



# Assessment the Goat Value Chain in Mid Hills of Nepal

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DOI: 10.47760/cognizance.2023.v03i11.010

## Abstract:

Goat value chain development and analysis is a recently introduced activity for enabling goat production activities to link to the market network. In Nepal, goat production is repeatedly reported rather traditional than commercial. The production volume of goat is the main drawback of goat value chain development in Nepal. Despite the visible market opportunities in the meat sub-sectors, the country has been unable to take advantage of the situation for various reasons. Some of the reasons include production constraints compounded by farmers' socioeconomic and institutional issues and their relationship with the market as a driving force. The study was conducted in six districts (Rolpa, Rukum, Salyan, Pyuthan, Gulmi and Argakhachi) using participatory value chain analysis tools as well as households survey. Total 120 goat producer households survey was done in six districts whereas 30 goat collectors, 30 wholesalers'/regional traders and 30 butchers/retailers surveyed were done. Total sample size of this value chain study of goat sub-sector was 300. It was understood that goat production system in the study area was traditional and the main drawback of value chain is the smaller production volume of goat. When market situation analyzed, it was learnt that there was no systematic marketing system attained by the farmers due to smaller production volume, though the goats contributed almost half of the livestock heads per household (6-8 heads/HH). Mainly the local breeds of goat (Khari) were reared by the farmers with some sorts of crossbreeding with improved breeds such as Jamunapari in Salyan and Rukum. Moreover, the prolificacy of goat was found poor than the average of the Khari goat, where twinning was only 50% as responded by the farmers. Likewise, the grazing system was also of traditional and goats were managed under sedentary system (semi-intensive by almost 60% farmers) and frequent feeding of concentrates in small amount was customary. The natural and traditional grazing habitats such as community forests and pasturelands were used extensively. Almost 40% of the respondents were positive to raise goats in a flock size of 15-25 in a given set of circumstances of support from the agencies, obviously larger flocks might require heavy investments for a level of family income. Later the cost of production and the existing marketing system of goat subsector was analyzed and found that the farmer's profit is dominated by the profit of the t wholesalers and butchers, even though the profit share of farmers was almost one third of the production cost (250 NPR/kg live weight). Total market margin for live weight per kg goat was found about NRP 193 from study area to national market hubs. The market margin/profit gained by the farmers was almost 41%, 20% for local collectors, 60% for regional goat traders/wholesalers and 17% to the regional/national butchers/retailers. There is a need to follow a more integrated approach by investigating challenges and opportunities from production to consumption along a value chain, while also addressing policy and institutional aspects affecting goat production.

**Keywords:** Value chain, Goat sub-sector, Profit, Consumption

## 1. INTRODUCTION

Goats have always been an important livestock species for the world. The global goat population has recently been grown faster than other livestock such as buffalo, cattle, and sheep with a growing shift of the human dietary consumption patterns concerning small ruminants have slowly shifted from mutton to goat meat in the same time period (Dennis *et al.*, 2014).

The vast majority of goats in the world (94%) are found in Asia and Africa, but being a major hub is Asia by population. Nepal is currently ranked eighth in Asia and 19th worldwide in the size of its goat herd with 9.2 million as of 2011 (Dennis *et al.*, 2014). Nepal has one of the highest ratios of livestock per unit of cultivable land in southern Asia. The majority of goats in Nepal are found in the eastern and central regions of the country. However, the number of households with goats has increased in the western half of Nepal over the last decade. While the number of goats per household in Nepal has also increased slightly in recent years, it is still a relatively small number—the majority of households possess 6-8 goats in general.

Nepal had a goat population of 6.97 million in 2003/04 with an annual growth rate of 3.83% until 2012/13 reached to almost 9.78 million (MOAD, 2013). According to the statistics, the total count of goats in Nepal has soared to 14.24 million, marking an increase of more than 4 million in comparison to the numbers recorded in 2012 (MoALD, 2022). At the same period, the total meat production in the country was reached to 2.08 million metric tonnes to 2.95 million metric tonnes with almost 3.96% average annual increment, whilst the annual contribution of goat meat to national average meat production remained almost 18.83% with annual increment of goat meat only by 3% (calculated from MOAD, 2013: Statistical Information on Nepalese Agriculture, 2012/2013).

Nepal has genetic diversity of goat especially adapted to different agro-climatic conditions. There are four main indigenous breeds of goats; namely Chyangra, Sinhal, Khari and Teraigoat. In the hills mostly Kharia breed is commonly kept and also in some forms of crossbreeding with Jamunpari, Barbari and recently with Boer goats. Mostly goats are kept in sedentary system in Nepal.

Goat subsector has been identified as potential poverty reduction livestock sector in Nepal by both government and nongovernmental organizations. Goats form an integral part of the mixed crop/livestock farming system in Nepal. They are a valuable source of income for small resource-poor farmers, particularly women, and act as a safety net and liquid asset in times of need. Furthermore, they make a significant contribution to livelihoods, providing an important source of meat, manure, leather and pack use.

In Nepal, the constraints on goat production, compounded by smallholder producers' lack of access to effective and efficient goat market system, has resulted in slower growth in goat related AGDP. Despite the visible market opportunities in the meat sub-sectors, the country has been unable to take advantage of the situation for various reasons. Some of the reasons include production constraints compounded by farmers' socioeconomic and institutional issues and their relationship with the market as a driving force. Efforts on community development have not shown impact because community members are not sufficiently empowered in terms of intra- and inter-family cohesion and trust in planning household/

community level enterprises and establishing their linkage with the local markets to assure sustainability.

An organized marketing system of live goat is almost non-existent in the country. In contrast, import oriented market channels are emerging. The ever increasing urban need for goat meat is met by imports while the rural goat production system is not adequately motivated. The existing policy environment and practices have encouraged import of live goats; thus its impact has been increasingly felt through non-integration of smallholders' livestock production into the current value chain initiatives. There is an increasing trend of importing live animals for meat to meet the ever increasing urban demands due to low volume of production in national supply chain. The role of each value chain actors of the entire goat value chain namely: input suppliers, farmers and producers, collectors, processors, local and regional distributors, brokers, wholesalers, local retailers, and consumers is specific, complimentary and needs to be based on principles of business to business relationship. However, presently all of these actors are largely working in isolation. Some other persistent problems such as exploitation by brokers, lack of price information, access to incentive markets, poor market infrastructure, and seasonality of markets are the inherent major challenges in improving the livelihoods of smallholder goat farmers. Similarly, service delivery institutions and organisations both public and private are not well connected to the holistic system of goat production and marketing to generate synergy. Organized smallholder institutions with inbuilt capacity of farmers to manage production as well as collection and marketing activities of goat are the need of the present time. The rural Nepalese production economy has a greater comparative and competitive advantage for enhancing goat meat production in view of increasing market demand. For self-sufficiency of meat, the smallholder goat production system must be efficient and competitive. Local community initiatives when brought into the production and marketing sectors of a value chain specifically focusing on meat can help rural farmers increase their family income by strengthening their role in the goat value chain that help channelize urban cash to rural areas for increased income.

The broad objective of the study was to map the existing value chains of live goat and goat meat in Nepal, by assessing its efficiency and identifying strategic interventions for improved efficiency. The identified interventions include improvement in input supply, production functions, marketing, processing entities and also for creating enabling environment at the policy and program levels.

## 2. LITERATURE REVIEW

The Value Chain concept was developed and popularized in 1985 by Michael Porter in "Competitive Advantage," a seminal work on the implementation of competitive strategy to achieve superior business performance (Feller *et al.*, 2006). Porter (1998) suggested that a set of interrelated generic activities (Primary and Support activities) within the organization add value to the service and product that the organization produces. The value chain describes the full range of activities, which are required to bring a product or service from conception, through the different phases of production (involving a combination of physical

transformation and the input of various producer services), delivery to the final consumer, and final disposal after use (Kaplinsky & Morris, 2001, p.4).

Understanding the value chain of agriculture commodity is very much important to plan and execute the program and to contribute the Nepalese overall economic development. As marketing, the relationship between producers and traders is also important in terms of value chain governance in natural resource sector. Massive changes are taking place in the geography of agricultural production in response to the creation of buyer-driven supply chains, governed by non-agricultural sectors and driven by global sourcing and advances in processing and transportation technologies (Vorley, 2001).

Goats are distributed all over the world because of their great adaptability to varying environmental conditions and the different nutritional regimes under which they were evolved and subsequently maintained. They proved useful to human throughout the ages due to their productivity, small size, and non-competiveness with human for food. It is believed that goats were among the first farm animals to be domesticated. As indicated by the archaeological evidence, they have been associated with human in a symbiotic relationship for about 10,000 years (Ensminger and Parker, 1986). Goats are the most prolific domesticated ruminants; farmers are increasingly relying on goats as means of survival and a way of boosting their income (Peacock, 2005). Goats can withstand heat stress and can endure prolonged water deprivation. They have additionally great adaptability to adverse climatic and geophysical conditions, where cattle and sheep cannot survive. Moreover, goats can efficiently utilize poor quality forage; their peculiar feeding habits make it easier to choose diets to meet their requirements. It is also learned that farmers and pastoralists are increasingly relying on goats as means of survival and a way of boosting their income (Peacock, 2005).

The increasing frequency of droughts, with long-term environmental degradation is causing pastoralists to change from cattle or sheep to camels or goats whereas overgrazing makes rangelands increasingly suitable for browsing species such as goats. Goats are considered intelligent, independent, agile, and tolerant to many diseases and parasites, with their characteristics of look after themselves much better than other livestock species. Goat enterprises suits the landless, marginal and small farmers equally since it provides substantial income and helps to create employment to the farm family, including women and children with comparatively low input demanding. Moreover, goat is regarded as the handy source of money in need and is considered as the living bank for marginal and small farmers to supply the immediate need of cash. Indeed, several reasons make goats particularly attractive for poverty reduction and improvement of family food security and livelihood of the poor in developing countries.

There are, however, several challenges associated with increasing meat production including consumer and producers' education, lack of slaughter and processing plants and lack of organized breeding programs, markets and developed marketing channels. The importance of this valuable genetic resource is underestimated and its extent of contribution to the livelihood of the poor is inadequately understood. Goat meat has an immense potential in terms of demand and price.

### 3. RESEARCH METHODOLOGY

#### 3.1 Study site

Both qualitative and quantitative data and variables were collected using participatory learning and action (PLA) approach. Primary data were collected by household survey, focus group discussions (FGDs) at goat producers level, key informant interview (KII) with enabling business environment actors and district level stakeholders and rapid market survey (RMS) appraisal with goat collectors, wholesalers, retailers, butchers and goat consumers in road-corridors of major local market hubs in six districts of Nepal, namely, Rolpa, Rukum, Salyan, Pyuthan, Gulmi and Arghakhachi districts. In addition, secondary data of goat demand and supply scenario at districts level and national level were collected and compiled from Agribusiness Promotion and Statistics Division (ABPSD) under Ministry of Agriculture and Livestock Development (MOALD) as well.

#### 3.2 Source of data

**Value chain sample survey:** A total of 300 samples were collected from survey in six hilly districts for goat value chain covering each 2 pocket areas at 2 closest market corridors or in their vicinity. The survey sampling was as followings:

- *Local producers/farmers: 120 (20 from each village using simple random sampling technique)*
- *Goat collectors: 30 (5 from each district)*
- *Wholesalers: 30 (5 from each district: identified in main the major market hubs)*
- *Goat retailers: 30 (5 from each district)*
- *Consumers: 90 (15 from each district: both in the major survey pockets and the local market hubs)*

***Total sample: 300***

A respondent stratification exercise undertook in each survey village and market areas, prior to the interviews, preferably using participatory tools in FGD and KII in the six districts.

Respondents and villages and market centres was randomly chosen at each district. A semi-structure questionnaire and well-organized checklists were used to collect the information from the selected household.

**Focus group discussions (FGD) and key informant Interview (KII):** At least one focus group discussion per survey site (district level together with the relevant stakeholders) was conducted. Key Informant interview was also be conducted to the key stakeholders for their relevant concern of improvement of goat value chain through livestock improvement program in each district.

#### 3.3 Data Analysis

Various data collected through desk research, and field survey was compiled, processed and analyzed to generate meaningful information. Data collected through household survey was prescreened, coded and compiled and entered in SPSS/Excel software (depending on appropriateness) to prepare fairly clear results. Descriptive statistics used to generate inferences from the data set. Data analyzed and a precise value chain map/graph/table



prepared incorporating/delivering the clear data details on each and every aspects of the study with using the original data observed during field survey, FGD and KII.

## 4. RESULTS AND DISCUSSION

### 4.1 Socio-demographic Characteristics

The average family size in the survey districts were found 6, with family member less than 16 year age of male and female are 1.01 and 0.95 respectively. Similarly, family member in between 16 to 60 years age are 1.98 and 1.83 respectively. However, family member more than 60 years age are very less in numbers with male and female of 0.15 and 0.21.

The average land holding of the farmers were 12.31 ropani<sup>1</sup> in the survey households. Un-irrigated land of 7.6 ropani was found higher than irrigated land of 4.52 ropani. The total cultivable land per household was found 8.8 ropani and on an average people kept 1.01 ropani of land for agro-forestry and 1.6 ropani of land for grass cultivation. But, if we look at the figure in percentage people who kept agro-forest are very less (13.3%) and people who cultivate grass for livestock are very rare (25.8%). This figure indicates the dependency of the people on forest and barren land for pasture availability to their livestock.

### 4.2 Farmers Income Opportunities

Among the sample farmers, 17 (14.2%) of were employed, as they had minimum one member engaged in regular job. Whereas, most of the farmers 103 (85.8%) were dependence on sole agriculture, livestock, business and foreign employment respectively. Maximum number of farmers 32.20% did livestock farming, followed by agriculture 30.35% and service sector 24.14% and remaining were labor (6.97%) and business (4.68%).

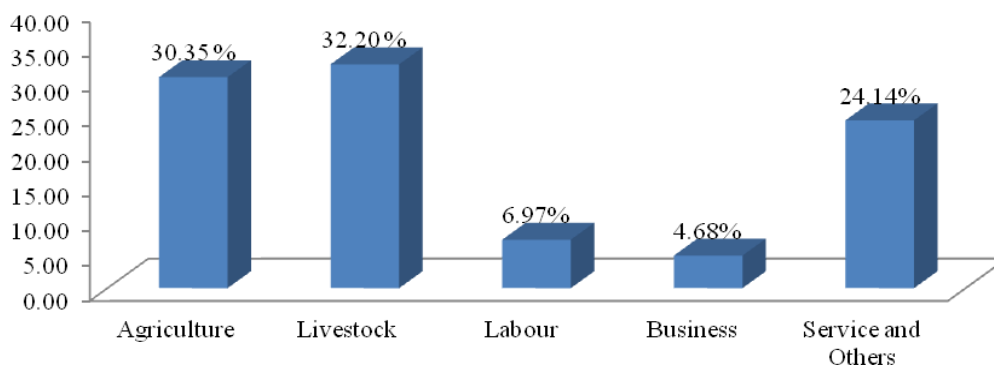


Figure 1: Major occupation of farmers across the study area

### 4.3 Household Livestock Ownership

The average number of livestock heads raised by the farmers was 11 at the range of 1-39 heads recorded in the survey household. Similarly, the average no of goat raised by the farmers were 9 with 1-39 recorded in the survey household. On district basis, Rolpa shows

<sup>1</sup> About 20 ropani = 1 hectare

highest goat numbers per household (15), while Rukum shows lowest number of goat per household (6). The detail of livestock heads and goat heads hold by the surveyed households across the study districts has been presented in Figure 2.

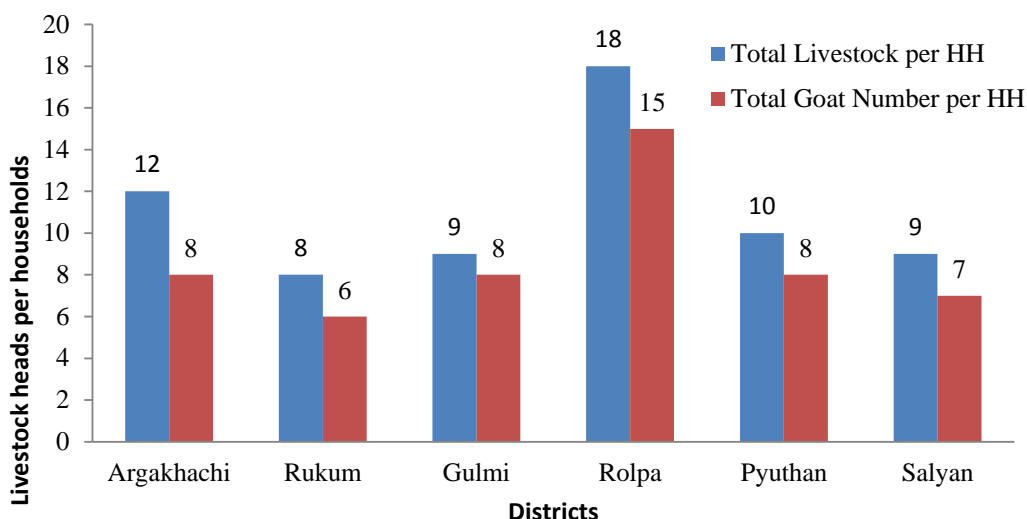


Figure 2: Total Livestock heads and goat holdings by households across the survey areas.

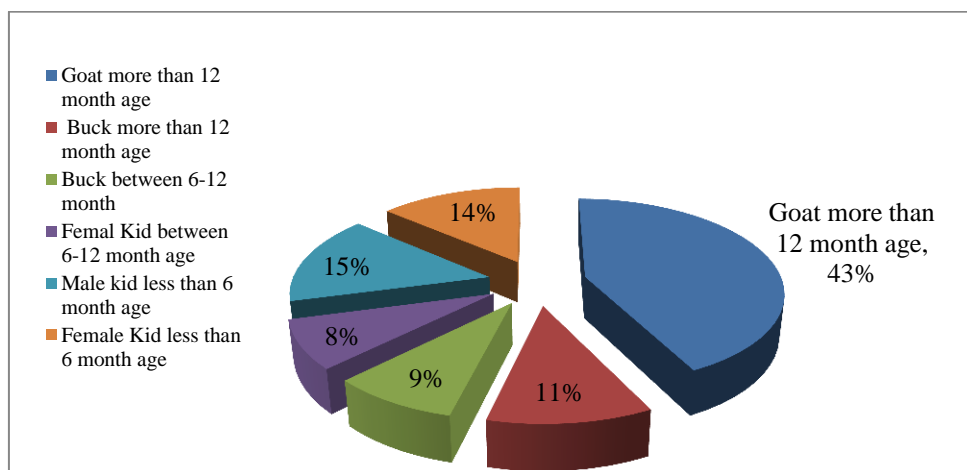


Figure 3: Goat population distribution across the survey sites.

In overall, the goats >12 months of age were almost 45% of the total goat population. Bucks and female kids between 6-12 years of were in similar proportions (8-9%), while both kids less than 6 months of age, and bucks >12 months age were in the range of 10-15% respectively. The distribution of age and sex groups of the goats across the survey sites have been presented in Figure 3.

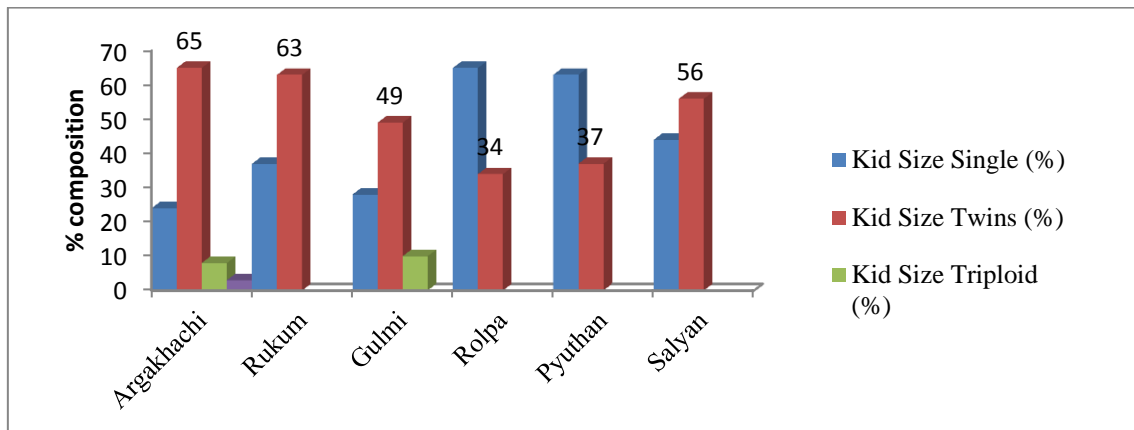


Figure 4: Goat population distribution by districts

If compared at district level, In Arghakhachi, Rukum, Gulmi and Salyan maximum number (55-70%) of goats were producing twins respectively (Figure 4). In case of Arghakhachi 8% of the goats were producing triplets and 3 % quadruplets. Similarly, in Gulmi 10% goats are producing triplets. In Rolpa maximum number of goats are producing single with figure of 66% (Figure 4).

#### 4.4 Farmers Demand for Large Scale Goat Production

When farmers were interviewed about their capacity for goat rearing, most of the farmers 45 (38%) were willing to raise more than 15 adult females provided the best breed and other management services and access to loan to them. Similarly, twenty-five (almost 21%) of the farmers were willing to raise adult female between 10-15 size, 30 (25%) of the farmers were willing to raise goat between 5-10 size and 20 (16%) of the farmers were interested to raise less than 5 adult females. Most of the farmers felt that maintaining the large herd size of goat generates high income enough to sustain their life and household expenses. However, they expressed huge concern on the major problems related to goat management and solution of these problems as a prerequisite to adopt goat as long-term sustainable income source. If management services conditions are met, there is high chance of motivating farmers for large-scale production with the comparative advantage (see Figures 5).



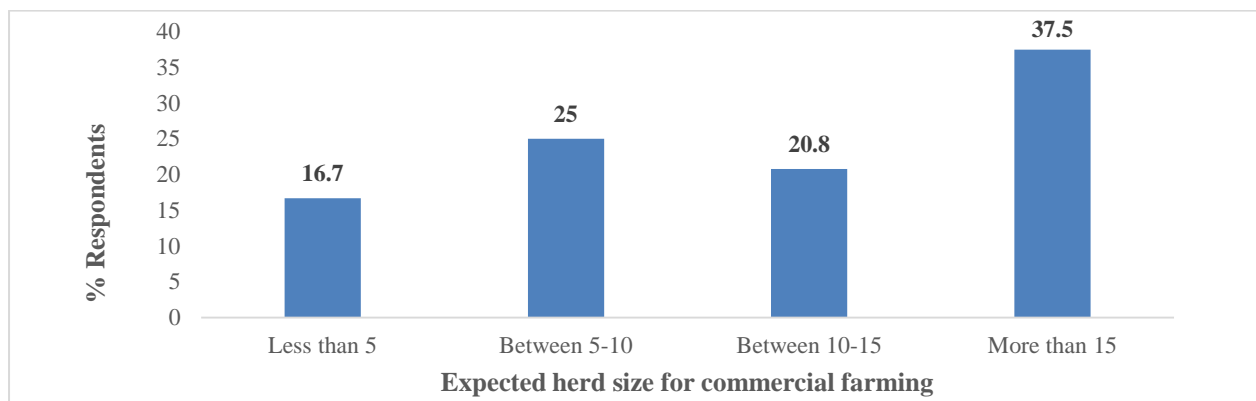


Figure 5: Expected farmers capacity for commercial goat farming in study districts.

#### 4.5 Average Cost Required for Farmers for Different Flock Size of Goats

The cost of production for farmers expected number of goats for commercial scale was calculated for a set of fixed costs and running costs for 6-8 years of production. It came to learn that starting large scale farms without major inputs might result the losses for farmers. Though asking for 4 goats and its economic consequences were conditional in the current situation, starting 7-8 goats with better management options would be ideal to start (see Figures 6). When feeding and labor costs are opportunistically reduced, some proportions of benefits can be well expected.

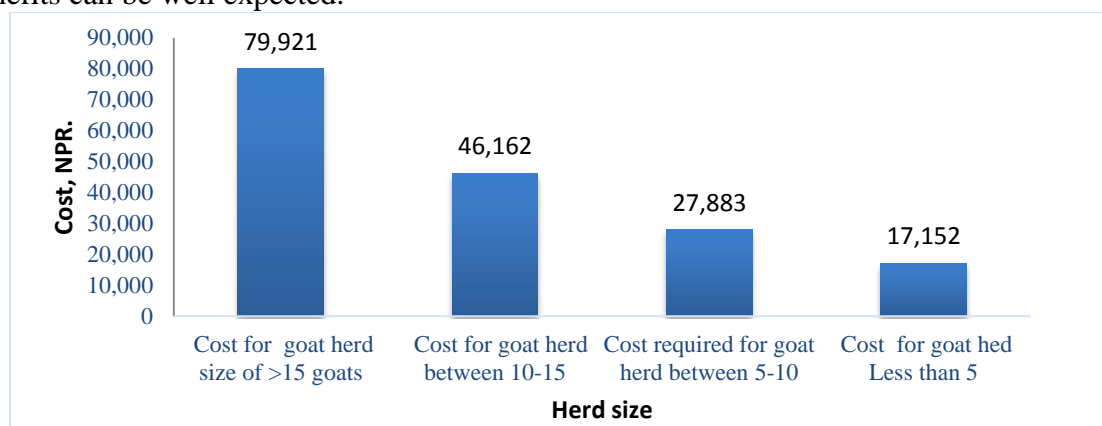


Figure 6: Total cost required for maintain herd of different sizes at survey sites

#### 4.6 Income of Goat from Different Herd Size

The gross revenue from the larger flocks was higher as expected by farmers in the current conditions, however, the benefits could not be obtained from large flocks without proper input deliveries to farmer's level. The average goat herd size for ideal start of a future large-scale farm could be 5-10 per household but that is of excellent breeding capacity improvised with better nutrition and health and housing management.

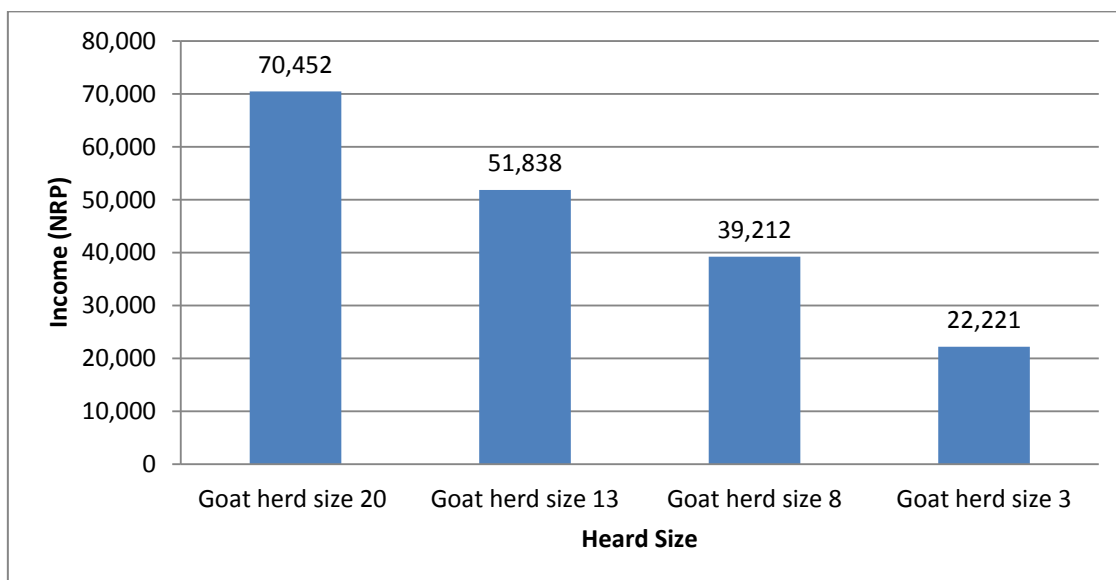


Figure 7: Average annual income from different flock sizes of goat across survey sites

#### 4.7 Cost Benefit Analysis of Goat Farming in Study Area

The average cost of production of per kg live weight goat was NRP<sup>2</sup> 250. Among the cost item, labor cost was found higher (NRP 116 for per kg production) followed by feeds/concentrate (NRP 56.42/kg), shed construction cost (NRP 34.23/kg), cost of kids (NRP 28.7/kg) and NRP 6.94 for per kg of live goat meat production (See Figure 8). It was well observed that the payment to labor and feeding concentrates might control the production cost at farmer's field. So, for a marketable castrated buck of 25 kg can be produced at NPR 6250. The average farmgate price was about NPR 330 per kg live goat meat across the districts that implies to NPR 8250 as farm gate revenue for the other value chain actors. So, farmer can earn NRP 2000 by selling a buck of 25 kg in about 12 months.

<sup>2</sup> 1 US\$ = NRP 132

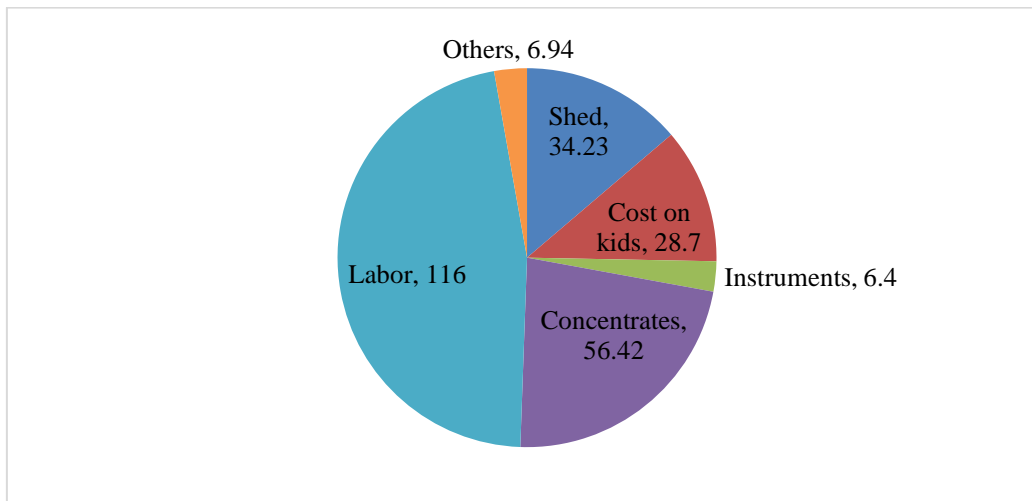


Figure 8: Average cost of production of goat meat in current farmers’ practice

The average profit margin across the district was nearly NPR 80 equivalent to almost 74.4% of the production cost (i.e. NPR 250) per kg of live goat. Sale price for per kg live goat was NPR 330 in the study area. Farm level profit from per kg live goat ranged from NPR 50 (in Pyuthan) to NPR 110 (in Gulmi). Table 1 presents distribution of cost, revenue and profit from live goat (buck) production and local level marketing by surveyed districts.

Table 1: Distribution of cost of production, revenue and profit by surveyed districts

Cost and Revenue	District					
	Rolpa	Rukum	Pyuthan	Argakhachi	Gulmi	Salyan
<b>Cost Items (for 1 kg live goat weight gain):</b>						
Shed	32.24	35.67	38.41	35.67	32.92	30.87
Kid	26.97	29.84	32.14	29.84	27.55	25.83
Instruments	6.01	6.65	7.16	6.65	6.14	5.76
Concentrate (feed)	53.03	58.67	63.19	58.67	54.16	50.77
Labor	109.04	120.64	129.92	120.64	111.36	104.40
Others	7.6892	8.50	9.16	8.50	7.85	7.36
<b>Total Cost (NRP/kg)</b>	<b>235</b>	<b>260</b>	<b>280</b>	<b>260</b>	<b>240</b>	<b>225</b>
<b>Sale Price (NRP/kg live weight)</b>	<b>300</b>	<b>340</b>	<b>330</b>	<b>350</b>	<b>350</b>	<b>310</b>
<b>Profit (NRP/kg live weight)</b>	<b>65</b>	<b>80</b>	<b>50</b>	<b>90</b>	<b>110</b>	<b>85</b>
B:C ratio	1.28	1.31	1.18	1.35	1.46	1.38

Note: Figures in the table indicate cost of production, revenue and profit for one kg of live weight in NRP

#### 4.8. Value Chain Mapping of Goat Sub-Sector

**Goat Producers:** mainly the individual farmers and farmer's cooperatives were identified in the study area. Most of the individual goat producers were associated with farmer groups as well as cooperatives. Rolpa-Pyuthan road corridor farmers were sold their goat to the local level collectors and butchers whereas other road corridors farmers (Gulmi, Argakhanchi and Salyan-Rukum) were sold live goats to the district and regional level goat collectors as well as butchers in local market hubs.

**Goat Collectors:** They were identified as local goat collectors from the rural areas where settlement was dispersed. They worked mainly in the district level. Traders sold live goats in local district level market hubs, regional (mainly in Dang, Nepaljung, Butwal, Bhairawa, Palpa) as well as national end market hubs (mainly in Narayangard, Pokhara and Kathmandu).

**Traders:** They were identified as the regional traders and come to collect goats from the regional cities.

**Wholesalers:** They were identified as the national large traders those used to transport goats to the regional and end hubs on market demands.

**Retailers/ Butchers:** They were identified as the live goat traders from the holding place of the wholesalers in the end hubs. Most of them were recognized as the butchers. The local butchers were also recognized as the local fresh goat meat suppliers in the goat market chain. They used to purchase goats from the farmers directly or from the collectors and used to pay in local price. There was a large variation in animals slaughtered by butchers across study district headquarters ranging from 3-120 *khasi* (*casted he-goats*) per month with nearly NPR 800000 invested as fixed cost, while nearly NPR 6500 weekly profit per butcher. The overhead cost and weekly variable costs were about 1 NPR/ Kg dressed meat (Calculations based on information provided by the butchers across the survey sites).

**End Markets:** Dang and Nepaljung were regional end market hubs for Salyan-Rukhum road corridors whereas Palpa, Butwal, Bhairawa were regional end market hubs for Gulmi and Argakhanchi road corridors in study districts. Pokhara, Narayangard and Kathmandu were the identified national end market hubs for goat sub-sectors in study districts.

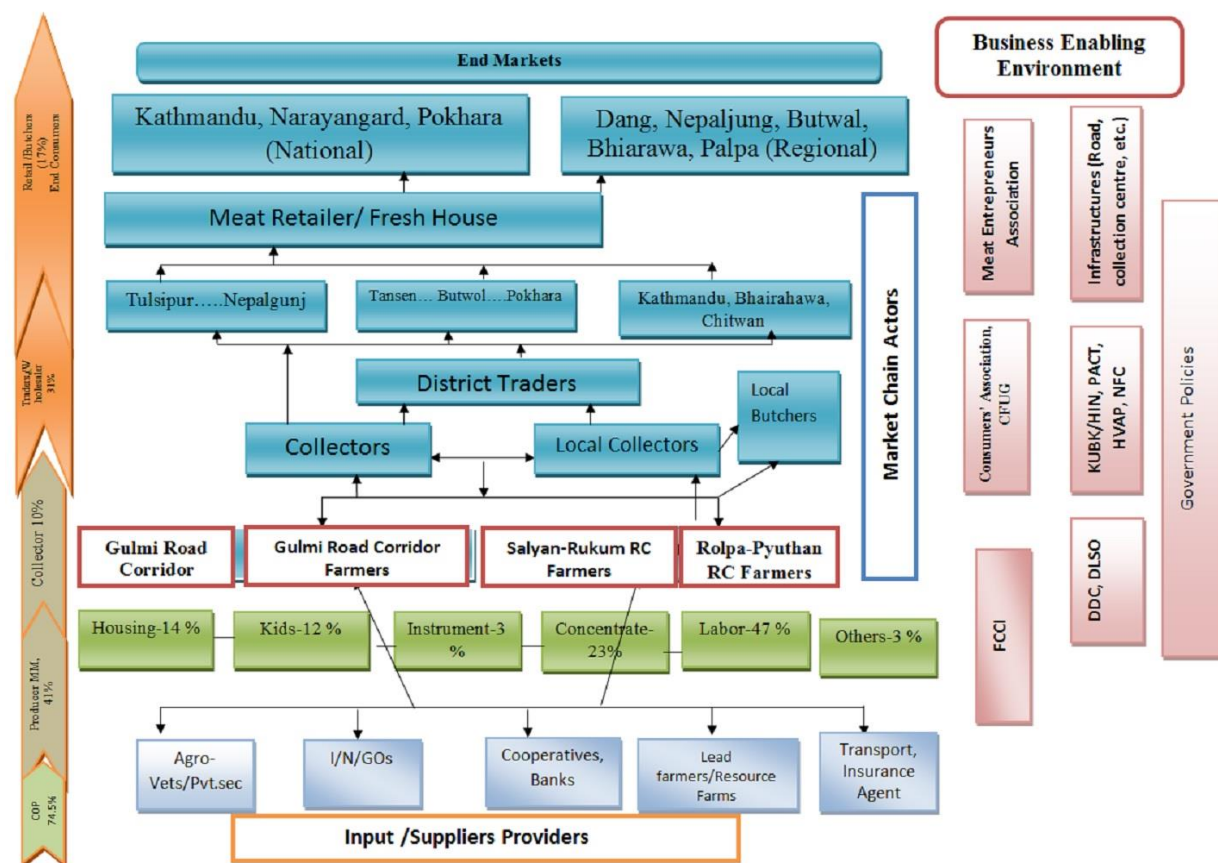


Figure 9: Value chain mapping of goat sub-sector in study hills of Nepal

## 5. CONCLUSION

In this study, the key areas of goat value chain development had been summarized from the data observed from state of production and goat marketing. In general, low volume of production was observed as major drawback of value chain, while there is widened demand of goat meat due to rapid urbanization and might perhaps due to the improved purchasing power of people and their respective health concern on meat consumption. Farmer’s current practice is merely a traditional and has produced low volume of goats. A large-scale production and exports could be expected only when the feeding, breeding and specific ecological niche considered together with health management support activities improvised at rural level.

At present, there is no further expenditure of famers except feeding some concentrates to goats and for time grazing. There are lots of grazing niches available such as community forests and riparian areas, traditional grazing lands and abandoned lands (barren). These resources have been well utilized by farmers for grazing goats and other livestock. However, resource limitations and animal performances should be scientifically evidenced in the future. On the other hand, the value chain of goat sub-sector seemed traditional with low value-added activities and inconstant value chain actors’ involvement in the whole systematic chain

approach. There is a need to follow a more integrated approach by investigating challenges and opportunities from production to consumption along a value chain, while also addressing policy and institutional aspects affecting goat production.

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