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Agri-Business Firms and Irish Agriculture in the Decades to Independence

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Abstract

Most agricultural output in early 20th century Ireland was consumed on the farm or exported in an unprocessed state. A significant share nevertheless served as an input to Irish industry. While farmers and agri-business firms operated on opposite sides of the market, their relationship was symbiotic: the health of one impacted on the health of the other. Success on the part of agri-business firms improved agricultural market conditions in Ireland, and successful firms frequently contributed to improvements in the quality of agricultural produce.

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Introduction

While the bulk of Irish industry was located in the north of Ireland in the early 20th century, most of the important southern industries were based on the processing of local agricultural inputs. These backward linkages substantially increased the overall significance of industry to the southern economy.

The main processing sectors in 1912 in what would become the Irish Free State were, in order of employment: (i) bread, flour confectionery, biscuits, sugar confectionery and jam making; (ii) brewing and malting; (iii) dairy products; (iv) grain milling; (v) bacon curing; (vi) aerated waters and other drinks; and (vii) distilling.¹ Dairy products production had by far the most significant backward linkages and has been the subject of intensive study. With the exception of this sector however, as Bielenberg notes, “food processing remains a particularly under-researched element within Irish industrial history during the Union”.²

Butter comprised the vast bulk of dairy sector output and the problems with the quality of Irish butter over the period of analysis have been well-documented. An 1892 publication noted that “in many districts of England a positive prejudice against ordinary salted butter—the quality generally packed for shipment—grew so strong that the very name of Irish butter, no matter how superior, caused it to be looked upon as only a very second-rate article”.³ Irish butter’s share of the British market fell from over 50 percent in 1860 to 12 percent in 1910, while Denmark’s increased from under 1 percent to almost 40 percent over the period. Denmark’s co-operatives were able to produce butter of a consistently high quality, while, “in Ireland, production methods were

¹The first Census of Industrial Production (CIP) for the Irish Free State was produced for 1926, but details were also provided for the Free State area for 1912. While the latter were reported with a series of caveats, the ordering of the sectors was similar for the two years.

² Bielenberg, “Flour milling”, 59.

³ Stratten and Stratten, “Literary, commercial and social review”, 152.

still primitive and the marketing system, if such it could be called, was deplorable”.⁴

Branded Irish bacon, on the other hand, sold at a premium in Britain throughout the period. Irish beer and biscuits also performed strongly, while Irish whiskey lost out to the Scottish product in much the same way as Irish butter lost out to its Danish competitor. The present chapter analyses the performances of the major Irish food and drink manufacturers over the decades prior to the establishment of the Irish Free State in 1922.

Bacon Curing

Irish bacon traded at a premium over its counterparts on the British market. Munster, as the most significant dairying region, accounted for the bulk of pigs due to the use of skim milk as feed. Limerick had long been the predominant port for bacon exports. Three of the ‘big four’ firms—Matterson (which dated from 1820), Shaw (1831) and O’Mara (1839)—were based in the city. Henry Denny & Sons, which would grow to be the largest, was established in Waterford in 1820 but also had a substantial operation in Limerick from an early stage in its history.

Irish bacon curing was an innovative sector, particularly with regard to pickling, which determined the longevity of the product. Before the adoption of ice curing, speedy delivery was paramount and fleets of sailing ships known as “Limerick Liners” carried bacon and hams in cabin berths to London. A similar trade was carried on from Waterford. By the 1860s ice was being imported from Norway, which extended the curing season across the entire year.

The famous “mild cure” or “Limerick cure”, which is mentioned in advertisements to this day, was developed in the city in 1880. The method originated by chance, as Limerick producers who were short of money at the time produced meat in what was considered to be a half-cured

⁴ Bolger, “Co-operative movement”, 64.

condition. The unintentional cure proved extremely popular.⁵ A British historian of the provisions trade refers to “mild-cured bacon” as “the only type the British liked.”⁶

The Irish bacon curers vigorously defended their brands. A special circular issued by Denny reported that: "This trade mark or brand is burned into every one of our best quality Hams and Middles, and without it none are genuine".⁷ In 1878 the bacon curers, under Denny's leadership, signed a letter of protest objecting to a practice that had recently been adopted by London traders. The letter read:

Dear Sir,

The old-established custom of our trade—and indeed of most kindred trades—is that goods should bear the name of the Manufacturers, thus identifying the article made with the producer, and making his reputation a guarantee to the dealer and the public. We take the liberty of drawing attention to an innovation upon this custom which has recently taken place. Some influential London Houses made arrangements with certain Curers to discontinue their ordinary brands—which, it must be presumed are not held in sufficient esteem by the public—and to adopt in lieu thereof the initials of the London firms. The effect of this alteration has been to give a fictitious value to the Bacon so branded, and to prejudice the interest of other shippers, who, by long and continued exertion, have made a reputation for their Brands, and possess the confidence of dealers and the public.⁸

The success of the Irish bacon curers also contributed to the improvement of input quality. In the late 1800s, through the medium of the South of Ireland Bacon Curers Pig Improvement Association, the major curers worked with the Department of Agriculture and Technical Instruction

⁵ Shaw, “Bacon-curing industry”, 254.

⁶ Barty-King, “Making provision”, 94.

⁷ <http://catalogue.nli.ie/Record/vtls000543592>

⁸ Barty-King, “Making provision”, 29.

(DATI), the Congested Districts Board (CDB) and the co-operative body—the IAWS—“to get the farmers to breed the class of pigs most profitable to themselves and most suitable for the production of high-class bacon”.⁹

Of course, being on opposite sides of the market, the interests of upstream producers and downstream firms were not completely aligned. There were rumours in the depression-era of the 1930s for example that Denny & Sons closed their Limerick operation in exchange for Matterson closing their Waterford factory.

Brewing

The Irish brewing industry was dominated by Guinness, whose brewery at St. James’s Gate dated from 1759.¹⁰ From the 1820s, when the introduction of steamer services to Britain cut sailing times dramatically, the company began to develop a strong export trade, which was further assisted by the expansion of the British railway network.

Though Guinness retailed at a premium price in Britain, its merit and distinctive flavour were singled out for praise in an 1846 London publication on the theory and practice of brewing.¹¹ At a time when sugar and other ingredients were added to malt to produce weaker and cheaper mass-market beer, a House of Commons Return in 1878 named the firm as one of only five breweries not to dilute its malt in this way.¹² The historians of the company’s early phase, Lynch and Vaizey, propose that among the most significant steps in this period “was to lay down in 1821 a standard procedure for the brewing of what was to become the firm’s chief product—Extra Superior—so that a consistency of quality could be maintained”.¹³

⁹ Riordan, “Trade and Industry”, 79; *Times* of London, March 17, 1913, 21.

¹⁰ The material on Guinness draws on Lynch and Vaizey, “Guinness, 1759–1876”, and Dennison and MacDonagh, “Guinness, 1886–1939”.

¹¹ Tizard, “Theory and Practice of Brewing”.

¹² Lynch and Vaizey, “Guinness”, 222.

¹³ Lynch and Vaizey, “Guinness”, 160.

Jones remarks that “the Victorian brewers maintained that their key competitive advantage lay in maintaining product quality and consistency”.¹⁴ Any marked drop in gravities and quality drove away customers in hordes. Reputation was largely spread by word-of-mouth, encouraged, as Wilson reminds us, by “careful promotion of the brewer and his brewery in the local press, reports about involvement in politics and charitable effort and, above all, the growth of the brewery sketched in those statistical terms that the Victorians demanded.”¹⁵

By 1886 Guinness was the biggest brewer in the UK and by 1920 St. James’s Gate was reputed to be the biggest brewery in the world. The company’s archives reveal that it employed over 3,200 in 1906 and by 1919 employment had grown to over 4,000.

Michael Bass MP, a member of the prominent British brewing family, was a leading advocate for the registration of trade marks, which became possible with the passage of the Trade Marks Registration Act of 1875. The Bass red triangle was the first trade mark to be registered. Guinness followed in 1876. Registration of the trade mark did not however prevent adulteration of the product by bottlers. Beer trade marks were in any case difficult to protect, as beer was easy to imitate and adulterate. The company enacted prosecutions soon after the passage of the 1875 Act but the discovery in 1889 of widespread adulteration of Extra Stout in England led it to appoint travelling officers to carry out investigations. It followed up in 1896 by employing a fully qualified chemist to support the prosecution work.

In terms of backward linkages, Guinness was the most important purchaser of Irish barley, generally taking around half of the crop. By 1913, it was purchasing more than twice as much Irish barley as thirty years previously. From the mid-1890s the brewery began to approach its processes more scientifically, and it began to co-operate with the farmers’

¹⁴ Jones, Introduction to “Adding value”, 5.

¹⁵ Wilson, “Beer in Victorian Britain”, 122.

co-operative movement (the IAOS) and DATI in barley-improvement schemes. This benefitted both the company and its input providers. Barley yields rose from 8.5 barrels an acre in 1895–90 to 10.5 barrels by the 1920s, “and a much larger proportion of the crop was of malting quality, commanding a higher price”.¹⁶

Distilling

Distilling also comprised a significant component of the market for Irish grain. It used between one-third and one-half of the amount of barley used in brewing and also used locally-produced oats and wheat. By the early 20th century, however, Scottish output had surpassed—and indeed grown to double—that of Ireland.¹⁷

The Scottish and Irish industries had responded differently to the major innovation in distilling, which was the development of the “patent” or “Coffey” still, named for its inventor, the Irishman Aeneas Coffey. The traditional pot still, whose use was largely retained in Ireland, manufactured pure malt whiskey from home-grown corn. The alternative method employed a different process to produce a spirit made from maize, Indian corn, oats and other imported cereals. The output of the patent still was then blended with a small proportion of pot-still whiskey to provide flavour.

The new process was far more economical in terms of time, fuel and labour, while its imported input mix was also much cheaper. The Dublin firms fought a rear-guard action against the new product. Irish members of the UK parliament sought unsuccessfully to introduce an amendment to the 1875 Adulteration of Food and Drugs Bill to prevent the new product being labelled as whiskey as it was “adulterated” with “silent spirit”. Some protagonists sought a legal definition that would restrict the title to pot-still whiskey made from a mash entirely composed of home-

¹⁶ Dennison and MacDonagh, “Guinness,” 102.

¹⁷ The section on distilling draws on Townsend, “Lost distilleries”; Bielenberg, “Industrial revolution”; Ó Gráda, “New economic history”, and Weir, “Distilling and agriculture”.

grown grain. As Ó Gráda notes however, “Irish pot-still distillers’ concern for quality was not shared by consumers”.¹⁸ In fact, though Irish firms generally specialised in pot-still and Scottish firms in patent-still whiskey, Ireland lost out to Scotland on both fronts. Ó Gráda ascribes this to the lack of marketing on the Irish side.¹⁹ Bielenberg concurs, citing contemporary accounts that allude to the fact that Scotch merchants and blenders paid more attention to prices, public tastes, marketing and advertising.²⁰

Weir notes that the structure of the Scottish industry was favourable to collusive action, given the dominance of Distillers Company Limited (DCL) that held close to a monopoly position in Scotch Whisky at the time.²¹ There was much less consolidation in the Irish industry, which in any case produced a less malleable product than the Scottish industry, which could produce blends targeted at a wide variety of tastes and desired expenditure levels. In 1891, the largest of the Dublin establishments, George Roe’s, joined with two other smaller firms to form the Dublin Distillers Co. Ltd. (DDC). According to Townsend however the combination had little effect: each member company continued to produce under its own name and sold its product to its own customers, often in direct competition with the other two. None of the firms had a strong brand image and Roe’s in particular was dangerously exposed on export markets to the growing popularity of Scotch. Two of the three distilleries closed in 1923 and the third in 1926.

Two smaller Dublin companies, John Jameson and Power’s—both of which had stronger brand recognition—survived. It would take until the 1960s for these and the other leading Irish distillery company to combine as the Scottish firms had done and to emulate the success of the latter on export markets.

¹⁸ Ó Gráda, “New economic history”, 301.

¹⁹ Ó Gráda, “New economic history”, 301.

²⁰ Bielenberg, “Industrial revolution”, 94.

²¹ Weir, “Alcohol controls”, 1296.

While Scottish pot-still whisky had a declining share of the spirit market, the overall market for Scotch was expanding, so that malt distilling requirements continued to offer local Scottish farmers a market for their barley, and one that was much more remunerative than its alternative use as a feedstuff. For Ireland, the loss of consumer markets by the distilleries led to a shrinking of demand for the output of the agricultural sector.

Biscuits and Flour Milling

The Irish biscuit producer Jacob's—the main firm with which this section is concerned—employed 1,300 workers in the early 1900s, with substantially more on its books in the run-up to Christmas. Even at this stage, almost 90 percent of its output was sold outside Ireland.²²

Jacob's had been established in Waterford in 1851 but shifted production to Dublin two years later. Biscuits started out as a maritime provision but the market for fancy biscuits expanded with rail travel and the growing popularity of tea. As in the case of the other major UK biscuit producers, Huntley & Palmers and Peek Frean, Jacob's was Quaker-owned, which contributed to public confidence in the quality of the product. “At a time when adulteration of food was widespread”, Ó Maitiú notes, “the public put their trust in Quaker-produced food items”.²³

Jacob's rapidly achieved a reputation for quality, winning out over competitors including Peek Frean & Co. of London to take a medal at the Dublin International Exhibition of the mid-1860s. Like the other leading biscuit manufacturers it put much thought and creativity into its artwork and the naming of its biscuit varieties. It capitalised on the wave of orientalism that swept the UK in the late Victorian era—reflected in the popularity of the Gilbert and Sullivan operetta *The Mikado*—by introducing its Mikado biscuit in the 1890s. Another Jacob's biscuit of

²² This section of the chapter draws on Ó Maitiú, “Jacobs”; Bielenberg, “A Survey of Irish Flour Milling 1801–1922”, and an oral history project on Jacobs available online at

<http://source.southdublinlibraries.ie/handle/10599/10750>

²³ Ó Maitiú, “Jacobs”, 30.

enduring popularity, the Kimberley, captured the glamour of South African diamonds and the spirit of the Boer war.

Jacob's were significant purchasers of wheat flour and dairy products, for which particular varieties and combinations were required. Different biscuits required different types of butter and flour. Foreign flour, initially Canadian, was required for the production of cream crackers, the firm's leading product.

Ó Maitiú mentions three particular local suppliers of flour to the firm: Shackleton's, Odlum's and Boland's. Odlum's were the largest flour millers in the country after Bannatyne & Sons of Limerick.

Backward linkages to agriculture would have been diminished by the fact that by the early 1860s wheat imports had come to exceed native wheat production and milling capacity had shifted to the ports. Bielenberg notes that this entailed a "significant decline in flour milling in many inland locations, which depended entirely on native wheat". Significantly, however, Odlum's mills were inland, at locations such as Portlaoise, Portarlinton, Graiguenamanagh and Sallins, suggesting that they may have used a relatively high proportion of locally-grown cereals.

Jam Making

The leading producer of jams in southern Ireland at the time was the Dublin firm Williams & Woods. Initially established in 1856 as a producer of sweets, it expanded later into jam-making. The 1889 publication *The Industries of Dublin* notes that "the numerous hands employed, numbering over 200, testify to the important position this house holds in our manufacturing industries and indirectly to the encouragement given to home growers of fruit in Ireland who have a convenient market, and for months in the fruit season numerous additional hands are employed in preparing the fruit for manufacture".²⁴

²⁴ *Industries of Dublin* (London, 1889), 90.

An *Irish Times* article from 1906 reports that “before Irish jam manufacture became the industry which it is today... [the producers] were dependent mainly upon English and Scotch fruit”. A Belfast jam-maker had induced a farmer in Armagh to grow strawberries as an experiment and by 1906 fruit from Armagh was arriving in Dublin or Belfast twice daily by passenger train and Williams & Woods were using solely Irish fruit in their jams.²⁵ By 1924 the firm had established a farm at Kilsallaghan in north county Dublin to grow its own fruit and to provide milk for use in the production of its toffee and chocolate products.

Dairy Products

Because it did not survive beyond the 1920s, the Limerick-based Condensed Milk Company of Ireland (CMCI) has largely faded from memory. The CMCI produced a wide range of products including cream, butter, cheese, caramel toffee and condensed milk. It was owned by the Cleeve brothers, who had been born in Quebec of an English father and an Irish mother of French Huguenot background. Thomas Cleeve had returned to Ireland to work for his mother’s family and along with other brothers who crossed over later, established a factory at Lansdowne in Limerick in 1881 for the manufacture of prepared coffee. In 1885 the CMCI began to manufacture sweetened condensed milk along with the tin cans in which the product was sold. From 1899 its network of factories, condensaries and dairies spread across the Munster region.²⁶

The Cleeve family fortune crashed in the early 1920s and segments of the company were sold onwards, with some of the names and brands surviving until recent times. The most important development however was the purchase by the state in the late 1920s of the bulk of the surviving company.

²⁵ *Irish Times*, March 10, 1906.

²⁶ The material on the CMCI draws on Jenkins, ‘Tipp Co-Op’; Fox and Breathnach, ‘Proprietary creameries’; Bolger, ‘Irish co-operative movement’; Ó Fathartaigh, ‘Dairy Disposal Company’, and O’Sullivan, ‘Demise of Cleeves’.

Cleeve's had prospered (as had the Denny bacon company) from its contract to supply the British army during the first world war, when condensed milk was distributed to all battle fronts. The value of condensed milk exports in 1918 was half that of all Irish brewery exports. The company at its peak employed 3,000, and was reported to have dealt with "at least one-thirtieth, and possibly considerably more, of the entire dairy produce of Ireland".²⁷

A number of factors conspired to bring about its demise. One was that it was left with considerable stocks in hand at the end of the First World War, which proved costly given the subsequent price collapse. A second was that it suffered disproportionately from the industrial unrest and civil strife of the early 1920s. A third was the long-running "war of attrition" between the private creameries and the co-operatives, from which the latter would ultimately emerge victorious with the support of the new state.

Both co-operative and private creameries had been targeted for destruction by British forces during the war of independence. The CMCI was also targeted by the nationalist side however. The Cleeves were a Unionist family and were denigrated by supporters of the co-operatives as "foreigners". Labour troubles intensified with the political upheaval and collapse of agricultural prices. Numerous of the Cleeve factories were seized by the workers, with ill-will between workers and milk suppliers leading to destruction of plant and equipment. Further destruction was caused by irregular forces during the civil war.

The "war of attrition" was of longer duration. It began around 1900, when two-thirds of creameries were in private ownership. The war was fought through confrontational location strategies, with co-operatives and proprietary concerns locating increasingly close to each other in order to capture local milk supplies. The scarcity of winter milk meant the creameries were not operated to sufficient capacity and the fragmentation

²⁷ Jenkins, "Tipp Co-Op", 77.

of catchment areas impacted on both sides. Over time many of the private creameries closed or sold out either to the co-operatives or to the CMCI, which had emerged as the co-ops' main rival.

The battle for milk supplies was undoubtedly to the benefit of milk suppliers, in the short term at least. Jenkins notes that “Cleeve’s paid higher prices for butter fat in areas where they were competing with co-ops than they did in areas [...] where there was no competition”.²⁸ Ó Gráda concurs that “any substantial rent element probably ended up in the milk suppliers' pockets”.²⁹

The company eventually folded under the weight of these various pressures. It was liquidated in October 1923 with debts totalling half a million pounds. The company’s assets were bought out by a group of investors led by Andrew O’Shaughnessy, owner of the Newmarket Dairy Company and a member of the new Free State parliament, and re-established as the Condensed Milk Company of Ireland (1924). Newmarket Dairy Company was absorbed into the new CMCI the following year and British wholesaler Lovell and Christmas— which had had strong links with the Newmarket Dairy Company—became the major shareholder in the new company.

The “war of attrition” depleted the co-operative movement of most of its cash and credit. Having been warned by Andrew O’Shaughnessy that Lovell & Christmas had sufficient resources to crush the co-ops, the government now received notification that Lovell & Christmas were prepared to sell the CMCI to the IAOS. The offer, as Daly notes, was “an indirect approach to the government, since the company must have been aware that the IAOS lacked the necessary capital”.³⁰

²⁸ Jenkins, “Tipp Co-Op”, 29–30.

²⁹ Ó Gráda, “Beginnings”.

³⁰ Mary Daly, “First department”, 129. The Secretary of the IAOS was the brother-in-law of the Minister for Agriculture in the Free State government.

The government accepted the offer and in 1927 established the Dairy Disposal Company to purchase the CMCI and the other proprietary creameries. This effectively granted the co-operative movement a state-backed monopoly of the industry. This and a number of other government initiatives largely resolved the “free-rider problem” that had stymied the co-ops. The economies of scale that had allowed the CMCI to successfully engage in marketing and distribution were lost however. Its diversified output base and economies of scale had allowed it to pay a marginally higher price for milk.³¹ It would take almost a half-century for the problems that ensued from its collapse to be surmounted.

Concluding Comments

Of the Irish agri-business sectors that performed strongly on export markets, brewing and biscuits were each dominated by a single firm. The export trade in bacon was dominated by a small number of firms, of which Denny was the largest and most successful. Each had achieved valuable brand recognition.

By the early decades of the 20th century, Irish distilling was also dominated by a number of leading firms. Comparison with the Scottish industry suggests that the sector remained overly fragmented however, which precluded it from reaping the benefits of economies of scale in marketing and distribution. As late as the 1950s, as Ryan notes:

There had been fierce competition between Jameson, Powers and Cork Distillers for dominance of the home market, and none of the three had any time, effort, energy or manpower left over for developing exports. So in 1966 [Powers] persuaded the directors of the other two companies to bury the hatchet of 200 years of competition and merge to form the Irish Distillers group. Bushmills joined this family in 1972 and the renaissance was under way.³²

³¹ Fox and Breathnach criticise the government for not forcing the co-operatives to co-operate with each other in order to benefit from scale economies in marketing and distribution: “Proprietary creameries”, 96

³² Ryan, Foreword to “Lost distilleries”, 1.

The later acquisition of Irish Distillers by the French company Pernod-Ricard gave Irish whiskeys access to the group's worldwide distribution network. It had taken many decades for the Irish whiskey industry to follow Scotland's lead.

Problems of marketing and branding also bedevilled the Irish dairy sector from the demise of the Condensed Milk Company in the 1920s to the establishment of the Irish Dairy Board in 1961. The CMCI had had a strong brand image "whereas the co-ops produced their butter under a myriad of names and then competed with each other to sell it in the market place".³³ In Denmark, the "Lurbrand" had been developed as a national trade mark in the early 1900s and within a few years almost all Danish creameries were marketing their butter under the brand. In Ireland, by contrast, up to the 1960s there were at least 60 and possibly many more brands of Irish butter competing in the marketplace.³⁴

The Irish Dairy Board in 1961 belatedly followed the Danes in establishing a national brand for Irish butter. As Anne Randles, executive secretary of the Board describes it:

The launch of Kerrygold on the UK market in 1962 was a bold attempt to differentiate Irish butter from the rest of the competition, to create brand loyalty and ultimately to secure a premium over basic or commodity product for the primary producer. Today the Kerrygold brand is marketed in over 50 countries. It is, by any measure, Ireland's most important indigenously-owned international food brand and has a global retail value of over €500 million.³⁵

The strategic thinking behind the establishment of dairy co-operatives had extended only as far as butter production. The movement was successful in increasing farmers' bargaining power along this segment of

³³ Fox and Breathnach, "Proprietary creameries", 94, 96

³⁴ O'Dwyer, "Dairy manufacturing plants".

³⁵ Randles, Preface to "Butter in Ireland", 10.

the value chain but—in its tendency to denounce all private companies as unproductive “middlemen”—it overlooked the importance of the marketing and branding achievements of the Condensed Milk Company, to the long-term detriment of farmers.

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