

CHAPTER XVI.

PASTORAL PRODUCTION.

§ 1. Initiation and Growth of Pastoral Industry.

1. **Early Statistics.**—In earlier issues of the Year Book will be found a brief reference to the pastoral industry in Australia prior to the year 1860. (See Year Book No. 6, page 330).

2. **Subsequent Statistics.**—While the statistical records of live stock in Australia prior to the year 1860 are somewhat defective, from that year onwards fairly complete particulars are available for most of the States. At the present time, statistics of live stock are collected annually in all the States principally through the agency of the police, but in the years 1885 to 1888 inclusive, and 1893 to 1895 inclusive, these particulars were not collected in South Australia, and similar gaps occur in the Victorian records for the periods 1895 to 1899 inclusive, and 1901 to 1903. In order to obtain totals for Australia for these years the missing numbers have been supplied by interpolation. The results so obtained probably differ but slightly from the actual numbers for the respective years.

3. **Increase in Live Stock.**—Particulars concerning the numbers of each of the principal kinds of live stock in Australia at decennial intervals from 1860 to 1910, and from 1916 onwards in single years, are given in the following table, and are shown continuously in the graphs hereinafter.

During the sixty-one years covered by the table the live stock of Australia increased considerably, horses 465 per cent., cattle 265 per cent., sheep 308 per cent., and pigs 174 per cent. The average annual increases which these aggregates represent are as follows:—Horses 2.89 per cent.; cattle 2.15 per cent.; sheep 2.33 per cent.; and pigs, 1.75 per cent.

LIVE STOCK.—AUSTRALIA, 1860 TO 1921.

Year.	Horses.	Cattle.	Sheep.	Pigs.
1860	431,525	3,957,915	20,135,286	351,096
1870	716,772	4,276,326	41,593,612	543,388
1880	1,061,078	7,523,000	62,176,027	815,776
1890	1,521,588	10,299,913	97,881,221	891,138
1900	1,609,654	8,640,225	70,602,995	950,349
1910	2,165,866	11,744,714	92,047,015	1,025,850
1916	2,436,148	10,459,237	76,668,604	1,006,763
1917	2,497,903	11,829,138	84,965,012	1,169,365
1918	2,527,149	12,738,852	87,086,236	913,902
1919	2,421,201	12,711,067	75,554,082	695,968
1920	2,415,510	13,499,737	77,897,555	764,406
1921	2,438,182	14,441,309	82,226,470	960,385

4. **Fluctuations.**—The increases referred to, however, have not been continuous, marked fluctuations having taken place during the period, mainly on account of the droughts which have from time to time left their impress on the pastoral history of Australia. These were in evidence in 1869, 1877, 1884, 1895, and subsequent years, 1902, 1908, 1912, 1914–15, 1918 to 1920, and again in 1922–23, in which years the abnormal mortality amongst stock greatly reduced the existing numbers.

As an offset to these visitations, the process of re-stocking Australia is generally completed in a few years by the large increases which occur in the good seasons invariably supervening on the dry ones, thus bearing convincing testimony to the extraordinary recuperative powers of the country.

The years in which the numbers of live stock attained their maxima are as follows:—Horses, 1918, 2,527,149; cattle, 1921, 14,441,309; sheep, 1891, 106,421,068; and pigs, 1917, 1,169,365.

5. **Live Stock in Relation to Population.**—The number of each kind of live stock per head of the population of Australia has varied during the past sixty one years in the manner shown in the succeeding table :—

LIVE STOCK PER HEAD OF POPULATION—AUSTRALIA, 1860 TO 1921.

Year.	Horses.	Cattle.	Sheep.	Pigs.	Year.	Horses.	Cattle.	Sheep.	Pigs.
1860	0.38	3.45	17.58	0.31	1916	0.49	2.12	15.53	0.20
1870	0.43	2.60	25.24	0.33	1917	0.50	2.36	16.97	0.23
1880	0.48	3.37	27.87	0.37	1918	0.49	2.48	16.99	0.18
1890	0.48	3.27	31.06	0.28	1919	0.45	2.38	14.15	0.13
1900	0.43	2.29	18.75	0.25	1920	0.44	2.49	14.35	0.14
1910	0.49	2.65	20.80	0.23	1921	0.44	2.61	14.86	0.17

Considered in relation to population the most noticeable variations have been the largely reduced numbers of sheep and pigs in recent years, the reductions amounting to about one-half of the earlier figures. The number of cattle has also declined, though an upward trend has been in evidence since 1916, while the position of horses has remained stationary.

6. **Live Stock in Relation to Area.**—The numbers of live stock per square mile in the several States and Territories of Australia are given in the following table :—

LIVE STOCK PER SQUARE MILE.

States and Territories.	Date.	Horses.	Cattle.	Sheep.	Pigs.
New South Wales ..	30th June, 1922 ..	2.16	11.43	119.66	1.24
Victoria ..	1st March, 1922 ..	5.65	19.92	140.25	2.63
Queensland ..	31st Dec., 1921 ..	1.11	10.51	27.45	0.22
South Australia ..	30th June, 1922 ..	0.70	1.10	16.46	0.23
Western Australia ..	31st Dec., 1921 ..	0.18	0.92	6.67	0.06
Tasmania ..	1st March, 1922 ..	1.47	8.27	59.17	1.90
Northern Territory ..	30th Dec., 1921 ..	0.08	1.08	0.01	0.00
Fed. Cap. Territory ..	30th June, 1922 ..	1.38	8.82	161.37	0.36
Total ..	1921-22 ..	0.82	4.85	27.64	0.32

7. **Minor Classes of Live Stock.**—The numbers of minor classes of live stock returned for 1921-22 were as follows:—Goats, 240,908; camels, 11,738; mules and donkeys, 15,134; and ostriches, 780. Of these, goats and mules were most numerous in Queensland; camels and donkeys in Western Australia; and ostriches in South Australia. In the raising of goats, considerable attention has in recent years been devoted to the angora goat and its product (mohair), and about 13,000 angora goats are included in the total of 240,908 goats shown above. Of these, 3,868 were in New South Wales, 2,007 in Western Australia, and 4,248 in Queensland, while the quantity of mohair produced in the latter State in 1921 was set down at 2,895 lbs., and the number of skins placed on the market was returned as 517.

8. **Net Exports of Principal Pastoral Products.**—The quantities by which the exports of the principal pastoral products of Australia exceeded the imports for the years 1917-18 to 1921-22 are as follows :—

NET EXPORTS OF PASTORAL PRODUCTS.—AUSTRALIA, 1917-18 TO 1921-22.

Products.	Unit of Quantity.	1917-18.	1918-19.	1919-20.	1920-21.	1921-22.
QUANTITIES.						
Animals (living)—						
Cattle	No.	1,117	644	3,133	4,396	9,110
Horses	"	23,876	8,686	5,787	8,195	1,798
Sheep	"	9,080	18,901	21,601	19,307	36,111
Bones	cwt.	20,363	25,669	29,198	24,160	21,718
Glue Pieces and Sinews	"	11,015	3,878	8,158	-3,020	4,987
Glycerine	lb.	(a)	1,633,510	-21,745	-854,254	19,348
Hair	"	324,523	402,869	600,595	100,434	-126,037
Hoofs	cwt.	8,618	10,000	11,382	7,580	10,615
Horns	"	(a)	(a)	(a)	(a)	(a)
Meats—						
Frozen Beef	lb.	180,222,185	119,938,442	120,939,750	179,618,140	124,158,191
Frozen Mutton and Lamb	"	19,174,231	59,672,405	243,957,427	54,392,784	91,712,280
Frozen Rabbits and Hares	pair	13,164,307	5,132,983	9,622,150	3,925,004	4,857,404
Frozen, Other	lb.	8,286,035	12,329,539	11,397,792	7,901,468	6,676,605
Potted and Extract of	"	(a)	(a)	(a)	(a)	(a)
Preserved in Tins, etc.	"	43,036,310	65,118,256	47,550,045	8,296,500	9,133,860
Other (excluding Bacon and Ham)	"	261,301	424,777	755,141	482,317	344,167
Sausage Casings	"	(a)	(a)	(a)	(a)	(a)
Skins—						
Hides	No.	15,873	26,819	540,415	-8,317	80,415
Sheep	"	2,907,431	6,663,978	10,143,952	5,117,431	6,780,522
Rabbit and Hare	cwt.	71,990	117,569	127,452	49,427	74,224
Other (including Undressed Furs)	No.	(a)	(a)	(a)	(a)	(a)
Tallow	cwt.	345,849	870,950	712,307	524,220	893,772
Wool—						
Greasy	lb.	243,784,651	457,995,701	552,307,700	417,647,343	710,591,430
Scoured	"	62,865,373	106,313,411	84,900,446	61,525,697	102,346,835
Tops	"	4,571,357	2,822,578	6,148,118	6,598,681	6,200,505

NOTE.—The minus sign — signifies net imports. (a) Quantity not available.

The values of the net exports for the same five years are furnished in the next table, and amount to no less a total than £271,216,045 for the period, or an average of £54,243,209 per annum, of which wool represents 70 per cent. Meats, skins, and tallow rank next in order of importance.

NET EXPORTS OF PASTORAL PRODUCTS.—AUSTRALIA, 1917-18 TO 1921-22.

Products.	1917-18.	1918-19.	1919-20.	1920-21.	1921-22.
VALUES.					
Animals (living)—	£	£	£	£	£
Cattle	-10,993	3,567	-23,855	30,350	53,274
Horses	453,616	161,533	117,739	137,497	-1,148
Sheep	15,049	35,007	57,854	140,975	36,921
Bones	21,806	27,156	31,534	21,839	19,610
Glue Pieces and Sinews	15,196	6,904	15,340	302	7,883
Glycerine	41,256	58,073	1,351	-39,374	1,516
Hair	21,243	29,335	66,943	28,416	6,736
Hoofs	7,848	11,091	14,526	8,180	7,120
Horns	13,300	18,474	52,383	29,009	34,418
Meats—					
Frozen Beef	3,697,957	2,471,136	2,474,904	3,819,094	1,867,681
Frozen Mutton and Lamb	452,627	1,298,086	5,482,263	1,578,634	2,139,537
Frozen Rabbits and Hares	985,190	308,965	762,936	432,745	407,143
Frozen, Other	199,847	381,780	305,948	190,975	128,451
Potted and Extract of	224,464	328,233	99,599	9,049	-49,636
Preserved in Tins, etc.	2,308,989	3,771,373	2,778,503	380,694	324,275
Other (excluding Bacon and Ham)	7,655	15,380	37,345	16,741	10,852
Sausage Casings	-29,089	101,490	212,427	-43,160	128,127
Skins—					
Hides	211,449	156,084	1,089,731	-113,202	122,471
Sheep	808,782	1,921,411	2,585,171	1,228,012	1,305,223
Rabbit and Hare	1,155,824	1,314,366	3,670,791	968,972	784,346
Other (including Undressed Furs)	276,537	313,472	2,268,748	715,656	288,633
Tallow	886,128	2,167,728	2,855,602	1,347,400	1,440,683
Wool—					
Greasy	16,981,347	31,477,707	38,414,608	25,298,176	38,970,130
Scoured	6,094,040	10,351,553	9,169,288	6,426,167	7,795,146
Tops	1,510,799	935,212	2,957,679	2,049,588	1,207,048
Total Values	36,350,876	57,665,116	75,499,858	44,663,755	57,036,440

NOTE.—The minus — sign signifies net imports.

§ 2. Horses.

1. **Suitability of Australia for Horse-breeding.**—From the earliest times the suitability of the climate and pastures of Australia for the production of serviceable breeds of horses has been fully recognized. By the importation of high-class sires, and the careful selection of breeding mares, these natural advantages are utilized to the fullest extent, all classes of horses being bred. As a consequence of this combination of advantages, the Australian horse, whether of the heavy draught, medium weight, or light saddle and carriage variety, compares more than favourably with the product of other lands. The Australian horse has been found suitable for the army in India, and large numbers are obtained annually for remount purposes. During the recent war Australian horses were found to be well adapted for all purposes, especially in Palestine.

2. **Distribution throughout Australia.**—As regards numbers, the State of New South Wales, the earliest settled of the group, established a lead, which it retained till the year 1914, when it gave place to Queensland, where rapid progress had been in evidence during the previous decade. New South Wales regained the lead during the next three seasons, but Queensland again replaced the latter State in 1919, and has strengthened its position during the past three seasons. Particulars for the several States during the past five years are as follows:—

HORSES—NUMBER, 1917 TO 1921.

Year.	N.S.W. (b)	Vic. (a)	Q'land.	S. Aust. (b)	W. Aust.	Tas. (a)	N.T.	F.C.T. (b)	Total.
1917	740,806	514,061	731,977	262,840	178,151	42,396	26,231	1,441	2,497,903
1918	721,302	523,788	758,632	269,255	180,094	41,221	31,436	1,421	2,527,149
1919	660,751	513,500	730,326	264,901	174,919	39,452	35,839	1,513	2,421,201
1920	661,846	487,503	741,024	268,187	178,664	39,117	37,837	1,332	2,415,510
1921	668,501	496,124	746,281	267,639	180,334	38,439	39,565	1,299	2,438,182

(a) 1st March year following.

(b) 30th June year following.

The number of horses in Australia from 1860 onwards, may be ascertained from the graph hereinafter.

3. **Proportions in the Several States and Territories.**—The percentages of the number of horses in the several States and Territories on the total for Australia for the past five years are as follows:—

HORSES.—PERCENTAGE IN EACH STATE, 1917 TO 1921.

Year.	N.S.W.	Vic.	Q'land.	S. Aust.	W. Aust.	Tas.	N.T.	F.C.T.	Total.
	%	%	%	%	%	%	%	%	%
1917 ..	29.64	20.57	29.33	10.52	7.13	1.70	1.05	0.06	100.00
1918 ..	28.53	20.72	30.05	10.65	7.12	1.63	1.24	0.06	100.00
1919 ..	27.29	21.21	30.16	10.94	7.23	1.63	1.48	0.06	100.00
1920 ..	27.40	20.18	30.68	11.10	7.40	1.62	1.57	0.05	100.00
1921 ..	27.42	20.35	30.61	10.98	7.40	1.57	1.62	0.05	100.00

The relative changes in distribution are insignificant, the only alteration during the last five years being a decrease of 2.22 per cent. in New South Wales, occasioned by slight increases in Queensland, South Australia, Western Australia and Tasmania.

4. **Relation to Population.**—In proportion to population, horses are much more numerous in the Northern Territory than in any other of the principal divisions of Australia. Queensland is next in order, while Tasmania has the smallest number of

horses per head. The number of horses per head of population has declined in all the States since 1917. Particulars for the past five years are as follows:—

HORSES.—NUMBER PER HEAD OF POPULATION, 1917 TO 1921.

Year.	N.S.W.	Victoria.	Q'land.	S. Aust.	W. Aust.	Tas.	N. Ter.	Fed. Cap. Ter.	All States.
1917 ..	0.38	0.36	1.06	0.58	0.58	0.21	5.46	0.58	0.50
1918 ..	0.36	0.36	1.08	0.57	0.58	0.20	6.78	0.60	0.49
1919 ..	0.32	0.34	0.99	0.54	0.53	0.19	7.88	0.68	0.45
1920 ..	0.31	0.32	0.99	0.54	0.54	0.18	9.48	0.52	0.44
1921 ..	0.31	0.32	0.97	0.53	0.54	0.18	10.59	0.45	0.44

5. **Comparison with other Countries.**—The number of horses in some of the leading horse-breeding countries of the world, according to the latest available returns, are as follows:—

HORSES.—NUMBER IN PRINCIPAL COUNTRIES.

Country.	Date.	Number of Horses (,000 omitted.)	Country.	Date.	Number of Horses (,000 omitted.)
Russia (a) ..	1920	24,622	Sweden	1919	716
U.S. of America ..	1922	20,559	Union of South Africa ..	1920	690
Argentine Republic ..	1920	9,293	Turkey	1919	630
Brazil	1916	6,065	Denmark	1921	598
China	1916	4,401	Czecho-Slovakia	1920	581
Canada	1921	3,814	Uruguay	1916	555
Germany	1922	3,648	Colombia	1915	526
Poland	1921	3,187	Paraguay	1918	490
France	1921	2,706	Chile	1919	392
Australia	1921	2,438	Netherlands	1921	364
United Kingdom ..	1921	2,165	New Zealand	1922	332
British India	1920	1,699	Latvia	1922	303
Rumania	1921	1,687	Austria	1918	297
Japan	1919	1,480	India (Native States) ..	1920	277
Jugo-Slavia	1921	1,059	Finland	1919	273
Italy	1918	990	Java	1918	270
Mexico	1920	929	Philippine Islands ..	1919	255
Cuba	1921	859	Belgium	1922	230
Spain	1921	722	Norway	1918	221
Hungary	1920	718	Greece	1920	201

(a) Including Caucasus and Siberia.

6. **Oversea Trade in Horses.**—(i) *Exports.* Australia's export trade in horses is fairly considerable, though somewhat fluctuating. During the past five years it has varied in number between 24,172 in 1917-18 and 2,075 in 1921-22, and in value between £502,557 in the former and £68,234 during the latter year. The total number of horses exported during the five years amounted to 49,320, valued at £1,213,905, or equal to an annual average of 9,864 for £242,781. The average export price for the period was £24 12s. 3d. More than 88 per cent. of the horses exported went to India, where they are largely used for remount purposes.

(ii) *Imports.* The number of horses imported into Australia is comparatively small, consisting mainly of valuable animals introduced for breeding purposes, principally from the United Kingdom and New Zealand. The average value per head of the horses imported during the last five years was £250 3s. 5d., as compared with £24 12s. 3d. per head for the exports for the same period. The average number imported per annum was, however, only 196, and the average annual value, £48,934. The following table gives the imports, exports, and net exports of horses during each of the years from 1917-18 to 1921-22:—

HORSES.—IMPORTS AND EXPORTS, AUSTRALIA, 1917-18 TO 1921-22.

Year.	Imports.		Exports.		Net Exports.	
	No.	Value.	No.	Value.	No.	Value.
		£		£		£
1917-18	296	48,941	24,172	502,557	23,876	453,616
1918-19	146	27,821	8,832	189,354	8,686	161,533
1919-20	152	49,078	5,939	166,817	5,787	117,739
1920-21	107	49,446	8,302	186,943	8,195	137,497
1921-22	277	69,382	2,075	68,234	1,798	- 1,148

NOTE.—The minus sign — signifies net imports.

§ 3. Cattle.

1. **Purposes for which Raised.**—In all the States, cattle-raising is carried out on a more or less extensive scale, the main object in certain districts being the production of stock suitable for slaughtering purposes, and in others the raising of profitable dairy herds. The great impetus which the development of the export trade in Australian butter gave to the dairying industry led to a considerable increase in numbers and improvement in quality of the dairy herds of Victoria, New South Wales, and Southern Queensland in particular, the portion of Australia in the temperate zone being the best adapted to this industry. On the other hand, by far the finest specimens of beef-producing cattle are those raised in the tropical districts, i.e., in the northern parts of Queensland, in the Northern Territory, and in the Kimberley districts in the north of Western Australia.

2. **Distribution throughout Australia.**—Until 1880 New South Wales occupied the leading position as a cattle-raising State, but in that year Queensland took first place, which it has since maintained. The graph herewith shows a rapid increase in the number of cattle in Australia up to the year 1894, when 12,311,617 head were depastured. From 1895 onwards, however, the effects of droughts and the ravages of tick fever reduced the number to 7,062,742 in 1902. Following the disastrous drought which terminated in the latter year, the herds were gradually built up, and despite recurring droughts, they continued to increase in recent years until the maximum number of 14,441,309 cattle was attained in 1921.

The numbers of cattle in the several States and Territories during each of the last five years are as follows:—

CATTLE.—NUMBER, 1917 TO 1921.

Year.	N.S.W. (b)	Victoria. (a)	Q'land.	S. Aust. (b)	W. Aust.	Tas. (a)	Nor. Ter.	Fed. Cap. Ter. (b)	Total.
1917	3,148,309	1,371,049	5,316,558	313,245	927,086	107,938	541,545	13,408	11,829,138
1918	3,271,782	1,596,544	5,786,744	342,768	943,847	218,234	570,039	8,894	12,738,852
1919	3,075,954	1,631,120	5,940,433	349,562	880,644	214,442	610,534	8,378	12,711,067
1920	3,367,880	1,575,159	6,455,067	376,399	849,803	208,202	659,840	7,387	13,499,737
1921	3,538,240	1,750,369	7,047,370	419,197	893,108	216,704	568,031	8,290	14,441,309

(a) 1st March year following. (b) 30th June year following.

3. **Proportion in each State.**—Percentages showing the relative importance of the various cattle-breeding States during the years 1917 to 1921 are given hereunder:—

CATTLE.—PERCENTAGE IN EACH STATE, 1917 TO 1921.

Year.	N.S.W.	Victoria.	Q'land.	S. Aust.	W. Aust.	Tas.	Nor. Ter.	Fed. Cap. Ter.	Total.
	%	%	%	%	%	%	%	%	%
1917 ..	26.62	11.59	44.94	2.65	7.84	1.67	4.58	0.11	100.00
1918 ..	25.68	12.53	45.43	2.69	7.41	1.71	4.48	0.07	100.00
1919 ..	24.20	12.83	46.73	2.75	6.93	1.69	4.80	0.07	100.00
1920 ..	24.95	11.67	47.82	2.79	6.29	1.54	4.89	0.05	100.00
1921 ..	24.50	12.12	48.80	2.90	6.19	1.50	3.93	0.06	100.00

Queensland contains within its borders nearly one half of the cattle-herds of Australia. During the past five years substantial gains in numbers have increased its percentage to 48.80, or 4 per cent. more than in 1917. This increase has been won mainly at the expense of the next most important State, New South Wales, where, although considerable additions have been made, the rate of increase has not been as high as in the northern State.

4. **Relation to Population.**—The number of cattle per head of population differs considerably in the several States, as may be seen from the following table :—

CATTLE.—NUMBER PER HEAD OF POPULATION, 1917 TO 1921.

Year.	N.S.W.	Victoria.	Q'land.	S. Aust.	W. Aust.	Tas.	Nor. Ter.	Fed. Cap. Ter.	All States.
1917 ..	1.62	0.97	7.73	0.70	3.02	1.00	112.75	5.42	2.36
1918 ..	1.64	1.11	8.20	0.73	3.05	1.08	122.85	3.77	2.48
1919 ..	1.49	1.09	8.05	0.72	2.69	1.02	134.27	3.77	2.38
1920 ..	1.60	1.03	8.58	0.76	2.57	0.98	165.29	2.86	2.49
1921 ..	1.65	1.12	9.15	0.83	2.66	0.99	152.00	2.84	2.61

A satisfactory increase in the ratio of cattle to population has taken place in Australia since 1917, all the cattle-rearing States, with the exception of Western Australia, contributing to this favourable position.

5. **Comparison with other Countries.**—In the following comparison of the herds of Australia with those of some of the principal cattle-raising countries of the world, the latest available figures have been inserted in each case :—

CATTLE.—NUMBER IN VARIOUS COUNTRIES.

Country.	Date.	No. of Cattle (,000 omitted.)	Country.	Date.	No. of Cattle (,000 omitted.)
British India (a) ..	1920	127,119	Java	1918	3,040
U.S. of America ..	1922	66,352	Colombia	1915	3,035
Russia (b)	1920	37,873	Siam	1922	2,864
Brazil	1916	28,926	Denmark	1921	2,591
Argentine Republic ..	1920	27,392	Kenya Colony ..	1920	2,570
India (Native States)(a)	1920	16,400	Sweden	1919	2,551
Germany	1922	16,309	Chile	1919	2,163
China	1916	15,973	Mexico	1920	2,163
Australia	1921	14,530	Hungary	1920	2,148
France	1921	13,343	Austria	1920	2,114
United Kingdom ..	1921	11,893	Venezuela	1920	2,078
Canada	1921	10,206	Netherlands ..	1921	2,063
Union of South Africa	1921	8,557	Rhodesia	1921	1,763
Poland	1921	7,861	Ceylon	1919	1,599
Uruguay	1916	7,802	Belgium	1922	1,517
Madagascar	1921	7,829	Korea	1920	1,490
Italy	1918	6,240	Indo-China	1916	1,448
Rumania	1921	5,521	Switzerland ..	1921	1,425
Paraguay	1918	5,500	Japan	1919	1,345
Jugo-Slavia	1921	4,834	Western Morocco	1921	1,300
Cuba	1921	4,771	Upper Senegal & Niger	1918	1,299
Czecho-Slovakia ..	1920	4,212	Italian Somaliland	1920	1,246
Tanganyika Territory ..	1912	3,994	Finland	1920	1,812
Turkey	1919	3,740	Norway	1918	1,050
Spain	1921	3,718	French Sudan ..	1921	1,025
New Zealand	1922	3,323	Algeria	1915	1,022
French West Africa ..	1921	3,313	Peru	1917	1,000

(a) Including buffalo calves.

(b) Including Caucasus and Siberia.

6. Imports and Exports of Cattle.—Although the various products of the cattle-raising industry bulk largely in the export trade of Australia, the export of live cattle has never been considerable. The number of cattle imported is also small, consisting, as in the case of horses, mainly of valuable animals for breeding. Details are as follows:—

CATTLE.—IMPORTS AND EXPORTS, AUSTRALIA, 1917-18 TO 1921-22.

Year.	Imports.		Exports.		Net Exports.	
	No.	Value.	No.	Value.	No.	Value.
		£		£		£
1917-18 ..	222	23,570	1,339	12,577	1,117	-10,993
1918-19 ..	66	3,373	710	6,940	644	3,567
1919-20 ..	337	55,656	3,470	31,801	3,133	-23,855
1920-21 ..	127	10,979	4,523	41,329	4,396	30,350
1921-22 ..	108	10,769	9,218	64,043	9,110	53,274

NOTE.—The minus sign — signifies net imports.

The average value of the cattle imported during the last five years was £121 6s. 8d. per head, while the average value of the cattle exported during the same period was £8 2s. 9d. As stated previously, the imported cattle were required principally for stud purposes.

7. Cattle Slaughtered.—The number of cattle slaughtered during each of the years 1917 to 1921 is given hereunder:—

CATTLE (INCLUDING CALVES) SLAUGHTERED, 1917 TO 1921.

Year.	N.S.W. (a)	Victoria.	Q'land.	S. Aust. (a)	W. Aust.	Tas.	N. Ter.	Fed. Cap. Ter. (a)	Total.
1917	377,936	217,480	582,954	69,789	50,781	23,521	22,911	87	1,345,459
1918	437,046	223,340	498,737	73,148	48,707	22,419	31,511	141	1,335,049
1919	593,859	362,475	461,197	85,978	55,056	15,753	23,286	138	1,597,742
1920	525,981	374,545	449,103	90,944	68,055	27,468	1,330	74	1,537,500
1921	631,699	331,707	499,992	95,323	54,640	33,566	2,445	90	1,649,462

(a) For year ended 30th June of year following.

8. Production and Consumption of Beef.—The production of beef in Australia during the years 1914-15 to 1920-1921 was calculated at 764,489,000 lbs. per annum. Of this quantity, local requirements absorbed 558,487,000 lbs., or more than 73 per cent., leaving a balance of about 27 per cent., which was exported as frozen and canned beef. The annual consumption of beef per head of population in Australia averaged 109.68 lbs. compared with 79.85 lbs. in the United States of America, and 58.30 lbs. in the United Kingdom.

9. Export of Beef Preserved by Cold Process.—A large export trade in beef preserved by cold process is carried on by Australia in normal times, mainly with the United Kingdom, Egypt, and the Philippine Islands. The quantities so exported during the five years 1917-18 to 1921-22 were as follows:—

BEEF PRESERVED BY COLD PROCESS.—EXPORTS, AUSTRALIA, 1917-18 TO 1921-22.

Country to which Exported.	1917-18.	1918-19.	1919-20.	1920-21.	1921-22.	Total for 5 years.
QUANTITY.						
	lbs.	lbs.	lbs.	lbs.	lbs.	lbs.
United Kingdom ..	145,300,631	47,056,554	105,725,679	156,316,163	108,671,867	568,070,894
Egypt ..	30,359,072	68,681,634	6,616,637	10,202,633	1,904,187	117,763,563
Philippine Islands ..	1,368,713	1,994,336	2,928,722	2,479,724	8,093,851	16,865,346
Straits Settlements ..	1,535,005	1,480,201	2,366,035	3,305,162	2,392,991	11,079,394
Hawaiian Islands ..	502,067	489,640	2,104,769	2,437,135	554,698	6,088,309
Italy ..				3,096,341		3,096,341
Hong Kong ..	98,058	75,791	467,974	849,904	610,785	2,102,512
Ceylon ..	203,823	60,854	405,347	530,636	322,010	1,522,670
United States ..		40,086	301,673	133,304	71,615	546,678
Other Countries ..	881,932	111,021	162,075	291,477	1,545,340	2,991,854
Total ..	180,240,301	119,989,517	121,078,911	179,642,479	124,167,353	725,127,561

BEEF PRESERVED BY COLD PROCESS.—EXPORTS, AUSTRALIA—continued.

Country to which Exported.	1917-18.	1918-19.	1919-20.	1920-21.	1921-22.	Total for 5 years.
VALUE.						
	£	£	£	£	£	£
United Kingdom ..	2,976,301	958,164	2,180,527	3,302,283	1,616,075	10,983,350
Egypt ..	610,627	1,416,713	133,583	207,643	24,431	2,397,997
Philippine Islands ..	31,449	44,225	65,331	56,032	133,696	330,733
Straits Settlements ..	31,819	33,284	53,363	71,099	44,687	234,252
Hawaiian Islands ..	17,968	14,058	62,818	77,784	7,280	179,908
Italy ..				62,575		62,575
Hong Kong ..	2,032	1,704	10,426	18,553	11,117	43,832
Ceylon ..	4,582	2,130	11,539	13,478	6,111	37,840
United States ..		1,023	7,422	3,429	1,130	13,004
Other Countries ..	17,915	2,485	4,239	6,965	23,400	55,004
Total	3,698,693	2,472,786	2,479,248	3,819,841	1,867,927	14,338,495

During the five years under review the United Kingdom has been Australia's largest customer for frozen beef and has taken more than 76 per cent. of the total shipments. Egypt, the Philippine Islands and Straits Settlements ranked next in order of importance. The exporting States during 1921-22 were:—Queensland, 108,336,879 lbs., valued at £1,634,227; New South Wales, 10,704,871 lbs., valued at £153,338; Western Australia, 2,478,848 lbs., valued at £39,400; Victoria, 2,033,517 lbs., valued at £33,046; and South Australia, 613,238 lbs., valued at £7,916.

10. Beef Subsidy.—The prices for frozen beef ruling in England early in 1922 were so low that it became unprofitable to export Australian beef. A succession of good seasons had stocked the country to capacity, and the failure of the export treatment works to absorb the surplus greatly depressed the beef industry. In order to assist cattle growers the Commonwealth Government passed the Meat Export Bounties Act in September, 1922, which provided for the payment of a subsidy of $\frac{1}{4}$ d. per lb. on all frozen or canned beef exported or placed in cool stores for export, and 10s. per head on live cattle exported for slaughter, from April to December, 1922. The granting of the subsidy was made conditional on reductions of $\frac{1}{4}$ d. per lb. being effected in both the cost of treating and of shipping the meat. While the amount of the bounty was small, it gave an acceptable measure of relief to the cattle industry. Many of the works were able to operate, and more than 200,000 head of cattle were treated which would otherwise have remained to accentuate the existing depression. The bounty paid during the year amounted to £117,245 17s. 5d. for frozen beef, and £4,521 10s. 0d. for live cattle. The condition of the beef industry is still unsatisfactory, and the Government has renewed the bounty for the 1923 season on the same basis as in 1922.

§ 4. Sheep.

1. Initiation of the Pastoral Industry.—Fortunately for Australia, the suitability of its climate and general conditions for the production of a high class of wool was, at an early date in the history of its settlement, surmised and tested by Captain Macarthur, one of the pioneer sheep-breeders of New South Wales. To the energy of this enterprising pastoralist is due in large measure the rapid and extremely satisfactory development of Australia as a producer of fine wool, and though it would appear that the introduction of the merino sheep into Australia was not due to Macarthur, a great deal of the credit for having successfully established the pastoral industry in Australia must certainly be his.

2. Distribution throughout Australia.—With the exception of a short period in the early sixties, when the flocks of Victoria outnumbered those of the mother State, New South Wales has maintained the lead in sheep-raising which naturally attached to it as the portion of Australia in which settlement was first effected. From 1878 to 1901, the number of sheep in New South Wales represented more than half the total for Australia, but in recent years the proportion has fallen away considerably.

The extensive losses of sheep in Australia caused by droughts may be seen from the graph accompanying this chapter.

Four marked periods of decline greatly reduced the numbers at successive intervals, but these losses were quickly regained, and by a corresponding series of increases the flocks were soon re-established, the number during 1921 amounting to over 82,000,000.

In 1891 the number reached its maximum, viz., 106,421,068. There has been no approach to that number in recent years, but it has been considered that the flocks in 1891 were in excess of the reasonable sheep-carrying capacity of the country. The rapid growth of the frozen mutton and lamb industry precludes the building up of Australia's flocks to such large dimensions as heretofore, and it appears unlikely that the 1891 figures will be approached in the immediate future.

The number of sheep in the several States and Territories for each year from 1917 to 1921 was as follows:—

SHEEP.—NUMBER, 1917 TO 1921.

Year.	New South Wales. (b)	Victoria. (a)	Queens-land.	South Australia. (b)	Western Australia.	Tasmania. (a)	Nor. Ter.	Fed. Cap. Ter. (b)	Total.
1917	38,482,465	14,760,013	17,204,268	6,229,519	6,384,191	1,711,116	54,709	138,731	84,965,012
1918	37,243,770	15,773,902	18,220,985	6,625,184	7,183,747	1,841,924	58,620	138,104	87,086,236
1919	29,077,514	14,422,745	17,379,332	6,014,565	6,697,951	1,781,425	8,811	171,739	75,554,082
1920	33,691,838	12,171,084	17,404,840	6,359,944	6,532,965	1,570,832	6,062	159,990	77,897,555
1921	37,025,716	12,325,818	18,402,399	6,257,052	6,506,177	1,551,273	6,349	151,686	82,226,470

(a) 1st March, year following.

(b) 30th June, year following.

During the year 1919 the Avon Downs Pastoral Company in the Northern Territory disposed of the whole of their flock numbering about 50,000, and this property is now stocked with cattle only.

3. **Proportion in the Several States and Territories.**—Particulars concerning the relative positions of the several States and Territories with respect to the total flocks of Australia during the years 1917 to 1921 are given hereunder:—

SHEEP.—PERCENTAGE IN EACH STATE, 1917 TO 1921.

Year.	N.S.W.	Victoria.	Q'land.	S. Aust.	W. Aust.	Tas.	N. Ter.	Fed. Cap. Ter.	Total.
	%	%	%	%	%	%	%	%	%
1917	45.29	17.37	20.25	7.33	7.52	2.01	0.07	0.16	100.00
1918	42.77	18.11	20.92	7.61	8.25	2.11	0.07	0.16	100.00
1919	38.49	19.09	23.00	7.96	8.86	2.36	0.01	0.23	100.00
1920	43.25	15.62	22.34	8.16	8.39	2.02	0.01	0.21	100.00
1921	45.03	14.99	22.38	7.61	7.91	1.89	0.01	0.18	100.00

4. **Relation to Population.**—The relation of the flocks of the several States and Territories to the population at the end of each year from 1917 to 1921 is as follows:—

SHEEP.—NUMBER PER HEAD OF POPULATION, 1917 TO 1921.

Year.	N.S.W.	Victoria.	Q'land.	S. Aust.	W. Aust.	Tas.	N. Ter.	Fed. Cap. Ter.	All States.
1917	19.83	10.41	25.02	13.82	20.83	8.64	11.39	56.10	16.97
1918	18.66	10.97	25.83	14.14	23.19	9.08	12.63	58.59	16.99
1919	14.07	9.59	23.56	12.36	20.46	8.48	1.94	77.29	14.15
1920	16.03	7.96	23.14	12.78	19.75	7.38	1.52	62.04	14.35
1921	17.24	7.95	23.90	12.39	19.41	7.10	1.70	52.05	14.86

The ratio to population has decreased by more than two sheep per head since 1917. This, decline, however, is temporary, and has been caused by the losses during the drought in 1919 and the earlier part of 1920.

Apart from the effect of drought the percentage of sheep depastured in the different States changes little. The only noteworthy alteration was a loss of 2.38 per cent. in Victoria, as the result of a decrease of 2,434,195 sheep in that State since 1917.

5. **Comparison with other Countries.**—As regards the size of its flocks, and the quantity and quality of wool produced, Australia has long occupied a leading position amongst the sheep-raising countries of the world. From estimates published in the Year Book of the International Institute of Agriculture it would appear that the approximate number of sheep in the world is in the neighbourhood of 550,000,000, to which total Australia contributes about 15 per cent. The following comparison taken mainly from

the same source gives the latest available figures relative to the number of sheep in the principal wool-producing countries:—

SHEEP.—NUMBER IN VARIOUS COUNTRIES.

Country.	Date.	No. of Sheep ('000 omitted).	Country.	Date.	No. of Sheep ('000 omitted).
Australia	1921	82,226	Tanganyika Territory(b)	1912	6,440
Russia (a)	1920	50,543	French West Africa	1921	5,864
Argentine Republic	1920	45,309	Greece	1920	5,811
U.S. of America ..	1922	37,209	Germany	1922	5,566
Union of South Africa	1921	31,718	Chile	1919	4,500
United Kingdom ..	1921	24,274	Portugal	1920	3,851
China	1916	22,232	Canada	1921	3,676
New Zealand	1922	22,222	Kenya Colony ..	1920	2,583
British India	1920	21,984	Upper Senegal & Niger	1918	2,161
Spain	1921	20,522	Poland	1921	2,093
Italy	1918	11,754	Tunis	1921	2,038
Uruguay	1916	11,473	French Sudan ..	1921	2,030
Turkey	1919	11,200	Hungary	1920	1,817
Rumania	1921	11,194	Italian Somaliland	1920	1,666
France	1921	9,600	Sweden	1919	1,564
Algeria	1915	8,941	Bolivia	1910	1,449
Bulgaria	1910	8,669	Basutoland ..	1911	1,369
India (Native States)	1920	8,188	Norway	1918	1,208
Brazil	1916	7,205	Latvia	1922	1,162
Peru	1917	6,900	Mexico	1920	1,090
Jugo-Slavia	1921	6,773	Finland	1920	1,032
French Morocco ..	1920	6,710	French Equatorial Africa	1918	1,000

(a) Including Caucasus and Siberia.

(b) Including goats.

6. Oversea Imports and Exports of Sheep.—As in the case of cattle, the overseas exports of live sheep from Australia are of comparatively small importance. During the past five years the principal consignments of ordinary sheep have been made to the Straits Settlements from the State of Western Australia. The purchases by South African and Japanese buyers at the Australian Stud Sheep Sales during recent years have opened up a regular export trade with these two countries in stud sheep, the bulk of which have been secured from the leading flocks of New South Wales, Victoria and South Australia. The following are particulars of the imports and exports for the years 1917–18 to 1921–22:—

SHEEP.—IMPORTS AND EXPORTS, AUSTRALIA, 1917–18 TO 1921–22.

Year.	Imports.		Exports.		Net Exports.	
	No.	Value.	No.	Value.	No.	Value.
		£		£		£
1917–18 ..	1,719	9,850	10,799	24,899 ⁷	9,080	15,049
1918–19 ..	607	4,776	18,608	39,783	18,001	35,007
1919–20 ..	269	6,258	21,870	64,112	21,601	57,854
1920–21 ..	3,038	8,828	22,345	149,803	19,307	140,975
1921–22 ..	345	4,836	36,456	41,757	36,111	36,921

7. Sheep Slaughtered.—The number of sheep slaughtered in the several States during each of the years from 1917 to 1921 was as follows:—

SHEEP (INCLUDING LAMBS) SLAUGHTERED, 1917 TO 1921.

Year.	N.S.W. (b)	Victoria.	Q'land.	S. Aust. (b)	W. Aust.	Tas. (a)	Nor. Ter.	Fed. Cap. Ter.(b)	Total.
1917 ..	3,198,465	2,499,002	689,905	808,914	590,244	259,287	c500	3,713	8,050,030
1918 ..	4,271,396	3,581,460	542,479	1,137,578	630,117	295,844	c500	3,334	10,462,708
1919 ..	5,533,484	6,324,490	717,191	1,478,557	800,252	330,000	c100	3,800	15,187,874
1920 ..	3,847,498	4,244,798	461,449	1,058,977	839,963	387,346	c100	3,765	10,843,896
1921 ..	5,225,617	4,005,587	769,360	1,208,347	871,831	362,871	30	3,333	12,446,976

(a) Partly estimated.

(b) Year ended 30th June year following.

(c) Estimated.

8. **Production and Consumption of Mutton and Lamb.**—The annual production of mutton and lamb during the past seven years averaged 469,056,000 lbs., of which 362,881,000 lbs., or 77.4 per cent., was consumed locally, the balance of 22.6 per cent. being exported. The consumption of mutton and lamb in Australia during the period amounted to 69.47 lbs. per head per annum, which is considerably in excess of the 26.65 lbs. and the 6.00 lbs. per head per annum consumed in the United Kingdom and the United States of America respectively.

9. **Exports of Mutton and Lamb Preserved by Cold Process.**—The export trade in mutton and lamb preserved by cold process grew rapidly until in 1913, the year immediately before the war, the value of the shipments amounted to nearly £3,000,000. The exports fell off considerably during the war years, but the release of shipping space and high prices in England were responsible for the record shipment of 246,971,346 lbs., valued at £5,482,564 in 1919–20. The dearth of supplies consequent upon the drought greatly reduced the consignments in 1920–21, but the trade expanded in 1921–22, and from figures already available the volume of the exports in 1922–23 will nearly double those of 1921–22. Considerable attention is paid to the breeding of a class of sheep that will best meet the requirements of consumers. Crosses between the Merino and the Lincoln, or between the Merino and the Leicester breeds have proved exceedingly valuable, as they furnish both a good quality of wool and an excellent carcass for export purposes. The breeding of Shropshire and Southdown sheep with a view to combining meat production with that of wool is also on the increase. Special attention is being paid to the raising of lambs, as it has become widely recognized that with suitable breeds the export trade in lambs is very profitable.

As in the case of frozen beef, the principal customer in this trade is the United Kingdom, which has absorbed 92 per cent. of the total quantity exported from Australia during the last five years, while the balance was shipped mainly to Egypt, the Straits Settlements, and Sweden.

MUTTON AND LAMB PRESERVED BY COLD PROCESS.—EXPORTS, AUSTRALIA, 1917–18 TO 1921–22.

Country to which Exported.	1917–18.	1918–19.	1919–20.	1920–21.	1921–22.	Total for 5 years.
----------------------------	----------	----------	----------	----------	----------	--------------------

QUANTITY.

	lbs.	lbs.	lbs.	lbs.	lbs.	lbs.
United Kingdom ..	9,532,577	49,784,705	230,154,276	47,792,058	88,631,613	434,895,229
Egypt ..	8,071,709	8,464,515	..	2,744,246	178,380	19,458,850
Straits Settlements ..	824,406	754,089	1,102,658	1,228,087	1,089,985	4,999,225
Sweden ..	..	..	2,119,602	1,217,551	..	3,337,153
Ceylon ..	252,716	189,875	383,518	398,214	396,880	1,621,203
Hong Kong ..	144,789	195,881	376,315	410,329	391,166	1,518,480
Union of South Africa ..	..	..	1,578,839	193,709	72,920	1,845,468
Philippine Islands ..	122,963	194,843	595,312	237,264	289,294	1,439,676
Canada ..	199,092	..	273,047	37,427	329,030	838,596
United States ..	..	..	148,304	124,535	..	272,839
Other Countries ..	27,058	103,547	1,239,475	510,401	335,731	2,216,212
Total ..	19,175,310	59,687,455	246,971,346	54,893,821	91,714,999	472,442,931

VALUE.

	£	£	£	£	£	£
United Kingdom ..	213,710	1,082,046	5,292,542	1,393,179	2,073,276	10,055,353
Egypt ..	194,199	176,551	..	64,409	3,514	438,673
Straits Settlements ..	23,885	20,796	30,599	36,980	24,750	137,010
Sweden ..	..	..	49,303	29,805	..	79,108
Ceylon ..	7,103	5,058	10,401	11,784	7,781	42,127
Hong Kong ..	4,072	5,399	10,201	12,352	8,690	40,714
Union of South Africa ..	..	..	34,788	4,585	1,029	40,352
Philippine Islands ..	3,425	5,395	14,709	6,595	6,347	36,471
Canada ..	5,471	..	8,675	955	7,422	22,523
United States ..	..	..	3,603	4,684	..	8,287
Other Countries ..	782	2,586	27,743	13,380	6,806	51,297
Total ..	452,647	1,298,431	5,482,564	1,578,658	2,139,615	10,951,915

§ 5. Wool.

1. **Importance of Wool Production.**—Wool is the chief factor in the pastoral wealth of Australia, the value of the output for the season ended 30th June, 1922, being about £34,570,000. The bulk of the production is exported, but with the greater activity of the local woollen mills there has, in recent years, been an increasing quantity used in Australia, although even now the quantity so used represents only about 9 per cent. of the whole clip.

2. **Greasy and Scoured Wool.**—For the purpose of comparing the clips as a whole for a series of years, it is convenient to have the total production expressed in terms of greasy wool.

The quantity of Australian wool scoured and washed before export during recent years has been on the average about 20 per cent. of the total clip. The loss of weight in scouring varies largely with season, locality, breed, and condition. It seems preferable to express "scoured and washed" wool in terms of "greasy" rather than vice versa, since the absolute error arising from uncertainty as to average loss of weight is thereby minimized.

In the tables dealing with production "scoured and washed" wool has been converted into the estimated equivalent amount of "greasy" on the assumption that two pounds of "greasy" wool are on the average required to produce one pound of "scoured and washed."

3. **Production.**—(i) *Total.* The estimated production of wool in the several States, formerly based on the Customs returns, being no longer available from that source, an effort has been made to arrive at approximate figures from data collected by the State Statisticians from growers, fellmongers, etc. Particulars for years prior to 1917-18 will be found in earlier issues of the Year Book. The following table gives the estimates obtained for the five seasons ended 30th June, 1918 to 1922:—

WOOL.—TOTAL PRODUCTION, 1917-18 TO 1921-22.

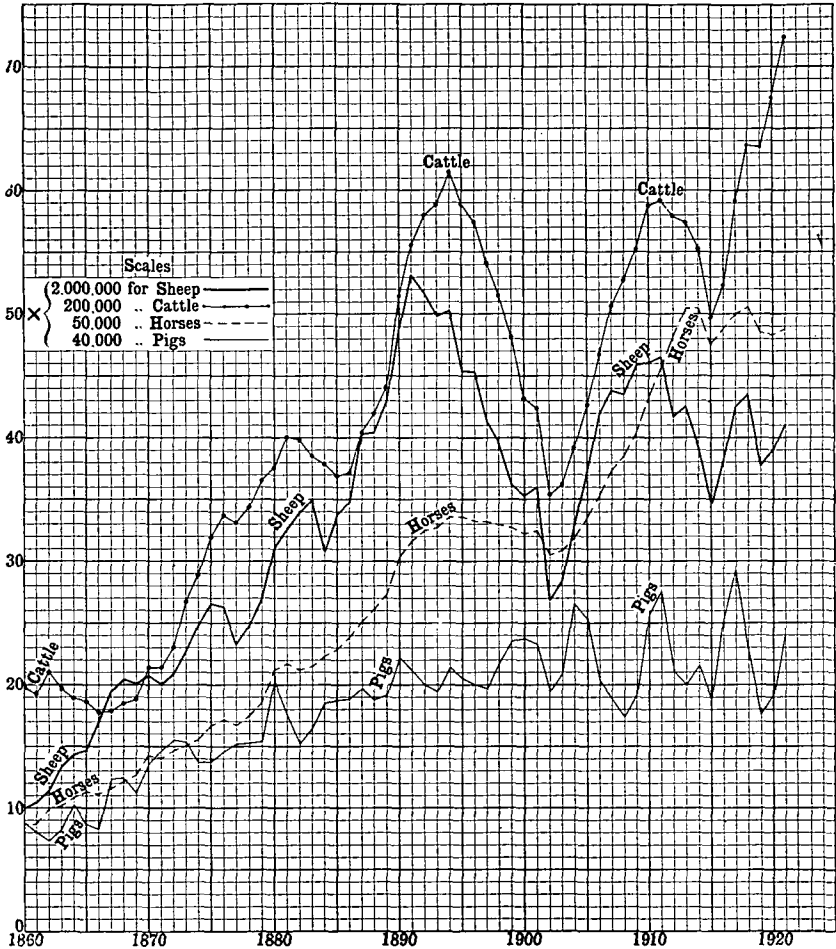
State.	1917-18.	1918-19.	1919-20.	1920-21.	1921-22.
	lbs.	lbs.	lbs.	lbs.	lbs.
New South Wales (a)	284,188,000	305,613,000	296,641,000	240,231,000	285,418,000
Victoria ..	105,424,682	126,647,061	132,847,167	90,250,571	103,512,777
Queensland ..	87,425,558	113,777,272	118,035,461	114,809,963	132,579,733
South Australia ..	46,339,339	55,947,108	58,306,918	48,953,503	54,038,262
Western Australia ..	39,701,357	45,317,271	46,299,381	43,714,630	46,301,039
Tasmania ..	9,927,044	10,279,998	11,069,237	9,503,048	9,634,624
Northern Territory (b)	330,000	330,000	50,000	40,000	30,000
Total ..	573,335,980	657,911,710	663,249,164	547,502,715	631,514,435

(a) Including Federal Territory.

(b) Approximate figures.

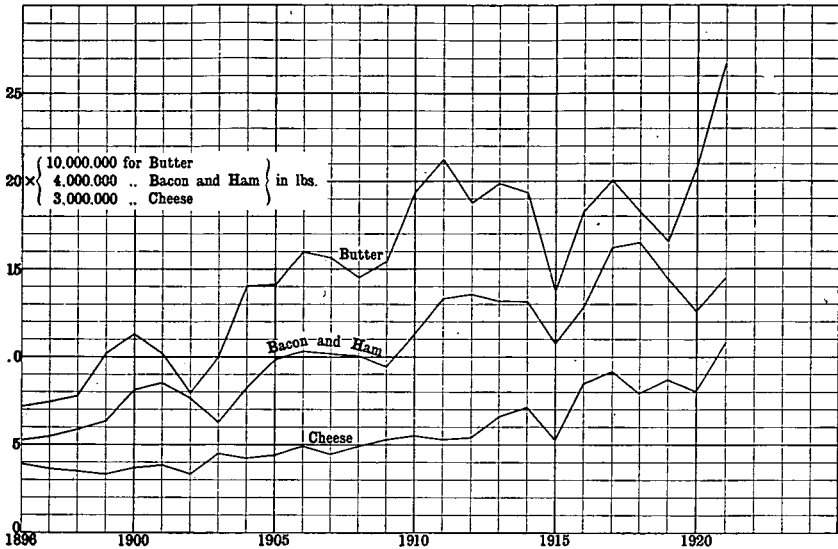
In connexion with the figures obtained by the State Statisticians, a slight deficiency is apparent when comparisons have been made with totals obtained from oversea shipments plus local consumption, or with the returns published by the Central Wool Committee. The extent of the discrepancy in recent years cannot be estimated until the stocks of carry-over wool are despatched from Australia.

NUMBER OF HORSES, CATTLE, SHEEP, AND PIGS—AUSTRALIA, 1860 TO 1921.



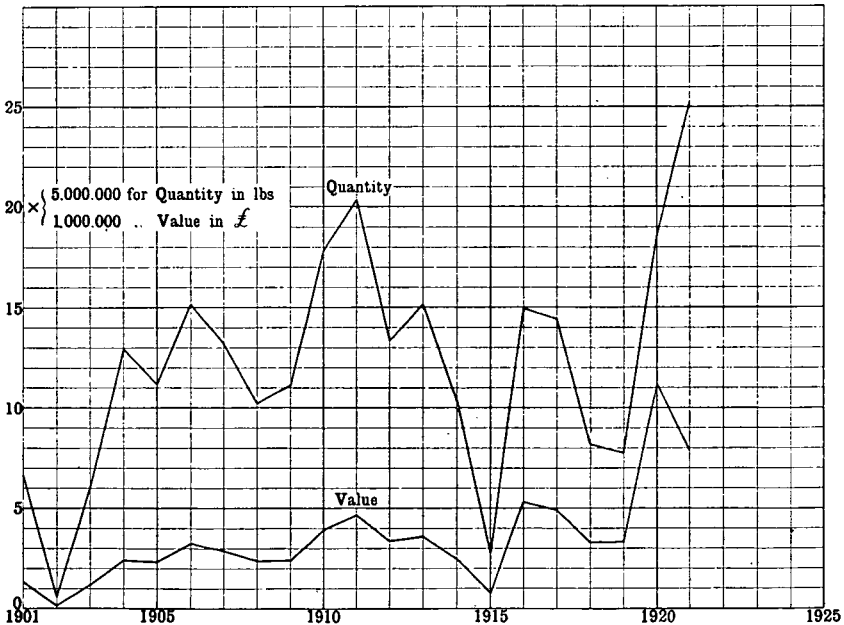
EXPLANATION.—The base of each small square represents an interval of one year, and the vertical side 2,000,000 in the case of sheep, 200,000 for cattle, 50,000 for horses, 40,000 for pigs.

PRODUCTION OF BUTTER AND CHEESE, AND BACON AND HAM—AUSTRALIA,
1896 TO 1921.



EXPLANATION.—The base of each small rectangle represents an interval of one year, and the vertical height of each denotes in the case of butter 10,000,000 lbs.; in the case of bacon and ham, 4,000,000 lbs.; and in the case of cheese 3,000,000 lbs.

QUANTITY AND VALUE OF NET EXPORTS OF BUTTER FROM AUSTRALIA, 1900 TO 1921.



EXPLANATION.—The base of each small rectangle represents an interval of one year, and the vertical height of each 5,000,000 lbs. in weight, or £1,000,000 in value.

(ii) *Weight and Value per Sheep Shorn.* The weight and value of wool per sheep shorn in the past five seasons is shown in the following table :—

WOOL.—WEIGHT AND VALUE PER SHEEP SHORN, 1917-18 TO 1921-22.

Season ended 30th June.	N.S.W.	Vic.	Q'land.	S. Aust.	W. Aust.	Tas.	All States.
WEIGHT.							
	lbs.	lbs.	lbs.	lbs.	lbs.	lbs.	lbs.
1918	7.08	6.19	6.91	7.52	6.17	5.38	6.80
1919	7.13	6.21	6.30	7.41	6.09	5.09	6.68
1920	7.03	6.38	6.59	7.89	5.71	5.32	6.73
1921	6.93	5.77	7.03	7.56	5.76	5.19	6.65
1922	7.49	6.23	7.57	7.70	6.19	5.77	7.18
VALUE.							
	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.
1918	8 9	8 6	9 7	9 1	7 11	8 5	8 9
1919	8 11	8 3	8 10	9 0	7 4	7 9	8 7
1920	8 10	8 4	9 3	9 3	7 1	8 3	8 9
1921	7 11	7 10	8 9	8 6	6 3	7 3	8 0
1922	8 1	6 11	8 11	7 8	6 5	6 8	7 10

4. Care Needed in Comparing Clips.—In comparing successive clips allowance must be made for the circumstance that owing to climatic or other conditions, the time of shearing may be so far delayed that one clip may include almost thirteen months' growth of wool, while the succeeding one may include little more than eleven months' growth.

5. World's Wool Production.—The following table compiled by the Textile Division of the United States Department of Commerce shows the importance of Australia as a wool-producing country. Out of a total production of 2,697,192,000 lbs. in 1922 Australia's contribution amounted to 631,514,000 lbs., or nearly one quarter of the world's supply.

WOOL(a).—WORLD PRODUCTION, 1921 AND 1922.

Countries.	Average Annual Pre-War Production.(b)	Production.	
		1921.	1922.(c)
North America—	lbs.	lbs.	lbs.
United States	314,110,000	273,064,000	261,095,000
Canada	11,210,000	21,251,000	19,125,000
Mexico	7,000,000	750,000	792,000
Total	332,320,000	295,065,000	281,012,000
Central America and West Indies	1,000,000	750,000	750,000
South America—			
Argentine Republic	358,688,000	286,000,000	231,483,000
Brazil	35,000,000	27,000,000	27,000,000
Chile	17,430,000	31,500,000	31,500,000
Peru	9,940,000	14,500,000	15,000,000
Falkland Islands	4,324,000	3,200,000	3,200,000
Uruguay	156,968,000	95,000,000	80,000,000
All other	5,000,000	5,000,000	5,000,000
Total	587,350,000	462,200,000	393,183,000

(a) Computed on greasy basis. (b) Average for years 1909 to 1913 inclusive. (c) Where 1922 figures were not obtainable an earlier figure or an unofficial estimate has been inserted.

WOOL(a).—WORLD PRODUCTION, 1921 AND 1922—continued.

Countries.	Average Annual Pre-War Production.(b)	Production.	
		1921.	1922.(c)
	lbs.	lbs.	lbs.
Europe—			
Austria	15,360,000	1,250,000	1,250,000
Belgium	1,060,000	1,205,000	825,000
Bulgaria	23,700,000	17,637,000	17,637,000
Czecho-Slovakia .. ..	..	4,303,000	4,303,000
Denmark	3,508,000	1,598,000	1,323,000
Estonia .. ..	..	13,224,000	13,224,000
Finland .. ..	..	3,250,000	3,300,000
France	80,688,000	38,500,000	38,220,000
Germany	25,600,000	54,013,000	51,809,000
Greece	14,000,000	11,934,000	13,420,000
Hungary	17,637,000	9,370,000	9,370,000
Iceland	1,980,000	1,980,000	1,980,000
Italy	55,000,000	50,000,000	50,000,000
Jugo-Slavia	25,446,000	29,762,000	24,251,000
Netherlands	3,556,000	4,400,000	4,400,000
Norway	8,160,000	4,409,000	4,409,000
Poland .. ..	..	6,725,000	6,725,000
Portugal	10,000,000	7,275,000	7,717,000
Rumania	13,228,000	14,000,000	18,032,000
Russia	320,000,000	150,000,000	150,000,000
Spain	52,000,000	165,347,000	165,347,000
Sweden	6,060,000	6,613,000	6,613,000
Switzerland	1,049,000	800,000	800,000
Turkey	28,000,000	..	..
United Kingdom	134,000,000	102,297,000	103,217,000
All other .. ..	..	15,000,000	15,000,000
Total	840,032,000	714,892,000	713,172,000
Asia—			
British India	60,000,000	60,000,000	60,000,000
China	50,000,000	61,320,000	61,320,000
Persia	12,146,000	12,146,000	12,146,000
Russia in Asia	60,000,000	45,000,000	45,000,000
Turkey in Asia	90,000,000	60,000,000	60,000,000
All other	1,000,000	1,000,000	1,000,000
Total	273,146,000	239,466,000	239,466,000
Africa—			
Algeria	35,221,000	35,550,000	35,155,000
British South Africa	157,761,000	161,700,000	187,000,000
Tunis	3,735,000	6,930,000	6,765,000
Morocco	14,850,000	18,640,000	19,175,000
Total	211,567,000	222,820,000	248,095,000
Oceania—			
Australia	700,193,000	547,503,000	631,514,000
New Zealand	198,474,000	191,614,000	175,000,000
Total	898,667,000	739,117,000	806,514,000
Total all other Countries	13,000,000	13,000,000	15,000,000
GRAND TOTAL	3,157,082,000	2,687,310,000	2,697,192,000

(a) Computed on greasy basis. (b) Average for years 1909 to 1913 inclusive. (c) Where 1922 figures were not obtainable an earlier figure or an unofficial estimate has been inserted.

6. **Wool Locally Used.**—The quantity of wool used in the woollen and tweed mills of the various States during the past five years was approximately as follows:—

**WOOL.—GREASY, USED IN LOCAL WOOLLEN AND TWEED MILLS,
1918 TO 1921-22.**

State.	1918.	1918-19.	1919-20.	1920-21.	1921-22.
	lbs.	lbs.	lbs.	lbs.	lbs.
New South Wales	a 6,118,000	6,769,284	7,054,962	7,200,896	6,648,224
Victoria	a 7,344,035	7,823,050	11,300,400	12,799,583	13,238,011
Queensland	268,917	268,917	634,376	556,232	1,822,494
South Australia	a 734,723	654,758	693,297	683,779	608,098
Western Australia					
Tasmania	1,301,006	1,301,006	997,542	1,129,722	1,043,706
Total	15,766,681	16,817,015	20,680,577	22,376,222	23,415,533

(a) Year ended 30th June.

The total consumption of wool in Australia cannot be given, as particulars in respect of wool-combing and knitting establishments are not collected in all the States. An estimate of home requirements may, however, be obtained from the purchases made by Australian manufacturers at local wool sales, the total purchases in 1921-22 amounting to about 56,000,000 lbs.

7. **Exports of Wool.**—(i) *Greasy-Quantities.* Prior to the war, about 31 per cent. of the exports of wool from Australia was despatched to the United Kingdom, whereas the shipments for the same destination during the past five years have averaged 68 per cent. The other leading consignees for the last five years were the United States of America, Japan, France, Belgium, and Italy. The following table shows for the years 1917-18 to 1921-22 the quantities of "greasy" wool exported, and the principal countries of destination:—

WOOL IN THE GREASE.—EXPORTS, AUSTRALIA, 1917-18 TO 1921-22.

Country to which Exported.	1917-18.	1918-19.	1919-20.	1920-21.	1921-22.	Total for 5 years.
	lbs.	lbs.	lbs.	lbs.	lbs.	lbs.
United Kingdom	139,113,437	352,282,663	397,688,435	283,583,260	337,775,993	1,510,443,788
United States of America	57,425,217	71,776,334	28,326,008	34,291,220	45,778,371	237,597,150
France	5,675,577	3,719,125	32,243,017	32,484,058	136,751,611	210,873,388
Italy	17,641,985	10,036,918	44,597,155	15,975,186	39,629,626	127,880,870
Belgium			39,189,760	26,021,710	55,690,271	120,901,741
Japan	2,919,477	5,319,577	8,928,971	9,856,174	50,775,592	77,799,791
Germany				8,715,299	39,830,067	48,545,366
Egypt	15,522,281	10,950,893			290	26,473,464
Canada	4,726,317	3,152,424		362,915	1,619,372	9,861,028
India	778,286	795,792		381,516	613,701	2,569,295
Other Countries			1,360,782	6,228,698	2,255,819	9,845,299
Total	243,802,577	458,033,726	552,334,128	417,900,036	710,720,713	2,382,791,180

(ii) *Scoured and Washed—Quantities.* Similar particulars concerning the exports of "scoured and washed" wool are as follows:—

WOOL SCOURED AND WASHED(a).—EXPORTS, AUSTRALIA, 1917-18 TO 1921-22.

Country to which Exported.	1917-18.	1918-19.	1919-20.	1920-21.	1921-22.	Total for 5 years.
	lbs.	lbs.	lbs.	lbs.	lbs.	lbs.
United Kingdom	59,247,374	103,261,254	70,454,411	43,100,738	65,815,973	341,879,750
Belgium			13,931,527	10,648,048	16,153,469	40,733,044
Japan	4,779,081	3,447,825	3,676,467	3,719,499	5,051,529	20,674,401
France	62,148	27,239	105,177	1,544,101	13,271,181	15,009,846
United States of America	1,446,501	1,460,294	2,600,657	6,490,418	1,880,728	13,878,598
Germany				279,822	3,209,868	3,489,690
Italy	475,914			568,690	1,500,550	2,545,154
Egypt	1,074,558	35,780				1,110,338
India	51,664	216,326		130,260	48,831	447,081
Other Countries	299,490	687,271	282,537	1,642,802	1,627,222	4,539,322
Total	67,436,730	109,135,989	91,050,776	68,124,378	108,559,351	444,307,224

(a) Including "tops."

The figures for "scoured and washed wool" include tops, amounting in 1917-18 to 4,571,357 lbs. valued at £1,510,799; in 1918-19, 2,822,578 lbs., valued at £935,212; in 1919-20; 6,148,118 lbs., valued at £2,957,679; in 1920-21, 6,598,681 lbs., valued at £2,049,588, and in 1921-22, 6,200,505 lbs., valued at £1,207,048. The total exports of wool tops during the last five years amounted to 26,341,239 lbs., valued at £8,660,326, of which 18,395,708 lbs., or nearly 70 per cent., were shipped to Japan.

(iii) *Total Value of Exports.* The total value of the wool exported from Australia to the principal countries during the five years under review was :—

WOOL EXPORTS.—TOTAL VALUE, AUSTRALIA, 1917-18 TO 1921-22.

Country to which Exported.	1917-18.	1918-19.	1919-20.	1920-21.	1921-22.	Total for 5 years.
	£	£	£	£	£	£
United Kingdom ..	15,648,660	34,563,566	37,256,915	21,889,438	23,013,128	132,371,707
United States of America ..	4,389,755	4,982,056	2,516,142	3,836,987	4,347,360	20,072,300
Japan ..	1,796,089	1,400,192	2,010,732	2,107,473	4,438,672	11,753,158
France ..	372,453	304,410	2,352,749	1,357,358	6,842,265	11,229,235
Belgium ..			3,356,349	2,380,519	3,784,065	9,520,933
Italy ..	1,005,058	548,142	2,832,951	1,164,280	2,667,081	8,217,512
Germany ..				364,196	2,404,833	2,769,029
Egypt ..	939,149	613,814			8	1,552,971
Canada ..	338,087	238,924	63,520	79,588	245,421	965,540
India ..	66,780	78,336		45,198	50,243	240,557
Other Countries ..	30,833	37,315	154,445	555,723	184,167	962,483
Total ..	24,586,864	42,766,755	50,543,803	33,780,760	47,977,243	199,655,425

8. *Average Export Value.*—The average values per lb. of Australian greasy wool according to the export returns for the past five years have been as follows :—

AUSTRALIAN GREASY WOOL.—EXPORT VALUE PER LB., 1917-18 TO 1921-22.

Year	1917-18.	1918-19.	1919-20.	1920-21.	1921-22.
	d.	d.	d.	d.	d.
Average value per lb. ..	16.71	16.49	16.69	14.53	13.16

9. *Exports and Local Sales of Wool, States, 1921-22.*—About 86 per cent. of the wool grown in Australia is sold in the local markets prior to export. Buyers from the United Kingdom, France, Germany, and other European countries, also from America, Japan, China, and India, attend the sales conducted in Sydney, Melbourne, Geelong, Brisbane, Adelaide, Perth, Hobart, and Launceston.

The following table shows the number of bales of wool exported overseas from each State during the season ended 30th June, 1922, and bales sold for shipment, for use in local woollen mills, for scouring, etc. It must be noted that as considerable quantities of wool grown in some States are sold in or shipped from others these figures do not show actual local production, but total overseas shipments and sales.

WOOL.—EXPORTS AND LOCAL SALES, SEASON 1921-22.

State.	Overseas Exports.		Local Sales.(a)	
	Bales.	%	Bales.	%
New South Wales ..	1,008,361	39.09	920,906	41.36
Victoria ..	627,143	24.31	(b)608,029	27.30
Queensland ..	502,687	19.49	371,990	16.71
South Australia ..	217,070	8.42	228,795	10.27
Western Australia ..	174,741	6.77	70,134	3.15
Tasmania ..	49,482	1.92	26,904	1.21
Total ..	2,579,484	100.00	2,226,758	100.00

(a) Including wool sold to local woollen mills, scourers, etc. (b) Including wool sold at Albury.

10. Exports and Local Sales of Wool, Australia, 1895 to 1922.—The number of bales of wool exported from Australia and the number sold at local sales prior to shipment, or taken for local use from 1895 onwards are shown in the following table :—

WOOL.—EXPORTS AND LOCAL SALES, AUSTRALIA, 1895 TO 1922.

Year ended 30th June.				Overseas Exports.	Local Sales.(a)	Ratio of Wool sold locally to Exports.
				Bales.	Bales.	%
1895	..	...	..	1,595,652	817,333	51.22
1900	..	..	..	1,221,163	807,031	66.09
1905	..	..	..	1,218,969	926,940	76.04
1910	..	..	..	1,921,705	1,624,561	84.54
1911	..	..	..	1,975,378	1,642,555	83.15
1912	..	..	..	2,020,547	1,700,494	84.16
1913	..	..	..	1,718,486	1,518,650	88.37
1914	..	..	..	1,966,576	1,703,744	86.64
1922	..	..	..	2,579,484	2,226,758	86.33

(a) Including wool absorbed by local woollen mills and wool-scouring establishments.

The steady development of the Australian wool market is clearly shown in this table. In the nineteen years ended 1914, the quantity sold locally more than doubled, and the ratio of wool sold locally to that exported increased from 51 per cent. in 1895 to over 86½ per cent. in the season ended 30th June, 1914. Particulars for the years 1915 to 1921 are not comparable owing to the abnormal conditions arising from the war, but the figures for the 1921–22 selling season indicate a return to normal, despite the heavy disposals consequent upon the huge stocks of carry-over wool from the previous season.

11. Quantities of Various Descriptions of Wool Sold in Each State.—The quantities and ratios of the various descriptions of wool marketed in each State are given in the following table :—

WOOL.—LOCAL SALES, DESCRIPTIONS, 1921–22.

Description of Wool.	N.S.W.	Victoria. (a)	Q'land.	S. Aust.	W. Aust.	Tasmania.	Total.
	Bales.	Bales.	Bales.	Bales.	Bales.	Bales.	Bales.
Greasy ..	836,032	597,864	332,590	226,309	68,104	26,904	2,087,803
Scoured ..	84,874	10,165	39,400	2,486	2,030	..	138,955
					0		
Total ..	920,906	608,029	371,990	228,795	70,134	26,904	2,226,758
Fleece, etc. ..	881,307	571,063	350,433	208,330	63,935	26,092	2,101,160
Lambs' ..	39,599	36,966	21,557	20,465	6,199	812	125,598
Total ..	920,906	608,029	371,990	228,795	70,134	26,904	2,226,758
Merino ..	674,103	259,527	364,855	214,124	57,271	8,511	1,578,391
Crossbred and all strong breeds ..	246,803	348,502	7,135	14,671	12,863	18,393	648,367
Total ..	920,906	608,029	371,990	228,795	70,134	26,904	2,226,758

(a) Including wool sold at Albury.

WOOL.—LOCAL SALES, DESCRIPTIONS, 1921-22—*continued*.

Description of Wool.	N.S.W.	Victoria. (a)	Q'land.	S. Aust.	W. Aust.	Tasmania.	All States.
	%	%	%	%	%	%	%
Greasy	90.78	98.33	89.41	98.91	97.11	100.00	93.76
Scoured	9.22	1.67	10.59	1.09	2.89	..	6.24
Total	100.00	100.00	100.00	100.00	100.00	100.00	100.00
Fleece, etc. ..	95.70	93.92	94.20	91.06	91.16	96.98	94.36
Lambs	4.30	6.08	5.80	8.94	8.84	3.02	5.64
Total	100.00	100.00	100.00	100.00	100.00	100.00	100.00
Merino	73.20	42.68	98.08	93.59	81.66	31.63	70.88
Crossbred and all strong breeds ..	26.80	57.32	1.92	6.41	18.34	68.37	29.12
Total	100.00	100.00	100.00	100.00	100.00	100.00	100.00

(a) Including wool sold at Albury.

Wool in the grease represented more than 93 per cent. of the total marketed during 1921-22. Of fleece and lambs' wool, the former represents 94.36, and the latter 5.64 per cent. The class of wool produced is largely merino, which is almost exclusively grown in the northern, western, and central parts of the continent, the bulk of the merino wool dealt with in Victoria coming from Riverina and other parts of New South Wales. The development of the frozen mutton and lamb export trade and the resultant raising of a type of sheep suitable for both mutton and wool have led to a considerable increase in the production of crossbred wool throughout Australia during recent years. The proportion of such wool sold to the total sales amounted to 18.6 per cent. in 1912, whereas, eight years later, in 1919-20, the proportion had increased to 33.9 per cent. The accumulation after the war of large stocks of coarse wools in practically all the producing countries caused a fall in prices, and brought about a movement in Australia in favour of merino, which was reflected in the decreased percentage of crossbred wool sold in the 1921-22 season. If the catalogues of the latter season had not included considerable quantities of crossbred wool, which were unsaleable in the previous season, the statistics of the sales would have shown a more pronounced return to merino. While the requirements of the frozen mutton and lamb trade and the advance of closer settlement, with its preference for crossbred sheep-raising in conjunction with wheat-growing or mixed farming, will compel the maintenance of the crossbred flocks, the extraordinary demand for fine wool at remunerative rates will powerfully influence the Australian flockmasters to concentrate in the future on the production of merino wool, and its close counterparts, comeback and fine crossbred.

12. Percentages of Various Descriptions of Wool Sold in each State.—The following table gives the percentage of each description of wool sold in the several States on the total sold in Australia during the season 1921-22 :—

WOOL.—LOCAL SALES, PERCENTAGES, 1921-22.

Description of Wool.	N.S.W.	Victoria.	Q'land.	S. Aust.	W. Aust.	Tasmania.	Total.
	%	%	%	%	%	%	%
Greasy	40.04	28.64	15.93	10.84	3.26	1.29	100.00
Scoured	61.08	7.32	28.35	1.79	1.46	..	100.00
Fleece, etc. ..	41.94	27.18	16.68	9.92	3.04	1.24	100.00
Lambs	31.53	29.43	17.16	16.29	4.94	0.65	100.00
Merino	42.71	16.44	23.12	13.56	3.63	0.54	100.00
Crossbred and all strong breeds ..	38.07	53.75	1.10	2.26	1.98	2.84	100.00

The bulk of the crossbred wool of Australia is grown in Victoria and the southern parts of New South Wales, Tasmania, where crossbred sheep largely predominate, coming

next in order, followed by small parcels from South Australia and Western Australia. In Victoria, where more than half the wool production is crossbred, a noticeable feature of the season has been a general fine-up of the medium and coarse crossbreds by the use of merino rams, and it is probable that the next two clips will have a greater proportion of comeback in them than for some years past.

13. The Wool Market.—(i) *The 1921-22 Season.* Following the depression in the wool market during 1920-21, and with 537,946 bales of unsold wool in addition to the incoming clip to be disposed of, the prospects for the 1921-22 season at the outset appeared poor. The causes which had brought about stagnation in the markets of the previous season had, however, reached their lowest point in 1920-21. The international outlook was more hopeful, and the demand for woollen fabrics was insistent consequent upon the restricted manufacture in the transition period due to the dislocation of credit and exchange. These conditions strengthened as the season advanced, with the result that the carry-over wools were cleared by November, and the great bulk of the new season's production had been sold at the close of the statistical year in the following June. The recovery of the wool market was complete, and confidence had been restored in the capacity of merino and fine crossbred wools to command values well above pre-war levels and the increased costs of production.

The 1921-22 clip was grown under generous pastoral conditions, and the wool opened up in sound, healthy condition. The bulk of the staple was well grown and of attractive appearance, and possessed very good spinning properties.

During the year the wool sold in Australia reached 2,226,758 bales, valued at £37,296,723, compared with 791,409 bales, valued at £13,114,997 in the previous year; an increase of 1,435,349 bales in quantity and £24,181,726 in value. Though the market conditions were vastly superior to the previous season, growers of faulty wools did not benefit to the same extent as producers of the choicer varieties. Still, the improved selling season was beneficial to every grower, and the tremendous clearances effected in all the markets prepared the way for more normal seasons, and for more payable results to growers of coarse crossbred wools.

Although the 1921-22 selling season was an exceptionally good one, the highest prices realized for greasy and scoured merino fleece were 7d. and 13d. per lb. respectively less than the maximum rates obtained in 1920-21. New records were established in greasy merino broken, pieces, bellies and lambs, although the scoured varieties fell below the previous highest bids, while greasy and scoured comeback and crossbred fleeces and lambs failed to even approximate existing records. The highest prices for the past nine seasons for wools sold at auction, or fixed by appraisalment at selling centres in Australia are as follows:—

**RECORD PRICES OBTAINED FOR WOOL IN AUSTRALIAN MARKETS, 1913-14
TO 1921-22.**

Description.	Price.	Brand.	Bales.	Selling Centre.	Season.
Greasy merino :	<i>d.</i>				
Fleece ..	49½	Ware (conj.) ..	5	Geelong ..	1920-21
Broken ..	34	R/Langiwilli ..	6	Geelong ..	1921-22
Pieces ..	29½	R/Langiwilli ..	6	Geelong ..	1921-22
Bellies ..	25½	Wurrook ..	8	Geelong ..	1921-22
Locks ..	13	MP (conj.) ..	..	Western Australia	1917-18
Lambs ..	32¼	Blythvale ..	4	Geelong ..	1921-22
Greasy comeback :					
Fleece ..	37½	North Station ..	6	Geelong ..	1920-21
Lamb ..	24½	JM/Table Top ..	1	Melbourne ..	1917-18
Greasy crossbred :					
Fleece ..	30½	CLF/Warrowie ..	13	Geelong ..	1920-21
Lamb ..	23½	JM/Table Top ..	3	Albury ..	1919-20
Scoured merino :					
Fleece ..	64	WG/Kedron ..	58	Brisbane ..	1920-21
Pieces ..	40½	M/Moselle Downs ..	3	Brisbane ..	1919-20
Lambs ..	44	PB & Co/Notus Downs	4	Brisbane ..	1919-20
Scoured crossbred :					
Fleece ..	40¼	O'Beirne/Linton ..	..	Geelong ..	1917-18

(ii) *Wool Realization Scheme.* The British Australian Wool Realization Association Ltd. ("Bawra") was formed on the 27th January, 1921, for the purpose of selling in conjunction with the existing clip 50 per cent. of the Australian carry-over wool acquired by the Association on account of the Australian growers; also to dispose of as agents all carry-over wools owned by the British Government and consisting of New Zealand, Falkland Islands, South African and 50 per cent. of Australian wools as promptly and to the best advantage as market conditions would permit, while at the same time contributing to stabilize the wool market which had become demoralized on the return to free wool sales. Towards the end of the year 1921, 80,550 bales of South African wool owned by the British Government were handed over to the Association for disposal under the Agency Agreement.

The assets of the Association consisting of cash, wool and other assets were capitalized at £22,000,000, and, subject to certain reservations, each supplier of Australian wool during the British Government purchase scheme was allotted negotiable documents in proportion to the appraised value of the wool which he contributed.

The marketing of B.A.W.R.A. wools has been successfully carried out at various centres in England, and on the Continent, and during the twelve months ended 30th June 1923, 777,500 bales were disposed of, leaving the stocks on hand at that date 523,000 bales, consisting of 2,000 bales of merino and 521,000 bales of crossbred. The details of stocks and disposals are set out in the following table :—

STOCKS AND DISPOSALS OF B.A.W.R.A. WOOLS, 1920 TO 1923.

Description.	Stocks, 31st December, 1920.	Disposals, 1st July, 1922, to 30th June, 1923. (a)	Stocks, 30th June, 1923.
Australian :—	Bales.	Bales.	Bales.
Merino	904,180	202,000	1,000
Crossbred	931,825	316,000	334,000
New Zealand :—			
Merino	3,181	1,500	1,000
Crossbred	769,762	240,000	187,000
Falkland Islands	2,329	..	..
South African	80,550	18,000	..
Grand Totals	2,691,827	777,500	523,000

(a) Approximate figures.

The whole of the Australian wool purchased by the British Imperial Government has now left Australia, the final shipment being made by the "Leitrim," which lifted 301 bales on the 1st May, 1923, included in which was the last bale of Australian wool covered by the British Government's contracts.

14. *Bounties on Combed Wool or Tops Exported.*—The details of the provisions and operations of the Bounties Act 1907, relative to Australian combed wool or tops exported, are contained in previous issues of the Year Book. During the eight years ended 31st December, 1915, in which the bounties were payable, a sum of £70,001 was paid on 17,990,131 lbs. of wool tops produced.

Figures showing the exports of wool tops for the years 1917–18 to 1921–22 inclusive will be found in 7 hereof.

15. **United Kingdom Importation of Wool.**—The appended tabular statement of the quantity and value of wool imported into the United Kingdom during the year 1921 from the principal wool-producing countries shows the important position which Australia occupies in the supply of wool to the mother country :—

WOOL.—IMPORTS, UNITED KINGDOM, 1921.

Country from which Imported.	Quantity.	Value.	Country from which Imported.	Quantity.	Value.
	lbs.	£		lbs.	£
Australia ..	342,661,500	18,937,739	Belgium ..	3,842,900	243,548
Union of S. Africa ..	169,540,300	8,910,295	Uruguay ..	4,343,900	174,801
New Zealand ..	164,812,300	8,327,222	Falkland Islands	3,231,100	154,432
Argentine Re-public ..	50,453,500	1,695,333	U.S. of America	130,400	5,914
Chile ..	34,547,200	1,462,552	Turkey ..	49,100	1,892
British India ..	56,635,100	1,143,892	Other countries	9,022,400	352,673
France ..	7,043,000	257,596	Total ..	846,312,700	41,667,889

Of the importations of wool into the United Kingdom, Australian wool represented 40 per cent. of quantity and 45 per cent. of value, and New Zealand 19 per cent. of quantity and 20 per cent. of value. It is interesting to note that 570,534,000 lbs., valued at £28,666,671, were received from British Possessions, being 67 per cent. of the total weight imported and 69 per cent. of the total value.

§ 6. Trade in Hides and Sheepskins.

1. **Extent of Trade.**—In addition to the hides and sheepskins treated in the tanneries of the several States, a very considerable export trade is carried on, the value of cattle hides and sheepskins exported from Australia during the five years 1917–18 to 1921–22 amounting to £11,303,644, or an average of £2,260,729 per annum.

2. **Sheepskins with Wool.**—By far the largest item included in the amount mentioned in the preceding sub-section arises from the value of sheepskins with wool—the exports of which during the five years aggregated £7,046,666. The largest purchaser of sheepskins with wool is the United Kingdom, to which nearly 80 per cent. of the consignments were despatched during the last five years. France ranked next in order of importance with 15 per cent., while the remaining 5 per cent. was shipped principally to Belgium and the United States of America. The exports of sheepskins with wool during each of the years from 1917–18 to 1921–22 were as follows :—

SHEEPSKINS WITH WOOL.—EXPORTS, AUSTRALIA, 1917–18 TO 1921–22.

Particulars.	1917–18.	1918–19.	1919–20.	1920–21.	1921–22.	Total for 5 years.
Sheepskins (with wool) .. No.	2,172,176	6,005,291	6,046,122	4,478,853	7,270,660	25,973,102
Value .. £	732,030	1,845,057	1,967,354	1,155,643	1,346,582	7,046,666

3. **Sheepskins without Wool.**—In the case of sheepskins without wool the principal countries of consignment are the United States of America and the United Kingdom. These two countries were responsible for nearly 90 per cent. of the exports during the past five years, the purchases of the United States of America alone amounting to 64 per cent. of the total shipments. Particulars concerning exports are as follows :—

SHEEPSKINS WITHOUT WOOL.—EXPORTS, AUSTRALIA, 1917–18 TO 1921–22.

Particulars.	1917–18.	1918–19.	1919–20.	1920–21.	1921–22.	Total for 5 years.
Sheepskins (without wool) .. No.	898,644	794,065	4,177,084	704,296	116,553	6,690,642
Value .. £	95,369	96,056	631,445	86,663	6,880	916,413

4. *Hides.*—(i) *Exports.* The Australian export trade in cattle hides is considerable, though not so important as in former years. The depression in the frozen meat trade with the resultant reduction in slaughterings has reduced the average annual value of the exports during the past five years by nearly one-half of the pre-war totals. The trade in cattle hides is mainly with the United Kingdom and the United States of America, which countries took one-half and one-fourth respectively of the total quantity exported during the past five years. Italy with 100,000, and Belgium and Germany with shipments amounting to 75,000 were the next largest purchasers.

Particulars concerning the export of cattle hides during the past five years are as follows:—

CATTLE HIDES.—EXPORTS, AUSTRALIA, 1917-18 TO 1921-22.

Particulars.			1917-18.	1918-19.	1919-20.	1920-21.	1921-22.	Total for 5 years.
Cattle Hides	..	No.	149,224	259,386	569,465	261,938	446,199	1,686,212
Value	..	£	364,397	566,720	1,504,116	375,412	530,355	3,341,000

The calfskins exported during the years 1917-18 to 1921-22 numbered 340,989, valued at £223,994, shipped mainly to the United States of America, the value of the skins taken by that country averaging 82 per cent. of the total exports during the past five years. The annual export of horse hides is very small, and averaged only 1,126 hides, valued at £1,809.

(ii) *Imports.* The import trade in cattle hides and calfskins is expanding and, with the exception of 1919-20, increases have taken place in the number imported during each of the last five years. New Zealand supplies the great bulk of these importations, and shipments of fairly large quantities are also obtained from the Pacific Islands. The number and value of cattle hides, including calfskins, imported into Australia during the five years 1917-18 to 1921-22 are as follows:—

CATTLE HIDES.—IMPORTS, AUSTRALIA, 1917-18 TO 1921-22.

Particulars.			1917-18.	1918-19.	1919-20.	1920-21.	1921-22.	Total for 5 years.
No.	..	..	132,218	260,237	205,662	313,442	451,373	1,362,932
Value	..	£	151,531	424,339	579,915	500,460	433,014	2,089,259

The number of horse hides imported into Australia is unimportant. Imports during the last five years numbered 15,694, valued at £18,249.