local town; therefore would be a great organization to give something back to the community at home, something that could benefit the beef industry. Previously had communication with Meat Promotion Wales. Have demonstrated interest in current research, along with the findings of research being beneficial to its audience.
Ffermio (Welsh magazine TV programme)	Welsh magazine TV programme, featured on s4c Monday nights at 9.30pm. Covering all aspects of agriculture, highlighting issues and concerns that will influence the agricultural industry (S4C, 2021)	Author of research has previously featured on this programme in the past. An excellent programme to disseminate key findings from research, along with following the authors values, see authors personal statement below.
Meat Science	Leading journal in its field for more than 40 year; purpose is to disseminate knowledge on factors that influence the properties of the meat industry.	Perfect audience that disseminate information relating to research topic.
Meat Management Magazine	Meat trade publication serving the UK meat industry, publishing 10 times per year.	Related to topic area, also a recommendation by research supervisor.

## 6.5 Authors personal statement

*“Having grown up on a beef farm in North Wales, Snowdonia, and my father owning a butcher shop in the rural market town of Llanrwst, I have always been interested in the food and agricultural industry, especially the meat industry. Whilst working at a pork processing factory as part of my undergraduate degree at Harper Adams University, many discussions were held on how the meat industry has developed over the years, in terms*

*of trade, demand and opportunities. This sparked the interest of investigating the rise of the meat sector, particularly focusing on the beef sector within one of the largest beef producers, South America.”*

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## Appendices

**Appendix 1:** Table presenting archive material information, including names, dates and reference codes.

Interviewees	Interviewed by	CD code	No of CD's	Reference Code	Date of Interview
Tom Hixon	Louise Brodie	C821/09	1	No reference	December 1998
			2	No reference	
			3	No reference	
			4	No reference	
Ken Clements	Louise Brodie	C821/12	1	No reference	December 1998
			2	No reference	
			3	No reference	
			4	No reference	
			5	No reference	
			6	No reference	
Vic Johnson	Louise Brodie	C821/13	1	No Reference	January 1999
			2	No Reference	
			3	No Reference	
			4	No Reference	
			5	No Reference	
			6	No Reference	
			7	No Reference	
Eric Chambers	Louise Brodie	CB821/11	1	No reference	January 1999
			2	No reference	
			3	No reference	
			4	No reference	
			5	No reference	
Terence Bonser	Louise Brodie	C821/14	1	F7364	February 1999
			2	F7365	
			3	F7366	
			4	F7367	
			5	F7368	
George Adams	Louise Brodie	C821/17	1	F7379	February 1999
			2	F7380	
			3	F7381	
			4	F7382	
Trevor Herbert	Louise Brodie	C821/19	1	F7387	March 1999
			2	F7388	
			3	F7389	
			4	F7390	
			5	F7391	
			6	F7392	
			7	F7393	
John Breeding	Louise Brodie	C821/16	1	F7374	March 1999
			2	F7375	
			3	F7376	
			4	F7377	
			5	F7378	
Laurie & Rorie Duff	Louise Brodie	C821/15	1	No reference	April 1999
			2	No reference	
			3	No reference	

			4	No reference	
			5	No reference	
Bob Dixon	Louise Brodie	C821/22	1	F7700	May 1999
			2	F7701	
			3	F7702	
Brain Hewitt	Louise Brodie	C821/20	1	F7486	May 1999
			2	F7487	
			3	F7488	
			4	F7489	
			5	F7590	
Fred Mallion		C821/ 21	1	F7582	June 1999
			2	F7583	
			3	F7584	
			4	F7585	
			5	F7586	
Ron Stedman	Louise Brodie	C821/16	1	No reference	September 1999
			2	No reference	
			3	No reference	
			4	No reference	
			5	No reference	
			6	No reference	
			7	No reference	
			8	No reference	
			9	No reference	
			10	No reference	
			11	No reference	
			12	No reference	
			13	No reference	
			14	No reference	
			15	No reference	
			16	No reference	
Colin Cullimore	Louise Brodie	C821/41	1	F8826	December 1999
			2	F8827	
			3	F8828	
			4	F8829	
			5	F8830	
			6	F8831	
			7	F8832	
			8	F8833	
			9	F8834	
			10	F8835	
			11	F8836	
			12	F8837	
			13	F8838	
			14	F8841	
			15	F8842	
			16	F8843	
			17	F9225	
			18	F9226	
			19	F9227	
Geoff Nicholson	Louise Brodie	C821/25	1	F7837	December 1999
			2	F7838	

			3	F7835	
			4	F7836	
			5	F7833	
			6	F7834	
Patricia Dart	Louise Brodie	C821/23	1	F7703	December 1999
			2	F7704	
			3	F7705	
			4	F9037	
			5	F9038	
			6	F9039	
Michael Katz	Louise Brodie	C821/70	1	F9840	July 2001
			2	F9841	
			3	F9842	
			4	F9843	
			5	F9844	
			6	F9845	
			7	F9846	
David Swain	Louise Brodie	C821/91	1	F11253	April 2002
			2	F11254	
			3	F11251	
			4	F11252	
			5	F11249	
			6	F11250	
Christopher Gill	Louise Brodie	C821/101	1	F12782	May 2002
			2	F12783	
			3	F12784	
			4	F12785	
			5	F12786	
			6	F12787	
			7	F12788	
			8	F12789	
			9	F12790	
			10	F12791	
			11	F12792	
			12	F12793	
			13	F12794	
			14	F12795	
Richard Salder	Steven Hussey	C821/87	1	F10911	May 2002
			2	F11912	
			3	F11021	
			4	F11022	
			5	F11170	
			6	F11171	
David Walker	Not stated	C821/89	1	F11023	June 2002
			2	F11024	
			3	F11025	
			4	F11502	
			5	F11504	
Roger Baker	Steven Hussey	C821	1	F12099	October 2002
			2	F12100	
			3	F12101	
			4	F12102	

			5	F15129	
			6	F15130	
Colin Jay	Linda Sandino	CB821/104	1	No reference	December 2003
			2	No reference	
			3	No reference	
			4	No reference	
			5	No reference	
			6	No reference	
			7	No reference	
			8	No reference	
			9	14307	
			10	14308	
			11	14309	

**Appendix 2:** Pilot questions for interviews with senior leaders’.

<b>Questions:</b>	<b>Comments:</b>
Please introduce yourself.	Ensure they cover background and what they do within the industry.
Tell me about your interest with South America meat industry?	Consider asking about their experiences within the industry, this could help discover why they are giving the responses they are giving.
How do you think South America have risen to prominence? What are the fundamental factors that have contributed to this, are there any political, or economical type factors that have influenced the sector?	<b>No comments or issue</b>
What contributes to the sales and growth of South America meat sales? Are there any trends you recognize?	<b>No comments or issue</b>
What is different about South America’s beef production when compared to the UK beef production?	<b>No comments or issue</b>
Is there anything that the UK beef industry could learn from South America’s practices? In particular, what can the UK beef producers and processors learn from South America?	Do you need to ask this question to senior leaders’ based in the UK?
In your opinion, what do you think the challenges are for the South America beef industry?	<b>No comments or issue</b>
Are the markets different for South American beef? How does the market for agricultural products differ to the UK?	<b>No comments or issue</b>
How do you see the future beef trade of South America, what will it look like?	<b>No comments or issue</b>
What is there to learn from South America beef producers?	<b>No comments or issue</b>

## **Appendix 3: Information sheet and participant consent form.**

### **Project title: A historical appraisal of the rise of the beef sector in South America.**

1st February 2021 – 28th June 2021

#### **Information sheet for Interview participants**

My name is Morgan Metcalfe and I am inviting you to take part in my research project, 'A historical appraisal of the rise of the beef sector in South America'. The project is part of my Masters of Research studies at Harper Adams University. Harper Adams University is the leading specialist university tackling the future development of our planet's food production, processing, animal sciences, engineering, land management, environmental management and sustainable business. My professional interest lies within the meat industry, having grown up with my family involved within the industry. This project is funded by The Worshipful Company of Butchers.

I am looking to explore the meat industry in South America, particularly focusing on the beef trade. I am hoping to produce a historical appraisal of the rise of the beef industry in South America, looking at how the beef industry have evolved, the key challenges the industry are facing and typically the key drivers within the beef industry of South America.

I very much hope that you would like to take part; This information sheet will try to answer any questions you might have regarding the project, however, please do not hesitate to contact me if there in anything else you would like to know.

#### **Why are we doing this research?**

I have always had an interest in the meat industry, especially growing up on a farm and my father running his own butchers shop in the local town; therefore any research within the meat industry is of interest to myself. In addition to this, South America is known for their high quality beef, therefore understanding how has South America risen to provenance over time, gaining an insight and exploring some of the challenges and drivers within this industry would be of interest to myself and other professionals within the meat industry.

#### **Research aim**

To understand how did South America rise to provenance within the beef industry, particularly focusing on the highest beef producing countries; considering the challenges and key drivers within the industry.

#### **Research Objectives/Questions**

1. To explore that contributing factors affecting the beef industry within South America.
2. Determine the challenges that have an effect on the beef industry.
3. To explore further opportunities and potential markets for the current South American beef industry.
4. To explore the economic drivers within South American beef producing countries.
5. To understand how South America rise to provenance over time.

#### **Why am I being invited to take part?**

You have been invited because I am interested in your experience with regards to the research aims. It is entirely up to you to decide to take part. I will describe the study and go through the information sheet, which will happen over Microsoft Teams. I will then ask you to sign/type a consent form to show that you agreed to take part. Please note you are free to withdraw at any time, without giving a reason.

#### **Will anyone know I have been involved?**

All personal data will be stores and processed in compliance with the Data Protection Act 1998 (DPA 1998). Your name will not be identified or identifiable in data storage, analysis or in research reports or publications.

#### **What will happen to the results of the research?**

The findings from the interviews will be used to develop and contribute to the research objectives that will be discussed throughout the study.

I cannot promise that the study will help you personally but the information gathered from the study will help to understand how South America beef industry is performing, along with some of the key factors influencing the industry. The aim of the study is to gain an insight into South America beef industry, considering the factors the industry is facing, how the beef trade evolved and to explore demand and economic opportunities for the industry.

**Do I have to take part?**

It is entirely up to you whether or not you choose to take part. We hope that if you do choose to be involved then you will find it a valuable experience.

Thank you very much for taking the time to read this information sheet.

If you have any other questions before you decide or if you would like to be involved, please may you confirm your interest by emailing 16013900@live.harper.ac.uk

Please note this project has been reviewed and approved by the Harper Adams Research Ethics Committee (Project number: 0740-202010-PGMRES)

**PARTICIPANT CONSENT FORM**

**Project title:**

If you are happy to participate In this study, please complete this consent form and return to Morgan Metcalfe via email or to the address below.

I have read and understood the information leaflet about the research. YES / NO

I understand that if any of my words are used in the research, they will not be attributed to me. YES / NO

I understand that I can withdraw from the project at any time and that if I choose to do this, any data I have contributed will not be used. YES / NO

I understand that I can contact Morgan Metcalfe at any time and request for my data to be removed from the project database. YES / NO

I understand that the results will be shared in research publications and/or presentations. YES / NO

I understand that other genuine researchers may use my words in publications, reports, web pages, and other research outputs, only if they agree to preserve the confidentiality of the information as requested in the form. YES / NO

.....

Name \_\_\_\_\_ Signed \_\_\_\_\_

Date \_\_\_\_\_

Researcher's name: Morgan Metcalfe  
Garth yr Hwylbren  
Tafarn y Fedw  
Llanrwst  
Conwy  
LL26 0NL  
16013900@live.harper.ac.uk

**Appendix 4:** Index page demonstrating the content of the whole archive set, including key discussion within the interviews along with emerging themes.

Interviewees	Interviewed by	CD code	No of CD's	Reference Code	Date of Interview	Discussion
Tom Hixon	Louise Brodie	C821/09	1	No reference	December 1998	Mention of South America, in regards to countries such as Chile, Patagonia, Brazil were sending Tom to Smithfield market on commission. Talks about his experience within the wider meat industry.
			2	No reference		
			3	No reference		
			4	No reference		
Ken Clements	Louise Brodie	C821/12	1	No reference	December 1998	Discussion regarding rationing during the second world war. How Smithfield market transformed businesses, and the difference it made to sales.
			2	No reference		
			3	No reference		
			4	No reference		
			5	No reference		
			6	No reference		
Vic Johnson	Louise Brodie	C821/13	1	No Reference	January 1999	Mentions their interests about the meat industry; Edna Johnson also talks, expressing her interest in Charities and her involvement within the local hospice.
			2	No Reference		
			3	No Reference		
			4	No Reference		
			5	No Reference		
			6	No Reference		
			7	No Reference		
Eric Chambers	Louise Brodie	CB821/11	1	No reference	January 1999	Mainly about family history; thoughts and feelings about the industry. Some religious elements, lots of thoughts and opinions.
			2	No reference		
			3	No reference		
			4	No reference		
			5	No reference		
Terence Bonser	Louise Brodie	C821/14	1	F7364	February 1999	

			2	F7365		Talk about Smithfield market in London, how it was ran; additionally discussion about various cuts of meat, and how the weather effect what the consumer purchases.
			3	F7366		
			4	F7367		
			5	F7368		
George Adams	Louise Brodie	C821/17	1	F7379	February 1999	How to manage a business, what the working conditions were like during inflation. Also takes us on a factory tour in Ruskinton.
			2	F7380		
			3	F7381		
			4	F7382		
Trevor Herbert	Louise Brodie	C821/19	1	F7387	March 1999	Discussions regarding methods of production along with management of small butchers shop. Hygiene is a significant theme throughout interviews with Trevor.
			2	F7388		
			3	F7389		
			4	F7390		
			5	F7391		
			6	F7392		
			7	F7393		
John Breeding	Louise Brodie	C821/16	1	F7374	March 1999	Significant information regarding life history, talks about how people influence one another. Fair amount on consumer behaviour.
			2	F7375		
			3	F7376		
			4	F7377		
			5	F7378		
Laurie & Rorie Duff	Louise Brodie	C821/15	1	No reference	April 1999	Some elements of politics and family life. Significant information on management of business and general production of cattle.
			2	No reference		
			3	No reference		
			4	No reference		
			5	No reference		
Bob Dixon	Louise Brodie	C821/22	1	F7700	May 1999	General family history, how they were all connected to the meat industry. Some mention about
			2	F7701		
			3	F7702		

						Bob's economic situation at the time.
Brain Hewitt	Louise Brodie	C821/20	1	F7486	May 1999	Outlines some of the economic challenges encountered at the time. Mentions how competitive the meat industry is, and how every business is after the same steak.
			2	F7487		
			3	F7488		
			4	F7489		
			5	F7590		
Fred Mallion		C821/ 21	1	F7582	June 1999	Discusses consumer behaviour, and how it differs between countries. Mention of South America and how the general public always chooses America.
			2	F7583		
			3	F7584		
			4	F7585		
			5	F7586		
Ron Stedman	Louise Brodie	C821/16	1	No reference	September 1999	Significant of the interview was on education and training, and how these two elements had influenced Ron's life and the experiences he had. Touches on economic factors and what working conditions were generally like.
			2	No reference		
			3	No reference		
			4	No reference		
			5	No reference		
			6	No reference		
			7	No reference		
			8	No reference		
			9	No reference		
			10	No reference		
			11	No reference		
			12	No reference		
			13	No reference		
			14	No reference		
			15	No reference		
			16	No reference		
Colin Cullimore	Louise Brodie	C821/41	1	F8826	December 1999	Colin talks about his experience in Brussels, there are some strong
			2	F8827		

			3	F8828		opinions throughout. Significant information about how life was back in the day along with what the day to day working conditions were like. Interesting aspects regarding general life, and how culture affected the way people work.	
			4	F8829			
			5	F8830			
			6	F8831			
			7	F8832			
			8	F8833			
			9	F8834			
			10	F8835			
			11	F8836			
			12	F8837			
			13	F8838			
			14	F8841			
			15	F8842			
			16	F8843			
			17	F9225			
			18	F9226			
			19	F9227			
Geoff Nicholson	Louise Brodie	C821/25	1	F7837	December 1999		Interviews main discussion was general history of the meat industry, along with how Geoff got into the meat trade.
			2	F7838			
			3	F7835			
			4	F7836			
			5	F7833			
			6	F7834			
Patricia Dart	Louise Brodie	C821/23	1	F7703	1999	Majority of the interviews relating to how Patricia managed her own shop, explaining the general challenges that followed as being a business owner. Reference to the beef they produce.	
			2	F7704			
			3	F7705			
			4	F9037			
			5	F9038			
			6	F9039			
Michael Katz	Louise Brodie	C821/70	1	F9840	July 2001	Most of the interview is around general history, and some family	
			2	F9841			

			3	F9842		history. Michael Kats wife also talks on the last recording. Much discussion about the value of the Worshipful Company of butchers.
			4	F9843		
			5	F9844		
			6	F9845		
			7	F9846		
David Swain	Louise Brodie	C821/91	1	F11253	April 2002	Significant information regarding childhood life along with the education David had growing up, and how this education linked up with the meat industry.
			2	F11254		
			3	F11251		
			4	F11252		
			5	F11249		
			6	F11250		
Christopher Gill	Louise Brodie	C821/101	1	F12782	May 2002	Majority of the interview covers Christopher's education, what was the education he had, how the education system worked at the time. Some elements tie in with the training he was given.
			2	F12783		
			3	F12784		
			4	F12785		
			5	F12786		
			6	F12787		
			7	F12788		
			8	F12789		
			9	F12790		
			10	F12791		
			11	F12792		
			12	F12793		
			13	F12794		
			14	F12795		
Richard Salder	Steven Hussey	C821/87	1	F10911	May 2002	Discussion regarding family history, and Richard's history on how he became a meat inspector. Very descriptive interview, including how standards within the meat industry have changed.
			2	F11912		
			3	F11021		
			4	F11022		
			5	F11170		
			6	F11171		

David Walker	Not stated	C821/89	1	F11023	June 2002	Discussion regarding how David wanted to travel, he went into the meat industry to be able to travel. Mentions South America – chilling of meat.
			2	F11024		
			3	F11025		
			4	F11502		
			5	F11504		
Roger Baker	Steven Hussey	C821	1	F12099	October 2002	General history regarding his meat industry career. Significant discussion about slaughterhouses and working conditions.
			2	F12100		
			3	F12101		
			4	F12102		
			5	F15129		
			6	F15130		
Colin Jay	Linda Sandino	CB821/104	1	No reference	December 2003	The culture of the Latin American countries, and how this culture affected how much meat one consumed. Significant information about Colin's history, along with how much they appreciated the 'American' due to war issues.

## Appendix 5: Interview Transcripts

### Interview 1.

**Interviewer:** Please introduce yourself (your background, your industry etc)?

**Participant:** *Right, so my name is Louis. I'm a senior lecturer at Harper Adams University. Uh, I lecture on food marketing and sustainability, but that's before I came to the UK in 2001, I worked for the Foreign Office in Brazil and I had a title of the beef officer. I was responsible for. Promoting all things British, but basically was to do with the mad cow disease. Dissemination of information because at that time the University of Oxford was doing some annual review of their research about how the epidemic was developing and then eventually they predicted that because of the measures of slaughtering animals up to 30 months and stuff, eventually the virus would disappear. So at the end every month every six months I had to go to the Brazilian Ministry of Agriculture and sit down with the livestock people and hand the report and talk about how the disease was at that moment in time. That is roughly my background, very much beef orientated. And now as you know I teach at Harper Adams University, which I thoroughly enjoy.*

**Interviewer:** That's extremely interesting Luis, very knowledgeable person indeed. OK then, now I know and have some insight into your background, tell me about your interests with South America meat industry, what do you find so interesting about it? Particularly focusing on the beef industry?

**Participant:** *Well, yes, because it is one of the largest in regions producing meat. Beef and pork and chicken, yeah. So, and I would say after the US think Brazil and. Argentina yeah, second and third or the other way round. And then you also have some beef being produced from Colombia as well. And then in between you've got Uruguay. So it's a big chunk of the exports commodities sector. Which is not a lot of added value. Yeah, so is commodity OK, either chilled or frozen. Corn beef and all that stuff is hardly any markets left, but also in the late 1800s beginning of the 1900 many of the English traders went there and set up farms and ranches and slaughter houses for processing. They start processing beef, from that, border country between Brazil, Argentina and Uruguay. So that's why the presence of English traders basically yeah, so they created towns they created slaughter houses, they created employment. They brought some rail systems and stuff that doesn't exist anymore. But it's like a swift armor, I'm not sure if you have ever heard of Swift armor. They started in Liverpool, very rough and ready, and now they're big, so that's why, so by default you end up then talking about like coal mining in Wales. Like everyone knows about coal mining and how coal works. But then you ask yourself how has coal ended up in places like Indonesia, so yeah, I think the export market plays a huge part within the industry.*

**Interviewer:** That's great, thank you very much, this now leads us on to my next question, and that is, how do you think South America have risen to prominence so well? What do you think the fundamental factors were that potentially contributed to this?

**Participant:** *I think size of farms and land. So we're talking also about very flat areas OK. So if you think about the pompous which we think of as hills, but they're not hills, actually they are kind of a mount kind of shape. However because the land is extremely flat, it means its no good for agriculture, however it is very good for livestock, and in some parts it is very fertile, however this is more on the Argentine side. On the Brazilian side, they have to be very careful as there is ancient desert beneath the soil. This means if they bring agriculture, which they have done in the past, they mechanize it intensively, which means it*

turns back into a desert with sand dunes and stuff. Remember, these are historical stuff. And then from this in the 1700's, cattle was introduced into the area, and what was good about introducing cattle was that you could move them about, for example the cattle market etc. So in theory, this was the first type of agricultural production in terms of livestock production. At the time there was two major markets, one was Buenos Aires, and they would walk the cattle, but also you would get people driving herds up and down the country. Dry beef markets was also big at the time, and everyone used to talk about it. So, during the process of walking the cattle to the market, they would slaughter cut the cattle there and then, and from this they industrialized the dry meats, so the jerk beef, id say this activity happened during the 1700's, 1800's. So that is when the English arrived, yes the English arrived towards the late 1800's. And during that time, slaughterhouse with refrigeration was very very rare, it was the beginning. So, then from here onwards, they invested a lot into technology that allowed meat to be actually sent back to Europe, and at the time these was semi refrigerated OK, as otherwise everything would be dried beef or jerk beef.

**Interviewer:** How do you see the future beef trade in South America? What will it look like? I know you have mentioned exports etc, will it further grow? Or has it reached capacity? What's your thoughts when looking forward?

**Participant:** I think the future is bright because it's a commodity product, and people in South America will always see beef as a commodity product, you know, they have grown up with beef, and have always eaten beef, they see beef differently to the way us in the UK see it. In the future I see them starting to target markets in Africa and China, because to get product there, the requirements are lower. Additionally, in China and some parts of Africa, they take the fifth quarter, they do not like offal meat, and they do like other cuts that us here don't particularly like, so I defiantly see it moving in that direction. Also I think one of the reasons they will continue to thrive is down the basics such as being able to achieve slaughter weight using free range grass and the cattle being out all year, whereas here people bring them inside during winter, however south Americans can leave them out all year which is much more cost effective when compared to the UK. They literally just have the perfect climate and environment, they are lucky people. Additionally, they have very little labour costs associated with their beef, they can simply calf on the field and maybe once a month, the farmer will go round and check that everything is ok, I think here in the UK, we are in a way much closer to the cattle and one may even say that we are even too close to these cattle. So I think that's definitely an element that makes us different to how they produce beef. Another factor I will mention, is the fact that they are very big on their genetics, this is something they are proud of and do very well, maybe that's something for us to look more into and perhaps utilize it better, I know it happens but, in my opinion needs to be utilized more to get better performance.

**Interviewer:** This is really interesting. Thank you! And then on top of that the heard size is much bigger, isn't it?

**Participant:** I think yeah. The average herd size is about 14 head. Yeah, much larger than what we would have, so yes, that's another advantage they have. You're talking about hundreds there in terms of herd size.

**Interviewer:** That's great, thank you. So into my next question, what do you think South America beef industry are typically doing differently, in terms of producing the beef, developing the finished product, anything. What are the main differences? I know you touched on it during the last question.

**Participant:** *OK, so firstly I'm going to point out they aren't typically big in terms of adding value to the beef there, whereas us here in the UK, we are continuously trying to add value to our beef, and I'm not sure if this is a good or bad thing, but I think that's one big difference. Additionally, I think in Argentina and Brazil, only 20% of the beef produced is exported or something like that. And 18% is eaten domestically, so I think it's a culture where people are always eating meat anyway. That's just the culture.*

*We're just constantly adding cost and other costs and you know labour costs etc, and that's where we kind of differ you know, and also build up the price. So, I'd say that is what makes us, the UK different to them.*

*I was thinking the other day because we had beef steaks last night. Sirloin steak, which I think there were £7.00 each per steak. And in Brazil and Argentina they think about the price of beef in kilograms rather than how much will a beef steak be. And here we just think about how much will a steak be, or essentially the price of one beef steak. So I think price difference is another element, just the way consumers see the price of beef.*

*One thing I'd say that is fairly similar between us is the number of small butcher shops, I'd say it's quite similar here in the UK, you have various regions more wealthy and would have small local butchers shops, but on the whole in terms of butcher shops, I'd say they are slowly declining.*

**Interviewer:** OK, that's great. Thank you. And so in terms of the UK, we've spoken now bit about the differences, is there anything that you think that the UK beef industry here can learn? Can we learn anything from the way they are producing to the way they are selling?

Is there anything that we could put into practice?

**Participant:** *Yeah, I think it's the scale, isn't it. The scale is a different beat all together. Another factor is, at the moment we have this trend of convenience here, all the consumers want everything convenience, from convenient product to cook, and even convenient packaging. So I do think that this trend will eventually reach south America.*

*In terms of anything that we could learn, I'd say they just have the perfect climate and the environment there. You know, over there you can probably have a BBQ 10 months of the year, whereas here were lucky to be able to have a BBQ maybe couple of weeks in the summer. Also, I don't think people are that bothered about meat here, there simply not as into it as South America, I mean here we have the veganism and the vegetarianism, but over there you wouldn't really see this as much. It's a different mentality.*

*Something else I will mention is the media, I think that plays a big role as well, in terms of how we have grown up and one's perception towards meat and the way we consume meat. We always think of chicken as cheap and affordable, whereas with beef it is normally associated with being expensive and hard to cook maybe. I think there's much more processed food here compared to South America, we process our meat much more. But to finish your question, I think the answer is they just have the perfect climate to produce beef, but if anything, the UK is over processing their beef, potentially focusing too much on adding value rather than the base quality of the beef.*

**Interviewer:** Amazing, thank you very much, and that's it. Today's meeting has been very valuable to me, it will be great material for my project. Lastly, thank you very much for your contribution and time. I will stop recording here. Thank you.

## Interview 2:

**Interviewer:** Hello, first of all thank you for helping me out, I really appreciate your support and contribution. Please introduce yourself, your background, your industry etc?

**Participant:** *OK, I'm an engineer OK, And after that I have a Master degree in Agri business. My dissertation for this master in Agri business was a related to beef industry. I have studied the the whole system and why in Argentina the origin and quality assurance systems are not so well developed. So I have done a lot of research in terms of some economic and social factors within the beef industry. Erm, and after that I started to be a Professor in the School of Agronomy in the University Mercedes, where I am still, I still work there. I am professor in agri business teaching undergraduate and graduate students. And actually, I am also the sub director of the Master degree in Agri business and additionally I am also a researcher of the University of Buenos Aires, and I will also work in different consultancy projects in terms of public organizations and companies. Ha-ha, I seem to do a bit of everything, but my passion and interests is within agriculture.*

**Interviewer:** That is great, thank you very much, so my next question is, tell me a bit about your interest with South American meat industry? What's your thoughts on the beef industry in South America as a whole?

**Participant:** *Erm so in 2006, I was invited by the Government of China, to a conference and the same question you just asked me came up haha'. The whole system in South America is crazy, being one of the biggest beef producing countries. I think Brazil is still limited, in terms of the meat they are producing. The real issues here in Argentina is that we are experiencing deep economic and social issues. Also Argentina is known for their people consuming a high amount of beef, but recently the consumption levels of beef in Argentina has decreased in recent years. Also I think the slaughterhouses in Argentina specifically are very well designed in order to process beef and for exporting beef. In terms of demand, there is still strong demand for our beef, with China taking most of our exports. Currently, the domestic markets are down in terms of price we are getting, many factors such as the current pandemic influence this. I also think that our labour costs are relatively low when compared to the UK. The current domestic markets are depressed, with the foreign markets demanding so much, and supplying these demands is the slaughterhouses, I think some issues influencing these and the costs of running the slaughterhouses are mainly labour costs, along with electricity costs, and management costs right?.*

**Interviewer:** I see, I see, this is very interesting, thank you

**Participant:** *I think another big influence affecting the beef industry here is the amount of changes that happen to the companies, there is no consistency within the beef companies meaning things constantly change. And the fact that you will never know how much will the dollar be worth next, because of this many companies require money in advance from exporters resulting in companies having reluctance to set contracts in place. I think the key message I am trying to tell you is, the slaughterhouses are the ones setting the prices, they have so much power within the supply chain, they are incredibly powerful which is sometimes scary. The bigger the slaughterhouse the more power they have within the supply chain. A couple of years back I visited the University of San Paulo and University Purdue and I have visited a feed lot with 20,000 heads. Even then I remember asking various questions to the man that was taking us all around and he highlighted how much power the slaughterhouses have and that it is ruining the supply chain. They said companies would never negotiate with slaughterhouses, as they would always set the*

*scene, it would not be normal to negotiate with slaughterhouses. Generally speaking the price is not negotiable.*

**Interviewer:** That's very interesting that you mention how much power the slaughterhouses have, it's great to speak to someone who has such expertise within the Industry, this will add so much value to my research. Great start.

**Participant:** No problem at all, I mean here, we have something like 303 hundred plants slaughterhouses, but in 2020 there was a stats in an agricultural magazine I purchase saying that something like 25 plants take up 60% of total production which is huge. I mean that is very concentrated, but having said that not as concentrated as it is in Brazil, where four plants or food companies are representing 80% of total production. It's really like playing monopoly ha-ha!

**Interviewer:** That's great, very interesting hearing about your thoughts and how you see the industry. What do you think are some of the challenges? Is there anything that influences the industry potentially causing challenges?

*Participant: I think the biggest challenge is to have a more coordinated supply chain OK. Brazil have a lot more focused market, but having said that we actually don't know too much about their consumer demand, so that's interesting I think. In Argentina, everyone eats meat. I do think in the last few years people are facing some economic problems, for example we eat less beef than we did 10 years ago. Generally speaking, I don't think the slaughterhouses care much about consumers want or even consume. And again, I would like to say that beef is definitely considered as a commodity product, and I think the UK is different, its definitely not a commodity product within the UK, people in Brazil, Uruguay and Argentina have lived off beef, they appreciate their beef and don't know anything different, it's simply a commodity product. I'd say a challenge that they typically face is that they do struggle to add value to products, compared to the UK, they always add value to their beef in order to get a better price etc. I think one thing the UK is doing better is the fact, that our beef could be in a supermarket on the same shelf as the UK beef, and the difference is all in the packaging, the UK beef would always have better packaging, better information, and just better packaging technology. I think we here differ due to beef simply being a commodity product, so I think that's a big big difference. Another challenge is all the exports, markets are getting harder to find, but at the same time, countries are getting richer and richer, therefore you can look at it from both sides of the argument.*

*I do think in some situations, that South America countries could achieve a higher price in some situations, for example they are known to be very reliable and always deliver on time etc, so I think you have got to consider what they do well.*

*The cost of beef production in beef generally Is very low when compared to the UK, especially in Brazil. They basically do everything on a much larger scale to the UK, and when everything is done on a much larger scale It brings cost down. Additionally, the cattle can stay outside all year round which would never happen in the UK, and the herd size so much larger compared to the UK. I think they seem to be much more low maintenance too, typically the farmer would leave the herd in the fields and just check them every now and again, whereas in the UK the farmers tends to me so much closer to the cattle. And because we here in South America can produce beef cheaper, we instantly get a better price for the product. South America have a different type of animal compared to the UK beef industry, so in a way in my opinion South American beef should move forward to a more demand driven supply and maybe move away from the commodity driven supply. There has also been a lot of English investments, especially within*

*Argentina, they have invested a lot of money for example train lines etc, all in the hope of making it easier to transport products etc. Additionally, in Brazil, they have had good developments in technology, they are ahead of the game, with good technology systems in slaughterhouses etc. I'd say it's a very competitive industry with so many people wanting to get involved.*

**Interviewer:** That's interesting, thank you, so that kind of leads us to my next question, one of my research objectives is to look if come the beef industry in the UK, learn anything from the beef industry in South America. Is there anything that we could put into practice? or what's different between both. Is there anything that we can learn?

*Participant: Ok, I'm glad you're finding it useful, that's very good. Personally, no there's nothing we can learn, I find I hard as there both on completely different scale, and are lucky in terms of environment and climate.*

**Interviewer:** That's fine, not problem at all. Ok, so next question is about the future, what do you see the future looking like? I know you have mentioned regarding that you think exports will remain strong, but is there anything else? What do you see the future of beef within south America looking like?

*Participant: That's a very good question, ok so firstly I think the level of beef production will only sustain, I don't think it will never grow higher. I think that in many Southeast Asia countries and African countries, it could potentially grow slightly, but not really in south American countries. Additionally, China takes a lot of our beef, and I definitely think that China will continue to grow and increase their exports of beef from mainly Brazil and Argentina. In a sense I think we are facing a reduction of numbers of cows that could be slaughtered, so in the near future were are moving to slaughtering less, so I mean in that sense I think the exports to China will decrease, simply because we don't have the cattle. Another point regarding the future also is the Covid-19 pandemic, it will be interesting the effect that this will have had on the industry. I do think you know consumer behaviour will have been changed and the way people purchase beef will change, perhaps they will be more mindful about what they are purchasing etc. Another point is that the economics and the politics impact a lot on these sort of industries, the economic situation can change overnight which has detrimental effects on the industry.*

*The most important element or factor that I think you should take from this interview is the fact that south American countries produce beef for their domestic markets but also they are so focused and specialised, whereas the UK has its hands into everything. In the UK, we have different culture, and trends that influence the way we eat. For example veganism and flexitarians etc and meat free Mondays. South America consumes hell of a lot more beef than the UK, and I think that's one of the main reasons as to why it's hard to compare. I know in Brazil they do a lot in schools educating children about the careers, but that doesn't seem to happen here in the UK, it's not seen as an attractive careers is it.*

**Interviewer:** OK, that's really good. Thank you very much, I really appreciate it, This is added so much value to my research. Very helpful. Is there anything that you want to add or is there anything that you want to? I'm very grateful for all of your contribution.

*Participant: No problem at all, and if you if you come to Argentina you're welcome please. So for now, thank you for the interview, goodbye goodbye goodbye.*

### Interview 3:

**Interviewer:** Please introduce yourself (your background, your industry etc)?

**Participant:** *Hi, thanks Morgan yes so I'm currently Deputy Vice Chancellor at Harper Adams University, joined the University in November. My previous role was head of site at Rothamsted Research at Northwick and also a chair and sustainable livestock systems at the University of Bristol. My research probably for the last 10/12 years, is focused on the role that livestock play in a sustainable food system for human and planetary health and what the correct balance is for the consumption of animal based products in 2014 with a few colleagues in Bristol and also the University. We formed what was called the Global Farm Platform Initiative, and if you haven't had a chance, Morgan go into the onto the website where we looked at saying how working together we could follow and start find pathways for sustainable livestock production in many, many parts of the world. Because you know, if you just concentrated, say on livestock production within the UK, you 'gotta very temperate grassland approach, particularly for ruminant livestock, so we got together numerous partners. We now have over 20 partners, on every continent of the globe. Look, we use a research farm to drive what is the most sustainable pathway for livestock production and the reason why I mentioned that is because two of the key partners are based in Brazil and India and also their based in Uruguay. So as part of that network, we've done significant work with both the Brazilian and or Guirong beef industries and research. Under two very, very different strategies between Argentina and Brazil.*

**Interviewer:** That's very interesting. OK then so you obviously have a great wealth of knowledge. Amazing background. Tell me how do you think South America as a whole or you can go into various countries. What do you think the fundamental factors are? How have they risen got so big? What do you think of the factors that have influenced the development of the beef sector.

**Participant:** *Yeah, OK, so as I said both Brazil, and Uruguay have had two very different approaches. Your right, both have risen to prominence in terms of beef production and export market, and both have been driven by exports, particularly into the European Union. Or, you know, wider abroad in China as well. So first I will talk about Uruguay, so what Uruguay decided to do was to really look at itself and ask themselves what do we want our beef industry to be, and they wanted their beef to just be sustainable and grass based. Additionally, they wanted it to be low impact, high value. They concentrated their production systems on British breeds actually, and if you go to Uruguay you will see it's predominantly Hereford or Angus genetics and they concentrated on quality aspect, so they looked at marbling and eating quality, and began to produce a very high value product. It was a niche thing, and was heavily focused on value and quality. They were certainly not going to compete with Brazil or Argentina on volume there, they were very clear on that. Uruguay cannot complete with Brazil and Argentina on volume, but what they can compete on is quality. They invested a lot into grassland beef production systems, whilst moving away from feed lot production. Uruguay simply cannot compete against Brazil, and Argentina on volume. In Uruguay if you look at the land they have and the type of animals they have, along with the challenges, one will understand that Uruguay can utilize Bos indicus genetics and we can go for a calf cow system, which is more silver pastoral in certain regions or grazing. And then we can take that animals to finish within feedlots and we could finish those animals on high concentrate systems and we can get those animals out the door and compete on international markets on volume.*

*Brazil is known to always have bad press regarding the Amazon, where cattle ranchers go in to the Amazon to clear the land, and then taking over is the soybean plantations utilizing the land. This causes a lot of bad press regarding Brazilian beef industry, and rightly so... this is all down to their impact on the Amazon. So obviously the Brazilians and beef industry was getting a lot of bad press, and rightly so, this was all in regards to their impact in terms of Amazon clearing. But there is another side to the Brazilian beef industry, their saying OK, we don't want anything to do with that land clearing, but we want a more sustainable beef production, but we've always constrained in terms of the resource is available to us, so they looked at applying more silver pastoriel systems, but planting trees instead of cutting them down. They are all about co grazing cattle within forestry and looking to produce net zero beef so they have invested significant amounts of money to produce net zero beef. But going down the line of a silver pastoriel system so there's still different aspects of the Brazilian beef industry, because such a big country.*

**Interviewer:** Yes, yes, this is great. This is going to add so much value to my thesis. Thank you. Would you say Uruguay is it seen as more higher quality as compared to Brazil or Argentina?

*Participant: Yeah, absolutely. Anyone who is in the beef trade or the beef industry fully recognizes what Uruguay stands for when it's producing its beef and you only have to go there and look at, you know their grass based systems and when you drive through. They very much produce high value beef and I actually think I'd be very keen for the UK to say look we cannot compete on volume, so let's compete on quality like Uruguay does, I really do think the UK should be a bit more like Uruguay and focus on quality rather than volume, we have the facilities.*

**Interviewer:** Thank you. Your response there is touching on one of the questions I have coming later which is great. OK, So what do you think contributes to the sale? So do you think they're just lucky in terms of the climate and environment? Why is it doing so well? What's your thoughts?

*Participant: So again, different strategies. To help with the beef sector in Uruguay, they have an organization in which monitors every animal throughout their life, this is a massive improvement, and would never work here in the UK as were way too big and it's just too difficult to keep track of everything. However I would like a similar system to take place here In the UK. In terms of Brazil, they have a major research partner, but they have been successful in terms of their beef output and the size of the industry, they are a huge industry and for a while the Brazilian government was not even monitoring how much they were tapping into the Amazon. I think Brazil is a country where they have a lot of resources, and do rely on feedlots. They certainly finish animals a lot quicker compared to us here in the UK. In my honest opinion the reason why they are all doing so well out in South America is they have everything they need, they have the perfect climate, they have the perfect environment, they have everything they need. If you look at us here in the UK, we have to bring cattle in over winter, because we just do not have the weather. Out there the herd sizes are much larger compared to here, and they typically just leave the cattle out in the fields, we are much closer to our animals here as such. Also beef is considered to be a domestic product over there, you know, people have grown up on beef, they consume so much more beef than what we do here, so that's another reason as to why they are doing well or have grown so quickly.*

**Interviewee:** OK, yes I'm with you. That makes sense. One of my research objectives is to see if typically here in the UK can we learn anything or vice versa. Can we add anything into our daily practices that I know will make us more efficient or will help us benefit us?

Is there anything that from the top of your head now that we can typically learn from them?

**Participant:** *Yeah, um, I think it's about very good question and no disrespect to my friends and colleagues. You know within the UK, I don't think we should follow or go down the Brazilian route, we can't anyway. We certainly just haven't got the animals or the resources, and I think when you're looking at livestock production you need to draw red lines and lines that you will not cross even if it improves efficiency. So for example a red line I would always say is, we all know injecting an animal with hormones is to improve performance. I don't think it is appropriate. I don't think it's ethically appropriate, so therefore that's a red line that the European Union was right to draw a line on. Even though it might reduce greenhouse gases and improve efficiency, I think injecting an animal with growth hormone is not appropriate ethically. So I think it's important to have these red lines in place, so we know that we will not cross these lines. I certainly believe we can learn stuff though, such as some aspects for the Brazilian system, particularly their silver pastoral systems and the way there looking at co grazing between trees with cattle.*

*In terms of the Uruguayan's, I think what the UK can particularly learn is to really understand what we want to be as a beef producing nation. I think we should look at our strengths and go from there. So if you think about it, within the UK, we can grow grass. We've got fantastic breeds of animal which have a high level of marbling, therefore will deliver high quality meat product and we start to produce that and move away from the confinements, potentially of the Europa Grid, which basically paid for musculature, not taste. Additionally, If we go into thinking about a sustainable future in the role of livestock products, we need to consume less of a higher quality. So let's hit that higher quality angle and let's say, OK, well, we're not. We're going to concentrate on producing high value. High flavour meat which has a less variation because I'm sure you're very much aware one of the biggest issues within the red meat sector is it's variability. You know you can have one steak one day, and it's tough as old boots and you have another steak the next day and it melts in the mouth. Why is that? One of the reason for that is that actually the way we're grading animals is inappropriate. We're not selecting on eating quality, we're selecting on confirmation carcass, the amount of muscle and fat cover over the backside.*

*I learned so much from Uruguay, they took the best bits of what was happening in Australia. They took the best bits that was happening in the UK. They took the best bits of what's happening in the US and then they looked at what their beef industry could be and design the pathway forward. We should do that. It seems so simple, they take the best bits and put everything into the industry.*

**Interviewer:** That's really interesting how they took the best bits from everywhere, and put it all into theirs. I live on a beef farm, Welsh black farm in North Wales, Snowdonia and we have a butcher shop in the local town and today the customers are very interested In where their meat comes from and what the cattle are fed on, so I do think consumers are becoming more interested in their food and how it has got to their plate.

**Participant:** *Yeah, and that's a really important point, actually Morgan, I think post covid and with the National Food Strategy and thinking about how we need to change our food system, actually, farmers that are connected with local butchers have got a huge potential and a real great future because that is when the farmer is working with their butcher to essentially say, OK what are you looking for and then they work together producing something special. For sustainability of the red meat sector within the UK particularly, there's gotta be an awful, more lot more of those connections.*

**Interviewer:** The next question is, would you say here in the UK do we over process our beef? Do we add too much value?

**Participant:** *It's a really good point because you know it's part of the eat less but better we need to start valuing the true value of meat. For example, red meat. You know why is red meat part of it eat well plate, it's there because of its high value nutrients. Amino acids, vitamin B12, iron, zinc etc. But because we eat too much here in the UK, instead of getting the benefits, we get the not so good stuff, such as too much iron etc, and this is all down to eating too much, so going back to my point earlier, we should eat less but eat better. We really do need to start appreciating and valuing the produce we have here, because it really is good.*

*In terms of over processing, they combine red meat and processes meat together, right, and they are both very different things. When you look at processes meat, the biggest issue is people over consuming. You know, processed meat has a very long chain, for example, on one end of the spectrum you have something like salami, which has preservatives and has been cured, so very processed. But then on the other hand, you have something like a pack of minced beef, which is literally just mincing. So basically, both of those are processing meat, so again I think it about drawing the line. I have actually submitted a form for funding on this type of project, I really want to look into this issue deeper, the complexity of processing beef, and also the nutritional value of processed meat.*

**Interviewer:** OK, last two questions now I won't keep you too long. What would you say the challenges are in South America now, and what are the challenges they have previously faced?

**Participant:** *Oh absolutely there have been many challenges along the way. Brazil has major challenges in terms of repositioning it's red meat sector. It's got this reputation that Brazilian beef is just ruining the the Amazon and it's highly environmentally damaging because they care about that. It might look from the outside that they don't, but they do very much. Additionally, they have had huge economic issues and requirements, all to ensure they are as sustainable as possible, and still have loads of work in order to get their beef industry as sustainable as they can. I suppose the real challenge for the whole red meat sectors is the fact that globally, we need to, in many parts of the world eat less meat. And so therefore it's very hard to say to a sector, um, look, we value your product, but we need less of you. Its just hard. We need to find a correct balance, where we value what people are doing, but in order to be more sustainable we need less of that. People always say to me, you know our consumption of meat within the UK has been rising. Well actually, red meat consumption has been dropping since the 1950s, and we're probably better level now. We need to be careful in the way we produce beef, we really should value our systems, but improve on them.*

**Interviewer:** That's really interesting. Thank you! Right, last question, I know you need to head off. Where do you see the future of beef in South America? Will I grow further? Has it reached capacity? What's your thoughts?

**Participant:** *Well, I think it will continually look for better markets and yes I do they will continue to develop as other countries try and catch up. Erm, they really need to realize there is a potential for a premium market. I think Brazil, will also carry on producing high volume of beef because there really is still a big demand for it. Asia want more beef and Africa is getting richer because of its resource in its infrastructure. Population is still growing and countries are getting richer and richer, so this will definitely impact the industry. Their demand and livestock products will continue to increase, and there's many*

*parts of the world that just need more livestock products for health, particularly parts of Africa. Um, but what we need to do is to help educate individuals, producers, countries, politicians about what sustainable pathway. As I said, too much of a good thing is not a good thing for human and planetary health. Another thing that I haven't mentioned is the rise in flexitarians and the rise in veganism. I don't really see that as an issue though, in terms of global meat production. Individuals have their absolute right to choose what they consume. What is inappropriate is for organisations to say that the only pathway to sustainability is a vegan diet. That's wrong. That's simple. So I've got an issue with that, but actually people making dietary choices- absolutely no problem at all. As I said, we overconsume so someone becoming flexitarians is no problem for sustainable pathway and I don't think will even impact the livestock industries because you've still got natural population growth and we need to centre on less but better, and begin to change that way. So we need to support producers to do that. So I don't see that as a threat. I think that's it really.*

**Interviewer:** Amazing thank you so so much. This is hugely appreciated. You've added so much value to my research, the perfect person I needed to speak to, thank you so much.

#### **Interview 4:**

**Interviewer:** Please introduce yourself (your background, your industry etc)?

***Participant:** In my current role I run three businesses, one of them is a joint venture, where we have a slaughter house in Telford, I also have a manufacture house in Scunford which supplied Mc Donald's, and we have a factory which makes the dips for Dominoes, we do loads of various sauces and dips. I guess my history with south America started in 1999, where I worked for a meat trade, looking for third country trading. And these were markets outside the European union. South Africa, Russia and Egypt was a big market at that time and I was trading beef mainly. They were all beautiful countries, places that you would want to go on holiday.*

*Brazilian market was still a domestic market, it was definitely a driver of the market, and produced a lot of beef, but did not export the beef. It was a destination for sending beef to Brazil, they would always take beef from us. And in the UK when we had too much beef and would never be able to consume it all, it would be sent to Brazil.*

*Farmers In general were asked to step up and produce more beef, but what happened was, when we have more beef the price would drop, then from this a cattle price was set, which meant if the price dropped under 80% of the price, it would be sent to the European commission. This was in place, to support cattle farmers, you know, it was a good thing.*

*So in my current role I run three businesses. So one of them is joint venture arrangement, so we have a slaughterhouse in Telford, and that slaughters around 2000 animals a week, also we have a manufacturing site at Scunthorpe, which makes about 50,000 tonnes of parties for McDonald's, but don't tell anyone! HA-HA, and additionally, we make sauces, and dips etc. We also have a plant based protein line too.*

*So then moving forwards, my history with South America, probably started in 1999, and it started as most things do out of adversity. So I was working for a meat trading company, that stage which was looking after third country trading. So we were trading European product, predominantly beef to third country markets. An these third country markets were*

*markets outside the European community. And at the time, South America was a big market. Russia was a big market, and Egypt was a big market. And then the emerging markets at that time was Philippines, Indonesia. And we had small markets, like the Canary Islands, which was considered to be outside the European Union. Malta and Cyprus, they weren't in the European Union at the time, so yeah. Other beautiful places like Angola, and Algeria, they were all big markets. So top 10 holiday destinations haha, just the place that you want to be going.*

*Around 1995, very soon we have an export ban on Britain, meaning we couldn't export British beef outside the UK. But then, in 1999 or around that time, the rest of the European Union has had a period of time to evaluate their own countries and their own slaughtering. And as such, a lot of these markets around the world said, we don't want any European beef anymore. So we had all these markets and these customers, and additionally, we had a team of people who were very experienced in getting meat around the world, and basically we had no product to sell. So, what we did was we jumped on a plane and we headed to South America, and hit for Brazil, and at that stage, Brazilian market was still very much a domestic market with I'd say, probably about 180 million people, it's probably top 200 million now. So the domestic market was particularly what was the driver of the market which wasn't particularly large on exporting or even a big producer of beef. They roughly had about an animal for every person that's there, therefore the herd was somewhere between 180 and 200 million, or roughly there about at that period of time. But I think it's important to remember how low the exports were at the time.*

*In the late 80's, probably into the 90's, we had far too much beef in the European Union, and we weren't able to consume it all. So we are in a second world war, we had plenty of hunger. In this country, I don't think rationing of beef stopped until 1952. So quite a period after the Second World War. So we still had a shortage of product here. And farmers in general, were asked to step up and produce more. And I suppose a natural reaction was, well, you're asking us to do that now. But as soon as we produce a kilo, the price will fall. And you know, we'll be crying forever. So they said, No, no, no, no, no. in the European Union, what we got is we're going to have a situation whereby we will guarantee you a price. And there's a number of different mechanisms to guarantee that price of which probably in the last few years, the most important one was this intervention level. So we set a guide price for capital price throughout the year. And this was a very good price. And additionally, if the price fell below, if my memory serves me right, and let say it fell below 80% of the guide price, the European Union would say, well, we'll buy it. So when I entered the meat trade, our largest customer was the European Commission. And we sold all our beef to those guys. And what was good about this is that fact it supported cattle farmers.*

*One of my first jobs in 1999, was the last of the intervention beef was to go to Russia from the European Union, they decided to donate 20,000 tonnes of beef to the European to the Russian state government. And the first job that I thought was in 1999, was to try and see if I could go into the competitive tender to see if I could move 20,000 tonnes of beef from Ireland to Moscow. But we didn't win that one. And so we had to go to Brazil. So we went to Brazil and we found a very domestic business, with a poor knowledge of export markets, and a fragmented business. So I think that would be the biggest thing that I would say it was a very fragmented business at that stage. There was lots of owner operators, a lot of family businesses, and not too many groups or large businesses. So in essence, that's what I did for a number of years, and we brought European money and European ethics. And we were well received by the people that were there because we paid our bills, we talked straight, and basically we did not mess about.*

*At the time, the cost of money here in Europe was quite cheap. So you could borrow money for 3% or 4% whereas in Brazil money costs 13 or 14%. So that was another reason*

*we could manage it, it was cheaper for us to finance and it was for them too. And with time it became very successful, and then probably did such a good job of all of it that they employed me, not to blow my own trumpet haha! That's what I like to think. So then I set up an important distribution network within the European Union, for JBS, which is one of the bigger companies in in Brazil and the largest beef company in the world. This was really good in investing, in the fact that we had supply lines at that stage coming from not only Brazil, but Argentina, Uruguay, Paraguay, North America, Canada, and Australia. So this gave me a great opportunity from 2007 open to lead on this job, to be able to visit all those places and develop a relationship and understand the differences between each of the markets that were. So that's probably a very long winded introduction. But hopefully it helps you in terms of where my opinions come from and what perspective I have on various issues.*

**Interviewer:** This sounds like a very prestigious job, if I may say, excellent and so much experience, I think this will add value to my research, I'm very grateful for your contributions. Thank you, there's a lot of information in there, especially in terms of the history. In terms of the relationships between these countries, what would you say the relationship was like, particularly focusing on Argentina, Uruguay and Brazil. Was there any challenges?

**Participant:** *That's an excellent question, I'm glad you asked me that question. So I think around 2007, it was a very interesting time, because soon after I joined JBS in 2008, the European Union pretty much banned Brazil as at the time focus was around traceability and the number of farms that were approved and things like that. So I think if you take a look at its broad ranging question, I would say the difficulty has been more in relation to sustainability issues, modern slavery issues and reputational issues.*

*I'd say we have first world problems, such as 'my belly is full', therefore I better complain about it. For example, if you're hungry in China you wouldn't really complain about it. But on this topic, deforestation is another problem, you know I was really surprised that Brazil in particular has a deforestation perspective. This is because I see Brazil as a very green country, and I say that really honestly. If I was to say to you which country in the world has 99% of their motorcars running on ethanol? If I was to say to you, which country in the world has I think it's 97% of its electricity from hydroelectric power? Which country in the world has a derogation that farmers can't cultivate land within 50 metres of the watercourse? Where you need to keep a minimum of 30% of the land that you farm in its natural vegetation? I think most people would answer Oh, that must be Sweden. That must be Norway. Oh, that can be Switzerland, but very few people would say that's Brazil. So yeah, and I do. I really recognise and saw first-hand how I would consider Brazil to be quite green in certain areas. And I think that's very, very, very poorly known. Deforestation is a really interesting topic. We could probably use a good few hours talking about that.*

*Going back to my experience within the industry, I'll talk to you a bit about each country in terms of how they differ to each other. If I go around Uruguay, lovely country, I found it very, like Ireland, had a similar amount of people living there. Very great big focus on agriculture. Really beautiful country. humble people. diligent, shipped on time, all the time, you know, there were the ones that you could rely on. Never got the same price for their beef as the Argentinians didn't have the scale and size as the Brazilians. That's how I would describe Uruguay.*

*Then Argentina would probably be described as a once great exporter of beef, I had involvement initially when we purchased beef from them in 2006. Again, very friendly people, who very much like their beef. Very much a domestic product, you know people was very much used to eating and consuming a lot of beef, it was in their culture. The main livestock market was located in Buenos Aires, they would have upwards of 30,000 cattle sold on a daily basis. And of course, none of them would be suitable for export after the European Union. It didn't fulfil the requirements but such as you know, of the of the local traders, they're so large.*

*And then lastly, in terms of Uruguay, I'd say they certainly have the perfect climate, again, very nice people, but I would say they tend to focus more on quality, they really have focused on what they can do well, and built upon their strengths, which has worked really well for them. The main thing Uruguay do well is they very much are all on quality, and they also do it very well. A common phrase that people always say is "The best beef comes from Argentina" but I would always disagree, I think the best quality is Uruguay. I'm a great believer in that there's great beef in every country. And there's rubbish beef in every country. I've had great beef and every country and I've had dreadful beef in every country. It just so happens that the Argentinians export the best of their beef to Europe. So there's great beef here in the UK, and there's great beef in Ireland and this great beef in France.*

*Back in the day they would travel so far with the cattle to the markets, they were very dedicated, and the way South America has got so big, it really didn't happen overnight, it evolved slowly. Land was slowly transforming, and most beef production in Brazil, was down south, with very good breeding and good grass production too, so that helped too. There was a lot of involvement In terms of changing the grassland of Brazil, this allowed beef to be produced in more northern areas of Brazil.*

**Interviewer:** That's very interesting, thank you. Did Paraguay come into this at all? Was it very well known within the other big three, so Brazil, Argentina and Uruguay? How did it fit in?

**Participant:** *From my experience with it, they had difficulty in terms of export trade, and issues with it being landlocked, so it was quite difficult to be involved with export trade of Paraguay. We always talk about Brazil, Argentina, Uruguay, Paraguay, and how they have been big beef producing nations But there's plenty of other nations within the world, within that whole South American block that would also be very big producers, just not the biggest.*

*I was out in Buenos Aires at the end of 2019. And one of the people I was with was very keen to see some of the new feedlots that they're introducing in Argentina, but our hosts were very, very reluctant to show anything on the feedlots on the basis of the fact that they feel that feedlot produce beef is compromising the quality, the unique quality of the traditional Argentinian beef. And they didn't want people from Europe coming over to hear too much about feedlot production. Although from our point of view of efficiency and being able to finish animals at a much younger age and all these other things you could do the efficient thing to do was to move to feedlots because they got plenty of crops to feed them. An interesting thing was within Argentina, they all thought that you know, beef should always be fed on grass, and exclusively grass. The Argentinians were always considered to be good.*

**Interviewer:** That's really good thank you, all of this is extremely helpful. I won't keep you too long now, I know you mentioned you have a meeting coming up. What do you see

the future being like within South America? You can focus on it as a whole or go into various countries, what's your thoughts?

**Participant:** *No, no, it's fine don't worry. Yes so I definitely think that the future is very bright for South America as a whole, the beef industries are thriving there, however I do think Covid and the whole pandemic will influence and change the way people purchase beef. I think people will start to become more conscious regarding what their eating and their impact on one's health. In terms of the beef industries in South America, they will continue to perform well, I think they will be starting to look for new markets. I mean they export a lot of beef to China, and with the pandemic, that might influence things, who knows. It certainly has influenced the market, but it might continue to influence in the future to come. That's really all I can think regarding the future, there is certainly a future for South American beef, that's for sure.*

**Interviewer:** That's great, thank you very much. And one last question, what would you say we here in the UK could learn from South America beef industry? Is there anything we could put into practice?

**Participant:** *That's a very good question, and I think yes we could potentially learn and take the good things from South America and add them into our beef industries here in the UK. So I think the main thing is to understand that they do it on a much larger scale, you know they are just very lucky in terms of the weather and their climate, it really is perfect for producing good beef. Again, they are much more distanced to their livestock, where here in the UK, we are constantly stepping in, so maybe that could be one recommendation, to not interfere so much, you know, I think were so close to our livestock and may could say too close. In South America, the norm would be to check the fields like one or twice a month, so that shows you how little interaction they have with their beef, and I think in a way, that's more natural than the way we do it. I think what we do well in the UK is on the packaging side, we are ahead of the game there, so maybe that's something South America could learn from us. Lastly, working within the beef industry in the UK at the moment, all I hear day in day out is about 'adding value' adding value to the meat, adding value for the customer, its all about adding value, consumers want more for their money, but my opinion is to add value we can add something like a sauce or a seasoning on the beef, however the norm these days is to over process, again, I think here in the UK we do over process our foods. Whereas the South American, they always keep their beef cuts simple, and does not process as much as we do here in the UK. But the biggest point I think is they have the perfect conditions for producing beef.*

**Interviewer:** That's great, thank you very much, I really value your thoughts and opinions, very valuable for my studies, thank you, that's the end of my questions, unless you have anything else you would like to add.

#### **Interview 5:**

**Interviewer:** Hello, and thank you for agreeing to take part in the interview, I really appreciate it, if its ok we will go straight into it, so first of all please introduce yourself, your background, your industry etc?

**Participant:** *Yes, OK, I am currently working in the Ministry of Agriculture here in Brazil. At the moment I'm working in the National Laboratory of one of the National Laboratories of Animal Health. I am working with animal disease diagnosis. But I am in fact a federal*

*auditor. That and I work from for the Ministry of Agriculture. Since 2003 it is 18 years I started working with animal feed inspections and then I worked with Animal traceability. And then I worked with rural programs here in our state in Brazil. I was in charge for three years of our the Ministry for Culture Regional Office here in Rwanda. So that is a branch or the office that is responsible for all that. I haven't mentioned it yet, but I am also a vet, I graduated in 1991 and worked for one year within the army as a vet, I worked a lot with horses. After I worked within the army, I spent my time working on my family farm for almost 10 years, producing rice, maize and breeding cattle. It was something I really enjoyed, and put a lot of time into, it was very rewarding I'd say. So to bring you up to date, at the moment I run the farm part time with my brother, and I still work for the Ministry of Agriculture here in Brazil.*

**Interviewer:** That's amazing, sounds like a great experience and thank you very much. The perfect person for my Maters research project. OK. So moving on, tell me first what do you think about South America as a whole in relation to the beef industry? How do you think they grown so big? What do you think influences it?

**Participant:** *Well first of all, America is a huge continent, of course and different from Australia. Major cattle production happens in Brazil, Argentina, Paraguay and Uruguay. And here in Brazil we have similar conditions between the four countries, so it works out well. We have the correct conditions to produce beef and quality beef. For example, we don't have to bring in our cattle at all, it's just perfect, we don't have the harsh winters like you guys have in the UK. We can produce grass during the whole year, and I think that's why we're doing so well. What's interesting is the feed lot industry is growing fast, I mean I don't know Argentina that well, but that's what they mostly use. When I was growing up, being involved within the beef industry was always popular, it was something that everyone was interested in, so I think that's carried on, it's just a successful industry. We have this cultural thing where cattle is part of who we are and what we do. I think In the UK, your cattle are in much better shape than ours, you look after them and provide them with more than enough over the winters, where ours are outside all the time, they are out in the wild, natural climates, but again, this is very viable for us. The herd sizes here are also much much larger than the UK.*

*The North centre and the North of Brazil is different to each other too, because they do not have the same type of grassland, which affects the condition of cattle. They have very dry winters, so they may have to irrigate the pastured to provide faster growth, or even segregate certain areas to allow grass to grow. The main breed of cattle we breed is the Bos Indicus, that originally came from India. I'd say they have grown so big because of the export markets, they are huge, they export a lot to China, and also beef here is also still seen as a domestic product, we have always grown up eating beef, we don't know anything different, it's just something were always used too, and this is not something the UK have, its seen as expensive meat in the UK.*

**Interviewer:** That's great, thank you, what do you think contributes to the sales and the growth of South America beef? What do you think? Why? Why is it so popular? Why is it? Why is it doing so?

**Participant:** *Well, first of all because it's cheap. OK we can produce cattle as I said, we have the condition will have. Grass is like we have. Even now what we have is technology. The technology has developed huge amounts over the years, we have all the information we need and its working very well, everything just works hand In hand. We produce huge amounts, and I think you know we have always produced loads of beef, were known for producing beef, so I think that helps us naturally. Erm... were always productive, its*

*actually not hard work producing beef here, the climate and environment is always on our sides, there not much involvement with the cattle. A lot of farmers like me produce beef part time, because they don't require huge amounts of work, so a lot of people work full time and have beef farms, it's just very efficient. Trends is another thing that affects the markets, for example China have a huge appetite for not only beef, but also chicken and pork, and since the African swine fever outbreak, they are importing a lot from South America, they are basically importing everything we produce at the moment, but it's important to be mindful how much trends can influence these markets.*

*Another factor that comes into the beef industry and plays a huge role is the economy, due to us exporting huge amounts of beef, the economy is currently being maintained, we have been exporting huge amounts over the last two years, and the prices have been relatively good too. Additionally, there has been lots of investments and development in urban areas, they have changed dramatically which has boosted the economy here. Now the development in Brazil is more about the rural areas, and the countryside, so I think it will give Brazil's beef industry a bright future which is excellent news.*

*Additionally, you have all the other general stuff that impacts the industry, such as everything, there are the things that typically impact loads of other industries. Sometimes it really is a hard cycle, you know, the prices are always fluctuating, feed prices and all the other things we need in order to produce good beef. If the prices of feed go up, then the price of beef instantly goes up too. Politics, is huge and this always effects the industry, people are very protective over their industries. I think I mentioned it earlier on, but countries really are slowly getting richer and richer, which means more people will purchase beef. This is a type of industry that will always be here, you know, especially here in South America, it's a domestic product, people doesn't know any different, everyone eats and consumes beef all the time.*

**Interviewer:** This is great, sounds very good, in terms of the UK beef industry, is there anything that we could potentially learn from South America beef industry? Anything we can maybe put into practice?

**Participant:** *I think we can learn lots, I mean there is always new stuff that can help the industry, and also new technology being developed to aid the industry and make us more productive etc. It's important that the UK and South America does not get stuck in their ways in terms of producing beef. It's important to always try and learn and develop all in the aim of being as best as we possibly can be. I think if you have the technology, much more investments will happen, which will benefit the industry. Another thing that I think both the UK and South America could do is focus more on biotechnology, I think it could add so much value to the industry, in terms of the beef we produce. Looking at how biotechnology has helped the current pandemic shows us how much it can help, but having said this, some people do have concerns regarding ethics and the safety of using biotechnology. However, I think it could transform and help the industry move forward. Another issue of technology is people often argue whether it is safe or not. Another issue you might have in the UK is that the costs are much higher, people here work for cheaper, traditionally people who worked in the countryside got paid very little, and the wages are still little. Also the economic situation of the country affects, so that's another thing that is typically hard to change, you know, its out of everyone's hands. And because people here are being paid less, we can instantly produce cheaper beef, and we all know cheap beef will always sell, so instantly we are one step ahead by being able to produce cheaper beef compared to the UK. I think markets in the South East Asia will continue to protect Brazil, you know every country is slowly getting richer and richer and that means more to spend on food. So I do think that the future is looking bright.*

**Interviewer:** That's great, really good suggestions, so on your last comment there, where do you see the future going? What will It look like? I know you mentioned it is looking bright?

**Participant:** *Absolutely, I think the future Is looking very bright, I think in terms of size it will stay as it is but perhaps grow steady but not too much, I think the problem with growing it further is, the market is extremely competitive and everyone is constantly fighting for more business. Additionally, there is some uncertainty around with the pandemic, who knows what will happen. Consumers purchasing behaviour and the way they consumer beef could change, and therefore impact the beef industry here in South America. In terms of moving forward, exporting beef will remain a big thing here. Also, due to China taking so much beef from us, should something happen in China, I don't know, but maybe and outbreak of disease, it will heavily impact us, as we will have so much beef but nowhere to sell this beef. Due to beef being embedded within culture here in South America, it will always be a big thing, you know people love the beef and live off It. It really is considered as a domestic product.*

*I think I mentioned it earlier, I really do see technology being able to develop the industry so much, it really will add so much value into our industries. The possibilities are endless here. Currently there is a lot of talk regarding transgenic technology or genetically modified technology which I personally think is a very useful tool, now currently, of course, the UK have much better investments than us so they will be able to gain better technology development. I do think sometimes within the beef industry that whoever is the weakest, will always suffer the most, it's a highly competitive market, and you have to always remember that, you know. But yes looking at the future, it will be hard, but everything that's worth having is hard, we just have to push through the challenges, it will certainly have a bright future.*

**Interviewer:** So the next. I've got one more question and then I won't keep you too long in terms of that. This kind of leads now to the next question, what do you think the challenges are for the beef industry in South America now what? What do you think? Constraints etc.

**Participants:** *One of our biggest challenges is that this Chinese dependence, we depend on them so much for them to take our beef, so if something happened we would struggle if china did not want our beef and would have to look for more markets. I'd say another challenge here is the government, they have a lot of power in today's world and can stop exports and imports just like that, things like export tax and just the general costs of exporting goods, so yeah the power of the government is another challenge. Another challenge I would say is slowly the costs are increasing slightly, which means we will have to charge more for our beef in order to make the same money, I know I mentioned that costs of producing was low, but over time I see these labour costs increasing which means our beef will become more expensive. So companies will be competing against each other for the cheap beef.*

*Also In Paraguay nearby we have lots of political insecurity, and additionally in Argentina they have the same issues, they have huge economic crisis. I think here in Brazil, we are losing the value benefits, you know we import a lot fertilizers etc, and all these cost us money. Maybe the press can also be considered and a challenge that the industry constantly have to battle with, you know we get a lot of bad press here in Brazil, saying we are killing the Amazon, however this is very wrong. We are actually very green when you compare us to different countries and we actually have lots of different initiatives and schemes that ensure we are doing the absolute best. But even though we have all of these*

*schemes, we still manage to get bad press, and I do think it's actually quite hard when we as an industry that is doing their very best, have to compete with the media, it's something we shouldn't have to do. But I think there kind of the main challenges I can think of, but you know challenges constantly creep up and we as an industry deal with them and move forwards.*

**Interviewer:** That's great thank you, and I think that's the end of my question, do you have anything else you would like to add, or any comments about anything we have talked about today?

**Participant:** *No, I think that's it, I hope I have been some help to you, if you think of anything you would like to ask me, feel free to send me an email etc, and I can do my best to answer.*

**Interviewer:** Ahhh, that's great. Thank you so much, this is been a massive help and it will add so much value to my project and that's all my questions really. Unless you have anything else that you'd like to add, I think that's it, I'd like to say thank you again, I really appreciate all your contributions.

#### **Interview 6:**

**Interviewer:** First of all thank you very much for helping me out, it will benefit me massively having your thoughts and opinions, I'm just looking to have a general chat, I have a couple of questions planned, but anything you want to add, I'd be more than happy to listen. So first of all, please introduce yourself, your background, your industry etc?

**Participant:** *I was born in Norfolk. Where we had a family beef farm. I have always worked within the agriculture industry, and have had previous experience working managing beef farms based in Brazil. I also have additional experience in beef genetics, which I am very passionate about. I am currently a director of a sugar and alcohol company, but that's another thing ha-ha. I have been heavily involved within beef, especially in Brazil.*

**Interviewer:** That sounds very interesting, loads of experience, the perfect gentleman for me to talk too, I think you will add so much value to my master project. Right, if its ok with you, I will ask you the first question, and that is tell me about your interest with South America meat industry, what experiences have you had within the industry?

**Participant:** *Well, I mean I was born Norfolk, and when I was fairly young I flew out to Brazil for work experience on a farm, a beef farm actually. So I always remember South America was always a country that I wanted to visit, and as a kid I think the main attraction was just the big farms etc. And anyway from the work experience I worked on more beef farms and started managing these huge farms, basically grew from there. But no, honestly Brazil is an amazing country if you ever get a chance to visit you really should. I absolutely love it. I am currently chatting to you from Norfolk, but I visit Brazil often for business purposes, and I'm currently stuck here with covid, everything happens on teams, thank god for the internet.*

**Interviewer:** That's great, yes I have never visited, but it's definitely on my list! Ok, so next how do you think South America have risen to prominence? What at the fundamental

factors that have contributed to this, is there any political, or economical type factors that have influenced the sector?

**Participant:** *Ok, so that's a very good question, I will try answer my best, but I'm not sure if it will be any good. Ok so when I first started out in the business of beef producing and all that jazz in south America. What shocked me was the vast amount of English investments, there really was a huge amount of English money, and also English people who had actually moved there, it was a very good place if you wanted to make good money producing beef, you know they always had the better contacts, the climate and the environment is just good, everything is better, in a way they do have the perfect climate. In terms of how they rose to prominence, I'd say it really is a domestic market, you know it's in the South American's blood, they live off beef, and if you look at the consumption levels, they really do eat so much more beef than us. Its crazy the amount of beef they eat. They really do enjoy it. Additional factors are thigs like, export taxes and subsidies, they affect the industry a lot. The government in these countries have so much power, they can instantly holt production and exports just like that with no warning. Lastly, I think its known, you know everyone knows that everyone eats beef in South America, everyone know South America produces loads and loads of beef. It's just a fact. Also you would never really see veganism or vegetarians there, whereas in UK there's a lot, and lots of campaigns that I don't know perhaps ruin the potential beef that could be sold. But like I said lots of factors come in to why south American counties are doing so well selling and producing beef. China buy a hell of a lot of beef, you know without china, where would we be.*

**Interviewer:** Ok, amazing, that's a great start, and I found it very helpful, thank you. So I know we have touched on this, but what contributes to the sales and growth of South America meat sales? Are there any trends you recognize?

**Participant:** *Hmmm, well I do think that consumers are wanting to know more about their food, and that's in Brazil and additionally in the UK, you know people are more interested in wanting to know where the food was produced, what the cattle was fed on etc. So I would say that that's kind of the trend I see amongst consumers. I mean in Argentina, I understand feedlots are becoming a big thing and lots of beef farms out there using them. But funnily enough, I mean I don't have a problem with feedlots, I really do believe in them, but the Argentinians actually are slightly embarrassed to say they use them, they believe it affects the quality of the beef which is crazy I think, but then again everyone is entitled to their own opinion. I mentioned earlier on, but you know, China takes a lot a lot of beef, and I think it really would affect the Chinese stop purchasing beef, you know were in a way dependant on them, which we really shouldn't.*

**Interviewer:** Yes exactly, they reflect my thoughts, really good. Next, what would you say is different about South America's beef production when compared to the UK beef production? What's the main things standing out?

**Participant:** *OK, so first of all, I think it's good to highlight that within South America and the UK, there is good beef and both places produce excellent beef. I mean you have to say the climate, you know south America have the perfect climate, especially when you compare it to here in the UK, you know look at our winters, nothing grows, all the land is just so wet, and we have to bring cattle in, simply because of the harsh conditions; so I'd say that's the main difference. South America do everything on a much larger scale compared to us, you know they are bloody huge compared here, their scale of production is out of this world. Everything is just larger, even when you look at the herd sizes and the size of farms. I do think even though we here in the UK have produced beef for years and*

years, beef production in south America seems much more natural, and you might be wondering why the hell I'm saying that ha-ha. Well I think, you know, I'm a big believer in livestock living a life that is as natural as possible, you know they should always be out on nice grass. Here in the UK, we bring our stock in over winter, and I understand and get that they will be very happy inside etc, but I just think they should be out all year round, that just would never happen in the UK. So following on my point, I would say that that beef production in south America could be more cost effective, you know here in the UK, I get that the cattle are happy inside over winter, but its additional cost for us. People will definitely disagree with me, but that's my opinion.

**Interviewer:** That's excellent, thank you very much.

**Participant:** I'm glad it's some help, another difference I think I'd say is the general cost, I know I mentioned its more cost effective but, everything seems to be much cheaper, especially when compared to the UK. So you know, your labour costs would be much lower, and lower costs means cheaper beef. So that's another big difference when comparing the UK with south America beef producing countries.

**Interviewer:** Amazing, thank you so much, that's great, next question I had in mind was, is there anything that the UK beef industry could learn from South America's practices? In particular, what can the UK beef producers and processors learn from South America?

**Participant:** OK, so I do definitely think that the UK beef production can learn lots from South America, but also south America could learn a lot from the UK, you know the UK does amazing with technology, and I think they will always and always will be ahead of the game within technological developments, I think it will become more of a thing in the future. Right, so I think the first lesson I would say is to not look at south America and think, oooh yes we want to be like them, I think that is instantly wrong, growing up we was told not to compare each other, and it basically works the same way, we just shouldn't compare, because we are different and have grown differently, we produce beef different too, its silly to compare. You know I think if the UK wanted to learn something, it should be to follow a similar method or a way of producing beef like Uruguay did, I really do think they have hit the nail on the head, you know they have a great system, and the understood they could not compete with Argentina or Brazil, so what they did was designed a model for producing beef cattle, but solely focused on all the good bits, or the factors and elements they did particularly well, so in essence they continued to do what they did well and built on the things maybe they didn't do so well, and by doing that they have a beautiful product and have improved their supply chain. I understand me saying this, you know the UK couldn't do that just like that, obviously the Uruguay size is much different, but I think the UK could potentially learn that you don't have to do everything perfect and all this, its ok not to be the top dog, but what you can do is always improve, and by doing that, they will begin to develop again and move forwards.

Education perhaps is another thing the UK could learn, so from my personal experience working in Brazil, a lot of the schools and collages do a lot regarding careers within agriculture and express how much roles and the types of careers that is available, I remember being asked to go into a school to give a small talk regarding the careers within the industry etc, lots of people were interested in what I was saying, and wanted to go into agriculture. So I do think that helps, you know you do get a lot of young people who want to go into agriculture but simply don't know how too, everyone things, oh I have to be born into agriculture to do agriculture and that is completely wrong. You know we want more young people coming into the industry, it needs to happen. But yes, that's another thing I think I would say that the UK could learn. I know certainly, when I was in school we had nothing regarding work in agriculture, and my kids today are the same, its wrong, it's all

*about doctors, nurses, law etc. There is so much value within the industry, the younger generation just aren't taught anything about it. They just see food as something that comes out of a supermarket.*

*Erm, lastly I think what the UK beef industry could learn is, well I'm not sure but I think I will mention it. I think when you look at the finished product on average in south America, and look at finished product here in the UK, our beef is typically processed more, it might be a controversial thought, but that's my opinion, you know I think we have amazing product developers here in the UK, that want to make things as exciting a new as possible, but I do think sometimes we take it slightly too far, it's just too much. You know we can only add so much seasoning and rubs etc, there is no need to reformulate beef products. Maybe I am just old fashioned, but instantly when I went to work in Brazil and still do, I always think to myself, we as a nation here process and work our beef too much. So that's I think is something else the UK could maybe put into practice, everyone is all about health at the moment, and wants everything to be as natural as possible, so I do think it's essential to reduce the amount we process food.*

**Interviewer:** That's really good, thank you, I would of never thought of those things, really interesting to get others perspective on these things. In your opinion, what do you think the challenges are for the South America beef industry?

*Participant: Ok, so challenges range from loads of different things, I think from my personal experience the challenges always stay the same, and this is competition within the industry, it's so hard, everyone is competing for the same businesses, you always have to be on top of your game. I think due to the general south America developing so quick within the beef industry, people/farmers and businesses are developing so quick, they are on a mission and want to be the best they can. Again, related to competition, but price is another thing, your customers will simply buy the cheapest, they will not budge, it is simply black and white, the cheapest producer wins, that's how it goes.*

*Remember I am talking now from a farm manager prospective, so the next challenge I'm mentioning is the power within the supply chain. People within the supply chain have so much power, for example, the main people that have the most power is the slaughterhouses, they are so bad and the amount of power they have in unreal. They literally control everything. Erm so when they give you a price for cattle, the price is not negotiable, it never is, you would not be able to change it. Whatever they set it, that's what it is, no budging. So I think they are certainly a challenge, you have to build up really good relationships with one another to always ensure your on good terms. But yes, the slaughterhouses definitely have it very easy, they are just lucky to have so much power within the supply chain.*

*Also there is so much uncertainties within the world we live in today, like who knew we were going to be in a world-wide pandemic at the moment, it's crazy isn't it. So i think you can never predict what might happen, challenges just appear. Exporting good is a challenge with the rules and regulations changing all the time, it's very hard to keep up, I hear a lot within my business talking about how complicated it is to export.*

**Interviewer:** That's amazing, really good stuff there, excellent content! How do you see the future beef trade of South America, what will it look like?

*Participant: I think the future is bright, I don't think much will change in terms of the amount they produce, they will continue to maintain, and continue to produce at a really nice pace. If anything maybe, technological development will come into the future, and maybe even some English investments, you know. Erm.. I understand trends is a huge thing*

*here in the UK, and always has been, perhaps the trends business could be more predominant in south America countries, I do think generally, south America does follow our trends here, but there is a delay, certainly doesn't happen fast. But yes, generally speaking, the future is looking good at the moment, there producing at a steady state I think and doing generally well. I mean process do fluctuate, but that's the norm with everything you see.*

*One last thing is genetics, erm I have lots and lots of experience within genetics and actually that's what my business currently is. Well what I do is I build businesses up, usually agriculture businesses and I sell them on, that's what I have always done, and that's what I enjoy doing, It keeps me young ha-ha. But no back to the point, genetics is going to be huge, I'm telling you, it will grow and grow, it already is a huge business in Brazil, but it will be much bigger, there are so much benefits that will aid the industry. The world we live in, people will pay to get a breed the correct cattle. and like I said it really is a competitive industry, they want the best possible cattle and in order to do that they use genetics smartly. There is a lot of concern regarding using genetics to breed, but that's with everything, everything is dangerous isn't it. It's about understanding the how this technology can change cattle meaning we will be producing better beef. But no, I get why people are hesitant and have ethical concerns regarding it. But no I would actually put money down, it will certainly be a huge thing In the next couple of years certainly in Brazil, if not Argentina, Uruguay and many more south American beef producing countries.*

**Interviewer:** Absolutely brilliant, I found today very valuable, thank you so much for your time, I know your super busy, I really appreciate your time in chatting to me and helping me understand the industry better. That's it, I don't have any other questions, unless you want to ask anything else or add anything else.

**Participant:** *No I think that's it, no probs at all, I'm more than happy to help, like I said you guys are the next generation, we need to value you guys.*

## **Interview: 7**

**Interviewer:** First of all thank you very much for helping me out, I really to appreciate It, I'm just looking to have a general chat, I have a couple of questions planned, but anything you want to add, I'd be more than happy to listen. So first of all, please introduce yourself, your background, your industry etc?

**Participant:** *Yeah, absolutely. I'll give you five minutes snapshot. I'm originally from New Zealand. We grew up on a farm in North Ireland. And I started to travel when I was going on a rugby trip to South America during my last year of school. That's when I got the taste for travelling ha-ha. So when I went back to home, I went to university and did a business degree actually, it was a lot about marketing and management, quite heavily influenced by agriculture, it wasn't an agribusiness degree, but it had a large influx of agricultural land. And at the time New Zealand was a very big primary producer. After university I went to work in Japan for a while, and then I came back to New Zealand and got a job with a with a local meat company. The cheap beef, venison goats, in fact, that was very export focused and that was really where my interests lie and more of the International side and from there I managed to sell meat around the world for that New Zealand company for quite a few years. And at the time they also had an office in London, for their exports stuff, so they sent me there for a while and I met an English girl, and I am now still married too. So for*

*now I have my feet In both camps. So yeah, I worked with UK and European markets, went back to New Zealand, Asian markets, North American on a range of beef and lamb and then came back to the UK for what was going to be two or three years. And now 15/16 years later, I'm still here. That's when I joined a big British company called country food group, that's when I moved out to North Wales. We had a lamb factory out there doing the retailers in the UK. After there I joined this company called JBS who I'm still with today. JBS has grown significantly as well. So large, they make businesses around the world and growing factories in Australia, I remember trading a lot with South America, especially Brazil, Paraguay, Uruguay and Argentina.*

**Interviewer:** Thank you, that's very helpfu , with your breadth of knowledge of the International meat trade, I think this will be very helpful. What would you say are the recent developments over the last 20 years or so, you where are they up too? What are the challenges south America are experiencing within the beef industry?

**Participant:** *Ok, technology has changed quite a lot Morgan. Especially processing technology and refrigeration and storage techniques. So a lot of the beef we shipped around the world now particularly to Europe is all chilled beef, were 20 years ago would have all been frozen. And that that's happened on beef and lamb. As the demand in the market has changed. To be able to use that meat more readily than frozen beef and all frozen meat has great properties in terms of ease stored for a long time, but the bank accounts, you get it down to minus 80. And you can hold it for a couple of years. But also this made eating quality so much better too. I think the industry grew, mainly from the retailers, they did a lot of work promoting beef. Even when I first came to the UK, frozen meat, even the retailer that sold a lot more frozen meats, you know, we had we had a number of other retailers who sold beef in frozen form, but it was transitioning to fresh.*

*Now you're going to the supermarket, there's a relatively small frozen sections. And large chilled, they were the other way around years ago, and a lot more frozen goods compared to fresh chilled. So the processing technology has improved.*

*With a better understanding of processing technology or the hygiene standards, the dressing standards, the activities in the factories, before my time the hygiene was so bad, people in the slaughterhouses would be smoking on the line and the sawdust on the floor. And then from this packaging companies helped a lot more with the with the robustness of the vacuum packing technology. And I think more and more people maybe with your background with more technical science based people come into the industry that understand what temperature hold storage temperatures due to microbiological levels, what is causing me to last for longer, or go off more quickly.*

*I remember when I first when I first entered the British side of the of the processing industry, I've always been on the importance sort of international side. But what we noticed was we would have dirty sheep and the cattle were being presented for slaughter very dirty. You can imagine, the cattle would have been in sheds all winter so they were very mucky.*

*I would say in the UK, during my time south America was ahead in terms on slaughtering, they were very good, for example the animals got to have a full stomach, you know, you've got to feed them on the track and they've got to arrive in the yards. Then what they would do is let the animals empty out in the yard before they present to slaughtered, this means you've got a much cleaner gut tract, which is obviously that faecal content.*

*So coming back to beef a little more, they claim cattle going in good hygiene standards in the factories, and good investments and chain technology in that process really did help. Shelf at the time was another issue. For example here, you're killing today for boning tomorrow, probably depending on the nature of the ageing profile. But remember in south America, they were huge on exports so had to consider the shelf life, they wanted the beef to last as long as possible. So they really did focus a lot on shelf life, now we'll achieve between 120 and 150 days shelf life on our chilled beef. This is because we have too, by the time its shipped to the port, which can be a week away from where the factory is located, and then arrive to the EU or UK port. The beef is maybe between day 40 and day 50. So then we need to give our customers to eat the product. So yes I would say that's probably been the biggest change in over the past 20 years. Its the transition from Frozen to chill.*

**Interviewer:** That is excellent, thank you very much, such a good insight. And point I would have never of thought about, really good, thank you. What I wanted to ask next was about the challenges that the South American countries are facing at the moment? What are these challenges the industry is facing? Is there anything that stands out?

*Participant: That's a very interesting question, you know, life is not straightforward and every industry will face challenges, and we just have to work through these challenges, and we come out stronger on the other side. I mean, the first thing that comes to my mind is the fact that Brazil have really had a terrible time during this pandemic situation. But that's something that will hopefully in a few months will improve slightly. But thinking now about the challenges as an exporter, for example sending to European markets, the UK market in particular, I think the main challenge we face Is the relationship with the farmers and additionally the price we pay for the beef versus a competitor paying for it and getting enough of the right product at the right price. I think that is very important.*

*Having said this, Brazil are currently in a bit of a lower production phase, it's had very high rates of production, and I think this is down in the recent five years or so, as it been the emergence of Asia as a buyer of beef. That has been the single biggest influence in the past five years. And then from this China's demand for beef has gone from low ish to extremely high due to their own pork population, which is pretty well documented. It is also the fact that people are changing their cuisine habits, they are a little more affluence within their market, but this is not just China, its Taiwan, it's Korea, Japan and their whole Southeast Asian region. And so that's presented another challenge for Brazil, which is the last 18 months demand in China, it has been so high that we've killed the kill numbers in Brazil have been quite significant. And as you know, more than the replacement cycle of capital. So we're now paying the price if you like for that.*

*So the biggest challenge probably in Brazil right now is enough critical mass of livestock to keep the factory running economically and generating. They are typically designed to kill 1000 heads a day. And if you can only source 600 or 500, then that's not economically a very good business. But they say that there's a supply dynamic challenges in Brazil right now too, there's been a big, a big feature there. They have some pressures as there's still very good demand in Asia and North America. In fact, demand in UK, Europe has been somewhat reduced over the last 12 months. Probably for Brazil, it also has a challenge around the perception of Brazil because it tends to get tired. The Amazon region is very topical. And beef production is highly muted within that whole beef and soy. And so there is some sustainability challenges, I would say, in terms of a market perception. And it's a difficult one because I'm very close to it sometimes. I see all the good work that goes on over there all the efforts that are put into place, such as protecting the forests to avoid deforestation. And yet again we constantly have bad media stories about us. You know, the*

*NGOs, like Greenpeace and others that will chip away at that and focus on a few of the smaller parts, but ignore all the good work. So that is a reputational challenges exists.*

*We have a very robust system as we are the largest, we probably are the market leaders, we use satellite monitoring and mapping on farms and properties and there's a lot of cross referencing with government databases, there's a lot of supplier scrutiny and documentation. This is new blockchain technology that's actually just coming into force around trade and traceability in Brazil. We currently do not have a trace system for the birth of each cattle, as its just so hard to manage, but that's what I would like to see in the future.*

*You know, there's 200 million head of cattle spread across the country that's as big as Western Europe. And it's, it's not as easy as in a country like UK or some of the European countries even Australia or New Zealand.*

*I really hope that has given you some sort of insight, into my life and how things happen? I'm sorry I do not have any more time, it's an extremely busy time at the moment, if you have any more questions, please do send them to my secretary, she will pass them on to me and we will get back to you.*

**Interviewer:** No, No, please go- thank you so so much for your time, I'm so grateful to speak to someone like you. It has certainly been valuable, and will most certainly help me. Thanks again. Bye bye.

#### **Interview: 8**

**Interviewer:** First of all thank you very much for helping me out, I really to appreciate It, I'm just looking to have a general chat, I have a couple of questions planned, but anything you want to add, I'd be more than happy to listen. So first of all, please introduce yourself, your background, your industry etc?

**Participant:** *That's no problem at all, I'm glad I can be some sort of help to you; yes so I'm currently located in Kent, and I work in London, well at the moment as you know, everything is all about working from home isn't it. Oh my god, I'm so fed up of teams calls haha, it's my life at the moment. Well anyway for my work I am a technical operations manager, for the British Meat Processors Association. Previously before then, I worked for various meat based companies, and again in technical. And you know technical Is not for everyone, its takes a certain type of people to go into technical. But no, I very much enjoy it, it's my passion, I very much enjoy what I do. For my work currently I deal a lots and lots of different companies, and a lot with the government, you know we apply for lots of grant etc, we try to make sure that the food industry is technically safe. But no, maybe I've made it sound a bit boring haha, but no I love it, it's an interesting role, and I like the fact, that every day is different, that's what keeps me going at times ha-ha.*

**Interviewer:** That's a very great introduction, thank you very much, you sound perfect for my project, I think we're going to have a very interesting chat. Thank you. So for my project I am looking at south America beef industry, I'm looking at all aspects from how they have got so big, to their methods of producing. However one of my research objectives is to look at whether the UK beef industry could learn anything from south America beef production. What can we potentially put into practice, so think this is where you might be able to help me! So first question I would like to ask is how do you think South America have risen to prominence? What at the fundamental factors that have contributed to this, is there any political, or economical type factors that have influenced the sector?

**Participant:** *Oh wow, now then that sounds like such a great project, id very really interested to see the paper one you're finished, sound right down my street ha-ha, and I can imagine, it must be a rewarding process speaking to such great people within the industry. So I think you know, they have always been very much big within the beef industry, if you look back in time, they all started through a lot of English investment particularly in Argentina, but also other countries such as Uruguay and Brazil. And these investments went from strength to strength, and eventually really took off. The investments were used to develop a lot of the distribution services, which obviously helped the beef industry dramatically. Before all of that, south America was all about jerk beef, erm dried beef if you know what I mean. And then after that along came the refrigeration and it all took off. But also the way south American see beef is different, it's very much a domestic market over there, its part of their culture. They have been grown up on beef, so I think naturally that has helped them, they were essentially one step ahead as they were consuming a lot of beef anyway. Whereas you look at the UK, it's just another protein here, I do think essentially in that sense were are very lucky. And maybe slightly controversial, not all of us here appreciate the produce we produce, south Americans have so much appreciation towards the beef they produce. Its two different markets. Erm let me think, what else made them so big, I think politics is a bit thing, a lot of policies and various arguments shape how the industry Is ran, especially you know south America export so much of their beef, and then you have to consider stuff such as export taxes, and various subsites. Climate is another thing that has helped the industry over the years, I do personally think they have the perfect environment for producing beef. It's very much what you want for producing beef, but having said that we produce amazing quality beef here, but they do have the edge, being able to produce all year round grass fed beef on a huge scale.*

**Interviewer:** That is great, thank you very much, and yes I most definitely agree, they really do have the perfect weather, or the climate. For example, I live on a beef farm in Wales, Snowdonia, and over winter we have to bring our cattle in, they really do need that extra bit of support in order to keep them in really good condition. And obviously we do things on much smaller scale compared to farms operating in south American countries. So next, I was going to ask you about what is different about South America's beef production when compared to the UK beef production? And I know we have talked regarding the climate, what else, what differs us? I'd be interested to hear some of your thoughts.

**Participant:** *I think there is so much that is different, it's very hard to compare one between the other, but you know climate is huge, its just made for producing beef in south America, Its amazing, and the cattle eat grass throughout the year, its perfect conditions. Domestic market too, ive mentioned it earlier, but they are very much influenced by culture, whereas in the UK, were considered to be much more trendy in a way, we adopt quicker to trends and south American countries seem to adopt our trends later on down the line. I think here we have a better relationship with our beef, maybe that sounds wrong, but I think from my experience, the way farmers look after their beef is much more personal when compared to south America. And I'm not saying south American don't have a connection with their livestock, but it seems they are more distanced from their beef, we take more care in their attitude and we actually get to know cattle on a one and one basis, whereas the herds are so large in south America, they are just one big herd, so in that sense that's another different, in a way we are very close to the animals. I actually went out to Argentina a couple of years ago with work, and what I found was that they leave the cattle in the fields and that's them done, they leave them to it, and again some people like that factor, saying its natural etc. Where if you look at the UK we check them probably twice a day.*

*Another difference that is most obvious to me is the technology, you know when we look at stuff like packaging and technical aspects, I do think we here in the UK are ahead of the game. Our technology development are very much leading the way, we do have the technical knowledge and the facilities, we are always the ones trialling stuff first etc. And additionally when you walk into supermarket, and look at the variety of beef products I think we should actually be very proud in terms of what has been achieved, you know the range of products are very good. The south Americans are actually not massive on their new product development, I'd say we are very much always on the lookout for the next trend, and we will develop to that trend. Whereas the south Americans keep it natural, they do not experiment so much. Which some people say is a good thing as it's not over processing the meat, but on the other hand to gain a bigger market, product development is very useful.*

**Interviewer:** That's so helpful, thank you very much I really do appreciate it. My next question I was hoping you may be able to help me with, is there anything that the UK beef industry could learn from South America's practices? In particular, what can the UK beef producers and processors learn from South America?

*Participant:* Well first of all I think, it's important that we highlight that they are two very different ways of living and producing, and they are operating on a huge scale, everything is just bigger, you know in terms of herd sizes and everything. I don't necessarily think there is anything that we can learn essentially, they are just very different, weather is perfect for them. I think we do everything well as it is. I think it's just important to focus on what we do well and build from that, I think that's how the best things happen, it's important to continue to develop and build on what we do best. I think having said that, I'm sure Uruguay did something similar where, because they could not compete with other bigger countries within South America, they looked at how they could get and gain more of a market, so what they did was design a scheme, and looked at the stuff they do well, from there they developed what they do well, and now they are doing particularly well. So maybe if we were to follow similar steps and focus on the stuff we do well, that could work.

**Interviewer:** That's a great suggestion, thank you. Now then another question I'd like to ask is, what do you think the future will look like? Is it looking bright? Where do you see the market going? For both South America or the UK? Has it reached a plateau? Or is there more development to be done? What's your thoughts?

*Participant:* Hmm now that's an interesting question, so I will start with South America, I think the future is looking good, I personally do not see it gaining more market share, however I may be wrong. As consumers tend to care more about where their food comes from in the UK, I think it may rub off on the South Americans. There is lots of talk about how we should care more about where our food comes from but also eat ethically, so I think I could influence the way South America operates in the years to come. But you know, they are huge, they are doing amazing, they have amazing systems and are producing amazing beef. People love the fact that their beef is out all year, they seem to highlight that all the time and I think it works well for them. But all in all, I think sales and export sales will remain the same, they will always be huge meat eaters, and the cultural aspects will never change in that way. So they will always be big meat eaters, and produce beef. They are very passionate people, who care about what they are producing.

*If we move on to look at the UK beef industry, I think we here have potential to develop further, we have what it takes to go bigger, but in order to do this, I think we as a nation should try to work together more, we really need to collaborate more, I think we produce*

*amazing beef products here, but In order to get to the next stage and maybe develop further, we should highlight the factors that we are proud of, you know we need to show off what we do well, I think people are big now on eating local, but also sustainable and cost effective, but sustainability means different things to different people, so I think the key is to sell the product and market it very well, you know people want to know where the cattle lived, what they eat, and most importantly what sort of life they had. And I think as a country we really do have the technology and the facilities to do so. So I think we should focus of these elements and deliver on what the consumers want.*

*So I'd say all in all both south America and the UK, the future is looking bright for both, however personally, south America may find it harder, compared to the UK beef industry, this is simply down to their size and also down to how fast they have grown in such a short amount of time. I really hope today's session has been useful to you.*

**Interviewer:** That is amazing, thank you so much, absolutely, I have found it extremely valuable. I really do appreciate all your responses and the opinions. It will certainly help me, and bring a lot of value to my research. I'd like to finish by just saying a big thank you again.

**Participant:** *Thank you very much, I'm really glad it's helped you and you have found it valuable. If you need to ask me any further questions in the future, please feel free to do so, I would be more than happy to help you out, but for now, thank you, have a good day.*

#### **Interview: 9**

**Interviewer:** First of all thank you very much for helping me out, it will benefit me massively having your thoughts and opinions, I'm just looking to have a general chat, I have a couple of questions planned, but anything you want to add, I'd be more than happy to listen. So first of all, please introduce yourself, your background, your industry etc?

**Participant:** *Hello, that is absolutely no problem at all, OK, so I'm currently the regional director for the Global RoundTable of Sustainable beef. I was passed your contacts by hybu cig Cymru, I think did you contact them, to find suitable peoples to interview. So that's how I got your contact.*

**Interviewer:** Ahh yes, I did contact hybu cig Cymru or meat promotion Wales to try find suitable individuals within the beef industry who might be able to give me some sort of insight into the industry, particularly the South America beef industry.

**Participant:** *Absolutely no worries, that's what there all there for, it's great that you got in touch with them. I love it when people get in touch when they are researching, it brings me such joy, it's great. So I will give you a little introduction about myself, so as I said I currently work for the regional director for the Global RoundTable of Sustainable beef, something I feel very passionate about. I have always been involved within the beef industry, and its something I very much enjoy, it's a very rewarding industry, where I get to meet such amazing people, passionate people who want the industry to be better and more efficient, it's great.*

**Interviewer:** That's great, and yes, even from my experience, I have met such amazing people who are really passionate about the industry, and also people who are so keen to help and support my research project. So I think we will dive in with the first question,

how do you think South America have risen to prominence? What at the fundamental factors that have contributed to this, is there any political, or economical type factors that have influenced the sector?

**Participant:** *That's a great question, thank you Morgan. OK, so I think south America is amazing, they do everything so big, the land is exceptional and very beautiful, you really need to get yourself out there, it really is a beautiful country. It has so much to offer, particularly great opportunities within the beef industry. South American have always been passionate about the beef they produce, they value the food they produce, and are very grateful for all the exports they do. It has always been very big on producing beef, you know the slaughterhouses are very big, and maybe this is naughty of me, however I would say they are considered to be very big part within the supply chain, they are very big, have a lot of facilities, they really have a lot of power within the supply chain. So having slaughterhouses who know exactly what they want and acting very proper has developed the industry. I would say people have a lot of respect for the slaughterhouses. Also you have cultural influence, along with economics and politics, they all come into it. So for example, beef here In south America is considered a domestic product, there a lot of cultural influence that comes into producing beef, it's a big business that goes back years and years, it's something they are passionate about, and have always lived with. Another element is the economics, one would say there has been economic issues, for example here the labour wages are much lower, and perhaps that's one of the reasons, or factors that has enables south America to develop faster, and at a very good rate. Everything is much more expensive in the UK, and when you look at the bigger picture it all adds up and reflects the price and even the methods we and other countries use to produce beef cattle. Weather is another factor, we have really good weather, don't get me wrong it does fluctuate, but whereas in the UK you only have maybe a total of month during the summer where you could BBQ food. However here we can BBQ on average throughout the year. We leave out cattle out all year, whereas I'm sure you guys have to bring cattle in over winter due to very harsh conditions, but, it's very different climates, you have to remember that, I think in South America, we know we have it easy, but that shouldn't mean to treat the environment however we want, we need to look after it, and be open to change, and not have the mindset, it was done like this years ago, so this is how we do it today.*

**Interviewer:** That's great thank you so much, what a great start, I really appreciate your input. If we think now, about the differences between the UK beef industry and south America beef industry how would you compare both. So let me word it better; what is different about South America's beef production when compared to the UK beef production?

**Participant:** *I think it's very interesting, first of all they are very different, you know, they export large amounts of beef and have good weather to produce the beef. South America as a whole, when you look at it from an agricultural side of things, it can be said that we are actually quite specialised, you know it can be said they are specialists in producing very high quality beef that everyone's loves. Whereas when you look at the UK, personally, I think it's very diverse, very much not focused into one industry, you know it is very broad. So personally when I think of South America I instantly think beef, where as when I do the same about the UK, there are so many different elements, they do a bit of everything. And I do think that's an interesting thoughts or even a concept, that's one big difference. Another, as I mentioned earlier is the weather, you know, perfect conditions for producing good beef, but also the UK produce amazing beef too, so it's interesting how both do good beef, following different methods of agriculture. I think beef here in South America, or the beef industry, people see it as a 'good' industry to get into, does that make sense? I think its seen as a good job, or a good career if you go into producing beef, and particularly*

*doing it well. Whereas in the UK, I think the mindset is changing, I think we need to be more open about the various roles there is in food and agriculture, the industry is very diverse and has so much to offer, from genetics, all the way down to new product development and processing of this meat. We are very lucky people to be involved in such industry.*

*I would say in terms of stability, maybe the UK has better procedures and policies in place, they are very much switched on, and sometimes when I think of different aspects of the meat industry, that is one think that differs between the two. They seem to be one step ahead in terms of technical issues etc, where maybe south America is just not quite there yet.*

*In terms of processing I do think south America countries are very good, especially in Argentina, they are absolutely huge and they really do have the best of the best in terms of facilities, so in that sense they are very good. And there power is very big too.*

**Interviewer:** Really interesting, thank you very much, I really appreciate it, this is going to so valuable towards my research project. My next question I'm interested in asking is in your opinion, what do you think the challenges are for the South America beef industry?

**Participant:** *I think price is a big challenge, the price fluctuating is considered to be a challenge, recently its up and down, which can make things difficult. We export huge amounts, so should anything happen to one of our exporting countries, we would struggle and I think that should be considered as a challenge within the industry. For example, look at China, the amount we sent to them Is scary, they take so much of our beef, however should something happen to china we really would struggle, we would have all this beef, but no one to take the bulk of it. So I do think we need to appreciate the beef china are taking, it is amazing they take so much. We value them so much. This is just the way it has always been, we don't know any different, but we should be have some sort of back up.*

*Another challenge I would say, is in order to gain more of a market, everyone wants cheaper beef, in essence, the cheaper beef always sells, countries that we typically export too, aren't really that bothered about where the product comes from, but there more into the price. Whatever is the cheapest they will take. And I think with much lower costs here to produce beef, that's why we have developed to being so big within the market. Stuff such as labour costs, and producing beef that's more cost effective, also here we don't have to put our beef inside, they can stay out all year which is more cost effective. It all helps I think.*

*Another element, that I think that's important to mention is Brazil, they get very much bad press regarding the amazon, and I think that is definitely not the case, never listen to it, its so bad what the media can portray. Brazil is actually a very green country and they are certainly not ruining the amazon, they are protecting it. But I think, going back to my point, the challenge within this problem is ensuring that the pubic and consumers are aware that Brazil as a country are doing all it takes to protect and nurture the amazon. There are also many schemes in place to ensure we protect the amazon. So I do think we need to ensure and get the message out to consumers and customers about the stuff we have in place all in order to protect the huge and special amazon.*

**Interviewer:** That's really good, thank you very much. Now then, to finish the session How do you see the future beef trade of South America, what will it look like?

**Participant:** Right, so I personally see the future for south America beef industry very bright, I do think due to the size of industry and just generally the way we operate, we particularly may find it hard to grow bigger and develop as fast as the UK might find. This is all down to the natural size of the industry we currently have, due to it being so big we will find it hard to grow, as it will take so much momentum. However, looking back at the past, meat has always been such a big thing, and I say this as culturally, you know it is a big thing. People have always eaten meat.

In addition to this, there is a lot that is being done in schools here, especially in Brazil, where they have guest speakers that come into schools, where they talk about the diverse careers that's available within the agriculture industry, so personally I think this could help the beef industry recruit more young professionals. It's a really good industry to be involved in.

So I think it really is safe to say that the industry future is certainly looking bright, and will continue to be a great industry supplying countries with amazing quality beef. I really hope that this has been some help and support to your thesis. I do think the most important thing for you to remember is the fact that south America beef industry is huge, they have everything in their favour, for example the weather, climate etc. So perfect climate to produce beef. But yes, if you need any more support or have further question, please send me another email and we can set up another teams call.

**Interviewer:** That's really good, thank you very much, I really appreciate it. And I'm sure I will take up that offer, I'm sure I will have a few questions whilst writing up my thesis. Ok then, well I will finish this interview by saying a huge thank you for your support, I really do appreciate your time, and I know your super busy. Thanks again, bye bye.

## Interview: 10

**Interviewer:** Good afternoon. First of all thank you very much for helping me out. Hello. How are you? Are you well?

**Participant:** Not too bad. Good, good. Very busy at the moment, trying to sort out some grants for some pig farmers, ha-ha.

**Interviewer:** Oh god, well thank you very much for your time today, thank you very much for agreeing to participate. I really appreciate your time. And I think it will add so much value to my research. I'm just looking to have a general chat, if you're happy, are you okay to go straight into it? So first of all, please introduce yourself, your background, your industry etc?

**Participant:** Yes, sure lets go, no problem at all. OK, so first of all my interest in South America came about when I was at few year younger ha-ha. I was heavily involved in importation from around the globe, the head office was based in Birmingham. And I did a lot of importation from around the globe, that could be Australia, New Zealand, South America, etc, etc. A lot of it traded on to the food service industry. But the biggest users was always manufacturers/the food service industry, and it was all beef that came outside of the European Union. So they in essence were very much heavy users. So yeah, traditionally, that's where a lot of it will go. And, at the time, way, way, way back for the barbecue season. It's really important, you'll find out this when you go to a ABP, but balancing the kill. Yes, that's called carcass balance. So you buy whole animal. And we are

*one of the industries that take it apart. And you have to get rid of anything you don't sell, or put in the freezer, or you sell, anyone can sell anything too cheap right? It's simple. Yeah. Because you're giving it away. And the idea is obviously when you purchase, is to sell everything for the maximum profit. You can. And so, in the summer, the steak business, yeah, in the UK, for the retailers, has grown, obviously, over the years, barbecues and eating out and all that sort of stuff. Therefore, that puts a lot of pressure on the sirloin. But listen, if you've got money and you wish to barbecue, the main cuts are rumps and sirloins. So you can't keep killing cattle for hind quarter cuts, right, and the rump. So that was a challenge in itself. So what I would say is balancing the kill is very important, and that was something very hard to do for all the retailers at the time. And obviously, when you go outside of the retailers, there's a lot of other venues that would like and do sell barbecue steaks on, you know, festivals wherever it may be. So in essence, it takes logical skill and planning, as you will see working for ABP.*

*Therefore, my first trip out to South America was on behalf of one of the retailers to source beef as in strip loins also loins and rumps. That's all we were interested in to supplement that summer volume. I went to Argentina and Brazil to a number of different factories. I went out for a couple of weeks. That was my first trip. I've been loads of times. But that was the first trip and you know, there is a distance difference you being a cattle man will understand, Brazil 14 degrees Celsius. Yeah. Then you come down below into Argentina. And then to the side you've got Uruguay, Paraguay and so on and so forth. It gets cooler. And they are completely different breeds, as you know. So, Argentina and Uruguay, for instance, are just full of Aberdeen Angus and Herefords. They are the quality animal as far as those countries are concerned. And that's what they focus on the two main breeds and they market that beef off the back of those breeds.*

**Interviewer:** That's really good, sounds like you have such great experiences within the industry, that leads me on to one of my next questions, and that is, how do you think South America particularly Argentina, Brazil and Uruguay have risen to prominence within the beef industry?

**Participant:** *Yeah. That's a very interesting question. The first thing that comes to my mind is these countries are ran differently, and I think that makes a big difference. And the importance, that beef is as a commodity for exports, foreign currency, etc. Plus quite a lot of what they do. They're not killing the rainforests, there are factual incidences of them cutting down the rain forests for cattle grazing, that's all in the media, and that is bad. But that doesn't happen. I mean, obviously, Argentina and Uruguay, because there is no rain forests there as such, so there is a distinct difference in breeds as well as climate as well as what people do. And what the government shall we say, turn a blind eye to in some respects. Okay. However, all of those countries down there, eat beef, like at least five times a week. Yeah.*

*That is definitely a place where I can live. Beef is one of my favourites. Although I have lamb for this weekend. But, you know, that consumption, domestic consumption in somewhere like Argentina, the government regulated in respect of, you know, you can have rioting in the streets if, if they've exported too much beef and they're running a bit short. It's a big, big, big protein staple. Uruguay is very similar. However, Uruguay, there's 12 and a half million cattle. And there's only three and a half million people. Okay, so there is plenty to go around. Beef plays a massive part in people's diets. Huge integration between Portuguese with fish. So yeah a massive part of that. In Brazil, Argentina and Uruguay the beef is usually considered to be better quality. I think people do say that Uruguay do have the best beef generally, in terms of quality, but I'm a big believer that you can have good beef wherever you go. I mean Uruguay, will argue as far as they're concerned that their*

*beef is far superior to the boss indicus that they have up in Brazil. At the end of the day you're not comparing like for like, here, they are a different animal. They can survive at 40 degrees in the middle of a field. They don't need trees. Yeah, you put an Aberdeen Angus here and they dropped dead. So it's, it's a very different climate, it's a very different product in some respects.*

*Number two, there has been a lot of government support, there is, you know, the vast majority of their population live, you know, day in, day out on beef, one shape form or another. And they've put a lot of work from a breeding and farming point of view as well as huge industrial abattoirs. So your unit cost of production through an abattoir is a lot lots more. From my experience I've been to some abattoirs that kill 3000 heads a day, It's a very different setup. For argument sake its twice as long, you have twice as many people, therefore you run it twice as fast, I would say it is very efficient.*

*Here in the UK, slaughterhouses process meat much slower, for example they would kill on Monday, then Tuesday would be the day they pack the chilled meat, so in essence, you are behind before you even start if you get me. So efficiency and scale of the industry is important to keep in mind. That's why at the end of the day, plus labour, they don't have, minimum wage and all those labour or the legislation around labour hiring, firing is completely different.*

**Interviewer:** Thank you very much, there's very interesting points there, very valuable indeed. What would you say contributes to the sales of South American beef? What are the influencing factors that help south America sell beef?

**Participant:** *Well, you know, when you go to trade fairs around the world, they will have stands, you know, we don't have stands as such, I mean, we're net importers of beef, we do export beef, of course, the stuff that we don't want or don't eat, or it's the dry aged or it's the premium. Most of that is for domestic consumption at the end of the day, so it's important to understand that it is for domestic consumption.*

*Is a massive industry, so they put money into it at the end of the day. And they promote that, you know, black Aberdeen, Angus, or Hereford this or that or whatever, around the world for marketing that product. Agriculture here, you'll hate me for saying this. As far as the government is concerned, it doesn't really count as a big revenue earner. You know it's not tiny, it's absolutely tiny. And the stuff we do export is all the stuff we won't eat here, it's for domestic consumption. We export things like all the diaphragms, the livers, all that sort of stuff. This is because it's simply not part of our diet anymore.*

**Interviewer:** Ok that's good, that was a very good answer, next I'm thinking, how does south America beef industry compared with the UK beef industry? What's your thoughts on this?

**Participant:** *I mean, one of the huge differences. For instance, when we bring the cattle in for six or seven months, depending on where you live, and everything else, yeah, they don't have to do that. In South America, they're out on grass, 52 weeks of the year. They don't need to do but they're almost organic. If you think about the winter, they don't really have any snow, frost etc, so climate is a big difference indeed.*

*I'm trying to think what is the difference about the beef industry, let me think. I mean you can't really compare, there very different and its mostly down to climate.*

**Interviewer:** next question I had in mind was, to ask you, is there anything we here in the UK can learn from South America beef industry? Is there anything we can put into practice?

*Participant: Yeah I think there is always stuff that we can learn, I'm a big believer in developing all the time, and always improving processes etc. One thing that pops into my mind is when I walk into a fridge in South America, Argentina or Brazil, the sides of beef hanging are like peas in a pod, they literally look exactly the same. They're very similar weights, very similar conformation, fat levels, etc. So, I think consistency is something they are bloody good at. I'm not a farmer, so please don't ask me how they do it. But from my experience, they really get consistency in terms of yields and all other stuff, they are consistent all times, which one would argue the UK isn't.*

**Interviewer:** That is brilliant, very helpful thank you, next question is about the challenges, what are the biggest challenges the beef industry in South America are currently facing?

*Participant: Ok, so I'd say cutting down the rain forests and all the other stuff in Brazil is a challenge you know we should be looking after our environment, its precious. There is the carbon footprint. Having said this I do think a lot of it is a myth, just stuff being reported badly. You also have stuff such as tariffs, there huge, and because of this, that's why restaurants buy the beef, because it works well with tariff. Another thing is the cost of production, its completely different to what it is here now.*

**Interviewer:** That's great, really interesting thoughts, what I want to ask is, tell me how the future will look like?

*Participant: I mean, meat consumption here in the UK went up last year, year on year it went up. Yeah, we had to cook at home. We didn't have any choice. But I find it with everything going on and everything in the media, it's crazy how meat consumption has gone up. So if it was that bad, from a health point of view, from a climate point of view, and all that negativity that kind of has been circulating around red meat as cattle, pigs and sheep, why has our consumption gone up. But when you go back in time, we weren't growing wheat, we were killing animals. I think future is looking good, meat consumption will still rise slowly. We will and always will eat meat, so as far as I'm concerned the industry should not worry.*

**Interviewer:** That's amazing, I have no further questions unless you would like to add anything, about anything we have covered today?

*Participant: No, I think that's it. I mean your project sounds really interesting. I would be very interesting to read it after you are finished. It's really interesting.*

**Interviewer:** Yes, well of course, I will send a full copy once everything is handed. OK then I will finish, just by saying a huge thank you, I have found this session extremely valuable, it really has helped me, and will help me whilst writing my thesis up. Thank you very much.

#### **Interview 11:**

**Interviewer:** Please introduce yourself (your background, your industry etc)?

**Participant:** Hello Morgan, well I am a principle researcher, based In Uruguay, on top of this I have my own consultancy business where I consult various companies, helping them to get better a what they are doing, whether this trying to get the company more cost effective, erm.. be more sustainable, or just generally get better at what they're doing. I help the companies on all aspects of their business. The I'm also a principle researcher, based at an organization here, where I mostly my research is all to do with agriculture, agri-food, how our food is produced, how they differ, how people produce differently. I guess its interesting what I do, I really enjoy it, it's very diverse, where my research role is more about sitting at a desk, and on the other hand, the consultancy is much more practical, where I go out to visit companies, actually seeing what is happening within those business, then go home and design a business plan for them. I really enjoy the consultancy as I get to see companies flourishing, and progressing which makes me very happy.

**Interviewer :**That's brilliant, really good introduction, thank you very much, ok so if its ok with you we will go straight into it, I want it to be more of a conversation rather than a formal interview; so first of all, let's start off by diving straight in, tell me your thoughts and opinions in terms of how has South America as a whole risen to prominence within the beef industry? What do you think? What's your thoughts

**Participant:** Yes absolutely, let's dive straight into it, right well what an interesting question, well if we go back in history first, historically, beef has always been a part of the South American culture, it's something they have always have, and then people ask, well why have they just had beef? Why was it a big thing? Well first of all it's a culture thing, its something we have always produced, going back hundreds and hundreds of years, we have always have beef cattle. Another point, is that it is a commodity product, you know, it was considered to be an easy way for us to make some money, and make a living, so we would sell beef and make some profit, and it all went for one extreme to the other. It became a big thing, and it was something as a continent were doing very well. People always ask me, but why beef? What made them focus on beef so much? And this is what I find so interesting. So, here in South America, well I'm based in Uruguay, but we have the climate, we have the perfect weather for producing beef, this is bang on what we need to make and produce good beef, so in theory we are always going to be one step ahead of the UK, the weather is just here. Another factor is the way we use our land, the land is perfect for beef to be grazing, we can keep our beef outside all year, we don't have to keep them inside so again we are keeping everything as cost effective as possible. If you look at the UK, you guys have to bring your beef cattle inside over the harsh winter conditions, as they wouldn't cope outside, there simply is no food for them, whereas here there is plenty of food for them all year. And then from this, the idea of international trade specialization came about. The whole idea that we, us South Americans are focused on one aspect of agriculture, just one aspect, I know we have a range of other agriculture that goes on here, but I find it interesting that it is mostly dominated by the beef industry. And then when you compare this to the UK for instance, you have a range of agriculture, but I wouldn't really say they specialise in anything, more of a jack of all trades, don't get me wrong they are very good at what they do, however there's not one part of agriculture that they specialise on unlike south America.

**Interviewer:** that's great, thank you, how do you think south America have grown so big within the beef industry, what's made them risen to prominence?

**Participant:** Well I think we have the climate, the weather and the correct land for producing beef, and then things just naturally develop don't they. We can all produce good beef, but not everyone can do it at our costs, and people ask why, and the answer is simple

*we have the natural resources that is needed to produce beef. We can keep the beef outside all year and not have to spend on keeping them inside, they are very much independent animals to us you see. Erm, other factors include, domestic product, it's a culture thing, we have always consumed beef, its in our blood, it was a commodity product, it still is in some places, and then we have just ended up specialising in it, it's great. The word has gone around and now we exports huge amounts which the region depends on for an income, our economic situation would be very different without out beef industry. We also have stuff such as investments back in the day, they helped and supported the industry very much, many businesses helped the infrastructure, this meant they were able to build better infrastructure, for example better railways etc.*

**Interviewer:** excellent, that's really good information thank you. Ok next I was going to ask you, do you think we here in the UK have something to learn from south America? What can we learn?

**Participant:** *Hmm that is a hard one, nothing really comes to my mind I think both produce really good beef, personally I don't think there's much to learn, especially from each other, we are very different.*

**Interviewer:** That's fine, no worries. How do you think the markets differ between the UK and south America, focusing again on the beef industry, how do they differ?

**Participant:** *I think we have much more exports that's the biggest difference I think, we focus much more on domestic markets, which is good, and that's what brings us the income isn't it. If you look at the GDP of each south American country, and compare it to the UK you will see so much difference in the percentage. We have rely so much more on the beef industry for our income, but even more importantly for food security, both regionally and globally, we provide so much for the region and the world, it's something we are very proud of.*

**Interviewer:** That's a great response, thank you, I'm finding this really valuable, right my last question I promise, I know you're going straight into the next meeting after talking to me. Lastly, what do you see the future looking like? Is it bright?

**Participant:** *No worries at all, ahh thank you, sorry I didn't have too much time, so the future, well yes, of course it will be bright, it always has and always will, many people depend on south America for their beef simply because they cannt produce it in their country of for other reasons such as no land etc. so we will always have that side of the business. But making us even stronger is the whole fact that we have cultural influence and all that, we will always be consuming beef and always will, it very much is a cultural thing. So on that note yes we have a bright future ahead of us. Many people aren't sure if we will develop and grow bigger, simply down to competition within the industry, and this is fair enough, it is hard.*

**Interviewer:** Well, thank you very much for your time today, I really has been very valuable, i think that's all my questions, thank you again, I won't go on, I understand that you are running straight into another meeting. Therefore thank you very much, brilliant, it's been a huge support. Thank you!

**Interview 12:**

**Interviewer:** Please introduce yourself (your background, your industry etc)?

**Participant:** *well where do I start hahah, so I work for a meat company based out in South America, Brazil, I am senior within the company, I will not name here. Prior to that was working at other meat based companies, producing meat based products, mainly all beef, some other proteins too. Growing up, I have lived on a beef farm myself, my family farms beef here in Brazil, we very much like it, please note its not a huge farm but I guess its something right, we do it more as hobbies rather than full time, and even doing it part time it still works well. Erm my past, I have always been interested in food, the way it is produced and consumer insights and behaviour and stuff like that. I just find it so interesting. I think that's it, nothing else to report in terms of my past. Its been very much orientated around beef, I have much interest in all of the supply chain, particularly the beef supply chain.*

**Interviewer:** That's amazing, sounds like a great experience and thank you very much. The perfect person for my Maters research project. OK. So moving on, tell me first what do you think about South America as a whole in relation to the beef industry? How do you think they grown so big? What do you think influences it?

**Participant:** *well I think south America is an amazing region, it really is beautiful, if you every get the chance to visit you must come, I could probably give you good recommendations of places to go and stuff to do. It is a region that fully utilizes its natural resources you know. They use their land to the max, without over using it, they are clever people and know how to produce good quality beef, especially Uruguay, they have a very good reputation for producing quality beef- they also have very good production systems also. Erm looking at Brazil, where I am, we have a lot of bad media and bad press which doesn't help us, we are always battling against these, it just makes us look bad, but in reality we are very much green, people here do our best to help the environment, but also produce beef as sustainable as possible. Erm, what can I say about Argentina, they are very good, everyone loves Argentina, beautiful country, very much known for producing beef, very friendly people, I think I would say they are the most well-known within south America for producing beef.*

*I think in terms of how we have grown so big, I would say it's mainly a cultural factor. Here we have always consumed beef, its something we don't know any difference. So I think the cultural aspect has helped massively. Also domestic markets too, we exports huge amounts as you already know so that helps us, we would not be who we are today without the exports we have. Back in the day and for some parts of the region, beef is a commodity product, many people rely on beef, so I think that tradition has stayed with us and its just always will and always has been a part of our lives. Other factors include stuff such as climate and the weather, something that works well for the region, we have stuff like the natural resources to produce beef without us spending extra money on it. We can keep our beef outside all year round, something the UK cant do. I hope that gives you some insight.*

**Interviewer:** Absolutely yes, that's great, thank you, what do you think contributes to the sales and the growth of South America beef? What do you think? Why? Why is it so popular? Why is it? Why is it doing so?

**Participant:** *For me personally, its culture, it something that stays with the region, also word of mouth, it's the same with everything, the word goes around. We can produce the volume, we are reliable, we produce good quality beef, I do think its as simple as that. But like I mentioned earlier, culture, domestic markets and it being a commodity also influences it.*

**Interviewer:** That's great, really good suggestions, so on your last comment there, where do you see the future going? What will It look like? I know you mentioned it is looking bright?

*Participant: For me personally, it will be a bright one, however, I do see us finding it hard to grow, I think we will still do amazingly well, but we will find it hard to develop and grow the industry bigger, and my reason for this is simply competition, customers will simply go for the cheapest beef, they are driving the prices so low, and this is what will influence the industry.*

**Interviewer:** That's interesting, thank you, so that kind of leads us to my next question, one of my research objectives is to look if come the beef industry in the UK, learn anything from the beef industry in South America. Is there anything that we could put into practice? or what's different between both. Is there anything that we can learn?

*Participant: Hmm.. personally, no nothing at all. Its two very different industries, us here and the UK is smashing it, its hard to compare the both due to us being so different, I hope that makes sense? And you have found it helpful?*

**Interviewer:** That's great thank you, and I think that's the end of my questions, do you have anything else you would like to add, or any comments about anything we have talked about today?

*Participant: No, I think that's it, I hope I have been some help to you, if you think of anything you would like to ask me, feel free to give me a call or send me a text you have my number, and I will do my best to answer, or if I can't answer I will always forward it on to someone who may be able to help.*

**Interviewer:** Ahhh, that's great. Thank you so much, this is been a massive help and it will add so much value to my project and that's all my questions really. Unless you have anything else that you'd like to add, I think that's it, I'd like to say thank you again, I really appreciate all your contributions.

### **Interview 13:**

**Interviewer:** Please introduce yourself (your background, your industry etc)?

*Participant: Hello Morgan, thank you very much for asking me to be part of your research, I feel very excited and happy to help you. so introduction, where do I start, so first of all I am a managing director for a leading food manufacture in Europe, dealing a lot with beef and beef products which should hopefully be helpful to your research. I started off being a technologist and always into food, knowing where food comes from and how it is processed for human consumption. I think that's where it all started and Ive just worked myself up the ladder, so yes that's a short bit about me.*

That's great thank you, very interesting, my first question for you is, how do you think agricultural products differ from south America to the uk? You can focus on the beef industry should you like? What do you think is so different about each other?

**Participant:** Well first of all the first thing that comes to my mind is international trade specialisation, that's something we do very very well, we have all the resources we need to produce beef, not only for ourselves but also for the world. We are lucky to have the natural resources, the weather is so warm and great for the beef. This means we don't need to spend more money than we need to, we have everything here to produce good beef. In the UK they have lot of different agriculture, but I can't think of something they specialise in, maybe this is me, but I think the uk focuses on lots of various aspects of agriculture.

**Interviewer:** That's great, thank you, its very interesting isn't it, this leads into my next question, and that is what do you think we in the UK can learn from south America? Is there anything we can learn or maybe put into practice?

**Participant:** Hmmmm... now then that is very interesting, I think for me in terms of beef itself, we both have very good quality beef, and we both know how to produce good beef and even sell it, we obviously focus much more on exports etc. I think it is seen as a good job here in brazil if you go into the beef trade, everyone is wanting to get into the meat industry and its seen as something good; personally I haven't seen that with the uk, which leads me on to suggest perhaps more talks and education on why its such a good industry could be a good thing for the UK. Hmm it's a hard question, let me think what else. Id say we do a lot more genetics compared to you guys, its something that is very much the new trend here; although having said that im not a big fan, its not natural is it. Its not my cup of tea.

**Interviewer:** Amazing, really good points there, thank you very much. What do you think contributes to the sales of south American beef, is there any trends you can identify or tell me about?

**Participant:** OK, well the first thing I can think of is we always eat beef here, my family love beef, when I was a little boy I was always eating beef, my parents were the same, they would always depend on beef. And I think that shows us how much we depend on the protein, we love it. It's a domestic product, it's a commodity, and it's a commodity because we have always had and always will have the resources to produce it. It really is excellent. We also sell a lot for domestic markets, and again something that differs from the UK. You just wouldn't see all this in the UK and that's what makes us so different, but the biggest point I think you should take is the fact that it's a commodity and a domestic products.

**Interviewer:** Excellent, thank you very much, that's really good. Last question now, I know you said that you only have a 20 minute slot, so I won't keep you too long now, I really appreciate your time and your answers. What do you see the future looking like? What will the future of beef look like in south America? Will it get bigger? More development?

**Participant:** Hmm... I think yes it is looking goof towards the future, it will always be a big industry, it's something that has always done well and always will do very well. I do think we might find it hard to continue to develop and grow bigger, simply due to the competition we have, also pressure from the media. But no, over all it will be a positive future, well that's all we can hope for isn't it. If we all continue to work hard and do what we can for the industry, then we will be in a good place. I'm so sorry I didn't have too much time today, I have to dash off for the next meeting, but I'm very happy to be part of the research, and in the future, let me know anything else you may want to ask, I'm only one email away. Thank you very much Morgan.

**Interviewer:** That's brilliant, and no no, you go the next meeting, I have found the session very valuable, thank you again. Have a good day. I will ensure you get a copy of the finished research, but for now, thank you!

### **Archive Material interview transcripts:**

#### **David Walker**

Well, my Gran father, my name sort of LD, will come. Lewis was the name family name and I was born. In the village where my Gran father lived, just because I'm my mother went back there. My Gran father was a farmer and a butcher, and he was burnt ordeal Litchfield in Staffordshire. And the family had been there for generations. We can trace the family back about five generations directly and is recorded in the family Bible. My father left, burnt. Wooden was invented to medicine in Bristol in the West Country and. I actually was left school, went to medicine but fails second MBA and had to go in the army into two years National Service and at that stage I thought I had exam nausea. I was fed up with end of term exams at 11 plus exam and then school grammar school, end of term exams and then I did Oxford metric and I wanted to go to Bristol to study medicine. So I had to do Bristol metric. Anyway, I drank too much beer and play too much rugby and fails. I can be well. Then I had to go in the army to do two years national service. I took the decision. Well, I was in the army but I was going to see the world. And through the army through resettlement, I got commissioned in the army. Who went through moms often at school? I was off for two interviews in the same day. In the morning I went to British American Tobacco Company and they said Yes Walker will give you a job. You'll go to Rhodesia as it was then you grow tobacco and you'll stay there till you're 55 and this other company, the rest. The organization said he is. Walker will give you a job, will take you on as a trainee executive. We will send you for three years training either too the Argentine, Brazil, New Zealand or Australia and then bring you back. And this was exactly what I wanted to see the world for three years and then come back to England. So I jumped at it and it so happens I was sent to Australia. When I went home and told my father what I've done. You literally hit the ceiling and he said, well, well, well. Who is this company? And I said always a company called Weddle's, part of Union International. I didn't know it then is investing company. And he said, did I realize what I've done? I said no except to upset him, and he said, well, you turn the counter family back a generation 'cause I left me Amanda medicine and you left medicine and went back to me. He did live long enough to see me telling Mickey and Milkings Bonita mean so he was proud and pleased with me at that time. But my Gran father lived long enough to come when I was factory manager. Harris is acharnon wilcher. And I was very, very proud to show Imran Khan because at that time comma was killing 1300 pigs a day and it was compared with Denmark and the Danish kills. Well, it definitely was the biggest pig killed in. In England at that time, so that's how I came into meeting this trend, and that's I just literally went back. To my roots, but I did it for a different reason, little choosing to go back to my roots. I did it because I wanted to travel. No, yes. When you my grandfathers background very well because. I threw my school holiday life. I went back to Brentwood every summer Holidays. End. I was very, very aware of the rural background and the the meat inside of the family, Interestingly enough. The genius in my family was my grandmother. If you can imagine a village outside Litchfield, but one time my grandmother. I had Grocery shop butchery. Shop's shoe shop. Bicycle shop. I mean, she virtually controller village. She was a very successful businesswoman. She had three sons and a daughter, and when you think back to the time the 30s, it was incredible that every one of her children, their wedding prison was their first home and I want said to my father, you never known what it was to have a mortgage. I mean, I always think that that. It was incredible for a business woman to do that. And I'm there in families. There's a lot of hearsay in legend, and he was said that the Warsaw Coop tried to come to the village of Burnt Wood and my grandmother and beat them to it. And I went away again. There are also stories that in the. The Big Depression and the miners strike because Burnt Woods on the edge of the counter coalfield and she gave a lot of credit to families. She wouldn't let them have fancy cakes. This is all repeating family legend, but they could have bread, butter and jam. And she used to give them credit and it is rather ironic. The wind strike is over. She never did get paid back all that money. Like that was another family legend of the time, but she was a very successful businesswoman. And. I'm sure that my success in business probably genetically came from her. Her

maiden name was Shelly. And she came from Stoke on Trent. In the preferred somewhere, when I'm not very sure on that. Then I suddenly David Walker, my father was nearly Charles Walker. My Gran father was the lean to John Morgan, my great Gran father was Lily. Abraham Walker. My great, great Gran father was really plays of Walker. And. I I had a daughter. So I broke family tradition, but Sarah, my daughter, is a very was a very very good business woman. She came into my business eventually even though she never worked for me. She work for one of the Managing Director is one of my other companies, but she was very very successful as the brand manager for through the Big supermarket companies as their own Sainsbury's. So probably even she's got a chip off the old block. And she certainly not. She was very successful. So successful with. When she retired and she retired because the grandchildren and she received a letter from Sainsbury's of Blackfriars and when you read that letter is like a testimonial saying how well she looked after the account, would you ever issues ever in London when she come for lunch, etc. And I know. I mean, I know because of the reports that came back to me that are standard of work and their controller work was first class. That's lost in antiquity. He lost it I. I mean, there was all sorts of talk about. The fact that it goes back to the move medieval times in French, but I mean I've never had the time or angulation to trace the family right that far back. So I don't know the reason romantically, yes. People say Oh well, it was a French connection way back, but I've never been able to prove that I couldn't disprove it. All I can tell you is that for five or six generations the elders the eldest was called Lily. What's your Gran father? That went back at least. One generation before him. That's all I know. That's all I know. And then he went back one generation before him. And like all small farmers. He was quite big in Pinks. They will Kathleen Bowl, but he was being pigs. So I I mean, apart from that I don't know. And I know that they killed all their own pigs. My earliest memories of it is playing out in under. Playing. Crying in the shirts. And actually, one of the things that the memory of mine is a greenhouse. That he had another. This fine when he's big black grapes. And nobody should touch those grapes. And the religious. Control over the fire, which it goes in the greenhouse in the column could color days and it was a cold fire. We slack cold. Remember cold. It was all a small base. Houston downtown. And then there's a funny thing that the strongest memory is the memory of the greenhouse and the grapes in this greenhouse, and I'm not sure what happened. All those crates, because I know his grandchildren if we touch them, we were in dead troubles. The other thing, of course about that time was Litchfield Market. My memory tells me that was on a Monday. I'm going to the market at least feel like remember being. Small boys, your trousers. And I thought it was such a great thing to go down there and help load and unload the cattle and pigs and stand around the ring and. Listen to the auction earring. I remember that very clearly. Please feel market. Because now the markets come from the central. Edgefield is somewhere uptrend Valley. But Those are my youngest memories. My youngest memories are the farm. Green as the. Going to market on Monday and my grandmother and my going around the shops with my grandmother. We were very old fashion shops by our standards. Now I recall a very very high counter. I recall a mixture and the smell. All the sweets and the groceries. Unfolding blue paper banks for sugar because sugar was loose. I remember being cancer bathroom level Granny pulling a piece of greaseproof forehand and taking big flat spatula knife and cutting off better and way it indeed in my kitchen today I have got one other scales out of one of the shops. It's a Burkle scale, and when I'm many years later. When I was in business in Milton Keynes. But this vertical scale I asked the because we used modern load cell scales and I somehow or other burkel work. Involved and I said well, they renovate and rejuvenate the scale for me and I remember that the technical man was so impressed that I had this scale that it went back to Birchall and it was renovated and they had to make a new scale for the needle to go against. And that's one of the few sessions that I've got from my grandmother shops here now in this house. I just removed my biggest memory of the grocery shop was the smell of it. The smell of all the groceries list weights and. Sound of the shop now because. Can you you probably remember the girls were on the spring and the Clapper was just touched when the door opened and that made the shot Bell ring and my memories of my grandmother no matter. Even if she was in the middle of a meal, she never had a meal in peace 'cause the shop building and she will get up and go into the grocery shop. Because the other thing was that the way of the design of the place in the houses in those days, you walk through the shop and there was a door when you went upstairs to the bedrooms. So you went through that shot like this morning. But those are my memories in my granny, jumping up when the shop Bell went and serving people who came in from the village. I don't think I can describe the smell, just the smell of sweet smelling groceries. Nick Jonas

and Suites on one particular show. No, I can't describe the smell. It was announced this morning was a nice man. Maybe just my little grocery shop. My favorite sweets Carol's, I think. Camels. Story with you. I had a cousin who was rather naughty and as we walk through the shop at night to go to bed, used to pin some sweets. Granny could never find out how he was doing it, 'cause she could never find the evidence. With somebody, somewhere today in a junk shop or in an antique shop, there's gotta brass bedstead. And if they unscrew the brass and over the top and look down in the tube with the head of the bed at the foot of the bed and find his stuff with toffee papers. Dude, that was how he did it. Live a good days. Happy days. Three days of playing in the Sun, playing in the hand. Folding in the sheep dip. I remember that. Because of. They had gone over the sheep it. And to me as a child, it looked as if he could walk across it or I didn't see it. I just step straight into the sheet there. There's this old memories I'm going to those those days. Good morning, I grew up. I just stopped moving on. My granny died. Three months before I went to Australia and my grand Father died three months before I came back from Australia. And Interestingly enough, I was one of the last people to speak to my granny. She went into the shop. Battery knows that he's coming from New Zealand. I can see the butter boxes now. They were Brown butter boxes with the firm on the end and I think about it was called New Zealand Fern leaf. As she fell over about a box and smash your head. She went to Birmingham, acts in the hospital. Cause we cause of her age, she would have been in a 60 cent. She ended up pneumonia study pneumonia, and she died in Birmingham Accent Hospital now because of the fact by then I was working in Bellingham. I went that evening to see her and she died in the night. That was one of the last in the family to speak to me. Could use a great woman. Great woman. When my Gran father was a good man too. Because by then you see why I was in Birmingham. I haven't gone to Australia, but I join when. I was sent. To Smithfield, Birmingham, not Smithfield, London, which was in the Old Bull ring. To learn about meat wholesaling. And it was just luck that I went to Birmingham. My grandmother family will not far away 20 miles away. English feeling burnt on the villager Burnsworth. That's where I started doing business on in the Bullring of Birmingham. With a man who told me a great deal of fellow called Ted Evans. The tenant was the we would call them shop manager, but they were pitches and on in the market and 10 must have had a tremendous. Reputation for training young men because in my time with the Vesti organization I came up again several men who started with Ted Evans of Birmingham. So to weddle's he must have been known as the man who could train young men and knew nothing. Goodnight can always, so I can tell you about my first attempted sale. How was he had been told about pigs and I had these pigs on the front of the stocks, the shop and they can't even came up there anyway, I mean. In the morning there starting at 5:00 o'clock. So really, this gentleman is Brown County. I really tried selling these pics. Honey, listen to me and he smiled. Honey, listen to my banter, which is rather like a parrot 'cause I don't. If I knew what I was really talking about that time. And he said, well, as a good try said, whenever the market Superintendent. So that was my uncle remember that. But the big thing in Birmingham, of course it was frozen lambs. In the frozen land, the best the organization had was the River Stone. It was cool and they will return to the River. Stone floors and rivers to lakes and that referred to their weight range because I'm thinking back 40 years. I think there are still 2. Was £2832 in weight these frozen carcasses. And we will go into the market in the morning and the pictures that pitched the frozen lambs at night, and we'd never know how many levels we had to sell that day because what the system would be in the Blue Starship would come into Liverpool or Bristol. And then the road container or had brought them up to the market and they would pitch and they would page 200. Four 100 grams only frozen lands and we would have to sell them. Nichols later on in life, I actually killed Pack River still lands at River Stone in Australia, NSW. And then the other thing, which is a very very strong memory is balancing. I think there were four or five hours salesman. Under 10 items. And we will go back to the office. Which was just across the road from the market. Red brick. Typical Midland offices. Nothing in any way of comfort. Just hard chairs and tables and we would have to balance and balance meant that you took the number of land sold. The weight sold took all the prices out of the price books that we filled in and I remember Ted was a stickler, but we had a balanced to the penny. The revenue that weird taking all the credit that we passed. And if you didn't balance, you just have to keep at it. Nothing that into New Balance and you got. I forgotten now, but you got the knowledge that you could know if you were six months out, why that was. I can't tell you now because I can't remember. But when you're casting up with figures of pounds, shillings, and Pence If there is a mistake, you can know where the mistake is and you know what you're looking for, but we had to

look for it, and none of us can go home until we balanced. So if we started at 5:00 o'clock in the morning and the market finished at one, and if we were lucky with balanced and gone home by three, but I've done evenings while we were there at 6 seven o'clock at night, still trying to balance. Especially after the big days like pre Christmas or pre Easter or one of the holiday times. Anyway, after I'd been at Birmingham, and in those days. I stayed at the YMCA. There's no health and you still walk to the market every morning and the only way I could get a social life I do remember. Was that I used to go back to the YMCA asleep for a couple of hours in the late afternoon early evening. Otherwise he had to go to bed every evening at 8:00 o'clock and he had no social life. That time I had a green MG. British racing green. I thought it was a cats whiskers. Booty AMG and they used to drive around Bellingham with one gallon of petrol stumping around in the bottom of the tank. Because I couldn't afford anymore. I think that I can tell you that in those days I own for past two shillings a week. Well then after that and I knew this was gonna happen, I was brought from Birmingham. After six months time to Smithfield in London in the head office. And. This was the beginning of my formal training as a businessman. I went into. B Department. Beautiful gun. Smithfield 14 W Smithfield Big building, where Lord Vestey and Ronald Westie, Ronald vesting. The uncle was the man who ran a business with a rod of iron. It was a terminal fashion business. Very Victorian business. Um? It followed the philosophy of the West. Isn't believe me? I'm one of the Champs who admires the best it, except that I don't tell you. Later on, I did get caught. When they went bankrupt. I then I owned businesses and they would make money. But in those days going back now we were talking about. 1950 I came out of my team up group from the Army was 5301. I came out of the army in January 1953. This is the second lieutenant and. I I. So by now, which I must have been up at Birmingham. Six months, so we're now talking about September, October 53. Investees Was divided into 8 apartment and be Department and the Wool Department according to my memory. 8 apartment looked after South America and be Department. Looked after Australia and New Zealand. Most of the business in those days was wrongly called cable business. My memory is green pieces of paper with your cables from Australia, New Zealand and yellow pieces of paper which were cables coming in from South America and the whole business was conducted in these days before faxes and satellite telephones by cable. Well, after a period and be problem. I was sent to sit in an office. With two other men. Jeff Nielsen Who was PA? 2. Mr. Travel Mr travel run. The. Australia New Zealand Department. And I was PA 2 EJ bowl water. I think it has Daisy was number 2 and Peter bathroom. What's PA 2 Ronald St? No, Jeff Nielsen, I lost track of when he went to Tipton. He went to run W Davis Tipton. But my career laterally and my friendship with Peter Bartram, we kept crossing lines and meeting one another in the years ahead. But they were very. Very happy days days, which by modern standards they seem incredible. I'm talking about days when going in in the morning we wore a bowler hat, Mystic white color and carried a rolled umbrella. But they were interesting because her first job every morning was toward the market that Big Smithfield market and we became very adapt. But knowing where the prices were and where the market was going up or going down. And we reported back to our various departmental heads. When several fascinating jobs to do, I remember one job, Ronald Besties. Shares his pH. Peter and I had to list them all. And had me all handwritten. It was so confidentially the secretaries were allowed to do it. That's one task I remember. I also remember travel telling me Mr Travel, telling me. Pair shorts. Looks who's convinced they have forgotten. Because the cultural shock they're going from being a young city Jennifer had as big as a bucket. To be in the junior running back on a solar floor in Australia, it was quite a culture shock. It really was. Anyway, the time came for me to go. My father came with me. To King George the Fifth Dogs in the City of London. Oh, I'm sorry to city London Metropolitan London Westies in those days on for shipping lines. Blue Star, which was the biggest shipping line with about 36 ships. Lamport and Holt. Old station which run run around Australia New Zealand and the Booth line tool for shipping lines. Now it was normal for trainees. And indeed, company executives out in Australia, New Zealand to go backwards or forwards on the on the meat goats. And I went out to Australia, but it just happened that I didn't go out on a blue Starship. I went out on an important hold \*\*\*\* Which is. And just kinda blew fun instead of a red funnel with a blue star on it. And that, of course, was my first. Experience I had been to France before on holiday on 25 pounds. It was in those days when with a girlfriend. In many telephone line in France on 25 pounds. But anyway, I got on this meet both in London dogs, my father wave me off. And. It was such a peculiar feeling. Going down, I stayed on the deck as the ship went down the River Thames at night till it was dark. Congratulate the lights in

London until he disappeared. But it wasn't. It was exciting. It was sad. Unfortunately, having been in the army for two years. I was used to being away from home. It's interesting to tell you that I was off to the other side of the world and all I had in my pocket was £25. We don't. When we get to Australia. Which cell is chipping on the ship at the middle? It can over the corgi dog. Anyways, we had my first. My big memories are going through the Suez Canal. Boots. In those days this is just after the wall. Used to send the money down in baskets on ropes. They send out the goods and I was so keen to get an arrow shirt because in those days are nylon. Nylon Arrow shirt was the thing to have so I sent my money now. Locate my shirt. When I took it out of the box all I had was in front of color and two cups. Typical. Green as grass. And then it took 12 weeks. Two from London to getting off in Sydney, stopping at Aiden. Experience to create attorney stopping it. Adelaide stopping at Melbourne. And then I got off the ship in Sydney. Now I was taking to my hotel in Sydney the Metropole Hotel. And I was just literally left there and told reporters, producers meat supply. On Monday morning. I must have been totally addressed, but I can't remember the address it was in Pymont, Sydney. And I remember thinking, why the hell do I find it? And what I will do, I will invest in my very small amount of money. Take a taxi to produce meat supply, and that's what I did and on Monday morning 8:00 o'clock I turned up at producers me supply and started my training. Produces meat supply. And all of me coming in from. River Stone meet works on the Sales Depot at Hayes St Hey St Depot in Sydney, which is part of the big market in Sydney and it was just breaking bulk and packing up. For hotels and restaurants and retail. And some of the butchers there. They really were incredibly good butchers. Even though at that time was told how to break talk bit. In under 2 minutes now. I couldn't do that now when I'm cutting my fingers off. The weather doing it was quite unique 'cause it's the first time I've seen bowling done alot hanging. The piece of rope was put around the Shank of the hangover and put on the hook, so they taught me was not hanging on the Achilles tendon. He was hanging on a rope loop. You then freed off. The rump Cut along the seam. Cut a hole for two fingers. And bone down pulling the ramp down as you bound. And then Lastly cutting the Pope Sai and you were able to plant the table or throw onto the table are unk. And then. You took the. Think playing golf. Gonna heat up again seen boning. And finally, you took the actual silverside off and what was left hanging then was the. To hit the two leg bones of the topic. Anne, with skill, it was incredible that those men could break atop it into rump. Think Frank. Suicide. In under 2 minutes. And then after appeared there in produces meat supply. I was sent out to Riverstone. Now this is where my training really started. Because River Stone was out in the western suburbs beyond Sydney. And. Rooster into my memory was killing 480 cattle a day. And it was killing about 3 1/2 thousand sheep and lambs today. And it killed pigs roost and was an all around me works. No, from a technical point of view. Should we start on the floor? First of all, cattle once done with the captive Bolt in Australia in the 50s. There was a guy called Percy. Who stood destroyed and knocking Box with a 2 pound sledgehammer, not a full vans Daniela at 2 pounds sledgehammer. Honey hit those cattle every time in the middle of the forehead and my memory every time those cattle went down. He was an expert with a sledgehammer and then down in the stick hold when the game came out fell out of the race. They were bled and hoisted and taken up to the first floor level only addressing floor. And that's where I started. I started in let's take home. In apparel, bare feet apparel shorts. About an ice box. But you still, which was given to me until this day. I still use that still in the kitchen in this House. And then I progressed around the line, learning everything about butchering side of beef. Now again in Riverstone, the Castle was cited off. Hyde was removed that siding off, and they were split with a chainsaw on a line now hanging. No, I've never seen that in my life before, because back in England at that time. Cattle were killed on their backs on the floor with four iron bars, called pigeons and the iron bars had a point at one end and they stuck in two holes in the floor to stop the animal falling over. So now I was beginning to see big commercial killing and cattle dressing. Then from there I went into the sheep Department and my memories are not cheap Department. The sheet was craft. And otherwise they will live from there. We grabbed the chin, was pulled back and they throw quicker. And then they will put up on the rails by the two hind legs, and they started to move out of iterating. The sheep was quite straightforward, but there are two things. That I remember distinctly about that and. One was the operation of freeing the fleece at this stage, online Lam was hung up by his home legs. Its two front legs work folder. Does fleece was freed over the sternum and chest button and then the men had to punch the police? Are we talking about things in the 50s and I couldn't understand then and I can't understand now why men would do that. Because the constant action of punching the police

with their fingers folded. I remember 1 chat with one of the best was Amari working on that line. But because he worked on that one job for years and years and years, his hand was deformed. His knuckles were punch back. His fingers were permanently bent. And in terms of. Social thinking. It's incredible that men would work. Suffer. You're a result from earning a living. Anyway. That was a very interesting works because it was one of the. Looks at Vestis hat where she came in in one end of the building and meet the famous River stone tools, which I'd handle way back 12 months before in Birmingham were graded. The other outstanding thing there was the speed of the grader. Lambs were coming down the line and he would spin them, look them up and down, stamp them, and that grader was literally. Doing grading at the rate of two lambs a minute. And even look at them great and look at them and grade them. And then depending which line they went down in the chillers, their grade and subsequently into the freezers and when they would be stocking, ended up. And once they were frozen. Of course they no longer hung up. They were stacked up. But those are the two things that I remember. About that sheet line was punching the brisket. Love the fact that had all men's hands and the other was the speed of the grading. But I I digressed a little bit there on that. That was a unique sheep line in the. Rooster Meat works that she came in at one lambs came in at one end and at the other end apart from the meat going out, the Wolf came out. There was a film hungry and the wool was not just cleaned and washed. It was died. It was spun and who I think it was the only meat works that I've ever heard of in the world. Where is the other end? You could buy a ball of living will. It was a complete line, whole, unique because that was a Westie technique. Best he's built their empire. On the preceptor, if you wanted to wrap lamb and beef in stocking it as it was, then. Um? You didn't buy stock in it. You bought the Lancashire knitting Mills. And you will just talking it. If you had byproducts you didn't sell, the byproducts you made soap, hence they own rubber Windsor. So, and that was the way that that great empire was built up. Complete 100% utilization. Having completed my time in the meat works. The first job was giving was forming in the rendering Department. Having described here the size of them, it works. It was a big rendering Department. With horizontal Mount melters. Well, Mail dryers and then crashes. Losing my memory serves me on there is that it was the only Department. That apart from two or three regular form and type run on casual labor. I used to go there until the gate in the morning and I had the power of saying you work. You work, you work. Free young my lovers. Quinton No responsibility because I didn't look upon his responsibility. But he was quite. Position that you looked at men's eyes and you knew that you could give them a day's work, and those men wouldn't work. Well, I suppose that's the toughness of life after main phone and rendering Department. I was sent into Sydney into the head office. And I was the other end, now sending cables. Because I did a period in the marketing Department. Hello, period in the production Department. No. I think I started in the production Department, but no, he doesn't matter anything. A few months in each Department. And a larger bus. To read the cables coming out from England, what the forecast requirements were? And issue and to the various plans in Adelaide. Footscray Melbourne. Rockhampton, QLD, townsville. River stone The requirements forward and then the whole thing got into motion by departments knew what Castle to come and get. And when the ships would you? It was incredibly organization. And then it goes. There were other factors that got into it. If there was a drunk in Queensland and then a lot of cattle would come forward and then that would be on the other foot, the cables would be going back to London saying. On such and such a date next month. Brisbane Star Wars sale and she will have extra meat on board. GNU GNU lady. We got London. It had to be allocated, pitched and sold. And then in the marketing Department. We were involved in selling to people like Amco in the Middle East who were. Buying For olive oil companies in the Middle East, and then because I would have done had not been nationalized and it was still American owned, pretty shown. Remember fellow, there still County. Very fine catalog, which he put together. I'm still got a copy of that catalog where every cut of meat, every type of meat. Only manufactured me 'cause you were talking about. Make plans which had Kansan. As well as freshman frozen meat. And then my next move. Then they sent me down to Wollongong to be a sales manager. No. I didn't want to stay in sales, but somebody somewhere had said that this man is going to go into sales and marketing. Well, even at this early stage in my life, I've made up my mind. And this is not. Saying something. In hindsight, it was full site. I set myself an ambition. To be one of the best train men for my age in the meeting industry and I made it happen. I kicked. I pushed and I did two or three years on marketing and selling two or three years on production two or three years of marketing two or three years of production. And I insisted that I was not gonna stay in sales. I

wanted to go back into production because I could see myself being typecast. So my wish was granted and I was sent North to QLD. To rockhampton And. I stayed in Rockhampton. I think it was six or nine months and I was assistant. In Superintendent of the Canary, and this is where I learned about Canning beef. Weekend Those famous. Taper shape cans which we all know we called beef. Can we do sex is 6 ounces. Will they dances? I can't remember now. And six pounders. The big catering girls. And there are many stories about that which I can still remember. Nightmare of any country is foreign bodies. And I can remember the nut turned up in a Chronicle beef. In Birmingham and there was a hell of a ride. And the bowl of the fitting that not turned up in accounting on beef in Glasgow. I can remember that very clearly and we used to. Can corn beef every day and then the next day. We used to have to taste it and grade it. Now speaking from memory are top Brown. Went to America. And I think it was. Donald cook Our next brand was he referred. Next, great down our next great down. Who is Imperial? Which was the Westin Grand Imperial? And the bottom grade was ox and palm, which was sold up to the islands in various places like that. But a memory I have very clearly. Smell of cooking. Hundreds of tons of corn beef every day. And by the way, we the extract we refine down and down and down, and evaporated the water off in evaporating pans. And that was sold back to the United Kingdom's beef extract. Obviously it was subsequently refined into, I presume, Axelle and Bubble. But the point was that smelling this can be. All day everyday. Like wine tasters we tasted the Colby but yeah I couldn't eat it. We spell it out. And yet now, before and since I'm very very fond of corn beef and I still eat corn beef. But while you are actually in it cooking it, it was so much that you couldn't. You couldn't eat it. He went in laboratories in the morning and as I say like a wine taster he tasted it. Decided on your grade in flavor and then spit it out. Um? Well, flavor, flavor and fat content consistency texture. Physical appearance. No sort of things. And then I went North Townsville. This is the meat manager. And then my three years contract was out and I came back. I came back North about which was very interesting. I came back on the glance and stuff. Now that both came North about, it came up through right up inside the Barrier Reef. Stopping off at the northern towns Mackay. Remember look I came round. The pilot I remember the pilot. Sitting on the bridge for about 48 hours because we were inside the Barrier Reef rank abule, the pilot got off of Cape York. No, we came across. Indonesian up through Java. In Singapore to Bunker and back home, please do this canal. We told him about the meeting history, but I remember that it was so hot that the bosun rigged us hammocks and we slept on the boat deck at night. Because of the cool evening dealerships team, devoting notes, we had a faulty, not breeze. I can remember the flickers of light. Indonesians fished in open boats. And they had fires on the bow of the boat, because the flame attracted the fish. And it's only called the fish, which is a side issue. And now that actual shipment, I came back on on Gladstone. It is very interesting. Backup ribbon at Rockhampton. And I saw those cattle in the stockyards. I saw them killed. I saw the rail trucks come in. This was a job that was given me. I saw the rail trucks come into the meat works, an Australian rail track at that time was along truck and he gently had ice compartments. Another holes in the roof of the truck and you put the ice in the compartments of the either ends and that cool down the truck. This was refrigeration in the 50s. I saw those trucks filled with ice. I monitored and recorded the temperature in the trucks and monitored and recorded the temperature of the meat. I watched the meat graded. I thought supervisor loading that meet it went down to Port Alma which was the port for Rockhampton. And don't think of a big pool like London is just assigning's with a couple of cranes. The Australian wolfheze knew that it was important and they work hard. They were very good at the middle, minimizing the time between the main coming out of the rail trucks. Even I remember they even took the rails down on the side of the ship so that they didn't have to swing it extra height. In other words, they could swing it lower into the holes batten down. And sailed now the whole object of the exercise in the prepared we're talking about. The best quality of importing mean on Smithfield Meat Market London was the chiller quality from the Argentine. Now this mean when we say chiller quality, it was chilled. It was not frozen. And it was a magnificent job of technical know how. The holes of the ships with ghastly carbon dioxide to hold down. Go back to your logical growth. Because the holes were chilled and the time then from the River Plate back to London was 21 days. Now I was involved in an responsible for seeing right through this particular shipment from Rockhampton, and it was to be the first shipment of chiller quality back to London. So as I was saying. So it loaded up all my. I sailed on that ship. I will come up the job because I have to be in the training by I'm serious. I'm still in training. Coming home on that ship. And with the Chief engineer, we monitor the temperatures in

the gas concentrations everyday. And we don't back in King Edward Doc in the City of London. And I saw that meet unloaded. Impeached under Smithfield and song. Only we're trying to beat the 21 days from the River place in London. I will only start once on the way home, and that was the bunker for field in Singapore. I think we only bunkered for about four or five hours. My memory tells me that we got it back in about 26 days, which was an absolute record of bringing wink back from Australia. Side issue story. Which shows the attitude and the British work one at that time. Rule is trouble and all this consideration of this me. When it came out of the whole of the ships, he came out on what we call rings. And there were six or eight hindquarters hanging on wise, which will look through the Achilles tendon on one ring, and a crane lifted it over the whole song on the dark side. Anyway, somebody blew the lid lunchtime. The train stopped. Through this trouble I I can remember now the frustration or thinking that 8 nine quarters is gonna just swing there in ambient temperature for lunch and now. But that was the attitude of the London office. It's no wonder they lost the business. They all went to containerization. Glad you got was rough. Remember the chief engineer himself? Risking trouble with the Wolf is 'cause we could do this and you can do that with closing the hatches down again. Anyway, I saw that meet pitched on to Smithfield. So I was back in England. It so happened Australia wanted me to go back out there. When I didn't want to go. Online business channels and furniture in my flat was still out there. No, but I don't. I don't think here, I think. I was being naughty 'cause it always been my plan. I really wanted to see the world. I didn't want to stay away from England the rest of my life because I'm so much in Englishman and Joy England. Britain. So I was given the job. To go down to back to the dock area, London. Benton Rd, East Ham Well, it was an avatar. Under the auspices of British Beef Company. I went down to. Benton Road, oh. Gosh, it was a terrible area. Low gas works in dogs. And I remember being absolutely amazed that I was expected to kill beef. Undress. When I was a manager I didn't kill it but we killed even dressed it and I was back to French islands again. It was on the floor with rejoins. And there were no chillers. There were no chillers. So when the weather was warm heart. Got it was a constant learning. The condition is basically tried. Everything that we could do. We space the beef. I remember we put fans on the beach with that tried to be found. And I do remember being routed Jewelers. I mean do list this time the best in retail company? There are over 1000 shops in Britain. That was due list Fletchers East wins London Meat Company and I think I'm in Scotland. It was called Monroes. But the power of dealers. I made negotiating with British Beef Company in head office backing 14 W Smithfield. That big building where I started. And there was some formula which was based on the Reuters sheet every day. In those days there was a sheep published by Reuters, a pink sheet and it listed the side price for Scotch size. Decide price for English sides. The price for various lambs in various way. Areas in the price for various pigs in vehicle weight. And the former was based on the Smithfield writer. Price and I don't know it might mean a penny less, but dealers took all the meat from West Ham. Benton Rd Also, I was charged with building up a retail butchers. Service So I had to go out from running the Avatar. And. Call lumber shops cold calling and start asking could we supply them with beef sides full quarters my quarters. Pinks levels? You know I can't remember now whether we kill pizza. But we must have done. Voice only in kilograms. I'm. And. It was very hard work. It was very worrying work. I remember being very stressed at that time trying to run this avatar with no chillers. Trying to Both of these men are only Silverman. Trying to convey to them my knowledge and how we can improve things. And trying to. Sell me to butcher shops around London. Anyway, we got on with it and it and. I must have done it right because. The man who ran British beef in those days was a gentleman called Bob Ward. And Bob would have been an auction ear. It's been an auctioneer. I'm not talking about the 60s. 7060 sixty 6162. He'd be an auction here in Shrewsbury and he was now the general manager of the British Beef Company. And he said. Next to 14 W Smithfield, there was a tall, narrow building in those days called TW towns. Building TW downs was. Generic shows Reno. You was general manager. British beef company. I suppose. Because of my knowledge and. I was brought in to head office. Not as assistant general manager, but assistant to the general manager. A good and that meant that I was. Involved in selling from British beef. West Ham, where I just come from British me, Swindon, British please. Whitney British beef Gloucester. And. Bridge base, Linden. And it was very, very good training. We sat in the same office in desks facing one another. Only with selling all day long and marketing and organizing the kills and telling the avatars what to kill. The best is next week and indicating to the avatars what the retail price was. Monitoring the over 2 hours costing. I'm looking at a costing sheet and I can see him in my memory now as I speak to you, he started with the price paid for the

Castle because they get in the Castleton over 12. Cost of Labor, the overheads of the Avatar, the shrinkage, the yield and the selling price. To see whether that particular model of Kathleen Peaks on machine and made a profit or loss. And those machines which I subsequently used a lot in my career or the basis of it unit costing and unit profit. No, we now come to a period where. I started and set up the Irish pig Department. Still investors, I'm still in TW downs building and I just got myself and it cost Clark. At this time, the Northern Irish Pigs Marketing Board. So well organized, it was as good as the Danes were. And the Northern Irish Pigs Marketing board. Had the unknown Irish pigs organized in such a way that they could tell you. 12 months in advance in June will have so many pigs to sell. Julie will have so many pigs to sail right through the. And it went down as low as 200 pigs a week and he will end up as high as three half 4000 Pixel Week. These are pigs that were surplus. Till the requirement of the Northern Irish Pigs Marketing Board and their bacon requirements. Now, with a man called Rolling Hills. I started this Irish pigs Department wanted in essence what we did. We tended to the Northern Irish pigs Department. A man called Jerry McGinnis and we were successful and we obtain the contract to market those pigs for the next 12 months. The administration involved in it was both exciting and frightening. We had to go to normal and we had to arrange the killing and Nelson, a ballerina McElderry and muffin whiteabbey inniskillin. We had to arrange for these things to be killed on these weeks. We had to agree the price. We had to make sure that all the offers the pluck switches the lights, lungs, rather lungs, hearts and livers were marketed. We had to arrange with Link line. That they would actually build and make containers for these pigs. We had to arrange with the ferry company which we settled on bringing him from Belfast integration in Lancashire. To bring these pigs over every week, we had to organize the transport from Heysham down to where the pigs were sold. And I started that Department as I say with myself and across club. It ended up at the end of the first year with myself and about four salesman and accosting Department. And it went on for three years. And it was very exciting, but very fulfilling. Bill business. The pigs were what in a word called cuter pigs because they were baking weights. Speaking from memory of Porky Pig was from about 80 pounds up to 110 pounds deadweight. The counter pain was from 110 pounds to 140 pounds. So you know we're talking the side weight and above that was heavy hug. And literally there were times when it was easy. There were four 5 containers in a week to sell, but there were other times when. That would. Ten 1520 containers of data cell. And I've done a lot. It is to have trucks on the way down from. Asian in Lancashire. Driving towards London and the pigs weren't sold yet, but we sold them to the wholesalers on Smithfield Winters. And shops like that on Smithfield, and they were all cut up and sold. No, the relevance of this period is that all my life to date with Vestas. I had been a training, but now for the first time I had my own Department, my own men and more importantly the end of the year I had my own profit line and I knew what profit had made for the organization. So after this second year. When I went up for my annual review across. Dewey J, Bolger in other words just. Across car plane back into 14 W. Winfield and I can remember it now. I was given about attention in the week pay rise. He decided to take off me my car allowance. The rest is at a very unusual car allowance. You owned your car and they paid you money. All agreed with Inland Revenue. And that actually covered your depreciation, your insurance. I know you can claim with your petrol. And I thought this was so unjust. And I decided that I didn't learn a lot from the rest is but it was time to move on. And so I saw an advertisement. In wanna trade papers? For marketing man Mark Harris based accounting Wilshire. Now when the time came I was leaving. Very interesting this. There were too many medals. Only and his deputy fellow Paul wins Gold, and those are the two men who really tried to stop me leaving clean investors. But I was determined no, you had your chance. About you thinks I'm lying with tensions away. Price but Misty was famous in those days. If there was a saying in the train in train, them will pay them. So if I go down, Harris is account and I was interviewed by a man called Gilbert Roth, who is the general sales manager of very very nice gentleman. And those were the days when Harris is a con were the best in the pork and bacon business. And I remember the killer off said to me, well, I haven't interviewed you. You've interviewed me, but that was just his way of being funny. But while I was there, Gilber off, told me along to meet Malcolm Sanderford who was the Managing Director and boss of Marsh Harris. He controlled the whole. Whole group. And I was given the job of marketing manager pork and pork products for the Harris Group. Now, that meant that I was selling pork. From 17 factories. The last group in those days was incredible. There was Harris Tautness, Harris E Lee Harris, Ipswich Harris Khan. Royal wills, Chippenham. Colon Louise Cyrus sister Dunmore Fitch Painting Company Vale of Mowbray banking

Company. The one in Scotland. I can't remember the name now. How goods are getting him? It was an incredible organization. And I had to put on the road. Salesman and I had to get lorries to deliver the pork. And I have the sellable. What we were actually selling was the. Poke, which was not required for bacon. And offered support not required. Bacon, for example Forends hands in Belize. And it was a very. Big business and a very interesting business, and it brought me to a situation where I was sat down with something for one day and he was saying what can you sell more and I said, well, we can sell more in this country, but the French markets opening up. Sounds good. What is typical gruffness Cassandra Bird came to Marsh Harris from the link should go up so it will go on and get on with it. God so sunny France. So much to my surprise I found myself. Going to Paris to layout the Smithfield, France and starting to sell pork in France. And again, I was very very successful. Because I said companies like a leader. Floor emission. Sweet Paris. And we were soon in a situation where we were shipping out 10 and 15 containers of poker week to France. And in this period of my life, it was very. Exciting because I got into a situation where every Wednesday I went to Paris and came back Saturday morning and this went on for weeks and it was a very nice thing for a young man to be let loose in Paris. It was a very interesting period because it. Introduce me to the Continental Park business, introduced me to a lot. Impotent buys on the continent, but it was amazing. At that time to go was president, and for some reason the government. One week, literally broadly barriers down in the tariffs window, and I had contained as a pork on the road coming up to Dover, but it was it just finished as quick as that. But whilst it lasted for six or seven months, it was a very interesting period in my career and it meant that I learned my way around the French market as well as I knew my way around the English market. The next change in my career Sanderford knew that I'd been production trained and marketing trained, and I was actually on vacation. That is so cool and definitely I got a message to come back to Carl and went back to call in the middle of my holiday and I was thought this must be important to call me back. And Sanford, maybe manage are of #2 factory account can was divided into 1 factory in two factories. One factory was the manufacturing factory where all the sausages and pies were made Marks and Spencers. We're upping his customer. And #2 factory was where all the killing and curing went on and bowling. For a practical reason, the boating room was across the bridge. Cross the road and internal bridge. Into #1 factory premises, but it was managed by #2 factory. So here I was 32 years of age and I was manager of the biggest bank in curing plant in Europe. We were calling to my memory about 1400 pigs today. The sellers account, but like a cathedral. Because historically the reason that count was at COM was in the 1700s, when pigs were brought over from Ireland by ship to Bristol and then walk to London. By the time we walked up there, Scotland, over Marshfield, any things that weren't gonna make it to London. With their feet dipped in tower, by the way to say that whose they were called out income. And so this Jack Harris set up a factory. Then from that group Harris is a girl. The ice came out of the canal. And the ice was put in troughs. A new sellers to keep the Brian Cool and that's how the great Harris Ofcom Crown brand will secure came to the industry in the world in general. So by the time I got there, some of the old sellers were still there. But they were also modeling sellers. The difference being the outsiders were like leaning over looking into a swimming pool in the modern ones, and you could take a forklift, truck and pallets of sides and then put the wood in and the barriers and feeling full of rain. The brain, by the way, was the original brine. It was monitored every day by the laboratory and insulting nitrate content was adjusted accordingly. But one of the ways you would test the rain was with a candle and take a handful of it lifted and pour it and look at it like wine and the judge. The color and everything through the. Through the candle lights through the brine. Khan was at that time right up in the front of technology. For example, the pigs weren't standing with electric tongues on their heads. They will gas stunned. Pigs will woke up around and got onto a moving conveyor belt and that conveyor belt then dig down through a gas tank and when they came out the other side, they were dead. Now I think that was the most Humane way of killing pigs. All my life I've been involved in cold cases. Studies on you. Oh animal welfare and later on this comes very much to the full and a big court case in London, but everything icon was first class. Khan was a fascinating factory. Um? It was steeped in history. It there were several things in there which were unique in Anna. It's only generating plant and not generating. Plant was so big that it could supply electricity to the town of garden and it was sold into the National Grid. That was the unique responsibility. The. The pigs will cut up after they were graded. Whether we're going to bacon and then of course all the Craftsman. This is apparent in my life when I realized what Craftsman were. To see those old men and it used to worry us. Lee's

older man, not old man, older man. He used to worry us where will we get such tradesman from? When this generation goes. The technique of. Chopping down pigs. The ones on down they would jump down. The technique of wiring at the rib bones. The technique of. Stacking and rubbing salt. All these things that their craftsmanship is not a trade is the craft will debate is a craft. The tragedy is of course that factory is no longer there. The group was bought by the FMC in the fast of Marketing Corporation. And. The Danes got stronger and stronger, and competition, and the fact that the supermarkets in the housewife today buys on price. Don't miss is gone easily is gone. Harris itself has gone from Conan. The factories pull down then and it was a huge factory. Coin In coin landmark. But it was a period where. Craftsmanship was important. It was a period where. Knowledge of France. And knowledge of the whole big market was important. And I. I left confer politics. The job I wanted was obviously to be the assistant general manager. All general manager. So Jones Golden sun Goodfellow. The Golden Sandal men and I got on so well with Gordon Sanford and I really think I got on well with him because I wasn't frightened of him. Advice on selling well, I would say so, whereas he was a man who was so powerful, there was a tendency leaf right? And a lot of men and he had another quite a few. Yes men around him, but I always got online with me anyway, Stratton got rid of Sanford and. I then there was a man whose name I know, but I'm not gonna mention who came in as a consultant. They brought in AIC consultancy at that time. And I thought it was completely wrong. But while they were in as consultants, the senior consultant change horses and became the assistant general manager under the new journal Nature. Fellow called kernel ports would come to the pig mine from the Pink Bar Department. I just thought, well, this is wrong and I thought, well, I can see a block here. So I decided to move on. Through MSL There was the opportunity my MSL's Management selection limited. Who will begin the Sunday papers in those days? I don't know when they still know 'cause. I don't look at that, but I'm looking for jobs for years. Um and I was appointed the general manager of a new division of Radicals. Brussels was a sausage in Pike Co base to ambition. And they wanted a new. Division set up in the North. So I up sticks and move my family. To leave Oklahoma kid roles in Lancashire and I drove over Pendle Hill everyday to Rawtenstall in Lancashire and what we did at Rolling Stone. We took an old Lancashire knitting mill. Can get it because. It had a long. Whole, which was perfect for the job and we converted it into a sausage and pie factory. And we started up with the van sales free in Lancashire. Only grew that fleet. We grow it up to about 14,000 pounds. Remember that Brussels had a very old chocolate Brown 1920s man. I was full bright ideas in those days or outlook. Create an impact in image and without police permission. I borrowed vans from the South. And got this old Brown van which came up North on the trailer and set up for the big convoy of about 25 point Brussels vans led by this old Brown ran around all the towns, Burnley in Bolton and Clitheroe because I cause traffic chaos with his convoy but by God I got the work the name Brazzle well. Well marked up there and Brussels. It was hard work. It was exciting work. It was. The time when I started to realize that I got a great deal of. Job satisfaction out of building things. Creating things, talking to engineers. Talking to architects. And generally building up factories from scratch. It was my first experience of building a factory. It was not my first experience with doing a new job. And I really enjoyed it. To the extent that after 12 months I was called down to mission. And the board appointed me general manager of the central parent division. Now that was a big Division I think I'm correct in saying from memory I had 118 sales lands on the road with sales manager and sales supervisors. Supplying the whole of the Metropolitan London area. I. Do you know anything I stolen stop there because I just thought of Paris is Western style. Sausages could have told you a funny story about that, but we've gone past that now. And. Can I tell you? I'll go back to Harris is when God said food was a Harris is they launched and you sausage and you sausage. Completely new to the British pallet and it had a Smokey flavor. It was a marketing disaster. I'll tell you that before I get to the end of the story. Sandoval had everybody regardless of their job out of their office is out on the road selling this sausage and because it was called. Because it was smoky flavor, but it was called a Western style sausage, so all the sales organizations and sales were called into briefings Ann. In each briefing and they were about three teams around the country. One of them was dressed up as a cowboy. Now I because that's something I haven't met. Talk is over. All this time was very active in Keene territorial soldier. And I managed from the Armory of the Wiltshire Regiment to borrow 238 in service revolvers and blank ammunition. We were sent with the focal Terry Axe Hood. And a man called John Reed and myself down to brief the sales force in the West Country. And we will talk this. And you could just see the look on the salesman's faces and Van driver salesman's faces. Oh God,

not another head office briefing. And we had them up facing us all normal on the stage and flip charts. And this was all part of the presentation. The impact. The but we were just going through some routine sales and suddenly of course until then the back doors of the whole open in Kane. Terry Axford, who was dressed as a cowboy, firing these 38 revolvers, only gave one of the chaps I heart attack. The impact was incredible because they were all they literally all. Either back, you know, these revolvers going off in this all and subsequently to that and all of us had to go on the road selling and I was selling. I remember in Maidenhead selling these Western style sausages but the British public weren't ready for a smoky tasting sausage, so that's another story. But the West Harris Western style sausages. They did have an impact and if you meet and talk to Harris Man today who's in? Around that time, he remembers the launch of the Western style sausage anyway, coming back to. All the sales force that I had with Brussels and I had the biggest traveler of them you ever seen in your life bro. Brussels made their business on two pies, the pen pie and the pinup. I, the pen pie was a small pot pie, and the pinup. I was the slicing pie. And they sold those pies to pubs. That's how Brussels got started. Brussels at that time had gone into steak and kidney pies, and but they were sausage and Peppers, please. 2 main products. And they did it very very well and they were very very successful at it. And Brussels had a very good man sales business in London and they also had a plant at Whitney in oxygen and they also had a plant at Winchester. And they had the plant which I just opened up in the North at. Rolling Stone Well, by now I'm sitting here running the central division, the biggest division. And then. I was really enjoying it. One day I was called in by the money directed. And he just said I want you to take over the job. Then they'd be in board reshuffle. And really come on. Had become the Managing director. But previously being the production director. And he just called me and said I want you to. Take my job that I had. I'm being the production director of the group. That is the only time in my life that I thought against the promotion. I said that wrong. I'm not. I haven't finished yet. I haven't. I'm in the middle of developing the Salesforce for London. I'm in the middle of reorganizing the factory. I don't want that were they insisted that I took the job. And alright, I eventually gave in until good job. And became the head of production for the whole group and one of the saddest things I had to do when I sat down. And I crunched the numbers was closed down the factory in the North. The I just opened and I never had the guts to go back to that factory. I closed it down from Amazon. I did see all the people. Many years and that something and I run Brazil Groupon. And I was traveling between Amish and Whitney and Winchester. Well then we come to a very sad part of my life. In that I was called in one evening. Well, if you put it in context just two weeks previously, I've been told to look out the window and I can tell you now. Hello. She was. For example. Couple weeks previously. Every young man judges is success. Whether or not he is. Got the trappings of life and I've been told to look out the window and there was this beautiful Big Blue Austin Westminster. Get lost in Westminster. Was a car like a Rolls Royce. It was an incredible girl. Reminder she said to Roy called, who's that for you? He said, no, it's for you. Because the board. Please. I couldn't believe my luck. So you can imagine money. Why shouldn't I don't know? Now to four weeks later, I was called into the office. And that. Conversation started with we have decided to reorganize the company. And there's not a place in it for you. Blue is absolutely poleaxed. In my career, this is never happened. Oh, don't worry, we will look after you will give you six months salary. And you can keep your car. Until you got a job. No, I took it. Not a man on the chin and I went home and I recall it. It was alright till I got home. Went up to the bedroom my little cold. Who's in a cot and I looked at around. What is post time crying and the reason was that as a young man's first detached house. And I married and I'm looking after some stepchildren and educating them, and I suddenly realized my commitments. Anyway, I Rang my friend in Brussels. Uncle John Bull, who come to Brussels to head up the marketing Department. Very, very successful marketeer who inactivated, launched Vester. In the previous employment and you said John, I've been made redundant. And he said, well, I don't know what you're worried about, so I sauce Terry Red Model Factory Manager. He shows the cost. Accountant accountant cost accountant name then. The sequel to this story is that. We'd all be appointed through MSL. We all had follow up records annually and they'd all been satisfactory. In selling my house, there was a series of meetings with MSL. One of the directores by myself who subsequently to Brussels or they would never work for them again and they did improve our severance package. It so happens I was only out in the cold for two weeks because Peter Reynolds, the Managing director of walls, Rang me. You said David witness happen in Brussels. Come and see me and I went to see him and I told him this storyline just hold. Peter Reynolds said, Oh well. We can

use you and he helped many payments right away and I will send to Madison's assistant. Managing director of Madison's back to east London again. Driving every day from hell in Buckinghamshire, down to slow along the floor up to. Hyde Park corner down them all round Trafalgar Square down the strand up Monkeys Hill and I threw my Lynn Rd and down to Stratford. And I did that. For some considerable time anyway, when one door closes, another door opens and I'd never before worked with. A company like Medicines, Verna matters. Was. Really hard task master. I need to run a really tight ship now. It would be inferred ingemi to mention what is religion was. Do you can guess? I'm gonna came out of Germany with his father. I can't as I told you, remember the name of his father when I met him. The escape from the nurses. And they came to London and literally started. Turner, tell me this story started manufacturing salami and sausage. In the kitchen, in the flat, in the apartment and eastern London. And smoking it. In the coal bunker out on the landing outside the flat. But from that Madisons grew and grew and grew. And it was a very very successful business. It was extremely productive in manufactured Salamis and that worsen blood bursts and all the continental sausages also introduced me to a technique. I'm curing have language. I'd never come up against before arterial pumping. The method of curing ham. Is 2 plunger needle into it with Brian under pressure? In several Adlib no specific areas and squeeze the trigger and out rushes brine which kills the poke into Hamill bacon. There is a modification of this call Alanko stitch bunker, but the lamb must be boneless. And all that is a series of about 84 floating needles and it goes up and down. The machine goes up and down each time they have moved forward 1/4 of an inch or centimeter. The needles come down, prepares the meat and inject the brain in arterial pumping. It take the leg and with a very, very special knife which has a curved plane blade. Indeed, I still got that knife. You turning down the main female boner lamb? You you you pass the chisel and I will describe it as a curved chisel up and down the femur bone until you free the bottom and then pull down from hand. So you now got a semi boneless ham. You then find the main femoral artery and you put a single needle into that archery. The butcher concern clamps is forefinger and thumb over the artery and pulls the trigger and releases the brine into the arterial system. The Brian follows the artery down to the small arteries into the capillaries and disperses the brine more naturally all over the ham. And that's arterial pumping. So the situation with medicines were such that it really was. Period of intense learning, an intense gaining knowledge on continental curing. The fact I'd never come up previously against what is turned on the continent as a sausage master. Sausage Master is a man who works chopping bowls. Chopping bowl various sizes. all German seidelman Anthony. And the bowl revolves, and at the back of the bowl there are revolving cutting blades. And to get a constant sausage. Do you the actual number of revolutions, the number of revolutions that you put the spice in? How many revolutions you allow that whether you chop it with ice or with snow to keep the temperature down? All these are critical in obtaining a constant texture, constant flavor, and these men from the continent called sausage Masters and all Flash Masters. And very much is had too, and he had a brilliant German. Who I can't remember his name isn't the old rules sausage master. There was another man there. Another German called Adolf Winter. And in my capacity as Assistant managing director. I don't want to technically work to me. I don't went on in life to become very very successful. And ended up with a shaved ham business in Milton Keynes, but that's another story. My time at Madison's was. Very important to me and very much matter of. Learning the continental side of the business, so by now I'd mastered the English basic butchery business had mastered the will trick your business and now I'd learn the Continental sausage business. But nice moves on. There's no doubt about it, but. Ben and I are chemistry didn't work. The opportunity. Arose when I was headhunted. And I was headhunted. By a company in Scotland called Wilson's of Scotland. No Wilsons was established in. 1849 And the man who was Robert Wilson, was a man who was years and years ahead of his time. Examples of this are there. In 1938 he had the Birds Eye franchise from America. He knew it was bigger than he was, and he knew it was potentially more than he could grow, so he sold the franchise to Unilever. But some of the things that that man developed were light years ahead of his time. For example, before the 1939 war, he was supplying Belfast hospitals. I should add here that although he was caught by origin, the family had settled in burn house in Northern Ireland. But he was supplying the Belfast hospitals with frozen precooked meals before the war. Now that industry did not really develop until well after the 3945 war. He developed firefighting firefighting foam from animal blood. He was the first person to get deeply into can pet food. There was a company called Kanamit Academy, which subsequently he sold his colors. But this is indicative of the forward thinking of this

man, Wilson. He took a derelict Castle from the Earls of Eglington. Cool Eglington Castle Which was on the West coast of Air Show at Kilwinning? An apart from taking the stable block. And technically he closed over the courtyard, and that was the beginning was Canary. But even in terms of his butchery, it was the first air tent in Scotland I think is one of the first date ends in Britain, which is consists of a large airtight canvas, rather like reminiscent of a giant parish balloon in the wall. The positive air pumped in continually so that it stays inflated. This has the effect of the positive air pressure. So now I'm sorry, contamination no outside insect. Could get into the burning room. And he was Canning at that time. Mainly chunky steak and mince for the major supermarkets. Of the country. A man called Pringle or Pringle was the sales director. And a man call Grampy's was the multiple sales director. And when you think back? Oh, when I think back I had a series of shelves or acted in my office and there was hardly a name that mattered that wasn't an unlabeled product. Marks and spencers. Sainsbury's Waitrose safeways. Spa evil Every name you could think of we can for. Cameron smell? Daily Camera smell was the Managing Director now another phase in my learning curve came from David Cameron smell. David Cameron smell had been the head of the whole grocery division of The CW S. And I once went down to a CWS Canary. In East Anglia at Davids bidding. And there was still a management chart on the wall with David Cameron. Smells head at the top. His name of the tongue. And the actual empire David Cameron smell controls. The CWS was incredible. It went from Winsford Bayton factory in Cheshire to vegetable Canning in Norfolk. Tobacco companies in Liverpool. But anyway, when the man who was revitalizing the CWS. Whose name escapes me now, was killed in an air crash in South Africa, CWS. The Collaborative Wholesale Society started to revert back to regional cooperative societies and lost its national identity. It never lost it completely in today's he WS trucks are all bloom white, and there is a semblance of national bland brand, but that didn't alter the fact that the power of the CWS was in the regional committees and the regional committee members were. Political appointees are not alone left wing politicians, but they did not have the knowledge or the marketing savvy to drive the CWS to the maximum of its potential. Considering his customer base. So men like David Cameron smell left it. And David Cameron smell came to Wilson's of Scotland, I think, via cars of Carlisle. His wife team was from Casa Cola, but anyway from David I learned. How to professionally run? A large company and that was every facet of it from learning how to manage meetings, how to lead meetings, enum memos. He would send them back with the English corrected with a double negative or. Something of that nature and what David Cameron smell told me is always stood me in good stead for the latest senior development. Then I got involved in one of the clever things which he did was every director in the company, regardless of what his function was, and I was appointed Director of Production and Purchasing. Whenever your function was, you still have to have a commercial responsibility, and I was given the commercial responsibility because of my army background because he knew I was interested in the services and interested in military history. He gave me the Ministry of Defence, the MoD account. And I started with the Emodi account when an annual turnover of 400,000 pounds Sterling for Adam and when I'd finished with that account, the turnover was just under 3 million and there was a Wilson can in every box of Compo in a British forces. Most of the work was done in development with the Admiral T, featuring laboratories down a postman. So I got to know most of the chemists and food technologies down in Portsmouth and I seem to spend an awful lot of time traveling from Scotland to the MIT in London or from Scotland to the laboratories of Portsmouth. But it was a fascinating period of time. We develop many products for the MLD, but the one which I think was most outstanding and the one which seems to give us the finest accolades because it was so popular with the troops. I think it was indeed compo. And it was an Apple pudding. There was an engineer at Wilsons called Bill on it. And Bill on it was not an engineer. With degrees and qualifications bill and it was practical. Engineer who understood Canning seeming retorting and all problems that you get in a Camry and in working alongside Bill. I told him what I wanted to do. Bill worked out. The weight of pastry required to spread up the star. The base in the sides of account and the pressure required on a plunger to take a pre weighted piece of pastry and the pressure being such that it was equal to forcing their pastry had an even thickness across the base of the cannon at the sides of the can we then fill the can with stewed Apple. Which was very sweet because soldiers like sugar and then just put a lid on and see McCann and that steamed Apple pudding became one of the most successful products in the Ministry of Defence. As I say, we've had all sorts of products 'cause we had cans in every combo pack students take. Mincing onions, steak and onions. Steak and carrots. Apple

pudding. Everything you could think of which will good wholesome food. Wilsons Canary became very very successful. And. It was at this time that we were getting involved. Will be easy and we were getting the beginnings of. Pressure from Brussels pressure on jumelage beef. And lots of new techniques. No, rather not techniques. Lots of new regulations were coming out as they can fast from Brussels. And it was a period here when I got into a very big trouble in so far as journalism. And it was the lesson I learned about journalism we were launching. A new product for the supermarkets. And we had a big launch which involved. Bring lots of journalists at the plant. And I was talking off the record about weaponry problems to a particular gentleman. And it goes. I didn't understand journalism and when it was off the record or not he got put into full print and I had the whole veterinary Department at Edinburgh down on my head like a ton of bricks, but that taught me not be very careful what you say to journalists. One of the things that Robert Wilson did, these sort of things where he was miles ahead of his time. The gardens are Eglington. He's developed rollback. And they were an absolute picture. It was an outstanding part is the only time in my life that I've ever. Works in the center of a beautiful park. The park was so beautiful. Bridal couples used to come up and have their photograph taken in the gardens. Comma. Wilson was a man who was light years ahead of his time in my office. I had two RA paintings. The whole of the office block was covered in oil paintings, beautiful paintings and today my love of painting. I'm sure stems from that period and sit in an office and stare at NRA painting all day long. Yes, the productivity was good. Yes, we work hard. But it was a wonderful atmosphere to work in Robert Wilson Rd. Two textbooks about money management and I still got those textbooks and I've used them many times since. He was a man. From whom I learned so much about leadership. Never tell a man to do something which you can't do yourself. Always look after your people and something which cropped up later on. In lucky if you can send people to work in a beautiful environment as they come through the gates, that thinking will change. They will realize that everything around them is clean and pretty and beautiful. And they will take that attitude into their work. And I use that so strongly. Later on in my career at McKee, both Scunthorpe where we won the gardening competition for several consecutive years, until Scunthorpe Borough Council asked us not to go in any further, and to McKee in Milton Keynes. Well, everybody commented about the gardens, but the fundamental things that Robert Wilson knew. About leadership about man management. About having pink tinted lights in the ladies cloakroom slings, which today are either take for granted. But he was doing it years and years ago and he taught me leadership of people and Cameron smell taught me leadership of large companies and I learned all that from Robert Wilson's. Send news. Send Mother happy very happy period of life. Very satisfying, satisfying period of life in business terms. Right up until the time when Kevin Wilson died. Right up until the time when he died. And then the company changed his son Jimmy Wilson took over. And then. David Cameron spell was retiring. It was competition to be the next Managing Director. In the. It's very hard to tell about this part because it does involve. Knowledge. People away from Robert Wilson's. If you think I should say it, I will say it, I mean. It boils down to this that. Jimmy Wilson Would not get off the fence. There were two of us in the running to be the next Managing Director. An excellent fellow called Jeff McNeil Douglas McNeil Douglas. One meal. And myself. And instead of having the courage of his convictions. And saying to me, David, I want Douglas. He went to the rigmarole of calling in consultants who spent a considerable amount of time. I think it was two weeks or a month with me in 2 weeks or a month with Douglas who would then advise the board. As to who should be the next Managing Director? Now, what Jimmy did not know. Was of course with my Contacts in the city in livery companies and things of that nature I knew the consultants boss. And I was invited to a dinner and told Outlook David don't build your hopes up 'cause he's not gonna get this job is cut and dried. And I was so cross. Jimmy didn't have the guts. Face me is I mean it was his company inherited from his father. He cannot move the hell he like to run it. But he didn't have the guts to say David, I'm gonna take Douglas. I'm not thinking you. And to go through this fast, this which cost a lot of money. I'm bringing consultants from London. So see if I peas with a fork or knife. And what my knowledge was, and what does this is not? It wasn't. I'm not decrying Douglas Douglas was a bloody good accountant. Um? I'm trying to Sabina Wilson's a lot longer than I had. That's not the point. The point is that this eat dinner. That I decided that the. I would start looking for green fields. I was very sad about it. I was there for life. I was there for a pension and shares in the company. But I was determined. I wanna do that to me and I was. That time. Head hunting for lucky. Now it's just coincidence. And. I am taking a partnership in Lucky and I left Robert Wilson's. But I was very

sorry to leave Robert Wilson's. I was very, very happy there. The West Coast of Scotland sailing, which is my other hobby, had my boat and invoke it. It was a wonderful company with great potential. I mean, I haven't mentioned what I have mentioned. Academy Academy. And I was in a position then before Brussels started to intervene. Then I would go out in the autumn. Anna Barrhead. We rented two complete holes. Of the cold store. I would fill that when Hank orders of beef. To take the flash in those days before Brussels in the field there was a flash of cattle in the autumn and prices would drop in the autumn and that was the time to buy. And I mean now, speaking from memory I can't remember, but I had hundreds of tons of frozen hindquarters, beef, bone in in that cold store of Barrhead, and we had. At Barrhead we from all the boning we did. We had bone crushers and we used to sell the crushed bone to Kanamit Academy the whole. Business. Was professional. It was the highest standards of Canning. It was stuffed with outstanding people. Jackie Patterson, head of quality control. I can't remember the charming ladies name now who ran the laboratories? The cost Department. The accountancy Department And above all, he was led by David Cameron's Mail and it was an outstanding company. Why it no longer exists and why it went down is not my knowledge because I'd long gone. But when I was there, it was the top Canning company. Probably not as big as Hines, but certainly in accounting company that. Close second only to Heights. Indeed, it it led the South Pole counters, and that's another story of how. I got involved in the British meat manufacturers. At least we can probably come to later on. But he's gone now, but it was a wonderful company. And I would. 2000 Last time we stopped we were. Talking about how you were headhunted by country? Well, it was coincidence. Time in life. Is amazing, everything happened, but I knew that Wilsons. I was not. Going to get the top job and part of my thinking was always that I wanted to get. Indeed. I have a series of targets throughout my life. I think I've said before that I made my life work so many years on marketing so many years on production. I had a target to be directed. By the time I was 30. Which I achieved. I missed my tight family in director. Black couple of years and my ambition never went so far as to be chairman and only my own companies. But nevertheless I achieve that but. The time would come at Wilsons when I I wanted to talk to you. I wanted to be the Managing Director and I knew I wouldn't get it. I was hurt at the time. Because I didn't think that Jimmy Wilson needed to gone through the charade of having Douglas and I monitored and watch over a period of legal two weeks. I can't remember now. When the listing was already taken. Nevertheless. I was looking and I heard about. But don't lose coming to England and there was a serious now of coincidences. And historically, some of them might not be in the context of time, correct? I went to London with Douglas McNeil. And we were. In the West End of London. Actually in the Haymarket and I said look, please McDonald's, I'd not seen a McDonald's in England before, but of course I knew McDonald's be cause loss that Robert Wilson's I done some research and work on flexibel Canning. Flexible Canning was developed in the United States of America by Natick, the American Military Laboratories, and the idea was that soldiers jumping in and out of foxholes kept damaging their ribs by the fact that they carried small cans in their ammunition pouches or in their breast pockets. Flexible Canning is account, but it's a flexible package. It looks like a silver paper pouch. No, the main research on that was done by a doctor, Dean Duxbury, whose headquarters in laboratories were Oakbrook, Chicago. So the 1st place I ever went to in the United States of America was Oakbrook Chicago in the laboratories of Doctor Dean Duxbury, and that was. Amazing, because the most formative and the last 2025 years of my career were based essentially around my Association with McDonald's and Willowbrook, Chicago. Having seen this McDonald's by coincidence then. I found out that they were looking. For a partner in Britain, in the manufacturing side of the business and I contacted. Someone in London and the next thing I knew I was called for an interview to McDonald's in London, but Donald's in actual fact had started in England in about 1975 and the first door had been at Woolwich. Bob Ray was the entrepreneur who came to England. He made a franchise E in the United States of America and Cleveland, and I believe Philadelphia, and he'd sold back to Corp his franchises and then took out. Franchise for England. Alittle factor wishes aside here, like all Americans, he came over thinking he's got the United Kingdom because he'd got England and he couldn't expand into Scotland or Wales. Douglas A dynamic hard. Entrepreneur. He was one of those men who is the boss. You looked at his eyes some mornings and you still get the hell outta here and don't ask for anything another mornings you knew that. He understood all pros. He understood risk. He admired leadership and bubble. He admired knowledge and subsequently even convert into one of my greatest friends. And he's a man who I. He admired tremendously in today. The interview took place above the Westminster Bank, in

Parens Lane in Hampstead. Because of that stage, MacDonald's or just rented a suite of offices, and I remember that they were about full men sharing one desk. The early pioneers were red, Oakley, the vice president, purchasing Phillip Compton, the vice president. Oh Property and. Vice President construction David Richards. And those men with Paul Preston, who had worked with Bob in the United States of America, where the founding people of MacDonald, UK. When I joined, there were seven stores. When I retired, there were over 1000 in the United Kingdom. I remember. At the interview, I remember what it was stressed that they wanted someone with knowledge of the British meat industry and knowledge of production and modern methods and it and also someone who will himself would be an entrepreneur. To me this man's back was absolutely. Perfect I could have written a better one if I'd written it myself. Anyway, I was asked to go over to the United States of America. Another series of interviews, this in itself is a chapter. I took a Friday off. From Scotland I flew to London. I got a plane to Philadelphia. I went through a series of interviews which were non stop. I flew back and I walked into the office in Scotland into the boardroom because on a Monday morning we always met for coffee in the board room to discuss the business and everybody said we had a nice weekend. We've been sailing. I said we had a nice weekend, but I didn't go sailing. None of them knew that I've been to the United States of America and back in the weekend. The point about going to Philadelphia is that a major supplier in the United States of America to McDonald's was Keystone Foods, and another man who I came to admire tremendously and with whom I became great friends but little subsequently. There was not a disagreement, but in my story later on, the way Mickey went was not to herbs. Wishes. Elaborate on that later if I remember, but I went to the United States of America. I arrived and because of the time difference is. I went straight to the Keystones senior plant and Phone Croft Philadelphia and there was a gentleman called Ed Silverberg who was the vice President production. 'cause we started in the production all with a sack. Oak standing by these last blenders. I'd never seen such big blending and forming machinery. There were 2000 pounds mixer blenders. And it was a nine line for maximizing the biggest for Max. Factory in the United States of America, or indeed the world for Max, was a complete again from Chicago, which, along with McDonald's undeveloped performing machine which took the meat into a hopper. Pressing through pumps and started at 90 strokes a minute as six burgers, a stroke in the hole in the McDonald's story, it is a matter. Ray Kroc, in the Founding Fathers friend Turner or McDonald's. Decided the what they wanted was the best. The Rolls Royce and it doesn't matter whether it was bread and baking meat and patties or machinery or cookers. They set themselves to become friendly. And have a relationship which was above the level of commercialism with various people who lay their chemistry worked and they developed then evelop machinery. They developed braking they developed Carling, they developed baking. They develop French fries they produced and cloned a particular potato that is the whole lessons of the quality of McDonald's. So that's why this grateful makes factory in Philadelphia. Philadelphia was one of the first factories in the world to go to McDonald's and say we can cryogenic Lee Freeze a burger? Freezing it to minus 200 degrees. In 1 1/2 minutes in trapping all the flavor and alright qualities of the meat. It's over, it's good me by these large hoppers with Isak Hook and of course the meat was being tipped him and with the sack rookie pulled join to meet what's that? Chuck wants that rib. What's that? The brisket? What's that machine that he wouldn't have said the shin because there was no shin that was the one cut that was never included in McDonald's but that was the principle. Then I stood there until he was convinced that I knew everything about me and there was to know. I didn't understand him with the financial director and I was given. I was in. Because of the time difference, to me it was about 2:00 o'clock in the morning and I've been traveling all day. And then working in the factory. I was then by the giving. A session with the financial directory given the center accounts and then to look at these accounts and give my opinion, but what they represented in the strengths and weaknesses of the balance sheet. We then had dinner, so about 4:00 o'clock in the morning I went to bed. Let result when the next day after meeting her blocking the Chairman of Keystone Foods. They offered me the position and look at partnership, so I went back into Scotland on that Monday morning and I had two jobs. I was under contract to Wilsons. And I had in my pocket the offer of a contract in partnership with. McKee, which was McDonald's in Keystone Foods. My contract with Wilson's was very unusual in I could only in theory retire or resign the first 2 weeks of any September in any calendar year, and likewise they can only dismiss me. Negligence in those same two weeks in any calendar year. By now Clement Wilson, the man who. Find March Madness Lena letter. Also. Understanding of the future the industry years

ahead of his time and died and Jimmy was my German Jimmy Wilson and I went to Jimmy and I said Jimmy I want to leave. I don't want to be in soon as possible. Any refused, he wouldn't let me go. I was being worried about this. Because I made up my mind that I was going to join the partnership of Mickey. So I let Jimmy Reed the joint venture. Document and Jimmy was a man who. Was influenced by American. He'd been to Harvard on a part time business calls. Indeed, Wilson sent me to Harvard on a weekend 7 hour course. Because he was influenced by America is actual words to me when he read the joint venture agreement. Document was if I stopped you going for this, you've never forgive me. So he let me go. And I left wilsons. The best of circumstances. With the Silver salvers directores dinners and I took out the joint venture with Mikey. The action which was going to change my life in the style of my life, understanding of my life over the years to come. The joint venture was 20% LD Walker, 40% Keystone Foods and 40% McDonald's. Now at that stage in my career to buy 20% Woodland cost me 20,000 pounds Sterling. And I have no alternative but to go to the bank. And pledge everything I had. Tomorrow the 20,000 pounds to buy the first transfer shares and even today I can remember how. Worried I was. The fact that my wife, my children, could end up standing in the road with me with everything gone because everything was committed to the bank. My house at that time. Would it be worth? Hello. 50,000 pounds like you know. I really haven't thought about that. But I mean it was a terrific risk too. Leon But I I had faith in McDonald's because I had seen McDonald's in the United States of America. Um? I need a variable is very under very peculiar, fascinated by taking this job. I knew that the temporary plan was to be in an abattoir of Wellingborough. The reason for taking the plant was not that we wanted to use the Avatar, but the avatar was empty and redundant. And of course it had freezing and he had a bowling room with the length to put the freezing tunnels in for cryogenic freezing. It had the type of buildings and the type of rooms which were required for a meat processing plant. I knew by conversations at this stage because I was involved in them. Building a brand new account at Milton Kings up to the top. Easy standards. I knew that there would be a. Superb situation of the park eventually, but for 1218 months I had to work in. My life I knew whatever trials were like, I knew what an old avatar would be like, and most peculiarly because it was a temporary situation. I never went and looked at Wellingborough before I took the job, so the morning I turned up to start work was the first time I saw the place where I was going to work. But I did that very consciously because I didn't want to leave. The beautiful offices of Wilsons, with original works of art in the office and go and work in an avatar again. Anyway of restart until we go to Wellingborough and there were two Buffalo grinders there. There was a basic team of Dorothy looking for five girls and a couple of men. And it was so primitive. But there was the essential for Max machine and the first cryogenic tunnel. There was tremendous support from Keystone, tremendous support from the menu key stand. If I had any technical problems, there was someone out on a plane from Philadelphia to help the engineering staff or the technical or quality style. So although it was primitivism, though, it was very simple. There was a tremendous backup. And we were at that time had help by having a resident production man over from Philadelphia to help us get going. A wonderful, wonderful man who subsequently died cool dead thing who. Who is the typical American? Who came from the wrong side of the tracks? And work his way up through Lake Keystone Company. Until he was in actual fact president of production of all the keys to home plans, that time there were plans in Albany, NY, full growth Philadelphia. Nashville, TN. Chicken plant in Reedsville, North Carolina. Little blonde In Oak Island, names going? Welcome back tonight. So there was one full backup and it was wonderful to be with such a knowledgeable family's Keystone foods. One of the interesting things is all my life in marketing. I had seen it is my job to make profit and a little Side Story which caused a lot of trouble in the very early days. Between here in McDonald's I thought that it was my responsibility and maximize the profit so accordingly. When would you dishes buying on a meat market? And I had a new piece of meat supplies on you throughout the country. I managed to make too much profit and there was a board meeting with McDonald's Bob Ray in the chair. One of the first times I realized that cross Bob could become. When I got blown out of the water. Because something I had to. Get used to and subsequently I saw it 'cause this greatest strength McKee was open book costing as the business grew, and as a systems grew and as they were weekly profit and loss accounts and then monthly profit and loss accounts. Um? They copy those always went to McDonald's. So McDonald's new every cost in the business, but McDonald system was to give cost plus with a profit. And it was a wonderful system of two point 2% of the tax. Now McDonald's use this system worldwide. I know, but I'm gonna solve it was the more McDonald's grew, the more profit

you made, the more profit you made, the more you invested back into the business. And it was a recipe to make every MacDonald's partner work to their maximum ability. I mean, in McKee over 22 years, I think for the first 15 years I never took a dividend. We never issued a dividend because every pound of profit went back into the business back into improving the business, improving machinery, improving the technology, improving buildings. And this was the way that McDonald's works. And it was the way I learn to work. Mostly love. Working at Wellingborough. McDonald's expanded and we. Managed to install the second line. Very smoothly. We were simultaneously building this magnificent plants at Milton Keynes. Which was a copy of the Keystone plant because they had worked out. The idea of a production floor with chillers and refrigeration to the side. Dispatch dispatch banks holding freezers or work one side in roller, compared on a FIFO system first in first out doors on the other side of the freezer coming onto the loading bank. And. Here in Britain at that time to see the standards of the finishes, the quality of the equipment. Depth of thinking that have gone into the architectural construction. The kolling's to stop damage to the walls. The system of compacting rubbish directly production floor. Everything was most impressive. So when we were working at morning bro. I'm building the plants. A little games. There was another personal site issue in Milton Keynes. I looked at the size of the office which was for the benefit of the Managing Director and I want to say the least, with rather overawed with it in email, his own private club from the Managing Directors, cloakroom and shower, and it goes to an English woman. This was rather strange, but very natural to American. But I thought that I would not in any way, and I made a conscious decision that I never said anything about the furniture. All the Deco just let them get onto it and let these Americans do it their way. Because at this stage the plant was being constructed under the. Guidance of a fellow call Joe Mazzuca, who was an engineer from the group in the United States of America are very, very wise decision because subsequently there was a lot of criticism about the luxury and the furnishings of this managing Director's office. But I couldn't quite handle hearts. They had nothing to do with it. I just walked through the door inside of the death but did not for the fact that when I sat at this desk. In this magnificent office with cities in both cases, but it was very impressed and very proud. Anyway, that's beside the point. All the time this was going on. I was developing people recruiting. Young men and young women. To become quality controllers and production stuff, dog star loading managers. Freezer controllers. For the next 10 or 15 years, it was one continual. Pleasure of creating a business. Making it more sophisticated, making the systems more sophisticated, for example when. We started. Quality control. The meat which was delivered to Mickey. It was already passed fit for human consumption, whether veterinary certificate as is standard in this country, but we went on refining and refining. The techniques of quality control. Until we got to the stage. But by the time the meat went out of the plant, formed into a frozen Patty with the correct number, plus or minus three patties per box, the meat had gone through 42 quality control checks everything from serology, bacteriology. Temperature controls and we will refining all the time and improving the quality of McKee was based on the quality of the staff and the quality of the people who work there. We're saying I was always a man for cliches. The 100 percenters are outside the fence to work inside the fence. You have to be 110%. Likewise, we had many ideas, and one of them was operated on parade and operated on Parade in North early like another parties till 4:00 o'clock in the morning. But by God you be there wearing to go at 7:00, or you're in trouble. My days at this time were incredible. They were from 6:00 o'clock in the morning till 9:00 o'clock at night. It cost me a marriage. What is another story? We went on building up lucky. We realized I, I realized. The the things are coming Wilson that told me applied in money management to McGhee, but he had outstanding gardens around the factory because I worked on the principle that if. People came through the gate and the staff came into a very nice environment. They would perform and have the right attitude. The cloakrooms I'd learned all these things from Clever Wilson. The ladies go home at a tinge of pink in it and send your pink in the lighting in the mirrors, because he did their morale good. Bob Rae Fortunately agreed with me. That we should be outstanding in the what we gave our workforce and we had the best workforce because we could dim and the best workforce. Such things as everybody had five pounds of product free every fortnight. Everybody was in private medicine, not just the managers on the top floor, but everybody on the factory floor them their husband or wife and their children were in private medicine, paid for by the company which meant. That alright issued so personnel and welfare. So far in front of what was common in the United Kingdom at that time, that the unions never got anywhere near it. Because the people didn't want to use the unions who

unwanted conversation I had with the Union official. I told him we were so far down the motorway that he couldn't even catch us and he accepted it and we never ever again heard from unions. I'm. Everybody was on Christian name terms, including me and managing director. My door was always open symbolically and that meant that anybody on the factory floor could come and talk to me if they had a grievance, they could go through there. Luke part and parcel of building up the spirit of Mickey. Everybody's name was on their overall there Christian name. And everybody again. Something unusual in British food industry. They didn't get a clean overall once a week. They can go to the in-house laundry anytime of the day, any day of the week and get themselves one of their clean overalls because everybody had their own overalls and it was all part of the image of Mickey. Mickey. Lead the way Ann McKee set the standards for the British industry. As the years went by, those are not my thoughts. Those were acknowledged thoughts by the industry. I very well remember reading a paper and the International Meat Symposium in Dublin about combo packing. Combos were large. One trip Cardboard containers which held 1800 pounds of meat. They were so far in advance of the 60 pound boxes of boneless meat, which was used in Britain at the time, being 'cause the nominated boning room could put one at the end of their line. The after their quality control, the meat went straight into the combo. The combo was on a pallet. It was dispatched probably 1416 combos to a truck, into McKee. It was faultless handled. It was then hydraulically lifted into the blenders. Now to have such an open, complicated high standard system you'll realize by now that my quality control Wasn't just at the factory, it went back into the suppliers. It went back in terms of trace ability even further to the farms. But no plant could be listed as a McKean supplier unless it had been passed by my quality control staff and they had enough systems and enough controls to ensure that the main coming off the line was up to Mackey Standard. We insisted that. The specification of Boning was a McKee specification. The specification of bacteriology and bacteria counts was a McKee specification. The metal detection was a McKee specification. It was so sophisticated it didn't happen in 5 minutes. He took five years to build up this network because at the peak. When buy weed, open Scunthorpe factory McKee was the biggest meet user in Europe. We will producing 1.4 million burgers a day. We were using the whole fourth quarter and the hindquarter flank. Nothing was robbed but to obtain the full quarters that we required each week required 8400 head of cattle. In the context of the meat industry, you can understand that this was big and it took some controlling. We eventually took supplies. From Como to the North of Scotland, indeed. We at one time had, I think, from memory 74 listed approved abattoirs and bowling rooms. We would not take meat from a second boning room. It had to be a primary boning room attached to an avatar killing plant. We wouldn't let me be killed, moves sold brokered, then boned because we knew by experience that the bacteriology would be wrong. The meat had to be killed. Chilled down to temperature within 48 hours boned and it must never be more four days old. When it got to McKee. The lorries I've known lorries be rejected on temperature alone when they appeared, including Doctor McKee. The loading docks are looking more constructive in such a way that they when the truck backed on, they were air sealed the McKee. My system of rubber buffers and seals and of course the whole loading document keys was air conditioned. It was one of the points which is surprising, but people will work in a temperature of 10 degrees. And that was the legal requirement over easy approved plant. By now. As the years went by. Bob Rae always worried about the lead disaster. McDonald was growing McDonald's by now was probably over 500 stores. And there was always that theory that if the jumbo. Crash landed on the Milton Keynes McDonald. Whole system would crash, so it was decided that we would build a second plant. McDonald's in their expansion by now. It built the second distribution. Diplo, I've got Rochdale in Lancashire so I went North looking for a site. And what I was looking for was communication, motorway communication between the head Office of Milton Keynes motorway communications, the sudden distribution Depot, Eminem said and the new distribution Depot at Rochdale. Because the system was that we sold the meat to McDonald's acts the loading dock. We didn't have to deliver it to their depos. It was McDonald's me when it left our loading dock. So I found the site of Scunthorpe Aprime site. Running on the entrance discovered, thought it was outside the redevelopment area. It was not. Suitable for ground. Because of this it was only about a quarter of a mile outside, but that wasn't what was important. What was important was the size of the site and the position of the site, and McDonald's understood this. So after. Great deal love. Research we decided to buy this site and it had enough room to build subsequently another cold store. A freestanding coastal. Which for some reason never was built. But again, the plant was built. Improvements were made over the McKean

building. It was the same one standard layout for the internal goal score was nearly twice as big. And it was a matter of. The fact that the plan is coming through the planning committee and the local MP. Said basically, after a visit to Milton Keynes, but if we would build a plan. In break to the standards of Milton Keynes, the plan is when he was every assistance. And they were true to their word. So we commenced the building of the plant. It's comes up. And that plan is the first one was a state of the art. The second one was absolutely outstanding. It was opened in 1999 by a Royal Highness the Princess Royal. A lot of day that was every member of staff. New games was bust up disgruntled monkeys or laid out and a great day was had by all and before the Princess and left the building. I took her on at all and she saw production. Being going down the lines. Passing comment she made in the laboratories was it taste like steak, to which I replied, well, mom, it is doing it is meant steak. John grew and grew and grew. The. Development of McDonald's sales were such that every month there was a cutting session in Frankfurt and Patties to that. Cutting and testing session. When from every plant in Europe. I need Mickey. Milton Keynes didn't come out top and Scunthorpe, second, or Scunthorpe felt to milking 2nd. I can tell you there was a right rail way down in my office. But I'm pleased to say that when about 3 exceptions in five years, McKee did come and talk. This led to great rivalry. Between the German clones of Gunsberg near Munich and Murky. Not rivalry sometimes got a bit harsh, but it was only rivalry. Unlucky over thought, it was better. McKee by now. I had written a man of many quality control for McDonald's. And because of the success of Mickey. I was made. Chairman of the European Quality Control Committee. And I virtually worked. In setting up. And improving standards in every McDonald supplier plant in Europe, from Finland to Malta and from island to Turkey. So I think I'm the only chat and I know there's work, then everything works. The McDonald's had in Europe simultaneously because of our quality. We began to supply McDonald's internationally. The situation started with Denmark. Denmark, where our first export country and remain very close to my heart throughout the whole of my career. In McKee. But that was then a change in the chain management of McDonald's. And I had a man on my stuff at that time in field operations. Field operations water field operations field operations. I had a team of men quality controllers who worked not in the plant but out in the McDonald's stores. They went to all McDonald stores that we supplied the at the country was divided up into areas and they visited the store and checked on the product check. The product was being handled right, assisted in the handling of meat taught. Handling of meat. Grilling meat in the stores. Run courses back at base for Management and McDonald's had their own Hamburger University by now and there was one day where they spend time with my key both in our lecture halls and turn on the factory floor. Because of the change in management and it happened over Christmas period. There was a likelihood that we would lose our first customer. Denmark. But when in the McDonald system the franchisee has the right. To buy product from any nominate McDonald's supplier, but that very seldom happens because the local McDonald's National Office tells them where the meat supply should come from in the bun supply in the French franc, the French fry supply. But because there was a chance Barry and I between Christmas and the New year, and God, it was cold and was there snow and ice in Denmark. We went to Denmark and we saw every franchise E. And we visited every store in Denmark and said look, your management is changing but we would be very proud to go on supplying you and the net result was that they stayed with us and we are lucky supplied Denmark right up until the BSE crisis when Britain couldn't export. Our actual export sales. Will eventually. Denmark, Holland, Belgium and half of Hong Kong. So I mean we were a major influence in. Supplying the development for McDonald's in Europe. A couple of things happened. I spoken about how I was building up a team of experts. Which were outstanding. 1. Was the McDonald's bacon? Is re Ferd two as Canadian bacon is not a bacon Russian like we know in England it's around circular piece of bacon which is sliced. I need then fits into a round hamburger type bun. The system in the United States of America. Which I went over to study was. Based on the fact that the United States of America does not have the selection of pig breeds that we have in Europe and it has different uses. In the United States of America, they never use back bacon. They use drinking bacon. They never fried, so they always grilling crisp yandi. If you have breakfast in the United States of America, you don't stick your fork into the bacon, you pick it up with your fingers and eat it. The actual eye of the loin. They use for lack shingle. And ham. So the type of back Russia that we get in England is not known in America. They haven't got the selection of pigs, so it was basically a solo in that they were obtaining. To brine, inject tumble mold. Fill into a casing slice and they then froze it. No, with my bank knowledge I'm going back to my days are harasses

account. I knew that this was wrong and I knew that you wouldn't get the right texture or the right taste. So we took. Bacon, pork trimmings. We worked in conjunction with the company in Denmark. We tumbled them. We molded them. We slice them after curing and we put them in a handgun tray, shrink wrapped and chilled them now. Consequently that bacon was moist, flavorful and tasted fresh. Ray Kroc himself on a visit to England. Tasted are vacant. I was so impressed with it. Then I had to smuggle and I do mean smuggle packs of breaking into the bar is Oakbrook. For them to test and try. And there's the one one of the things that Mikey did. It changed the whole bacon handling method over Donald's in the United States of America. Because they copied our chilled gas flush, shrinkwrapped fresh bacon and stop freezing solo. Another feature which we actually change, the McDonald system was based on a man who became one of my partners within the company is the developed Adrian Darling. Adrian was basically the son that I never had. He came to me recommended by another ex vesting man. There was a burning room at home often. Cold harm art in Market Harborough. And the Chapel was the Managing Director. There said that they were closing the plant down. And did I want a very good meat man who it was in actual fact his training officer. But it started with him as a boner. That man was Adrian darling. In the. Construction and development of McKee. I was always looking. How good young man? To join the company because one of my principles of management is always been, never be frightened of strong men under you. You come across in industry people who always want to be the top dog and keep everybody down. Clement Wilson again. Don't do that. Get strong people and they will push you up, and that's exactly what happened with Adrian Darling. I took Adrian on as a meat quality controller because of our meeting's pension, which I've alluded to. Age and subsequently became production manager. Then factory manager, then production director. He at one time was the director of McKee, but subsequently through illness resigned his directorship, but eventually, of course he remembered was managing director of King Meets and managing Director Key Country Foods which I haven't talked about yet. I went to Pitts Burg to the Hoffman plant to see how they made the pork sausage for the breakfast program for McDonald's he consisted essentially of. Blending Coke. We seasoning in the mix of lenders, which I refer to. Forming it through for Max again into a ram sausage. Not the sausage in the skin, which traditionally we understand in England or in the United Kingdom. So that he could be sliced or not speak about, not slice. It was formed so that he could go into a button. After it had been formed. It went down. The cryogenic lines annoys is probably hear that this was a major waste of energy. It then still on a continuous belt. Went through cookers. And it was. Then frozen and packed and sent out to the McDonald's restaurants. No. I came back. Be cause. I came back. I am eating every morning at 10:00 o'clock in my office with all my game managers. And. I described the process. And what I see. And what we would have to be doing full McDonald's? Because McDonald's we're about to go into the breakfast program. My real shot came about three days later. When Adrian walked into my office, he said taste these? And believe me, it was a superb McDonald's sausage because I'd come back with all the recipes and allspice levels. What Adrian had done. He filled the sausage meat into a casing. He got what we call a water bath cooker heat, cook the sausage. I need then hand sliced it. And it was that moment which I thought this man. Who's got what it takes and this man is a thinking man and Adrian's career with me. From that moment took off and basically it never looked back as it time developing years went by. We became toddlers and we thought the same way we he listened to everything I said. He took every point I made to him. I developed him socially as well as. Industrially, and we became, and still after this day for Mr Friends. But that was the development of the sausage. And. We actually went one stage further. I'm Azor finished talking to you about the sausage. We realized that when the sausage was put on the MacDonald's grill in the store. Again, the McDonald's. Everything is written down, everything is timed. Is incredibly detail, which they will go into. For their crew members, we realized that this amount of cooking time fully cooked the sausage. And I was able to convince McDonald sat why should we pre cook it? And then you reheat it. If we form and slice the sausage. Freezer sausage And you then put it on the growth of the breakfast program. It will be cooked, so we cut out a full production stage on the sausage production in the United Kingdom. So. Would that that was a development that we wrote about as well? Can I have a break for right now just for a minute? All this development. I was going on like Donald's. So expanding and expanding, and McKee only reflected the success of McDonald's menu. We honestly believe we've been told that we contributed to that success. It probably now is the time to explain how it kept became the eventual homeroom wiki. What basically I started as a 20% shareholder?

Using Keystone Foods and Folders and book Donald's. Something happened politically. McKee Major technical partner Keystone Foods Keystone. For reasons which are known only to have love money. Succumb to the expansion of Northern Foods, United Kingdom in Yorkshire. And Fred Turner. Who another man who I am very friendly with still and it would be with Ray Kroc, his first manager. Another time I'm talking about was. Chairman of the Board of McDonald's in the USA. Fred open visible Wall Street Journal one morning and found that his biggest American supplier, Keystone Foods, was owned offshore by Northern Films UK and there was the mother and father Rows. There was a ghastly board meeting in London among couples. In which her who at this stage in their career looking was my mentor, my leader. He was Chairman of Monkey. As I was managing director. Had to stand outside the ballroom door like a little school boy outside the head Masters study. And Barbara and I and another director called Jeff Wade. Argued out listen Ario that. Printer away over the Atlantic Ocean in Chicago was so furious. He still had to go out of the partnership in England. Bob Rae was ballistic. He wasn't going to have Northern Foods coming into McKee. He himself was upset that her blocking that done it. And the net result of the mornings rallying. Grumbling was not her blochman was forced under the joint venture agreement to sell his shares. To the remaining partners with Donaldson myself. Now you can understand my goal Teeter block one at this time. I. Argued and argued and argued that Herb should stay chairman because I needed access to his technical and practical back up in the United States of America. And I won the argument. No problem, have no shares. He still foods, had no shares, but have remained chairman, comma Key and I thought that I had rewarded. With loyalty is important to McKee so my shareholding. Went from 20% because of the mathematics are breaking up his 40%. And the new relationship between myself and McDonald's. I went from 20%. I think 28% as a shareholder. So it was now a partnership between McDonald's and myself and not a joint venture. Three ways. The there was another change in shareholding. Which took me up to 49%. And MacDonald's 51%. And there it stayed. For about 10 years. And this was all in the years when. Please mention Nike by now looking at 400 employees. LA turnover McKee was measured in millions of pounds Sterling per Adam. The best year profit and Mickey was about 1.6 million. Still, there was no dividend. Still the prophets were being plowed back, repaying bank loans, buying more machinery. Nothing was taken out of the company. This was the way McDonald's wanted it, and this is the way I run it. But one day Bob Rae Rang me up and said, David, I want to have lunch with you. And I thought where the devil should I take this big American cosplay mean Bob was a big American. He was being physically. He was being mentally and he was powerful. Where should I take him for lunch? Very English lunch and I settled on Browns Hotel in Albemarle St and I took both brands for lunch. Hello I thought I wonder what he wants to have lunch with me for. Anyway, we sat down. Please send David. We're going to start franchising at this stage. McDonald's was macaco every store was owned by McDonald's UK. Go McDonald's. Golden Arch is. Under the American truck eggs. An American company can't take two profits. In other words, McDonald's couldn't take a profit out of the product. And the profit out of the. Franchisees. I thought know what's coming. My first thought was he was going to sell his shareholding to another boner. And I want you to borrow it. And here is the strength of the man Bob Ray. Here is the wisdom of the entrepreneur. Understanding of Bob Ray and he said McDonald's will guarantee the debt. Then I went to the bank and I borrowed 3 1/2 million pounds. And it was over. Six years alone. I like paid that loan back in five years. And I was down the 100% owner of McKee. You can imagine what I thought now I felt, but what it did do it allowed me to expand the group and this is where Adrian comes back in. Hey dude with the meat man through his backbone and we'd often talked about expansion and vertical integration of the company. Indeed with McDonald's blessing, there was a stage where we've gone through owning cattle. We had cattle on a feed lot of in Yorkshire. By absolute coincidence, nothing at all to do with her Brotman story. It was there was a farm. Yeah how which was owned by the Chairman of Northern Foods.

## **Colin Jay**

By the value of a pig. In those those years when we get picked at home, I understood about the economics of the food, the conversion of the food ticket to him to get the best return, and that's that's a husbandry side. So I

think that's that's the area where I learn most from my involvement at home with pigs. Well, husbandry obviously is the is the feed the feed which you you give to the pigs is very important because from that P converts either fat or lean. So it's very important to be able to identify what the pig is eating and what what amounts it's eating. You have little control over the genetics of the pig because you were buying a thing called a Weiner. Weiner. Weiner really could come from any farm you wouldn't know too much about it. There wasn't a recording system in those days, and so the history of the pig wasn't there. And so it may have had a tendency to be fat anyway. So it was very hit and miss really so you had you learn to look at your pigs. You learn to judge because I did learn to judge picks. That's one of the benefits of being a young farmer and I used to go on on livestock. Judging in particular pigs. And I learned what the characteristics are, that of a pig at bacon weight. Which is 200 pounds live weight in those days? That is to be long. Well when you judge pigs live. Then you need to know what the characteristics are of the pig when it's processed. In other words, what are the what? What's the process pig gonna be valued at? And obviously length is important thing. I think I mentioned that too early, but length of the pig is very important. Because the length of the pig is measured from the. From the shoulder to the leg. That is the. So it's really the back of the pig. If you could imagine the back of the pig behind the year, that is a lesson you can clearly see visually. Whether a pig is short and stocky as we can with human beings. In this case, instead of looking at human beings or whether they are tall or short, we're looking at pigs, whether long or short, whether they have a deep shoulder. If they have a deep shoulder, then it means that. The value may be less because I sent you early. The shoulder itself is worth less than the back. Only in the game and then we have to see that there's a. Does a well fleshed leg. That means that the garment itself is likely to be round and full of meat. So they are the sort of things one looks for in a live pig. What sort of feed did the pigs get? Well, in those days of course process food wasn't used very much and I can remember that we had a copper to boil potatoes. So potatoes were was a. Was part of the food I can remember the acorns used to be gathered. In my very early days, not in the latter days 'cause it was then mormile drive. We had a thing called Amelie Jet. Where all the meal which is better, the pigs later on in my? My younger days. But before then, then it was potatoes, a copper and things like acorns. Um supplemented with. Some Mail. But then of course as big production got more sophisticated than they were rations available. You bought them from people like BOCM. Which were the main suppliers or pools of Ipswich? There was a very large animal food supply called RW Pool. Who I got to know very well and the poor family very well in my later career? But we would be buying Mail from them. Pink big pallets. And these would be fed to the pigs. May be made from from grain, from grain or maize. Maze was very important. Was an important ingredient in pig food. Tapioca which was imported from the Dutch West Indies, that became a very important that was one of the products. Which was used to buy that by the Dutch to improve their industry. They have the access to Deepwater ports in the Dutch West Indies, which we didn't have as a as a country. So later on my year I my my career I found how important it was to the Dutch industry. But those sort of things were fed to pigs. Soya so here is another one which is imported from the states that was fed to pigs. And of course there was. There was waste. Of course. I mean there was the. There was a thing called swell in those days. Swell was food which was collected from restaurants and eating catering establishments and boiled up in coppers and fed to pigs. So yes, that would have been part of their diet in those days. It's a prohibitive food today because of the possible spread of disease. How would it speed? Delivered. I will be delivered in sacks in those days 'cause we were only very small pig. It was only up. Just a almost a hobby. Rarely please food pigs we had. They weren't. They weren't a mainstay of our Air bar business. The mainstay of course was the nursery. 200, well, that's at times, but they won't. They want the mainstay. Alright, then the most important part of the business was that was the nursery itself, but we could have up to 200 pics in one go. But I would think the average is nearer sort of 50 to 100. To put it in perspective. And but the meal with those days will be delivered in in bags. I want hoppers and even they were they would be catching the meal shed. And measured out there. Waiting is an important part of the production, like Remember that we had a weighing scale that was if there was a very important innovation coming into the. To the industry 'cause proves and people just use their eyes to charge a jbutton. Way to pick was but to weigh them to get them to that 200 pound live weight was very important so that you maximize the return from the on. The sort has all the bacon pantry. Doctor, if you are overweight, then obviously you were penalized. You know you're outside the weight range, which was defined for or pigs. Can you describe the yes, the weighing scales I can remember it coming in here. We all had to to learn the way picture, which wasn't easy 'cause we had very old-fashioned pigsties and so I can remember. Having to get them in a knot might let them escape. To weigh them and will be waiting each week. Obviously the ones which were near we knew near finishing. These are the pigs which were virtually ready to go so that we can make sure that we can make up a load of pigs. Nearest to the as near as possible. 200 pounds lightweight. Describe yes, what the scale itself is, just like a like a. Metal pen ready. On on on off which is good news, of course. 'cause it's like something you open the end of the pen and you put the big inside. And you wet. It's very rudimentary, and today they're much more sophisticated. Think it was. It was not every step. Full scales recent Thursday. How many people would it take? 202 two of us? Two of us yes. That would either be my father's brother or, or may I think as well. They should be asked to. My father never got involved. He didn't really wasn't too involved the base now. To say he shared in the process. Say I don't actually stars stars, which which could you describe? Yes they would. They were all made of wood, so they were. They were what Pigsties used to be. I mean pigsties in the turn of the century were wooden. For the lean to roof. I need just I. I'm just trying to remember it, hold about 10 piece, not a lot

of pics today. The whole much more. But the important thing they were all better than straw. You wouldn't dream of having pigs in those days, not installed today. Of course they can be on slacker falls in the. Without strong. Picture did so they would use a lot of strong and we had a straw shat number that we had a meal share. We had a strong shot. And the only problem we had with pics was rat so I can remember that rats were always a problem in in the in the picture is. And we spend much time in it. Now he's trying to catch rats too, to eliminate. And how it happened? Some of the negative. Yes, that's where I learned to to shoot. I became quite a. Interested in shooting later on in my teens I joined up. Shooting club. And entered lots of competitions, so that's something else which I've forgotten that you just reminded me. That I became involved in in shooting. Snowball 22. And how would the lights be disposed of? Can I can remember there probably buried or something? I really can't remember that. But rats were a problem and as there is a beginning to come. My problem again today. You read in the newspaper constantly that the rat population is growing dramatically. 'cause nobody actually bothers to destroy them there. Why do you think the games were so much more advanced in their production? Because they they they they move into Colombia is one of the problems with with British agriculture is it's very uncooperative. I think it's a nature of the of the British British farmer. You know he's more of an individualist. Denmark, which is only about 5.4 million pieces only the size of Scotland really. In terms of population. Concentrated intensive livestock production 'cause they didn't have the landmass which we did here. If you compare us with if you compare United Kingdom with Denmark then you can clearly see that we're in arable nation. Or were never carnation in those days. And the Danes didn't have the the landmass, so they concentrate on intensive livestock production, mainly poultry and pigs. And then is there as a result of that. Influence if you lied that they are politically influenced, gravitated towards intensive livestock production. All their political structures. In their farming unions and then the Ministry of Agriculture Equipment. Um, where move towards encourageing the efficient production of of livestock, whereas in this country the livestock industry was a poor relation and the barons were grain barons with large large holding so. Um and. Not really happen as a result of the CIP, the common agricultural policy, cognitive function policy, and encouraged the farmer in this country because he had the land. To concentrate on the production of of grain. And he found that up until the CIP, of course, he used to have pigs on his promise on his farm to utilize the grain. So he had some sort of vertical integration. He had been able to convert grain into pygmy. How many find that when he joined us when we joined the CIP, he didn't have to have fixed it, didn't have to work seven days a week looking after pigs, which is a pretty arduous task. He could work five days a week or three days a week. Just harvesting the grain and then selling it to to Millers, which would either end up in there. In bakery products or. Being mailed and sent to specialist pig farmers and poultry farmers were in Denmark. They concentrated on the intensive side of their livestock production and they found that by joining together collectively in farmers cooperatives. They were able to control the production of pigs right through to the slaughtering and processing and ultimate selling of pigs. So this better integration gave them much better information. They were. One of the problems of the pig industry is it it's typical. In this country. The cycle is usually about every three years. Um, the reason for that is that the. The farmer, when pigs are scarce, gets a high return his pigs. But the processor obviously makes very little money out of it because they have to pay a great deal of money to obtain the raw material. And then the farmer then gets because he has high returns single. I'll expand my big production so he expands his big production. To an extent where in fact it's become much cheaper. And then the processor reaps his harvest. As the farmer had previously done, and picks were scarce. And so that's the big cycle. I'm in Denmark because they. Were able to integrate their industry. They was not such a big cycle because the profits from the industry. Were really one. By that I mean in the United Kingdom, the profits from pig production was one profit. The profit or loss from a bacon factory or slaughter was another profit. But there was. So let's say that on the pigs back there was £20. And let's say during the. Difficult years for the process of the farmer got 15 pounds of that and the processor only received £5. In Denmark. There was the 20 pounds and they could share it equally so they can have 10 pounds each. That's a rather simplistic way of putting it, but I hope that explains why the Danish industry. What's less volatile? And grew more successfully than the British. And how historic is that? Danish cooperative system. Well, I joined the industry. As I said earlier 1960. Honda, it was really the time when the British industry was waking up is going through a very difficult time. The company which I joined, which was Harris of COM. I was island again by a company called Martian Baxters, which was the I think 4th largest private company United Kingdom. Well then experiencing problems. They had 22 bacon factories in those days. So yes, there is 22 bacon fractures, two largest being at Brierley Hill. There was Martian Brexit right here, which covered 14 acres aside. Largest French of this type in Europe. And then there was Harris of Concannon wheelchair, which again was where. Bacon curing was invented by the Harris Brothers in 1770, but that's another story, but just answering your question about. About where? Where did it start here? I think was in the 60s when I joined because I could remember the. My first appointment was as factory manager of the Dunmer Fridge Baking Company, which is a very famous part of the. Of the Martian Baxter empire. And I can remember us launching all sorts of. Initiatives at Dunmow through various government organizations to try and improve the quality of the British pig herd. And by that I mean we were able to give incentives through government subsidies in those days back to the farmer to encourage him to produce a pig which the market required and the days have been doing this for a long time. And it was at that period too, and also because the importation of Danish breeding start became relevant to the UK industry, because suddenly they found they haven't got the pig to produce the product which

the consumer required, which would lean meat. Cortana today is been working in the Cooperative way. Well, they've been working and obviously I would have thought I can't. I can't be specific because I don't have the history of their cooperative movement. I would suggest to you that it would have probably been in the 50s. This one I think. Because certainly when I joined the industry they were they cooperatives were prevalent then. Now there was one main cooperative here, which I'll go on, perhaps to talk to you later. That was the fast Start Marketing Corporation. Which ultimately took over Martians Baxters. And it then became FMC. PLC and. It's its roots well that it was a. Offshoot of the National Farmers Union, the National Farmers Union Development Trust. I decided to get involved in. The production and sale of meat. So they they started after the war they started an organization called the FMC FMC Meet. That's a 1954 that was when the FMC was formed and it was formed from the denationalization of the slaughter sorting industry once. That the government involvement in sorting 'cause at that time the government had been involved in the war. In production of food. In 54, then it was decided then that. That FMC would sort of be born. And that was born through the NFU Development Trust. Which was the commercial arm of the National Farmers Union? So that was a a former cooperative. It wasn't called to come up, but indeed it was. Our mother farmers. It was a private company in those days. We'll go over that later, but that just gives you a background of where we were with cooperatives as opposed to the Danes. Young fathers and engine setting that up had your father being apart. No, not really, no. It's simply that I had this. I suppose interest in agriculture being involved with it as a young boy all my life. Working on a farm during the holiday season. Driving, combine harvesters and just generally involved in farming and knowing lots of farming people and we discover that we haven't got. A young farmers in in in the village. We live so so two of us started it. Um, well, obviously getting members canvassing people. Um and then joining the the national organization and. The national organization was run by a family called Blacks. David black in Paris in Edmonds and they were the they were. The patrons really of the organization. Of course, in my later I got to know them very well and indeed there were suppliers to to the factories which are. Which I was was involved in. But the flat family then, if you like, looked after the East Anglian wing of the National Farmers Union. They would have things like public service, public speaking competitions. They'd be holding it there farm various in Edmonds, and we'd all go and intern. They compete against other National young farmers organisations. Um, I can't remember. I can't remember, but I did and but it's so long ago with Linda, but the memory is doesn't go so far and I'm not sure if I sat and thought about I could remember, but it was about farming, I'm sure. Having my first experience of public speaking better. Bit of an ordeal I sent you. Remember it was at the Corn Exchange in Barrison Edmonds. I can remember that part. So young farmer. So yes, it was again it was and I became Chairman. They elected me as chairman and we get somebody else's secretary and we had a committee. And then we had done monthly meetings where we would invite personality, underlying farming industries torturous. So that was a learning curve, if you like. It was also very social. Being a young man as I was there and it was a very social thing. And I sent remember lots of. Young farmers. Got married from there and indeed I met my first wife. Rashmi and pharmacy. So it had done that for me as well. Please station. In the village in the village Hall. The same belittle which my mother used for her Old Peoples Club. So yes, that was a focal point really of the village. Input sorted from. Was that? Yes yes Oh yes, yes, and we would have. We would have dancers. Yes, we just remind remember that we had dances and we have a local band can play. So yes. Oh dear, yeah, that's very different drive in those days. Yes, I remember. My first wife was a very good driver. So yes. And then we would have bondanza steps. So that would be more traditional than traditional bar now. Um, I'm at that stage. Also decided to learn to dance. I felt that it inadequate on the dance floor, so I then went to a dance school in there. In Ipswich with my then. Fiance she was in there. And we went to the victors investor dancing studios. And we probably spent a year or so there. I was much more competent than much more confident on the dance floor. What happened in the lessons? Well, yes you do. Open and wife who ran it, but had these schools all over the country and these were professional. Ballroom dancers. I can't remember their name, but they were. They look the part I remember. And then we we each partner, then you see to get these steps, learn the quickstep FT. Then lots of Latin American and and some of the traditional dancers. So it was a confidence building exercise I think, so that I haven't got to their feet. What would you wear to the well, obviously to the to the if they were sort of formal events? We were wearing denim jackets. People dressed up much more in those days. I mean, one of the things about today is life I find is it's a bit casual. I find that difficult to come to terms with. Now I'm like now I'm wearing a suit. So there was more formality. I think that's what I would say. People much more conscious of the dress. And remember, this was sort of the war. Haven't been finished all that Larman. Dress sense was changing and people becoming smarter. There was a bit more money around then. So. Yeah. Watch out for the barn dances there. Would you wear for those more casual clothes? For that I think. Or a tartan shirt. And that was yes, that was the feature because they were American. It was a big American influence. Remember, we lived in East Anglia. And the Americans had an influence in the culture that they make that there would be Americans who attended some of the dances. So American servicemen were all over the place. Big cars. Over pontiacs can't remember the names of the American cars, but they they were dramatically big. There were gas guzzlers in those days, and of course we'd seen nothing like them because here we were still on sort of Austin Sevens and. Humanism. Um, yeah, long time these great big Pontiacs and. I can't remember all the names now because when I leave here I should remember them all. But they're already large cars, many other only two seasons rather had large boots and large bonnets housing the engine and the engine's blue. Get some. So and of course they were. They were very

popular, mostly young ladies of East Anglia, so the locals were definite disadvantage in those days. Who's going to ask you whether you had any sense of? Peoples feelings about these Americans? Well, I think we're very grateful to Americans. I mean, I think that I think there was a clear knowledge that without them that we wouldn't have won the last war, and I think that our parents had sort of realized that. And of course that have passed through to the for the children of the day. But yes, I think that and of course they had lots of goodies which we didn't have. You know, like I mentioned earlier, chewing gum and chocolate domain but. And fruit things like that which they had easy access ability to and we didn't have any, so they were able to win us over quite easily I think. What other aspects of American culture do you think coming? Affected you early. I think probably the clothes I wore. I mean, I remember the cinema was also influential, instigated the cinema a lot in my teens. Cinema is very important these days. I mean because again there was also said to you there is only radio or the newspapers, and young people didn't read newspapers really. So the cinema and there were lots of cinemas in Ipswich. The odinic your mom. I think there were lots of players coming over them all again, but they were there and then you know you would kill to go in. I mean that would be lots of people there. I would go to the cinema sometimes with my mother. That was an important influence. And of course the films were mainly American. One day they were. They were certainly some American content. And again, killing up to the CD Scott of the Antarctic with my mother remember that. At the Odeon and Lloyd's happening with switch. So that's something I do remember. Are there any other films? No, not really. I can't 3 coins in a fountain, probably was another one then some sort of romantic one liners apiece. When I was in my late teens. Um? So. Yes, the cinema I think did have an influence. Did girls wear to the young farmers? Well, that was it. Cost in the later 60s it was miniskirts wasn't it Mary. Quant and miniskirts were very prevalent. Um? On girls, I think there was more perming of the hair. Of course in those times. Put on I'm left with a mini skirt. Skirt is the is the prevalent female attire. Certainly things like jeans and slacks work one very much. I mean, even in the sort of. 70s you wouldn't dream of seeing a woman go to work in wearing trousers and would always wear a dress or a skirt made today you find difficult to find a skirt. Your parents. What was their attitude? Do you think to your future? I think I was very much on my own in that sense. I mean they they done their best for me. I was in an only child so I was privileged in that way, although we weren't well off at all. As I said, you know we didn't have. I even have a bathroom in the house and it wasn't till I was 15 and we had that. So, but they done their very best for me. I mean I look back and think you know, they sacrificed so much for me. There's never been that I bought a scooter. And. They helped me to buy that and I can remember my mother knocking the scooter over and breaking the windscreen. I can remember that issue was in, you know, 'cause she she had to find the money to to replace it. So I mean they were saying they were Paul was wrong, but they certainly went well or they're right through the learning. Like hey good people I have to say you know very good people. What about in terms of your? Your future sort of career and family life with well, I done well at school. I think that obviously I I was kept in my house. I was school captain. It's a big school there. A lot of them are probably 500 there, so it's quite a big score, so I don't quite well there. I said I wasn't academically brilliant. Sort of average in every subject. I got a mental math site. Remember that in English wasn't too bad, but I would say it was around people but not exceptional. Um Ann and I hadn't any perspective at the window, So what I wanted to do really I was interested in radio, of course. So I suppose that if somebody come along and said you know you could work. In the radio business, which was very important those days, 'cause television hadn't started and everybody had a radio then I probably would have gone for it. But now I think that he I think my father was pleased that I joined him. Because there was nothing else on the horizon. And I had quite a good report for school. So saying what I really ought to do. And my father employed about 10 people and and many of those when I was working when they used to say, well, he really ought to be doing something better than this Horus. You know he's you know he's able. To take on something. Better than just working in a nursery, but nevertheless I stuck in there because I had to go and then do national service. Photos ITC so. I then decided to to go rather to try and get to 30 'cause you could get deferred. In those days. You could if your occupation was such, you could get 30 or 21, but I thought again. Maybe just after this year's affair, that was when don't you remember that? We had a. We invaded Egypt. And that was just the time when when my national service was coming out, and indeed and I spent all my national service in Cyprus. Apart from my training. And when I first arrived in Cyprus, they were still the remnants of the. Up the large numbers of troops and Air Force personnel which were sent to fighting their food. Sue's war. That was, Anthony Eden was the Prime Minister of the time he took us into into that war. Which was which was funny. So how much did you know about this? Is crisis what I need because it the radio again, the radio, you know, we knew, you know on and I remember having a radiant was portables are then available and then I remember in the greenhouses weapon hearing the you know. The troops going in. They were they were airborne troops coming in and the parachuting down and thinking, well God, I could be among them not in there in a few months time. So I think my parents will be worried really. I'm worried when I was in Cyprus 'cause it was in this height of the emergence in Cyprus, but. Take some notes. So yes, I think it was. It was a difficult time for them when I went to the services 'cause it was on. I was on active service. As opposed to just spending my time in the UK, which most people did I. I got sent abroad on active service so that was a warning time for my parents 'cause there were a lot of people killed in Cyprus in the early days. Find yoga. Do parents and talk about politics at all? No, I don't. I don't think they did, really. Cosy. During the war it was Churchill and of course you know it was an autocratic system of government. In those days it wasn't up and we talked about a democracy, but really? The the average person

wasn't involved apart from their voting and they would vote, I think, based upon what their fathers did. I think there was much of that. I mean, I think that. You know about it, as my father did I banked at Barclays, 'cause my father did I think there was lots of that that's changing there cause people developing. Great deal of knowledge, either from the Internet or in the back. What they can do and not so. Constrained in moving to another bank or another political party, but in in my youth, I think that most people. Went the way their parents did. You mentioned that your mother was religious. Was your father? No, he wasn't. Now he didn't go to church where my mother was very good. And indeed I was confirmed as a in the Church of England and. And in my teens. So my mother, yeah, she was a regular church attenders at their local church. St Andrews church. Where is the Daniel my family buried so you know when I go there? Every year I go to my mother's grave. And I always look at all the other graves of the family to see how they live. And that's where I should be buried. I think I've made up my mind to be buried in this time, so we're all in Russian is an Andreas church. Will you? Yes I will. I used to go to Evensong with my mother. Yes, so you enter every Sunday night we would go to even some by half and even now when I go to church now was it? I live next order a church? Um? Well, next over 1 to a church and. I know the service by heart, I don't have to use the books at all. So yes, that obviously that was the influence of my mother. And indeed, I've still got her prayer books. And I still got the family Bible, which has been, I think, through three or four generations of my mother's family. So that I would suppose that they were all God fearing folk by my mother's family, but not my father so much for my mother. Put your memories from voice of various memories of national service. Well. I think square bashing as they called it. Um? And the shock of it already, I think 'cause I don't live at home. You know, and it's see it's the period of transition from really. Boyhood to manhood is natural. Sounds how I describe it. It's the best thing I've ever done part from. Obviously my job. Um, because I think it was a very formative time for me. You know, it took me away from my family. A lot of them was stationed in RF Nicosia. For my national service and. That was an important time in my career, I think probably in my life, because I then became much more independent, much more self sufficient. And I was able to test my own sort of. Parameters. Both in day-to-day living and work and work environment and I done well, I I. I was just a national service and I eventually became responsible for all visiting VIPs to the island of Cyprus. So I had the opportunity to meet many. Famous people, including people like. Randolph Churchill I used to see him. He used to he was a correspondent eyes to see him every every week. He passed through Cyprus from somewhere other. Got quite friendly with him. And I was there any pretty service. I never come into contact with with the kernel. Grievous, who was the head of UK or in the embassy, was declared in 1959. I was responsible for escorting and from the island. So technically I was only service and ever to come into contact with him and he was rather a small insignificant man. About 5 foot five tool he had plus fours on remember it now he had a. Red jacket or a green jacket and we had a red Berry with the words ayoka embroidered on the. In the center of it now remember. He playing came in from Greece. Becausw Yoko was its aims and objectives was the unification of Cyprus with Greece. So it was clearly. Greek government. Motivated and indeed when when the plane came to pick him up, it was flying the wrong flag of the liens which was the roof roll family of Greece were there came there to meeting? To take him away from the island so that proved to me beyond that that Greece was completely behind the. The terrorism which had been. Perpetrated in cycles for the well all the time I've been there, I've seen some pretty horrendous is not submit. So where? I it was. It was a very formative years for me. I am one of the things which happen. Mentioned early was key musician, King, pianist. And whilst in Cyprus I formed my own dance band. Colin J5 it was called. And we played at. Lots of sort of civil events, weddings, and we also then had a regular spot in one of the night clubs in in Cyprus. The Ledger Palace Hotel, which is the hotel in Cyprus. We were filling. We won't make bags. So that was again an important time for me now, so. Money as well. Couldn't enter. Yes, we had. I played piano. We had a tenor sax. We had a. Trombone. Then we had a double bass. I'm here drums. Am I right? Let's do that. I just know it wasn't tenor sax, so it was a tenor sax. It wasn't Trump on, it was a guitar. Music, music, Frank Sinatra stuff. Interested in a foggy day in London? Time that was also signature too. So what? That was the anger of course of Frank Sinatra and. This contemporary case star. So yes, that was that was an important period for me. That got me really interested in music. Up till then it was sort of been enforced through my mother making me go to music lessons. And what did you wear? Uh, I I think may must have been civilians like this, but I can't do that if it was only for any for something, then I wear my uniform, but I think it was meant to be. I remember it wasn't emergency, it was active service. It was if we work and outside it was a bit dodgy and had to be very careful. 'cause there were lots of lots of. Murders in there, particularly in inside. There was a there was a part of Nicosia call Ledger. Road and it was cool. Murder mild in there where you had to be very careful trips or just being shot in the back and. And I'd seen with I I I'd been a nappy one evening and. In in RF Nicosia, when a bomb went off and. I like somebody's leg, flew past me, and it was really so. We had some pretty bad. And then of course the IT was a very large Air Force Base. There were probably 4000 and personalities. And I was on the staff of the. Of the C&C. I have ice Marshall. So who Patch and? Since it commander in chief, he was the commander in Chief Middle East Steven. I was on his staff. So hence my job looking after VIP. And. This was in an in and after I was on I was on duty that night in the nephew and this this bomb went off and then. As a result of it. There were lots of civilian staff support staff and of course the the. Personnel turned against his business staff. They got the cars. There was all sorts of things happening on the on the on the site that night and from there that day on there were no civilians are employed and they had to bring over. Civilian personnel from the UK to man the Nefis and all this the billion

activities which previously were carried out by separate workers. So I do remember that. Sorry, and I do remember, you know going. We used to have to go to Thegovernment house to the. The name of the governor was Chuck Colson, who foot he was the governor of Cyprus then. And I remember one time going over a culvert and we just got over the call button. A bomb went off and brooked. Let's say we very lucky. So I can remember that it was a dangerous place to be. I wouldn't want to deposit anything like the. Lost World War. Don't get me wrong, but it was. Terrorism is A is an awful thing for those people in Northern Iowa. And it wasn't. It wasn't much fun in Cyprus in those years, but there will be a wonderful climate. And. And I wouldn't miss it for anything. 'cause when I come back I was a different person. So what was your state of mind while? Well, when you're young you know is only 18 and 19, so really. You know it sounds more harrowing that wasn't actually. Was this time you're not to? When I used to have to search my car every morning because. That had to happen. Putting bombs in in seats seats. If you take a sick day to the car they have. They have honeycombed spaces in you know the foam inside the foam inside. And I remember that the. Military police occasionally split lectric light bulbs in to make sure that I was searching the car. Things like this. I can remember that, you know, make sure that at least have mirrors. To search under the car for bombs, but he didn't. Today probably have a big impact on me, but a bit and then everybody else listen. Who went to national service but we like to take with you. Nothing really. I don't think they mean. Nothing really. I mean you had some civilian clothes you took with you, but remember it's a different climate so you very rarely wore long dresses. You in shorts most of the time. So wonderful climate so please. Beautiful, beautiful island divided because it was an even more so now by the Greeks and the Turks. When they were living together prior to the emergency and then of course as a result of Greece. Putting any OK then of course there were lots of murders of Turkish people and eventually of course the island as it is still today divided the northern part of the island is in Turkish hands can't go there, whereas when I lived when I was in RF Nicosia Kyrenia which are the Northwestern which was the resort you used to go down to. Two or three times a week. So. But you couldn't take him know to answer your question. No, I don't think you really want you could you? Could you could buy things. I mean I got interested in photography when I was in there, so I was able to buy a camera from. To get tax records. Was being in the rap. I could go to lots of places. I went on holiday because I had missed my annual leave my. Micera laid me to take it in one large stretch in Israel, so I spent. Two weeks on holiday in Israel when Israel was really at the cabut stage that. It will sit. There were lots of settlements and people sort of just normas naturalistic approach to life in Israel in the in, the in, the in the late 50s. Wonderful place to visit. Did you come across Jewish people before? How do you come across, you know, just say yes, my best friend who helped me to run the young. Energy when I was in when I went there, I did look up summaries relatives. Um? They were. There were some people in our area in the RF station my my of one of the group captains was was Jewish and I remember him asking me to go to see somebody in some Zionist organization too. Tutor. To have dinner with me, arrange for me to go over there. So yes, yes. Quite unusual to have. Jewish farmers I've really thought about it. I mean, this close friend of mine was not a farmer. He was a market gardener. He had a market garden so. Um? Sir, but I don't know. I haven't really thought about it. I'm on console. I have met many Jewish farmers. Well, I know many people who choose your own farms, but I wouldn't call in farmers. There are people who made an awful lot of money. And then put it into the land. Who would impact your bag when you went to national service? Hope you had a thing called a kick back and that's that's a big round sort of associate looking thing. Have you ever seen a kickback or that everybody had a kit bag? So in that you would put all the things my mother my mother used to send me food parcels they like, remember that. And she would write to me. Sort of weekly, really. I mean, I, I think I've still got the letters 'cause we found all the letters when she died in a box. So I've still got all those. Remember the address BF PO52? I can even remember my service number 4191005, so some things do stay with you all your life. But I can't remember exactly what's in the kickback, Linda. Did you write to her? Lots of woman she wrote to me. But I would have written, so I suppose on a monthly basis, yes, I think it would have done yes. Hello. Things which went to Paris trouble, obviously because it had to travel to Cyprus, begun by see 'cause when I first went out to Cyprus, I didn't get my. I actually went on the Empire Clyde and its last voyage. So that took several days to get to Cyprus. Letters would go by email, but parcels I suspect will give birth by C. But I can't remember what was in there, but there would be, you know. Thanks biscuits and things like that. Things which were had got a shelf life. I don't think any home sponges or cakes or in it. How would you say goodbye to your parents? Well, we had a local friend of my parents had local friend who lived on the he had the land operates next to ours. His name was Pharaoh and he also had a taxi business and so they would. He would take me by taxi to it, restart railway station. And then I would travel by warrant issued in those days are a warrant. To any way you want it. When I was serving in Cyprus then I would come home I was. People are going to get free trips home. Didn't have many, but had affair. I came home by Inna Canberra ones kind of jet which was quite something 'cause I'm leaving it on one of those. That was a bummer that Palmer so I came over that and and. And I went into line and I think and and and this chat alright came to pick me up so my mother arranged outside. Remember that. But mainly it would be by railway wind. Do you plan to come in the taxi to see you off? I don't think they would know. When my mother we used to be very upset when I left. Obviously only signed and going back to Cyprus which was, you know. I mean, remember in those days though. Television 50. Yes I did. They would be sitting on that Ellaria Sand television president. I think would be seeing sort of gruesome sights of you know people. You know there's the whole place was, you know? In in fighting me

because it wasn't, and it's like all these terrorism that breaks you know there sometimes quite a long way away from where you actually are, but she tends to think. Of course, they're all around me and. Every day I was walking in danger, which I wasn't. Yes, it was difficult for her, I think. What happened, what would happen when you came home from Florida Coast and all the all the families see there would be lots of family then be uncles and aunts and people to visit. I was exhausted. I was glad to get back up. Then I'd made friends in the RAF who whose cost being the mob since I've been there, so I don't see them anything there. What are the chances that called Driver was best man at my wedding? So yes, I mean they were. They were friendships you made in their area, but I haven't. I can't say that I've any of them left. Now they've all gone. Hold on, I've often wondered what happened to them because you've lived with people in close proximity for a long time, nearly two years. But they've all got lives around my space and will be dead now. Why do you think? You got the job of looking after the VIPs. 'cause it was very smart. I think that helped remember my headmaster saying he should always be employed where his appearance. Kent, so I think that helped. Who's got on? Well with senior staff. I was I don't know I would have the ability to get along with people really. I think that's where I learned about it and getting all my people. Also was able to. Impress is a wrong word. It sounds arrogant, doesn't it? I don't mean impressed, but influence perhaps would be a better word. And. And that helped me enormously, obviously because my whole life is mixing with pretty senior opposition over some people. You know, five star, five Star rating, which is the top. And that's just the way people like you are either just been fortunate or into the right place. The right time I've done the right things and their careers to get where they are. I think that's what it careers about. Really. You should never get to. Having a false illusion of what? Powers are bad. It can be taken away from me very quickly. Quicker than you've been given to you. Sometimes I think I was trying to remain quite humble, really. And my parents are like that. You see, my mother was like that. I think it's the best way to do it. 'cause my one of my predecessors in FMC because I when I started in FMC as a set of 1960. In the mid 60s employ 12,000 people. And by 1977 I was Chief Executive of Harrison. By 1980 I was Chairman and Chief Executive FMC PLC, which was the company and my one of my presets predecessors was Sir John Stratton. Which will talk about it later, but. When he. Was ousted from a position as chairman within a year. He committed suicide. Shot himself. 'cause he couldn't cope. Is not having power but not being. In commander not being recognized, and that was a lesson to man. So you know when I retired I'm just a normal person. Translation can you say you came out of national service in your different person? Well, you can imagine I had lived in the confines of my own family up until 18 and then suddenly you move away and I'm sure if you interviewed, other people have done national service ever saying so. They might gradually, so that's two years out of their life. But I think it would be a wonderful opportunity even today, because I think it gives you disappoint. It gives you a self sufficiency, give you a whole range of skills which are difficult perhaps to define. But never less are evident. I can usually tell if somebody's doing national service. I think discipline probably is the key factor. People are more polite. I mean today in today's society people are not. Very polite people are employed. Certainly the people of my generation. I know education is more to do with it, but national services apart eventually. I think that people are definitely more polite and more concerned inconsiderate about other people. That's one of the. The benefits and also the ability to be able to get on with other people 'cause you have to learn to be independent when you become a national service. Until then, you've been fairly independent. Talk to your family. So yes, I think it does a lot for individual and because my ambition was much greater when I left the RAF after two years and it was before I joined here. How do you think? Well, I think I've done quite well in the rap as I've done well at school. UCI become school captains. I've always been quite good at. Not getting to the top, that's the wrong word, isn't it? Wasn't at the top academically. Put in there at the same time you know I was in the station before 1000. Stuff and I had him. I I couldn't. I tried to volunteer. If I did so I would go to. Two more permanent position in the rap. I did almost volunteer to to do three or four years. If I could have gone to their crew, but they discovered was I was colorblind. So I couldn't do that. I'm not sure I made the grade, but I didn't. I did go to to Cranfield for for a day and do something I think I might have got grandstaff but that may not have to sign. I think for five years, but I did. Did they thought that after it? Because I quite enjoyed it. So nevertheless I am. I then just completed national Service, but I think the reason that I became more ambitious and because I was able to do quite well. From from a new beginning. At in Cyprus. I'm just. Just an AC plug sends everybody else and manage to. To get a very good job and have an interesting time. When I was there. Bit dangerous. Where Craftsman, I mean my rank was I finished up as a as a corporate. Also I didn't finish up as I was non commissioned. You see so. Um? But that's quite good for serve national service when you see. We don't normally. Other than not really keen on encouraging less, you could've volunteer and do along appearances. Who's your ambition? In terms of what you want to do. Not really, no. I think it was at the right time at the right place and the. Opportunity to become a management trade houses which sort of attracted me because of my young farmer interest because of my agriculture interest because of my father's. Attachment to the land in. In loosely anyway, all you know gravitated me towards this particular position. So and Harris was a in those days, the Martian Baxter said Marshall matches a fourth largest company. I think in the United Kingdom, and Harris was well known and all the all the represent representative world bow ties. For example, it was. An organization to join in the food industry that was. It had 22 bacon factories. You know, someone very large, employed a lot of people. I'm sorry. I joined that this is only 96 in management training. And they and the great thing about Martian Baxters as they really were, though it's the brand name is Harris, but they were owned by Martian banks. Is it they insisted that their managers could do every task in the

factory. So I had to spend. Or was supposed to spend a period of two years and that meant right from working in the large slaughtering pigs, dressing pigs? And then doing all in summary production which is bacon curing and sausage making and pie making a whole range of. \*\*\*\*\*.

### **Tom Hixon**

Knights of December 1998. Louise Brody talking to Tom Hixon. Could you tell me when and where you were born? Remember 9th of March 1919. Tell me that about your family with you. My solo was a butcher hello. A shopping list. Olympia St moves which is a marketplace and isn't quite a busy place and my mother was. Daughter of immigrants who came over during the potato famine, and she also was a moneylender which I was. That was a big ask about because she couldn't read or write yet. She could keep, you know, head exactly. You know people would have done things out that I was. Alona wonderful woman she was. My father's family were. My grandfather was accomplished over at the Bank of England that used to build all the doors and all that TV show. Really a very good counter and. His family were involved with the Bank of England, but my father was the one of the butcher. Although one of his brothers did follow him into the market at one time and my father went into business on his own roundabout 1924, I believe, and we came across all the problems of the. Trouble a general strike and then the General Depression which was, you know, quite terrible and he eventually finished his retail business about 1932 and. As I left school at 19. 23I look around what to do and I eventually went to at work today to express as a office boy and did four years there and the Union wouldn't allow me because nobody in my family were in the Union. Then that's open those days in with you weren't allowed to be comma union members, so my father he wanted me to come up the market, which I did and went in the lowest form possible as an awful boy. And. Within two years I was running a Department so you know, had that little bit of background which comes from family. Although you don't necessarily talk about it, it comes naturally to you. So I went on the market and I started with Loverboy and as I told you. Couple years I was that in charge of a Department and this went to progress up to the wall. That's a very good summary and fascinating. I want to take you back over that anymore. To your Gran father, this is on your father side. Presumably the Hixon that's right. Why did your father not follow your Gran father and become a Carpenter like him? Do you think? I think it was a little bit of a maverick and he wanted to do his own thing. He was the oldest and probably had to go to work fairly quickly, like most of the oldest children did in those days to get a little bit of money into the family. So my father did that only 'cause he went away was in the First World War. He came out in 1919, play with and then he went into the budget. So he started at the bottom in a retail shop. Did he or did he? Did he tell? But that was part time like that. They would like 5 days in the market Saturday. Probably work for a butcher where they had a little bit more money. How did your father get into the market? No, but I do know that my mother's family also had a brother in the meat trade. They're so it may have been that they, you know, said to one another one and you come here so late, because those things come through are not easy to find and my father was a very good word. Excellent work. They never stopped working and I feel that you know wherever he went he he was good value to the firm. I won't watch the same. He worked for company American Company which isn't very large in those days. And then when did they send this? My brother is wrong in the depression. He went back into the market. Needs to cut. Music alone. All day long. With a cleaver. Unbelievable yes, please turn up three. Underline today is about to call you. Trust it, you know. It's fantastic, I had cannot see them please to put this tear into them. Chopping boards face somebody from overhead. Sorry your mother, sorry for that. No, I am. Who is the model and the way he wants? Because there was never a time and anybody could work harder than that. State media there's a way to to work myself because, you know, we work very hard in our times and we benefit by it. Tell me more about watching your father work. When he was in the Easter was on the House in those days were unbelievable 9:00 o'clock at night you still be selling out because there was no such thing as refrigeration, only ice boxes. And if you were lucky enough to have a weekend when the weather turns very hard. The icebox wasn't good enough. And that was one of the problems that didn't finish him off. Eventually. You know whether with the lack of refrigeration that I used to watch him cutting and. Um? Also go on the front under so I am from trifles with chop something I left. So I got a little bit of salesman technique in a marketplace. Street and shop with the install in front. It was open open now and used to. They delivered my field on the whole SIM card in those days. Local SIM card. You could tell that I'm never gonna be there. Traffic and they be loaded. Latency 10:00 o'clock. You look up amino for whether it be turned into call. It was marvelous really. Those damn precision that was about with the lack of. How do you think very mobile? Your mother, you say, was a money lender. I'm sorry quite right. You did say that my mother. Was the book binders. He did gold leaf. I believe she was told to send or she did. Once you. She never worked. I'm nervous. Two older brothers and sister had a certain lady. She was very busy with us. She helped with all the women he needed help. So just going back to your grandmother, this is the grandmother who was married to the Carpenter Hixon grandmother was married to. And then I will stick the ISO in. And so just just to clear up the Hixon side at the moment your grandmother. Um? When she come from grandmother. In Dubai. And they grandfathered under Canada. I see right? So then? Grandmother Dixon. Who was she? She was the Irish right? How did she become a money lender? Really don't know that. Assume that. He had a quite a large family and I think it's something like 12 of 13 children. And then those days, nothing simpler. Guide and let me just. Probably started at 2. Got a living color, my husband was. Uh. I put my group

the Element Council outside there and also. On the Old Elephant Council public House, which is not only now but it used to be in the middle of where an island in the middle. Over there. I don't think you ever seen it. But uh, it in pictures. I mean, it was an old. I'm on with the traffic background. I see spending, so that's both the sort of money. I mean, the the book makes. Yes, it probably surprised on the money. Went together. Did you know your grandparents? Well, you know, yeah. I think if I remember right, the first one, my grandmother, the Irishman. The 1929 so. 10 years old. Under yes, we went regularly to see them sometimes. One is that lived close by. Kennington was about probably two or three times a week and. Always went on a Sunday too early by my love talking on the transition. Spell trans. Slender. How did your parents meet? I really don't know that. I've. I know they used to talk about going to a dance troupe, the elephant car somewhere like no, no, no. I think that was working properly, but I I never question are those sort of things on the menu. But labor well suited. Her mother was in charge. He worked and brought the money. A good provider. Remember, the breakfast is pleased to home when he used to go to the market, come back and on the way back he buys because in the shops open in the mark. Anybody salsa didn't think I'd let him bring up liver that he bought from, you know, for the shop and then go home. Ignore miss breakfast. Drinking most looking at breakfast I get these days. So silly. That would be for the rest of the day. Breakfast was a very big deal. I think we will really, but we will begin to generally and I I can remember the. Mother, you know whether making steak and kidney pudding, little outsourcing which are for children, you know you felt that you could only get up from the table. That was the way they lived in those days. 60 when it says readily available and so on. Swing so cheap. Yes, that's a big change, isn't it? But we don't have a supermarket website. Very true. Very true will come onto that. I am so born in 1919 and as you said, the depression years through the 20s. What do you remember about those years? One of those things that I remember is a generous life and people going to work and coming back on Laura's and things like that. And I can remember right as at the end of the cars I saw a vehicle turned over. Things all at one time. It was quite a hectic time because the food for children like ourselves after school and that was something they go and look at. But that was the most thing and also the thing all the sticks in my mind is Derby Day where the coaches is to be going past down. But the world going to Epsom Derby and when they came back at their wedding anniversary now, coins to the children and they go. Wait, wait. Well, yes, we lived in a place for practice, doing well in school. We lived in a Friday night and we. That's like saying about 100 yards away. They collected the coins from. Sometimes with quick enough. Despite the other people there, did you understand the implications of the general strike? I remember the business about the minor or something like that and. I'm a. I've always been the divine and sort of thing that I didn't like the idea of me. You know the violence, but yeah. Took place in those days. It seems to me that other people don't lose their mind when they don't know something. Will your parents political at all? My father was a unit is doing it one time and he always voted Labour until he died and I used to say to him why are you hiding labels? Are what are they ever done for you, you know? Google is better and. You read I got here before he died. He came up to me. But that was it. You know the end of life, actually. Bye. So. Like a party operating locally and let them know I wasn't very impressed and then. Cortana people that are talking about. You need level suction thing out that label defended by like a party. So I was always a conservative so you know, rightly or wrongly, I came out the army and I'm never voted anything else with conservative. But because I believe in personal freedoms only got that which it the unions don't give you for personal freedom. And we used to have to employ people. At the same layer. Money. At 19, as a man who's been with me 20 years things allowed and not allowed to do any different. You know those sorts they can't believe is freedom from there so. I'm a bit into you. Spotify. And conservative. Sue, you want school in Crampton St? I was there until I was nine years old and. The fact that we were Catholic. You know, but when it makes marriage with my father promised that they don't let you have to promise that the children will be born out this Catholic. So at 9 years I will and I was able to. My cell phone went to school. There's some in the Blackfriars Bridge Rd. Under education there. And was that a good school? Very good answer. Discipline is good, which I've always believed that. You know Lee. Schooling begins with discipline, behavior, self. Get on the bus. You're missing something on that was my idea. And we had done a lot of. All teachers will fail. I like to do that. I mean I got plenty of things out there, but I'm very, very fast. So you thought you deserved it when. What sort of things did you do? Dissipating some things on that turn down. Please do argue in the closet times different boys. No, nothing say really serious but. Whatever I got, I never complained. Yes, yes. Unfortunately, most of my past on the night night one very good friend got killed in the war. I made a lot of friends. Will you have the boys wanna go in school that's funny enough, my wife, but the girls doing I didn't know that you stayed all the time. I was in there. I didn't know they were completely set ram complete. One result by the numbers are numbers online. Male teachers in there. Sometimes we had about mother called Christian Brothers in color. And so you say that you were Catholic. Obviously your mother was a Catholic. Do you believe strongly? Religious person, I I gotta charge yes, I do believe very religious. I would like to say that because you know in life there is something that you are doing. What you you don't feel that are in line with the you're teaching but have to be done so you know, I I go regularly to mass. I love my children older. Play moving board numbers. Translate I can tell tell with them because you're not behind them all the time. So quiet. And then children to a Catholic. Obviously sets are very strong example then. You know? Certainly the number and they got proudly. I'm not sure. Yes, do you see this blue responsible? More than that? My problem wasn't, you know, I was working so hard it was working sleep. That was a thing I regret now when I see my grandchildren. Playing with my phone, my mother, you know, like I never had that opportunity during the day.

Weekends probably. But that was, you know, like. Yes, it is very hard, isn't it? I mean, did you have to work so hard or was it just ingrained in you that, um, no time in those days there was nothing to work? Building houses on a Monday. Type after the week. But um, it was Papa job. See. Specially because there was no cold storage and that whatever meat you gotta go. There was no recovery of a potato chip. Hello, let's define another day. You had to do it. Play online. So. Eva. Take from 5:00 o'clock in the morning till one or two o'clock in the afternoon, trying to clear the meat, and then after that I'll be the question of. Contacting your suppliers. Running in crisis. My counsel is something that came into the, you know, reason why he was work so long. Yes, quiet. And so you accepted it as a part of life obviously result. Problem. Sir, you went to Saint Georges School. Did you have any particular subjects that enjoyed school? Yes, it was very good. At the time when I was 14, I jointly. First in the class. And. There was one other. Meeting on the shelf, then we will join first. History was really good. I was like in history. I think some, as you know, very good, accepting the algebra and things like that, which I found about that. Kimberly, I have. I think I was just let's go. I always have a good memory. I got that from my grandmother. Yes. All the books and I had. And did you know what you wanted to do when you left school? Not really. I really you know with my mother. Those guys in the library sign and I think I went onto a job which I didn't like. It was lemon tea warehouse in the basement and that wasn't signal to me that she thought when I sent you over. You know I wasn't gonna stay. There will be a waster and. Then I got this job eliminating space, which I very much enjoyed because it was four years experience. Not only of London. You know, I go into delivering things in London, seeing people with John, you know, every day in the newspapers and let you know that look like terms. And there's some editors and editors. Famous people, but they are. Well, they were in my lifetime. Christian so John, I remember now standby was along Beaver buggies to come here in the Daily Express a lot. Is to see him and his girlfriend, Olivia de Havilland wasn't. I think Siri is under. So. And there was a physical load, good manual at one stage with a politician. I believe one day he was solicitor general or something on that he was a solicitor in the den expense I used to work in The Newsroom and eventually went on tonight work. Well, probably I'm not used tonight, so used to do what we call the dead watch. It was 8:00 o'clock. In the evening to 4:00 o'clock in the morning. So what did you actually do? I actually looked at the scene as it comes through from America with the exchange Tony Bar from people like that, where the news that come up on you to turn off the paper and take it to the appropriate may infer their chief some other than we give it to them. And there was not dealing with that sort of thing. But night time it was only. Probably sinful people and it was quite. He got to know people. Get a little things. Development. When you say it helps in your development, you mean to or knowledge of London. And also. You know that I got to the stage where I think I couldn't reach out my report if I was allowed to. Because I, I mean so several things which are reported in a late pay before. So you know that I felt that I could have done that at that stage, but it was the unit there, probably again. Which are, you know, I'm willing to, you know that the fact that I had a good opportunity there because that's over said that you know you can't be in a Unicorn. Your money on. Only a baby. Yes, I'm not surprised they were very strong. Similarly like controller. Unbelievable. Nothing today only. Technology. But I mean, it's quite interesting that that difference with their presence felt everywhere throughout. Not really, not really, no Department. But you know when it comes to. Will you be in the? Part of the stuff you had to be in the unit. And the. Hello wife. You know, on the four years I was there, I went all over the place in London for delivering messages taking. Money home for peoples wives and think about when they got paid because. I got the Bills paper link on that, but then also you know is always at. No big books house, which is somewhere nearer. Um? It's going away. Just be on the mouth is the Palace is it? I was feeling just a little over. Yes, I remember going there first time and knocking on the front door being told by the Butler. My place around the back. Did that. Don't worry about it really. Video. Welcome everybody. You know, I just went up there to deliver newspapers to him. Even before. Let me get on to the other TV. Did somebody the light? It's interesting that you enjoyed that. I mean, you you felt that you could have been a writer. You could have been. Porter, young Don't let them. I was interested enough to see things happen and try and report them and ignore that. I think 3 times I got something we probably would've got printed. But you actually wrote it. And lately for the information they needed. So my love I'm gonna stay with 1 pound 5011. Call of Duty important away games. So when did you leave the Daily Express? Yes, and that would have been 1937. In 37. Under 30 seconds. And what about your home life at this time? Sign in I am. But the fact that. I work so hard lately my time off is virtually when. Is carbon playing football and single level with those sort of things that yeah. At. The office when we weren't busy, we used to play cards so you know that was part and parcel of. That expression See I had time on their hands and just like what colors did you play? Type so Bolton and also later. Will get mine again. Monica and you enjoyed your football. I remember really good. My sons are very good but wait. I was probably had too much weight in beginning to money please thank you. That sounds quite likely. And so the youth club was what went down in Kennington, was it? We took a little Easter egg more almost right. Right? Play love is well, my wife. I was at the club. I see I see. Seriously? Say well, what about girlfriends then? Really. Yes I will. We were married 49 years. And. I knew her. 19 some 677 miles was it was, you know, the time when I moved. Number that is like this. Really, I love when I'm at work. Super song. And another came over. Family I think I'm over. We will find the family. \*\*\*\*\*. Very much. I'll probably miss anyway. And what was the for the girls to do in the youth club? What was she doing? Sing at the time we were arguing about football. Because if so, I supported in those days Millwall Football Club. And most of the other boys were not with the more glamorous clubs and. See, we were arguing and she said. So having him

taking your wife to Millwall football, did she enjoy it? First few times we went under. Um, we must have changed many times. Need to go to the cinema in the week and. I was always cut out with what I could do during the week and. I sleep at work, really made all the changes. You know that I could do it so every Monday when I arrived home I had my meal and went straight to bed. Settings about late morning coming over. On a Tuesday, I still got the best thing on my mileage to wake me up, sometimes in winter. On the Friday night we always went out Saturday, but you know something. We had to look forward to mothers work kinda thing and then you went to church. Which church did you actually attend? Acetyl quite a lot and also some will freeze which was between us. Socialism. Did the parish priest play a part in your life? Did it come up? Much. The two brothers and. Well, he was borderline selling over \*\*\*\*\* some French Connection or translate. But yeah they used Bob. Yes at home. Mr Visit from Facebook. From the more lesson consider we drove by my mother. You know I have no friends online. And also we. All my cousins that we don't play the church for teams or League football. Football player. So if you weren't playing, you were supporting anyway. You left the Daily Express and your father took you up to listen. For company opposite where he worked in company, I look from the language Henry Gillum Limited. And I worked there from 1936 to 1963. When I have my own business, my goodness I see. Um? What were your first impressions of Smithfield? It was, um. When I first went up, there was only a shut up about 9 years old. I. So Mama, so see this. Break from all over the world, but once in those days from all over world, you know you never very few places you could say that meat wasn't coming to Sheffield. And. I can remember, you know, quiet all the South America, Chile, Patagonia, Brazil you were great. Almost all the people are sending me to Smithfield. I'm mainly on Commission which later Hologlight Lamelo collector but. It was wonderful to see all these things and even pics from China. Companies to come over my house. It was unbelievable that the mixture of meat that came from all over the world. But because it's written over market. And. Controversial, unbelievable today. There is nothing to what it was in quantity. And the. The amount of meat we used to distribute went from probably. Write down the first Cornwall up to cars, Norwich all the South Coast came from the Central Market. But today this market all over the place. And so for this last a lot out in that. But it was a fantastic place, and it Christmas he couldn't believe they did the shows of meat, which is fantastic. You know the quality, quantity, trouble everybody went through to make it a festival. Tell me more about that. Only 100 times fans would. Put on the show and it would be the carcasses. Awful, and even things like. So it would have. Merry Christmas and kidneys. Alright, something's really. Ola. And. I look forward to it. You know, from weeks ahead, let's see the shadows on people used to. In those days are awful. Lot of measures even overseeing is devoted to have a look at swiftel because it was the largest dead meat market in the world with no facilities. Them for killing animals. So you know it was the most fantastic. I forget how many thousands of tons went through there every week or every day. It was enormous. And it was to me, wondering. Was each compass marked with where it came from you? How's the weather? Originally from. Australia, New Zealand. Doesn't think about Tasmania will be mild. And then he went to Willie. Sounds Americas, Canada. We had made for me. I can never meet coming from Canada and my son this year called in the first night I seen from Canada since probably about 1930 seven 38. Why don't why it's not working? I think it's not because of the market was not strong enough for it together. A decent thing under a lot of countries that they developed 'cause they have more meat themselves and less was a surplus in the early days it was a question of getting strong currency. Otherwise, let me go to sleep. You set up quite so rightly obviously that there was no refrigeration. These carcasses. Bye bye. And very often it you know if you had a show car show of meat. Before hand you get a company to stay out late. Right before this show that we would go to there and you have a black on that, this is soldier. So you do have some company or something like that. But if it was coming from weather ships, refrigerator. Boeing Refrigeration on ships. This is the original. Only got meat. So that would be an export. It was the meat extract. Cool, please call me. They wanted the extra beef. What about Leo? So that's how you got this thing. 'cause once they got the refrigeration. I sent this to meet before that. Are you cold? Disney, you said that the Chinese meat came in barrels. Well, they will catch up. I remember I think they were hoping somebody like a Brian. The term other in those days I'm a lot of Dutch people in the portrayed and stuff, and I think I like the ones in Boulder mean. I'm not, you know. Too sure the background on some of that, but most of them eat their origins are uncertain of the whole thing, or you know it's really remarkable where. Iceland is a curmudgeon lands going for license. Every year they came from. Special time of the year. Sue you some killer? Yeah, that's right. What did they do? Particularly lower mainly poultry people and. I did a little bit of peace and little bit of hope, but mainly poultry. And when I went there it was to be a boy. In a new Department we offer Department, but just as I said the lowest. Hello something because you got show monkey at every job but your blood and all about that. What did you actually do with? Well, you really something to cut up. You took out his brains out of their heads and they got that done. Then cut the livers up into you. Know people would only want literally wouldn't want the liver and lungs so he separated himself the language that one person living to the other hearts to another. You know it was all. Does the butcher what he wanted and? He was not a better price. That was a virtually one reason why you did not come. So you you went in? I mean you went in to look around at the age of 9. Comma do not. You know, get out the way. Probably the school Holidays or something. And then when you were getting to work, that was what, 10 years later? Or something like that? When are the differences that had already? A bit of refrigeration. Underneath so remember there was never any covenant Sanford for showing the pieces of meat. To hold the line for the next night, Alamia makes me go down in Charlotte. But was anyone Brian exaggeration? You actually call it black

Brown refrigeration, do you no, no. Was that Brian was it went through in? What you going to do and? Talk about temperature down and a full guys quite readily and you had to make some guys came off every time again that so the you got enough cool air coming through. Refrigeration cooling. But there was. There was some huge Co stores which put the Brian out to the other little shop. Something on that and the Corporation run their own refrigeration. In some of the markets you had the sellers, which you could do that, but there was no refrigeration above. Ground level. Today there is like not like. I see so it was all underground and air cooled rear completely would at least keep purposes for the next day. Topical though the temperature. Tell it like wooden tunneling. So what sort of training did you have? You started as an awful boy? Presumably someone showed you what to do. Or did you know already from? People obviously things to do or tell me what to do. You know, if you got common sense issue, it was very easy for me, you know. A bit about meat. Undone. My love for your dealing with my liver, heart, kidneys. Things I like try. Select or something. And I worked under that. Sounds like my charm. What can I say now? He liked his entertainment and they used to be always at the West End with showgirls, something on that, and I used to go wake him up out of the in the car to come to work. Please, I'll let you be sleeping in the car and he got in his cell phone bill with the. So This is Money, but the fans doc and one day it was ill and. They are. I'm gonna tell you still customer gave it to. Filem on Friday. Social stuff again. Let's talk like getting on. the Friday team was nothing that was reading a book. So you know it was. Normally two people that you got together in those sort of things and then they put down stuff to each other and to put things right then and there, but he was obviously taking money with somebody and. He was all like Diana never came back. I love. Hello honey I'm looking for. Sounds because they thought it was a job available. Plenty of people came in and I said to the process. It will summon me. Sorry should I give you a month long. Taking Monster Islander, I improved on the other side and so on but father help me. You know butchers linger. Ladies and say come over. My brother went to work. After about two years. With me and. Is true. Get good back in. And we get more people wanted to do that. I was interested in the West and the drink or anything about right. You know that I didn't get me in the bad water with lemon. The only thing that up shut down the Apple card for me, but it won't break. Well, sticking to before the war, for the moment 'cause that is such a watershed, you said it was mostly poultry. Let's follow that through where did most of your stock come from? I can remember. I won't company a lot about things like the West Country. I think that was because the boss original original parts near my bosses, Carter came to that part of the world and had a reputation. It was a good phone. Favorite people? As I said before it, but it was on Commission and it was so easy to make it. A bad week. Good week. Well, if you were. Virtually dishonest. I think the Commission my size is 4%. Let's the charges. So you know you were you took your 4%. I learned the charges like which isn't tolls and pitching and things on that which are from outside the market delivering into the market. If you did that like you, I think elephant living but. It was very often if you know things have done badly and people would do. You know, not not, not not the growth figure down. Witcher? Hi, you know that come on the later you know you still got a better know Jim album. Hi, how do you mean or do you want to leave us till later? You coming back? Well, one of the things was that. You know? When I come back from the army right? So most of the poultry stock anyway is that that that the carcasses as well? If you had a few purposes, you said as well. So yes, we had basis. Huntington Beach 1000 and I never. This may not. You never seem suddenly made all day long. And the meat was down there. It was always beautiful baby. I need a friend of his come up like I don't have a drink and come back everything be sold. A lot of people worked on that system. Really had friends, they went another drink. They sold all their meat in the pub. That was my mother Maya. Things I did, but a lot of the old older type. I like what would be like my grand Father left company Labor. That way you pulled up and let that is why they traded. Look up. It's wonderful to hear about that. It sounds so extraordinary. Today it does. You say that and then. Um? You had the butchers coming up to the market. And the the ones that you know wanted to get them prisoners down and over would be up there. Only the ones which are bigger on the Big Boy stuff would be on that late and then later. Maybe it came. You knew full well the price about to go down and down and down because they've been the last chance, orderly and so. You got people walking in the market 5 minutes before the market shut because it used to have a Bell over which we. So under in those days you know the Corporation is to be pretty. Hold on the side, is it no more silly but you know people over that body not have tickets. Hello it. Fairly young titanosaurs when you got to say I passed one. He wasn't, so now I don't hear about it about refrigeration. When when did the Bell Gacha girl? 1:00 o'clock you have so much time to clean up two o'clock with the. The house on the market tonight from 5:00 o'clock to 2:00 o'clock yes. So you could write out your tickets from 1:00 o'clock to 12:00 o'clock. Stretched it along time. I don't know how. Breakfast lunch. But generally, yeah, you do stay there because you don't wanna miss anything. Just getting back to you, you don't. You're cutting up with awful, but did you know how to cut up the other things as well as your father taught you? You already. Not me, but I knew my logic. Put on I can I can cut meat. Today, far better than most of the people they have today will buy the proper. You know today. You can't meet you trying to miss the boat, but we didn't know. Today we we try to have aggressive selling wrestler, you know like and that way there was no wasted a bunch of because anything that lets the bone on the wrong side would leave a bit of meat with it, which are important. Today they don't. When it's zoomed, it's all done. A lot of machine today. Not interested in the Amazons, have you got anybody coming? Probably avatars into this. There will be yes or no. One or two people are really knowledgeable. When you want to thank you. So I'm interested that your father really just dealt with NZ Lamb, so it wasn't typical that you have that. If you were cutting like that, you would use just

you would just be put on to one particular yes. They come in all day, but was it very specialized that somebody would do the lambs and somebody else would you feel? We don't have beef company Neverland content. And late in the day. Lesbian years went by. I just sent it. Price. Tell me about the tools and the sharpness and all those sort of things. What did your father use Cleaver which is the same sort of thing that people in there and? That was way back. Blade. That come out the ground that was about 3 foot. And I can see that was for the budget cuts, but it is a chopper. So that will not work because he was quicker to shop. But if you were, you know that your precision was good. There was no need for a night. But on the beefy later tonight. What would you use this offer? I see. Rapunzel. And what cuts of meat were they producing that we don't see today? See the same counts today, but you know the the way it was produced was. In my way, in my belief is that was the best way because it gave everybody the meat in the right place today because of supermarket cutting and thinking about things uncut anywhere near as well as they were, but. No, but the tools is that the mom's name is. Sean delivers nice shot was there all day to shine in eyes and the choppers and they've done that today. You don't see those sort of people so people are using knives which are not as good choppers which are not as sharp as I said so you don't get a good job. Did you use grindstones for sharpening? They used to be little people up there with their horse and cart properly on the little guys down on the bank and they don't bring your things tools only come round and leave. They take some and then come back and take the others and when we leave our back. Hello yeah, thank you very much. Can I see quite a lot of things connected as revealed? Which are, you know? Those things were looked after by various things. Coffee houses. So what are the small trades? Are you thinking of them? Looks like when you say you're looking after them. Public trade you know which are with all rounds without Central app Salute Lee you could get anything done like. Hey, did you still coming from my car settling on it with the listing in the hand still on? Go to a place nearby which they would school them and shave their head off. Then they'll be people. It would be brining the tongues you know for some time, starting the brisket, something on it, all it in that area, and so you know we were accounted for for. Things like that, and then there being firm with John will pick up all the bits and pieces and nobody else wanted in there. You go off to one of the big sausage manufacturers or something like that, you know, but everything that was needed was in the area. Do you remember what your first wage packet was? Well. When I went to all the same, but that is my \$28.00 a week. Did you think that was a good wage? You want one or the other, but I did get my mother most of it and. We used to get a few tips, ended at expressing. I like doing the doing after sandwiches for somebody something. And so I really had a bit of money coming like that, so I think I gave my mother \$25 something around 20. And it was a large part of your window. It was a pretty to go and try it on top of the other website trying to work. And the United States. Sometimes it went by train or the old steam is used to come in. Then on time. Circle circle whenever you can. Come through the fog or anything like never, never miss. And what was your pay as an awful boy? I think 37 July members first on, but I was quickly put up. 2 pounds. So I'll be fine. I think that. However, there was also jobs are the people you know. They still mean obviously getting involved in labor. Offer me more money and also in that in that job you got six months and then got off of customers so. Quicken. But so you really had. Opportunity of a bit more money there. You are permitted to salesman. Then put on Commission. Tell me about that. I think it was like time I was £4.00 a week. Constellation 10% which I paid out every Tuesday between that was. You know to me was a fortunate version four times a week before the war was. Was quite old money, wasn't it? Plus plus plus whatever. When you come to sell then you don't get any tips on that. You just you know the tips with affordable Asian. Hello. Shut up probably in some days I. Would get. One or two pounds, a commissioner. Oh my goodness. Yes, it was quite good for Tommy. I think the ball came with that, you know, really at the time when the. I did a lot of damage to my in the way of. Work and I think I was gonna call the police, your boy. I don't get hurt or police. It was a woman is there and I had this. Think before the board later they were gonna call up 20 yards. It was first on conscription minus 20 and I got caught up. My boss said to me I'm gonna peel again. So because I've just been, this sounds like an all this business and all that and then field and I gotta postpone for six months but you didn't come about completely because the war broke out. We will find the day the ball broke out. Because you know, they knew you were going in the army and the instructions from the. Gotta love that everything will be done from a Depot. Which tempos open up all around London? Facelift on this problem? A Tiger. Picked up. Apart from a bit of poetry. And everybody went outside, and then that stayed in the sun Sept. I just waited there. In November for call up. I never knew that I knew that Smithfield was closed during the war. We got in anyway. I see the pollution. When I came back from the Army Depot is still there and they said to me, oh, you know you can join the documents I answered in the army for 70 years almost. Prisoner of War Four is no way I'm gonna have authority telling me want to be I'm gonna do so I went back to my Old Firm. I said to him. Have you got a job for me? We got is picking pigeons. Well, it's official in the world. Rosemary. My daughter. And. So yeah, I took that from then on again. Work to work tomorrow. Do we look that way out of that piece of money? That was really tough for you. Will be fully. I obviously want to come back to this, but I'd like to know a bit more about being a salesman before the war. Um? I mean, this meat came in and you're both bought it. So he or he did all the order written by. You build up. With a farmer. For wholesale butcher. You build up a relationship which. Trial. They firmed up this idea where we got so many. It's a little bit hard. Lunch and so much less. So much about tomorrow. Show me chick in somebody pigs. That's the sort of thing ever happened. And what's the market like? Let us know quickly in the morning, mostly. Prices like that's what we used to have a post office and we just sent them. Telegrams. One of the first job you like.

### Tom Hixon CD3

This is the 4th tape with Tom Hicks and. Right, you said we were talking about the demands, immigrants. Change the size. You got the allow people with general of God the Great deal of the product which are taken. About The thing is that we do so some people are allowed, but not that I'll meet. We don't song, but they shut it down. You know they don't understand. You know the Jewish people were there? For me to wake up it could use it, but just butchers come to the market to mix it. You know that I am a cheaper, making brightly Jewish slaughtered kosher. And you think that they sell it as personal? And so do the allow people. People go out there and make my best in places they got there to buy chicken and things like that, but. My own person. Is a part of the environment where the they lived in the early days because if you killed it on the 1st. And wouldn't keep a day about that in the heat, so you know that is the reason I don't eat pork in my view and same idea. In a kosher meat. But what we call kosher kill hindquarters. Is your phone. They only eat properly and so you know the same thing with the amount of people that they don't need. Lawyers in the topic, Slinger. No problem is really about culture is very similar. Rock stars and things are that we have periods where they could give them away, but now they're very very much in demand. We've been hit by all these very stupid government regulations we had with the bone in and all that business. If. They say you got it. So you know the Blood Brothers are on the body. Oldies regulations though. It's so stupid, it's unbelievable and they help people. Would you know if you got them private then they wouldn't selfishly and talk to them about it? They would have met, you know that. Let's say you're not. They have done things about way down there. You know about abattoirs? But involved. Long time with them. I mean, do you think that ever ties have been run in an unhealthy fashion? Anything I've been associated with that been absolutely wonderful. We got the. Elizabeth and the hygiene there is unbelievable because, you know, you got to be the. So he's going now. People were killing in their back in the shop. Something on that. Well, they hygiene could have been difficult, but the last. 20 years of hygiene. People have been on their backs all the time and we employ threats to stay in the factory in a virtually living. Unless you got public health people, would you employ? You play for in the factory. It's not my dad. Not with, you know, with their knowledge of it. You know there are one or two doggy make plans with you. You could tell. Get a baby. But you know, if it rains soon. I saw people like myself in. Cold. We we would. Years ago we did another. The preparation for the playoff people. We would examine the pigs and if they had things on TV which is very common in port years ago. We will put the pizza my side so they came and they looked it out mate. Sometimes they cut the head off and color and things of that love you. We could have the rest of all those sort of things but generally. I think we're very good. When you come to. You know, go to Europe and see what they get away with there. You know, they tell us what the regulations are. I get very upset not typing. Because, you know, I was in Italy. Was it 2 years ago and I couldn't believe it and I saw. Stop being sold in an open store without any coverage whatsoever in Naples and. OK, but Labour be telling us what we should do with you, annoys me. And then in France I was in Paris. I'm sitting down at outside cafe. And it was on a Market Street opposite Lee. And I saw the pigeons. Only. Bruce. Message. Down onto the chicken with somebody hanging down below them, yeah. You know they're in a position where somebody could do something about it. And you know that's right when you get those regulations which don't do as I do do as I tell you today, you know and all that. Did you actually feel about BSE then? Let me do you agree that it can be passed into female? Got mixed feelings about their say I feel. Set time. The original problem doesn't always have feed. Now my belief is. Some of the fertilizer should have been put on the ground because there's some of the more but First World War gas. Virtual use discussed in the first level to me. If you get a build up of that, it would cause as much damage in the space station. How is it that you got vegetarians got BSE? Oh God, this is two or three cases of vegetarians having mercy. Oh yeah. Quit. You know, and I think. Vegetarian. But, um, you know. My I do know. Southern island but it was quite a lot of repairs for May shun they had none. They did what they heard. Switcher had it in the early days, same as we did with the when we had foot mouth and those sort of things. Gemma said it. And I believe the longer this. Could pick up from. When the Eastern Europe opened up. Fingers pulled in. Come on. Longest and This is why I believe it. That could be as much of a problem because the Germans certainly had lots of meat. I didn't wanna see my market. Economics came into it. We should have. Oh God, yes. The world we live in very hard because we. And they wanted it. They still want it. Completely lifted. The great tragedy, but you feel that. I mean, I believe there are a lot of abattoirs. For instance, it's really not as hygiene conscious as yourself. So we got to get to export to Europe. Absolutely. It talks about weed. We could, you know, the. Situation where we could have done my American count we've met. You know, we could have exported, but it wasn't economical. Come with me. My son still lives so much. Watch out big dumb boy alone people. Olivia symbolism comma marketing vision. It was very bad. Cool level Video. Something that I feel sorry for the farmers they know they used to have a wonderful living in there, but they suffered the last five years. And not there for the money. Talking about exports, you export a lot too. Europe. How much is the meat good meat? Normally, some carcass meat went over there, but of late it was in primal cuts affecting packed in boxes today. I had a phone call today to tell me that the Dutch people which we used to send to over in Ireland looking for meat Now. I am I got friends in Holland and I don't have that kind of dinner and I always like to see the supermarkets and I used to see there are meat which we have branded. It's called Greenfield, in their shops, since they haven't had it November absolute rubbish there, so I think the ducks are very eager to get back into quality meat again. Could I heard is virtually cows their account and not be sold like we are? And

why is America more difficult than what they have? Let's go on to the other problems that we had with disease in humans. Are the EE coli, listeria, salmonella? But what do you think that meat is been responsible for those? Or is it handling the retail and or what normally human? This is the problem. Remember back to home base there many years ago, but it turned out to be a person working in the grasslands somewhere. I went there for the machine and he had. I don't think it was. Just a few years. Salmonella. Salmonella. The look. Food, food. You know when I said it can't be causing it? Believe it. This is absolutely the highest temperature possible. So I could believe that, but this question of. This chaplain, Scott, the recently that had the year Ecolo down. Is Hamburger handling problem again and? Thank you. People like that that things are left in my belief. The water isn't causing the problem. You add water to things like saving. When we was an animal down it doesn't keep as long as that. Didn't get mostly used to want them now. Take all the blood. Now they're banned. Now you gotta. Boston was the most and that water gets into things like under the diaphragm diaphragm. With that because they use their hoses and there is a thing that goes through. I believe that water is done more harm. To the radio. I do not know you. That's very interesting. Why would what would it be the water or make can't be the quality of the water? No no, no. Small liquid. Get anything. Leave it overnight overnight. That could be picked. For the next week though. The fact that I believe that water does more damage than anything we used to have in under. Very great deal. And he was the top expert in my view in. Hygiene in late tonight and we had all this. Either somebody's coming up there coming over but it used to be. The football doesn't. It used to be. Themselves, of course, is a big word, condemned. Every week because of this. Open my pictures. And we went there to the first week. Glad he saw and they were washing down these animals with these power poses. Any good all this time? Under took off with Nozzle and told him that that was their problem. The multiple so hard going into the meeting was going into the diaphragm and piston fire took a week to get here from yourself. Under we lost all that meat, but eventually he got him a new nose or where the power wasn't so strong. I did the work. A little bit longer to do properly. You know all these ideas? Coming in above the problems I still believe. Cheap meters. To hang it under remember doesn't Easter years ago when they didn't have the water on it. So that was my opinion. So if I. Looks lit. Knicks today, how would I see if it's different from before the war? The fact will be the main thing is that you see that the breeding of animals today is towards the continent dog breeds which give you very big lean meat. Don't log in. My view is private, then there is. You know, sorry not flavoring. That is not as good as it used to be, but. I like to go into the what we call the beef breeds Wycherley, Aberdeen Angus and here it is. Things are not done. If you go into these milk. You know you don't get it. I am personally. Trouble Aberdeen? Anything that I can cut the fat off, but it gives you the flavor. Right and what about the actual cutting the meat? The supermarket cutting is atrocious. Really don't cut me. Probably at all with anybody really wants to have a meat cut, right? You gotta go to a local little budget and get him to. You need to tell him what you want for him to advise. You want to you're looking for. It's some time is different in the. Different accounts like they seem a lot of cuts these days work to take the muscles out. Individual muscles which comes out in the Bush is mainly done so things have changed drastically barely. Well, years ago when you don't buy Aruba beef. Today you have do that what they call a rib eye. The piece which goes on to the flame and among which gives in a flame you know you know, so long as the changes you don't. People like. They buy the flanks because it is a flavor to make Burger. I remember when I was involved with them, but Donald that. I think 45% of their order was Frank leave because it gave a frame. So this this old football. Yeah, that's very interesting. I was available to Spanish. The statement to McDonald's for about a year. We had a fabulous pair and they came over and they acquired from us for bread. But the. William. I got onto. I got very friendly with the American people and I took him all over Ireland and the length of this factory for years. While they built their own. Thank you. And I got invited over Philadelphia, install their places aperture. How are they different from what we know? My space is bigger. Much bigger. Remote control. No way, no problem. I know the controls are but absolutely. Close, close. And the first was he gives \$12.00, yeah. Send messages or even farmers when they went to pharmacy. Same people. How do you do? I mean you you supply all over. Demands are different, yes. Mainly because of if you go back again into the history of areas and link Donuts. east London needs to eat more phone call to meet, but it was cheaper and east London in my early days, maybe not today, but you know all about Mile End of things are that we used to sell the cheapest cuts of meat. And I can remember years ago when I served a butcher who lived in this area and he had lots of many shops in east London and used to look at the man's orders and it is ordered and say what is showing signs that he would turn around and say they've given so many accounts. He wants out of that, you know, because there was a type of butcher and they did. He would never send us so lump sum things on that down there. Thank you. Have a good labor, too expensive. But he said the man of Father's taking that a good picture. Later. In those days and could see you out there. Some of the South East of London too as I was on on the cheaper cuts, but generally the the better cars went to the West End areas and restaurants. There were some. Very high class. Wonderful butches in 20 years ago. I don't exist, many of them today. Unfortunately. Imagetrend the takeover of restaurants, in which is mainly owned by. People these days isn't. It is similar to the business of being created it between us and them for supplying them like most Italian is our Best Buy offer Italian supplier here for catering supplier. Having the same as some of the other the joint is they've got their own market up in my field and they come up and they they buy their spare ribs and things like that that don't come down. Chicken. Pork. Is my food and they bring the vehicles from Billingsgate and from Leah. Festival markets only virtually do it all on the paper that outsiders. OK then I sold on their budget. Transfer from one bank to another. You know different people

working for that. Another thing that's happened is liberalism Chinese model. Well, that's that's got through this. Within the last 10 years. Johnny. Before that, but now gradually they go into a. The numbers of \*\*\*\*\* have decreased, but you know there's gonna take over by. The different groups where they threw 20 restaurants in the cells of certain monsters. Will be used together. All those people up on their own. They don't come up with their supply binding on people. Um? What about any watch is changed? Looking at it from the house fires POV. Where is your joint on Sunday? Now we have. We made less meat altogether, but we go out a lot more. We go to these restaurants that you're talking about you supplying with friends, and so on, and we're very likely to eat meat when you go outside. But are you cutting the meat differently? I mean, cutting out the carcasses differently in order to supply. Different sorts of meals. I would say that. Most companies that start in the cage and trade decide they're gonna their menus, what they're gonna be. Maybe for one year 10 years sort of thing and they get involved in that. Not only but very little people get involved in that expensive cuts of meat. But if you been in the restaurant right in Hadley saying of RAM. Is very popular. Breaking today but it's a big deal and let your love of the pop server. Let's just say it just is better. Um? You know you got the public house trade, which is very popular. Understand kidney pie and that type of thing where the kidneys disappeared these days. Later. Don't like kidneys? Things up. The right size since. People don't. But the. You know, I if I get it, I just don't understand kidney pie, but generally there's not a little kid. Um? Pretty good, it gave a lot of flavor to the puddings and pies. So what happens to those kidneys now? Do they go to? But it would go into password problem probability. Supplies I buy. One of every kind of the animal, with the cheap enough. Impactful is mainly blood. Is it the black dog? Drive glancy. How do you? How do they organize that? Would be important, but other or. Doctors all over the country where they take the blood and they take out the enzymes and things like that which is valuable to them and what's left is that like a powder. Everything that goes into. Sometimes into things like black puddings. Aura. Into animal feed. Play Liam Patrick. And So what about other ways to choose now? I mean, we don't have a soap anymore, do we? You run one time a day. We used to call it the fifth quarter, not used to produce enough money. Virtually took pay for the killing of an animal. So now. There's nothing else coming off the first quarter because you have to actually pay to have them. Things taken away when people would buy them off you. Now you have to pay for them, and unfortunately now fully. The skins, which is used to go my little Russian. Little einsteins. Because the financial situation will not going there. So Pelter blambot Schuster. Probably bring some write downs is now. Probably was about £1.50. You know there's a lot of problems been developed with the Russian economy. So bad. Under also like they bought a lot of leather for boots. At the moment or not? The highs are not bringing the money. There were one time I hide recently 30 pounds. Lucky. Could help me? Is drastically not all because of a late trade. What are the projects would you get me? What about the boat? Bundle that would be awesome. You know my days into the gardening section. Um? The blood work done with the glands. What happens today? People like, um, boots. All those sort of things that will come out of it. Pictures on the order. Leo please close all the awful lot of them. Things to video. Different tales people years ago. A particular reason. In the brain. And out for experiments. Very delicate operation, but today then I'm done talking. You know the things on their heads had to be thrown away. Things like tongues are still about, but one time a day you could sell. It knocks down I think I love it but you're beginning to come back. It always says things happen because of the. Problem with BSM let you know, wait developed everybody so everything was terrible and I never. They won't listen. We were just testing now about government intervention in the meat trade. What's your opinion? Today I find that. There are the great deal of people that were there any knowledge at all of the basic problems of the betrayed or. The things that was needed in the Metroid we years ago, we always had people which are secretaries warrant wonder in the market and they would talk to you. They knew a bit about the Metro didn't know it all, but they will always say up to ask questions. We could ask questions and then and today you never see anybody from the meeting time 'cause there's and I believe are the problem comes from the fact that one time a day they used to recruit from the trade. Now they don't. Please come in and purely Facebook knowledge rather than any basic knowledge of the trade. That is my opinion. So I don't think it was good for anybody. People don't have basic knowledge. How many for anything there in Bolton? We have just met them at home, you know, really didn't know anything about under in charge. Obviously problem if we'd have had somebody there. But Lord Vestian, somebody about that involve the money got somewhere, although he wouldn't have the absolute basic not he did have a lot of knowledge and teachers and. I can't really. Give them any credit at all the industry. I think they've done an awful job and let down everybody in our business. And when they came to you, no wonder you look at their losses. And when they came to. Give people allowances for the losses and that the wholesale trading carried the brunt because they had the stocks. Included at all. Under the plan. Farmers got a bit, but you know, we really carried the brunt of the losses. Of all stocks. Done. I think it's one of those subjects that you could go on about them to probably go upset. A lot of people we. We had a very good working arrangement. But like Chinese, that departments online, everything's Chinese is not the same. We can almost roll them up and ask him a question. Today tell me about the sort of way that meat is labeled until gannex in farm, fresh and slow. Different things, I'm not sure what they mean and what World Farm forces are. For similar. And as regards. You organics when I'm always a little bit suspicious of them because of the fact that. I feel that there's no way they can produce the animals. Without some help from the. Chemicals or some sort of the other? You know, when do you? Two years ago I can remember coming into the market and I saw myself. I got it, could you so wonderful. Now with the big buttocks? I mean, have you heard of Angel Dust? They were put in Angel

downstairs. One of these things that they were feeding cattle to produce, be clean and the muscles dot. It's a very deadly thing. I don't know if anybody here and hold it will kill him. And farmers I know in Ireland this summer farmers and got killed by anybody but originate it from something. But labor? Was a former drug of which I didn't know what it done. Understand it, but I can't remember at the moment, but it wasn't a full but hormones were used. I'm administrating wanted. Just animals cooking now. This must not be hard for the supermarket. They wanted the younger baby on the beach. The old traditional ways of producing an hour or two and a half to three years old, but still went by the board. They wanted it 16 months, 18 months, and so all these things got pulled into it and. It might be helpful. So. There's not many supermarkets or leave it at everything but. Regards quality. You got a letter. Eat the right things and not forcing chemicals. Do you sometimes think the same way? I hope so. Late late late hear me explain about it often enough to know that I think that. They might consider some things, but you know it's because I've been at it so long ago. I've seen it as well. Along the same piece. Very good, too big too. Let's compare the technology that you use now compared to what you had. What you describe to me it's this field before the war world, when we. We had the market. Wonderful friends, elated. Victorians I knew all about airflow and all that business under we come into the early days of refrigeration where we had our things on ice boxes and. Brian Plants and things like that where there was always a problem and. You know you always looking at the refrigeration. Today we got the machinery which virtually you don't have to look at. You know you got an engineer comes around every three months or whatever as a local. Fills it up with gas is whatever you need, but that's the end of it. But in the early days it was very difficult, but regulation you couldn't virtually Willard it understand. And. There was always a great deal of work to get it working reasonably well. With the binder you got the ice forming on the. Cylinders. You have to defrost every now and again and. Cause if you defrost it with lots of made any other devices under the meat as well so you have to. It'll be very careful my shoulder situation, but we figured today is wonderful really, although I'm not in agreement with the amount of refrigeration may insist on it for traveling it, because I would like to see the meat arriving much more naturally colored. Fun fact, you know it's not been over refrigerated to tell you if you should sit me down from an abattoir. You've gotta have it down to about 3 degrees or something like that which is not easy. To cover overnight sort of refrigeration. To get it down as low as well. So I'm sorry I don't understand that you have to get it down to. They hiding people will tell you. Refrigerated. Refrigeration temperature switches. We got. Open Cortana, refrigeration. Refrigeration. The glass cold air into the. The motor vehicles and things I like. There's all different ways of thinking. I get it later, temperature down now, but. Refrigeration is is very good. I got nothing to send out. Logging through Federation accepted. It helps our business around it. Couldn't tell you said that you felt it was refrigerated. Refrigerated too much. The refrigeration itself against the product entered work, so you know I don't believe in. Refrigerating them eat so much as they do, but the actual plans are unbelievably good. What is the effect on the meat if it's refrigerated too much? Well, I believe it doesn't help with the. Need to be tender. I always remember musical amateur ticket when we had a better days in alignment. I don't think so that it used to be lovely and tender today, easier than land. In my view, is tougher than it used to be, and the main reason for that is Lee. Quick freezing of the animal. The animal doesn't get rigor mortis, doesn't settle in, and the animal, in my view is refrigerated too quick. I don't know. Yes it does. It does make sense, I'm I'm very interested in it so you know it has that effect on me on the end. Technology I mean obviously. Is the main one, but what are the technology? What is it? If I keep talking, which is very good this gas packet? I guess I've got two people make friends. Repeat every time. I'm done. I don't think it is used as much as it was, but the salesperson Marks and Spencers and people are not used to have this gas pain. I see more Baker Gaslight than anything else these days, and it does look a bit bigger shelf life. But the packaging itself is to go under. Dark inside. But the vacuum pack it isn't very good. Second, it's excellent to, but it wasn't really that type of paper used and. 2 silver later cited. It's just also different. So who is your main competitors? The market. Names. You know, you know, virtually in the meat trader we. Have several people long often hold. Temperature. I don't believe we have any competition. Ignore the quality about midway or where we've been very, very carefully. Don't waste. There we go. Which is my own plant which produces the best meat I believe in. Island. We also deal with another company called Murder in the South, which we don't wait for years and we believe is the best meat from the South of Ireland. We deal with several people in Scotland. But if I ever. You're trying to kill us. Good job. What it what is not really, you know, they say this is the best beef and I said no. Trouble? We we stipulate what we want, we pay the price but don't want you don't want the last penny off these people and we don't expect to get any meat. Does not the top quality. And that's the way we worked over the years and not my somebody. We don't have business. People would leave you with orders and not see them eat one time a day. The average person would go round everything. I want to look at everything. Today cinebox give him the quality once. So you know that is only done through years of. Work. With people and let you know that you won't want anything that's not good and you pay the price. We gotta get the bus. Put your trust in them and. In a we trust the people we deal with. Play trust us. Would you get anybody news starting out? Possibly everybody would want to. Sometimes people. Awesome yeah, I just insisted that pure quick. If anybody started the business out, there would be somebody in the trade. I don't think anybody from outside but want to get into that. It's a trade, but you gotta go from the bottom up. And the most successful ones today, I've done that. See one time a day. 70% of the self thrown by big companies like Swift. Almost the best people. Find the password. Love you hard last night. But they will be public companies. Swift and Armour. So the merican companies. Not one. Well, I don't because I couldn't.

Convert. Is important. Security light. But we used to having meet certain Commission all the time so they never had a problem of buying the meat. Put the money up for example, everything was the other way round. They got the meat they pay with a friend said it they paid the price they plans. When it came through. Making a profit on it. Like really you went by the wayside very quickly. American firms 1st and then there. Testing people are different. Every shop on the market now is owned by an individual. They have a company, but the person who built the world and things online. But unless you got the knowledge. Don't level. How do you feel about the diversification in Smithfield? Is not the only market? It doesn't worry me. Competence don't worry. Long as we can do the job right, I think we'll have 30 other business. I'm done. Outside people. I don't think they got the same problems as we are and. They're not doing a better job right now. Most of the people that you look at today do while developping and improving their business. I'm getting more business on the kitchen table. Accomplish nothing. I know they have a lot of meeting direct. 2. Get the feel of the market. Get the topping up which I require. So they when you say direct, they will be dealing with New Zealand. This is very busy, but often the people in Scotland or Ireland would serve them direct. Then they will come to Smithfield. The average catering butcher would want a lot more of the skip lines. Person. You know so. They have to buy a certain amount. I like cats, which I'm not so popular. If they gotta get all the Phillipson strip mines and once they want so they know full well that will bring them in. For my story, leavened wherever and they come up with those as well. Because you know, they got enough for listening. She only steak houses Legoland there only taking a very small problem made out and he got the rest of the animal to deal with. Yes, that that is a program. Give me that. She need without without the waste. The secret you know, we're I'm a dragon turn the Islander layout my old company probably out there and the one thing I've impressed upon them is to get into more into the animal rather than getting super Mount. Are they getting involved in Kuwait? Some things on that. Which are you gotta get them maximizing profit outreach animal? Otherwise you know the old method of hit them over the head and. Superman quickly is gone. We really gotta get his magic. So you know you by the vacuum packing and things like that. You gotta carry a bit of stock. You gotta take a gamble. But now the market will go and. Get involved in other things like. Their business sound today. The link says this is fantastic. One summer day, nobody will don't want to buy medicine. When I was driving down today. Well, it is what we call the course. It goes to the. So in a bag. Only put it through again. It was smaller than that. So you know. Wholesome. Start this up. And. What? The color. But it's radio control there. I put in there. Try outside. It comes up fresh as a Daisy. Longer you leave, it is only the refrigeration. Fascinating. Tell me about your connection with the meat supply livestock Commission. The thing that comes to mind under people. The Mount of people that are involved in the early days of the date that people are taking out the meat trade. Bring control but. As the years go by. I had a colleague on my board spellers. Which, um. He was only. And he came to me one day, said Tom. How quickly can I learn something about the meat trade? And I said tomorrow I'll be there if I send you as I've loved everything he said, I must have a little grounded. Hello I took him around for a day. The next thing I knew he was chairman of the price doctor myself. Sarah, you know? It's not what you know, so you know. And. You know I joined this company, but he had no knowledge of meat, but he was now the Chairman and I think he was careful from here. Something like that. You know what? You're amazing. He's not any longer. Going to greater Heights, but. He was a man with John was in charge of the mainline stuff. Could believe it when he was provided. But that's life. Are there any other organisations that you have anything to do with? Find my item quite a bit today. I've always been able to talk to them. I know full well I did sit there and do it, slow train and everything and I know that if I say something I giving right lately. But I would believe it they might not accept it but they listen to me and I found it very decent. To talk to. But generally the meat trader. The organization isn't over, mainly for. Enjoy yourself something which I've never been involved at. The Butchers Hall and all that design element. I started to if I had time, but Windows spending with my family I didn't know. I didn't know. Are there any organisations in the Matrix? Was working in the family. I'm interested in comparison with the American way of doing things and then excited here. Well, the main thing is the. The numbers. You know where we want to be able to save thousand couple of weeks later during the day at one point, and I can remember particularly going to. Make plant in Texas. We flew down in a little playing and. Went into this account and it was run by a fellow that originally came from Lancaster, England and he was very proud for the numbers. He could kill and I went into his plans and saw him. Producing darling and I was horrified at the fact that they were chopping out. The kidneys which summit is sorry. I don't know if you have kidney and. I said what are you doing that for? Is there whatever else I want to do so I took him into the wheat plant? In the week long player, but they had what they call. Half Indian, half Mexican and all these people and every other person operated. It was a woman and then fantastic weather knives and I I showed him that is when the animal was killed. You could run your hand up in the glove inside the kidney. He would release I kidney. And. Don't have to jump it out, he just come out automatically so that even if only openly told me how many dollars a day at the same, and that was very typical of America. With greater numbers, grading quality but lacking finesse, and we can always sell them on the two things which it would save them money. I did get involved in a business in America called. Coffee in Denver, Co and. We found the competition. It was far too hard and so many people, especially the people. And it was very hard for me to show that today. I don't think he made a wonderful government. I sound like to most countries he went into this messy like American France. It is hard to complete. Song. Because of the. The problem is with the people that they will cooks in in business is unbelievable. Office in Paris Market and. Never made any money until you know they didn't lose a

lot of money, but I went in there one day and I said to them it's always fine never casing around to the ceiling. Yes, for the tax rate also, but you don't please please. You know my deposit. So they said no. After the title, but that was the attitude you know, there was always somebody there to buy off and the customs people. We had awful trouble. The customs we had this vehicle that went in one day and it come from a cold store public cost on its head. A lot of beef. Case in the B fitness and on the back when they opened it up. There was one case of pork. To the accused also. OK. And. They arrested the driver. I'll send a director over to sort this thing out. They rested him. Play sound of 30,000 pounds. Um we we're told that by the judgment, when it came out, that we can have money back to the site we never gonna have money back. And when the. Customs. Awesome boy, so I gotta follow to follow up Monday. For the customers took 6 levels of early vehicle, so at the end of the day, like more lands and we had to sell. France is full of drama. We got out of phones and. On this, but the only place they've been really successful with because you know they. Very good at protecting everything's out there. They weren't very good at marketing, but they've improved. We were often there. We did well because we were good marketing people. Alexa now. Play different sounds. Well, stop it. Afraid of those loans down. Friend of mine up to me one day and asked me if I was interested in Botswana meat. I seen this meat dumped onto Smithfield. A few years before, and it was. It was dumped into shops and long Commission and. I looked at this late and this just suddenly I can get this. I just say if you want it. You gotta be apartment, so I went to see George Lansdowne and told him all about it. He said yes. Yes, yes. Not a week later, the full account that you said I heard from you. It certainly is a Friday cell phone. But again, the main term activation I have heard so I went to see Jordans on sale so George don't make much about about to tell me if you're interested or not. I will see him instead. Sorry I got the job going to see him or within 24 hours. It was all but you know it was such a wonderful deal. Under, the idea was to. Juice. Base differently and we took over. A very limited amount of time. The contract because the chapter. Who was a South African? What's new. He wasn't allowed to be there. So the first thing we did. The cobblestone. Is to come off the previous right onto the market. Was found out there was three different commissions taken. Promise me before. So we put into Costco and we started to regulate the sounds like we also applied the bus driver wisdom people from packaging. Is there another packet better than they were? And within two months. We might get a very desirable way down there. We made so much more money returns today, but we got the job. But then on and we run it for 12 years and. I was almost to interview one or two people one day for. The box longer, which I did have fun dying. Good job, I recommended to take the job down in Botswana. The. Steam download it did a very good job in Denmark as well as both Father and I got very friendly with him and he said to me one day could I train some of their stuff. We had 12 people come over and we put him to join them and the next thing you know they wanted to do it themselves which you know with progression. As far as I was concerned only two people said. Play your Madden all this business but we had a good business relationship. So run. You know that that happens, but we run it control V as we did a good job and we're very pleased. I was invited down to the state banquet. So let's see comma and. Well, we got. Call ride without riders. To be able, you know, real. State business. When they had their ten years of independence. But they're good friends today. They don't know I'm going to do the good job, but we put them on the road. And I really. Develop learning, hope help to develop my own company. So that was one of the things we did very well. But we've done it for several people have done. I don't know folk music too, but in the course of mine. Places are apart from building up companies. For people I've been taking over money too. Great photo. Under dinner finished up. Limited. Better later. Are you? So you can do a job and. Sometimes people get out of business. I believe. We've done it all. We don't. I'm so sorry I'm not a millionaire. When they got it, but we gotta get my family got more important children. So that's it. Thank you very much, Tom.

### **Fred Mallion**

This is the third cd with Fred Mallion

Tell me about your involvement with the Association meeting specters. Well, I guess it started. The third take, with spread millions tell me about your involvement with the Association meeting inspectors. Well, I guess it started when back in the mid late 60s. Government. Decided that there should be a specialist meat inspector. Stink for me. Previous thing which is being inspectors of meat and other foods. And the new course was instituted on the browser side itself. Which we ran at Smith College. I'm not closing those early days, but probably early years. And. College. Probably. Plains all then meeting specters. Coming from. With the country. Really. Yes. I'm. I know I was invited to join him. Association Meeting sex Association counts. With you Dave. The. Representative. Later. I was invited to come president. Except you fool. So nice. 12 years. The end of that time. Government were talking about earlier. National Beef later inspection service. And I did many. Allegations are starting right with it to ministering this transition food. Talking about this setting up. Formation of the departing service. Very interesting times. Many traumas on Wednesday. Well, many of the make inspectors in selves didn't follow. Lesser services at all. They prefer to keep it as it were. No reason. No real evidence is saying this, but I was suspected because they were doing very nicely as they were going to change the situation. Mini. Of those council meetings, which sometimes goes, it's stormy, to say the least, but eventually service was. Problems largely. BSE really cold. Set up with whatever supposed to be doing. VSC problem rather than. Inspection. What they were doing before the VSC? What would you expect me to expect

it to do? Wholesome. To the customer. But I did this by general observations because it looked right. And then with incision all there is. Which disease and or conditions? Bruising. That particular portion, rather than the whole carcass. Macy ated. Then that would be condemned outright. So it was really getting clean, wholesome. Late to the consumer. Another great many albums now as to whether that particular system. Which is been in bed since 1922. My memory serves me correctly. And. Is in fact correct? Because most of the disease is mainly tuberculosis. No ascendancy. And. Then in the other diseases such as. Humans. Now extinct. But what has come up come become more prominent? Although there uses bank currently or at least see regulations. But this woman's. Couple and promote growth promoters. You probably will be longer than going on line with the states. Expands here, but. Some assuming news. The model was applied so simple test. Determine whether or not he is. Whatever it is. Is it? Is there a simple test? Not so far as we know. So you think I needs to be advised if we get this? Tell me about BSE in effect. Well, this was. Great Clement. Devastated, maybe this is probably under way. And in better specs. Cancel, particularly all samples. And therefore should not be fed on carnivorous carnivorous ooze, and that's what happened. And it's that time that this was happening. The. Celebration temperatures. For. Waste products from animals was unfortunately lower. Everyone, government, etc. And the renders themselves, so this is. The right thing to do. But it turned out it wasn't. And disease notice lately, which has been this year centuries, which is never cause any problems as far as is known. To humans. List. Not so she rendered and give himself capeless lady in their feet. And it. Causes be assigned busy crisis. I think it is that maybe this was all wrong anyway. And the trouble with. Scientists in general. Is that the same evidence? But he said that. The crisis did occur. And governments. Many peoples views overreacted. Particularly when. This new variant of CJD. Experience. The farming industry particularly. Devastated by this. Leaving the state itself. Has survived. And. But it's hard to put its house very much in order. And it is said there's never a bad sign. Fleeting with anything that happens and this may be the case of BSE happened. It made the industry look very closely. And take all precautions. And those have been taken both by government regulation etc and the image itself. As resulted in British meat. You must be by far the safest in the world. Any dance without any question. Can you say that? Who's phone is the summation Spectre scared? Change network. Well, up to this point, it really hasn't other than the ultra careful in. Networking procedures other people see that. This is Williams. Materials. It should not get into the food chain. Do not get into the food chain. Play. Techniques etc. Entirely separated. So there's no cross contamination with anything that is going into the meat services that are going into the human food. Interested to the awful reject died. There is still ongoing discussion, in fact. Sociation meeting council meeting. When is surfing was discussed about? What changes may come about in inspection procedures. Roll inspection, I think the right term is meat hygiene. Contamination. And things. Contamination from other sources, right? Um, what about the situation now? Fees are the inspectors and vets and you have so many more vets in the slaughterhouse. For instance, more don't you? Then there was a case previously. Easy regulations. The. It must be event me, officer. Is the OK for the stamp? Do it, but it's under his control. Meeting sector. The donkey work. Pulses. This is all in the name of. Officer under the is easy regulations. The better contention between them is that. Let me officers charge. High rate. 'cause that's the cost. Mother of the. Latest thing is apparently sufficient. Ingrid? And so people have been brought in from the continent, notably Spain. And this is causing quite a bit of upset within the industry and the inspection service because many of these becomes be better with English speaking. The most something straight out of any college feeling isn't there. Experience caitians do the job as it should be done. Quiet. Come now, when actually will you, president of the Sociation. Kane most of the coaches company. September 92 earlier the. Search president. Which are great. Thinking. Do too, is it mostly turning 12? When it became apparent that I may become the master butcher. Set to the. Cancel. So. This is not going to happen and I didn't feel. To central station. Well. Really exercising you. Inspection service. Getting out of the way. I'll give it. Nothing comes to mind. Well, I'm sure. Yes, you know that was a little trouble. No setting. Because. Generally. Serious, serious enough in the first place. Not my industry, not by. Inspection service on my gums. Katy Perry most views. Handling the crisis. When it became apparent. It was a problem. It is filled with the feeding. Started the business. Seating. Started this. The regulations have become put in place alright and would have solved the problem. This thing can't take it far enough insofar as. They should be called all feeding material was out for the phones. And so it's still being offensive. On site and still being fed to the animals. When any signs. Associated BSE I think Apple was was notice. Then the company sold so they got spread all over the country. Bigger problem. Mark could it be contained? Anything with salt. Stop recording. Causing the problem. Production. Go back tomorrow. Did did you is you know, number one of the Association of meat inspectors. Did you say anything to do talks with government marketplace at this time? Used to make later face meetings. Lot of people. Peoples but. Because this thing. Everything was not that very closely. Regulations or whatever put in place. So to make bridge me the best. The best. Good good. Running so when did you join the washer company butchers? OK. Freeman 60 living room silver 62. What what? Why did you choose to join in the first place? Well, I'm coming. You know and. Becoming somewhat established. And. And I think many. Function. Something. I would like to be associated with. Night vision clonus and. Accepted. Internet. She is in it. Yes, that is on the useful parts. Of course you need. People from. Not really, but mainly the meat industry. And even. Talk about any subject one wants and even pick out all sorts of. Useful information about industry. Wait friends are going. Albion ceases its way forward. So it's useful. From that view. I left office at the college. So you went to get it. If you want some information. The later was. Corrupted to the education they take. Four years. Before the court. Then

did in the year 7 was made chairman. Every time until. He is often. Oceanside. The sense that. Then chairman media. Baby song last night. Always very helpful. My whole career. Everybody's Cup of tea. It was really great. Even. Lego. The process is. 17 David Tennant. From box here in this hospital bed. College. Take that off. So that was my first introduction to young people. And. Become dependent. It had to be done very quickly. Tell me more about the work education. Side of things. Range. Malta number so ships education. Which all tenable in the UK, Europe, particularly Germany, and in some cases of just mentioning camera. So what would those scholarships do? Would they go to all aspects? I mean could it be an industrial company or a? Yes, also trading. Scott exciting company. At least that's how it was. You know, I was early days. That still continues, but it changed a little insofar as we will support people on a course. Out of interest. Yes. Mr Conner, particularly hard connections in both Germany and Canada. The big company. But what sort of a company? What does that do? They can do that production again, sorta. They can production and manufactured products. But in in German because German festival. We had about. 12 monsters losses. Shops. Beam size companies which accept it out trainees, or anything six months after year. And. We look for young people, not necessarily the brightest academically speaking, or even in the professional sense, but who. You know your reasoning with bushes. Sounds even better. Continental. Sushi. And. They make application to ask, it would be interviewed. Not accept. Then getting sent off to whatever area they wanted to be, it is manufacturing. This could be done in countries as well. No, the better ones. Every couple months about what they were doing. And when they came back, we expect it until we get the final report. And we also ask their master, but they thought of them, which is equally important. And better ones, should I send wish? Is that gonna take out his place in Burlington, Canada? Refer to here. There is much. Young meat but they would in effect run a Department instruction, of course. Neither. Departments in Canada. So they would like behind supervision and management. Come back here. I wanna sex with you know 'cause not only that. Many places. And the nice thing is, too many of 'em, all members of the company. Either of the young and right. For. Full ranking listen. He says it will be lost as well. I'm sure they will. So if if these young man wanted a scholarship, would you advertise them or would you fix them out and they come? Yes. Ground. One thing so no. Regular. The colleges training centers know about. Disappears from time to time. Yeah newsletter which was sent out with. Then this. Meeting council there. Circulation. So it's still around. I mentioned earlier that. We will support. Keep on courses. And we have supported people on master science courses. And. 2. Associated meetings to classify it loosely. There was a young man who was at the college on the day release course and Audrey Young. I'm so in suite with the. Anatomy Physiology, meeting spec shun medical diseases. That he decided he would be a forensic scientist. Believe it or not. They had no other levels. And it works. Levels. He and I I'm late arrivals. When's the University College Hospital? Talk to chip. And. Then under the covers is time to this determines countless forensic scientist. Open. He had to go to America.. And we applied loss of funds. Now. As a son, I knew the young man, but I didn't know what had gone between times until he applied. And what we did was. Guys any? Who's gonna cost £1500? So we gave him 500 pounds, loaned him. 1000 which they had to reply. Within four years of qualifying. Which is what he did. I think I'm writing to say if he had in the paper, we would be worried over the March one day not so long back. Degrees in here. Please check. You know it. It's so marvelous. We started out as it only can be done. If you want to do these things badly enough. You might be interested. Yes, another. No, this is my PC is that the son of a picture? I got into the video college wanted to be event. And Father could not cover his face, so he applied to us for funds and gave me until he was interviewed. You decide to get. In the sound of it. Then we run with him. You already done a course, then like college. Glitch. Allowed him to miss the first year that Mickelson. And. And we offered him a loan of £2000 which we played. 5 four bytes over the four years. But he too has to play that with invoice and qualifying, and he too is paid back two of those. I think another one. But I find most gratifying. Both his own people. 1st on the doctor. Breeze in and get this check. This. Without any prompting from us. And the young better way. Done the same. People away. Never heard it. Process you guys. Interview. Application. Yes, yeah. You can't send anyone abroad. Even. And please stay with her. In my experience anyway. That if you do find it is we did have. I didn't want any Canada. Not see them as soon as I get in touch with you. Q resource. Arrange the placement. Island. On this particular occasion must be bad. I got in touch. It was tempting. I don't feel there's something wrong. In the past. And. Something wrong? He said we have people coming out here for all of this. If we don't. That's why I'm sorry. Three weeks and it just went off. We never did. So right so leave us waiting out. Look at it. Listen insofar as we would send them out. And they give. That was done ticket. Now we just send them out. Weather, weather anymore. But in his report he made some comment. Eat the item. Told him it was going to be union firm. Not right back, Nelson. Well, it's not uniform. Strange. But in the 90s? Experience for me. Please go out. More than anything. Students to study. What state is it? Ask that because just at the moment we believe we are already discussing with. New Zealand. Possible. Exchange in effect. Through the the white Andy. And. Well maybe another one time. Resulting from. 150 years I think it was sorry. Yes. The treaty between Morris and. Dizziness. Done setting up the fund. For exchange students. Interesting. But I think it. Put out. You can almost all that we got the set scholarship sort of thing. We can do whatever. I pick a person once really because of the Contacts within the company itself. I think. General knowledge. It's in German. Something something else so we could manage to get it fixed up somehow somewhere. Your budget for awards. Where we have. Money invested and we spend the. Interesting man. Sometimes we get into the capital, but we don't like. Sounds like we got about 25,000. The company one time control deleted history. In the long run and violence anyway. So yeah. Back in

the central. But it's nice to be able to continue to do that. So where does the money come from? You need money as a whole or just for the education. Be under you have fun raising things, but I was really referring to the education in particular. Something made out of this general funds. Starbucks. Is more recent. Can't you? 35 years there has been an educational. Which is started originally by. Also. For education and like. Elephant. And master. He's back. Normal Pokémon name. He made an appeal for. Collins and one member. Cats. Not the money, but also some of it to be allocated in Georgia patient monies. And. And so is calling regional fund now. Spend. Interest. Do you have? So we we would. Hope to get more applicants in the action again. Surprising if you're giving this opportunities. I also did not take it there, so little taken up. We would love to have more. Well, this is. I ran the windows to do today. Almost anywhere I go. The opportunity to get on. Colleges. Training centers I find it difficult to know what else to do. Periodically. We try to sell everybody. The old free news you know that goes in. So what would happen at the interview with the three of you? Back over. In many cases, being just myself, I have often lost the cloud. It's loud. Ever since. Happy to leave. Um, most other words. Do you have any other rules that the education features responsible for? I mean, you mentioned the gold medal earlier on, but what happened? Finger. Frank done. Later on. It stops in the college. The reason I think. The colors used to be. No, just the other side. And. They are one of those sites idiot. It's with some advice. What's the phone number for the London Institute? Which is the. All colleges in London. And. Thank you for the tip on fire, but wanted to join the Social Specialist College. To form. And unfortunately thanks man in charge. And it is such shame. Smithville weather College is pretty. The deer is gone. Just left it there doing. And Smith, who got run down. Nothing wrong. We somehow got to be, but we had to take him. People don't look right. 100% committed to the cause they were. And I'm afraid that. Looking back on his. I mentioned we were getting come inside here and one particular member. I could do something about it. Classes were being left. Members of staff meetings. That's not long. It takes a long time to build a reputation. It takes a very short time to lose that. And what was left? Send Bella it is cold. So late registration. Reasonable. And is now available for storage. I should be going there tomorrow. External verification. Couple times I've tried to. Get it. You know Smith existing market. Refurbished and I think. Put it raining there. I can understand. Little intent. Wants to do trade education. Come up into London cross London, go back. Crazy. Well, having said that. We use the. They are lazy. Sometimes the distance in their travels constantly. Search coming to me once again. Near to tears. Anything send out class. Sent to me. No, no. Why you like? You know we start. Really, it's only six o'clock. I don't know yourself what could you say. Possible. Also earlier trying that. That's what he said to me. That's it, yeah. Boom Sentosa remember? And it is very early in my career, so. Young lad coming today. And he looked a real toughie. Real skinheads? Anyone is currently? You saw that some users are coming to see me to see, believe clumsily. So tell somebody want, but you really? He said. Could hear it dance. Suit getting back to the worship. More. Well, yes. Smithfield college I do still present. We have the price. There's companies give prizes for various aspects. Suppose challenge. Company. Steak is. Two prizes for ultrasensitive. The. To the other. Market. Thank you. Best companies? Inside surprised. This here is a language. Training people. What were the issues in that? What was really exercising your part? Well, that was the year that was the. We found my last. Liver luncheon, which is September. Started training helps. Is the company doing anything special? No. We go there. They come here. No. And we. We do have set up. Let him committing looking at what we could be doing and that's one of the things that come up with this. It is master. Hello. I miss so much in German I. 'cause? I'm in today able to bring friends. Be able to. Themselves that it creates. Human. Recognize it. Raises prestige. And in industry. Anybody have a? Not me, it's not my knowledge. Sure. I think I like to think anyway. Reputation in industry. And I think I'm having fun because. If a mouse. I'll give it. Then it's another sphere. No, not agree with it, but at least I know what I've said is what I believe in. But not happy. Expand, maintain. But it seems to me that. An organization such as this. Should also. Resource. But not any different, but anybody living in the speaker could use and come get information from now. Then we could come and you could talk with people. Get some information. Knowledge central. This should be something. Believe in books. Raven still continues to require extensively. And it's. When we had that massive refurbishing awhile back under this rule. Available. Sing not for the meeting. But it so happened that. This is Connor. I think I don't want to say that she and her husband standing again it would be. Most current today and I gotta say that throughout my whole career I think most. Industry in general. Coins feel. Anybody about anything will for anything and it is possible to give anymore. And. That's another Mrs. I'm gonna take speaking me. Together so I told her. I think we should. Lucas yes. Are you at one time or use around? Student. Local 8 marketed as a publication now, so involved with. It's Jeremy. That window for years you know page. Student information and all sorts of. I hate republications. Publications the. Let me know knows the newsletter. Bullet. This the only ones in the little green things. So that's me.

So you expanded into Europe. Tell me about that development of your business. We were always interested in getting more sales and I'm sure that even small companies like ours want to see their companies grow. I was very envious. I went to markets and see the bigger companies buying all the cattle up. I didn't seem to have much chance of buying them, only what they didn't want. And they were buying them up to go with their meat onto the continent. Going back again over many years, we were involved with the company was exporting horse meat for the continent, so I had some experience of it, or very or very little of it. Like I looked at my competitors who are the larger companies and very successful companies, see what they were doing. Their

meat was going to the continent. So began to look around. So first I look of course at Calvin, because that is what seems to be the major part of the meat from this area going abroad. I looked around, I couldn't. I talked to agents who I put an advert in the meat trays Journal for an agent. I spoke to Asians and I was just getting nowhere. Fortunately, at that time, one of our members, Chris, hold of C&D Meats you had heard I was interested. He was also interested in and he. How to export a little bit of meat to vans before contacting me and said, would you be interested? You got an easy license. Would you be interested in making a load of a meat for export with me? And we did successfully, although we paid an awful blunder, the first load it with the trace ability, which even then was in, and that's going back now 15 years and must be 15 years anyway mid 80s. Yeah, yeah it will be mitigated. That would be a fair assumption. I made an awful blunder. My recording on the 1st part had to be rejected and come to export, but this is one of the things you learn by your mistakes. We did do several loads into France and then for some reason it fell apart. We had a very good. He found a very good agent and it I think he went to then had a small thought house or at least part of 1 somewhere by Halifax and he more left went his own way. Cattle went scarce. It was the spring time of the year in Catalan's gas, and we never really got going again. And then I was contacted by Mr Faulkner regarding veal exports to Holland and to Portugal. And I thought that was a wonderful to Harleysville exports and escribed them too. And I thought no, this is the non starter. I would call them not the trade call, it stucks that's gone. Publix pasta, beef stage and more or less to the adult stage. Stage. Well, they call them alternative bill. They didn't call him Rozavel. However we did. We said we do it so wrong and we did a trial run and it went through a company to haul. And then from here and we knew it was going on to Portugal and it was successful. The first few cat Percy would slide out was a very small load. My son Jeffrey went over to Holland with them with a seven and a half ton was a trial run. David foremost brother, never lose me just at this moment went with him and they traveled all in the back. One driving till the other was tired to get round the powers with tachographs and the same things applies on the content and then to Holland and back. And we did. We did 3 little loads like that and it was proved successful. Then we went with the 16 tunnel and the loads got bigger. We were building it up. He did two or three runs over to all and with that. And then they said well, look saving it to Holland, do Bigelows and send it direct to Portugal using the same agent, but not through Holland, to cut the costs. But then the loads were getting that heavy. We couldn't get them on our 16th. I mean, it was such a way to Portugal. We decided to use transport to do it. I'm not market was development very very rapidly because they were against the live export of cars. The animal rights, animal welfare or against the live exports of cards and it could be done successfully successfully this way and it was very successful. The most that not may be more successful than ever was they were using the Canadian Type Holstein dairy calf which is very lean that they wanted over here. So that was successful and we lost it unfortunately. Also the B SC. But what we where we did game with the experience, some of that they did include a few heifer calves in those loads and they didn't like them on the continent. And I remembered distinctly saying that meat should sell here. So it is lay dormant for a long while and now suddenly there's a problem with the color car. Having cards couldn't go on the cold, they were worth nothing. Then the group of local farmers got together headed by David Fortner. Mr Ford, whose family have been farming in this area. I think he probably the 4th or 5th generation in this area who from nearby farm upbringing and twist, and they read some cards. And then they got to think about how we're going to market them. Was the market now was consulted about this market and I said. If you'll meet when I think it, what is? Well then yes, you will find a market. But how are we going to market? Where are we going to put it on Smithfield Market? Another these markets where you weren't going to get the bulk of the profit. And if it's a niche market which I'd learn through doing the small sluice through fuse piglets which we're pleased to be able to have their contract with the slaughter, then they picked up a niche market with these little tiny suckling pigs. They have an expertise and methods of doing it, which is kept to themselves. I believe is quite rightly so to do it that way they put the work, the money and effort into it and it is a success. So I thought. Well, if they can do the same with the piglets, surely if this field eats correctly and it's the eating quality that says at the end of the day, this is a way forward with the market. So we are the way forward was taken from the suckling pigs and I looked at the deal and thought well probably, but it could be market in that way. They asked me what I market it and I thought well no. I've got enough to do to slaughter the animal, process it, and certainly to keep the aging limited of it and to keep it right so that we know when the public get that meat. It's tender, because my experience of veal was in the past, it could be very chewy, and that's certainly not the thing you want, and it was certainly shorter flavor. So then I looked at the packing of it. We were bone it and hang it. We can use the hip suspension, the cuts were different, and I refer to a book from the catering butchers. To find out how they had done the cuts because I'd seen it done prior to that, I had been on the continent. And seeing the veal Hamlet, Appledorn and the way that they did it so I could process it the same way, all that wasn't the whole part of the trip out to Holland. Welcome to later. I looked at ways and maturing it and this was going to be the vital path because it is a custom that's got to be pleased on one to buy that mean type of meat again because veal is very emotive subject, people tend to think oh little cars. I don't want to see them killed and it's funny as soon as you mentioned will it perceptive develops in people's minds. So we got to get the maturing right. So I have developed my own system how to vacuum pack it, a special bag, how to turn it in the bags, it means work every day. It's not an easy job, not if not hard work, but here's the thing you've got to monitor and keep correct to make sure that when it gets to the final consumer, the quality isn't perfection. I hope we're getting somewhere near that alive. Few more improvements I will tell you out we're getting there.

Want to make? I wanted to just bring be able to bring the flavor out a little bit more and this can be done not just by the meat, but by the aging of it in the manner that witch white witch will handle it. And certainly to do with shrink wrapping that will play a big part. We've altered the bags that we put it into, and we'll do it that way. We may develop further into the trays and do it that way, but it will be. It could take me months yet and not just weeks to do it. You just can't turn a process like that. Unlike turning it tap on. So with that we had a meeting with the farmers that have got together the group of farmers and I said, look, I'll do the tests and the cutting and do the costing. He's seen the price list that they based it on. Now I did a cost into the wholesale markets where they were standing for retail markets and I said what do you want to do? Put it on Smithfield, Manchester, Glasgow and under those meat markets they will take Biggie father profit. Or do you want to build up a niche market for this product in Manchester? Building up a niche market? Once they make that, they will be selling over. Here was what they wouldn't want on the content and when they open up the export trade again it will open. She goes. How's it going to open? I don't know. I don't know when it will be. You got two outlets to your market? You've got your own niche market. What they don't want and the product you don't want. They want in Portugal. So that is the beauty of it. And that's where I see that success of it. And I just don't know how far it will go on the niche market. I think it would be much bigger than anyone expects. Of course this morning they said oversold so many rumps they have not experienced in market we're having to guide them and they were fine. When you've got cut yourself more one than the other. I'm not is what happens in any case, so with this problems to get round. But I see a very big future in it and it's mainly due to the enthusiasm driving of David Fortner. Behind it has been really, the man is wanted to see it promoted. He has made the effort to get everyone who's interested and they're equally as keen as well. He is now, well, I can't see it being anything else without success. Find that we can even get it in the local hotel. It's partly which I didn't know it was there. It was very good and that's why I asked, did you get it? The weather of it, but it's interesting and they've got their certificates. You know that they're paying attention to the actual marketing and presentation of it, which as you say, is very important for niche market, isn't it? Is it indeed it's, but it's interesting to hear from your point of view how important it is that you get the maturing in the packaging, right? I think that this is a very important part with all meat, and I think the supermarkets are. Yes, there's certainly pretty hot on it. I see well the problem is people have now the idea that meat should be hung on the bone for three weeks. Modern techniques have changed. We use a stimulator here and we can take. We can do what used to take three weeks to mature using his stimulator. We can mature in eight days to the same condition. Was interested to see that yesterday it's it's a system of electrical agitation. I guess is right. And how it works? I'm not a technology so I don't know. It certainly sends a shock system through the carcass just after it's been bled. They cut the meat, certainly sets firmer. You can push it straight into a fridge if you were to not use it and slaughter an animal. Particular beet I'm referring to now and push it straight into the fridge when you cut it, it cuts dark and can be tough. You get what is known as cold shortening. Using Electro stimulator. You cut that out. So you are improving the quality of the meat without hanging. Yeah, I know so nice this week I've ever eaten was black hole meat that I couldn't sell and we have poor quality animal and yet the tenderness of it when I've eaten. It's low hanging certainly was there, but I know there's electrical stimulation which were useful enough on the cards particular to get around this chewy problem. It does work, but I would never believe anyone have told me I would have said what a load of rubbish. How do you see your business over the next 10 years? If I had a crystal ball, I think we should see Calvin coming back in and I see us going back to the. Calvin's job, hopefully we carry on doing the slaughtering sector for the secondary wholesalers we slaughter for we slaughter 4123. 364 secondary wholesalers by include a man that specialized in meat for burgers. We see that carrying on. I see less. It's loading for the retail outlet because with the tighter regulations, I think. Shops in got invest heavily to keep going and no profit margin. They will drop out. Maybe, maybe we link up with a supermarket. But what I'm looking at is the shops, not the major supermarkets, but the smaller ones who sell everything more or less the newer Type Village store. I'm looking at it very long term. Don't I'm gonna be here that long term, but two develop packs of meat and put it in their cabinets. Have cabinets put into these shops and selling to the public that way. Because people are tending to buy their meat more and more that way as it's convenient for them to pick it up in that race. And the housewife likes it that way. She doesn't really like handling raw meat, so I think that that is probably going that way. You could also make it as I should have mentioned with the rozavel you can make it a convenience food which is easy to cook. 5 minutes in the oven or the frying pan. You can certainly develop that way and I think that many of the medium sort slide avatar call minor medium size and advertise. It will go down that line. Some already have. The answers down in the forest of Dean's certainly gone along way that way, and then it similar sized abattoirs what mine that mine is ours. If she says it's a limited company also his mind because we haven't always been a limited company. We've only been a limited company I think since 1954 on the way so I still say it's mine is mine. It belongs to the other directors as well and I see that that is going to happen. Probably this is the way of the survival medium sized avatar where you're not linked up with a major supermarket. I don't think they made in the medium size advertised, will be linking up with the supermarkets. It will be vain with the big companies such as ABP, Midland, Meatpackers. Now we've got the Irish companies coming in Kepak the likes of those will be tuned into them. Their experience in my field they will be going to the major supermarket, but I think that there are other markets out there for the meeting. Size abattoir. And that's the thing we've got to start looking at. I've got it. Probably this is correct. Terminology will be even further processing on the plant. In America, where there were smaller plants. This is another line

they've gone down, but the general public go there and buy the packs of meat and not to the shops. So I'm told. So I don't want to go down selling direct to the public that line, but I can see that in the country districts we could have had way that way, particularly if there's more retailer drops out. Feel about the future. It is hard to get a fix on that though. They want to see the future of this plant. I'm going down slaughtering. I'm going back to where we had an emergency service in place, like with before, although it is there now, but there's very little volume flew there. We still provide the service and I think they wish to carry on down that line, but they're beginning to see slowly that there is more of a future in further process introduces boning and packing. In fortunate part about his arm too old to get out and sell like I used to. I don't wanna start going around the shops and canvas in business. We may have to take on a young salesman somewhere who is die mannequin. Necessarily this is 1 field where they do not necessarily have to be a meat man, as long as they've got the education, can do the paperwork. Probably computerized computer literature call it, which I certainly am not. I play with the computer and that will come up. I mean many of my competitors on the email and goodness knows what now. But at my age it's certainly passed. Doing that, I can do my fingers quicker than we had on paper that you sent it into a computer. No they don't. 35 to 40. You were not taught with computers in school, so they've just missed out in that era. Like without the paperwork, they don't. It's alright, it's a thing. I think you slowly pick up I only one thing I would go on to. From there I would like to see them slowly get more politically involved. Don't be politically so. I mean in the meat side political side. Yeah I would like to see them get more involved. We have the Federation of Fresh Meat Wholesalers which has just changed its name to the British meat. Do you have written it down this morning? She's meet saturation or we call themselves now. Here I am the Treasurer and don't know what we called. British Meat Federation. Now this the the name of that has been altered simply because as we've just been discussing more, meat members are not just slow. Just now we have gone down the further processing line and this is one of the decided that there was a better name for it is meet Federation then the Federation of Fresh Meat Wholesalers. And you literally just changed it this month. Is that right? Yes, it was approved at cons a week ago, so we've gone from the Federation of Fresh Meat wholesalers to the British Meat Federation. This is really to be forward looking and it will certainly look better when we come to export and with the European trade associations. I have been a member of the Federation of Fresh Meat Wholesalers now. Full of over 40 years. It was founded in Liverpool in 1934. I believe the name then for the name was the Federation of Fresh Meat Traders of Great Britain and Ireland. And then in 19 mid 1960s they changed their name to the Federation of Fresh Meat Wholesalers. I don't know how why that was done or probably. What do you do with the Irish situation? And they moved the offices to London I gather about that time. Certainly after the war. I became involved in it when it was more or less little. I employed two men. Through the late George Fox News to come, the local Beeston market. He was a pig buyer from Manchester. It was probably at that time the biggest in the northwest and he said to me, I see you're buying a fair bit of stocky wholesale, and I said yes, well, you ought to join the Federation of Fresh Meat Wholesalers and I have not heard of the Federation or whatever it was at that time. So I I joined and I took no active pass in the Federation and then they had. A meeting or by warring with when they started to alter the regulations, you must improve hygiene. They were having a meeting at Warrington and I had a missed phone call from the General Secretary for the area. His name will be called him to come to this meeting, so I went to the meeting and I was immediately interested because they were discussing things that were slaughtering and was affecting me and they said, well, you're not going to one thing that was raised. I remember it particular, you can't have wooden handle on source, so I got up and said, well that's funny. We switched only this month from wooden handles. The plastic handles and we've got to sterilize the sores and dip my store in the sterilizer. Handle melted. So yeah, they began to see those problems there. They gotta use a different type plastic and this was followed up. So I went to several meetings after that that is now 24 years ago probably. I went to several meetings and I thought, well, this interests me. Probably I ought to go to their class poker meetings 'cause it interested me on little bits of things that were discussed at the time, such as hide improving and so was discussed at these meetings and then they were having a conference at Windermere and we were going to go on holiday that week. So I said to my wife, adult, I think we want to go to the conference at Windermere, but we haven't booked in. We'll just turn up and go to the conference so. I went to conference and it was when there's a dispute on will M else about a pain in the levees. Nobody wanted to pay well. We never do IT industry do I? I distinctly remember that he was very entertaining and many old friends there late. John Greenwood was a friend of mine for many years. He sat next to me. People there that I knew people that I didn't know and they absolutely overall big. I mean George Adams was on the presidents on the top table and when I met George Adams and Morgan so they frighten me to death because they were big companies and he was me. Immediate compared with them, but it was the dispute with MLC that took me on Thomas Linger from Accrington, got up and spoke. He gave a very entertaining speech about why we shouldn't pay MLC. It was emotion proposed, a conference that he proposed, and he made an absolute brilliant job. Lloyd's will never forget it. It was very entertaining and we all decided we weren't paying them else someone else send it from there and I voted for it and I thought, well, this is very good. This is for me. Still not collecting that it was political, it was just part of my trade so after that I started going to the area meetings and I was asked. Howard Marshall was our area chairman at that time. Would I go on the national executive? Although the sound is really all this is very big for me, but my company was going in the mean time and I thought well it is looking after our interests. I should be paying particular part, so the next meeting I went to and it was came up about slaughterhouse license and

he only had them for 12 months and invested a lot of money and time and it should go for two or three years. Your license copy you see. So I got noise in about this. We are working hard and 12 months it must license. You have no guarantee so could they put emotion prop for they said for the next conference which was at Plymouth? Could you put a motion forward that the license covers a further pier? So it suggested two years? Or who was going to conference to propose it and they looked at me and they said, would you propose? This is emotion. Well, I said yes 'cause I put this motion forward. Hi Mr, any actual if it was, if I remember rightly was the 2nd it. However I went all the way to Plymouth. It's a long way for me to Plymouth to Plymouth to this conference. Oppose this motion. I can tell you now. You had to get up and address. Always talk people that I didn't know well and absolutely. Menace two people are on everyone. I have written this speech out. I was going to get up and told and tell her not in this big room. 250th top people in then there was me going to get up and tell them what we wanted. Come with a little North area like and tell you I stood up. And I didn't want anyone to see my face. I've got to do it. I've got to do it, however, I've been on the console platform for many years, so I had a bit of experience and I managed to get through it and it worked good for young people. Will I have to come to more meetings this evening you I'm the executive now and keep coming. So I went on for many years and then for some reason, although I don't know why it was the Chairman, still mine or my chairman is not master. Went on for president for me. And they wanted area chairman and suddenly I got lost in it was earlier Chairman before I knew where it was. So I did not. I think for about 8 years. Up and down to London taking part in committee. Getting to know more about the political side as a small operator I would not. I don't. I wouldn't have realized that. Have I not gone to it? I got to know the Adams is the shield, the bakers, the oral Jones of this world, and certainly the answers to the late Bob ends of the recently guided probably 12 months ago was a terrific help to me and guiding me the way you should go. However, I thought there would have been earlier today and after a few years I would stand down. And then I was approached, would I? They wanted a junior president elect because you do two years. You know, President elect two years senior President elect before you become president so. They approached me like. Consider going forward for president. I gave it some thought and I thought, well I managed to get this far that many mistakes. Yes, I'll do it good. How will I stand up these larger companies and no need to fear because they're on the same things as me. We all got the same interested so I went forward and I was elected. I assume the President elect that was in New York. I think it's about 85. We done the dates don't matter later at the part of the 80s. So then I become more on the political scene I was elected to the joint Meet Council which met at Whitehall probably 3 times a year. I did that regular so that that was the joint meet Council. That was where you linked up with the government. This is where you link up with the government where they send their representatives in and listen to what you have to say. There wouldn't be only the meat at the slaughtering sector there with the retailers, the NFU, the poultry people. No, the Wii didn't actually come in there, but there's certainly the ladies there who are representing an industry that we've got the Wii View. You've got to feed people. You've got the MLC had everyone there, so I started to get an input there. Not saying it was a big input, but I was slowly learning and then they sent me to a convent. They couldn't get the speaker to Windows going as a speaker's against the Scottish Meat Wholesalers Conference, but went there and that was the 1st. They just picked off, probably call it that I made. I didn't know was going to speak until 10 minutes before conference when I was told a lot in a 20 minute space and nothing written out and it was at the time when Jeffrey John had just become chairman of the meeting Lifestyle Commission and he was only got to get back. See Cardiff place somewhere I don't know is it. Well Chevy cannot be FA Cup final rugby union file or something and he was getting his slide when I had to follow him and speak there and then actual. Find that did me a world of good as a public speaker because I'm not in written out and I just had to get up there and speak or sing. It was on my trade and I was able to chance and it it went down very well and that gave me a lot of confidence. So from there I followed on to the senior President elect and then in 1991 ninety two I was president of the Federation of Fresh Meat Wholesalers. It is a very big honor to be elected at that. Coming from such a small beginning in the bathroom to become president of the Federation of Fresh Meat holders. Also, this certainly wasn't Mama. I could not have done that without the support of the larger companies. And some degree the smaller companies the main members of the Executive Committee at that time. When I started out, as soon as President elect we had Mark Simons as our general Secretary who left during my term as junior president elect and he handed over to he was a barrister, barrister in law, very educated man and good Luck Man. And then I was involved in having to select a general secretary along with my senior members of the header. Nation George Adams. As long John Baker Bill Parker names that spring to mark to light and we got it down to a short list and they said, well, if you're going to be the next president, we think you should have a say in who is going to be the general Secretary. And we met up with an ex military man Peter Scott. And without Peter Scott's guidance, I don't think really because I've tunnel vision of the slaughtering sector and not so much knowledge of the further processing sector. The knowledge he picked up and there was speed that he learned. Every sector was absolutely amazing. I tell you I couldn't have got through that present as he without the support of Peter Scott and certainly Janet Lim, who is the assistant secretary. I couldn't have got through it there without their help because they could pick me knowledge of anything I wanted. Anything I didn't understand, they would have it ready for me if I was going to big meeting anywhere and even to this day. And now I am Treasurer of the Federation of Fresh Meat wholesalers. I couldn't have got through it without Janet Lynn because. Anywhere I went was always a brief ready for me. It's a tribute. Your supporters there tell me a bit more. I mean, what were the issues that faced you while he

was president? The main issues, should we say the main issues are the upgrading of plants that was the main. President, they were supposed to be completed, but they gave further delegations. That was the main issue. I say I'm referring to the Ministry of Agriculture, Fisheries and Food. They gave further delegations and they've been given delegations and it's still going on to this today. They still have planted still although basically giving them easy licenses that are still what I would call that God still do more work but still getting away with extended part. So the upgrading of plants was the major thing at that time. We got to get the best deal we could as president. Four members, if we could get the round, the thing we got them round it. Is the Minnesota give way now they don't like it? Well that was their fault. Anything at that time was improving on the hygiene and certainly at that time it was there we had also got to watch the health of the animals. Probably was the blue ear disease in pigs, was at that time, but the major thing was how are we to get our members through and we wanted to keep our members. We didn't want to see them out of business was speaking for them looking at things and saying how can we be helpful if need be. Take their case to the ministry. I mean we had one to be fair in the Northeast. He was in a town where he could not get to gates in, but there was ample room in two days, two days, two separate entrances to his planned, but he had ample room. He couldn't have possibly two days, but he had room to get through the gate and then diverse round so we had to take his case to the ministry and we got through that for them. And there was also little cases that loomed like that where they were short of space and how can we do it? Yes they could do it, but how? Because it didn't quite tie up or what they were using them as the Varden Macon. And it didn't quite tie in with that, so we had to find help numbers round like that. We got members into disputes with local councils. We would take that up for them, maybe I don't know what you take. Take it out with the local councils and if need be we would send representation. If it was a small avatar I would do it. If it was a larger avatar I think at that time Paul Scheel was doing it. So we were there to help everybody to stay in business at that time, good. And now you're treasurer. It's strangely enough I followed on from Jack Blandford who was the president of the Federation of my Sweet wholesalers in the mid 60s. And he's done it. He did it, and I think he's done it for 22 years and I took over him. I certainly can't do it for 22 years. I'm quite happy to fulfill that role. It is not a difficult job, but what I do find difficulties. I'm handling other peoples money and to handle other peoples money is worse than having your own because he would be embarrassed that everything went wrong. Federation is very strong, although is a decrease in number of plants. Up till last week I think I'm right in saying that our membership is even higher. We're having certainly in the next few weeks. So now we still have more members than we had 18 months ago. Is that because of this change? Well, I know it is mainly because we've got less member Les Abattoirs, but they're bigger throughput plans. They need the help of a trade Association and they appreciate that. I think that that is the major reason behind it, but what must be remembered that 82% of the animals slaughtered in this country are sorted by members of the British Meat Federation League Federation of Fresh Meat Wholesalers. The Manesty are aware of this and that is why I think that they consult and lays with with the age of us so closely. The other thing that the Federation work. Involved in with the setting up of a meat hygiene appeals. 5 human. Where is another operator. Lose his license through structure, hygiene, whatever. If he's not satisfied that Mr Right to refuse his license, he can then go to the appeals tribunal. I do an actual fact sit on the appeals tribunal for the smaller avatar operators in this country. All the meat industry we have myself on it. The late Mr. Lance was on it. Going forward has died, so he's no longer on it. The other representative the red meat industry is John Vernon, who wasn't till a few weeks ago. Local butcher in the naval invasion Tattenhall here. Isamitt he still sits on it after the white meat industry opposes industry Mrs worse not from which it sits on it. There are also two vets who represent the battery side of it, and the chairman is Mr where he is chairman of the Industrial Tribunal. Mr. Michael, where So what do you see? And so this is a tribunal when there's a dispute about. What went wrong? If you like with the IT is a tribunal. It's that the operator can go too if he thinks that he's had his license withdrawn that he thinks he's been unfairly treated. We have done many cases. I think I've dealt with six. I think all told in the last two years. There's only been. It does not sound. I don't like you know the exact number that is there and it was set up with the help of the then Federation of Fresh meat wholesaler that was put in place and I think it's likely shell is. There should be some means. Other people because the ministry or the vets around the plants may not always be right. The minister has to revoke the license, but they can say we have to decide was the Minister right to invoke the license on the information that he was given? I was appointed by law songs that will leave. That must be 6 times this, like six years ago. I love songs. I thought probably with the last change of government so there not be reappointed. Apparently I have been. Well, we now under Vista Rucker. I have had the pleasure Mr Rooker coming to look round our plan because he is the MP4 wall so lovely and he said Rang me up and he said look I'm so near to you. Can I come and see round or small plants so I know what's gone soon as he was appointed so I met him as I met you accrue station and he spent the morning here looking around and getting to know what goes on in the industry and what was wanted. He also visited. I think a BPD Ellesmere for same day or later that day or later in the week. To see what the larger plant look like so he has some knowledge. I know a little bit of knowledge can be a dangerous thing, but at least the Minister was looking. Have you found them generally helpful in the ministry people? I, the ministry I would say yes there are helpful, but they tend to stick and not look at the thing. The rule book says and that is it. Instead of standing back and looking typical there mellowed and they are beginning to look. I got to do with you are. We criticize about it, you know, is it right to criticize and their appointed to do its job? We want to see hygiene light. I don't know whether I criticize them or not. We do pretty size when they do get a lot of

stick, particularly new national metrology service gets a lot of stick. It's got to be got right. What's wrong with the meat hygiene service costing at the moment, which I think they will get? Today you've got to have an independent body, some say Oh well, you should be able to employ your own meat inspectors. Yes, that would be fine. But if you employ something they weren't doing, they were doing the job right. You wanted it doing another way, you would have lean on, say, will you do it? You're gonna get the same. It's not gonna work. You've got to have an independent body, such as when we used to be on the local area. Health was already right. OK, now I've got a whole list of other professionals. Stations here what other ones would you like to talk about? Um? The WMS A that is the Scottish Wholesale Conference you mentioned. Then yesterday I think probably it was in connection with the talks. They have just, I think, Merz. I'm not that it will fail where they're up to, and they have just made, I think, with the Scottish retailers and how they've done it, or what I don't know. And they've been having a secretary or problem over the years. They have that they haven't as many members as we have. You wouldn't expect it because they're all large operators more or less large operators in Scotland, and it is a different field up in Scotland here. They're more, look at it more the way that I look at it. Looking back to the farm, we need him and producing and getting everything right, but. And the members of the Scottish Meat Wholesalers Association or whatever they call, let's say MW. I think they call themselves have been very forward. Certainly in the exporting and the further processing, the packing of meat. And they've got a very good brand name was already Angus. I'm hoping that the words black will become as good, but they have got such a big lead on it. I'm not too short or well, too ever catch up. Certainly they were with the Welsh Lamb because that is what the public wants. He knew about the Welsh lamb and Beef Association. There's there's an Association for Welsh Lamb isn't that, is we? When we found him well but when we were farming in wells and we had to slaughter their own lands, here we use that actually sell themselves as balamb and it become more or less a brand name. And it did sell. And then they all started their own organization. I did have taught the Knicks Alec, who is there? I don't know. Senior executive Alex is correct. Name a few weeks ago about marketing. Well, speak through here, but the trouble is part of Chester is in Wales and the part that I'm in is not in Chester. So I'm not too sure that we can actually allowed to access the light. It was particularly for the political situation that we can actually market it as a wealth beef, although all the beef that we pack ourselves here just come out of Wales, we know it's well, so we've got full trace ability and the chairman of the Welsh. Captain Archdale, who is oddly chairman of the Welsh marketing organisations. Many of our capital actually come this far, with particularly by them as he sells them through the sunglasses market. Listen what markets or markets in Saint Asaph livestock auction? Learn Monday, which is a lovely galley market which closed and they have a big sale every Thursday at the back end. It is big solo, have sudden two 8000 lines in there. Yeah plus 2000 use 3 or 400 cattle so it is a big market at the moment. It's not as big because in Wales the climate is dishon is different and it is more less seasonal markets although that has slightly changed. I mean I think last week go down to 80 Kaplan's and outs of our kids in a few weeks down. Look up to 200 and at the back end it will go up. But they control a large area for the livestock marketing sector as they draw capital from as far as Anglesey. What about the meat and livestock Commission? The government body? Relation with some say foreigner. Some say against it. I believe we've got to have a meeting livestock Commission in place. But it should be more in control of the industry than what it is they're having problems at this moment with a pig sector. Mark Adams is a spokesman on that, and I wouldn't like to infringe on what the work that he is doing, but I think it should be there. My own view. It should be there really as a marketing tool and doing advertising. They got far too many channels they going down. Yes, in some ways it's helpful. Certainly what I found helpful was very interesting on the Welsh line and Hugh. David think his name is Lizzie Area Man in Wales. He has taken a brilliant yellow, improving the breeds and he's made tremendous headway, so it be a shame if that was lost. What I don't like about. Play MLC years ago we had area liaison groups, each area North Wales had their own Norton area, had one villain there. We had liaison groups. We only be used to meet twice a year, but you got the WI. What the process is. The slaughter of the farmers. The high people got everybody together and they discussed it with the Commissioner there who chaired the meetings. What was vital to that area? And then the feedback got into Milton Keans and for some unknown reason to me they decide you all. This wasn't a good thing. It was costly. Put these meetings on and they did away with and that is a great shame because it didn't just one body. Then each area was getting us a bit disappointed that they have finished. My yard chain was my agrees and he he must be still going. He must be 8586 and he was our Commissioner and he made a wonderful job of it. They used to meet mainly at balance. Sometimes that planet blows what we met twice a year and I felt that he carrier then was getting more in Portland now. Now it seems to be left to just a few in the middle to make a decision and why it would be is that why you say they're not in control. I wasn't sure what you meant when you said that they weren't in control. Really, they're not in control of what is going on in the air. They seem to be a little bit. I shall send more. Let's not control, but a little bit out of touch with each area. It is strange to me going to London to meetings and coming North and all seem to think North of Watford. We seem to get a different view, a different standards. To me that is becoming apparent. It's the same with MLC and Northern areas are more anti MLC and the sudden areas. But it's a shame that they did away with those meetings, but they they did do a lot of good work when they had that I would like to see that come back, but I don't think that it will. What about the Institute of Meat in the Meat Training Council? It's a good thing, but I did touch on it yesterday. I think we still gotta go down this line where the hands-on operator can get a place done and get the shiny badge. Other bits of the meat chain. Is it mainly I'm a slaughter myself. I wanna speak mainly as a

slaughter and sees it. I think they're doing wonderful work with the boys that come out of college and decided to go into the meat side in promoting other products such as the further value added products. And this is where they pay a very big part. Certainly it's a good for the independent retailers. They can put the lads that's learning the shop trader and they can go through a wonderful course and come out with the certificates, whatever. So yes. Although Peter Huntington made a big success of it and he is left. Meet training council. He's gone to another English film. I did what it was, completely forgotten. He has moved on so someone else will carry on. I don't know whether the bridge is carrying on at the moment in his place or Prednisone like that. People that are in the know and understand that side of the industry. They will be there and then they will appoint somebody else. And it's a thing that has got to go on and I think. I'm running out of time in my life now, but I think it will be very important. More important over the next 10 years. Good good. Right, what else have we got here? Metreon Institute of Meet the National Meat hygiene service. Mechanistic Commission. What about tell me about the worshiper company, which is? When will you? When will you? Now I became a liveryman in 1992 I was asked before that, but it was did they appear, period. When I was a senior president elect. And I opted not to go forward at that time. But I ask that Mr. Bridges propose me, don't bridges, propose me and bothering so as my other proposal propose you call it. Second, I did ask that they bear me in mind until I finish my presidency. Because I feel that if you join any organisations or whatever it is club or whatever. If you can't give it so much time, you're wasting other peoples time and that would be very unfair or instantly join my term as President I was asked to address the court following the monthly lunch and I'm at the very educational to do that. So that put me in good stead the match that that time was fed million. So I got to know him better. People, it's important in this way, it doesn't matter which way you look at it. They have got the top people in this way of the meeting list, Lee's liveryman whatever. Even higher than that. And I was delighted that George Adams last year was the Master of that. Although I was an important problem, I couldn't get to all the port launches to give him the support. I would like to give him. It would be delighted to see that George was there and then yeah, and a good job we made every of it as he does everything else. As he did when he was president of the Federation of Fresh Meat Wholesalers, I'm pleased to be hard to George hasn't, as all of my friends and his wife's friends of ours, and it's only through the Federation of Fresh meat wholesalers and met them. But there are many other people in there that have really done well for the industry. It means that when. You are finished with the retirees from the Federation of Breast Meat Wholesalers retired probably out of industry. You go to the court luncheon. It be surprised how many old friends who meet at that at the court, lunch and other functions that they have. I would like to take even further active fast and at the moment until I retired fully. I haven't the time to give to it that I would like to give to it. What do you see is the role of the worship for company of butchers apart from the social and meeting friends and so on. Certainly the charitable organization which is part of it the butchers and drovers and charitable Institute. That is a major part of it, but I mean last year they had. How much did they raise for other charity? I think at the annual dinner they raise £84,000 at 1 one night and it is going to a very worthy cause. It's for people that's fallen by the way through hardship and no fault of their own. They have the smooth field homes. I am not a member of the button Drover Tower Institute, but I take a keen interest in it. For many years Ken Clements. Yeah, I think he is still chairman of that, obviously. Yes he is, I mean. Read into it is a credit to him, so it is not just meeting with people. It's the charities that they support. They also have a Masonic Lodge. There haven't been to level. Oh I'm a Freemason myself. I haven't actually been to the lodge there. I probably will paid a visit when I'm down there as it's normal after the court lunch and they go on late and I have a journey train journey home, but I haven't actually intended but I would like to go as a guest there to be actually see you. To take part in there. It's not about becoming a Mason. Will you tell me for the tape, please? Yes, certainly. I became a Freemason only in the last 12 months. The reason for that had made a Mason before was that I was going to be amazing some 19 years ago and the man that was proposed in the UN40 sperm went into receivership and he had to drop out. So I had to drop out and we have near. Here we have two large is the Tarpley Lodge who they were just you could not get in that they can see where there were that many people waiting to become Masons in this area that you couldn't get in. Don't buy a turn of fate. They knew this was happening and they decided to form a tightly farmers launch Checker farmers launch so there were vacancies. Our thoughts, another friend. Now see what I like to go in in Lloyd who is Brother Mason would like to go in. Yes I would and I was fought enough. To be accepted, I'm keen in Freemasonry, not yes. You have to believe in God, but it is not a religious organization. When we go there, we are talking after we have the festive board and we're talking things in general. You meet up with people and it's something that I enjoy. Certainly learn to enjoy it, but it again is. It's not. Is it a social thing mainly for you? Why are you so drawn towards it? It is my belief so that we should stick together and work together. It is not the cult that it is made out to be, something that people make it out to be something strange and weird that is quite untrue. It is open to anyone and I certainly like the social side of it afterwards where we talk mainly doors, get found to business and trade. But you hear tales along well, if you're amazing, you get 2 orders of discount. That is a load of rubbish. Lot of rubbish talk about Freemasonry. They also have a charitable side that there was no. Yes, very much so, but then that is the main part of Freemasonry is raising money for charities. I'm not that all favor what we have raised at Tarpley, but I know of the years that only large as a razor terrific amount of money. But I'm not that all favor being reasonably new in the larger how much they have raised. It used to be said that it was really sort of against religion rather than being part of religion. What would you say about now? That's. Right, I'm sure, but we remain little late to the Old Testament or not to the New Testament

it is. Actually it is quite religious, but it's not all religion. It is definitely not against religion at all. It is a wrong. Conceptional did. OK. And what about rotating round table? Do you have connections with them? And I never did before. The simple reason I was all that busy here until the latter years I haven't been able to take much part in anything. Like last, many years ago I was part of the local Beeston Castle Young Farmers Group. I was part of that, but it wasn't a farmer and I tell it to fill that. I wasn't quite part of. It used to feel slightly out of it. It wasn't their fault, it was just circumstances. I am a member of the National Farmers Union. Over last few months I haven't attended many meetings. I should because I feel as I can put a bit of input for the meat industry and I think I should go. I did the previous 12 months. I did send quite a lot of meetings. I have twice been there to address them with problems connected with the meat industry that related to the farming organization. You sit in the Jockey Club. You're telling me what? What do you have to do with? No really what it is I work do work for the Jockey Club on race clearance. A member of the jumping bug. Although I did hold an amateur license, Clyde on the flat from 40 years ago, yes. Yes we did, but that's why I just misunderstood. I thought you had a. Remember that I couldn't afford that. I couldn't talk. Are there any other organizations that I've missed out there that you have an involvement with in there? That's quite enough to be getting only the local fishing club. When will come onto your private life, we haven't sort of done. Done that at all, but we will finish up with that, right? I just wanna let's take a pause. Once I fix it, we haven't covered at all. Is your relationship with unions or in general? If you want to talk about the general meat trade position with the unions, I wonder if you would comment on that. Yes, I'm delighted to comment on that. I believe that there should be a union. I don't think it'll union on in my plans at the moment, but I think that there is room for a union because I mean what chapters? The working chap on the line and something goes wrong. Who is? He got a representative if he's in dispute with the owner of a plant and I believe that there should be many years ago we had the Joint Industrial Council where that swayed met regular with the unions and we used to discuss wages, conditions and everything was sorted out at least once a year. We met with them. The chairman of that route was the late Arthur Clift. And even if you could join, I was fortunate enough to serve on that Council, for I think 6-7 years. I was like something like that and we did make headway and it created a repor with the unions on the work men in the workforce. I have to concede that the unions can get too strong and be very dogmatic, but there is a place for them and I think that they probably will come back. Now we got the National Metrology Service, the band feelings that it causes with events. The meat inspectors. Understand who work together and work together as team. They do work together. They stick together. They socialize together at night. They work as a team perfectly well and I think we should see the unions come back. I have to raise this at meetings and some of the big firms thing that it won't come back and I somehow think that particularly now we have a Labour government that it will come back and myself. I would welcome as a slaughterman somewhere, a union or for them to get them around these problems and help put the bad feeling out. If you've got a Union representative there. You're certainly getting headway and someone to talk too. Not Amanda. We stuck out on his own out of a job for Stoughton. Such a hullabaloo, arguing and fighting it would put it out. There have been a lot of trouble between Slaughterman vets particular. The principle areas is coming round interfering. There's been a lot of trouble, and I think somewhere there should be a unit or represent them. So you get fair representation. So for my own view, it is a very minority in view. Note, if you I do support a union being in place. Particularly for slaughter and before they come under the Union shop, distributive Allied Workers Union. But I would rather see a more lying fallen that wasn't particularly slaughterman. They came under it, but I would rather see the stronger representation somewhere, and it never has come into being just a slaughterman. Do you men in the complain about anything here? Do you have to? If we do, we get the complaint. Something not right, but it isn't quite like a complaint. They come and tell me we've got a problem and we sort it. We don't actually have a complaint. Run it's alright. Well like I saw yesterday about the atmosphere in your place here, which seemed very calm and professional with you. Like I mean you were talking about. The comradeship and the characters, particularly in the old days, would you like to comment on that? Of course it was great in the old days of it things were different, but I think the same comradeship has prevailed, certainly over last 50 years. It is still there, certainly with the old. Tradesman as I call it. They can do the job right through. You may not get in the bigger plans where you get one man who called himself a slower when he isn't doing 1. Job and can only do that job, but certainly when they can do the phase right. So I think that the comradeship will be there because if one finds an easy way to do any job he will show the other one and it does work out. So yeah, I would think that it has not varied over the last 50 years. It is still learning with the modern plans. They still think it looked like it would be a helped by if we had a union representing them. There relates back to the two. You could relate the two together. I mean, do you regard the menu employers as friends? I mean is it? More bumps. Judy Garland you equals. I think that's the way between ideas as well. Do you like to go from the drink like that? Slow don't work hard, lose a lot of sweating today. You will go and have a pint on the way home and I think that is a way of life, but it's certainly regard them as your equal. I wouldn't like it any other way. I don't think I could work with him if it wasn't. If I was the big boss walking now and I don't think I could work with them. I mean, I've done work on those lines myself. Oh slaughter do anything I have already have account, but I do do it. What about the language in the plant? It always got. It seems to be funny with that slogan, there's always been a bit of swearing in Grambling going on, but you have to take it if you find it. And it's not that bad. I think probably will get it in any other industry, although we seem to get tired as we are the rough crude people that is not normally the case, but we do get a language problem. Funny enough, one girl that worked here, Lydia

Houston, worked in the bone implant ear. She also went into the slaughterhouse. She's now police woman and she I saw only a few weeks ago. I saw another few weeks ago.

### **George Adams**

This is the third tape with George Adams. Sue George. Here we are in the 50s we got married in 1949, who which was your first child? Caroline Caroline, right? And then. Mark Mark and. Judy. Answer Where are you living? Over the shopping aggression. Right? And. When was it then that you built your own house? Wasn't that in the 50s you told me? Yes, it was one. After the war you want to get a license too. Build a house, right? Limited in square footage. I managed to get. Where was that Rd? Yeah, where you're staying tonight. No, it's there now alright? Tails. What's it like? Mount. Right, I see. Spanish, is it really? What was your your brother? Your younger brother John? What was he doing at this time? Was he in the business too? Yes. And he was. Mine is. Config around and after he did the retail round. He started wholesaling powers and did around around Skegness. Right, right? Is wrong, so widening me fee yes. Made up meats right and where was he living? Did he get married to? Yes, I'm thinking it down. He lived over the pork shop 1st and then then built a house. Stand Holder. And it was he having children too. 3. Boy girl I'm only asking this because some of them are in the business now are they? Some of his. OK. Good, OK, so you there you are Carolyn, Mark and Judy. Were you still working very long hours? Did you have much time to be a parent when they were young? Did you enjoy your children when they were little or yes? Sue you are. The money's now. You still trying to manage them, do you? So. We talked about your two shops in Stamford and you went on expanding. The retail side. Didn't you went with the slaughterhouse expansion an until you ended up with 23 shops and like you said she's fantastic. So where would they? How far field where they spent? Leamington Spa in Coventry. And I wanted to be on the Kings. My brain. We were talking about your staff and your principles concerning your staff. I understand that you're very concerned to keep a happy and stable workforce. Is that right? One of the reasons I don't want. More than three or 400 people under one roof. Director. Complete know that people. Of course. We still. Product sales on being a family business and the Word family and how it relates to this stuff is self important. My daughter. Dana personnel, director. Why was she put there? The personnel director equals 2. Make sure that workers. Were protected. We have works committees. We followed the. Joint Income Industrial Council. Why is reviews? So at all times. You must. Neighbor give an award which is below the recommendation of a JIC. Any form of. Bonuses and so forth. Asian. Sound raise? We have a lot of people. Or Bing weathers. Over 25 years. This year I had six to my house in recognition of 25 years service. We always win. We take if we take another factory on the previous. Length of service. And we ought to know as many. This weekend Christmas party for. Saint James Money is in Directores. Come to my house. An evening cocktail party. Just. To try and level best. To keep in touch. Win. And you think that works right down to the lowest level, does it? I don't know how well it works. But I believe that. We would soon get vibes if things weren't working. The channels of communication you've built up obviously good. It could always be better. Communication is a very difficult thing. And to get. To talk to me sometimes. The older ones will talk. No, not always saying it. Would you like them to talk to you more? So why in the world, I'm afraid? And you don't have any unions here, do you? No no. We've got to tell the line. No, you say that. We do. Black news changing. When we are having to. Chloe. Seasonal workers when the supermarket said. Promotion. Which is old string the whole ham. Really I see. 20 people extra in a factory one week. To the next. Difficult. Make sure trying morning duction sample. Christmas trading in the peaks. Front, so getting so much greater part. We've got to learn again. Shift pattern. It's changing night work is changing. How is that changing? Oh, I'm gonna go more on. Say the word in the sentence till five it's. 6 till two and two till 10. Chips which. Some people like it, some don't. Summer. As long as. But they don't like it, although you can get. Launch it because. I don't mind when those things are time coming out to work then. But how? It's changing because. Did the man for man customers get so? Then we have to find a way of responding to. How much notice do you have? If some Sainsbury's or Marks and Spencers are going to do a promotion so you know you're going to be very busy? How much notice do you have? Well, there might have been more in fairness. Notice of the plan promotion. And they might be. I budget on the volume. Required. But if it goes over the top, you've got to make it. Lots of times the budget is not always right. There's not all that many things that you can get advanced in time because of the shells live, and some companies won't have this freeze. Use rose and me. So we have to do what? Whatever coin. So where do you? I mean, do you go to the local job centers and and ask for another 120 people for particular week? Seasonal workers come. Problem. Dan Moss is a golem. Close we were dead. Electronics for students doing this summer. Students doing Christmas. Students actually are very good workers. Their times down always ranking song. With the guns that we want them, you mean they want to go to parties or something, no? Yes, but they might break up a week too late. Yes. You telling me when we were not recording it you find it but University graduates will only stay with you for a few years. Is that right? Yeah, why do you think that is? 'cause? It seemed to be. You still into them. The way to get down in life is to keep moving. And it seems to be a modern training. Did you know? Food aid only if you stop there too long. Find that very sad. But it's a thing. It is sad, isn't it? When you need to. Stable workforce of people who get on well together and yes. The reality of it in the moment. When did you start? Training programs induction. Regular inductions and so forth. Oh, we've done that. Say yes now. We have a. Training officer now. I would argue. We've always trained. But not,

I suppose, in the formal way that the modern people expect us to work well. How did you train when you came back after the war then? My nephew is a boy going round on a country band. You were trained by the butcher. You were in the pie review. Trying to do different jobs. Would you be training on working and doing it rather than by sitting at the desk training and? Big believer in on the job training. So now you have people sitting in the room and looking at diagrams or or do you have to know? This is a bit different, doesn't it? And when did you bring in things like pensions? Or that that sort of all those sort of things? Pensions for management. Supervision. A number of years. Weekend pension scheme for from the state. For the. Workers what's the time? When inflation was going. And I believe that it was more important. The pay packet. Give a lot of friends. Wow, so big believer that anybody who hasn't got a pension no very wrong. Tim. Epton. Such a jump today to keep pace with the overheads and so forth. Good, OK will. Is there anything else you'd like to say about the staff? Again, thinking of your time when you started after the war and today. But what are the differences? Do you see? Do they come from? No one judges the two. Because if you have a business. With 34250 people. Working for you there is some. And immediately, if you're any good of management are lovely. Feeling with them in motivation and so forth. When you get when we talking in the hundreds, you need to go back to school. Because. Supervisors in. Assistant managers. Stand always now. To handle this sound. And that can cause. Problems. I don't know whether it's through training or intuition, but. Is an area in which we have to be. Contentful word came from. What does take your point is certainly very different. With 30 or 40 people and the 2000 that you you have today, it's a completely different thing. Too many wonder. Alright, I see there's a report out today, I think by the Industrial Society saying that they no longer want. Matco managers, but today's manager is much harder to judge, but they are much better teamwork and getting cooperation. Would you agree with that? So what's needed is it is a leadership quality where. I mean, you used the word motivation many times and in our talk today. Would you see that is one of the major rules auto Manager. I'm in a disadvantage. To answer that question. Because I believe that can only be one stationmaster. Photographic also. The one man. He hasn't got the skills. To Nick Nick his team together can't do his job. Rice and. That's where the schedule is. Coming in not just here. Delegation letter. Very strict as well. I mean, how do you feel? Presumably you've had to sack people from time to time, have you? Yes, it's very difficult not using course. And. We have to go through all the. Soccer procedures today to to do that which is very convincing. So when. They're not looking ready to something. Probably should be more clever in. Who will select to take on in the first place? Typical. The world is moving. OK, we're going back to your. Your plant, your factories. You have you had these 23 shops, didn't you? Uhm? And then what happened? You decided that you ought to go bigger or haha, what was the sequence of you coming to a building this factory here in 1963? Nice, it was nothing to do with the shops we we. Is it conscious decision that we would? Whole sign in. The profile with the supermarkets. And the two didn't mix. So. With all down efforts were better looking after. Supermarket customers trying to run. Running down the shore. And then expanded the. Not only do they have as well, but again. Further, processing size that pork pies and sausages. Tell me doing that, we bought Ruskington. It was amazing. How was it that that came onto the market? I think it was in liquidation. We do little skating foods. And they had just been doing bacon. Had they not what it was called? Well, I think sausages. Rundown we took that. Learn to run them back, then was folding back here with my brother managed? It got so bad that we got no room. To expand anything we was, we just couldn't move, so it was a big, conscious decision then too. To build this factory. So we built that move down to Spaulding when you couldn't get the big lorries into Spaulding and. So. Another reason for building her music. OK, let's again take that. One by one you say that it was a conscious decision to expand the supermarket trade at the expense of the retail trade. So you saw this coming at the end of the 50s. The word. Expensive the retail trade. Right? We always proud of myself as I'm looking after the corner shop with our values. And we still have. Same demands all over the country. Going to corner shops and we've been very reluctant to drop a small retail customers. Many unknown big noil change over many years. When it came to wanting the volume. We had to look too. Now. Logic customers. So. Now in the paper bowls and not that it was a challenge. You like a challenge, don't you? Start radio. Expenses. Something called. It's quite a long time. How did you get your first contract with Marks and Spencers? Who's showing them their hand raised pork pies? Wonderful. What happened? Did you just say? Red hand raised. When we got. Does she? Sold and raised pies being made there always time looking for craft rather than automation and so forth. So that was the start of that. The fact that we now making a lot of ham for the music. Another story. Cool and \*\*\*\* miss you tell me earlier again off the tape that you now have a dedicated or you're going to have a dedicated factory for. The ham, is that right? You have no, I'm sorry it's nowhere to park cars there. Wait for. Dan Coats with. Just ambushed with crazy volume. Alien half affected. Good, OK so. I'm just interested that the. The the supermarkets, perhaps it's. An element of your vision for the future, but the supermarkets were already becoming so important at the end of the 50s. But that you took this decision to go down that route. Yes, I think you've got that song around me. I think it's the end of the 60s, so it was after you built this. Abattoir and marching band. But we could do in those days and. We could start a supermarket from my vans right? I see right there wasn't. We didn't have to do central distribution. Rush. It was a different. Go in the water but nothing. And now like it is today, yes, well, that's that's much more. Obvious from now, you've explained it because I I hadn't thought of it. In terms of that volume, until the 60s, a lot changed in the 60s, didn't it? Yes well, yes. 96 is 9:50. But it's not. Nothing's changes that she has done. In the last. 10 or 15 years ago. Reading is. Well, we will come on to that, certainly. So will you describe the GNU Slaughter House that you built here? This will

be calling it an abattoir now probably yes. That's interesting because. Period we previously been talking about. We always do slaughter houses. We then. Prepare now where we built this. Just got them as average ones. And now today we describe them as meat plant. Call zips. Offensive to answer. So when I'm. Failed. Massive. My marriage I had them. Block walls so the animals couldn't. Between rails. Then we had a long cattle race for the Castle to go. Do the stone in pain. Electric hoist electric soul. I ate. Building hanging hole with new routing. Selling to get the air blowing around that stuff before it went into. A fridge? And it just gave me room for. Expansion. ABC license online. We didn't. Too much. Images. You had a license, even when, when did you get your EC license then? 68 and so dumb. This. So what numbers is this abattoir designed to cope with? London. Everything on battle. We get the volume and then we put a face. More on this I would be. The reason it wasn't designed to kill 300 pigs are now. Yeah, we keep adding on. Killer accommodation pounding holes. Sing for two. Priest account unfortunately. The way the industry is going. And looking more single specie abattoirs. Smart. Stop killing babies. She. Just do pigs only. Something. But I'm not the flavor of the month. How much was the reason too many left to do all three species? Castle. Asian short OK, everything getting big. I'm. Woman alive evening out factors are thought against too much. Automation because I'm. Prefer to get. Quality. Inline monkey rather than automation of their products. Stronger. Labor costs have made sort of niche market. I don't want to be the biggest sausage maker in English. Oh God. Best good good. But here I mean when you opened in. 1963 did you have a day for cattle or do you have a separate section for cattle from pigs and sheep? Or how does it work? When I open it in 63. I want it separate area for cattle, sheep and one for. Thanks, but all within the same hole, right? Add. Play again. Thank you. This way it is to take things out. So we had to build a new pickle. Top down the way. Sheep. Cancel. Who? Did you design that factory personally or did you have an engineer or architect to design? We had an architect. To to do that, you have to put your own ideas. Socialized in in designing, yes. In music. It was going good. From London, what was his name? Great gas. Contact we used to have new partners. Reviews. Do you can have a house builder build? Hope is different. Scheduled. Why is it so important? Or did they vet think anyway to keep the pigs separate? Well, environment. In their sleep. Damn. They don't want any cross contamination. Between you. Lamson. That little right together on it. Yes, I know. We don't kill them at the same time and. What you have different days for different but for the lamb in the capital? First thing in the morning and then the cattle afterwards. Different days but. So you see that the Council again to come in at one end. Through a narrow passage race, and then what happens? Running pain in there. Is it the same one that takes over? Yes, right? Throws it out because she left it up bleeding. We used to play them on the ground whereas now we played them in the air over bleeding shop. And what happens to that blood? Blood goes into. A tent. Quarantine for pet food. And the waste from the. We have to pay to have everything taken away now. Getting on. Big tanker every day. Right? And then. You do far more burning out and so on on the premises. Is that correct? Yes. So how, how long will it hang for before you do the burning out? Take Me Out next day. Cheap we don't download it. The sheep me down. I've got some. Be found. Now we started retail packing in. Most. Pulled over there today. Pack. Whether it will eventually translate left there with them. Yes, yes. And you supplies do they come from the markets? Where do they come from? So the animals now. Cancel. Still many come from markets because we can choose. What we want. Big sale. Eczema? All over the country. Pig farmers well. Yes. Read. Cancel. Why do you only got 1? Doing very well at the moment. So when. Result. My teams are the pig industry, but. Capital. They were wrong in not putting it in what we're doing rather than bone. But we got there. No, no good sales taking the progeny to bacon. Wait? It's interesting now. Well, you say that you say that it's not doing well now, but whether we will be doing well or I mean at one time you obviously thought it was going to be. Things have always been up and down that have been down for quite a long time. Too long now. But it's a world market, not the UK market. Oh, I see. I see OK, but is that not the same now with lamb and cattle as well? All over the world. Because we're eating less of it. No, I think it's probably. Overproduction right. But that's very interesting. We'll come, we'll certainly come back to that. OK, so you get your capital from the market and the pigs you buy from the farmers and the lamps. Where'd you get them from some private some markets? Pending. Size and so forth. We used to get a lot bigger shape. Smaller. Right? Sue you. Buyers who go off to market. It's obviously their job to keep the factory full of. Full to kill is that right, yes. Right? And then. We go on to the next stage, which is still. Whether it's going to enter the supermarkets as a. A product in its own right, or whether you're going to make it up into your pies and sausages and so forth, yes. Well, yes, I mean it. Whatever specie animal, it is, a certain cuts it up for the retail trade and certain cuts are for further processing in the manufacturing industry, right? Now what is changed there from your time immediately after the war? Nothing's changed. Add more New Zealand and then we do today. Pygmy shoulders manufacture the loins and legs went to. Raytown saved it, although some of the small pigs went home too. To the shops. Any? Who's going? I feel how hard courses FIFA is. It's also. Hold down now. Live with that. I don't think you can. And then. Automate from abroad or from island, which typical cheaper? As in balancing effect only. UK trade. Do you still get some? I mean, you still get Irish beef coming over, don't you? Yes. Right? And does that keep the prices? Doesn't? What effect does that have on the prices? Willing. Coming school. Manchester. Really is I said so. Gotta send a book so there's nobody to eat it. Hanging. They rely on exporting. One time. You should come this polling station on cattle trucks straight from Holyhead from Ireland. Yes. Captainship after the war. Did you ever get so you didn't ever get cattle from America or any anywhere else or just from Ireland? Yes. Norton. Saying that. Then we started after man, who's down combined Continental made for breeding from. Jim. And

what do you think about this please? Paper. The fact that cost more. Crossed all right? I mean, I spoke earlier on about the Lincoln red, yes? Get fat on the graph, say without anything. It wouldn't get paint on the grass without giving it a lot of extra feed across it. With the Lincoln raised or her, if you got improved, the confirmation made it lean. You got the best of both worlds. So. On the crossing point of view, I think the Continentals. I've been doing a lot of good. And you like the taste of it? Belina meat, do you? Coke grytten everything is related. Difference in flavor base? Scottish. Good for you, good for you. So when we're talking about these local breeds. What about the thorny question of BSE, what it's been fed on? What about the thorny question? I think it's been a media. Hype. Blown up out of all proportion. Obviously that has been. Can you season? Everything is not over yet people. Still going to have to lose. I don't believe that this country is the only country with it. Zoom out. We've never had one case here. But then. Same with being clever, but we only kill. Playing cattle we don't kill cows. So that. Makes a difference, so we don't often buy from. The dairy. But you do occasionally buy from dairy dairy. Do not very often. Waiting here. He's going to leave it soon. For a long time. So it must have affected your business, didn't it? Nobody escapes. How did it affect you? It hasn't been a deterrent on the people. Eating meat. We don't make as many state and candy pies now that we used it. Night. Things like that it is made. Public very nervous and uncertain. Whatever you do. Comma. Damage in affecting television put in the same group or cow on hundreds of times as it's been wicked. What is? Also wear bandaids. This country doesn't seem to want to support a livestock industry at all. Shawna decimated brothers support in English. We have good export market going on all three species. Yes. So were you able to change from doing your steak and kidney pies? And your abattoir throughput to be able to fill that with other killing more pigs. Play the big part in. You might do. Most of the time. Something that hasn't got vaping or use and. OK. Face. Cornish pasty more of other things in the state and kidney pie. That's not the flavor of the month at the moment. We can get some confidence back. I'm not surprisingly English. Come on, you don't know what next is gonna break out with the media. Something working. Around the door. He wants to get. Something they give him worrying as it quite so over the top, don't they? Trolling? People say, oh, how do you get home with it? Supermarket regulations, supermarket regulations and supermarkets are terrified of the media. So whatever the law is, that doesn't matter. They gotta be better than that because the media will destroy them. Media is in charge of the standard apology. I'm getting hold of one of the major said try and destroy them. They will try their best. Look at this Scottish singing, yet we're all suffering in England. Alignment started show. Just made everybody so far when I was going to come on to that. I mean how? How is the E coli affected you in your shops? We just means update rules and regulations of time. Further we becoming a nanny state. Further regulations is also. Public. Lack of confidence in food and with. And don't forget the date. Vegetarians, at the same time I've been given a bigger platform all the time. What do you think about the vegetarian? Facebook. Define. Being anemic is their problem. But I have no right to throw everything down. Other people. That's what I think about it. We both gotta write it. Yes, I quite agree.

## **Appendix 6: Evidence of coding and framework model evidence**

### **Interview 1:**

<b>Data showing evidence</b>	<b>First coding cycle</b>	<b>Second coding cycle</b>
“One of the largest in regions producing meat”	Size of industry	Risen to prominence
“Big chunk of export commodity”	Size of industry	Risen to prominence
“Not a lot of added value”	The beef produced	-
“Beginning of the 1900’s many of the English traders went there and set up farms, ranches and slaughterhouse’s for processing”	Presence of English traders	Economics
“They bought some rail systems and stuff”	English Investments	Economics
“I think size of farm and land. So were talking also about flat areas”	Size of industry	Environmental
“Land is extremely flat, it means it’s no good for agriculture, however its very good for livestock”	Quality of land	Environmental
“Very fertile, however this is more on Argentine side”	Argentine land quality	Environmental
“Brazilian side have to be very careful as there is ancient desert beneath the soil”	Brazil land quality	Environmental
“Cattle was the first type of agricultural production in terms of livestock production”	Introduction of livestock	Risen to prominence
“Major markets, one was Buenos Aires”	Location of markets	-
“During the process of walking the cattle to the market, they would slaughter cut the cattle”	How the beef industry in South America evolved	Risen to prominence
“And from this they industrialized the dry meats, so the jerk beef”	Industrialized dry meats – jerk beef industry	Risen to prominence
“Late 1800’s refrigeration was very rare”	When technology came into practice- refrigeration	Technology
“Invested in a lot of technology which allowed meat to be actually sent back to Europe”	Technology investments and exports	Technology
“Future is bright because it’s a commodity product”	Thoughts about the future of South America beef industry	Future thoughts
“I see them starting to target markets in Africa and China”	Future thoughts regarding South America	Future thoughts
“Able to achieve slaughter weight using free range grass and cattle being out all year”	How they produce beef, - grass fed, cattle being out all year round	Environment
“Here people bring them inside during winter”	UK beef industry	Environment
“They literally just have the perfect climate and environment”	South American climate and environment	Environment
“Very little labour costs associated with their beef, they can simply calf on the field and maybe once a month the farmer will go round and check everything is ok”	Cost of producing beef	Economics

“In the UK, we are much closer to the cattle, and one may even say we are too close to these cattle”	UK relationship with beef production	Production systems
“They are big on their genetics, this is something they are proud of”	Technology – genetics	Technology
“You’re talking about hundreds there in terms of herd size”	South American herd size	Risen to prominence
“They aren’t typically big in terms of adding value to the beef there, whereas here in the UK we are continuously trying to add value to our beef”	Adding value to beef	-
“It’s a culture where people are always eating meat anyway. That is just the culture”	Culture influences	Social
“We in the UK are constantly adding costs and other costs you know labour costs, and that’s where we differ”	Cost of producing beef	Economics
“I think price difference is another element, just the way consumers see the price of beef”	Cost of beef products	Economics
“Small butcher shops, I’d say it’s quite similar here in the UK”	Small family butcher shops	-
“At the moment we have this trend of convenience”	Influence of trends	Social
“I’d say they just have the perfect climate and the environment there”	South America climate and environment	Environment
“Also I don’t think people are bothered about meat here, there simply not as into it as South America”	Consumers perception of meat (UK and South America)	-
“Beef is normally associated with being expensive and hard to cook maybe”	Cost influence	Economics
“They just have the perfect climate to produce beef, but if anything the UK is over-processing their beef”	South American climate and environment	Environment

#### Interview 2:

<b>Data showing evidence</b>	<b>Descriptive coding (concepts)</b>	<b>Category</b>
“Brazil and Uruguay have risen to prominence in terms of beef production and export market”	Brazil and Uruguay rising to prominence	Risen to prominence
“Uruguay wanted their beef to just be as sustainable and grass fed”	Uruguay beef industry	Environmental
“Looked at marbling and eating quality”	Quality of Uruguay beef	-
“Uruguay cannot compete with Brazil and Argentina on volume”	Competition between South American countries	Political
“Uruguay invested a lot into grassland beef production systems whilst moving away from feed lot production”	Investment into the Uruguay beef industry	Economics
“Brazil Is known to always have bad press regarding the Amazon”	The media regarding the Amazon	Social

“Brazil want a more sustainable beef production”	Sustainable production	Environment
“The very much produce high value beef and I actually think I’d be very keen for the UK to say look we can’t complete on volume, but we can compete on quality”	The value of beef	-
“I think Brazil is a country in which they have lots of resources”	Brazil resources	Economics
“They certainly finish animals a lot quicker compared to us here in the UK”	The speed of producing beef in Brazil	Production systems
“South America have everything they need, they have the perfect climate, they have the perfect environment”	South America climate and environment	Environment
“Herd sizes are much larger”	Herd size	Risen to prominence
“Beef is considered to be a domestic product over there, you know, people have grown up on beef, they consume so much more beef than what we do here”	Culture influence	Social
“Within the UK, we can grow grass. We’ve got fantastic breeds of animal which have a high level of marbling, therefore will deliver high quality meat product and we start to produce that and move away from the confinements”	UK beef industry quality and positives	Environment
“If we go into thinking about a sustainable future in the role of livestock products, we need to consume less of a higher quality”	Sustainable beef production	Environment
“Farmers that are connected with local butchers have got a huge potential and a real great future because that is when the farmer is working with their butcher to essentially say, OK what are you looking for and then they work together producing something special. For sustainability of the red meat sector within the UK particularly, there’s got to be an awful, more lot more of those connections”	Future potential	Future
“Brazil has major challenges in terms of repositioning it’s red meat sector”	Challenges within Brazil beef industry	Political
“Brazil have had huge economic issues and requirements, all to ensure they are as sustainable as possible, and still have loads of work in order to get their beef industry as sustainable as they can”	Challenges within Brazil beef industry – economics and various requirements	Economic
“I suppose the real challenge for the whole red meat sectors is the fact that globally, we need to, in	Cultural influence	Social

many parts of the world eat less meat”		
“In the UK we need to be careful in the way we produce beef, we really should value our systems, but improve on them”	UK beef industry	Future
“I think South America will continually look for better markets”	Future of South America beef industry	Future
“They will continue to develop as other countries try and catch up”	Future of South America beef industry	Future
“South America really need to realize there is a potential for a premium market”	Future of South America beef industry	Future
“I think Brazil, will also carry on producing high volume of beef because there really is still a big demand for it”	Future of Brazil beef industry	Future
“Asia want more beef and Africa is getting richer because of its resource in its infrastructure”	Beef demand	Risen to prominence
“South America demand and livestock products will continue to increase, and there's many parts of the world that just need more livestock products for health, particularly parts of Africa”	Future of South America beef industry	Future
“Educate individuals, producers, countries, politicians about what sustainable pathway”	Education regarding sustainable pathway	Social

### Interview 3:

<b>Data showing evidence</b>	<b>Descriptive coding (concepts)</b>	<b>Category</b>
“South America is crazy, being one of the biggest beef producing countries”	Size of industry	Risen to prominence
“Brazil is still limited, in terms of the meat they are producing”	Brazil beef industry	Risen to prominence
“Argentina is that we are experiencing deep economic and social issues”	Economic and social influences	Economics
“consumption levels of beef in Argentina has decreased in recent years”	Consumption levels	Social
“slaughterhouses in Argentina specifically are very well designed in order to process beef and for exporting beef”	Technology	Technology
“demand for our beef”	Demand for beef	Risen to prominence
“Currently, the domestic markets are down in terms of price we are getting”	Cultural influence	Social
“labour costs are relatively low”	Costs of producing	Economical
“current domestic markets are depressed”	State of current markets	Social
“there is no consistency within the beef companies meaning things constantly change”	State of industry South America	Production systems
“slaughterhouses are the ones setting the prices, they have so	Power within the industry	Production systems

much power within the supply chain”		
“said companies would never negotiate with slaughterhouses, as they would always set the scene, it would not be normal to negotiate with slaughterhouses. Generally speaking the price is not negotiable”	Power within the industry	Production systems
“biggest challenge is to have a more coordinated supply chain”	Recommendation	Future
“we actually don’t know too much about their consumer demand”	Consumer demand	Social
“facing some economic problems”	Economic influences	Economic
“I don’t think the slaughterhouses care much about consumers want or even consume”	Personal experience	-
“beef is definitely considered as a commodity product”	Cultural influence	Social
“people in Brazil, Uruguay and Argentina have lived off beef, they appreciate their beef and don’t know anything different, it’s simply a commodity product.”	Cultural influence and consumption	Social
“challenge that they typically face is that they do struggle to add value to products, compared to the UK”	Adding value to products	Production systems
“UK beef would always have better packaging, better information, and just better packaging technology”	Technology within the UK beef industry	technology
“challenge is all the exports, markets are getting harder to find”	Export markets	Future
“countries are getting richer”	Economic influences	Future
“known to be very reliable and always deliver on time”	South America beef industry	Risen to prominence
“The cost of beef production in beef generally is very low when compared to the UK”	Production costs of beef in South America	Economics
“do everything on a much larger scale to the UK, and when everything is done on a much larger scale it brings cost down.”	Size of industry	Risen to prominence
“the cattle can stay outside all year round”	Producing beef in South America	Environment
“herd size so much larger compared to the UK”	Herd size	Risen to prominence
“more low maintenance too”	Producing beef in South America	Environment + production systems
“South America can produce beef cheaper, we instantly get a better price for the product.”	Cost of producing beef in South America	Economics
“South American beef should move forward to a more demand driven supply and maybe move away from the commodity driven supply”	Recommendation	Future

“a lot of English investments, especially within Argentina”	English investments – relating to Argentina	Economics
“Brazil, they have had good developments in technology, they are ahead of the game, with good technology systems in slaughterhouses”	Technology developments – in relation to Brazil	technology
“competitive industry”	The beef industry – general comment	Social
“lucky in terms of environment and climate”	South America climate and environment	Environment
“the level of beef production will only sustain”	Future of beef industry in South America	future
“don’t think it will never grow higher.”	Future of beef industry in South America	Future
“in many Southeast Asia countries and African countries, it could potentially grow slightly, but not really in south American countries”	Future of beef industry in South America	Future
“I think the exports to China will decrease”	Future of beef industry in South America	future
“consumer behaviour will have been changed and the way people purchase beef will change”	Consumer behaviour	Social
“economics and the politics impact a lot on these sort of industries”	Economic influence Social influence	Economic
“south American countries produce beef for their domestic markets”	Size of industry in South America for domestic market	Social
“in the UK, we have different culture, and trends that influence the way we eat. For example veganism and flexitarians etc and meat free Mondays.”	Cultural influences	Social
“South America consumes hell of a lot more beef than the UK”	Consumption of beef in South America	Social

#### Interview 4:

<b>Data showing evidence</b>	<b>Descriptive coding (concepts)</b>	<b>Category</b>
“my history with south America started in 1999, where I worked for a meat trade, looking for third country trading.”	Third country trading	
“Brazilian market was still a domestic market”	Cultural influence – domestic market	Social
“the UK when we had too much beef and would never be able to consume it all, it would be sent to Brazil”	Systems	Production systems
“cattle price was set, which meant if the price dropped under 80% of the price, it would be sent to the European commission. This was in place, to support cattle farmers, you know, it was a good thing”	Support available to farmers	Political
“Around 1995, very soon we have an export ban on Britain, meaning we couldn’t export British beef outside the UK”	Exporting within the beef industry	Risen to prominence

“Brazilian market was still very much a domestic market”	Cultural influences	Social
“domestic market was particularly what was the driver of the market which wasn’t particularly large on exporting or even a big producer of beef”	Cultural influences	Social
“the 90’s, we had far too much beef in the European Union, and we weren't able to consume it all”	Beef consumption trends History	Social
“In this country (England), I don't think rationing of beef stopped until 1952”	History	Risen to prominence
“There was lots of owner operators, a lot of family businesses, and not too many groups or large businesses”	Brazil beef industry	Economics
“difficulty has been more in relation to sustainability issues, modern slavery issues and reputational issues”	Challenges within the South American beef industry	Environmental
“deforestation is another problem, you know I was really surprised that Brazil in particular has a deforestation perspective. This is because I see Brazil as a very green country”	Challenges within the beef industry in relation to Brazil	Environmental
“I really recognise and saw first-hand how I would consider Brazil to be quite green in certain areas. And I think that's very, very, very poorly known”	Brazil beef industry	Environmental
“shipped on time, all the time, you know, there were the ones that you could rely on”	Beef industry in Uruguay	Risen to prominence
“Then Argentina would probably be described as a once great exporter of beef”	Beef industry in Argentina	Risen to prominence
“Very much a domestic product”	Cultural influence	Social
“people was very much used to eating and consuming a lot of beef, it was in their culture”	Cultural influence	Social
“main livestock market was located in Buenos Aires, they would have upwards of 30,000 cattle sold on a daily basis.”	Location of markets	Production systems
“certainly have the perfect climate”	Environment and climate	Environment
“tend to focus more on quality, they really have focused on what they can do well, and built upon their strengths”	Beef industry in Uruguay	Production systems
“I'm a great believer in that there's great beef in every country. And there's rubbish beef in every country”	General thoughts and opinions	-
“they were very dedicated”	Beef industry in Uruguay	-
“Land was slowly transforming, and most beef production in Brazil, was down south, with very good breeding and good grass production too, so that helped too”	Beef industry in Brazil	Environment

“lot of involvement In terms of changing the grassland of Brazil, this allowed beef to be produced in more northern areas of Brazil”	Investments and developments in Brazil	Environment
“they had difficulty in terms of export trade and issues with being landlocked”	In relation to Paraguay	Risen to prominence
“but our hosts were very, very reluctant to show anything on the feedlots on the basis of the fact that they feel that feedlot produce beef is compromising the quality, the unique quality of the traditional Argentinian beef”	In relation to Argentina	Production systems
“efficient thing to do was to move to feedlots because they got plenty of crops to feed them”	Beef industry in Argentina	Production systems
“within Argentina, they all thought that you know, beef should always be fed on grass, and exclusively grass”	Beef industry in Argentina	Production systems
“future is very bright for South America as a whole, the beef industries are thriving there”	Future of South America beef industry	future
“influence and change the way people purchase beef”	Consumer behaviour	Social
“conscious regarding what their eating and their impact on one’s health”	Consumer behaviour	Social
“I think they will be starting to look for new markets”	Future of beef industry for South America	Future
“there is certainly a future for South American beef, that’s for sure”	Future of beef industry for South America	Future
“I think yes we could potentially learn and take the good things from South America and add them into our beef industries here in the UK”	Learnings from South America beef industry	Future
“much larger scale”	Scale of production	Risen to prominence
“very lucky in terms of the weather and their climate, it really is perfect for producing good beef”	Environment and climate	Environment
“much more distanced to their livestock, where here in the UK, we are constantly stepping in, so maybe that could be one recommendation”	Relationship with livestock	Production systems
“the norm would be to check the fields like one or twice a month”	South America beef industry	Production systems
“I think here in the UK we do over process our foods”	UK beef industry	Production systems
“they always keep their beef cuts simple, and does not process as much as we do here in the UK”	South America beef industry	Production systems
“they have the perfect conditions for producing beef”	Environment and climate	Environment

#### Interview 5:

Data showing evidence	Descriptive coding (concepts)	Category
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“Major cattle production happens in Brazil, Argentina, Paraguay and Uruguay. And here in Brazil we have similar conditions between the four countries”	Size of industry Climate and environment	Environment
“correct conditions to produce beef and quality beef”	Climate and environment	Environment
“We can produce grass during the whole year, and I think that’s why we’re doing so well.”	Climate and environment	Environment
“feed lot industry is growing fast”	South American beef industry	Production systems
“We have this cultural thing where cattle is part of who we are and what we do”	Cultural Influence	Social
“your cattle are in much better shape than ours, you look after them and provide them with more than enough over the winters, where ours are outside all the time”	Climate and environment	Environment
“very viable for us”	Cost effective	Economics
“herd sizes here are also much larger than the UK”	Herd size	Production systems
“The main breed of cattle we breed is the Bos Indicus, that originally came from India.”	Genetics	Production systems
“grown so big because of the export markets, they are huge, they export a lot to China”	Export of beef	Social
“domestic product”	Cultural influences	Social
“it’s seen as expensive meat in the UK”	UK beef industry	Economics
“because it’s cheap”	South American beef industry	Economics
“technology has developed huge amounts over the years”	Technological developments	technology
“the climate and environment is always on our sides”	Climate and environment	Environmental
“not much involvement with the cattle”	Production systems	Production systems
“A lot of farmers like me produce beef part time, because they don’t require huge amounts of work,”	Production systems	Production systems
“China have a huge appetite for not only beef, but also chicken and pork”	Consumption trends	Social
“since the African swine fever outbreak, they are importing a lot from South America, they are basically importing everything we produce at the moment”	Animal diseases	Social
“economy is currently being maintained”	Economy	Economics
“been lots of investments and development in urban areas, they have changed dramatically which has boosted the economy here”	Investments in urban areas	Economics
“Brazil’s beef industry a bright future which is excellent news”	Future of Brazil beef industry	Future
“prices are always fluctuating”	Economic influence	Economics

“If the prices of feed go up, then the price of beef instantly goes up too”	Economic influence	Economics
“Politics, is huge and this always effects the industry”	Political influence	political
“countries really are slowly getting richer and richer”	Economic influence	Economics
“in South America, it’s a domestic product, people doesn’t know any different, everyone eats and consumes beef all the time.”	Cultural influences	Social
“new technology being developed to aid the industry and make us more productive”	Technological developments	Technology
“more investments will happen”	Future of South American beef	future
“both the UK and South America could do is focus more on biotechnology”	Future of beef industry	Future
“issue of technology is people often argue whether it is safe or not”	Technological developments	technology
“in the UK is that the costs are much higher, people here work for cheaper, traditionally people who worked in the countryside got paid very little, and the wages are still little”	UK beef industry	Economics
“economic situation of the country affects”	Economic influence	Economics
“know every country is slowly getting richer and richer and that means more to spend on food. So I do think that the future is looking bright”	Economic influence	Economics
“I think in terms of size it will stay as it is but perhaps grow steady but not too much”	Size of industry	Risen to prominence
“market is extremely competitive and everyone is constantly fighting for more business”	The beef industry – general comment	Social
“uncertainty around with the pandemic, who knows what will happen”	Covid-19 influence	Social
“Due to beef being embedded within culture here in South America, it will always be a big thing”	Cultural influence	Social
“technology being able to develop the industry”	Technological developments	Technology
“much better investments than us so they will be able to gain better technology development”	In relation to the UK	Economics
“highly competitive market”	The beef industry – general comment	Environmental
“One of our biggest challenges is that this Chinese dependence, we depend on them so much for them to take our beef”	South America beef industry challenges	political
“another challenge here is the government, they have a lot of power in today’s world and can stop exports and imports just like	South America beef industry challenges	political

that, things like export tax and just the general costs of exporting goods”		
“slowly the costs are increasing slightly, which means we will have to charge more for our beef in order to make the same money”	Economic influences	Economics
“In Paraguay nearby we have lots of political insecurity”	Political influences	political
“in Argentina they have the same issues, they have huge economic crisis”	Economic influences	Economics
“the press can also be considered and a challenge that the industry constantly have to battle with, you know we get a lot of bad press here in Brazil, saying we are killing the Amazon”	Media influences	Social

#### Interview 6:

<b>Data showing evidence</b>	<b>Descriptive coding (concepts)</b>	<b>Category</b>
<i>“beef genetics, which I am very passionate about”</i>	Technological developments	Technology
<i>“I have been heavily involved within beef, especially in Brazil”</i>	Personal experience	Social
<i>“Brazil is an amazing country if you ever get a chance to visit you really should”</i>	Personal experience	Social
<i>“What shocked me was the vast amount of English investments, there really was a huge amount of English money, and also English people who had actually moved there”</i>	English Investments	Economics
<i>“it was a very good place if you wanted to make good money producing beef”</i>	Brazil beef industry	Economics
<i>“the climate and the environment is just good, everything is better, in a way they do have the perfect climate”</i>	Climate influence	Social
<i>“domestic market, you know it’s in the South American’s blood, they live off beef”</i>	Cultural influence	Social
<i>“they really do eat so much more beef than us. Its crazy the amount of beef they eat”</i>	Consumption trends	Social
<i>“Additional factors are thigs like, export taxes and subsidies, they affect the industry a lot”</i>	Political influence	political
<i>“government in these countries have so much power”</i>	Political influence	political
<i>“everyone eats beef in South America”</i>	Cultural influence	Social
<i>“South America produces loads and loads of beef. It’s just a fact.”</i>	Social influence	Social
<i>“never really see veganism or vegetarians there, whereas in UK there’s a lot, and lots of campaigns that I don’t know</i>	Social influence	Social

<i>perhaps ruin the potential beef that could be sold</i>		
<i>“China buy a hell of a lot of beef, you know without china, where would we be”</i>	Beef trends	Social Risen to prominence
<i>“consumers are wanting to know more about their food, and that’s in Brazil and additionally in the UK”</i>	Education	Social
<i>“Argentiniens actually are slightly embarrassed to say they use them, they believe it affects the quality of the beef which is crazy I think”</i>	Producing beef	Production systems
<i>“China takes a lot a lot of beef, and I think it really would affect the Chinese stop purchasing beef, you know were in a way dependant on them”</i>	How south America has developed	Risen to prominence
<i>“climate, you know south America have the perfect climate”</i>	Climate	Environmental
<i>“South America do everything on a much larger scale”</i>	Size of industry	Risen to prominence
<i>“herd sizes and the size of farms”</i>	Size of herds	Risen to prominence
<i>“beef production in south America seems much more natural”</i>	Beef industry in south America	Environmental
<i>“I’m a big believer in livestock living a life that is as natural as possible, you know they should always be out on nice grass”</i>	How they produce beef	Production systems Environmental
<i>“that beef production in south America could be more cost effective”</i>	Cost of production	Economics
<i>“everything seems to be much cheaper, especially when compared to the UK”</i>	Cost of beef	Economics
<i>“labour costs would be much lower, and lower costs means cheaper beef.”</i>	Working/labour	Economics
<i>“definitely think that the UK beef production can learn lots from South America, but also south America could learn a lot from the UK”</i>	Learnings for the UK beef industry	Future
<i>“technological developments, I think it will become more of a thing in the future”</i>	technology	technology
<i>“but I think the UK could potentially learn that you don’t have to do everything perfect and all this, its ok not to be the top dog, but what you can do is always improve”</i>	Learnings for the UK beef industry	Future
<i>“Education perhaps is another thing the UK could learn”</i>	education	Social
<i>“look at finished product here in the UK, our beef is typically processed more, it might be a controversial thought, but that’s my opinion”</i>	Processing beef	Production systems

<i>“we as a nation here process and work our beef too much”</i>	Production systems	Production systems
<i>“so I do think it’s essential to reduce the amount we process food”</i>	Production systems	Production systems
<i>“is competition within the industry, it’s so hard, everyone is competing for the same businesses”</i>	Competition	Social
<i>“but price is another thing, your customers will simply buy the cheapest, they will not budge”</i>	Prices of beef	Economics
<i>“power within the supply chain. People within the supply chain have so much power, for example, the main people that have the most power is the slaughterhouses”</i>	Power within supply chain	Social
<i>“Exporting good is a challenge with the rules and regulations changing all the time, it’s very hard to keep up, I hear a lot within my business talking about how complicated it is to export”</i>	Exports	Risen to prominence
<i>“I think the future is bright, I don’t think much will change in terms of the amount they produce, they will continue to maintain”</i>	Future	Future
<i>“technological development will come into the future”</i>	technology	technology
<i>“maybe even some English investments”</i>	Investments – English	Economics
<i>“perhaps the trends business could be more predominant in south America countries, I do think generally, south America does follow our trends here”</i>	Future of beef industry	Future
<i>“future Is looking good at the moment, there producing at a steady state I think and doing generally well”</i>	Future of south America	Future
<i>“genetics, erm I have lots and lots of experience within genetics and actually that’s what my business currently is”</i>	biotechnology	technology
<i>“genetics is going to be huge, I’m telling you, it will grow and grow, it already is a huge business in Brazil”</i>	biotechnology	Technology

#### Interview 7:

Data showing evidence	Descriptive coding (concepts)	Category
<i>“technology has changed quite a lot Morgan. Especially processing technology and refrigeration and storage techniques”</i>	Technological developments	Technology
<i>“20 years ago would have all been frozen”</i>	Development of South American beef industry	technology

<i>“I think the industry grew, mainly from the retailers, they did a lot of work promoting beef”</i>	Development of South American beef industry	Risen to prominence
<i>“before my time the hygiene was so bad, people in the slaughterhouses would be smoking on the line and the sawdust on the floor”</i>	South American beef industry	technology
<i>“I would say in the UK, during my time south America was ahead in terms on slaughtering, they were very good, for example the animals got to have a full stomach, you know, you've got to feed them on the track and they've got to arrive in the yards.”</i>	Personal experience	Social
<i>“they claim cattle going in good hygiene standards in the factories, and good investments and chain technology in that process really did help.”</i>	Hygiene standards in the factories. Investments	Economics
<i>“Brazil have really had a terrible time during this pandemic situation”</i>	Challenges within industry In relation to Brazil	Social
<i>“I think the main challenge we face Is the relationship with the farmers and additionally the price we pay for the beef versus a competitor paying for it and getting enough of the right product at the right price”</i>	Challenges within South American beef industry	Social/political
<i>“Brazil are currently in a bit of a lower production phase, it's had very high rates of production, and I think this is down in the recent five years or so, as it been the emergence of Asia as a buyer of beef”</i>	Beef industry in relation to Brazil	Production systems
<i>“China’s demand for been has gone from low ish to extremely high due to their own pork population, which is pretty well documented”</i>	Exporting trends	Risen to prominence
<i>“biggest challenge probably in Brazil right now is enough critical mass of livestock to keep the factory running economically and generating”</i>	Challenges within industry In relation to Brazil	Social
<i>“But they say that there's a supply dynamic challenges in Brazil right now too, there's been a big, a big feature there”</i>	Challenges within industry In relation to Brazil	Social
<i>“They have some pressures as there’s still very good demand in Asia and North America.”</i>	Challenges within industry In relation to Brazil	Social
<i>“Probably for Brazil, it also has a challenge around the perception of Brazil because it tends to get tired. The Amazon region is very topical. And beef production is highly muted within that whole beef and soy. And so</i>	Sustainability challenges	Environmental

<i>there is some sustainability challenges”</i>		
<i>“And yet again we constantly have bad media stories about us. You know, the NGOs, like Greenpeace and others that will chip away at that and focus on a few of the smaller parts, but ignore all the good work”</i>	Media influence	Social
<i>“This is new blockchain technology that’s actually just coming into force around trade and traceability in Brazil”</i>	Future of South American beef industry	Future

#### Interview 8:

<b>Data showing evidence</b>	<b>Descriptive coding (concepts)</b>	<b>Category</b>
<i>“they all started through a lot of English investment particularly in Argentina”</i>	English investments	Economics
<i>“investments were used to develop a lot of the distribution services, which obviously helped the beef industry dramatically.”</i>	Investments	Economics
<i>“south America was all about jerk beef, erm dried beef if you know what I mean. And then after that along came the refrigeration and it all took off”</i>	Technological developments	technology
<i>“it’s very much a domestic market over there, it’s part of their culture”</i>	Cultural influence	Social
<i>“consuming a lot of beef anyway”</i>	Consumption of beef	Social
<i>“south Americans have so much appreciation towards the beef they produce”</i>	South American beef industry	Social
<i>“I think politics is a big thing, a lot of policies and various arguments shape how the industry is ran, especially you know south America export so much of their beef, and then you have to consider stuff such as export taxes, and various subsites”</i>	Political influence	Political
<i>“Climate is another thing that has helped the industry over the years, I do personally think they have the perfect environment for producing beef”</i>	Climate	Environment
<i>“being able to produce all year round grass fed beef on a huge scale”</i>	Climate	Environment
<i>“climate is huge, its just made for producing beef in south America, Its amazing, and the cattle eat grass throughout the year, its perfect conditions”</i>	Climate	Environment
<i>“Domestic market too, ive mentioned it earlier, but they are very much influenced by culture, whereas in the UK, were</i>	Cultural influence	Social

<i>considered to be much more trendy in a way”</i>		
<i>“we adopt quicker to trends and south American countries seem to adopt our trends later on down the line”</i>	Industry trends	Social
<i>“the way farmers look after their beef is much more personal when compared to south America”</i>	Producing beef in the UK	Production systems
<i>“we take more care in their attitude and we actually get to know cattle on a one and one basis, whereas the herds are so large in south America, they are just one big herd”</i>	Producing beef in the UK	Social
<i>“difference that is most obvious to me Is the technology, you know when we look at stuff like packaging and technical aspects”</i>	Technological developments	Technology
<i>“Our technology development are very much leading the way, we do have the technical knowledge and the facilities, we are always the ones trilling stuff first etc”</i>	Technological developments	technology
<i>“The south Americans are actually not massive on their new product development, I’d say we are very much always on the lookout for the next trend, and we will develop to that trend.”</i>	Development of new beef products	technology
<i>“they are operating on huge scale”</i>	Size of industry	Risen to prominence
<i>“I don’t necessary think there is anything that we can learn essentially, they are just very different, weather Is perfect for them”</i>	What can the UK beef industry learn	Future
<i>“I think it’s just important to focus on what we do well and build from that, I think that’s how the best things happen, it’s important to continue to develop and build on what we do best”</i>	Future of industry	Future
<i>“did was design a scheme, and looked at the stuff they do well, from there they developed what they do well, and now they are doing particularly well. So maybe if we were to follow similar steps and focus on the stuff we do well, that could work”</i>	Beef industry in relation to Uruguay	Risen to prominence
<i>“with South America, I think the future is looking good, I personally do not see it gaining more market share”</i>	Future of industry	Future
<i>“As consumers tend to care more about where their food comes from in the UK, I think it may rub off on the south Americans”</i>	Industry trends	Environmental

<i>“People love the fact that their beef are out all year, they seem to highlight that all the time and I think it works well for them”</i>	Climate	Environmental
<i>“I think sales and export sales will remain the same, they will always be huge meat eaters, and the cultural aspects will never change in that way”</i>	Future of South American beef industry	Future
<i>“They are very passionate people, who care about what they are producing”</i>	South American beef industry	social
<i>“UK beef industry, I think we here have potential to develop further, we have what it takes to go bigger, but in order to do this, I think we as a nation should try to work together more, we really need to collaborate more”</i>	Future of the UK beef industry	Future
<i>“people are big now on eating local, but also sustainable and cost effective, but sustainability means different things to different people, so I think the key is to sell the product and market it very well”</i>	Industry trends	Environmental Social

#### Interview 9:

<b>Data showing evidence</b>	<b>Descriptive coding (concepts)</b>	<b>Category</b>
<i>“they do everything so big, the land is exceptional and very beautiful, you really need to get yourself out there, it really is a beautiful country. It has so much to offer, particularly great opportunities within the beef industry”</i>	Personal experience	Social
<i>“South American have always been passionate about the beef they produce, they value the food they produce, and are very grateful for all the exports they do”</i>	South American beef industry	Social
<i>“It has always been very big on producing beef”</i>	Size of industry	Risen to prominence
<i>“they are very big, have a lot of facilities, they really have a lot of power within the supply chain. So having slaughterhouses who know exactly what they want and acting very proper has developed the industry. I would say people have a lot of respect for the slaughterhouses.”</i>	Power within supply chain	Environmental
<i>“have cultural influence, along with economics and politics, they all come into it”</i>	Cultural influence	Social
<i>“south America is considered a domestic product”</i>	Cultural influence	Social
<i>“a lot of cultural influence that comes into producing beef, it’s a big business that goes back years</i>	Cultural influence	Social

<i>and years, it's something they are passionate about, and have always lived with"</i>		
<i>"element is the economics, one would say there has been economic issues, for example here the labour wages are much lower, and perhaps that's one of the reasons, or factors that has enables south America to develop faster, and at a very good rate"</i>	Economic influence	Economics
<i>"Everything is much more expensive in the UK"</i>	Economic influence	Economics
<i>"Weather is another factor, we have really good weather, don't get me wrong it does fluctuate, but whereas in the UK you only have maybe a total of month during the summer where you could BBQ food"</i>	Climate and environment	Environmental
<i>"bring cattle in over winter due to very harsh conditions, but, it's very different climates, you have to remember that"</i>	Climate and environment	Environmental
<i>"export large amounts of beef and have good weather to produce the beef"</i>	Size of industry	Risen to prominence
<i>"South America as a whole, when you look at it from an agricultural side of things, it can be said that we are actually quite specialised"</i>	Personal opinion	Social
<i>"it can be said they are specialists in producing very high quality beef that everyone's loves. Whereas when you look at the UK, personally, I think it's very diverse, very much not focused into one industry, you know it is very broad."</i>	Agriculture	Environmental
<i>"the weather, you know, perfect conditions for producing good beef, but also the UK produce amazing beef too, so it's interesting how both do good beef"</i>	Climate and environment	Environmental
<i>"I think its seen as a good job, or a good career if you go into producing beef, and particularly doing it well"</i>	Education	Social
<i>"Whereas in the UK, I think the mindset is changing, I think we need to be more open about the various roles there is in food and agriculture, the industry is very diverse and has so much to offer, from genetics, all the way down to new product development and processing of this meat"</i>	Personal experience	Social
<i>"in terms of stability, maybe the UK has better procedures and policies in place, they are very much switched on"</i>	Policies	Politics

<i>“They seem to be one step ahead in terms of technical issues etc, where maybe south America is just not quite there yet”</i>	Technology developments	technology
<i>“In terms of processing I do think south America countries are very good, especially in Argentina, they are absolutely huge and they really do have the best of the best in terms of facilities, so in that sense they are very good. And there power is very big too”</i>	Production systems	Production systems
<i>“price is a big challenge, the price fluctuating is considered to be a challenge, recently its up and down, which can make things difficult.”</i>	Economic influence	Economics
<i>“We export huge amounts, so should anything happen to one of our exporting countries, we would struggle and I think that should be considered as a challenge within the industry.”</i>	Challenges within the beef industry for South America	Risen to prominence
<i>“look at China, the amount we sent to them Is scary, they take so much of our beef, however should something happen to china we really would struggle, we would have all this beef, but no one to take the bulk of it”</i>	Significance of exports	Risen to prominence
<i>“everyone wants cheaper beef, in essence, the cheaper beef always sells, countries that we typically export too, aren’t really that bothered about where the product comes from, but there more into the price”</i>	Challenges within the beef industry for South America	Economics
<i>“with much lower costs here to produce beef, that’s why we have developed to being so big within the market. Stuff such as labour costs, and producing beef that’s more cost effective”</i>	Developments	Risen to prominence
<i>“Brazil, they get very much bad press regarding the amazon”</i>	Media influence	Social
<i>“Brazil is actually a very green country and they are certainly not ruining the amazon, they are protecting it”</i>	Personal opinion	Environmental
<i>“future for south America beef industry very bright, I do think due to the size of industry and just generally the way we operate, we particularly may find It hard to grow bigger and develop as fast as the UK might find”</i>	Future thoughts	Future
<i>“meat has always been such a big thing, and I say this as culturally, you know it is a big thing. People have always eaten meat”</i>	Cultural influence	Social
<i>“there is a lot that is being done in schools here, especially in</i>	Education	Social

<i>Brazil, where they have guest speakers that come into schools, where they talk about the diverse careers that's available within the agriculture industry, so personally I think this could help the beef industry recruit more young professionals”</i>		
<i>“safe to say that the industry future is certainly looking bright, and will continue to be a great industry”</i>	Future of South American beef industry	Future
<i>“south America beef industry is huge, they have everything in their favour, for example the weather, climate etc. So perfect climate to produce beef”</i>	Climate and environment	Environmental

#### Interview 10:

<b>Data showing evidence</b>	<b>Descriptive coding (concepts)</b>	<b>Category</b>
<i>“And I did a lot of importation from around the globe, that could be Australia, New Zealand, South America, etc, etc.”</i>	Personal experience	Social
<i>“countries are ran differently, and I think that makes a big difference”</i>	How they have risen to prominence	Risen to prominence
<i>“beef is as a commodity for exports, foreign currency”</i>	Cultural influence	Social
<i>“cutting down the rain forests for cattle grazing, that's all in the media, and that is bad. But that doesn't happen”</i>	Sustainability	Environmental
<i>“distinct difference in breeds as well as climate as well as what people do. And what the government shall we say, turn a blind eye to in some respects”</i>	Government intervention	Political
<i>“domestic consumption in somewhere like Argentina”</i>	Cultural influence	Social
<i>“you can have rioting in the streets if, if they've exported too much beef and they're running a bit short. It's a big, big, big protein staple”</i>	Challenges for South American beef industry	Political
<i>“Beef plays a massive part in people's diets”</i>	Consumption	Social
<i>“In Brazil, Argentina and Uruguay the beef is usually considered to be better quality. I think people do say that Uruguay do have the best beef generally, in terms of quality”</i>	Quality of beef in South America	Production systems
<i>“Uruguay, will argue as far as they're concerned that their beef is far superior to the boss indicus that they have up in Brazil”</i>	Quality of beef in South America	Production systems
<i>“there has been a lot of government support, there is, you know, the vast majority of their population live, you know, day</i>	Government support	Political

<i>in, day out on beef, one shape form or another”</i>		
<i>“. From my experience I've been to some abattoirs that kill 3000 heads a day, It's a very different setup. For argument sake its twice as long, you have twice as many people, therefore you run it twice as fast, I would say it is very efficient”</i>	Production process in relation to South America	Production systems
<i>“So efficiency and scale of the industry is important to keep in mind”</i>	Size of industry	Risen to prominence
<i>“labour, they don't have, minimum wage and all those labour or the legislation around labour hiring, firing is completely different.”</i>	Working conditions	Economics Social
<i>“Agriculture here, you'll hate me for saying this. As far as the government is concerned, it doesn't really count as a big revenue earner”</i>	Personal opinion in relation to the UK industry	Political
<i>“the stuff we won't eat here, it's for domestic consumption.”</i>	Cultural influence	Social
<i>“In South America, they're out on grass, 52 weeks of the year. They don't need to do but they're almost organic. If you think about the winter, they don't really have any snow, frost etc, so climate is a big difference indeed”</i>	Climate and environment	Environmental
<i>“big believer in developing all the time, and always improving processes”</i>	Future thoughts about the industry	Future
<i>“Argentina or Brazil, the sides of beef hanging are like peas in a pod, they literally look exactly the same. They're very similar weights, very similar conformation, fat levels, etc. So, I think consistency is something they are bloody good at”</i>	Quality of beef	Production systems
<i>“they really get consistency in terms of yields and all other stuff, they are consistent all times, which one would argue the UK isn't”</i>	Consistency	Risen to prominence
<i>“cutting down the rain forests and all the other stuff in Brazil is a challenge”</i>	Challenges for South America beef industry	Environmental
<i>“You also have stuff such as tariffs”</i>	Economic influence	Economics
<i>“cost of production, its completely different to what it is here now”</i>	Economic influence	Economics
<i>“meat consumption has gone up. So if it was that bad, from a health point of view, from a climate point of view, and all that negativity that kind of has been circulating around red meat as</i>	Consumption	Social

<i>cattle, pigs and sheep, why has our consumption gone up”</i>		
<i>“I think future is looking good, meat consumption will still rise slowly. We will and always will eat meat, so as far as I’m concerned the industry should not worry”</i>	Future thoughts	Future

**Interview 11:**

<b>Data showing evidence</b>	<b>Descriptive coding (concepts)</b>	<b>Category</b>
<i>“historically, beef has always been a part of the South American culture, it’s something they have always have”</i>	Cultural product	Social
<i>“a commodity product, you know, it was considered to be an easy way for us to make some money,”</i>	Commodity	Social
<i>“but we have the climate, we have the perfect weather for producing beef, this is bang on what we need to make and produce good beef, so in theory we are always going to be one step ahead of the UK”</i>	Climate	Environmental
<i>“everything as cost effective as possible”</i>	Cost effective	Economical
<i>“The whole idea that we, us South Americans are focused on one aspect of agriculture, just one aspect, I know we have a range of other agriculture that goes on here, but I find it interesting that it is mostly dominated by the beef industry.”</i>	Focused agriculture	Environmental
<i>“we have the climate, the weather and the correct land for producing beef,”</i>	Climate	Risen to prominence
<i>“we have the natural resources that is needed to produce beef.”</i>	Resources available	Environmental
<i>“beef outside all year and not have to spend on keeping them inside,”</i>	Weather	Environmental
<i>“it was a commodity product, it still is in some places, and then we have just ended up specialising in it, it’s great”</i>	Cultural	Social
<i>“we exports huge amounts which the region depends on for an income, our economic situation would be very different without out beef industry”</i>	Dependant on the income from beef sales	Economics
<i>“If you look at the GDP of each south American country, and compare it to the UK you will see so much difference in the percentage. We have rely so much more on the beef industry for our income,”</i>	GDP	economics
<i>“we have cultural influence and all that, we will always be consuming beef and always will,</i>	Future of south America beef industry	Future

<i>it very much is a cultural thing. So on that note yes we have a bright future ahead of us.”</i>		
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**Interview 12:**

<b>Data showing evidence</b>	<b>Descriptive coding (concepts)</b>	<b>Category</b>
<i>“I have lived on a beef farm myself, my family farms beef here in Brazil, we very much like it, please note its not a huge farm but I guess its something right, we do it more as hobbies rather than full time”</i>	Personal thoughts	Social
<i>“it really is beautiful, if you every get the chance to visit you must come”</i>	Personal thoughts	Social
<i>“. It is a region that fully utilizes its natural resources you know”</i>	Natural resources	Environmental
<i>“They use their land to the max, without over using it, they are clever people and know how to produce good quality beef,”</i>	Use of land and resources	Environmental
<i>“Brazil, where I am, we have a lot of bad media and bad press which doesn’t help us, we are always battling against these,”</i>	Medial influence	Social
<i>“we are very much green, people here do our best to help the environment”</i>	Green – Brazil	Environmental
<i>“very much known for producing beef, very friendly people, I think I would say they are the most well-known within south America for producing beef”</i>	Personal thoughts	Social
<i>“would say it’s mainly a cultural factor”</i>	Cultural	Social
<i>“Also domestic markets too, we exports huge amounts as you already know so that helps us, we would not be who we are today without the exports we have”</i>	Domestic markets	Risen to prominence
<i>“beef is a commodity product, many people rely on beef, so I think that tradition has stayed with us and its just always will and always has been a part of our lives”</i>	Commodity	Social Risen to prominence
<i>“climate and the weather, something that works well for the region, we have stuff like the natural resources to produce beef without us spending extra money on it”</i>	Climate and weather	Environmental
<i>“its culture, it something that stays with the region, also word of mouth, it’s the same with everything”</i>	Cultural	Social
<i>“We can produce the volume, we are reliable, we produce good quality beef, I do think its as simple as that”</i>	Volume of beef	Production systems

<i>“For me personally, it will be a bright one, however, I do see us finding it hard to grow,”</i>	Future thoughts	Future
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Interview 13:

<b>Data showing evidence</b>	<b>Descriptive coding (concepts)</b>	<b>Category</b>
<i>“my mind is international trade specialisation, that’s something we do very very well, we have all the resources we need to produce beef, not only for ourselves but also for the world.”</i>	International trade specialisation	Environmental
<i>“natural resources, the weather is so warm and great for the beef. This means we don’t need to spend more money than we need to”</i>	Climates / resources	Environmental
<i>“UK they have lot of different agriculture, but I can’t think of something they specialise in, maybe this is me, but I think the uk focuses on lots of various aspects of agriculture.”</i>	Agriculture	Production systems
<i>“I think for me in terms of beef itself, we both have very good quality beef, and we both know how to produce good beef and even sell it, we obviously focus much more on exports etc.”</i>	Production systems of beef	Production systems
<i>“is seen as a good job here in brazil if you go into the beef trade, everyone is wanting to get into the meat industry and its seen as something good;”</i>	Education	Future
<i>“which leads me on to suggest perhaps more talks and education on why its such a good industry could be a good thing for the UK.”</i>	Education	Future
<i>“. Id say we do a lot more genetics compared to you guys, its something that is very much the new trend here”</i>	biotechnology	Technology
<i>“we always eat beef here, my family love beef, when I was a little boy I was always eating beef, my parents were the same, they would always depend on beef.”</i>	Personal experience	Social
<i>“we depend on the protein, we love it. It’s a domestic product, it’s a commodity, and it’s a commodity because we have always had and always will have the resources to produce it.”</i>	Domestic, commodity product	Social
<i>“it will always be a big industry, it’s something that has always done well and always will do very well. I do think we might find it hard to continue to develop and grow bigger, simply</i>	Future thoughts	Future

<i>due to the competition we have, also pressure from the media”</i>		
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Coding framework model evidence:

Categories	Codes	Description of code	Excerpts from data set
<b>A- Environmental</b>	<b>A1</b> Climate	The climate's effects on the production of beef cattle.	"very lucky in terms of the weather and their climate, it really is perfect for producing good beef"
	<b>A2</b> Environment	Environmental factors influencing the South American beef industry.	"We can produce grass during the whole year, and I think that's why we're doing so well."
	<b>A3</b> Sustainability	Sustainability in relation to today's beef industry.	"difficulty has been more in relation to sustainability issues, modern slavery issues and reputational issues"
<b>B- Social</b>	<b>B1</b> Education	Comments mentioning education in any context.	<i>"there is a lot that is being done in schools here, especially in Brazil, where they have guest speakers that come into schools, where they talk about the diverse careers that's available within the agriculture industry, so personally I think this could help the beef industry recruit more young professionals"</i>
	<b>B2</b> Consumption	Consumption of beef within the UK and South America	<i>"meat consumption has gone up. So if it was that bad, from a health point of view, from a climate point of view, and all that negativity that kind of has been circulating around red meat as cattle, pigs and sheep, why has our consumption gone up"</i>
	<b>B3</b> Culture	Culture influence.	"It's a culture where people are always eating meat anyway. That is just the culture"
<b>C- Economics</b>	<b>C1</b> Investments	The type of investments that has gone into South American beef industry.	"been lots of investments and development in urban areas, they have changed dramatically which has boosted the economy here"
	<b>C2</b> Cost of production	The cost of producing beef.	"Very little labour costs associated with their beef, they can simply calf on the field and maybe once a month the farmer will go round and check everything is ok"
	<b>C3</b> Support available	Financial support available to beef farmers, and its influence of production of beef cattle.	<i>"there has been a lot of government support, there is, you know, the vast majority of their population live, you know, day in, day out on beef, one shape form or another"</i>
<b>D- Political</b>	<b>D1</b> Political influence	How political factors shape the industry.	<i>"I think politics is a big thing, a lot of policies and various arguments shape how the industry Is ran, especially you know south America export so much of their beef, and then you have to consider stuff such as export taxes, and various subsites"</i>
<b>E- Technology</b>	<b>E1</b> Processing technology	How has technology changed the beef industry, particularly focusing on processing technology.	<i>"technology has changed quite a lot Morgan. Especially processing technology and refrigeration and storage techniques"</i>

	<b>E2</b> Biotechnology	How has technology changed the beef industry, particularly focusing on biotechnology.	<i>“genetics, erm I have lots and lots of experience within genetics and actually that’s what my business currently is”</i>
<b>F- Future</b>	<b>F1</b> Future thoughts for South America beef industry	Future thoughts regarding South American beef industry.	<i>“genetics is going to be huge, I’m telling you, it will grow and grow, it already is a huge business in Brazil”</i>
	<b>F2</b> Future thoughts for UK beef industry	Future thoughts regarding UK beef industry.	<i>“know every country is slowly getting richer and richer and that means more to spend on food. So I do think that the future is looking bright”</i>
<b>G- Risen to prominence</b>	<b>G1</b> Size of industry	Any comments that mention size or scale of industry that link to how South America have risen to prominence.	<i>“do everything on a much larger scale to the UK, and when everything is done on a much larger scale It brings cost down.”</i>
	<b>G2</b> Domestic market	How domestic markets have benefited south America beef industry rising to prominence.	<i>“Beef is considered to be a domestic product over there, you know, people have grown up on beef, they consume so much more beef than what we do here”</i>
	<b>G3</b> Export markets	Influence of export markets supporting South America rise to prominence.	<i>“Brazil and Uruguay have risen to prominence in terms of beef production and export market”</i>
	<b>G4</b> Political influence	Political influence resulting in how fast countries rise to prominence	<i>“countries are ran differently, and I think that makes a big difference”</i>
<b>H- Production systems</b>	<b>H1</b> Intensive and intrusive beef production	Comments relating to beef production, suggesting intensive and intrusive systems.	<i>“In the UK, we are much closer to the cattle, and one may even say we are too close to these cattle”</i>
	<b>H2</b> Diverse agriculture	Diverse agriculture systems	<i>“Whereas in the UK, I think the mindset is changing, I think we need to be more open about the various roles there is in food and agriculture, the industry is very diverse and has so much to offer, from genetics, all the way down to new product development and processing of this meat”</i>
	<b>H3</b> Specialised agriculture	Specialised agriculture	<i>“South America as a whole, when you look at it from an agricultural side of things, it can be said that we are actually quite specialised”</i>