

## 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) 19
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 .. ..	o 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 1930, and from 1931 onwards in single years, are given in the following table, and are shown continuously in the graph on page 651.

During the seventy-five years covered by the table the live stock of Australia increased considerably, horses 308 per cent. ; cattle 251 per cent. ; sheep 441 per cent. ; and pigs 269 per cent. The average annual increases which these aggregates represent are as follows :—Horses, 1.90 per cent. ; cattle, 1.69 per cent. ; sheep, 2.28 per cent. ; and pigs, 1.75 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
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
1935	..	..	1,764,430	13,911,659	108,875,801	1,293,964

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, 1935, 1,293,964.

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-five 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	1932	..	0.27	1.95	17.23	0.18
1890	..	0.48	3.17	31.06	0.28	1933	..	0.26	2.03	16.52	0.16
1900	..	0.43	2.29	18.75	0.25	1934	..	0.27	2.11	16.97	0.17
1910	..	0.49	2.65	22.16	0.23	1935	..	0.26	2.06	16.13	0.19

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, 1935.

State or Territory.	Horses.	Cattle.	Sheep.	Pigs.
New South Wales .. .. .	1.75	10.95	167.85	1.41
Victoria .. .. .	4.05	23.80	198.64	3.58
Queensland .. .. .	0.66	9.00	20.94	0.45
South Australia .. .. .	0.52	0.88	20.91	0.25
Western Australia .. .. .	0.16	0.90	11.36	0.10
Tasmania .. .. .	1.16	10.30	81.03	1.72
Northern Territory .. .. .	0.07	1.72	0.05	0.00
Federal Capital Territory .. .. .	1.13	10.84	242.89	0.67
<b>Total</b> .. .. .	<b>0.59</b>	<b>4.68</b>	<b>36.60</b>	<b>0.43</b>

7. **Minor Classes of Live Stock.**—Excluding Victoria, where the details are not available, the numbers of minor classes of live stock returned for 1935 were as follows:—Goats, 143,870; camels, 4,179; mules and donkeys, 13,399; and ostriches, 32. 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 6,441 angora goats are included in the total of 143,870 goats shown above. Of these, 1,830 were in New South Wales, 1,179 in Queensland, 2,415 in South Australia, 663 in Western Australia, 353 in Tasmania and 1 in the Federal Capital Territory, while the quantity of mohair produced in Queensland in 1935 was set down at 192 lb., and the number of skins placed on the market was returned as 88.

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 1931–32 to 1935–36 were as follows:—

## NET EXPORTS OF PASTORAL PRODUCTS.—AUSTRALIA.

Product.	Unit of Quantity.	1931–32.	1932–33.	1933–34.	1934–35.	1935–36.
<b>QUANTITIES.</b>						
<b>Animals (living)—</b>						
Cattle .. .. .	No.	331	189	115	63	76
Horses .. .. .	"	4,771	3,227	3,249	4,123	3,783
Sheep .. .. .	"	47,131	51,821	42,914	58,182	64,340
Bones .. .. .	cwt.	9,416	8,299	8,737	10,207	17,188
Glue-pieces and Sinews .. .. .	"	186	495	225	1,251	379
Glycerine .. .. .	lb.	13,575	93,126	—288,222	—9,282	—1,193,982
Hair .. .. .	"	74,445	—121,363	—119,775	—559,673	—962,875
Hoofs .. .. .	cwt.	(a)	(a)	(a)	(a)	(a)
Horns .. .. .	"	(a)	(a)	(a)	(a)	(a)
<b>Meats—</b>						
Frozen Beef (b) .. .. .	lb.	165,871,501	153,972,403	173,076,002	212,099,109	196,818,221
" Mutton and Lamb .. .. .	"	165,281,142	166,797,195	171,106,849	196,192,828	178,005,079
" Rabbits and Hares .. .. .	pair	(a)	(a)	(a)	(a)	(a)
" Other .. .. .	lb.	8,061,876	9,579,958	12,214,574	15,012,149	15,098,299
Potted, and Extract of .. .. .	"	(a)	(a)	(a)	(a)	(a)
Preserved in Tins, etc. .. .. .	lb.	5,258,749	7,212,976	4,620,270	5,941,584	6,418,202
Other (excluding Bacon and Ham) .. .. .	"	277,562	330,186	466,613	408,396	561,341
Sausage Casings .. .. .	cwt.	11,562	10,429	19,361	14,543	8,938
<b>Skins—</b>						
Hides .. .. .	No.	(a)	(a)	(a)	(a)	(a)
Sheep .. .. .	"	(a)	(a)	(a)	(a)	(a)
Rabbit and Hare .. .. .	cwt.	69,774	77,873	99,339	84,744	91,413
Other (including Undressed Furs) .. .. .	"	(a)	(a)	(a)	(a)	(a)
Tallow .. .. .	cwt.	768,511	745,422	471,591	822,751	445,358
<b>Wool—</b>						
Greasy .. .. .	lb.	772,804,985	848,468,549	728,676,211	782,278,901	742,738,515
Scoured .. .. .	"	55,708,642	73,248,756	72,670,544	66,408,783	68,053,803
Tops .. .. .	"	2,170,330	2,525,380	2,923,974	3,104,232	3,144,411
Noils .. .. .	"	952,413	1,208,204	1,911,741	1,303,616	1,647,629
Waste .. .. .	"	366,484	738,201	837,184	1,067,598	880,045

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 £268,592,671 for the period, or an average of £53,718,534 per annum, of which wool represents 80.47 per cent. Meat, skins and tallow rank next in order of importance.

## NET EXPORTS OF PASTORAL PRODUCTS.—AUSTRALIA.

Product.	1931-32.	1932-33.	1933-34.	1934-35.	1935-36.
VALUES. (a)					
	£	£	£	£	£
Animals (living)—					
Cattle .. .. .	—5,673	—7,089	—27,300	—26,491	—30,244
Horses .. .. .	100,935	78,054	35,646	—15,631	3,473
Sheep .. .. .	8,496	12,654	14,440	30,118	36,062
Bones .. .. .	6,725	5,199	6,058	7,406	9,911
Glue-pieces and Sinews .. .. .	1,610	2,489	1,128	2,908	4,812
Glycerine .. .. .	4,601	7,421	1,172	4,062	—3,437
Hair .. .. .	—24,966	—53,063	—58,098	—81,902	—115,077
Hoofs .. .. .	4,750	4,330	5,755	6,092	5,035
Horns .. .. .	14,815	12,771	14,301	18,083	16,721
Meats—					
Frozen Beef .. .. .	2,087,812	(b)1,854,569	(b)2,020,049	(b)2,559,605	(b)2,181,803
" Mutton and Lamb .. .. .	2,994,056	2,697,213	3,575,827	4,475,665	4,465,691
" Rabbits and Hares .. .. .	478,946	559,367	425,665	443,484	243,023
" Other .. .. .	151,793	170,462	216,428	266,167	286,115
Potted, and Extract of .. .. .	5,174	—7,584	—29,452	—29,507	—32,025
Preserved in Tins, etc. .. .. .	135,805	183,539	130,996	152,880	191,316
Other (excluding Bacon and Ham)	6,098	7,710	10,881	7,649	9,885
Sausage Casings .. .. .	56,701	44,002	184,373	106,210	9,206
Skins—					
Hides .. .. .	62,762	52,995	119,344	147,782	450,577
Sheep .. .. .	1,097,816	1,368,886	2,624,990	1,753,908	2,808,267
Rabbit and Hare .. .. .	477,476	450,862	949,819	867,068	1,732,715
Other (including Undressed Furs) ..	304,696	—43,379	99,772	—32,942	—110,180
Tallow .. .. .	827,454	788,395	476,309	922,595	653,353
Wool—					
Greasy .. .. .	28,883,940	32,063,303	49,463,224	34,095,191	45,806,287
Scoured .. .. .	2,817,703	3,952,313	6,646,248	4,598,459	5,548,336
Tops .. .. .	248,055	271,993	434,472	331,833	404,644
Noils .. .. .	44,520	53,902	121,445	75,950	123,481
Waste .. .. .	7,940	20,030	32,220	39,935	48,848
<b>Total Values</b> .. .. .	<b>40,800,130</b>	<b>44,551,444</b>	<b>67,495,712</b>	<b>50,727,387</b>	<b>65,017,998</b>

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

(a) Australian currency values.

(b) Including chilled beef.

9. Value of Pastoral Production.—Particulars of the gross, local and net value of pastoral production for each State are shown in the following table for the year 1935-36 together with the totals for the two preceding years. Fuller details of the source of the information and an explanation of the terms used in this compilation will be found in Chapter XXVIII.—Miscellaneous. It should be noted, however, that maintenance costs have not been computed in all States and depreciation has not been deducted; consequently the net value of production is inflated to the extent of these costs.

## GROSS, LOCAL AND NET VALUE OF PASTORAL PRODUCTION, 1935-36.

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 ..	37,113,000	3,472,000	33,641,000	603,000	239,000	32,799,000
Victoria ..	19,484,164	1,439,829	18,044,335	280,000	341,935	17,422,400
Queensland ..	13,287,000	1,226,000	12,061,000	300,000	200,000	11,561,000
South Australia ..	5,442,737	651,414	4,791,323	88,171	100,496	4,602,656
Western Australia ..	6,199,581	591,850	5,607,731	180,462	77,953	5,350,216
Tasmania ..	1,697,620	125,890	1,571,730	54,000	25,270	1,492,460
Total 1935-36	83,224,102	7,506,983	75,717,119	1,505,633	983,754	73,227,732
1934-35	64,647,128	6,986,693	57,660,435	1,314,516	587,420	55,758,499
1933-34	84,302,489	7,684,309	76,618,180	1,265,686	545,903	74,806,591

(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 1935-36 and amounted in the aggregate to £475,600.

10. **Consumption of Meats.**—Particulars of the per capita consumption of meat in Australia are shown in the following table, together with details 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.

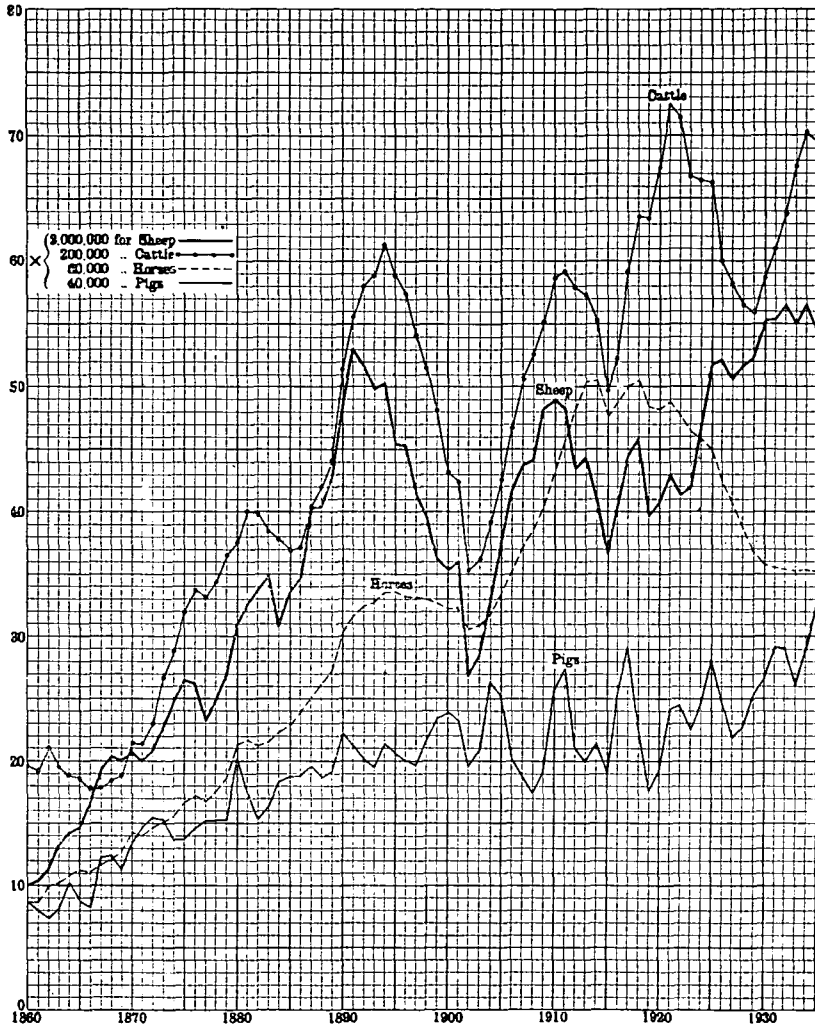
The average consumption in Australia is somewhat below that of New Zealand, but it is greatly in excess of that of Canada, Great Britain and the United States in which countries the average annual consumption approximates 135 lb. per head of population. Compared with Australia the consumption of beef, 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 world's supply of beef, mutton and lamb is obtained chiefly from countries situated in the Southern Hemisphere of which Argentine Republic, Australia, New Zealand and Uruguay are the main contributors. Argentine Republic furnishes the largest export of beef and New Zealand that of mutton and lamb, while Australia occupies second place in both commodities. Supplies of pork and pork products are largely drawn from countries in the Northern Hemisphere. It is to be expected, therefore, that the per capita consumption of beef, mutton and lamb will be greatest in the Southern producing countries, and pig meat in the northern.

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

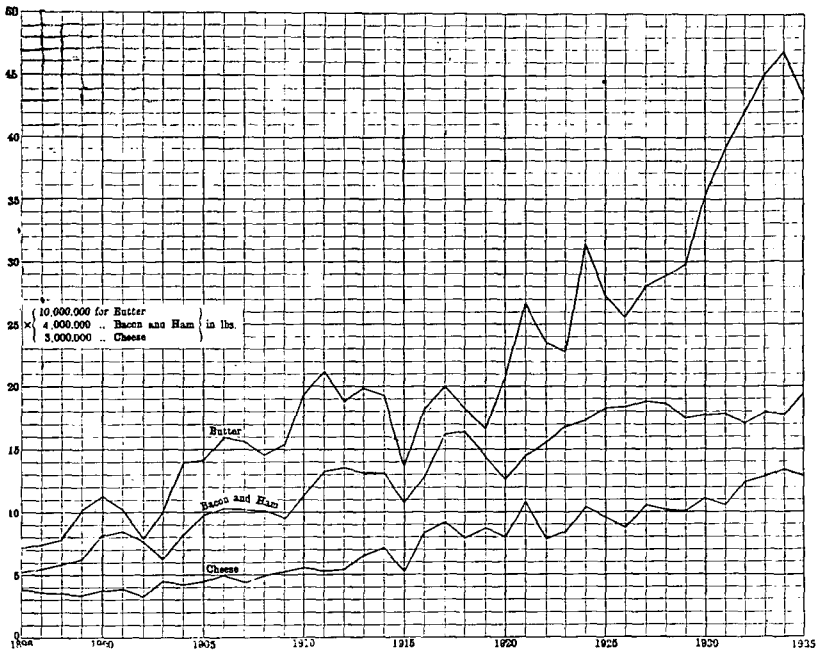
Description.	Australia, 1935-36.	New Zealand.	Great Britain, 1931.	Canada, 1930.	United States of America, 1934.
	lb.	lb.	lb.	lb.	lb.
Beef and Veal .. ..	132.79	125.00	65.00	60.34	63.00
Mutton and Lamb ..	73.35	105.00	30.00	5.93	7.00
Pork and Bacon and Ham ..	20.20	17.00	43.00	67.83	68.00
Total All Meats ..	226.34	247.00	138.00	134.10	138.00

## NUMBER OF HORSES, CATTLE, SHEEP AND PIGS—AUSTRALIA, 1860 TO 1935.



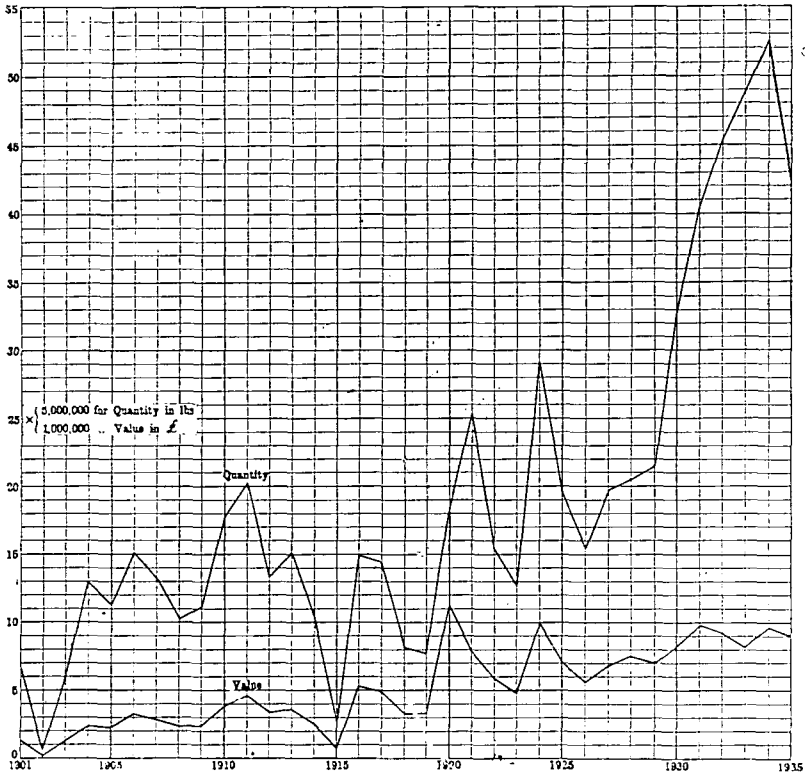
EXPLANATION.—The base of each small square represents an interval of one year, and the vertical side 2,000,000 in the case of sheep, 200,000 for cattle, 50,000 for horses, and 40,000 for pigs.

PRODUCTION OF BUTTER, CHEESE, AND BACON AND HAM—AUSTRALIA, 1896 TO 1935-36.



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 1935-36.



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.



## § 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 and Territory during each of the last five years:—

## HORSES.—NUMBER.

31st Dec.	N.S.W. (a)	Vic. (a)	Q'land.	S. Aust.	W. Aust.	Tas.	N.T.	F.C.T. (a)	Total.
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
1935	542,862	356,106	441,075	197,368	160,181	30,626	35,152	1,060	1,764,430

(a) 31st March year following.

The number of horses attained its maximum in Australia during 1918, when a total of 2,527,149 was recorded; in the same year the United States of America made its highest recording, and Canada reported likewise in 1921. The number in Australia has declined considerably since 1918 as the result of the development in motor transportation and the increasing use of petrol-driven cultivating and other machinery on farms.

During the past five years, however, the returns have been practically stationary probably due to the halt in the use of power-driven machinery on farms owing to depressed prices.

The number of horses in Australia from 1860 onwards may be ascertained from the graph on page 651.

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 1935 were:—New South Wales, 30.77; Victoria, 20.18; Queensland, 25.00; South Australia, 11.18; Western Australia, 9.08; Tasmania, 1.74; 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 the Federal Capital Territory 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 1935 the relative numbers were :— New South Wales, 0.20; Victoria, 0.19; Queensland, 0.45; South Australia, 0.34; Western Australia, 0.36; Tasmania, 0.13; Northern Territory, 6.81; Federal Capital Territory, 0.11; and Australia, 0.26.

5. *Comparison with other Countries.*—The numbers of horses in the leading horse-breeding countries of the world are as follows :—

#### HORSES.—NUMBERS IN PRINCIPAL COUNTRIES.

Country.	Year.	Number of Horses (,000 omitted).	Country.	Year.	Number of Horses (,000 omitted).
Soviet Union ..	1936	16,600	Uruguay ..	1930	623
U.S. of America ..	1936	11,527	Sweden ..	1935	611
Argentine Republic ..	1930	9,858	Turkey ..	1935	601
Brazil ..	1935	6,132	Cuba ..	1934	569
China ..	1935	4,080	Spain ..	1933	568
Poland ..	1936	3,822	Lithuania ..	1936	558
Germany ..	1936	3,407	Denmark ..	1936	536
Canada ..	1936	2,919	Bulgaria ..	1926	482
France ..	1936	2,774	Chile ..	1930	441
India (British and Native) ..	1935	2,394	Peru ..	1929	432
Rumania ..	1935	2,167	Irish Free State ..	1936	424
Mexico ..	1930	1,888	Haiti ..	1935	400
Manchuria ..	1935	1,838	Bolivia ..	1931	390
Australia ..	1935	1,764	Latvia ..	1936	389
Japan ..	1934	1,464	Finland ..	1935	361
Yugoslavia ..	1935	1,201	Greece ..	1935	361
United Kingdom ..	1935	1,120	Siam ..	1936	360
Colombia ..	1934	972	Netherlands ..	1936	295
Union of South Africa ..	1930	868	New Zealand ..	1936	276
Italy ..	1936	816	Austria ..	1934	261
Hungary ..	1935	807	Belgium ..	1935	231
Czechoslovakia ..	1935	695	French Morocco ..	1936	216
Dutch East Indies ..	1935	642	Estonia ..	1936	216
			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 4,100. The total number of horses exported during the latter period amounted to 20,561, valued at £598,672, equal to an annual average of 4,112 for £119,734. The average export price was £29 2s. 4d. The horses exported to India, where they are largely used for army remounts, numbered 3,584 or 87 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 £281. The average number imported per annum was, however, only 282, and the average annual value, £79,239. The following table gives the imports, exports and net exports of horses during each of the years from 1931-32 to 1935-36:—

## HORSES.—IMPORTS AND EXPORTS, AUSTRALIA.

Year.	Imports.		Exports.		Net Exports.	
	No.	Value.	No.	Value.	No.	Value.
		£		£		£
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
1935-36 (a) ..	352	132,645	4,135	136,118	3,783	3,473

(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 on page 651 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. After that year the number again fluctuated dropping almost continuously to 1929 with the decline in the oversea demand for frozen beef and occasional droughts particularly in Queensland, and recovering again during the next five seasons with the expansion of dairying a contributing factor.

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

## CATTLE.—NUMBER.

31st Dec.	N.S.W. (a)	Vic. (a)	Q'land.	S. Aust.	W. Aust.	Tas.	Nor. Ter.	Fed. Cap. Ter. (a)	Total.
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	250,807	780,121	4,643	12,783,137
1933	3,361,771	2,002,235	5,781,170	352,728	885,669	262,256	859,867	6,790	13,512,186
1934	3,482,831	2,085,080	6,052,641	346,479	911,940	261,588	899,679	8,433	14,048,071
1935	3,388,538	2,091,216	6,033,004	335,354	882,761	270,935	900,535	10,186	13,911,659

(a) 31st March, year following.

Although the proportion is not as high as it has been in the past, Queensland was carrying 43.4 per cent. of the cattle in Australia in 1935.

The largest relative gain since 1930 occurred in the Federal Capital Territory followed by Victoria, South Australia and the Northern Territory; increases were also recorded in the remaining States. The proportion in each of the States and Territories during 1935 was:—New South Wales, 24.36; Victoria, 15.03; Queensland, 43.37; South Australia, 2.41; Western Australia, 6.35; Tasmania, 1.94; Northern Territory, 6.47; Federal Capital Territory, 0.07.

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.—NUMBERS IN VARIOUS COUNTRIES.

Country.	Year.	Number of Cattle (,000 omitted).	Country.	Year.	Number of Cattle (,000 omitted).
India (British and Native)	1935	164,547	Dutch East Indies..	1935	4,516
U.S. of America ..	1936	66,676	Cuba ..	1934	4,515
Soviet Union ..	1936	56,500	French Equatorial and West Africa	1935	4,491
Brazil ..	1935	40,864	Rumania..	1935	4,327
Argentine Republic	1934	30,868	Czechoslovakia ..	1935	4,283
China ..	1935	22,647	New Zealand ..	1936	4,254
Germany..	1936	20,065	Irish Free State ..	1936	4,014
France ..	1936	15,762	Yugoslavia ..	1935	3,982
Australia..	1936	13,500	Spain ..	1933	3,570
Union of South Africa	1935	10,575	Denmark ..	1936	3,116
Poland ..	1936	10,194	Rhodesia..	1935	3,066
Mexico ..	1930	10,083	Paraguay ..	1926	2,973
Canada ..	1936	8,820	Sweden ..	1935	2,919
United Kingdom ..	1936	8,617	Sudan (Anglo-Egyptain)	1936	2,700
Colombia ..	1935	8,337	Nigeria ..	1934	2,688
Uruguay ..	1932	7,372	Netherlands ..	1936	2,570
Italy ..	1936	7,235	Chile ..	1930	2,388
Madagascar ..	1935	5,559	Austria ..	1934	2,349
Siam ..	1936	5,412	Venezuela ..	1922	2,278
Turkey ..	1935	5,370	Uganda ..	1935	2,187
Kenya ..	1933	5,225	Bolivia ..	1931	2,064
Tanganyika Territory	1935	4,793			

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)
		£		£		£
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
1935-36 ..	164	33,527	240	3,283	76	— 30,244

(a) Australian currency values.

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

The average value of the cattle imported during the last five years was £177 3s. 11d. per head, while the average value of the cattle exported during the same period was £15 3s. 0d. 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 1931 to 1935 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.
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
1935	1,100,472	774,395	866,410	153,686	120,123	39,588	1,531	1,620	3,057,825

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

6. **Production and Consumption of Beef.**—The production of beef in Australia during the year 1935-36 was estimated at 1,098,139,000 lb. The requirements of the local market absorbed 896,449,000 lb., approximately 82 per cent., leaving a balance of 201,690,000 lb., or 18 per cent., which was exported as frozen, chilled or canned beef. (See also § 1 par. 10 ante.)

7. **Exports 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:—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; 1934-35, 212,099,109 lb., £2,559,605; and 1935-36, 196,823,248 lb., £2,481,896. Since 1932-33 chilled beef to the extent mentioned hereunder has been included in the foregoing. (See Table in § 1 par. 8.) The largest purchaser of Australian beef is the United Kingdom, which during the year 1935-36 took £2,117,429 worth, or about 85.3 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 96.4 per cent. of the total value of export.

Owing to the distance of Australia from the chief markets of the world meat could be exported only in a frozen condition. In view of the preference for chilled beef, this circumstance 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. The success of these shipments indicated the practicability of Australia entering the chilled beef trade and exports increased during subsequent years in the following manner:—1934-35, 21,570,928 lb., £322,239; 1935-36, 23,193,737 lb., £348,047; and 1936-37, 41,959,695 lb., £608,172.

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 XVI.—Trade. Details of imports of beef, mutton and lamb into the United Kingdom during the period 1932 to 1936 will be found in the following table:—

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 1932 to 1936:—

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

Country of Origin.	1932.	1933.	1934.	1935.	1936.
<b>CHILLED—QUANTITY.</b>					
	cwt.	cwt.	cwt.	cwt.	cwt.
Brazil .. .. .	481,151	517,022	509,103	508,512	508,653
Uruguay .. .. .	503,855	560,392	560,997	501,560	544,921
Argentine Republic .. .. .	7,804,366	6,951,833	6,942,113	6,937,141	7,109,114
Other Foreign Countries .. .. .	..	..	..	..	..
British .. .. .	9,369	142,073	238,445	478,336	617,303
<b>Total Chilled</b> ..	<b>8,798,741</b>	<b>8,171,320</b>	<b>8,250,658</b>	<b>8,485,549</b>	<b>8,779,991</b>
<b>CHILLED—VALUE.</b>					
	£	£	£	£	£
Brazil .. .. .	980,342	834,363	798,693	793,741	809,936
Uruguay .. .. .	986,489	953,839	937,456	907,452	838,449
Argentine Republic .. .. .	16,198,019	12,832,259	11,095,034	11,529,888	12,010,908
Other Foreign Countries .. .. .	..	..	..	..	..
British .. .. .	13,807	214,804	380,422	728,673	900,966
<b>Total Chilled</b> ..	<b>18,178,657</b>	<b>14,835,265</b>	<b>13,811,605</b>	<b>13,959,754</b>	<b>14,560,259</b>
<b>FROZEN—QUANTITY.</b>					
	cwt.	cwt.	cwt.	cwt.	cwt.
United States of America .. .. .	..	..	..	..	..
Brazil .. .. .	24,544	5,333	5,473	11,245	3,421
Uruguay .. .. .	98,806	27,815	40,950	41,971	35,921
Argentine Republic .. .. .	149,800	113,910	97,234	93,933	113,666
Other Foreign Countries .. .. .	1,090	..	..	..	..
Australia .. .. .	814,362	947,142	1,322,855	1,104,511	1,055,786
New Zealand .. .. .	362,003	431,007	697,146	464,758	277,900
Other British Countries .. .. .	1,244	5,485	4,866	4,509	4,248
<b>Total Frozen</b> ..	<b>1,451,849</b>	<b>1,530,692</b>	<b>2,168,524</b>	<b>1,720,927</b>	<b>1,490,942</b>
<b>Grand Total (Chilled and Frozen)</b> ..	<b>10,250,590</b>	<b>9,702,012</b>	<b>10,419,182</b>	<b>10,206,476</b>	<b>10,270,933</b>

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

Country of Origin.	1932.	1933.	1934.	1935.	1936.
<b>FROZEN—VALUE.</b>					
	£	£	£	£	£
United States of America ..	..	..	..	..	..
Brazil .. .. .	47,788	7,327	7,635	17,417	5,230
Uruguay .. .. .	183,109	42,901	63,800	78,018	62,127
Argentine Republic ..	276,653	181,307	153,758	159,524	172,843
Other Foreign Countries ..	1,526	..	..	..	..
Australia .. .. .	1,185,849	1,212,096	1,660,554	1,481,103	1,317,389
New Zealand .. .. .	479,757	510,518	824,611	606,849	344,007
Other British Countries ..	2,282	7,671	5,578	6,134	6,143
<b>Total Frozen ..</b>	<b>2,176,964</b>	<b>1,961,820</b>	<b>2,715,936</b>	<b>2,349,045</b>	<b>1,907,739</b>
<b>Grand Total (Chilled and Frozen) ..</b>	<b>20,355,621</b>	<b>16,797,085</b>	<b>16,527,541</b>	<b>16,308,799</b>	<b>16,467,998</b>

#### § 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 on page 651. 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 about eighteen million sheep and lambs for the mutton and lamb trade.

The numbers of sheep in the several States and Territories for each year from 1932 to 1935 with an estimate at the 31st December, 1936, are 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.
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	51,936,000	17,457,291	18,060,093	7,945,745	11,082,972	2,139,900	25,483	228,317	108,875,801
1936b	55,300,000	17,663,103	20,125,000	7,905,112	8,955,000	2,000,000	25,000	244,000	112,217,215

(a) 31st March year following.

(b) Estimate as at 31st December, 1936.

3. **Proportion in the Several States and Territories.**—Apart from the effect of drought the relative numbers of sheep depastured in the different States remain fairly constant. Decreases were recorded in several of the States during 1935, but the losses in Queensland owing to drought were mainly responsible for the decline in the number of sheep in Australia during the year.

The percentage distribution in 1935 was :—New South Wales, 47.70; Victoria, 16.03; Queensland, 16.59; South Australia, 7.30; Western Australia, 10.18; Tasmania, 1.97; Northern Territory, 0.02; Federal Capital Territory, 0.21 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 109 million, followed by the Soviet Union with 73 million, the United States of America with 53 million and India (British and Native), 43 million. On account of drought, the number of sheep in the Union of South Africa dropped from 46 million in 1933 to 36 million in 1935. In Argentine Republic sheep flocks also declined from 44.4 million in 1930 to 38 million in 1935, and one of the reasons 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 was 130,000,000 in 1928, but after that year a remarkable decline took place and the number depastured in 1934 was only 46,848,000. In 1936 the number was stated to be 73,300,000, inclusive of about 5,000,000 goats. It was proposed under the second Five Year Plan to increase the number to 85 million by 1937. 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 by cross-breeding with merinos. 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 par. 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 1935. This represents an average weight of fleece shorn of under 3 lb., which is considerably less than half of that obtained in Australia:—

## SHEEP.—NUMBERS IN VARIOUS COUNTRIES.

Country.	Year.	No. of Sheep (,000 omitted).	Country.	Year.	No. of Sheep (,000 omitted).
Australia ..	1936	112,217	French Morocco ..	1936	9,265
Soviet Union (a) ..	1936	73,300	Bulgaria ..	1926	8,740
United States of America ..	1936	52,576	Greece ..	1935	8,185
India (British and Native) ..	1935	42,612	Algeria ..	1935	6,416
Argentine Republic ..	1935	38,000	Chile ..	1930	6,264
Union of South Africa ..	1935	35,996	Bolivia ..	1931	5,232
New Zealand ..	1936	30,114	Iraq ..	1936	4,783
United Kingdom ..	1936	25,023	Tanganyika Territory (a) ..	1936	4,478
China ..	1935	20,957	Germany ..	1936	4,331
Spain ..	1933	19,093	Mexico ..	1930	3,674
Iran ..	1934	16,019	Canada ..	1936	3,370
Uruguay ..	1932	15,406	Portugal ..	1934	3,274
Brazil ..	1935	13,049	Kenya ..	1930	3,236
Turkey ..	1935	12,436	Tunis ..	1935	3,210
Rumania ..	1935	11,838	Irish Free State ..	1936	3,062
Peru ..	1929	11,209	Manchuria ..	1935	3,060
France ..	1936	9,788	Poland ..	1936	3,024
Yugoslavia ..	1935	9,211	Somaliland ..	1935	2,500
Italy ..	1936	8,863	Sudan (Anglo-Egyptian) ..	1936	2,250
French Equatorial and West Africa ..	1935	8,392	Syria and Lebanon ..	1935	2,057
			Nigeria ..	1932	2,000

(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 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 1935-36 exports for breeding purposes amounted to 9,210 sheep valued at £27,066, of which 8,596 sheep valued at £22,373 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 1931-32 to 1935-36 :—

**SHEEP.—IMPORTS AND EXPORTS, AUSTRALIA.**

Year.	Imports.		Exports.		Net Exports.	
	No.	Value.	No.	Value.	No.	Value.
		£		£		£
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
1935-36 (a) ..	2,167	18,917	66,507	54,979	64,340	36,062

(a) Australian currency values.

6. **Sheep Slaughtered.**—The numbers of sheep slaughtered in the several States during each of the years from 1931 to 1935 were 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.
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	1,561,786	1,279,143	1,044,493	424,519	790	25,444	19,013,200
1933..	7,180,612	7,773,289	1,299,285	1,495,127	1,092,222	366,156	900	25,367	19,232,958
1934..	6,820,477	7,646,070	1,275,936	1,591,054	1,079,516	349,044	..	22,207	18,793,304
1935..	6,054,749	7,691,188	972,458	1,642,550	1,160,663	351,684	..	21,948	17,895,540

(a) Year ended 30th June year following.

7. **Production and Consumption of Mutton and Lamb.**—The production of mutton and lamb during the year 1935-36 amounted to 674,837,000 lb., of which 495,207,000 lb., or 73 per cent., was consumed locally, leaving a balance of 179,630,000 lb. or 27 per cent. for exportation. (See also § 1 par. 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. were 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, 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; 1935-36, 151,377,838 lb., £4,020,163. Mutton, 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; 1935-36, 26,629,544 lb., £445,589.

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 1935-36.

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 par. 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 1936 are given in the following table:—

**IMPORTS OF FROZEN MUTTON AND LAMB INTO THE UNITED KINGDOM.**

Country of Origin.	1932.	1933.	1934.	1935.	1936.
<b>MUTTON—QUANTITIES. .</b>					
	cwt.	cwt.	cwt.	cwt.	cwt.
Chile .. .. .	151,195	140,282	82,258	89,326	95,759
Brazil .. .. .	462	1,782	..	..	..
Uruguay .. .. .	31,649	33,324	13,690	6,232	8,240
Argentine Republic .. .. .	354,233	217,174	137,748	150,423	121,907
Other Foreign Countries .. .. .	286	..	2,895	2,870	2,063
<b>Total, Foreign .. .. .</b>	<b>537,825</b>	<b>392,562</b>	<b>236,591</b>	<b>248,851</b>	<b>227,969</b>
Australia .. .. .	190,952	347,409	461,259	424,050	227,218
New Zealand .. .. .	1,335,884	998,547	898,965	1,041,563	888,864
Other British Countries .. .. .	873	1,763	..	..	350
<b>Total, British .. .. .</b>	<b>1,527,709</b>	<b>1,347,719</b>	<b>1,360,224</b>	<b>1,465,613</b>	<b>1,116,432</b>
<b>Grand Total .. .. .</b>	<b>2,065,534</b>	<b>1,740,281</b>	<b>1,596,815</b>	<b>1,714,464</b>	<b>1,344,401</b>
<b>MUTTON—VALUE.</b>					
	£	£	£	£	£
Chile .. .. .	216,577	214,655	163,574	129,856	177,128
Brazil .. .. .	659	2,412	..	..	..
Uruguay .. .. .	58,559	54,863	23,260	10,635	13,945
Argentine Republic .. .. .	555,712	348,525	261,398	223,070	219,405
Other Foreign Countries .. .. .	534	..	4,744	3,984	3,204
<b>Total, Foreign .. .. .</b>	<b>832,041</b>	<b>620,455</b>	<b>452,976</b>	<b>367,545</b>	<b>413,682</b>
Australia .. .. .	296,577	513,354	845,228	693,878	422,096
New Zealand .. .. .	2,083,185	1,612,378	1,716,799	1,754,720	1,616,778
Other British Countries .. .. .	1,621	2,888	..	..	613
<b>Total, British .. .. .</b>	<b>2,381,383</b>	<b>2,128,620</b>	<b>2,562,027</b>	<b>2,448,598</b>	<b>2,039,487</b>
<b>Grand Total .. .. .</b>	<b>3,213,424</b>	<b>2,749,075</b>	<b>3,015,003</b>	<b>2,816,143</b>	<b>2,453,169</b>

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

Country of Origin.	1932.	1933.	1934.	1935.	1936.
<b>LAMB—QUANTITIES.</b>					
	cwt.	cwt.	cwt.	cwt.	cwt.
Iceland .. .. .	30,661	15,236	..	..	..
United States .. .. .	..	..	..	..	..
Chile .. .. .	144,952	124,368	124,067	118,554	111,209
Brazil .. .. .	4,841	9,929	..	..	..
Uruguay .. .. .	131,220	138,637	124,702	130,176	117,888
Argentine Republic .. .. .	1,017,417	929,420	783,868	754,827	778,176
Other Foreign Countries .. .. .	266	..	27,641	28,561	37,236
<b>Total, Foreign .. .. .</b>	<b>1,329,357</b>	<b>1,217,590</b>	<b>1,060,278</b>	<b>1,032,118</b>	<b>1,044,509</b>
Australia .. .. .	961,140	956,948	1,165,848	1,360,158	1,272,046
New Zealand .. .. .	2,570,958	2,736,546	2,655,611	2,591,399	2,641,880
Other British Countries .. .. .	85	1,404	242	18	558
<b>Total, British .. .. .</b>	<b>3,532,183</b>	<b>3,694,898</b>	<b>3,821,701</b>	<b>3,951,575</b>	<b>3,914,484</b>
<b>Grand Total .. .. .</b>	<b>4,861,540</b>	<b>4,912,488</b>	<b>4,881,979</b>	<b>4,983,693</b>	<b>4,958,993</b>

<b>LAMB—VALUE.</b>					
	£	£	£	£	£
Iceland .. .. .	58,784	38,718	..	..	..
United States .. .. .	..	..	..	..	..
Chile .. .. .	347,020	290,447	365,115	271,858	316,386
Brazil .. .. .	4,046	20,421	..	..	..
Uruguay .. .. .	315,141	314,292	311,953	327,257	316,441
Argentine Republic .. .. .	2,357,467	2,151,109	2,051,554	1,898,688	2,091,908
Other Foreign Countries .. .. .	945	..	67,008	77,642	101,211
<b>Total, Foreign .. .. .</b>	<b>3,083,403</b>	<b>2,814,987</b>	<b>2,795,630</b>	<b>2,575,445</b>	<b>2,825,946</b>
Australia .. .. .	2,199,041	2,395,193	3,320,964	3,934,693	3,707,390
New Zealand .. .. .	7,154,472	7,435,731	8,414,183	8,063,996	8,266,051
Other British Countries .. .. .	290	3,615	674	51	1,529
<b>Total, British .. .. .</b>	<b>9,353,803</b>	<b>9,834,539</b>	<b>11,735,821</b>	<b>11,998,740</b>	<b>11,974,970</b>
<b>Grand Total .. .. .</b>	<b>12,437,206</b>	<b>12,649,526</b>	<b>14,531,451</b>	<b>14,574,185</b>	<b>14,800,916</b>

## § 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 produces 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; the amount so used represented 7 per cent. of the total production in 1935-36.

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 .. .. .	1935-36	108.9	971
United States of America .. .. .	1935-36	52.6	453
Soviet Union .. .. .	1935-36	54.2	167
Argentina Republic .. .. .	1935-36	38.0	360
Union of South Africa .. .. .	1935-36	36.0	250
New Zealand .. .. .	1935-36	29.0	272

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 16 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 5 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, but the figures shown for 1936-37 have been estimated and therefore are subject to revision. Particulars of the gross value of wool produced in Australia are also shown. These values are based upon the average price of greasy wool realized at auction in the principal markets of the Commonwealth:—

**WOOL.—TOTAL PRODUCTION.**

State.	1932-33.	1933-34.	1934-35.	1935-36.	1936-37.(c)
	lb.	lb.	lb.	lb.	lb.
New South Wales (a)	533,710,404	486,152,493	496,876,887	474,359,226	495,600,000
Victoria .. .. .	170,807,900	161,146,436	156,761,979	163,397,896	161,300,000
Queensland .. .. .	185,833,546	169,989,516	174,088,413	142,793,328	160,000,000
South Australia .. .. .	75,727,946	79,288,903	77,790,933	81,709,440	78,000,000
Western Australia .. .. .	81,307,832	85,118,808	95,836,161	92,458,673	66,800,000
Tasmania .. .. .	15,200,000	14,200,000	14,035,000	16,300,000	15,000,000
Northern Territory (b)	35,000	35,000	35,000	35,000	35,000
Total—Quantity	1,062,622,628	995,931,156	1,015,424,373	971,053,563	976,735,000
Value	£ 38,600,000	£ 63,037,000	£ 40,446,000	£ 55,186,000	£ 66,950,000

(a) Including Federal Capital Territory. Subject to revision.

(b) Approximate figures.

(c) Preliminary.

(ii) *Estimate for 1937-38.* No official information is yet available in regard to the production of wool for the season ended June, 1938. In many parts the wool is not yet shorn. At the joint annual conference of the National Council of Wool Selling Brokers and the Australian Wool Growers Council, it was stated that the production was expected to approximate 3,146,000 bales. Should this estimate be realized the total production of wool in Australia for 1937-38 would approximate about 995,000,000 lb.

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 3,668 million lb. in 1935-36, Australia produced 976.7 million lb., or 26.6 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 1,755 million lb., or 47.8 per cent.

#### WOOL.—WORLD'S PRODUCTION.

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

Countries.	Average Annual Pre-war Production. (a)	1931-32.	1932-33.	1933-34.	1934-35.	1935-36.
Australia .. ..	741.4	1,007.5	1,062.3	995.9	1,015.4	976.7
United States .. ..	314.1	404.4	440.5	459.8	451.0	452.7
Argentine Republic ..	358.7	378.0	388.0	385.0	376.0	360.0
Union of South Africa ..	165.9	314.0	330.0	284.0	222.0	250.0
Soviet Union (Russia)	380.0	212.0	142.0	138.0	141.0	167.0
New Zealand .. ..	198.5	282.8	288.4	300.5	276.0	272.0
Uruguay .. ..	157.0	104.0	112.0	95.0	117.0	117.0
China (b) .. ..	100.0	110.0	110.0	110.0	110.0	110.0
United Kingdom .. ..	134.0	113.0	119.0	120.0	115.0	109.0
India (b) .. ..	100.0	100.0	100.0	100.0	100.0	100.0
Spain .. ..	72.0	77.5	80.5	70.0	73.0	66.0
Rumania .. ..	13.2	42.8	43.3	43.3	43.0	42.9
Persia .. ..	12.1	49.0	(b) 49.0	(b) 49.0	(b) 49.0	(b) 49.0
France .. ..	80.7	56.0	54.3	53.8	53.6	52.7
Turkey .. ..	118.0	41.3	41.3	38.9	37.6	43.5
Italy .. ..	55.0	44.0	42.0	41.0	36.0	(b) 36.0
Algeria .. ..	35.2	28.1	39.3	39.0	41.0	43.0
Chile .. ..	17.4	28.5	33.7	27.9	27.9	27.9
Brazil .. ..	35.0	35.0	33.7	35.3	36.4	36.4
Germany .. ..	52.0	32.4	31.5	31.3	32.2	36.3
Yugoslavia .. ..	25.4	27.8	29.5	29.8	30.1	31.0
Canada .. ..	11.2	20.4	20.5	19.2	19.5	19.4
Morocco (French) .. ..	14.9	23.1	26.4	27.0	28.3	32.5
Bulgaria .. ..	23.7	19.8	20.7	20.9	21.3	21.3
Irish Free State .. ..	..	19.3	19.6	19.6	17.0	16.5
Basutoland .. ..	..	9.3	11.8	9.9	5.1	7.3
Falkland Islands .. ..	..	3.9	3.9	4.0	4.0	4.2
Other Countries .. ..	71.2	201.7	189.3	196.6	202.4	188.1
<b>Total .. ..</b>	<b>3,286.6</b>	<b>3,845.6</b>	<b>3,862.5</b>	<b>3,744.7</b>	<b>3,680.8</b>	<b>3,668.4</b>

(a) Average for years 1909 to 1913 inclusive.

(b) Estimated.

6. **Consumption of Locally Processed Wool.**—It is impossible to obtain particulars of the total consumption of wool in Australia, as considerable quantities of manufactures of wool are imported. It is possible, however, to secure with reasonable accuracy the quantities of wool 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 returns from individual mills 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. Reference is made to the woollen mills established in Australia in Chapter XXIV.—Manufacturing Industry.

For reasons mentioned in § 5 par. 2 above, the factor 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.	1931-32.	1932-33.	1933-34.	1934-35.	1935-36.
	lb.	lb.	lb.	lb.	lb.
Wool used in Factories ..	56,640,414	73,687,412	71,753,128	66,371,388	80,809,982
Less Exports of Tops, etc.	6,989,644	8,969,090	11,376,674	10,988,590	11,373,056
Balance .. ..	49,650,770	64,718,322	60,376,454	55,382,798	68,496,926
Add Imports of Tops, etc.	508,934	625,070	505,040	370,680	708,914
Total .. ..	50,159,704	65,343,392	60,881,494	55,753,478	70,205,840

7. **Exports of Wool.**—(i) *Greasy—Quantities.* Of the total weight of greasy wool shipped overseas during the last five years 33 per cent. was sent to the United Kingdom, as compared with 38 per cent. dispatched in pre-war years. The other leading consignees since 1932-33 were Japan, 23 per cent.; Belgium 14 per cent.; France 10 per cent.; and Germany, 8 per cent. The balance of 12 per cent. was distributed among all other countries. The following table shows the quantities of "greasy" wool exported, and the principal countries of recorded destination:—

### WOOL IN THE GREASE.—EXPORTS, AUSTRALIA.

Country to which Exported.	Average Five Years 1909-13.	1932-33.	1933-34.	1934-35.	1935-36.	1936-37
	lb.	lb.	lb.	lb.	lb.	lb.
United Kingdom ..	212,004,088	244,011,182	209,887,487	292,725,835	244,568,575	277,231,854
Other British Countries ..	(a)	1,395,365	1,162,155	1,252,059	2,477,886	2,402,416
Belgium .. ..	55,143,706	89,832,720	92,649,202	124,169,015	102,501,997	127,522,152
France .. ..	149,835,946	122,536,429	65,017,851	75,760,166	64,692,287	76,251,126
Germany .. ..	106,344,696	111,763,527	113,520,765	27,220,923	27,116,447	40,836,650
Italy .. ..	4,381,197	63,099,517	58,549,566	17,694,730	4,502,392	35,912,386
Japan .. ..	7,262,683	106,847,097	170,444,059	196,125,519	234,518,700	84,043,616
Netherlands .. ..	(a)	2,255,552	3,270,646	16,450,416	15,296,631	9,392,711
Poland .. ..	(a)	5,497,748	9,051,704	12,058,266	12,679,782	12,281,023
United States of America ..	15,186,447	5,500,120	5,359,242	5,448,868	24,810,766	72,789,465
Other Foreign Countries ..	6,382,577	7,187,568	6,902,103	16,878,821	18,722,130	20,664,281
Total .. ..	556,841,340	849,927,425	735,823,780	785,784,621	751,887,602	759,327,680

(a) Included with Other Foreign 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.	1932-33.	1933-34.	1934-35.	1935-36.	1936-37.
	(a)					
	lb.	lb.	lb.	lb.	lb.	lb.
United Kingdom ..	32,032,577	33,277,812	31,765,177	34,462,119	31,860,364	33,614,377
Canada ..	(b)	1,326,254	1,736,820	1,229,816	2,145,371	3,033,270
Other British Countries	(b)	926,298	539,030	716,018	819,726	1,055,476
Belgium ..	7,528,058	10,101,445	14,691,550	10,733,445	10,681,773	8,872,981
France ..	16,068,910	9,828,929	5,863,131	9,843,830	10,835,868	7,680,853
Germany ..	12,310,967	8,919,763	11,140,270	2,879,686	3,927,532	3,510,872
Italy ..	265,442	2,547,945	2,552,684	728,040	129,176	593,359
Japan ..	1,888,161	4,147,808	1,788,995	549,812	1,261,865	299,573
Poland ..	(b)	1,095,878	1,526,197	1,187,553	1,995,743	794,351
Other Foreign Countries	252,995	1,105,918	1,420,058	4,164,117	4,567,106	7,388,264
Total ..	70,347,110	73,278,050	73,023,912	66,494,466	68,224,524	66,843,376

(a) Including "tops."

(b) Included with Other Foreign Countries.

(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 1931-32. These three items have been combined in the following table:—

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

Country to which Exported.	1931-32.	1932-33.	1933-34.	1934-35.	1935-36.	1936-37.
	lb.	lb.	lb.	lb.	lb.	lb.
United Kingdom ..	1,309,028	2,022,055	2,480,627	2,251,031	1,810,423	1,263,245
Canada ..	1,200,909	1,507,084	1,746,531	2,040,586	2,081,330	2,194,586
India ..	182,973	199,503	79,217	118,407	99,023	170,822
Other British Countries	37,950	25,549	28,484	27,626	81,328	101,981
Belgium ..	80,230	2,152	18,628	455	144,713	7,052
Germany ..	125,882	104,844	73,506	..	..	626
Italy ..	..	22,891	85,911	345,451	84,355	..
Japan ..	533,355	565,655	1,074,136	477,608	553,084	184,574
Other Foreign Countries	18,900	30,479	95,703	228,235	818,475	1,565,974
Total ..	3,489,227	4,480,212	5,682,743	5,489,399	5,672,731	5,488,860

(iv) *Total Value of Exports.* The total value of the wool exported from Australia during the five years ending 1936-37 averaged 43 per cent. of the value of the total exports of merchandise of local origin, while during 1936-37 the proportion was approximately the same. 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.	1932-33.	1933-34.	1934-35.	1935-36.	1936-37.
	£	£	£	£	£	£
United Kingdom ..	10,608,967	11,479,976	17,762,789	16,007,777	18,379,416	23,049,791
Other British Countries	(a)	350,820	526,133	409,286	657,572	945,717
Belgium ..	2,546,915	3,376,311	6,864,323	5,433,157	6,184,099	8,545,125
France ..	6,494,832	4,996,827	4,691,794	3,558,066	4,413,359	5,453,806
Germany ..	5,131,282	4,561,536	8,698,904	1,511,094	2,052,436	3,520,874
Italy ..	202,434	2,567,680	4,237,212	807,775	273,549	2,606,427
Japan ..	516,528	7,969,600	12,127,621	8,680,119	14,594,465	7,513,332
Netherlands ..	(a)	119,867	303,844	825,971	1,058,533	685,917
Poland ..	(a)	281,268	784,609	617,064	968,108	914,386
United States of America	795,328	337,215	485,840	352,466	2,102,066	7,042,121
Other Foreign Countries	296,356	360,833	642,457	1,063,165	1,661,958	2,253,766
Total ..	26,592,642	36,407,933	57,125,526	39,265,940	52,345,561	62,522,262

(a) Included with Other Foreign 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 were more than maintained in 1936-37 when the price averaged 16.48d. per lb. 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 1935-36 was valued at £55,186,000 compared with £40,446,000 in 1934-35, £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 1931-32 to 1935-36 the annual clip was valued at £46,500,000.

The value of the clip for 1936-37 is estimated at £66,950,000, but as complete details in regard to production are not yet available this figure is subject to revision.

The following table gives the average auction room price in Australia of greasy wool as compiled by the National Council of Wool-selling Brokers. This price represents the average price realized for all greasy wool of whatever type or quality marketed during the years indicated.

**WOOL.—AVERAGE MARKET PRICE PER LB.**

Description.	1930-31.	1931-32.	1932-33.	1933-34.	1934-35.	1935-36.	1936-37.
	<i>d.</i>	<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	16.48

(a) National Council of Wool-selling Brokers.

Measured in terms of Australian, sterling and gold currencies the approximate values of greasy wool per lb. since 1929-30 were 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
1936-37 .. ..	16.48	13.16	8.03

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 1935 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, 1935.**

Country.	Quantity.	Value.	Country.	Quantity.	Value.
	lb.	£		lb.	£
Australia ..	364,502,100	16,949,010	Other British Possessions ..	5,490,900	190,152
New Zealand ..	172,233,300	6,765,867	Peru ..	2,727,500	116,299
Union of South Africa ..	120,021,000	4,795,320	Belgium ..	2,972,400	191,150
Argentine Republic ..	82,573,400	2,114,660	Falkland Islands	2,760,800	89,294
India ..	40,774,000	1,254,149	Germany ..	949,700	43,428
Uruguay ..	19,826,100	853,916	United States of America ..	752,600	25,924
France ..	20,725,200	1,293,129	Other Countries	4,385,600	170,379
Chile ..	13,011,100	406,714			
Irish Free State	10,354,800	323,422	Total ..	804,060,500	35,582,813

(a) Greasy and Scoured.

Of the importations of wool into the United Kingdom, Australian wool represented 42 per cent. of quantity and 48 per cent. of value, and New Zealand 20 per cent. of quantity and 19 per cent. of value. Altogether, 716,136,900 lb., valued at £30,367,214, were received from British Possessions, these figures being equivalent to 83 per cent. of the total weight and 85 per cent. of the total value of all wool imported.

Preliminary figures show that during 1936, 914.2 million lb. of wool were imported into the United Kingdom; the chief sources of supply were Australia 338.6 million lb., New Zealand 232.7 million lb., Union of South Africa 108.9 million lb., and Argentine Republic 81.4 million lb., a total of 761.6 million lb. or 83 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 and 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 ..	109.0	364.5	120.2	82.6	172.2	124.5	861.0
Belgium ..	0.7	138.5	19.2	23.1	4.2	49.8	234.8
Czechoslovakia ..	1.8	9.2	1.2	4.0	0.4	22.7	37.5
France ..	52.7	206.0	65.6	55.9	18.7	38.9	385.1
Germany ..	36.3	36.6	73.8	59.2	5.4	97.8	272.8
Italy ..	36.0	18.1	24.0	35.4	..	38.5	116.0
Japan ..	..	228.4	2.6	0.9	7.2	4.1	243.5
Poland ..	10.6	14.8	4.2	7.1	4.7	10.0	40.8
Spain ..	66.0	7.2	1.0	2.8	..	1.2	78.2
Soviet Union	167.0	8.1	..	..	..	62.3	70.1
United States of America ..	452.7	10.0	0.5	50.4	10.9	128.7	200.5
<b>Total ..</b>	<b>..</b>	<b>1,041.4</b>	<b>312.3</b>	<b>321.4</b>	<b>223.7</b>	<b>578.8</b>	<b>2,477.6</b>

(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 1935 were :—United Kingdom, 374.0 million lb., or 43.3 per cent. of the total imports ; Belgium, 117.2 million lb., or 49.9 per cent. ; France, 47.7 million lb., or 12.4 per cent. ; and Germany, 3.3 million lb., or 1.2 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. For fuller details see Official Year Book No. 29, page 644.

## § 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 numbers and values 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 paragraphs 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

These skins were shipped principally to the United States of America and the United Kingdom, the values taken by each during 1935-36 being as follows :—

**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 .. .. .	11,034	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