

The countries chiefly responsible for this great falling-off are Holland, which only sent us 198,035 sheep as against 498,458 in 1888, and Germany, whence we received only 193,191 as compared with 299,589 last year. This is undoubtedly owing to the discovery of foot-and-mouth disease in consignments from Holland, and the consequent slaughtering of the animals immediately upon landing. The decrease in the sheep trade has not been made up, in the case of Holland, by the shipment of dead mutton. In 1888, 87,799 cwts. of mutton were shipped from Holland to England, and during the past year the quantity has decreased to 77,720 cwts., thus showing that unless the Dutch sheep can be shipped and admitted to the country alive, the market is not profitable. Canadian sheep, on the other hand, although not shipped in such numbers as could be wished, show an increase from 45,339 head in 1888 to 55,857 in 1889, and from Denmark the increase has been from 94,454 to 153,362. Both Canada and Denmark having a clean bill of health, the exporters in the two countries have reaped the benefit of their immunity from disease.

Whilst, as I have shown, the increase in United States live cattle has been over 100 per cent., notwithstanding that the animals have to be slaughtered on landing, the dead beef trade has only increased from 213,376 cwts. to 253,585 cwts. in the twelve months. What could prove more conclusively that the live cattle trade is more profitable than that of dead meat, and that Canada, therefore, possesses very great advantages over the United States? There has been an enormous increase in the dead mutton trade; the bulk of this is not refrigerated, that is kept cool, like American beef, but is frozen solid, and this will always prove a disadvantage.

The quantity of dead mutton imported from all countries rose from 989,085 cwts. in 1888 to 1,226,669 cwts. in 1889, and the values are given as £1,940,979 in 1888, and £2,578,621 this year. The increases are principally from Australia and New Zealand. In 1888, from these colonies, 543,117 cwts. were imported; in 1889 the quantity had risen to 612,578 cwts.; from the Argentine Republic the increase was from 346,806 cwts. to 394,979 cwts. The first shipment of live sheep from the Argentine Republic has just arrived. It was a trial shipment of some 150 head, and was disposed of at Glasgow at fairly good prices, but great doubts are expressed in the trade here as to the possibility of conducting an extensive trade in live sheep between the two countries as the animals have to cross the equator.

The supply of home-bred mutton is annually decreasing. In 1869 there were 29,538,148 sheep and lambs in Great Britain; these decreased by 1879 to 28,157,080 head, and 1889 shows a still further reduction to 25,632,020 head, or a decrease during the last twenty years of nearly four million head.

The cattle trade from the Dominion has been, as I have shown, on a more extensive scale than in recent years, and, I trust, shows greater profits. I would again refer to the question of early maturity, to which I alluded more particularly in my last report. Great attention is being paid to the matter by the agricultural press and the leading agriculturists, and the necessity for it on the part of Canadian farmers should be fully recognized.

The prejudice against Canadian store cattle has been entirely overcome. Practically the number of live stock in this country has not increased during the last twelve months, and arrangements are being made for still larger shipments of store cattle from the eastern Provinces, and attempts will be made to initiate a trade in store stock from the Province of Manitoba and the ranching districts early in the spring.

It is the general opinion that though the Argentine Republic and Australasia may compete with the Dominion in the matter of frozen mutton, their chances of building up a live cattle or dead beef trade with this country are very remote. The freedom of Canadian cattle from disease gives the Dominion, practically speaking, a monopoly in the store stock trade. The Canadian ranche cattle which have arrived are stated by the dealers to have been of exceptionally good quality, as compared with those of previous years. A number, however, were sorely distressed with the journey. Attempts have been made to introduce them into the feeding districts in various parts of Great Britain, and the result is being watched with interest by the importers and feeders. I have again to acknowledge the courtesy of Dr. May, the