

CHAPTER XVIII.

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 Official 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 information is 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 1920, and from 1927 onwards in single years, are given in the following table, and are shown continuously in the graphs hereinafter.

During the seventy-two years covered by the table the live stock of Australia increased considerably, horses 309 per cent. ; cattle 223 per cent. ; sheep 461 per cent. ; and pigs 231 per cent. The average annual increases which these aggregates represent are as follow :—Horses, 1.98 per cent. ; cattle, 1.66 per cent. ; sheep, 2.42 per cent. ; and pigs, 1.68 per cent.

LIVE STOCK.—AUSTRALIA.

31st December.				Horses.	Cattle.	Sheep.(a)	Pigs.
1860	..	..	..	431,525	3,957,915	20,135,286	351,096
1870	..	..	..	716,772	4,276,326	41,593,612	543,388
1880	..	..	..	1,068,774	7,527,142	62,184,252	815,776
1890	..	..	..	1,521,598	10,299,816	97,881,221	891,138
1900	..	..	..	1,609,654	8,640,225	70,602,995	950,349
1910	..	..	..	2,165,866	11,744,714	98,066,046	1,025,850
1920	..	..	..	2,415,510	13,499,737	81,795,727	764,406
1927	..	..	..	2,040,691	11,617,056	100,827,476	878,207
1928	..	..	..	1,942,753	11,300,757	103,430,773	910,181
1929	..	..	..	1,845,614	11,202,134	104,558,342	1,018,324
1930	..	..	..	1,792,734	11,720,916	110,568,279	1,071,679
1931	..	..	..	1,775,550	12,260,955	110,618,893	1,167,845
1932	..	..	..	1,765,437	12,783,137	112,926,931	1,162,407

(a) See note to Table in § 4, 2 hereinafter.

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 1868, 1877, 1883-4, 1892, 1893, 1895, 1901-2, 1912, 1914-15, 1918, 1919, 1922-23, 1925-26, and 1927-28. In the latter years Central and Northern Queensland experienced one of the driest periods on record with a heavy mortality of stock.

The years in which the numbers of live stock attained their maxima are as follow :—Horses, 1918, 2,527,149; cattle, 1921, 14,441,309; sheep, 1932, 112,926,931; 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 seventy-two years in the manner shown in the succeeding table :—

LIVE STOCK PER HEAD OF POPULATION.—AUSTRALIA.

Year.	Horses.	Cattle.	Sheep.	Pigs.	Year.	Horses.	Cattle.	Sheep.	Pigs.
1860 ..	0.38	3.45	17.58	0.31	1920 ..	0.44	2.49	15.11	0.14
1870 ..	0.43	2.60	25.24	0.33	1928 ..	0.31	1.78	16.32	0.14
1880 ..	0.48	3.37	27.87	0.37	1929 ..	0.29	1.75	16.30	0.16
1890 ..	0.48	3.17	31.06	0.28	1930 ..	0.28	1.81	17.07	0.17
1900 ..	0.43	2.29	18.75	0.25	1931 ..	0.27	1.88	16.95	0.18
1910 ..	0.49	2.65	22.16	0.23	1932 ..	0.27	1.95	17.23	0.18

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, 1932.

States and Territories.	Horses.	Cattle.	Sheep.	Pigs.
New South Wales ..	1.71	10.15	173.54	1.25
Victoria ..	4.24	21.63	199.27	3.27
Queensland ..	0.67	8.26	31.79	0.32
South Australia ..	0.50	0.82	20.29	0.30
Western Australia ..	0.16	0.88	10.67	0.12
Tasmania ..	1.15	9.58	77.84	1.58
Northern Territory ..	0.06	1.49	0.03	0.00
Federal Capital Territory ..	1.00	4.94	228.04	0.06
Total ..	0.59	4.30	37.96	0.39

7. **Minor Classes of Live Stock.**—Excluding Victoria, details not being available, the numbers of minor classes of live stock returned for 1932 were as follow :—Goats, 149,414; camels, 5,770; mules and donkeys, 12,332; and ostriches, 106. Of these, goats were most numerous in Queensland; camels, mules and donkeys in Western Australia; and ostriches in South Australia. In the raising of goats, attention has in recent years been devoted to the angora goat and its product (mohair), and 7,664 angora goats are included in the total of 149,414 goats shown above. Of these, 3,157 were in New South Wales, 646 in Tasmania, 887 in Western Australia, 1,452 in South Australia, and 1,516 in Queensland, while the quantity of mohair produced in the latter State in 1932 was set down at 756 lb., and the number of skins placed on the market was returned as 166.

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 1928-29 to 1932-33 were as follow :—

NET EXPORTS OF PASTORAL PRODUCTS.—AUSTRALIA.

Products.	Unit of Quantity.	1928-29.	1929-30.	1930-31.	1931-32.	1932-33.
QUANTITIES.						
Animals (living)—						
Cattle	No.	8,452	6,191	174	331	189
Horses	"	5,356	5,969	4,926	4,771	3,227
Sheep	"	29,545	38,764	26,071	47,131	51,821
Bones	cwt.	14,000	10,503	12,238	9,416	8,299
Glue-pieces and Sinews	"	-18,420	-20,176	-15,927	186	495
Glycerine	lb.	-388,800	-703,682	-254,290	13,575	93,126
Hair	"	(a)	(a)	126,712	74,445	-121,363
Hoofs	cwt.	9,852	11,273	(a)	(a)	(a)
Horns	"	(a)	(a)	(a)	(a)	(a)
Meats—						
Frozen Beef	lb.	189,090,102	156,748,365	155,630,647	165,871,501	153,972,403
" Mutton and Lamb	"	84,905,335	100,410,080	109,252,956	165,281,142	166,797,195
" Rabbits and Hares	pair	3,598,075	3,873,337	(a)	(a)	(a)
" Other	lb.	7,127,553	6,115,445	6,920,925	8,061,876	9,579,958
Potted, and Extract of	lb.	(a)	(a)	(a)	(a)	7,212,976
Preserved in Tins, etc.	"	3,168,759	3,381,248	4,265,578	5,258,749	330,186
Other (excluding Bacon and Ham)	"	447,495	434,050	344,712	277,562	10,429
Sausage Casings	cwt.	31,489	30,984	8,976	11,562	
Skins—						
Hides	No.	816,980	702,135	(a)	(a)	(a)
Sheep	"	11,026,291	12,944,781	(a)	(a)	(a)
Rabbit and Hare	cwt.	100,655	77,566	63,348	69,774	77,873
Other (including Undressed Furs)	"	(a)	(a)	(a)	(a)	(a)
Tallow	cwt.	768,314	592,231	484,762	768,511	745,422
Wool—						
Greasy	lb.	759,443,979	696,578,126	767,050,003	772,804,985	848,468,549
Scoured	"	46,019,059	44,195,688	43,685,080	55,708,642	73,248,756
Tops	"	872,774	552,152	1,033,823	2,170,330	2,525,380

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 £252,123,849 for the period, or an average of £50,424,770 per annum, of which wool represents 78.53 per cent. Meat, skins, and tallow rank next in order of importance.

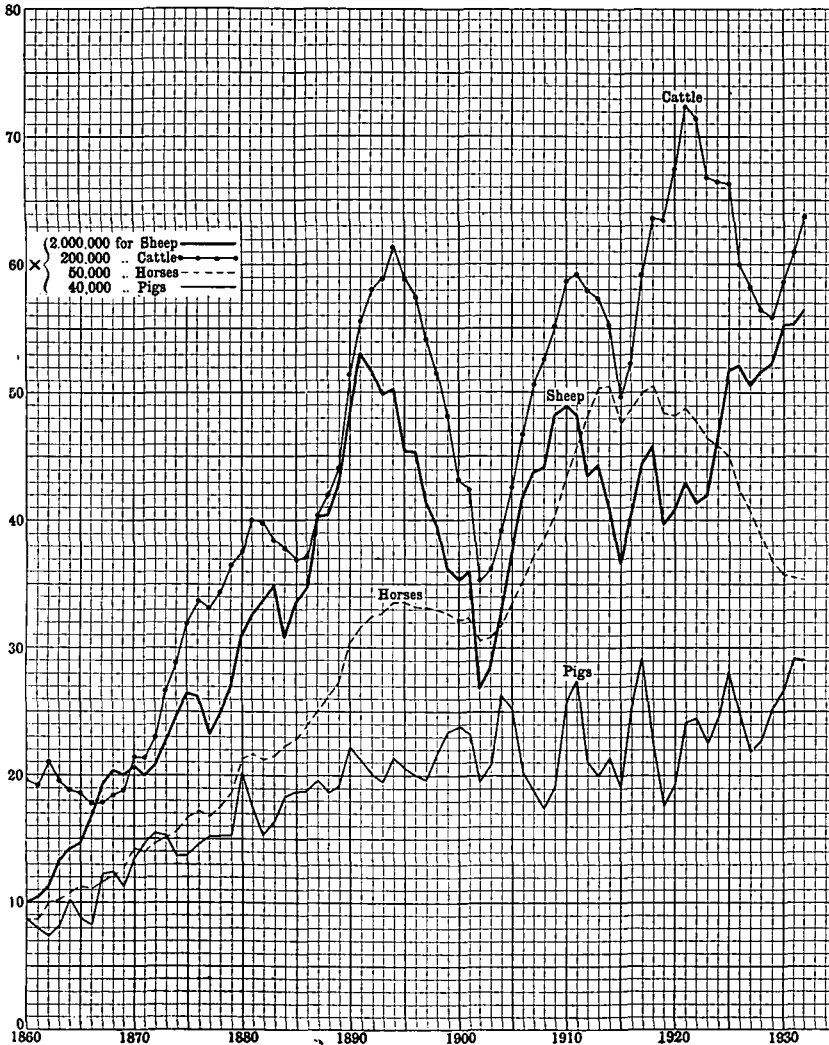
NET EXPORTS OF PASTORAL PRODUCTS.—AUSTRALIA.

Products.	1928-29.	1929-30.	1930-31.	1931-32.	1932-33.
VALUES.(a)					
Animals (living)—	£	£	£	£	£
Cattle	21,205	-19,814	-7,788	-5,673	-7,089
Horses	79,257	85,178	105,254	100,935	78,054
Sheep	43,447	35,681	3,346	8,496	12,654
Bones	10,775	8,015	8,702	6,725	5,199
Glue-pieces and Sinews	-6,956	-13,577	-13,232	1,610	2,489
Glycerine	-6,809	-15,167	-3,119	4,691	7,421
Hair	-35,660	-47,591	-9,209	-24,966	-53,063
Hoofs	6,162	7,128	4,412	4,750	4,330
Horns	24,385	22,626	18,164	14,815	12,771
Meats—					
Frozen Beef	2,888,284	2,569,782	2,235,526	2,087,812	1,854,569
" Mutton and Lamb	2,165,321	2,386,175	2,105,956	2,994,056	2,697,213
" Rabbits and Hares	331,456	339,917	412,845	478,946	559,367
" Other	180,422	152,319	149,643	151,793	170,462
Potted, and Extract of	-76,328	-52,491	6,981	5,174	-7,584
Preserved in Tins, etc.	84,029	118,513	138,253	135,805	183,539
Other (excluding Bacon and Ham)	11,086	8,695	7,490	6,098	7,710
Sausage Casings	144,063	245,246	159,913	56,701	44,002
Skins—					
Hides	886,430	459,192	517,132	62,762	52,995
Sheep	4,526,170	3,123,282	1,945,064	1,097,816	1,368,986
Rabbit and Hare	2,624,253	1,507,142	557,207	477,476	450,862
Other (including Undressed Furs)	277,477	586,842	175,095	304,696	-43,379
Tallow	1,366,341	981,454	597,594	827,454	788,395
Wool—					
Greasy	55,592,624	32,775,631	29,294,646	28,883,940	32,063,303
Scoured	5,519,161	3,563,207	2,469,360	2,817,703	3,952,313
Tops	166,957	87,781	114,021	248,055	271,993
Waste (b) .. ..	..	..	30,814	44,520	53,902
Waste (b) .. ..	..	..	9,487	7,940	20,030
Total Values	76,823,552	48,915,166	41,033,557	40,800,130	44,551,444

NOTE.—The minus sign — signifies net imports. (a) Australian currency values.

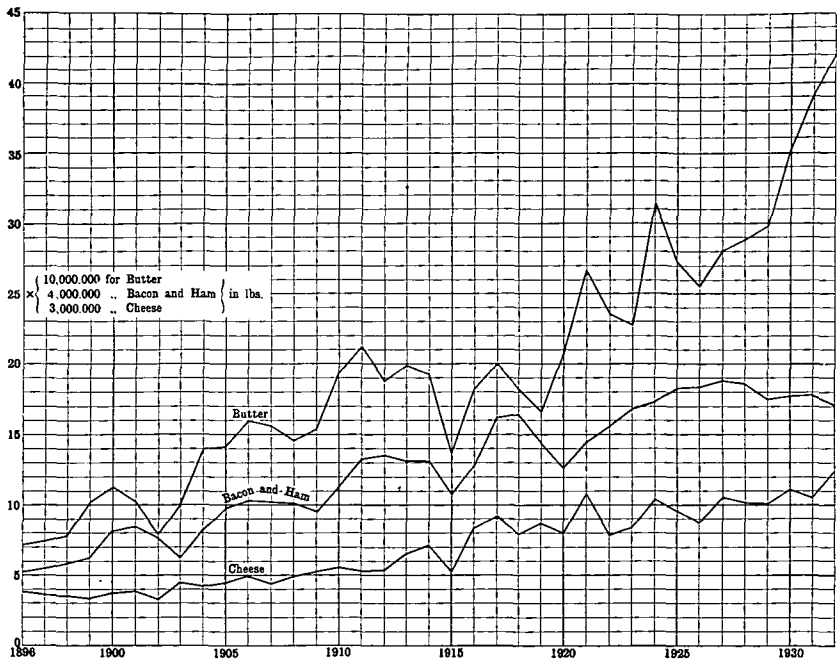
(b) Not available prior to 1930-31.

NUMBER OF HORSES, CATTLE SHEEP AND PIGS—AUSTRALIA 1860 TO 1932.



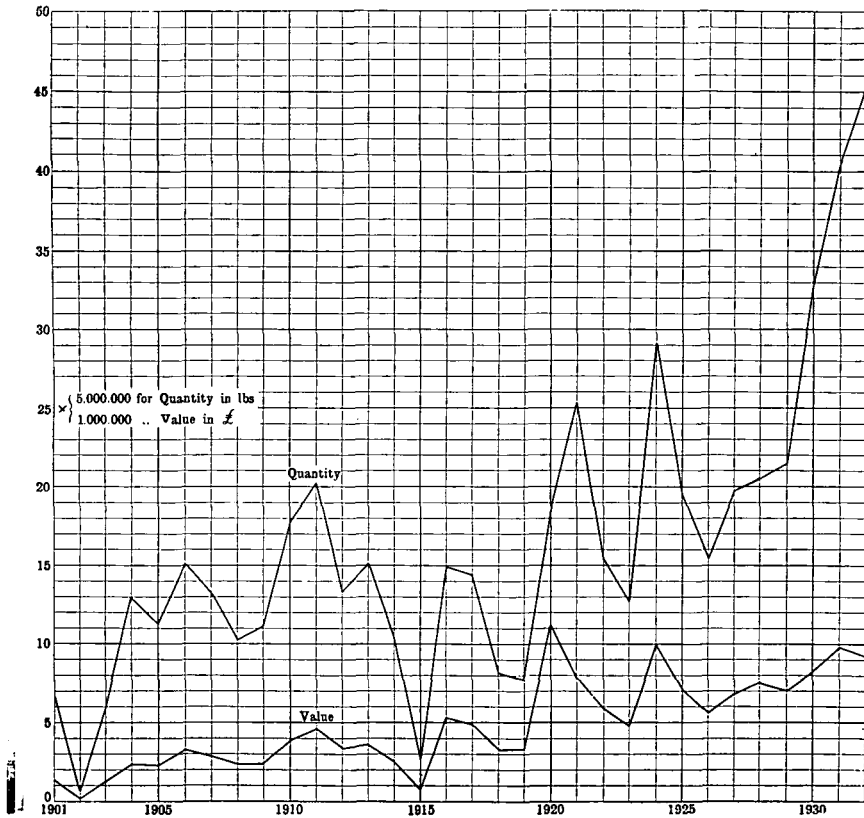
EXPLANATION.—The base of each small square represents an interval of one year, and the vertical side 2,000,000 in the case of sheep, 200,000 for cattle, 50,000 for horses, and 40,000 for pigs.

PRODUCTION OF BUTTER, CHEESE, AND BACON AND HAM—AUSTRALIA, 1896 TO 1932-33.



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 lb. In the case of bacon and ham 4,000,000 lb. and in the case of cheese 3,000,000 lb.

QUANTITY AND VALUE OF NET EXPORTS OF BUTTER FROM AUSTRALIA, 1901 TO 1932-33.



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

9. Value of Pastoral Production.—Details of the quantities and values of the items included in the value of pastoral production for the year 1932-33 are shown in the following table. The values quoted are the gross values computed on the wholesale prices prevailing in the principal markets of the respective producing States. They include marketing and transport charges, cost of containers and goods consumed in the process of production, but the omission of the local consumption of rabbits (meat and skins) and other pastoral by-products tends to reduce the exaggeration of the total gross value shown. It is not possible to determine with exactitude the value which accrues to those immediately concerned in the industry, i.e., workers of all grades; proprietors (including landlords) of the instruments of production concerned; providers of capital, including mortgagees, etc., but it is estimated that after eliminating the costs enumerated above the net return, omitting maintenance and depreciation, would approximate £45,500,000 :—

PASTORAL PRODUCTION.—AUSTRALIA, 1932-33.

Item.					Quantity.	Gross Value.
						£
Wool	lb.	1,061,672,628				38,599,500
Meats—						
Beef—						
Local Consumption (including Factories) ..	..	712,235,702				9,526,153
Exports of Carcasses .. .. .	..	153,972,800				1,854,582
Mutton and Lamb—						
Local consumption (including Factories) ..	..	607,458,167				6,798,525
Exports of Carcasses .. .. .	..	166,797,511				2,697,224
Rabbits and Hares (Export only)	pair	10,602,932				559,367
Other Meats, frozen and other (Export only) ..	..	(a)				179,589
Sausage Casings (Export only)	cwt.	25,257				211,958
Skins—						
Exports—						
Cattle and Calf	No.	504,410				301,789
Sheep .. .. .	..	10,595,492				282,953
Rabbit and Hare	cwt.	78,345				460,067
Other Furred .. .. .	..	(a)				215,986
Other Skins .. .. .	..	(a)				2,602
Consumption in Factories .. .. .	..	(a)				1,768,960
Tallow—						
Exports	cwt.	747,102				790,405
Local Consumption .. .. .	..	497,508				479,089
Hair, Horns, etc. (Export only) .. .. .	..	..				57,525
Net Exports of Live Stock .. .. .	..	..				64,913
					..	64,851,187

(a) Not available.

10. Consumption of Meats.—Particulars of the per capita consumption of meat in Australia are shown in the following table, together with figures for certain other countries. The figures have in each case been obtained from official sources, although it is not definitely known that they are all on a similar basis.

While the average consumption in Australia is considerably below that of New Zealand, it is greatly in excess of that of Canada, Great Britain and the United States. Compared with Australia the consumption of beef, mutton and lamb in these countries is relatively small, but pork consumption is greatly in excess of the average recorded both for Australia and New Zealand. The consumption of beef in North America and on the Continent of Europe has shown a downward tendency of recent years, while the figures for pork and mutton have increased considerably :—

MEATS.—PER CAPITA CONSUMPTION, AUSTRALIA AND OTHER COUNTRIES.

Description.	Australia, 1932-33.	New Zealand, (a)	Great Britain, 1931.	Canada, 1933.	United States of America, 1932.
	lb.	lb.	lb.	lb.	lb.
Beef and Veal	107.02	170.00	66.50	56.09	56.50
Mutton and Lamb	91.70	94.00	31.00	6.32	7.10
Pork	8.49	13.00	(b) 47.50	74.58	(c) 69.60
Total	207.21	277.00	145.00	136.99	133.20
Bacon and Ham	10.14	12.00	(d)	(d)	(d)
Total All Meats	217.35	289.00	145.00	136.99	(c) 133.20

(a) Average, three years ending 1931-32.
(d) Probably included with Pork.

(b) Including Lard.

(c) Excluding Lard.

§ 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 have been utilized to the fullest extent in breeding all classes of horses. 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 is highly regarded by the military authorities in India, and large numbers are obtained annually for remount purposes. During the war, Australian horses were found to stand up well to requirements, especially in Palestine and Sinai, where the rigours of the desert campaign severely tested their powers of endurance.

2. **Distribution throughout Australia.**—The States of New South Wales, Queensland and Victoria together depasture more than 76 per cent. of the total number of horses in Australia. In the following table figures are given for each State, etc., for each of the last five years :—

HORSES.—NUMBER.

Year.	N.S.W.	Vic. (b)	Q'land.	S. Aust.	W. Aust.	Tas.	N.T.	F.C.T.	Total.
1928	4567,371	412,867	522,490	205,865	160,876	34,908	37,452	a 924	1,942,753
1929	4534,945	393,015	500,104	189,054	159,528	34,336	33,703	a 929	1,845,614
1930	4524,512	379,872	480,970	183,529	156,973	32,700	33,363	a 815	1,792,734
1931	4524,751	375,459	468,603	185,222	156,489	30,659	33,442	b 925	1,775,550
1932	4528,943	372,907	451,644	190,222	157,443	30,269	33,072	b 937	1,765,437

(a) 30th June year following.

(b) 31st March year following.

The number of horses attained its maximum in Australia during 1918, when a total of 2,527,149 was recorded. Since that date, however, a general decline has been experienced, and the number for 1932 is the lowest returned since 1906. The numbers of horses in Australia and in the United States of America reached their maxima in 1918, while in Canada the highest total was recorded in 1921. The decline in each country since that year up to the latest available date amounted to 30, 44 and 13 per cent.

respectively. In Argentina on the other hand, a slight increase was recorded in 1930 over the numbers ascertained at the previous census of 1922. The rapid development of motor transport coupled with the use of petrol-driven cultivating and other machinery on farms brought about the decreases alluded to. In Australia, however, there has recently been a tendency to revert to the horse not only on the farm, but to some extent for the transport of goods in the cities. Confirmation of this fact is afforded by increases in 1932 in New South Wales, South Australia and Western Australia of 4,000, 5,000 and 1,000, respectively.

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

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 year 1932 were:—New South Wales, 29.97; Victoria, 21.12; Queensland, 25.59; South Australia, 10.77; Western Australia, 8.92; Tasmania, 1.71; Northern Territory, 1.87; and Federal Capital Territory, 0.05 per cent.

The percentages in the various States have remained practically constant during the last quinquennium.

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 per head of population has declined in all the statistical divisions since 1927. For the year 1932 the relative numbers were:—New South Wales, 0.20; Victoria, 0.21; Queensland, 0.48; South Australia, 0.33; Western Australia, 0.36; Tasmania, 0.13; Northern Territory, 6.78; Federal Capital Territory, 0.11; and Australia, 0.27.

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, is as follows:—

HORSES.—NUMBER IN PRINCIPAL COUNTRIES.

Country.	Year.	Number of Horses (,000 omitted).	Country.	Year.	Number of Horses (,000 omitted).
Soviet Union ..	1932	19,600	Sweden ..	1932	660
U.S. of America ..	1932	12,163	Uruguay ..	1930	623
Argentina ..	1930	9,858	Lithuania ..	1932	589
Brazil ..	1932	6,828	Spain ..	1931	563
Poland ..	1932	3,940	Turkey ..	1932	511
Germany ..	1932	3,395	Denmark ..	1932	496
Canada ..	1932	3,094	Bulgaria ..	1926	482
France ..	1932	2,901	Irish Free State ..	1932	446
India (British and (Native) ..	1931	2,337	Chile ..	1930	441
Rumania ..	1931	2,034	Peru ..	1929	432
Australia ..	1932	1,765	Haiti ..	1932	400
Japan ..	1931	1,477	Bolivia ..	1931	390
United Kingdom ..	1932	1,171	Latvia ..	1932	366
Yugoslavia ..	1932	1,157	Finland ..	1932	360
Mexico ..	1926	1,036	Greece ..	1932	324
Colombia ..	1931	1,000	Siam ..	1932	314
Italy ..	1930	943	Netherlands ..	1930	299
Hungary ..	1932	846	New Zealand ..	1932	281
Union of South Africa	1930	836	Belgium ..	1932	238
Cuba ..	1929	758	Paraguay ..	1926	210
Czechoslovakia ..	1932	706	French Morocco ..	1932	208
Dutch East Indies	1932	681	Estonia ..	1932	208

6. *Oversea Trade in Horses.*—(i) *Exports.* Australia's export trade in horses has fluctuated considerably since the war, and is now far below that of earlier years. For instance, during the period 1901–5 the average number exported was over 18,000, whereas during the last five years the figure was 5,000. The total number of horses exported during that period amounted to 25,352, valued at £756,919, equal to an annual average of 5,070 for £151,384. The average export price for the period was £29 17s. 2d. About 86 per cent. of the horses exported went to India, where they are largely used for army remounts.

(ii) *Imports.* The number of horses imported into Australia is comparatively small, consisting mainly of valuable stud animals from the United Kingdom and race horses from New Zealand. The average value per head of the horses imported during the last five years was £278 19s. 0d. The average number imported per annum was, however, only 221, and the average annual value, £61,648. The following table gives the imports, exports, and net exports of horses during each of the years from 1928–29 to 1932–33 :—

HORSES.—IMPORTS AND EXPORTS, AUSTRALIA.

Year.	Imports.		Exports.		Net Exports.	
	No.	Value.	No.	Value.	No.	Value.
		£		£		£
1928–29.. ..	339	95,025	5,695	174,282	5,356	79,257
1929–30.. ..	362	121,902	6,331	207,080	5,969	85,178
1930–31 (a) ..	101	40,094	5,027	145,348	4,926	105,254
1931–32 (a) ..	121	20,367	4,892	121,302	4,771	100,935
1932–33 (a) ..	180	30,853	3,407	108,907	3,227	78,054

(a) Australian currency values.

§ 3. Cattle.

1. *Purposes for which Raised.*—Cattle-raising is carried out in all the States, 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 in 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, beef-producing cattle are mainly raised in the tropical districts, *i.e.*, in the northern parts of Queensland, in the Northern Territory, and in the Kimberley district 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 decline in the frozen beef trade and the droughts of 1922–23 and 1925–26, which particularly affected the beef cattle areas of New South Wales and Queensland, were mainly responsible for the heavy decreases recorded in both these States during recent years. Since 1929 an increase of 500,000 has been recorded annually, half of which was due to expansion in the dairy herds.

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

CATTLE.—NUMBER.

Year.	N.S.W.	Vic. (b)	Q'land.	S. Aust.	W. Aust.	Tas.	Nor. Ter.	Fed. Cap. Ter.	Total.
1928	2,784,615	1,304,426	5,128,341	263,016	837,527	208,812	768,751	25,269	11,300,757
1929	2,686,132	1,335,242	5,208,588	204,516	836,646	214,643	711,607	24,760	11,202,134
1930	2,840,473	1,429,920	5,463,724	218,985	812,844	230,254	720,476	24,240	11,720,916
1931	2,993,586	1,637,530	5,550,399	265,324	826,532	232,444	749,745	25,395	12,260,955
1932	3,141,174	1,900,922	5,535,065	312,932	857,473	250,807	780,121	24,643	12,783,137

(a) 30th June year following.

(b) 31st March year following.

Although the proportion is not as high as it has been in the past Queensland was carrying 43.3 per cent. of the cattle in Australia in 1932.

The largest relative gain since 1927 occurred in Victoria, followed by Queensland and Tasmania; slight increases were recorded in the remaining States. The proportion in each of the States and Territories during 1932 was :—New South Wales, 24.57; Victoria, 14.87; Queensland, 43.30; South Australia, 2.45; Western Australia, 6.71; Tasmania, 1.96; Northern Territory, 6.10; Federal Capital Territory, 0.04.

3. Comparison with other Countries.—The following table shows the number of cattle in Australia, and in some of the principal cattle-raising countries of the world, at the latest available date :—

CATTLE.—NUMBER IN VARIOUS COUNTRIES.

Country.	Year.	No. of Cattle (,000 omitted).	Country.	Year.	No. of Cattle (,000 omitted).
India (British and Native)	1931	158,229	Kenya	1932	5,214
U.S. of America	1932	65,129	Siam	1932	4,972
Brazil	1931	42,539	Dutch East Indies	1931	4,681
Soviet Union	1932	40,700	Czechoslovakia	1932	4,341
Argentina	1930	32,212	Rumania	1932	4,189
Germany	1932	19,139	New Zealand	1932	4,072
France	1932	15,643	Cuba	1932	4,033
Australia	1932	12,783	Irish Free State	1932	4,025
Union of South Africa	1930	10,574	Yugoslavia	1932	3,812
Poland	1932	9,461	Spain	1931	3,654
Canada	1932	8,511	Denmark	1932	3,241
United Kingdom	1932	8,306	Rhodesia	1932	3,200
Colombia	1931	8,000	Sweden	1932	3,120
Uruguay	1932	7,372	Paraguay	1926	2,973
Italy	1930	7,089	Nigeria	1932	2,560
Madagascar	1932	6,575	Chile	1930	2,388
French Equatorial and West Africa	1932	5,960	Netherlands	1930	2,366
Mexico	1926	5,585	Austria	1930	2,313
Tanganyika Territory	1932	5,336	Venezuela	1922	2,278
Turkey	1932	5,315	Uganda	1932	2,152
			Bolivia	1931	2,064

4. Imports and Exports of Cattle.—The products of the cattle-raising industry figure largely in the export trade of Australia, although the export of live cattle has never been large. The number of cattle imported is also small, consisting, as in the case of horses, mainly of valuable animals for stud purposes. Details are as follow:—

CATTLE.—IMPORTS AND EXPORTS, AUSTRALIA.

Year.	Imports.		Exports.		Net Exports.	
	No.	Value.	No.	Value.	No.	Value.
		£		£		£
1928-29 ..	96	17,761	8,548	38,966	8,452	21,205
1929-30 ..	193	44,309	6,384	24,495	6,191	— 19,814
1930-31 (a) ..	81	11,368	355	3,580	274	— 7,788
1931-32 (a) ..	40	8,543	371	2,870	331	— 5,673
1932-33 (a) ..	98	12,464	287	5,375	189	— 7,089

(a) Australian currency values.

Note.—The minus sign (—) signifies net imports.

The average value of the cattle imported during the last five years was £185 18s. 4d. per head, while the average value of the cattle exported during the same period was £4 14s. 5d. As previously stated, the imported cattle were required principally for stud purposes.

5. Cattle Slaughtered.—The number of cattle slaughtered during each of the years 1928 to 1932 is given hereunder:—

CATTLE (INCLUDING CALVES) SLAUGHTERED.

Year.	N.S.W. (a)	Victoria. (a)	Q'land.	S. Aust.	W. Aust.	Tas. (a)	N. Ter.	Fed. Cap. Ter. (a)	Total.
1928	778,994	466,576	685,196	127,627	100,982	36,264	2,065	2,074	2,199,778
1929	680,316	387,662	630,620	117,806	91,195	35,278	1,531	2,143	1,946,551
1930	594,950	328,032	648,473	89,585	95,021	27,338	1,844	1,357	1,786,600
1931	630,372	375,380	540,649	81,285	91,748	28,565	1,844	1,349	1,751,192
1932	704,646	427,644	709,611	89,350	91,359	30,335	1,899	1,506	2,056,350

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

6. Production and Consumption of Beef.—The production of beef in Australia during the year 1932-33 was estimated at 866,208,500 lb. The requirements of the local market absorbed 706,798,000 lb., approximately 82 per cent., leaving a balance of 18 per cent., which was exported as frozen and canned beef. (See also § 1, *ante*.)

7. Export of Frozen Beef.—The export of frozen meat from Australia dates from about the year 1881, and since that year the trade in frozen beef has grown considerably, the quantities and values exported during the past five years being as follow, viz.:— 1928-29, 189,090,357 lb., £2,888,287; 1929-30, 156,748,665 lb., £2,569,788; 1930-31, 155,630,647 lb., £2,235,526; 1931-32, 165,872,145 lb., £2,087,829; and 1932-33, 153,972,800 lb., £1,854,582. (See Table § 1, No. 8.) The largest purchaser of Australian beef is the United Kingdom, which during the year 1932-33 took £1,489,183 worth, or about 80.3 per cent., of the total shipments. Other countries importing Australian beef were in order of importance Belgium, Egypt, Philippine Islands, Malta, Malaya (British), and Japan. These countries, together with the United Kingdom, accounted for 95.4 per cent. of the total exports.

The distance of Australia from the chief markets of the world has made it necessary that meat should be exported in a frozen condition. This circumstance, in view of the preference for chilled beef, has placed the beef industry in Australia at a serious disadvantage in the past. Investigations conducted by the Council for Scientific and Industrial Research in Australia and the Low Temperature Research Station at Cambridge in England have proved, however, that chilled beef can be successfully transported from Australia to the United Kingdom. Trial shipments of more than 254,000 lb. were made during 1932-33 while in 1933-34 the quantity exported exceeded 1,515,000 lb. The success of these shipments indicates the displacement of the frozen beef trade at no distant date and preparations are being made in Australia to meet the new conditions. The hope has been expressed that the regular shipment of high quality beef will enable Australia to successfully compete in the chilled beef trade. Shipping companies are effecting structural alterations to their vessels to permit of the carriage of chilled beef.

8. Agreements Regarding Meat at the Ottawa Conference.—A further stimulus to the Australian meat industry should result from the agreement at the Imperial Economic Conference at Ottawa in August, 1932, under the terms of which the Government of the United Kingdom undertook to regulate importations of foreign meat from 1st January, 1932, to 30th June, 1934, in accordance with the following Schedule :—

STATEMENT SHOWING THE MAXIMUM QUANTITIES OF FOREIGN MEAT TO BE ALLOWED TO BE IMPORTED INTO THE UNITED KINGDOM DURING EACH QUARTER OF THE PERIOD 1ST JANUARY, 1933, TO 30TH JUNE, 1934. EXPRESSED AS PERCENTAGES OF THE QUANTITIES IMPORTED IN THE CORRESPONDING QUARTERS OF THE TWELVE MONTHS ENDED JUNE, 1932.

Meat.	1933.				1934.	
	January-March.	April-June.	July-September.	October-December.	January-March.	April-June.
	%	%	%	%	%	%
Frozen Mutton and Lamb ..	90	85	80	75	70	65
Frozen Beef (Carcasses and Boned Beef)	90	85	80	75	70	65
Chilled Beef	100	100	100	100	100	100

Australia undertook to limit the export to the United Kingdom of frozen mutton and lamb during the year 1933 to a quantity equivalent to that exported during the year ended June, 1932, viz., 165,282,000 lb., while the export of frozen beef would not be increased during 1933 to an extent exceeding 10 per cent. of the quantity exported during 1931-32, viz., 165,872,000 lb. Thereafter, no restriction will be placed upon the importation of any meat from Australia into the United Kingdom during the currency of the agreed programme. It was agreed that from 30th June, 1934, the regulation of the imports of foreign meat is to be continued until 1938, at the rates in force for the quarter ended June, 1934, unless a permanent policy is agreed upon as a result of consultations which took place during 1933 between the Governments of the United Kingdom and Australia. Details of imports of beef, mutton and lamb into the United Kingdom during the period 1928 to 1932 will be found in the tables hereafter.

9. Imports of Chilled and Frozen Beef into the United Kingdom.—The following statement shows the quantities and values of chilled and frozen beef imported into the United Kingdom during each of the five years 1928 to 1932 :—

IMPORTS OF CHILLED AND FROZEN BEEF IN QUARTERS AND SIDES INTO THE UNITED KINGDOM.

Country of Origin.	1928.	1929.	1930.	1931.	1932.
--------------------	-------	-------	-------	-------	-------

CHILLED—QUANTITY.

	cwt.	cwt.	cwt.	cwt.	cwt.
Brazil	329,225	332,656	506,976	598,664	481,151
Uruguay	589,659	795,465	866,685	778,437	503,855
Argentina	8,644,551	8,174,800	7,713,349	7,911,175	7,804,366
Other Foreign Countries .. .. .	..	I	..	..	..
British	1,085	2,004	..	..	9,369
Total Chilled ..	9,564,520	9,304,926	9,087,010	9,288,276	8,798,741

CHILLED—VALUE.

	£	£	£	£	£
Brazil	812,048	881,278	1,276,361	1,160,043	980,342
Uruguay	1,456,834	2,075,707	2,197,906	1,589,591	986,489
Argentina	22,260,448	22,275,517	20,248,423	17,384,571	16,198,019
Other Foreign Countries .. .. .	..	4	..	..	..
British	2,244	4,121	..	..	13,807
Total Chilled ..	24,531,574	25,236,627	23,722,690	20,134,205	18,178,657

FROZEN—QUANTITY.

	cwt.	cwt.	cwt.	cwt.	cwt.
United States of America	166	173	..	..	..
Brazil	68,820	50,636	106,271	83,477	24,544
Uruguay	94,822	65,924	191,180	169,200	98,806
Argentina	288,474	346,619	256,502	197,895	149,800
Other Foreign Countries .. .. .	..	24,268	..	486	1,090
Australia	904,772	820,360	719,111	992,462	814,362
New Zealand	331,508	77,969	230,876	220,317	362,003
Other British Countries	121	7,347	11,133	1,288	1,244
Total Frozen ..	1,688,683	1,393,296	1,515,073	1,665,125	1,451,849
Grand Total ..	11,253,203	10,698,222	10,602,083	10,953,401	10,250,590

**IMPORTS OF CHILLED AND FROZEN BEEF IN QUARTERS AND SIDES
INTO THE UNITED KINGDOM—continued.**

Country of Origin.	1928.	1929.	1930.	1931.	1932.
FROZEN—VALUE.					
	£	£	£	£	£
United States of America ..	508	778	..	..	..
Brazil	136,487	110,242	226,617	149,606	47,788
Uruguay	225,884	169,468	476,559	349,300	183,109
Argentina	680,191	869,126	664,586	410,853	276,653
Other Foreign Countries ..	..	54,037	..	877	1,526
Australia	1,935,417	1,819,616	1,561,342	1,547,425	1,185,849
New Zealand	681,685	171,623	496,784	320,691	479,757
Other British Countries ..	298	16,280	22,470	2,503	2,282
Total Frozen ..	3,660,470	3,211,170	3,448,358	2,781,255	2,176,964
Grand Total ..	28,192,044	28,447,797	27,171,048	22,915,460	20,355,621

§ 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, while 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 premier position in sheep-raising. Within its borders is contained generally one half of the sheep of Australia, and in the years 1924 to 1927 even this high percentage was exceeded.

Fluctuations in the number of sheep recorded for each year in Australia from 1860 onwards may be seen from the graph accompanying this Chapter. Five marked periods of decline depleted the numbers at successive intervals, but these gaps were quickly restored. Since 1925 the sheep flocks have exceeded 100 millions, reaching 104,558,342 in 1929; 110,568,279 in 1930; and 112,926,931 in 1932, the latter figure constituting a record eclipsing the previous record of 110.6 millions in 1931. At no previous period have such large numbers been depastured continuously, and the development has taken place notwithstanding an annual slaughter of some twelve to nineteen million sheep and lambs for the mutton and lamb trade.

The number of sheep in the several States and Territories for each year from 1929 to 1932 with an estimate for the year 1933 is as follows:—

SHEEP.—NUMBER.

Year.	New South Wales.	Victoria. (c)	Queens- land.	South Australia.	Western Australia.	Tasmania.	Nor. Ter.	Fed. Cap.Ter.	Total.
1929	448,720,000	17,427,203	20,324,303	6,186,252	9,556,823	2,091,113	12,203	2240,445	104,558,342
1930	453,366,000	16,477,995	22,542,043	5,980,959	9,882,761	2,119,606	15,838	2183,077	110,568,279
1931	452,986,000	16,376,217	22,324,278	6,608,981	10,098,104	2,012,055	18,867	2194,391	110,618,893
1932	453,698,236	17,512,394	21,312,865	7,713,236	10,417,031	2,040,564	18,250	2214,355	112,926,931
1933 ^(b)	50,000,000	17,195,969	19,255,585	7,941,060	10,305,102	2,000,000	20,000	200,000	106,917,716

(a) 30th June year following.
year following.

(b) Estimate as at 31st December, 1933.

(c) 31st March,

3. **Proportion in the Several States and Territories.**—Apart from the effect of drought the relative number of sheep depastured in the different States show little change. All States, however, showed an increase in 1932 compared with 1928; the greatest occurring in Western Australia with 16 per cent., followed by Queensland 15 per cent.

The percentage distribution in 1932 was:—New South Wales, 47.55; Victoria, 15.51; Queensland, 18.87; South Australia, 6.84; Western Australia, 9.22; Tasmania, 1.81; Federal Capital Territory, 0.18 per cent.

4. **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. The following figures taken mainly from the Year Book of the International Institute of Agriculture represent the latest returns available in regard to the number of sheep in the principal wool-producing countries. The leading position is held by Australia, with nearly 113 millions, followed by the United States of America with 53 millions, the Soviet Union with 52 millions, and the Union of South Africa, 48 millions. For the years 1926 to 1929 the sheep flocks of the Soviet Union exceeded that of Australia; reaching its maximum in 1929 with nearly 134 millions. Since that year a remarkable decrease has been recorded; falling to 109 millions in 1930, to 78 millions in 1931 and to 52 millions in 1932. The figures for the last three years are inclusive of goats. No explanation of this large decrease is available, but it is known that heavy slaughterings have occurred as a protest by the peasants to the intensification of the Soviet collectivization plan. Russian sheep are almost entirely coarse-woolled and the poor quality wool does not ordinarily figure in world trade. Efforts are being made, however, by the Soviet Government to improve the quality of the wool and the quantity shorn per fleece, and to this end merino sheep were imported from America and Germany in 1927. In 1928–29, and 1929–30, 2,031 and 5,006 sheep, valued at £6,017 and £13,606, respectively, were exported from Australia to the Soviet Union for breeding purposes. As pointed out in sub-paragraph 5 following, however, the export of stud sheep is subject to control. Production of wool, in the Soviet Union, apparently, amounted to about 140 million lb. only during the year 1932. This represents an average weight of fleece shorn of about 3 lb., which is considerably less than half of that obtained in Australia:—

SHEEP.—NUMBER IN VARIOUS COUNTRIES.

Country.	Year.	No. of Sheep (,000 omitted).	Country.	Year.	No. of Sheep (,000 omitted).
Australia	1932	112,927	Yugoslavia	1932	8,510
United States of America	1932	53,155	French Morocco	1932	7,556
Soviet Union(a)	1932	52,100	Greece	1932	6,927
Union of South Africa	1930	48,358	Chile	1930	6,263
India (British and Native)	1930	44,628	Algeria	1932	5,269
Argentina	1930	44,413	Bolivia	1931	5,232
New Zealand	1932	28,692	Iraq	1932	4,307
United Kingdom	1932	27,204	Portugal	1925	3,721
Uruguay	1930	20,558	Canada	1932	3,644
Spain	1931	20,047	Irish Free State	1932	3,461
Rumania	1932	12,294	Germany	1932	3,405
Turkey	1932	11,768	Kenya	1930	3,227
Peru	1929	11,209	Tunis	1932	2,931
Brazil	1931	10,702	Mexico	1926	2,698
Italy	1930	10,268	Somaliland	1932	2,500
France	1931	9,762	Poland	1932	2,488
French Equatorial and West Africa	1932	9,598	Tanganyika Territory	1932	2,281
Bulgaria	1926	8,739	Sudan (Anglo-Egyptian)	1932	2,250
Persia	1931	8,544	Nigeria	1932	2,127
			Syria and Lebanon	1932	2,080
			Basutoland	1932	1,949

(a) Including goats.

5. **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 last five years the principal consignments of ordinary sheep have been made to Malaya (British) from the State of Western Australia. The purchases by buyers from New Zealand, South Africa, Soviet Union and Japan at the Australian Stud Sheep Sales during recent years opened up a regular export trade with these countries in stud sheep. On the 27th November, 1929, however, the export of stud sheep was prohibited, except with the approval of the Minister for Trade and Customs. Consequently exports declined during 1931-32, and amounted to 297 sheep only valued at £1,702, as compared with 6,389 valued at £32,933 in 1929-30. In 1932-33 exports increased to 968 sheep valued at £4,008, of which 850 sheep valued at £2,822 were shipped to Japan. The ordinary sheep exported from Australia are for the most part, to Malaya and the Pacific Islands. The following table shows the imports and exports of stud and ordinary sheep for the years 1928-29 to 1932-33 :—

SHEEP.—IMPORTS AND EXPORTS, AUSTRALIA.

Year.	Imports.		Exports.		Net Exports.	
	No.	Value.	No.	Value.	No.	Value.
		£		£		£
1928-29 ..	3,764	17,797	33,309	61,244	29,545	43,447
1929-30 ..	2,908	23,278	41,672	58,959	38,764	35,681
1930-31 (a) ..	1,417	10,868	27,478	14,214	26,061	3,346
1931-32 (a) ..	1,566	8,326	48,697	16,822	47,131	8,496
1932-33 (a) ..	1,725	9,843	53,546	22,497	51,821	12,654

(a) Australian currency values.

6. **Sheep Slaughtered.**—The number of sheep slaughtered in the several States during each of the years from 1928 to 1932 was as follows :—

SHEEP (INCLUDING LAMBS) SLAUGHTERED.

Year.	N.S.W. (a)	Victoria. (a)	Q'land.	S. Aust.	W. Aust.	Tas. (a)	Nor. Ter.	Fed. Cap. Ter.(a)	Total.
1928..	4,967,835	5,286,642	805,461	1,263,352	807,510	331,820	..	20,384	13,483,004
1929..	6,326,925	6,024,702	1,089,978	1,242,835	861,785	341,527	644	23,026	15,911,422
1930..	6,254,436	5,745,475	1,671,245	1,308,976	994,813	363,329	540	23,911	16,362,725
1931..	6,894,961	5,678,252	1,761,974	1,378,931	1,038,672	399,904	540	23,448	17,176,682
1932..	7,534,585	7,139,449	2,082,087	1,279,143	1,044,493	424,519	790	25,444	19,530,510

(a) Year ended 30th June year following.

7. **Production and Consumption of Mutton and Lamb.**—The production of mutton and lamb during the year 1932-33 amounted to 774,256,000 lb., of which 605,646,000 lb., or 78 per cent., was consumed locally, leaving a balance of 22 per cent. for exportation. See also § 1, No. 10.

8. **Exports of Frozen Mutton and Lamb.**—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 away

considerably during the war years, but a record export of 246,971,346 lb., valued at £5,482,564, was made in 1919-20, and in 1922-23 the shipments were valued at £4,321,917. Climatic conditions have since favoured a considerable output, and shipments have increased accordingly.

The quantity and value of the shipments during each of the last five years were as follow :—1928-29, 84,929,176 lb., £2,166,043; 1929-30, 100,411,243 lb., £2,386,186; 1930-31, 109,253,195 lb., £2,105,963; 1931-32, 165,281,336 lb., £2,994,062; 1932-33, 166,797,511 lb., £2,697,224. See Table § 1, No. 8.

As with beef, the principal customer in this trade is the United Kingdom, which absorbed almost 97 per cent. of the total quantity exported from Australia during the year 1932-33.

9. Resolutions at Ottawa Conference.—Reference has already been made to the agreement reached at the Imperial Economic Conference at Ottawa regarding the regulation of imports of meat into the United Kingdom. See § 3, 8 *ante*.

10. Imports of Frozen Mutton and Lamb into the United Kingdom.—The quantities and values of frozen mutton and lamb imported into the United Kingdom from various countries for the five years ended 1932 are given in the following table, viz. :—

IMPORTS OF FROZEN MUTTON AND LAMB INTO THE UNITED KINGDOM.

Country of Origin.	1928.	1929.	1930.	1931.	1932.
--------------------	-------	-------	-------	-------	-------

MUTTON—QUANTITIES.

	cwt.	cwt.	cwt.	cwt.	cwt.
Soviet Union	1,152	..	..	..	..
China .. .. .	..	4,681	..	..	..
Chile	223,693	192,017	202,715	125,907	151,195
Brazil	1,421	26,168	11,588	1,799	462
Uruguay	245,573	194,441	156,756	53,605	31,649
Argentina	706,145	654,865	656,685	485,350	354,233
Other Foreign Countries ..	902	1,803	2,641	124	286
Total, Foreign ..	1,178,886	1,073,975	1,030,385	666,785	537,825
Australia	211,681	128,858	254,238	502,211	190,952
New Zealand	962,891	883,789	1,172,262	1,105,105	1,335,884
Other British Countries ..	311	125	1,305	3	873
Total, British ..	1,174,883	1,012,772	1,427,805	1,607,319	1,527,709
Grand Total ..	2,353,769	2,086,747	2,458,190	2,274,104	2,065,534

IMPORTS OF FROZEN MUTTON AND LAMB INTO THE UNITED KINGDOM—
continued.

Country of Origin.	1928.	1929.	1930.	1931.	1932.
--------------------	-------	-------	-------	-------	-------

MUTTON—VALUE.

	£	£	£	£	£
Soviet Union	2,690	..	..	..	..
China .. ..	..	10,922	..	..	..
Chile	555,282	440,917	335,882	203,360	216,577
Brazil	3,941	56,985	29,466	3,038	659
Uruguay	590,242	486,818	366,746	103,301	58,559
Argentina	1,838,331	1,693,863	1,594,543	952,349	555,712
Other Foreign Countries ..	2,504	4,536	5,912	244	534
Total, Foreign ..	2,992,990	2,694,041	2,332,549	1,262,292	832,041
Australia	530,911	293,478	552,149	810,537	296,577
New Zealand	2,708,136	2,360,940	2,699,759	2,033,978	2,083,185
Other British Countries ..	721	347	3,752	8	1,621
Total, British ..	3,239,768	2,654,765	3,255,660	2,844,523	2,381,383
Grand Total ..	6,232,758	5,348,806	5,588,209	4,106,815	3,213,424

LAMB—QUANTITIES.

	cwt.	cwt.	cwt.	cwt.	cwt.
Iceland	8,383	10,980	16,910	18,097	30,661
United States	208	1,595	2,443	..	..
Chile	128,528	139,151	152,052	113,992	144,952
Brazil	723	1,002	15,785	10,362	4,841
Uruguay	157,823	172,316	266,571	230,695	131,220
Argentina	805,323	890,297	795,358	1,067,959	1,017,417
Other Foreign Countries ..	14	1,105	182	280	266
Total, Foreign ..	1,101,002	1,216,446	1,249,301	1,441,385	1,329,357
Australia	334,846	464,632	555,932	1,027,134	961,140
New Zealand	1,831,914	1,862,298	2,120,580	2,364,656	2,570,958
Other British Countries ..	236	785	905	..	85
Total, British ..	2,166,996	2,327,715	2,677,417	3,391,790	3,532,183
Grand Total ..	3,267,998	3,544,161	3,926,718	4,833,175	4,861,540

IMPORTS OF FROZEN MUTTON AND LAMB INTO THE UNITED KINGDOM—
continued.

Country of Origin.	1928.	1929.	1930.	1931.	1932.
LAMB—VALUE.					
	£	£	£	£	£
Iceland	34,864	31,026	50,177	45,310	58,784
United States	1,046	5,317	8,761	..	..
Chile	488,993	510,295	443,906	274,645	347,020
Brazil	2,392	3,429	51,500	24,319	4,046
Uruguay	511,805	573,966	820,209	603,981	315,141
Argentina	2,834,450	3,077,313	2,519,074	2,806,270	2,357,467
Other Foreign Countries ..	125	5,194	634	687	945
Total, Foreign ..	3,873,675	4,206,540	3,894,261	3,755,212	3,083,403
Australia	1,284,660	1,725,152	1,933,600	2,785,113	2,199,041
New Zealand	7,950,598	7,664,459	8,232,156	7,600,524	7,154,472
Other British Countries ..	737	4,007	3,339	..	290
Total, British ..	9,235,995	9,393,618	10,169,095	10,385,637	9,353,803
Grand Total ..	13,109,670	13,600,158	14,063,356	14,140,849	12,437,206

§ 5. Wool.

1. **General.**—Australia is the leading wool-growing country in the world. With less than one-sixth of the world's sheep, Australia produced in 1932-33, one-quarter of the world's supply. Moreover, half of the world's production of fine quality merino wool is produced in Australia. The bulk of the production is exported, but with the greater activity of Australian woollen mills the quantity used locally is increasing, nevertheless the amount so used represents under 6 per cent. of the total production.

The important position held by Australia among the principal sheep and wool producing countries of the world is more clearly shown in the following table :—

SHEEP AND WOOL—PRINCIPAL PRODUCING COUNTRIES.

Country.	Year.	No. of Sheep (in millions).	Wool Production (in millions of lb., greasy).
Australia	1932-33	112.9	1,061.6
United States	1932	51.6	411.3
Soviet Union	1932	52.1	306.1
Argentina	1932-33	(a)44.4	359.0
Union of South Africa ..	1932-33	(b)43.0	322.0
New Zealand	1932-33	27.8	288.4

(a) Year 1930.

(b) Estimate.

2. **Value.**—Wool is the chief factor in the pastoral wealth of Australia, and the nation's prosperity is largely dependent upon the satisfactory sale of the clip. The heavy decline in the price of wool which commenced in 1929-30 continued during the season 1932-33 and its effect upon the national income is reflected in the following figures. Based on the average auction room price of greasy wool the output for the season 1932-33

was valued at £38,599,500 compared with £70,833,000 for the clip of 1928-29, and £81,430,000 for 1924-25 when the record price was realized. On the average of the five seasons, 1927-28 to 1931-32, the annual clip was valued at £44,706,300. The average auction room price of greasy wool declined from 16.44d. per lb. in 1928-29 to 10.29d. per lb. in 1929-30, to 8.36d. in 1930-31, rose to 8.46d. in 1931-32, and in 1932-33 an increase to 8.72d. per lb. was recorded, leaving a fall of 47.0 per cent. since 1928-29. In 1933-34 a substantial increase in price took place when the price averaged 15.84d. per lb. for the year. This represents an increase of 81 per cent. over the previous year. and is slightly under the average of that for 1928-29. During the five years ended 1932-33 the export of wool averaged 39 per cent. of the value of the total shipments of merchandise of local origin from Australia (home produce), while during 1932-33 the proportion was 37.8 per cent.

3. **Greasy and Scoured Wool.**—Whether the weight of the wool clip should be stated as “in the grease” or as “scoured or washed” is a matter which seriously affects comparisons between the clips of different seasons and of different countries. The quantity of extraneous matter and grease in a fleece differs, not only between countries, but between districts in the same country. It fluctuates with the vagaries of the season, while it varies also with the breed and the condition of the sheep. There is, moreover, no clearly defined standard in regard to the cleanliness of wool described as scoured or washed. Consequently, any comparisons of the weight of the Australian clip for different years or seasons whether on a greasy or a scoured basis cannot be regarded as scrupulously exact. After extensive inquiry, however, by this Bureau it has been accepted that for the purpose of converting the Australian clip from the greasy to the clean category, the clean weight may be estimated at 46.15 per cent. of the greasy weight; in other words, 2½ lb. of greasy wool are equivalent to 1 lb. of clean wool.

The quantity of scoured or washed Australian wool exported during the last five years was approximately 13 per cent. of the total wool exports regarded as “greasy”.

4. **Production.**—(i) *Quantity.* The bulk of the Australian wool production is shorn from live sheep. Approximately 6 per cent. is obtained by fellmongering and about 4 per cent. is on exported skins. Statistics of wool production are compiled from data received from growers, fellmongers, etc. The following table gives the production for each of the last five seasons:—

WOOL.—TOTAL PRODUCTION.

State.	1928-29.	1929-30.	1930-31.	1931-32.	1932-33.
	lb.	lb.	lb.	lb.	lb.
New South Wales(a) ..	484,753,597	461,852,890	428,752,210	503,275,416	533,710,404
Victoria ..	179,854,306	160,662,578	146,862,612	159,721,916	170,807,900
Queensland ..	150,108,044	161,087,873	182,061,407	184,716,462	185,833,546
South Australia ..	74,616,004	67,300,881	63,478,524	67,021,312	75,727,946
Western Australia ..	63,890,984	72,562,594	76,951,500	77,985,741	81,307,832
Tasmania ..	14,900,000	14,100,000	14,000,000	13,875,000	14,250,000
Northern Territory(b)	30,000	30,000	35,000	35,000	35,000
Total ..	968,152,935	937,596,816	912,141,253	1,006,630,847	1,061,672,628

(a) Including Federal Capital Territory.

(b) Approximate figures.

(ii) *Estimate for 1933-34.* Although the returns are not yet complete, the total wool production of Australia during 1933-34 is estimated at 975,600,000 lb., valued at approximately £64,400,000 or 15.84d. per lb. in Australian currency.

5. **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.

6. **World's Wool Production.**—The following table gives details of the world's wool production as published by the Imperial Economic Committee. It shows the importance of Australia as a wool-producing country. Out of a total production of 3,734 million lb. in 1932, Australia produced 1,061.7 million lb. or 28.4 per cent. It is also interesting to note that the share of the British Empire in world production during the same year was 51.4 per cent. :—

WOOL.—WORLD'S PRODUCTION.

(In millions of lb., "greasy" basis.)

Countries.	Average Annual Pre-war Production. (a)	1928.	1929.	1930.	1931.	1932.
Australia ..	741.4	968.2	937.6	912.1	1,006.6	1,061.7
United States ..	314.1	366.5	382.2	412.2	438.3	411.5
Argentina ..	358.7	353.0	332.0	354.0	342.0	359.0
Union of South Africa	165.9	287.0	306.0	299.0	308.0	322.0
Soviet Union (Russia)	380.0	392.0	394.0	306.0	220.0	140.0
New Zealand ..	198.5	272.0	272.9	271.1	282.8	288.4
Uruguay ..	157.0	141.0	163.0	165.0	107.0	120.0
China (b) ..	100.0	120.0	120.0	120.0	120.0	120.0
United Kingdom ..	134.0	112.0	110.0	109.0	111.0	117.0
India (b) ..	100.0	100.0	100.0	100.0	100.0	100.0
Spain ..	72.0	84.8	83.3	80.5	77.5	80.5
Rumania ..	13.2	44.0	43.9	43.5	42.8	43.3
Persia ..	12.1	49.0	45.0	45.0	49.0	(b) 49.0
France ..	80.7	47.2	46.1	46.1	44.8	43.4
Turkey ..	118.0	42.4	35.4	36.8	41.3	41.3
Italy ..	55.0	52.0	50.0	48.0	44.0	42.0
Algeria ..	35.2	36.8	47.2	49.3	28.1	39.3
Chile ..	17.4	27.9	27.1	26.7	29.6	32.5
Brazil ..	35.0	30.5	31.0	31.5	32.0	(b) 32.0
Germany ..	52.0	33.7	32.0	32.4	32.4	31.3
Yugoslavia ..	25.4	27.1	27.0	27.1	27.8	29.5
Canada ..	11.2	19.6	20.3	21.0	20.4	20.5
Morocco (French) ..	14.9	21.7	23.9	21.5	17.9	20.0
Bulgaria ..	23.7	21.2	21.2	19.6	19.8	(b) 19.8
Irish Free State ..	..	18.0	18.6	18.9	19.3	19.6
Basutoland ..	..	12.7	12.9	9.7	9.3	11.8
Falkland Islands ..	..	3.9	4.1	3.7	3.9	3.9
Other Countries ..	71.2	191.0	187.6	171.9	179.2	134.7
Total ..	3,286.6	3,875.2	3,874.3	3,781.6	3,754.8	3,734.0

(a) Average for years 1909 to 1913 inclusive.

(b) Estimated.

7. **Wool Locally Used.**—The quantity of wool used locally, so far as can be ascertained, is shown in the following table. Precise details of consumption are difficult to obtain, but the quantities shown hereunder should closely approximate the truth :—

WOOL.—ESTIMATED CONSUMPTION OF GREASY WOOL—AUSTRALIA.

Particulars.	1928-29.	1929-30.	1930-31.	1931-32.	1932-33.
	lb.	lb.	lb.	lb.	lb.
Wool Consumption — in terms of Greasy ..	51,130,028	56,499,906	46,523,514	72,511,766	77,550,768

8. Export of Wool.—(i) *Greasy—Quantities.* Of the total weight of greasy wool shipped overseas during the last five years nearly 30 per cent. was sent to the United Kingdom, as compared with 38 per cent. dispatched in pre-war years. The other leading consignees since 1929–30 were Japan, France, Germany, Belgium, Italy and the United States of America, the principal continental countries taking 49.6 per cent., and America and Japan 20.5 per cent. of the total shipments. The following table shows the quantities of “greasy” wool exported, and the principal countries of destination :—

WOOL IN THE GREASE.—EXPORTS, AUSTRALIA.

Country to which Exported.	Average, Five Years, 1909–13.	1929–30.	1930–31.	1931–32.	1932–33.	Average for Five Years ended 1932–33.
	lb.	lb.	lb.	lb.	lb.	lb.
United Kingdom ..	212,004,088	202,438,310	228,196,396	256,845,443	244,011,182	228,705,294
France ..	149,835,946	172,783,716	147,453,999	116,355,296	122,536,429	146,227,178
Japan ..	7,262,683	83,243,431	151,201,649	185,672,264	196,847,697	143,611,460
Germany ..	106,344,696	94,962,530	104,320,246	80,865,488	111,763,527	98,309,008
Belgium ..	55,143,706	80,764,804	74,488,232	63,822,477	89,832,720	81,720,812
United States of America ..	15,486,447	19,346,569	20,378,195	9,362,688	5,500,120	14,748,361
Italy ..	4,381,197	35,582,700	37,724,169	56,740,272	63,099,517	46,650,180
Netherlands ..	(a)	770,940	956,029	461,462	2,255,552	948,007
India ..	425,547	948,394	466,704	673,314	1,210,144	940,630
Canada ..	126,653	310,185	23,735	102,134	112,292	163,853
Other Countries ..	5,830,377	8,249,325	3,759,976	4,626,184	12,758,245	9,348,057
Total ..	556,841,340	699,400,904	768,969,330	775,227,022	849,927,425	771,372,840

(a) Included in Other Countries.

(ii) *Scoured and Washed—Quantities.* The exports of “scoured and washed” wool during the period shown were as follow :—

WOOL, SCOURED AND WASHED (a).—EXPORTS, AUSTRALIA.

Country to which Exported.	Average Five Years 1909–13.	1929–30.	1930–31.	1931–32.	1932–33.	Average for Five Years ended 1932–33.
	lb.	lb.	lb.	lb.	lb.	lb.
United Kingdom ..	32,032,577	26,859,655	23,762,729	33,355,887	34,180,339	28,595,324
France ..	16,068,910	6,331,802	6,206,301	5,371,571	9,828,929	6,640,525
Japan ..	1,888,161	1,333,763	2,334,505	2,508,758	4,159,095	2,461,729
Belgium ..	7,528,058	4,382,722	5,255,927	6,007,231	10,101,445	6,546,990
Germany ..	12,310,967	3,964,028	5,174,277	4,883,089	9,019,009	5,315,043
United States of America ..	66,156	585,993	376,543	356,088	231,561	485,072
Canada ..	(b)	440,097	1,091,112	1,599,432	2,603,940	1,269,852
Italy ..	265,442	336,770	616,790	2,664,242	2,570,836	1,346,645
Netherlands ..	(b)	12,590	24,995	208,112	231,687	98,020
India ..	59,684	354,569	459,440	549,272	925,895	492,690
Other Countries ..	127,155	342,720	355,390	385,984	1,950,694	1,047,386
Total ..	70,347,110	44,944,799	45,658,009	57,889,666	75,803,430	54,299,276

(a) Including “tops.”

(b) Included with Other Countries.

The figures for “scoured and washed wool” include tops as follow :—in 1928–29, 872,774 lb., valued at £166,957; in 1929–30, 552,152 lb., valued at £87,871; in 1930–31, 1,033,913 lb., valued at £114,035; in 1931–32, 2,170,330 lb. valued at £248,055, and in 1932–33, 2,525,380 lb., valued at £271,993. See also § 1 No. 8. The total exports of wool tops during the last five years amounted to 7,154,549 lb., valued at £888,821, of which 3,830,284 lb., or more than 53 per cent., were shipped to Canada and 916,309 lb., or 12 per cent., to Japan.

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

WOOL EXPORTS.—TOTAL VALUE, AUSTRALIA.

Country to which Exported.	Average Five Years 1909-13.	1929-30.	1930-31.	1931-32.	1932-33.	Average for Five Years ended 1932-33.
	£	£	£	£	£	£
United Kingdom ..	10,608,967	12,648,045	10,257,653	11,841,995	11,479,976	13,235,072
France	6,494,832	8,075,006	5,479,746	4,004,983	4,996,227	6,884,341
Japan	516,528	4,434,746	6,478,587	7,513,519	7,969,600	7,017,930
United States of America ..	795,328	1,154,433	1,117,533	542,728	337,215	1,007,013
Germany	5,131,282	4,626,041	4,165,906	3,223,083	4,561,321	4,869,849
Belgium	2,546,915	3,316,902	2,623,906	2,284,555	3,376,311	3,607,199
Italy	202,434	1,641,166	1,482,943	2,174,633	2,567,680	2,177,245
Netherlands ..	(a)	44,661	41,616	36,651	119,867	53,921
Canada	6,765	82,850	109,280	178,703	241,346	145,221
India	22,308	74,292	41,839	64,638	94,509	77,216
Other Countries ..	267,283	502,968	205,182	237,408	663,881	670,970
Total ..	26,592,642	36,600,510	32,003,305	32,102,896	36,407,933	39,745,977

(a) Included with Other Countries.

9. *Average Export Value.*—The following table shows the average values per pound of Australian wool according to the export returns for the periods indicated. The values are based on the auction room price plus the cost of placing the wool on board ship :—

AUSTRALIAN WOOL.—EXPORT VALUE PER POUND.

Description.	Average Five Years 1909-13.	Average Five Years 1924-28.	1928-29.	1929-30.	1930-31.	1931-32.	1932-33.	1933-34.	Average Five Years 1930-34.
	d.	d.	d.	d.	d.	d.	d.	d.	d.
Greasy ..	9.40	19.63	17.58	11.30	9.16	8.97	9.07	16.26	10.86
Scoured ..	16.36	30.22	28.72	19.34	13.56	12.14	12.95	21.94	16.04

10. *Average Market Value.*—The following table gives details of the average price in Australia of greasy and scoured wool as compiled by the National Council of Wool-selling Brokers. In the matter of greasy wool the margin between the values shown and those of the previous table represents the cost of placing the wool on board ship. This cost includes delivery from store to ship, wharfage, buyers' commission, handling charges, and insurance after sale :—

WOOL.—AVERAGE MARKET VALUE PER LB.

Description.	1927-28.	1928-29.	1929-30.	1930-31.	1931-32.	1932-33.	1933-34.
	d.	d.	d.	d.	d.	d.	d.
Greasy ..	19.50	16.44	10.29	8.36	8.46	8.72	15.84
Scoured ..	32.21	28.12	18.69	13.74	12.65	14.08	24.00

11. *Exports and Local Sales of Wool.*—Approximately 90 per cent. of Australian wool is now disposed of locally prior to export. Buyers from the United Kingdom, France, Belgium, Germany, and other European countries, and from America, Japan, China, and India, attend the sales conducted in Sydney, Albury, Melbourne, Geelong, Ballarat, Brisbane, Adelaide, Perth, Hobart, and Launceston. Particulars regarding exports and local sales, as well as quantities and proportions of the various descriptions of wool marketed in each State, will be found in the Production Bulletins issued by this Bureau.

12. **The Wool Market.**—(i) *The 1932-33 Season.* The season 1932-33 was the fourth consecutive year of extremely low values. Average auction prices were 16.44d. per lb. in 1928-29, compared with 10.29d. in 1929-30, 8.36d. in 1930-31, a fall of 49.15 per cent. In 1931-32, however, there was an increase to 8.46d., and to 8.72d. in 1932-33. In view of the findings of the Committee referred to on the next page recent prices have provided no margin of profit for growers. Measured in terms of Australian, Sterling, and Gold currencies the approximate value of greasy wool per lb. was as follows:—

AVERAGE VALUE OF GREASY WOOL PER LB.—AUSTRALIA.

Year.			Australian Currency.	Sterling.	Gold Prices.
			d.	d.	d.
1929-30	..	..	10.29	10.29	10.29
1930-31	..	..	8.36	6.96	6.96
1931-32	..	..	8.46	6.69	5.10
1932-33	..	..	8.72	6.98	4.84
1933-34	..	..	15.84	12.65	8.19

The average values shown in sterling and gold currencies have been calculated by converting the average prices shown in Australian currency on the basis of the average rate of exchange between the months of September and June in each year. Though not exact these results will suffice for general purposes. The estimated value in Australian currency of the total wool production for the season 1932-33 was £38,599,500; as compared with £35,073,500 in 1931-32; £34,803,500 in 1930-31; and £81,430,000 during the record year of 1924-25.

During the year 1932-33, 3,059,555 bales, having a gross value of £35,043,054, or an average of £11 9s. 1d. per bale, were sold by auction in Australia. Compared with the previous year this showed an increase in local sales of 346,000 bales and an increase of £5,400,000 in gross value while the average price per bale rose by 10s. 8d. The total value of all wool sold in Australia in recent years commencing with the record year of 1927-28 is as follows:—1927-28, £60.9 million; 1928-29, £57.1 million; 1929-30, £33.9 million; 1930-31, £27.6 million; and 1931-32, £29.6 million.

(ii) *Wool Realization Scheme.* The affairs of the British-Australian Wool Realization Association have been liquidated and consequently references to its operations which appeared in previous Official Year Books are not repeated in this issue.

13. **United Kingdom Importation of Wool.**—The appended statement of the quantity and value of wool imported into the United Kingdom during the year 1932 from the principal wool-producing countries shows the important position which Australia occupied in the supply of wool to the mother country:—

WOOL (a).—IMPORTS, UNITED KINGDOM, 1932.

Country.		Quantity.	Value.	Country.		Quantity.	Value.
		lb.	£			lb.	£
Australia	..	302,005,300	11,268,432	Peru	..	3,787,300	122,766
Union of South Africa	..	211,269,000	8,183,938	Other British Possessions..	..	3,760,100	102,276
New Zealand	..	201,055,400	7,305,183	Falkland Islands	..	2,717,700	97,317
Argentina	..	90,378,200	2,115,824	Belgium	..	2,342,300	123,459
India	..	34,568,100	899,780	United States of America	..	1,090,500	36,710
Chile	..	24,819,400	769,949	Germany	..	798,800	33,831
Uruguay	..	16,247,200	521,318	Other Countries	..	4,665,100	114,085
France	..	12,935,300	650,390				
Irish Free State	..	5,868,100	137,485				
				Total	..	918,307,800	32,482,743

(a) Greasy, Scoured, and Tops.

Of the importations of wool into the United Kingdom, Australian wool represented 33 per cent. of quantity and 35 per cent. of value, and New Zealand 22 per cent. of quantity and 22 per cent. of value. Altogether, 761,243,700 lb., valued at £27,994,411, were received from British Possessions, these figures being equivalent to 83 per cent. of the total weight and 86 per cent. of the total value of all wool imported.

14. *Inquiry into Wool Industry.*—(i) *General.* A Committee under the chairmanship of the Honorable John Gunn was appointed by the Commonwealth Government on the 15th August, 1932, to inquire into and report on the condition of the Australian Wool Industry. The report of the Committee was presented on the 24th November, 1932. The inquiry covered costs of production, prices, etc., and recommendations were made for the rehabilitation of the industry.

(ii) *Costs of Production.* Information relating to costs of production was obtained by the Committee from 668 returns covering the operations of representative properties in all States, these properties carrying altogether about 8 million sheep. From the returns received a sufficient number to represent typical conditions in different areas was selected and the following data are based on these selected returns. It is claimed in the Report that the figures given are representative of typical average costs on medium and large properties under the favourable seasonal conditions experienced in 1931. One member of the Committee, however, did not accept the conclusions arrived at in determining the cost of production, and his objections were set out in a separate statement. It should be noted that the costs quoted refer to the production of wool only, as distinct from stock and other station produce.

AVERAGE COSTS ATTRIBUTABLE TO WOOL ONLY.

	Per lb. of Wool. d.
Expenses of production—	
Working Expenses excluding all Interest	6½
Annual Maintenance and Average Drought Expenses	1½
Total Wool Expenses at Sheep Properties	8½
Add Rail Freight, Handling and Selling Charges	1
Average Cost when sold	9½

The summary above does not take into account interest on borrowed capital or capital invested. This item at an average rate of interest of 5 per cent. on property valued at £3 per sheep area would amount to a further increase of 4½d. per lb. of wool making a total cost including all interest to the point of sale of 14d. per lb. No allowance has been made for management or the risk of investment in the industry.

(iii) *Recommendations.* Recommendations were made by the Committee with a view to reducing the gap between cost and price. The recommendations refer, amongst other things, to reductions in rail freights, State Government charges generally, Land Tax (Commonwealth and State), Private Business Charges generally, Interest Rates, and Handling and Selling Charges. The Committee also recommended (a) the formation of a Commonwealth Wool Executive, consisting of representatives of the wool-growers and wool-selling brokers; and (b) that the Commonwealth Government, by regulation or otherwise, should take to itself power to prohibit the export of wool, except on such conditions as may be prescribed, provided that such power should not be exercised except upon request of the Commonwealth Wool Executive.

The Australian Woolgrowers' Council in its Annual Report in June, 1933, gave general support to all of these recommendations with the exception of those relating to the establishment of a Commonwealth Wool Executive and the prohibition of the export of wool below a minimum reserve price.

Relief from those charges which come within the jurisdiction of the Commonwealth Government has been effected while assistance has been rendered by some of the States by means of reduction in rail freight and in taxation. In addition private business charges have been lowered to assist the industry, viz.:—reduction in handling and selling charges and in oversea freight rates. In common with other industries relief has been effected by the lowering of interest rates.

§ 6. Trade in Hides and Skins.

1. **Extent of Trade.**—In addition to the hides and skins treated locally, considerable quantities are exported, the value of cattle and horse hides, and sheep and other skins sent overseas during the five years 1928–29 to 1932–33 amounted to £24,211,243, or an average of £4,842,249 per annum.

2. **Sheepskins with Wool.**—Sheepskins with wool—the exports of which during the five years aggregated £12,086,210—constitute the largest item in the values referred to in the preceding paragraph. During the year 1932–33 France was the largest purchaser, taking 78 per cent. of the total consignments, while the United Kingdom ranked next with 14 per cent., followed by the United States with 4 per cent. The remaining 4 per cent. was shipped principally to Spain and Belgium. The exports of sheepskins with wool during each of the years from 1928–29 to 1932–33 were as follow :—

SHEEPSKINS WITH WOOL.—EXPORTS, AUSTRALIA.

Particulars.	1928–29.	1929–30.	1930–31.	1931–32.	1932–33.	Average for 5 Years.
Number ..	10,910,516	12,562,384	12,016,672	9,146,335	10,448,928	11,016,967
Value £	4,544,827	3,103,558	1,949,048	1,106,195	1,382,583	2,417,242

3. **Sheepskins without Wool.**—Sheepskins without wool are exported chiefly to the United Kingdom and the United States of America, the former taking 47 per cent. of the total exports while the latter took 43 per cent. France was next with nearly 9 per cent.; combined these three countries accounted for 99 per cent. of the total shipments. Quantities and values for the last five years are given in the table hereunder :—

SHEEPSKINS WITHOUT WOOL.—EXPORTS, AUSTRALIA.

Particulars.	1928–29.	1929–30.	1930–31.	1931–32.	1932–33.	Average for 5 Years.
Number ..	514,302	673,221	280,128	131,276	146,564	349,098
Value £	44,001	53,415	13,612	3,643	3,914	23,717

4. **Hides.**—(i) *Exports.* The export trade in cattle hides, which fell away during the war years, has again become important. Considerable quantities were shipped overseas during each of the last five years. In 1932–33 Italy took 29.8 per cent. of the total shipments, followed by the United Kingdom 29.2 per cent., Finland 11 per cent., Belgium 4 per cent., and Japan 4 per cent.

The exports during the last five years are given in the table below :—

CATTLE HIDES.—EXPORTS, AUSTRALIA.

Particulars.	1928–29.	1929–30.	1930–31.	1931–32.	1932–33.	Average for 5 Years.
Number ..	829,780	754,846	752,366	293,890	450,857	616,348
Value £	1,331,486	794,991	610,720	212,539	292,841	648,515

Calfskins exported during the years 1928–29 to 1932–33 numbered 1,035,784, valued at £264,241 and were shipped mainly to the United States of America, the value of the skins taken by that country averaging 63.6 per cent. of the total exports during the last five years. The annual export of horse hides is very small, and averaged only 8,367 hides, valued at £4,537.

(ii) *Imports.* The imports of cattle hides and calfskins are fairly large, the average value during the last five years amounted to £309,800. New Zealand is the chief source of supply, and small quantities are obtained also from the Pacific Islands, France, and Italy. The number and value of cattle hides, including calfskins, imported into Australia during the five years 1928-29 to 1932-33 were as follow :—

CATTLE HIDES.—IMPORTS, AUSTRALIA.

Particulars.	1928-29.	1929-30.	1930-31.	1931-32.	1932-33.	Average for 5 Years.
Number ..	363,400	340,150	(a)	(a)	(a)	(a)
Value (b) £	570,416	401,793	169,165	157,057	250,569	309,800

(a) Not available.

(b) Australian currency values.

The number of horse hides imported into Australia is small. The value of imports during the last five years averaged £366.

5. *Other Skins.*—The exports of skins other than those mentioned in the preceding sub-sections are valued as follow :—

OTHER SKINS.—EXPORTS, AUSTRALIA.

Description.	1928-29.	1929-30.	1930-31.	1931-32.	1932-33.	Average for Five Years ended 1932-33.
	£	£	£	£	£	£
Rabbit and Hare	2,630,295	1,526,242	570,240	488,736	460,182	1,135,139
Opossum ..	166,059	681,472	215,711	333,209	29,177	285,125
Kangaroo ..	207,532	193,385	127,932	96,997	74,389	140,047
Fox ..	132,771	115,241	47,787	56,435	105,356	91,518
Wallaby ..	87,299	38,714	25,012	7,848	6,826	33,140
Other ..	20,839	19,281	7,230	2,509	2,238	10,420
Total ..	3,244,795	2,574,335	993,912	985,734	678,168	1,695,389

The United States of America and the United Kingdom were the chief purchasers of these skins, as shown below :—

OTHER SKINS.—AVERAGE EXPORTS TO UNITED STATES AND UNITED KINGDOM 1928-29 TO 1932-33.

Description.	United Kingdom.	United States of America.
	£	£
Rabbit and Hare	448,465	587,865
Opossum	225,425	34,422
Kangaroo	14,776	123,352
Fox	60,968	26,231
Wallaby	24,898	6,572
Other	2,736	3,852
Total	777,268	782,294