

CHAPTER XIX.

PASTORAL PRODUCTION.

§ 1. Initiation and Growth of Pastoral Industry.

1. **Early Statistics.**—The live stock which Captain Phillip brought with him when establishing the first settlement in Australia, in January, 1788, is stated to have comprised seven horses, six cattle, twenty-nine sheep, twelve pigs and a few goats. Later in the same year, in a letter from Captain Phillip to Lord Sydney, then Secretary of State for the Colonies, an enclosure sets forth the numbers of each kind of live stock in the colony on 1st May, 1788. These details together with those of later enumerations are shown in the following table :—

LIVE STOCK.—AUSTRALIA.

Date.	Horses.	Cattle.	Sheep.	Pigs.	Goats.
1st May, 1788	7	7	29	74	19
10th November, 1791	4	18	57	37	(c)
1st July, 1794	(a) 20	40	576	(c)	522
15th June, 1795	(b) 49	176	832	(c)	985
1st September, 1796	57	227	1,531	1,869	1,427
15th August, 1800	203	1,044	6,124	4,026	2,182

(a) Not including three asses.

(b) Not including seven asses.

(c) Not stated.

The return for the year 1788 includes, in addition to poultry, five rabbits.

2. **Subsequent Statistics.**—The statistical returns of live stock in Australia subsequent to the year 1800 referred mainly to those in possession of the Government, omitting those owned by individuals. Doubtless the growth of population, the expansion of the area settled and the increase of private ownership made it difficult in those early times to secure accurate returns. The figures continued to be somewhat defective up to 1860, but 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 1929 onwards in single years, are given in the following table, and are shown continuously in the graphs hereinafter.

During the seventy-four years covered by the table the live stock of Australia increased considerably, horses 310 per cent. ; cattle 252 per cent. ; sheep 461 per cent. ; and pigs 230 per cent. The average annual increases which these aggregates represent are as follows :—Horses, 1.92 per cent. ; cattle, 1.73 per cent. ; sheep, 2.36 per cent. ; and pigs, 1.63 per cent.

LIVE STOCK.—AUSTRALIA.

31st December.				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	..	..	..	1,068,774	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
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
1933	..	..	..	1,763,225	13,512,486	109,921,053	1,046,867
1934	..	..	..	1,767,758	14,048,671	113,048,037	1,158,274

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, 1918, 1919, 1922-23, 1925-26 and 1927-28.

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, 1934, 113,048,037; and pigs, 1917, 1,169,365.

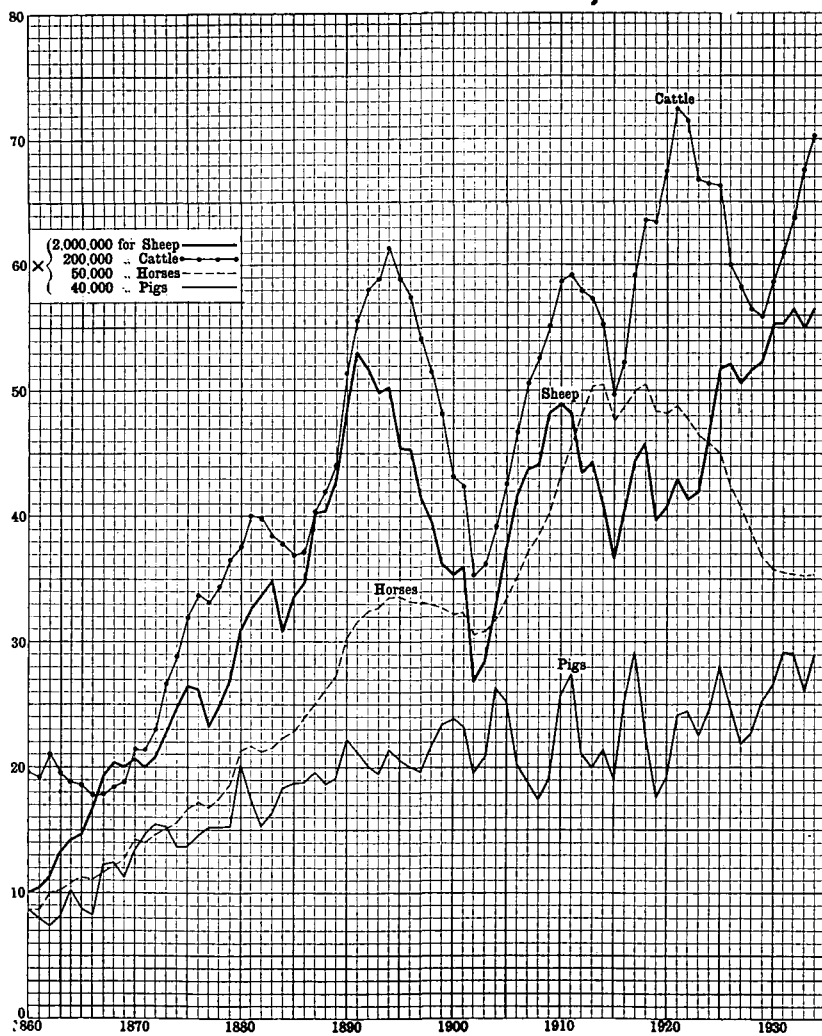
5. **Live Stock in Relation to Population.**—The number of each kind of live stock per head of the population of Australia has varied during the past seventy-four years in the manner shown in the succeeding table:—

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	1930	..	0.28	1.81	17.07	0.17
1880	..	0.48	3.37	27.87	0.37	1931	..	0.27	1.88	16.95	0.18
1890	..	0.48	3.17	31.06	0.28	1932	..	0.27	1.95	17.23	0.18
1900	..	0.43	2.29	18.75	0.25	1933	..	0.26	2.03	16.52	0.16
1910	..	0.49	2.65	22.16	0.23	1934	..	0.27	2.11	16.97	0.17

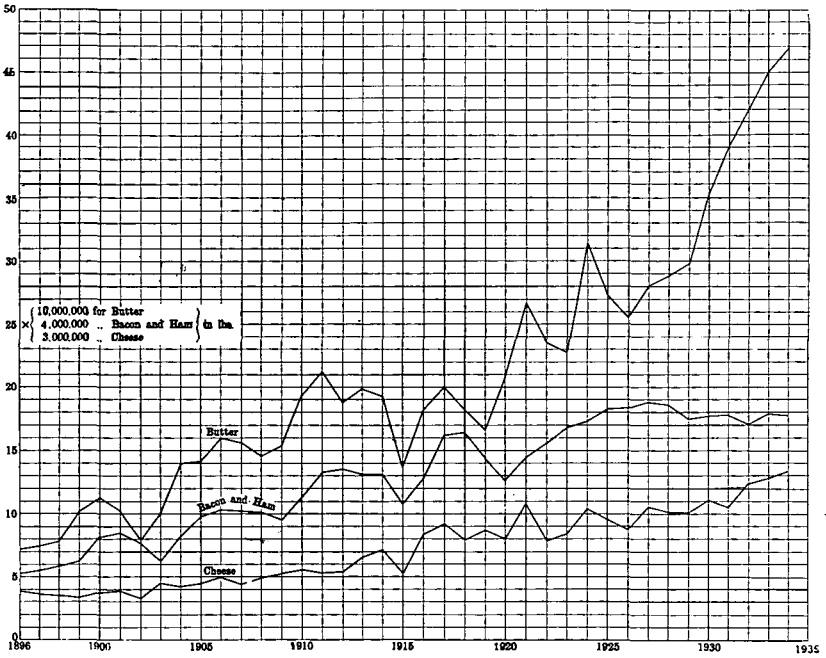
6. **Live Stock in Relation to Area.**—The numbers of live stock per square mile in the several States and Territories of Australia are given in the following table:—

NUMBER OF HORSES, CATTLE, SHEEP AND PIGS—AUSTRALIA, 1860 TO 1934.



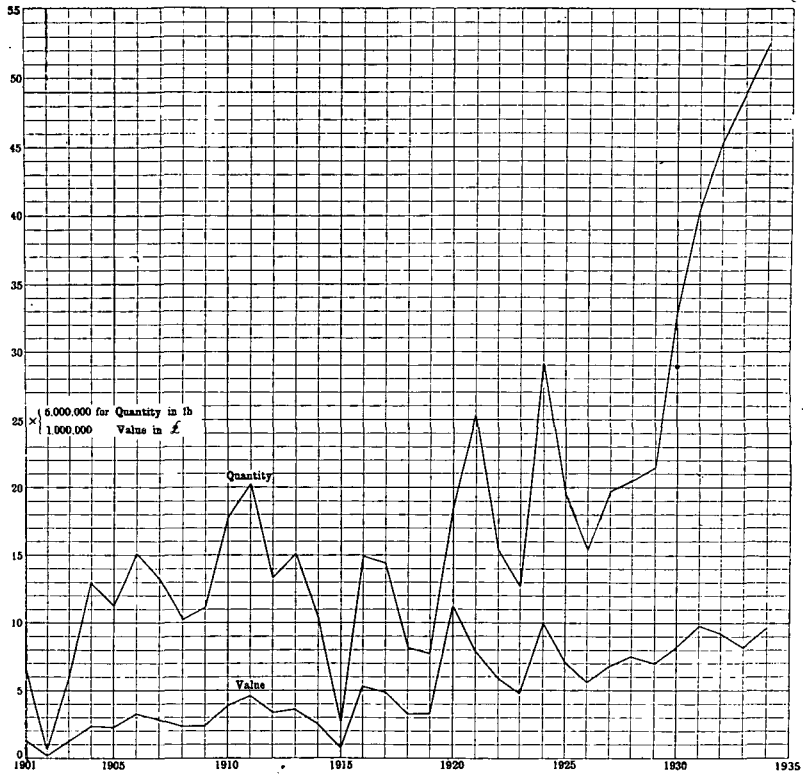
EXPLANATION.—The base of each small square represents an interval of one year and the vertical side 2,000,000 in the case of sheep, 200,000 for cattle, 50,000 for horses, and 40,000 for pigs.

PRODUCTION OF BUTTER, CHEESE, AND BACON AND HAM—AUSTRALIA, 1896 TO 1934-35



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 1934-35.



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.

LIVE STOCK PER SQUARE MILE, 1934.

State or Territory.	Horses.	Cattle.	Sheep.	Pigs.
New South Wales	1.73	11.26	172.34	1.28
Victoria	4.07	23.73	190.97	3.02
Queensland	0.67	9.03	32.18	0.40
South Australia	0.52	0.91	20.71	0.23
Western Australia	0.17	0.93	11.47	0.10
Tasmania	1.17	9.98	77.76	1.54
Northern Territory	0.07	1.72	0.04	0.00
Federal Capital Territory	1.14	8.97	233.34	0.69
Total	0.59	4.72	38.00	0.39

7. Minor Classes of Live Stock.—Excluding Victoria, details not being available, the numbers of minor classes of live stock returned for 1934 were as follows—Goats, 151,858; camels, 4,514; mules and donkeys, 13,604; and ostriches, 44. 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, some attention has been devoted to the angora goat and its product (mohair), and 6,414 angora goats are included in the total of 151,858 goats shown above. Of these, 2,043 were in New South Wales, 1,089 in Queensland, 1,863 in South Australia, 692 in Western Australia, 710 in Tasmania and 7 in the Federal Capital Territory, while the quantity of mohair produced in Queensland in 1934 was set down at 267 lb., and the number of skins placed on the market was returned as 98.

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 1930-31 to 1934-35 were as follows:—

NET EXPORTS OF PASTORAL PRODUCTS.—AUSTRALIA.

Product.	Unit of Quantity.	1930-31.	1931-32.	1932-33.	1933-34.	1934-35.
QUANTITIES.						
Animals (living)—						
Cattle	No.	174	331	189	115	63
Horses	"	4,926	4,771	3,227	3,249	4,123
Sheep	"	26,071	47,131	51,821	42,914	58,182
Bones	cwt.	12,238	9,416	8,299	8,737	10,207
Glue-pieces and Sinews	"	—15,927	186	493	—288,222	1,251
Glycerine	lb.	—254,290	13,575	93,126	—288,222	—9,282
Hair	"	126,712	74,445	—121,363	—119,775	—559,673
Hoofs	cwt.	(a)	(a)	(a)	(a)	(a)
Horns	"	(a)	(a)	(a)	(a)	(a)
Meats—						
Frozen Beef (b)	lb.	155,630,647	165,871,501	153,972,403	173,076,002	212,099,100
" Mutton and Lamb	"	109,252,956	165,251,142	166,797,195	171,106,849	196,192,828
" Rabbits and Hares	pair	(a)	(a)	(a)	(a)	(a)
" Other	lb.	6,920,925	8,061,876	9,579,590	12,214,574	15,012,149
Potted, and Extract of	"	(a)	(a)	(a)	(a)	(a)
Preserved in Tins, etc.	lb.	4,205,578	5,258,749	7,212,976	4,620,270	5,941,584
Other (excluding Bacon and Ham)	"	344,712	277,562	330,186	466,613	408,396
Sausage Casings	cwt.	8,976	11,562	10,429	19,361	14,543
Skins—						
Hides	No.	(a)	(a)	(a)	(a)	(a)
Sheep	"	(a)	(a)	(a)	(a)	(a)
Rabbit and Hare	cwt.	63,348	69,774	77,873	99,339	84,744
Other (including Undressed Furs)	"	(a)	(a)	(a)	(a)	(a)
Tallow	cwt.	484,762	768,511	745,422	471,591	822,751
Wool—						
Greasy	lb.	767,050,003	772,804,985	848,468,549	728,676,211	782,278,901
Scoured	"	43,685,080	55,708,642	73,248,756	72,670,544	66,408,783
Tops	"	1,033,823	2,170,330	2,525,380	2,923,974	3,104,232
Nolls	"	(a)	952,413	1,208,204	1,011,741	1,303,616
Waste	"	(a)	366,484	738,201	837,184	1,067,598

NOTE.—The minus sign (—) signifies net imports. (a) Quantity not available. (b) Including chilled beef from 1932-33.

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 £244,608,230 for the period, or an average of £48,921,646 per annum, of which wool represents 77.16 per cent. Meat, skins and tallow rank next in order of importance.

NET EXPORTS OF PASTORAL PRODUCTS.—AUSTRALIA.

Product.	1930-31.	1931-32.	1932-33.	1933-34.	1934-35.
VALUES. (a)					
	£	£	£	£	£
Animals (living)—					
Cattle	— 7,788	— 5,673	— 7,089	— 27,300	— 26,491
Horses	105,254	100,935	78,054	35,646	— 15,631
Sheep	3,346	8,496	12,054	14,440	30,118
Bones	8,702	6,725	5,199	6,058	7,406
Glue-pieces and Sinews	— 13,232	1,610	2,489	1,128	2,908
Glycerine	— 3,119	4,691	7,421	1,172	4,962
Hair	— 9,209	— 24,966	— 53,063	— 58,098	— 81,902
Hoofs	4,412	4,750	4,330	5,755	6,092
Horns	18,164	14,815	12,771	14,301	18,083
Meats—					
Frozen Beef	2,235,526	2,087,812	(b)1,854,569	(b)2,020,049	(b)2,559,605
" Mutton and Lamb	2,105,956	2,994,056	2,097,213	3,575,827	4,475,565
" Rabbits and Hares	412,845	478,946	559,367	425,665	443,484
" Other	149,643	151,793	170,462	216,428	266,167
Potted, and Extract of	6,981	5,174	— 7,584	— 29,452	— 29,507
Preserved in Tins, etc.	138,253	135,805	183,539	130,996	152,880
Other (excluding Bacon and Ham)	7,490	6,098	7,710	10,881	7,649
Sausage Casings	159,913	56,701	44,002	184,373	106,210
Skins—					
Hides	517,132	62,762	52,995	119,344	147,782
Sheep	1,945,064	1,097,816	1,368,086	2,624,990	1,753,908
Rabbit and Hare	557,207	477,476	450,862	949,819	867,068
Other (including Undressed Furs)	175,095	304,696	— 43,370	99,772	— 32,942
Tallow	597,594	827,454	788,395	476,309	922,505
Wool—					
Greasy	29,294,646	28,883,940	32,063,303	49,463,224	34,095,191
Scoured	2,460,360	2,817,703	3,952,313	6,646,248	4,598,459
Tops	114,021	248,055	271,993	434,472	331,833
Noils	30,814	44,520	53,902	121,445	75,950
Waste	9,487	7,940	20,030	32,220	39,935
Total Values	41,033,557	40,800,130	44,551,444	67,495,712	50,727,387

NOTE.—The minus sign (—) signifies net imports.
(b) Including chilled beef.

(a) Australian currency values.

9. Value of Pastoral Production.—Owing to the lack of uniformity in the several States in determining prices and costs the values of pastoral production hitherto presented have been gross values at the principal markets in the respective producing States.

Attempts were made at successive conferences of Australian Statisticians to obtain net values of production, and finally in March, 1935, a uniform method was agreed upon. The following table has been compiled on the lines adopted by the Conference, and represents in its final column a net value of pastoral production for each State and the Commonwealth. The table has been prepared by the State Statistical Bureaux from data obtained by actual collections wherever possible and by careful estimates from the most reliable sources.

Maintenance costs have not been computed in all of the States and depreciation has not been deducted; consequently the net value of production is inflated to the extent of these costs. In Queensland the costs of production are not yet as exact as might be desired. Production values of the pastoral and other industries are dealt with more fully in Chapter XXVIII.—Miscellaneous.

GROSS, LOCAL AND NET VALUE OF PASTORAL PRODUCTION, 1934-35.

State.	Gross Production valued at Principal Markets.	Marketing Costs.	Gross Production valued at Farm.	Farm Costs.		Net Value of Production. (a)
				Fodder fed to Farm Stock.	Value of other materials used in process of Production.	
	£	£	£	£	£	£
New South Wales ..	27,041,000	3,110,000	23,931,000	448,000	172,000	23,311,000
Victoria ..	14,969,013	1,279,904	13,689,109	280,000	104,000	13,305,109
Queensland ..	12,892,180	1,388,045	11,504,135	300,000	200,000	11,004,135
South Australia ..	3,852,859	533,021	3,319,838	60,855	77,698	3,181,285
Western Australia ..	4,664,376	569,523	4,094,853	164,621	13,952	3,916,280
Tasmania ..	1,227,700	106,200	1,121,500	61,040	19,770	1,040,690
Total ..	64,647,128	6,986,693	57,660,435	1,314,516	587,420	55,758,499

(a) No deduction has been made for depreciation and maintenance.

Although depreciation has not been deducted in arriving at the net value of production this item was compiled in each State for 1934-35 and amounted in the aggregate to £475,912.

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.

The average consumption in Australia is somewhat below that of New Zealand, but 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. There is evidence of a decline in the consumption of beef and a change over to mutton and pork both in countries which formerly consumed more beef than pork and in those where pork has been the chief diet. This is noticeable chiefly in the United States, Germany and other Northern European countries. The consumption of meat as a whole appears to have declined slightly in many countries during the past decade, although the per capita consumption in Great Britain increased from 137 lb. in 1924 to 144 lb. in 1933.

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

Description.	Australia, 1934-35.	New Zealand, (a)	Great Britain, 1933.	Canada, 1934.	United States of America, 1933.
	lb.	lb.	lb.	lb.	lb.
Beef and Veal	120.93	117.00	62.80	68.66	54.20
Mutton and Lamb	77.44	110.00	(d) 31.10	6.28	7.00
Pork	9.31	6.00	(b) 47.80	66.36	72.20
Total	207.68	233.00	141.70	141.30	133.40
Bacon and Ham	10.36	11.00	(c)	(c)	(c)
Total All Meats	218.04	244.00	141.70	141.30	133.40

(a) Average, three years ending 1933-34. with Pork. (d) 1934-35.

(b) Including Lard.

(c) Probably Included

§ 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 considerable numbers are purchased each year for remount purposes, although the demand is not so great as in former years.

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.

31st Dec.	N.S.W. (b)	Vic. (b)	Q'land.	S. Aust.	W. Aust.	Tas.	N.T.	F.C.T. (b)	Total.
1930	4524,512	379,872	480,970	183,529	156,973	32,700	33,363	a 815	1,792,734
1931	524,751	375,459	468,603	185,222	156,489	30,659	33,442	925	1,775,550
1932	528,943	372,907	451,644	190,222	157,443	30,269	33,072	937	1,765,437
1933	532,028	361,005	448,918	196,789	159,646	30,299	33,590	950	1,763,225
1934	534,853	357,877	447,804	198,765	161,636	30,662	35,094	1,067	1,767,758

(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. 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 the years mentioned up to the latest available date amounted to 30, 45 and 19 per cent. respectively. In Argentine Republic 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. Although not of large dimensions, increases have been recorded in New South Wales and South Australia during each of the last four years and in Western Australia during the last three years, while the total for Australia in 1934 represents the termination of a continuous decline which began as far back as 1918.

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 1934 were :—New South Wales, 30.26 ; Victoria, 20.25 ; Queensland, 25.33 ; South Australia, 11.24 ; Western Australia, 9.14 ; Tasmania, 1.73 ; Northern Territory, 1.99 ; and Federal Capital Territory, 0.06 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 1934 the relative numbers were:—New South Wales, 0.20; Victoria, 0.20; Queensland, 0.47; South Australia, 0.34; Western Australia, 0.37; Tasmania, 0.13; Northern Territory, 7.17; 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 ..	1934	15,649	Sweden	1934	609
U.S. of America ..	1934	11,861	Lithuania	1934	571
Argentine Republic	1930	9,858	Cuba	1934	569
Brazil	1931	6,828	Spain	1933	568
Poland	1934	3,764	Turkey	1934	563
Germany	1934	3,360	Denmark	1934	506
Canada	1934	2,933	Bulgaria	1926	482
France	1934	2,838	Chile	1930	441
India (British and Native)	1933	2,345	Peru	1929	432
Rumania	1932	2,034	Irish Free State	1934	429
Mexico	1930	1,887	Haiti	1934	400
Australia	1934	1,768	Bolivia	1931	390
Japan	1933	1,501	Latvia	1934	375
Yugoslavia	1934	1,206	Finland	1934	358
United Kingdom ..	1934	1,135	Greece	1934	347
Columbia	1934	972	Siam	1934	345
Italy	1930	943	New Zealand ..	1934	274
Union of South Africa	1930	868	Netherlands ..	1934	269
Hungary	1934	803	Austria	1934	261
Czechoslovakia ..	1934	701	Belgium	1934	232
Dutch East Indies	1934	638	French Morocco	1933	218
Uruguay	1930	623	Estonia	1934	212
			Paraguay	1926	210

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 4,300. The total number of horses exported during the latter period amounted to 21,453, valued at £607,902, equal to an annual average of 4,291 for £121,580. The average export price was £28 6s. 8d.. The horses exported to India, where they are largely used for army remounts, numbered 3,763 or 88 per cent. of the average exports for the quinquennium.

(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 £263. The average number imported per annum was, however, only 231, and the average annual value, £60,729. The following table gives the imports, exports and net exports of horses during each of the years from 1930-31 to 1934-35 :—

HORSES.—IMPORTS AND EXPORTS, AUSTRALIA.

Year.	Imports.		Exports.		Net Exports.	
	No.	Value.	No.	Value.	No.	Value.
		£		£		£
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
1933-34 (a) ..	367	61,627	3,616	97,273	3,249	35,646
1934-35 (a) ..	388	150,703	4,511	135,072	4,123	-15,631

(a) Australian currency values.

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

§ 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 an 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 until the maximum number of 14,441,309 cattle was attained in 1921. The heavy decreases following that year are attributed principally to the low prices realized abroad for frozen beef and the loss of markets due to the consumers' preference for the chilled product. Additional contributing factors were the droughts of 1925-26 and 1928-29 in the cattle producing districts of Queensland. Subsequent to 1929 an increase of approximately 500,000 has been recorded annually, of which between one-third and one-half was due to expansion in the dairy herds.

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

CATTLE.—NUMBER.

31st Dec.	N.S.W. (b)	Vic. (b)	Q'land.	S. Aust.	W. Aust.	Tas.	Nor. Ter.	Fed. Cap. Ter. (b)	Total.
1930	2,840,473	1,429,920	5,463,724	218,985	812,844	230,254	720,476	44,240	11,720,916
1931	2,993,586	1,637,530	5,550,399	265,324	826,532	232,444	749,745	5,395	12,260,955
1932	3,141,174	1,900,922	5,535,065	312,932	857,473	230,807	780,121	4,043	12,783,137
1933	3,361,771	2,002,235	5,781,170	352,728	885,669	262,256	859,867	6,790	13,512,486
1934	3,482,831	2,085,080	6,032,641	346,479	911,940	261,588	899,679	8,433	14,048,671

(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 43.1 per cent. of the cattle in Australia in 1934.

The largest relative gain since 1929 occurred in South Australia, followed by Victoria and New South Wales; increases were also recorded in the remaining States. The proportion in each of the States and Territories during 1934 was:—New South Wales, 24.79; Victoria, 14.84; Queensland, 43.09; South Australia, 2.47; Western Australia, 6.49; Tasmania, 1.86, Northern Territory, 6.40; Federal Capital Territory, 0.06.

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.	Number of Cattle (‘000 omitted).	Country.	Year.	Number of Cattle (‘000 omitted).
India (British and Native) ..	1933	160,094	Tanganyika Territory	1934	4,853
U.S. of America ..	1934	68,529	Dutch East Indies..	1934	4,701
Brazil ..	1931	42,539	Cuba ..	1934	4,515
Soviet Union ..	1934	42,422	French Equatorial and West Africa	1934	4,338
Argentine Republic	1934	30,868	Czechoslovakia ..	1934	4,305
China ..	1933	21,638	New Zealand ..	1934	4,301
Germany..	1934	19,198	Rumania..	1932	4,189
France ..	1934	15,704	Irish Free State ..	1934	4,086
Australia ..	1934	14,049	Yugoslavia ..	1934	3,990
Union of South Africa	1930	10,751	Spain ..	1933	3,569
Mexico ..	1930	10,083	Rhodesia..	1934	3,211
Poland ..	1934	9,258	Denmark ..	1934	3,062
Canada ..	1934	8,952	Paraguay ..	1926	2,973
United Kingdom ..	1934	8,742	Sweden ..	1934	2,893
Columbia ..	1934	7,972	Netherlands ..	1934	2,830
Uruguay ..	1932	7,372	Nigeria ..	1934	2,688
Italy ..	1930	7,089	Chile ..	1930	2,388
Madagascar ..	1934	5,693	Austria ..	1934	2,349
Kenya ..	1933	5,225	Venezuela ..	1922	2,278
Siam ..	1934	5,222	Uganda ..	1934	2,223
Turkey ..	1934	5,207	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 follows:—

CATTLE.—IMPORTS AND EXPORTS, AUSTRALIA.

Year.	Imports.		Exports.		Net Exports.	
	No.	Value. (a)	No.	Value. (a)	No.	Value. (a)
		£		£		£
1930-31 ..	81	11,368	355	3,580	274	— 7,788
1931-32 ..	40	8,543	371	2,870	331	— 5,673
1932-33 ..	98	12,464	287	5,375	189	— 7,089
1933-34 ..	208	33,983	323	6,683	115	— 27,300
1934-35 ..	161	30,382	224	3,891	63	— 26,491

(a) Australian currency values.

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

The average value of the cattle imported during the last five years was £164 10s. 6d. per head, while the average value of the cattle exported during the same period was £14 7s. 2d. 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 1930 to 1934 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.
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	596,975	89,350	91,359	30,335	1,899	1,506	1,943,714
1933	769,776	471,895	719,277	104,488	99,217	34,558	4,363	1,616	2,205,190
1934	974,749	593,248	851,393	140,170	110,124	37,581	4,358	1,791	2,713,414

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

6. Production and Consumption of Beef.—The production of beef in Australia during the year 1934–35 was estimated at 1,027,162,000 lb. The requirements of the local market absorbed 810,528,000 lb., approximately 79 per cent., leaving a balance of 21 per cent., which was exported as frozen, chilled or canned beef. (See also § 1, 10 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 has grown considerably, the quantities and values exported during the past five years being as follows :—1930–31, 155,630,647 lb., £2,235,526; 1931–32, 165,872,145 lb., £2,087,829; 1932–33, 153,972,800 lb., £1,854,582; 1933–34, 173,076,092 lb., £2,020,050; and 1934–35, 212,099,109 lb., £2,559,605. Since 1932–33 chilled beef to the extent mentioned hereunder has been included in the foregoing. (See Table § 1, No. 8.) The largest purchaser of Australian beef is the United Kingdom, which during the year 1934–35 took £2,318,831 worth, or about 90.5 per cent., of the total shipments. Other countries importing Australian beef were in order of importance Egypt, Malta, Japan, Malaya (British), Philippine Islands and Belgium. These countries, together with the United Kingdom, accounted for 97.5 per cent. of the total value of export.

The distance of Australia from the chief markets of the world has hitherto 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 254,000 lb. were made during 1932–33 and 1,515,000 lb. in 1933–34. Exports in 1934–35, which amounted to 21,570,928 lb., valued at £322,239, and those of 1935–36 amounting to 23,193,737 lb., valued at £348,047, indicate that these shipments are now past the experimental stage and forecast the displacement of the frozen beef trade at no distant date. Shipping companies have effected structural alterations to their vessels to permit of the carriage of chilled beef.

8. Agreements Regarding Meat at the Ottawa Conference.—A stimulus to the Australian meat industry was provided by 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.

This matter is more specifically referred to in § 2 par. 6 of Chapter VII.—Trade. Details of imports of beef, mutton and lamb into the United Kingdom during the period 1931 to 1935 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 1931 to 1935 :—

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

Country of Origin.	1931.	1932.	1933.	1934.	1935.
CHILLED—QUANTITY.					
	cwt.	cwt.	cwt.	cwt.	cwt.
Brazil	598,664	481,151	517,022	509,103	508,534
Uruguay	778,437	503,855	560,392	560,007	561,560
Argentine Republic ..	7,911,175	7,804,366	6,951,833	6,942,113	6,937,209
Other Foreign Countries ..	..	..	..	..	..
British .. .. .	..	9,369	142,073	238,445	481,719
Total Chilled ..	9,288,276	8,798,741	8,171,320	8,250,658	8,489,022
CHILLED—VALUE.					
	£	£	£	£	£
Brazil	1,160,043	980,342	834,363	798,693	793,772
Uruguay	1,589,591	986,489	953,839	937,456	907,377
Argentine Republic ..	17,384,571	16,198,019	12,832,259	11,695,034	11,534,344
Other Foreign Countries ..	..	..	..	..	..
British .. .. .	..	13,807	214,804	380,422	733,787
Total Chilled ..	20,134,205	18,178,657	14,835,265	13,811,605	13,969,280
FROZEN—QUANTITY.					
	cwt.	cwt.	cwt.	cwt.	cwt.
United States of America ..	..	..	..	..	..
Brazil	83,477	24,544	5,333	5,473	11,245
Uruguay	169,200	98,806	27,815	40,950	42,051
Argentine Republic ..	197,895	149,800	113,910	97,234	94,732
Other Foreign Countries ..	486	1,090	..	..	..
Australia	992,462	814,362	947,142	1,322,855	1,105,217
New Zealand	220,317	362,003	431,007	697,146	465,170
Other British Countries ..	1,288	1,244	5,485	4,866	4,509
Total Frozen ..	1,665,125	1,451,849	1,530,692	2,168,524	1,722,924
Grand Total (Chilled and Frozen) ..	10,953,401	10,250,590	9,702,012	10,419,182	10,211,946

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

Country of Origin.	1931.	1932.	1933.	1934.	1935.
FROZEN—VALUE.					
	£	£	£	£	£
United States of America ..	..	..	..	..	..
Brazil	149,606	47,788	7,327	7,635	17,417
Uruguay	349,300	183,109	42,901	63,800	78,018
Argentine Republic ..	410,853	276,653	181,307	153,758	161,811
Other Foreign Countries ..	877	1,526	..	..	..
Australia	1,547,425	1,185,849	1,212,096	1,660,554	1,481,245
New Zealand	320,691	479,757	510,518	824,611	607,525
Other British Countries ..	2,503	2,282	7,671	5,578	6,134
Total Frozen ..	2,781,255	2,176,964	1,961,820	2,715,936	2,352,150
Grand Total (Chilled and Frozen) ..	22,915,460	20,355,621	16,797,085	16,527,541	16,321,430

§ 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 were, 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 113,048,037 in 1934, the greatest number ever recorded in Australia. At no previous period have such large numbers been depastured continuously, and the development has taken place notwithstanding an average annual slaughter of more than sixteen million sheep and lambs for the mutton and lamb trade.

The number of sheep in the several States and Territories for each year from 1931 to 1934 with an estimate at the 31st December, 1935, is as follows :—

SHEEP.—NUMBER.

31st Dec.	New South Wales. (a)	Victoria. (a)	Queensland.	South Australia.	Western Australia.	Tasmania.	Nor. Ter.	Fed. Cap. Ter. (a)	Total.
1931	52,986,000	16,376,217	22,324,278	6,608,981	10,098,104	2,012,055	18,867	194,391	110,618,893
1932	53,698,236	17,512,394	21,312,865	7,713,236	10,417,031	2,040,564	18,250	214,355	112,926,931
1933	52,104,000	17,195,969	20,072,804	7,941,060	10,322,350	2,035,052	18,076	231,742	109,921,053
1934	53,327,000	16,783,631	21,574,182	7,884,919	11,197,156	2,038,450	23,356	219,343	113,048,037
1935 ^b	56,000,000	17,457,291	17,806,188	7,700,000	10,391,000	2,000,000	20,000	220,000	111,594,479

(a) 31st March year following.

(b) Estimate as at 31st December, 1935.

3. Proportion in the Several States and Territories.—Apart from the effect of drought the relative number of sheep depastured in the different States remains fairly constant. Slight decreases were recorded in 1934 in Victoria and South Australia but these were more than offset by the increases recorded in the other States.

The percentage distribution in 1934 was :—New South Wales, 47.18 ; Victoria, 14.85 ; Queensland, 19.09 ; South Australia, 6.97 ; Western Australia, 9.90 ; Tasmania, 1.80 ; Federal Capital Territory, 0.19 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 113 millions, followed by the United States of America with 52 millions, the Soviet Union with 52 millions, and India (British and Native), 43 millions. On account of drought, the numbers of sheep in the Union of South Africa dropped from 46 million in 1933 to 35 million in 1934, increasing in 1935 to about 37 million. In Argentine Republic sheep flocks also declined from 44.4 million in 1930 to 38 million in 1935, and one of the reasons of this decrease was stated to be the increased employment of land for agricultural purposes. During the years 1925 to 1929 the sheep flocks of the Soviet Union exceeded those of Australia. The maximum number recorded in that country was 130,000,000 in 1928, but since that year a remarkable decline has taken place and the number depastured in 1934 was only 52,000,000, of which about 5 million are goats. In July, 1935, however, the number increased to 61.1 million, and is the first improvement noted since the year of maximum output, 1928. No explanation of the large decrease since 1928 is available, but it is known that heavy slaughterings occurred as a protest against the intensification of the Soviet collectivization plan. Russian sheep are almost entirely coarse-wooled 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 paragraph 5 following, however, the export of stud sheep is subject to control. Production of wool in the Soviet Union apparently amounted to about 167 million lb. only during the year 1934. This represents an average weight of fleece shorn of under 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 ..	1934	113,048	Bulgaria ..	1926	8,740
United States of America ..	1934	52,210	French Morocco ..	1934	8,086
Soviet Union (a) ..	1934	51,925	Greece ..	1934	7,910
India (British and Native) ..	1934	43,279	Chile ..	1930	6,263
Argentine Republic ..	1934	39,330	Algeria ..	1934	5,845
Union of South Africa ..	1934	35,011	Bolivia ..	1931	5,232
New Zealand ..	1934	28,649	Iraq ..	1934	4,005
United Kingdom ..	1934	24,944	Portugal ..	1925	3,721
Spain ..	1933	19,093	Mexico ..	1930	3,674
Uruguay ..	1932	15,406	Germany ..	1934	3,483
China ..	1934	14,926	Canada ..	1934	3,421
Iran ..	1933	14,582	Tunis ..	1934	3,375
Rumania ..	1932	12,294	Kenya ..	1930	3,200
Peru ..	1929	11,209	Irish Free State ..	1934	2,931
Turkey ..	1934	10,739	Poland ..	1934	2,554
Brazil ..	1931	10,702	Somaliland ..	1934	2,500
Italy ..	1930	10,268	Sudan (Anglo- Egyptian) ..	1934	2,250
France ..	1934	9,571	Manchuria ..	1934	2,208
French Equatorial and West Africa ..	1934	9,505	Nigeria ..	1934	1,958
Yugoslavia ..	1934	8,868	Tanganyika Territory ..	1934	1,934
			Basutoland ..	1934	1,409
			Syria and Lebanon ..	1934	1,421

(a) Including goats.

5. Oversea Imports and Exports of Sheep.—As in the case of cattle, the oversea exports of live sheep from Australia are of comparatively little 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 in previous 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 1934–35 exports for breeding purposes increased to 5,021 sheep valued at £18,508, of which 4,408 sheep valued at £13,111 were shipped to Japan and Korea. 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 1930–31 to 1934–35 :—

SHEEP.—IMPORTS AND EXPORTS, AUSTRALIA.

Year.	Imports.		Exports.		Net Exports.	
	No.	Value.	No.	Value.	No.	Value.
		£		£		£
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
1933-34 (a) ..	1,522	12,906	44,436	27,346	42,914	14,440
1934-35 (a) ..	1,377	15,233	59,559	45,351	58,182	30,118

(a) Australian currency values.

6. **Sheep Slaughtered.**—The number of sheep slaughtered in the several States during each of the years from 1930 to 1934 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.
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	1,564,786	1,279,143	1,044,493	424,519	790	25,444	19,013,209
1933..	7,186,612	7,773,289	1,299,285	1,495,127	1,092,222	366,156	900	25,367	19,232,958
1934..	6,829,477	7,646,070	1,275,936	1,591,054	1,079,516	349,044	..	22,207	18,793,304

(a) Year ended 30th June year following.

7. **Production and Consumption of Mutton and Lamb.**—The production of mutton and lamb during the year 1934-35 amounted to 716,784,000 lb., of which 519,079,000 lb., or 72 per cent., was consumed locally, leaving a balance of 28 per cent. for exportation. See also § 1, No. 10.

8. **Exports of Frozen Mutton and Lamb.**—The export trade of mutton and lamb preserved by cold process expanded rapidly until 1913 when 205 million lb. was dispatched. Progress was interrupted during the war years and exports declined thereafter to a very low figure. The high wool prices which prevailed during the post war years were no doubt a factor in causing this decline. In 1919-20 and in 1922-23 large shipments were made aggregating 247 million lb. and 168 million lb. respectively, but these were isolated cases. Prior to 1923-24 the shipments consisted mainly of frozen mutton, but from that year onwards lamb supplanted mutton and there has been an almost uninterrupted increase in the quantity of lamb shipped overseas each year.

The quantity and value of the shipments of mutton and lamb during each of the last five years were as follows:—Lamb, 1930-31, 68,300,314 lb., £1,563,290; 1931-32, 106,599,787 lb., £2,219,975; 1932-33, 121,802,858 lb., £2,165,175; 1933-34, 124,755,938 lb., £2,893,138; 1934-35, 135,879,651 lb., £3,515,230. Mutton, 1930-31, 40,952,881 lb., £542,673; 1931-32, 58,681,549 lb., £774,087; 1932-33, 44,994,653 lb., £532,049; 1933-34, 46,351,359 lb., £682,705; 1934-35, 60,314,351 lb., £960,479.

As with beef, the principal customer in this trade is the United Kingdom, which absorbed 98 per cent. of the total quantity exported from Australia during the year 1934-35.

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 1935 are given in the following table:—

IMPORTS OF FROZEN MUTTON AND LAMB INTO THE UNITED KINGDOM.

Country of Origin.	1931.	1932.	1933.	1934.	1935.
MUTTON—QUANTITIES.					
	cwt.	cwt.	cwt.	cwt.	cwt.
Chile	125,907	151,195	140,282	82,258	89,326
Brazil	1,799	462	1,782	..	..
Uruguay	53,605	31,649	33,324	13,690	6,232
Argentine Republic ..	485,350	354,233	217,174	137,748	150,423
Other Foreign Countries ..	124	286	..	2,895	2,870
Total, Foreign ..	666,785	537,825	392,562	236,591	248,851
Australia	502,211	190,952	347,409	461,259	424,054
New Zealand	1,105,105	1,335,884	998,547	898,965	1,041,187
Other British Countries ..	3	873	1,763	..	..
Total, British ..	1,607,319	1,527,709	1,347,719	1,360,224	1,465,241
Grand Total ..	2,274,104	2,065,534	1,740,281	1,596,815	1,714,092
MUTTON—VALUE.					
	£	£	£	£	£
Chile	203,360	216,577	214,655	163,574	129,856
Brazil	3,038	659	2,412	..	..
Uruguay	103,301	58,559	54,863	23,260	10,635
Argentine Republic ..	952,349	555,712	348,525	261,398	223,068
Other Foreign Countries ..	244	534	..	4,744	3,984
Total, Foreign ..	1,262,292	832,041	620,455	452,976	367,543
Australia	810,537	296,577	513,354	845,228	693,718
New Zealand	2,033,978	2,083,185	1,612,378	1,716,799	1,755,894
Other British Countries ..	8	1,621	2,888	..	..
Total, British ..	2,844,523	2,381,383	2,128,620	2,562,027	2,449,612
Grand Total ..	4,106,815	3,213,424	2,749,075	3,015,003	2,817,155

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

Country of Origin.	1931.	1932.	1933.	1934.	1935.
LAMB—QUANTITIES.					
	cwt.	cwt.	cwt.	cwt.	cwt.
Iceland	18,097	30,661	15,236	..	..
United States .. .. .	..	..	..	..	..
Chile	113,992	144,952	124,368	124,067	118,554
Brazil	10,362	4,841	9,929	..	..
Uruguay	230,695	131,220	138,637	124,702	130,175
Argentine Republic	1,067,959	1,017,417	929,420	783,868	754,835
Other Foreign Countries	280	266	..	27,641	28,561
Total, Foreign	1,441,385	1,329,357	1,217,590	1,060,278	1,032,125
Australia	1,027,134	961,140	956,948	1,165,848	1,361,178
New Zealand	2,364,656	2,570,958	2,736,546	2,655,611	2,591,746
Other British Countries .. .. .	..	85	1,404	242	18
Total, British	3,391,790	3,532,183	3,694,898	3,821,701	3,952,942
Grand Total	4,833,175	4,861,540	4,912,488	4,881,979	4,985,067
LAMB—VALUE.					
	£	£	£	£	£
Iceland	45,310	58,784	38,718	..	..
United States .. .. .	..	..	..	..	..
Chile	274,645	347,020	290,447	365,115	271,858
Brazil	24,319	4,046	20,421	..	..
Uruguay	603,981	315,141	314,292	311,953	327,255
Argentine Republic	2,806,270	2,357,467	2,151,109	2,051,554	1,898,714
Other Foreign Countries	687	945	..	67,008	77,642
Total, Foreign	3,755,212	3,083,403	2,814,987	2,795,630	2,575,469
Australia	2,785,113	2,199,041	2,395,193	3,320,964	3,937,905
New Zealand	7,600,524	7,154,472	7,435,731	8,414,183	8,066,213
Other British Countries .. .. .	..	290	3,615	674	51
Total, British	10,385,637	9,353,803	9,834,539	11,735,821	12,004,169
Grand Total	14,140,849	12,437,206	12,649,526	14,531,451	14,579,638

§ 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 1934-35 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	1934-35	113.0	1,015
United States	1934	52.2	450
Soviet Union	1934	51.9	140
Argentine Republic	1934-35	39.3	390
Union of South Africa	1934-35	35.0	222
New Zealand	1934-35	28.6	276

2. **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 exactly similar. 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 15 per cent. of the total wool exports regarded as "greasy".

3. **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.	1930-31.	1931-32.	1932-33.	1933-34.	1934-35.
	lb.	lb.	lb.	lb.	lb.
New South Wales (a)	428,752,210	503,275,416	533,710,404	486,152,493	496,876,887
Victoria	146,862,612	159,721,916	170,807,900	161,146,436	156,761,979
Queensland	182,061,407	184,716,462	185,833,546	169,989,516	174,088,413
South Australia	63,478,524	67,021,312	75,727,946	79,288,903	77,790,933
Western Australia	76,951,500	77,985,741	81,307,832	85,118,808	95,836,161
Tasmania	14,800,000	14,700,000	15,200,000	14,200,000	14,035,000
Northern Territory (b)	35,000	35,000	35,000	35,000	35,000
Total	912,941,253	1,007,455,847	1,062,622,628	995,931,156	1,015,424,373

(a) Including Federal Capital Territory.

(b) Approximate figures.

(ii) *Estimate for 1935-36.* Although the returns are not yet complete, the total wool production of Australia during 1935-36 is estimated at 1,000,000,000 lb., valued at approximately £58,375,000 or 14.01d. per lb. in Australian currency.

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 in some areas 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 gives details of the world's wool production and shows the importance of Australia as a wool-producing country. Out of a total production of 3,667 million lb. in 1934-35, Australia produced 1015.4 million lb., or 27.7 per cent. It is also interesting to note that the share of the British Empire in world production during the same year was estimated at 1,773 million lb., or 48.3 per cent.

WOOL.—WORLD'S PRODUCTION.

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

Countries.	Average Annual Pre-war Production. (a)	1930-31.	1931-32.	1932-33.	1933-34.	1934-35.
Australia	741.4	912.9	1,007.5	1,062.8	995.9	1,015.4
United States ..	314.1	434.6	464.4	440.5	459.8	449.7
Argentine Republic ..	358.7	354.0	378.0	388.0	385.0	390.0
Union of South Africa	165.9	299.0	314.0	330.0	284.0	222.0
Soviet Union (Russia)	380.0	306.0	212.0	142.0	138.0	140.0
New Zealand	198.5	271.1	282.8	288.4	300.5	276.0
Uruguay	157.0	166.0	104.0	112.0	95.0	117.0
China (b)	100.0	120.0	120.0	120.0	120.0	120.0
United Kingdom ..	134.0	111.0	113.0	119.0	120.0	114.0
India (b)	100.0	100.0	100.0	100.0	100.0	100.0
Spain	72.0	80.5	77.5	80.5	70.0	73.0
Rumania	13.2	43.5	42.8	43.3	(b) 45.0	(b) 45.0
Persia	12.1	45.0	49.0	(b) 49.0	(b) 49.0	(b) 49.0
France	80.7	57.6	56.0	54.3	53.8	53.6
Turkey	118.0	36.8	41.3	41.3	38.9	37.6
Italy	55.0	48.0	44.0	42.0	(b) 42.0	(b) 40.0
Algeria	35.2	49.3	28.1	39.3	39.0	41.0
Chile	17.4	26.7	29.6	32.5	33.9	(b) 40.0
Brazil	35.0	31.5	32.0	(b) 32.0	(b) 32.0	(b) 32.0
Germany	52.0	32.4	32.4	31.5	31.3	32.2
Yugoslavia	25.4	27.1	27.8	29.5	29.8	30.1
Canada	11.2	21.0	20.4	20.5	19.2	19.5
Morocco (French) ..	14.9	27.9	23.1	26.4	27.0	28.3
Bulgaria	23.7	19.6	19.8	20.7	20.9	21.3
Irish Free State ..	..	18.9	19.3	19.6	19.6	17.0
Basutoland .. ..	..	9.7	9.3	11.8	9.9	5.1
Falkland Islands ..	..	3.7	3.9	3.9	4.0	4.0
Other Countries ..	71.2	165.6	166.2	153.1	° 145.3	154.0
Total	3,286.6	3,819.4	3,818.2	3,833.4	3,708.8	3,666.8

(a) Average for years 1909 to 1913 inclusive.

(b) Estimated.

6. **Consumption of Locally Processed Wool.**—It is impossible to obtain full particulars of the whole consumption of wool in Australia, as considerable quantities of manufactures of wool are imported. It is possible, however, to secure with reasonable accuracy, particulars of the quantity of wool which is used in Australian factories and mills to produce woollen cloth and other woollen goods, such as hosiery and knitted ware. Some difficulties arise in the aggregation of the returns from individual mills which may be concerned only with one process in the manufacture of the completed article and whose output constitutes the raw material of other mills. It is believed, however, that the risk of duplication has now been reduced to a minimum and that the figures stated below can be accepted as substantially accurate.

For reasons mentioned in § 5, par. 2 above, the factors used for converting wool in terms of scoured, tops, yarn, etc., to a greasy basis must be regarded as approximate.

CONSUMPTION OF LOCALLY PROCESSED WOOL IN AUSTRALIA.

(In terms of greasy.)

Particulars.	1930-31.	1931-32.	1932-33.	1933-34.	1934-35.
	lb.	lb.	lb.	lb.	lb.
Wool used in Factories ..	38,482,976	56,640,414	73,687,412	71,753,128	66,371,388
Less Exports of Tops, etc.	3,860,364	6,989,644	8,969,090	11,376,674	10,988,590
Balance	34,622,612	49,650,770	64,718,322	60,376,454	55,382,798
Add Imports of Tops, etc.	578,384	508,934	625,070	505,040	370,680
Total	35,200,996	50,159,704	65,343,392	60,881,494	55,753,478

7. **Export of Wool.**—(i) *Greasy—Quantities.* Of the total weight of greasy wool shipped overseas during the last five years 31 per cent. was sent to the United Kingdom, as compared with 38 per cent. dispatched in pre-war years. The other leading consignees since 1931-32 were Japan, 25 per cent.; Belgium and France, 11 per cent. each; and Germany, 9 per cent. The balance of 13 per cent. was distributed among all other countries. 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.	1931-32.	1932-33.	1933-34.	1934-35.	1935-36.
	lb.	lb.	lb.	lb.	lb.	lb.
United Kingdom ..	212,004,088	256,845,443	244,011,182	209,887,487	202,725,815	244,568,575
France	149,835,946	116,355,296	122,536,429	65,017,851	75,760,166	64,692,287
Japan	7,262,683	185,672,264	196,847,697	170,444,959	196,125,519	234,481,213
Germany	106,344,696	80,565,488	111,763,527	113,529,765	27,220,923	27,116,447
Belgium	55,143,706	63,822,477	89,832,720	92,649,202	124,160,013	102,501,997
United States of America	15,486,447	9,362,688	5,500,120	5,359,242	5,448,868	24,810,766
Italy	4,381,197	56,740,272	63,099,517	58,349,566	17,694,730	4,502,392
Netherlands	(a)	461,462	2,255,552	3,270,646	16,450,416	15,296,931
India	425,547	673,314	1,210,144	882,120	937,589	1,373,061
Canada	126,653	102,134	112,292	264,826	209,358	740,968
Other Countries ..	5,830,377	4,626,184	12,758,245	15,969,007	29,042,202	31,565,778
Total	556,841,340	775,227,022	849,927,425	735,823,780	785,784,621	751,850,117

(a) Included in Other Countries.

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

WOOL, SCOURED AND WASHED.—EXPORTS, AUSTRALIA.

Country to which Exported.	Average Five Years 1909-13.	1931-32.	1932-33.	1933-34.	1934-35.	1935-36.
	(b) lb.	lb.	lb.	lb.	lb.	lb.
United Kingdom ..	32,032,577	32,713,240	33,277,812	31,765,177	34,462,119	31,860,364
France ..	16,068,910	5,371,571	9,828,929	5,863,131	9,813,830	10,835,868
Japan ..	1,888,161	2,478,529	4,147,808	1,788,995	549,812	1,261,865
Belgium ..	7,528,058	5,997,158	10,101,445	14,691,550	10,733,445	10,681,773
Germany ..	12,310,967	4,757,207	8,919,763	11,149,270	2,879,686	3,927,532
United States of America ..	66,156	356,088	229,622	162,550	93,770	460,818
Canada ..	(a)	420,906	1,326,254	1,736,820	1,229,816	2,145,371
Italy ..	265,442	2,664,242	2,547,945	2,552,684	728,040	129,176
Netherlands ..	(a)	268,112	231,687	542,420	907,970	682,641
India ..	59,684	366,299	726,392	454,655	633,950	750,926
Other Countries ..	127,155	385,984	1,940,393	2,325,641	4,432,019	5,488,190
Total ..	70,347,110	55,719,336	73,278,050	73,023,912	66,494,466	68,224,524

(a) Included with Other Countries.

(b) Including "tops."

(iii) *Tops, Noils and Waste—Quantities.* Although tops were recorded separately the exports of Noils and Waste were included under scoured and washed wool in the Customs returns until 1930-31. These three items have been combined in the following table:—

WOOL TOPS, NOILS AND WASTE.—EXPORTS, AUSTRALIA.

Country to which Exported.	1930-31.	1931-32.	1932-33.	1933-34.	1934-35.	1935-36.
	lb.	lb.	lb.	lb.	lb.	lb.
United Kingdom ..	581,352	1,309,028	2,022,055	2,480,627	2,251,031	1,810,423
Japan ..	392,863	533,355	565,655	1,074,136	477,608	556,166
Germany ..	..	125,882	104,844	73,506	..	..
Belgium ..	56,015	80,230	2,452	18,628	455	144,713
United States of America ..	44,747	14,454	1,939	..	43,106	187,561
Italy ..	8,409	..	22,891	85,911	345,451	84,355
Canada ..	779,585	1,200,909	1,507,084	1,746,531	2,040,586	2,081,330
Netherlands ..	..	..	..	28,845	5,128	..
India ..	6,168	182,973	199,593	79,217	116,948	99,023
Other Countries ..	45,815	42,396	54,089	95,342	209,086	709,160
Total ..	1,914,954	3,489,227	4,480,212	5,682,743	5,489,399	5,672,731

(iv) *Total Value of Exports.* The total value of the wool exported from Australia during the five years ending 1935-36 averaged 41 per cent. of the value of the total exports of merchandise of local origin, while during 1935-36 the proportion was approximately 40 per cent. The total value during the periods under review together with the principal countries to which wool was exported is shown in the next table:—

WOOL EXPORTS.—TOTAL VALUE, AUSTRALIA.

Country to which Exported.	Average Five Years 1909-13.	1931-32.	1932-33.	1933-34.	1934-35.	1935-36.
	£	£	£	£	£	£
United Kingdom ..	10,608,967	11,841,995	11,479,976	17,762,789	16,007,777	18,379,416
France ..	6,494,832	4,004,983	4,996,227	4,691,624	3,558,066	4,413,359
Japan ..	516,528	7,513,519	7,969,600	12,131,655	8,680,119	14,591,801
United States of America ..	795,328	542,728	337,215	494,294	352,466	2,102,066
Germany ..	5,131,282	3,223,083	4,561,321	8,698,744	1,511,094	2,052,436
Belgium ..	2,546,915	2,284,555	3,376,311	6,864,243	5,433,157	6,184,099
Italy ..	202,434	2,174,633	2,567,680	4,237,212	807,775	273,549
Netherlands ..	(a)	36,651	119,867	393,844	825,665	1,058,833
Canada ..	6,765	178,703	241,346	409,798	310,460	490,007
India ..	22,308	64,638	94,509	106,873	84,977	145,740
Other Countries ..	267,283	237,468	663,881	1,424,450	1,694,384	2,651,591
Total ..	26,592,642	32,102,896	36,407,933	57,125,526	39,265,940	52,342,897

(a) Included with Other Countries.

8. **Exports and Local Sales of Wool.**—Approximately 90 per cent. of Australian wool is now disposed of locally. 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.

9. **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 three succeeding years. In 1933-34, prices rose in a remarkable manner, averaging 15.84d. per lb., compared with 8.72d. per lb. for the previous year, an increase of 81.6 per cent. This increase, however, was not sustained during 1934-35 when the price receded to 9.75d. In 1935-36 prices again rose to satisfactory levels and averaged 14.01d. per lb. for the year. The effect of this fluctuation 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 1934-35 was valued at £40,446,000 compared with £63,000,000 in 1933-34, £38,600,000 in 1932-33, and £81,430,000 in 1924-25 when the record price was realized. On the average of the five seasons 1930-31 to 1934-35 the annual clip was valued at £42,400,000. As already mentioned in par. 3 (ii) above the value of the wool production for 1935-36 is estimated at £58,375,000.

The following table gives the average auction room price in Australia of greasy wool as compiled by the National Council of Wool-selling Brokers and by the Government Statistician of New South Wales. The price shown by the former represents the average price realized for all greasy wool of whatever type or quality marketed, whilst the latter represents the average price at Sydney auctions for greasy merino of standard grades.

WOOL.—AVERAGE MARKET PRICE PER LB.

Description.	1930-31.	1931-32.	1932-33.	1933-34.	1934-35.	1935-36.
	<i>d.</i>	<i>d.</i>	<i>d.</i>	<i>d.</i>	<i>d.</i>	<i>d.</i>
Greasy (a)	8.36	8.46	8.72	15.84	9.75	14.01
Greasy-Merino (b) ..	8.70	8.30	8.50	15.80	9.70	13.20

(a) National Council of Wool-selling Brokers.

(b) Government Statistician of New South Wales.

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.
	<i>d.</i>	<i>d.</i>	<i>d.</i>
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
1934-35	9.75	7.78	4.68
1935-36	14.01	11.19	6.79

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.

10. **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.

11. **United Kingdom Importation of Wool.**—The appended statement of the quantity and value of wool imported into the United Kingdom during the year 1934 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, 1934.

Country.	Quantity.	Value.	Country.	Quantity.	Value.
	lb.	£		lb.	£
Australia ..	255,536,900	14,381,599	Other British Possessions..	4,177,500	136,070
New Zealand ..	216,510,100	10,100,435	Peru ..	4,011,700	216,703
Union of South Africa ..	106,695,700	4,994,722	Belgium ..	1,970,100	142,076
Argentine Republic ..	86,173,200	2,611,050	Falkland Islands ..	2,688,500	80,555
India ..	37,756,400	1,031,440	Germany ..	1,287,500	59,403
Uruguay ..	16,499,700	965,769	United States of America ..	3,358,200	138,532
France ..	15,701,000	1,065,455	Other Countries	5,073,500	185,218
Chile ..	23,046,300	727,852			
Irish Free State	8,045,500	249,220	Total ..	788,531,800	37,086,099

(a) Greasy and Scoured.

Of the importations of wool into the United Kingdom, Australian wool represented 32 per cent. of quantity and 39 per cent. of value, and New Zealand 27 per cent. of quantity and 27 per cent. of value. Altogether, 631,410,600 lb., valued at £30,974,041, were received from British Possessions, these figures being equivalent to 80 per cent. of the total weight and 84 per cent. of the total value of all wool imported.

Preliminary figures show that during 1935, 864.2 million lb. of wool were imported into the United Kingdom; the chief sources of supply were Australia 358.2 million lb., New Zealand 171.6 million lb., Union of South Africa 118.8 million lb., and Argentine Republic 80.6 million lb., a total of 729.2 million lb. or 84 per cent.

12. **Principal Importing Countries and Sources of Supply.**—The following table furnishes in respect of the principal importing Countries details of their production and imports of wool, together with the chief sources of supply. The quantities imported refer to the actual weight of wool without distinguishing between greasy or scoured. They are also exclusive of any wool imported on skins.

WOOL.—PRINCIPAL IMPORTING COUNTRIES AND SOURCES OF SUPPLY.

(In millions of lb.)

Importing Country.	Production (a) of Importing Country.	Quantity imported from—					Total Imports.
		Australia.	Union of South Africa.	Argentine Republic.	New Zealand.	Other Countries.	
United Kingdom ..	114.0	235.5	106.7	86.2	216.5	123.6	788.5
Belgium ..	0.8	84.0	16.0	18.2	..	46.4	164.6
Czechoslovakia ..	1.7	9.8	3.6	5.3	3.1	11.8	33.6
France ..	53.6	143.2	61.4	63.7	23.6	45.4	337.3
Germany ..	32.2	99.1	45.3	45.4	43.9	82.4	316.1
Italy ..	40.0	59.2	19.4	29.8	..	38.8	147.2
Japan ..	..	134.1	5.2	7.9	..	14.3	182.5
Poland ..	10.6	12.2	3.7	5.6	4.0	7.9	33.4
Spain ..	73.0	1.8	1.1	1.5	..	1.4	5.8
Soviet Union ..	140.0	..	..	2.4	..	52.4	54.8
United States of America ..	449.7	7.6	0.6	24.9	3.6	71.7	108.4
Total ..	..	826.5	263.0	290.9	294.7	496.1	2,171.2

(a) As in the grease.

In connexion with the total imports shown in the above table, it should be noted that a considerable transit trade exists between continental countries. It must not be assumed, therefore, that the whole of the imports recorded by these countries are retained for their own consumption. The countries chiefly concerned with this transit trade are United Kingdom, Belgium, France and Germany. The quantities re-exported during 1934 were :—United Kingdom, 314.6 million lb., or 39.9 per cent. of the total imports ; Belgium, 99.7 million lb., or 60.6 per cent. ; France, 45.9 million lb., or 13.8 per cent. ; and Germany, 9.8 million lb., or 2.8 per cent.

13. *Inquiry into Wool Industry.*—(i) *General.* A Committee 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. 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. 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.
Expenses of production—	d.
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 1931-32 to 1935-36 amounted to £18,232,461, or an average of £3,646,492 per annum.

2. *Sheepskins with Wool.*—The exports of sheepskins with wool aggregating £9,693,769 during the five years constitute the largest item in the values referred to in the preceding paragraph. During the year 1935-36 France was the largest purchaser, taking 58 per cent. of the total consignments, while the United Kingdom ranked next with 21 per cent., followed by United States, with 12 per cent. The exports of sheepskins with wool during each of the years from 1930-31 to 1935-36 were as follows :—

SHEEPSKINS WITH WOOL.—EXPORTS, AUSTRALIA.

Particulars.	1930-31.	1931-32.	1932-33.	1933-34.	1934-35.	1935-36.
Number ..	12,016,672	9,146,335	10,448,928	11,478,513	10,765,364	11,811,480
Value .. £	1,949,048	1,106,195	1,382,583	2,627,389	1,772,595	2,805,083

3. *Sheepskins without Wool.*—Sheepskins without wool are exported chiefly to France and the United Kingdom. In 1935-36 the purchases of these two countries accounted for more than 74 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.	1930-31.	1931-32.	1932-33.	1933-34.	1934-35.	1935-36.
Number ..	280,128	131,276	146,564	177,814	247,050	255,636
Value .. £	13,612	3,643	3,914	13,384	11,768	19,370

4. *Hides.*—(i) *Exports.* The export trade in cattle hides, which fell away during the depression years, has again become important. The consignments in 1935-36 were distributed as follows :—United Kingdom, £221,644; Japan, £130,785; Finland, £49,550; Italy, £39,958; Germany, £34,799; Canada, £28,046; Other Countries, £108,935.

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

CATTLE HIDES.—EXPORTS, AUSTRALIA.

Particulars.	1930-31.	1931-32.	1932-33.	1933-34.	1934-35.	1935-36.
Number ..	752,366	293,890	450,857	482,339	690,578	807,604
Value .. £	610,720	212,539	292,841	369,927	417,071	613,717

Calfskins exported during the years 1931-32 to 1935-36 numbered 1,149,014 valued at £248,181 and were shipped mainly to the United States of America, the value of the skins taken by that country averaging 59 per cent. of the total exports during the year 1935-36. The annual export of horse hides is very small, and averaged only 6,409 hides valued at £3,062.

(ii) *Imports.* The imports of cattle hides and calfskins are fairly large, the average value during the last five years amounting to £266,768. 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 years 1930-31 to 1935-36 were as follows:—

CATTLE HIDES.—IMPORTS, AUSTRALIA.

Particulars.	1930-31.	1931-32.	1932-33.	1933-34.	1934-35.	1935-36.
Quantity cwt.	41,888	46,702	76,529	64,447	90,703	64,902
Value (a) £	169,165	157,057	250,569	288,125	336,872	301,217

(a) Australian currency values.

The number of horse hides imported into Australia is small. The value of imports during 1935-36 amounted to £264 in Australian currency.

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

OTHER SKINS.—EXPORTS, AUSTRALIA.

Description.	1930-31.	1931-32.	1932-33.	1933-34.	1934-35.	1935-36.
	£	£	£	£	£	£
Rabbit and Hare	570,240	488,736	460,182	953,901	876,221	1,744,834
Opossum ..	215,711	333,209	29,177	7,832	134,044	18,938
Kangaroo ..	127,932	96,997	74,389	175,597	159,571	229,469
Fox ..	47,787	56,435	105,356	168,034	50,232	61,943
Wallaby ..	25,012	7,848	6,826	30,325	12,051	12,803
Other ..	7,230	2,509	2,238	6,779	4,583	5,966
Total ..	993,912	985,734	678,168	1,342,468	1,236,702	2,073,953

The United States of America and the United Kingdom were the chief purchasers of these skins in 1935-36 as shown below:—

OTHER SKINS.—EXPORTS TO UNITED STATES AND UNITED KINGDOM, 1935-36.

Description.	United Kingdom.	United States of America.
	£	£
Rabbit and Hare	183,501	1,553,063
Opossum	11,634	7,069
Kangaroo	4,930	229,469
Fox	55,310	5,187
Wallaby	2,174	10,610
Other	982	836
Total	258,531	1,806,234