

CHAPTER XXI.

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 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 number 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	(a)
1st July, 1794	(b) 20	40	576	(a)	522
15th June, 1795	(c) 49	176	832	(a)	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 stated.

(b) Excludes three asses.

(c) Excludes seven asses.

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 only 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 1934 onwards in single years are given in the following table, and are shown continuously on the graph on page 706.

During the eighty-three years covered by the table the live stock of Australia increased considerably, horses, 251 per cent. ; cattle, 254 per cent. ; sheep, 518 per cent. ; and pigs, 345 per cent. The average annual increases which these aggregates represent are as follows :—Horses, 1.52 per cent. ; cattle, 1.53 per cent. ; sheep, 2.22 per cent. ; and pigs, 1.82 per cent.

LIVE STOCK : AUSTRALIA.

Year.	Horses.	Cattle.	Sheep.	Pigs.
1860	431,525	3,957,915	20,135,286	351,096
1870	716,772	4,276,326	41,593,612	543,388
1880	1,068,774	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
1934	1,763,225	13,512,486	109,921,053	1,046,867
1935	1,767,758	14,048,671	113,048,937	1,158,274
1936	1,764,430	13,911,659	108,875,801	1,293,964
1937	1,762,750	13,491,872	110,242,704	1,202,752
1938	1,746,513	13,078,356	113,372,518	1,100,082
1939	1,724,056	12,861,781	111,057,832	1,155,591
1940	1,698,797	13,080,180	119,305,391	1,455,341
1941	1,665,616	13,255,841	122,694,025	1,797,340
1942	1,611,059	13,560,754	125,189,129	1,477,303
1943 (31st March)	1,517,970	14,005,320	124,614,672	1,563,000

4. **Fluctuations.**—The increases referred to, however, have not been continuous, marked fluctuations having taken place during the period, mainly on account of droughts which have from time to time left their impress on the pastoral history of Australia. These occurred in 1868, 1877, 1883-4, 1892, 1893, 1895, 1901-2, 1912, 1914, 1918, 1919, 1922-23, 1925-26, 1927-28, 1929-30 and 1940-41.

The years in which the number of live stock attained their maxima are as follows :—Horses, 1918, 2,527,149 ; cattle, 1921, 14,441,309 ; sheep, 1942, 125,189,129 ; and pigs, 1941, 1,797,340.

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 eighty-three years as shown in the following 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	1930 ..	0.28	1.81	17.07	0.17
1870 ..	0.43	2.60	25.24	0.33	1938 ..	0.26	1.91	16.59	0.16
1880 ..	0.48	3.37	27.87	0.37	1939 ..	0.25	1.87	16.11	0.16
1890 ..	0.48	3.17	31.06	0.28	1940 ..	0.24	1.86	16.97	0.21
1900 ..	0.43	2.29	18.75	0.25	1941 ..	0.23	1.87	17.28	0.25
1910 ..	0.49	2.65	22.16	0.23	1942 ..	0.22	1.89	17.46	0.21
1920 ..	0.44	2.49	15.11	0.14	1943 ..	0.21	1.94	17.24	0.22

6. Live Stock in Relation to Area.—The number 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, 1943.

State or Territory.	Horses.	Cattle.	Sheep.	Pigs.
New South Wales	1.56	9.79	181.12	1.57
Victoria	3.33	23.02	223.18	3.50
Queensland	0.59	9.64	38.26	0.61
South Australia	0.43	1.12	27.29	0.41
Western Australia	0.12	0.85	10.68	0.16
Tasmania	1.03	9.33	84.95	1.88
Northern Territory	0.08	1.87	0.07	0.00
Australian Capital Territory	1.22	7.42	266.61	0.83
Australia	0.51	4.71	41.89	0.53

7. Minor Classes of Live Stock.—Excluding Victoria, where the details are not available, the number of minor classes of live stock returned for 1941, were as follows :— Goats, 80,366; camels, 2,267; and mules and donkeys, 10,881. Of these, goats were most numerous in Queensland, and camels, mules and donkeys in Western Australia. In the raising of goats, some attention has been devoted to the angora goat and its product (mohair), and upwards of 5,000 angora goats are included in the number of goats shown above. Of these, 1,640 were in New South Wales, 1,000 in Queensland, 1,531 in South Australia, and 284 in Tasmania.

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 1938-39 to 1942-43 were as follows :—

NET EXPORTS OF PASTORAL PRODUCTS : AUSTRALIA.

Product.	Unit of Quantity.	1938-39.	1939-40.	1940-41.	1941-42.	1942-43.
QUANTITIES.						
Animals (living)—						
Cattle	No.	405	371	248	56	322
Horses	"	2,294	1,503	1,668	222	1,110
Sheep	"	66,739	72,385	86,265	64,750	5,107
Bones	Cwt.	21,497	11,854	2,252	8,502	—200
Glue-pieces and Sinews	"	—11,145	—15,651	—5,443	—7,209	—10,660
Glycerine	lb.	78,727	—683,076	—1,940,472	—2,016,918	—705,483
Hair	"	—1,003,366	—2,650,898	—1,259,343	—1,402,642	—327,684
Hoofs	Cwt.	(a)	(a)	(a)	1,086	(a)
Horns	"	(a)	(a)	(a)	(a)	(a)
Meats—						
Frozen Beef (b)	lb.	271,948,548	273,892,215	198,625,039	117,070,259	22,621,078
" Mutton and Lamb	"	186,487,551	248,666,663	238,925,384	174,914,611	203,681,520
" Rabbits and Hares	Pair	(a)	(a)	(a)	(a)	(a)
" Other	lb.	19,588,368	25,810,972	23,718,637	8,672,238	15,351,235
Potted, and Extract of	"	(a)	(a)	(a)	(a)	(a)
Preserved in Tins, etc.	lb.	14,778,396	23,143,950	42,444,796	94,059,281	66,736,683
Other (excluding Bacon and Ham)	"	308,448	732,892	1,321,135	696,512	2,913,961
Sausage Casings	Cwt.	8,673	4,427	17,178	11,191	14,601
Skins—						
Hides	No.	(a)	(a)	(a)	(a)	(a)
Sheep	"	(a)	(a)	(a)	(a)	(a)
Rabbit and Hare	Cwt.	37,544	(c) 65,319	(c) 88,313	(c) 76,831	(c) 54,773
Other (including Undressed Furs)	"	(a)	(a)	(a)	(a)	(a)
Tallow	Cwt.	560,241	803,096	548,428	652,630	99,059
Wool—						
Greasy	lb.	779,781,662	791,663,332	486,744,671	735,134,359	516,775,265
Scoured	"					
Tops	"					
Noils	"	70,299,595	77,817,838	60,079,146	92,245,202	51,666,359
Waste	"					

(a) Quantity not available. (b) Includes chilled beef. (c) Rabbit skins only.

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

The values of the net exports for the same five years are furnished in the next table, and amount to £317,124,804 for the period, or an average of £63,424,961 per annum, of which wool represents 74.86 per cent. Meat, skins and tallow rank next in order of importance.

NET EXPORTS OF PASTORAL PRODUCTS : AUSTRALIA.

Product.	1938-39.	1939-40.	1940-41.	1941-42.	1942-43.
VALUES. (a)					
	£	£	£	£	£
Animals (living)—					
Cattle	142	2,111	3,214	— 38	6,193
Horses	—11,258	—20,594	89,005	16,172	35,089
Sheep	39,405	58,508	86,872	49,280	6,269
Bones	10,741	6,541	2,768	4,609	— 41
Glue-pieces and Sinews	—7,796	—10,750	—3,600	—7,221	—9,444
Glycerine	4,004	—13,429	—73,713	—149,830	—48,633
Hair	—103,353	—157,920	—184,941	—188,193	—13,007
Hoofs	8,027	6,123	4,897	755	..
Horns	18,615	13,462	3,253	1,993	520
Meats—					
Frozen Beef(b)	4,323,235	4,825,237	3,761,732	2,484,259	560,498
" Mutton and Lamb	4,807,418	6,082,341	6,142,479	4,669,871	5,495,886
" Rabbits and Hares	232,031	355,436	102,175	8,901	12,917
" Other	417,670	590,259	630,998	269,909	430,537
Potted, and Extract of	—32,580	—25,135	47,620	96,900	87,407
Preserved in Tins, etc.	492,709	916,609	1,867,208	4,543,550	3,018,150
Other (excluding Bacon and Ham)	6,336	16,430	28,169	18,207	298,502
Sausage Casings	185,649	52,739	203,724	12,273	268,353
Skins—					
Hides	775,398	551,892	402,228	— 89,361	— 339,523
Sheep	2,336,718	2,357,884	975,458	2,136,428	1,385,480
Rabbit and Hare	393,641	(c) 881,777	62,201,420	63,365,751	61,986,198
Other (including Undressed Furs)	—287,277	—368,355	228,430	107,880	65,715
Tallow	480,459	846,534	554,635	830,695	185,945
Wool—					
Greasy	36,617,167	46,758,717	32,553,757	47,747,308	37,613,502
Scoured					
Tops					
Noils					
Waste	5,277,117	7,245,209	6,729,935	10,151,025	6,623,638
Total Values	55,984,221	70,971,626	56,357,633	76,141,123	57,670,201

(a) Australian currency values.

(b) Includes chilled beef.

(c) Rabbit skins only.

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

9. Value of Pastoral Production.—(i) *General.* Particulars of the gross, local and net values of pastoral production for each State are shown in the following table for 1942-43. Fuller details of the source of the information and an explanation of the terms used in this compilation will be found in Chapter XXVII. "Miscellaneous". Maintenance costs have not been computed in all States and depreciation has not been deducted; consequently the net values are inflated to the extent of these costs.

GROSS, LOCAL AND NET VALUES OF PASTORAL PRODUCTION, 1942-43.

State.	Gross Production valued at Principal Markets.	Marketing Costs.	Gross Production valued at Farm.	Farm Costs.		Net Value of Production. (a)
				Seed used, and Fodder for Farm Stock.	Value of other materials used in process of Production.	
	£	£	£	£	£	£
New South Wales ..	43,487,000	3,980,000	39,507,000	1,020,000	(b)275,000	38,212,000
Victoria ..	27,716,502	1,976,601	25,739,901	430,000	543,252	24,766,649
Queensland ..	25,681,000	2,380,000	23,301,000	920,000	370,000	22,011,000
South Aust. ..	8,458,490	864,253	7,594,237	232,951	228,811	7,132,475
Western Aust.	8,077,390	742,789	7,334,601	368,686	282,473	6,683,442
Tasmania ..	2,471,770	183,770	2,288,000	56,720	22,670	2,208,610
Total ..	115,892,152	10,127,413	105,764,739	3,028,357	1,722,206	101,014,176

(a) No deduction has been made for depreciation and maintenance. (b) No allowances made for costs of power, power kerosene, petrol and other oils.

(ii) States 1933-34 to 1942-43. The following table shows the net value of pastoral production by States and the net value per head of population, for the years 1933-34 to 1942-43:—

VALUE OF PASTORAL PRODUCTION.

Year.	N.S.W.	Vic.	Qld.	S.A.	W.A.	Tas.	Total.
NET VALUE. (a)							
	£	£	£	£	£	£	£
1933-34	31,259,000	15,993,468	12,833,102	4,560,947	5,642,524	1,607,550	74,806,591
1934-35	23,311,000	13,305,109	11,904,135	3,181,285	3,916,280	1,040,090	55,738,499
1935-36	32,799,000	17,422,400	11,561,000	4,602,656	5,350,216	1,492,460	73,227,732
1936-37	39,300,000	19,502,210	14,112,000	5,217,256	4,597,200	1,692,580	84,421,276
1937-38	33,939,000	18,533,223	15,364,000	4,856,629	4,003,310	1,470,580	78,166,742
1938-39	23,613,000	15,156,276	14,881,000	5,054,784	3,666,461	1,449,590	63,821,111
1939-40	34,562,000	16,434,392	17,693,000	6,206,617	4,689,845	1,802,150	81,388,004
1940-41	35,305,000	18,629,094	17,624,000	6,084,562	4,519,541	1,789,450	83,951,647
1941-42	34,121,000	20,467,898	18,117,000	5,779,743	4,879,433	1,993,050	85,358,124
1942-43	38,212,000	24,766,649	22,011,000	7,132,475	6,683,442	2,208,610	101,014,176

NET VALUE PER HEAD OF MEAN POPULATION. (a)

	£ s. d.	£ s. d.	£ s. d.	£ s. d.	£ s. d.	£ s. d.	£ s. d.
1933-34	13 2 3	8 14 3	13 10 0	7 16 7	12 16 3	7 0 4	11 4 9
1934-35	8 16 11	7 4 10	11 9 0	5 8 11	8 16 9	4 10 10	8 6 5
1935-36	12 6 11	9 9 1	11 17 10	7 17 0	11 18 11	6 9 7	10 16 11
1936-37	14 13 2	10 10 7	14 6 10	8 17 4	10 3 6	7 5 9	12 8 2
1937-38	12 10 7	9 19 2	15 8 9	8 4 5	8 15 1	6 5 2	11 7 9
1938-39	8 12 9	8 1 8	14 15 7	8 10 1	7 18 5	6 2 4	9 4 3
1939-40	12 10 5	8 13 11	17 6 9	10 7 5	10 0 3	7 10 8	11 12 8
1940-41	12 13 9	9 14 0	17 1 5	10 3 1	9 11 2	7 8 11	11 17 6
1941-42	12 3 6	10 9 7	17 9 0	9 10 4	10 8 3	8 6 2	11 19 2
1942-43	13 10 0	12 11 4	21 2 1	11 12 9	13 18 4	9 3 0	14 0 7

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

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, but it is uncertain whether they have been compiled on the same basis.

The average consumption in Australia is slightly lower than that in New Zealand, but it is greatly in excess of that in Canada, United Kingdom and the United States of America. 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 for both 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 Argentina, Australia, New Zealand and Uruguay are the main contributors. Argentina 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 the greatest in the southern producing countries, and pig meat in the northern.

ESTIMATED PER CAPITA CONSUMPTION OF MEAT: AUSTRALIA AND OTHER COUNTRIES.

Description.	Australia, 1942-43.	New Zealand.	Great Britain, 1937.	Canada, 1938.	United States of America, 1939.
	lb.	lb.	lb.	lb.	lb.
Beef and Veal ..	149.11	140-150	69	63.2	60.8
Mutton and Lamb ..	99.16	82	30	5.8	6.6
Pork and Bacon and Ham..	(a) 11.86	22	42	56.8	63.6
Total All Meats ..	a260.13	(b) 249	141	125.8	131.0

(a) Excludes Bacon and Ham.

(b) Excludes Veal.

§ 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 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. Owing to the mechanization of the Army the demand has not been 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.

Year.	N.S.W.	Vic.	Q'land.	S. Aust.	W. Aust.	Tas.	N.T.	A.C.T.	Total.
1939	531,355	343,828	444,521	195,834	143,674	30,458	33,191	1,195	1,724,056
1940	534,837	326,217	444,956	190,013	139,207	29,605	32,721	1,241	1,698,797
1941	531,776	318,441	441,770	182,206	130,057	29,406	30,716	1,244	1,665,616
1942	525,697	302,401	431,363	171,092	124,402	28,612	26,209	1,283	1,611,059
1943	483,277	292,534	392,639	164,855	112,782	27,077	43,663	1,143	1,517,970

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 had 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 the rate of decline has slightly increased, despite the introduction of rationing of motor spirit as a war-time measure.

The number of horses in Australia from 1860 onwards may be obtained from the graph on page 706.

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 1943 were :—New South Wales, 31.84; Victoria, 19.27; Queensland, 25.87; South Australia, 10.86; Western Australia, 7.42; Tasmania, 1.78; Northern Territory, 2.88; and Australian Capital Territory, 0.08 per cent.

The percentages in the various States have remained fairly 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 Australian Capital Territory and Tasmania have 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 1943 the relative numbers were :—New South Wales, 0.17; Victoria, 0.15; Queensland, 0.38; South Australia, 0.27; Western Australia, 0.24; Tasmania, 0.11; Northern Territory, 4.27; Australian Capital Territory, 0.11; and Australia, 0.21.

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

HORSES : NUMBER IN PRINCIPAL COUNTRIES.

Country.	Year.	Number of Horses (,000 omitted).	Country.	Year.	Number of Horses (,000 omitted).
U.S.S.R. (Russia) ..	1938	17,500	Turkey	1938	651
U.S.A.	1938	10,800	Uruguay	1930	623
Argentina	1937	8,527	Sweden	1938	617
Brazil	1935	6,052	Cuba	1934	569
China	1935	4,080	Spain	1933	568
Poland	1938	3,886	Denmark	1938	565
Germany	1938	3,443	Lithuania	1938	558
Canada	1938	2,821	Bulgaria	1934	532
France	1938	2,692	Chile	1936	528
India (British and Native)	1936	2,380	Eire	1938	442
Rumania	1937	2,167	Peru	1932	432
Mexico	1932	1,888	Haiti	1935	400
Manchuria	1936	1,840	Latvia	1938	400
Australia	1939	1,724	Bolivia	1932	390
Japan	1936	1,432	Thailand	1938	386
Yugoslavia	1938	1,265	Finland	1937	380
United Kingdom ..	1938	1,100	Greece	1937	372
Colombia	1934	972	Netherlands ..	1938	312
Hungary	1938	814	New Zealand ..	1938	278
Italy	1938	791	Belgium	1938	265
Union of South Africa	1937	778	Austria	1938	246
Czechoslovakia ..	1936	704	Estonia	1938	219
Dutch East Indies ..	1937	671	French Morocco ..	1938	192
			Paraguay	1935	186

6. *Oversea Trade in Horses.*—(i) *Exports.* Australia's export trade in horses is far below that of earlier years. During the period 1901-5 the average number exported was over 18,000, whereas during the last five years the figure was 1,463. The total number of horses exported during the latter period amounted to 7,316, valued at £410,255 equal to an annual average of 1,463, valued at £82,051. The average export price was £56 1s. 8d. The horses exported to India, where they are largely used for army remounts, averaged 65 or 48 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 racehorses from New Zealand. The average value per head of the horses imported during the last five years was £A580. The average number imported per annum was, however, only 104, and the average annual value, £60,368. The following tables gives the imports, exports and net exports of horses during each of the years from 1938-39 to 1942-43 :—

HORSES : IMPORTS AND EXPORTS, AUSTRALIA.

Year.	Imports.		Exports.		Net Exports.	
	No.	Value.	No.	Value.	No.	Value.
		£ A.		£ A.		£ A.
1938-39 ..	238	125,192	2,532	113,934	2,294	- 11,258
1939-40 ..	190	100,688	1,693	80,094	1,503	- 20,594
1940-41 ..	51	39,619	1,719	128,624	1,668	89,005
1941-42 ..	35	33,075	257	49,247	222	16,172
1942-43 ..	5	3,268	1,115	38,356	1,110	35,088

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 was the principal cattle-raising State, but in that year Queensland occupied the leading position, which it has since maintained. There was a very 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 14,441,300 cattle was attained in 1921. After that year the number dropped continuously to 1929, largely owing to the decline in the overseas demand for frozen beef. They recovered with the expansion of dairying during the depression years, but a decline of nearly 1,000,000 occurred since 1934. In 1943 the upward movement commenced in 1940 was continued in all States excepting Western Australia and Tasmania, and the total number of cattle (14,005,320) is now at its highest level since 1935. A graph showing the number of cattle in Australia from 1860 appears on page 706.

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.

Year.	N.S.W.	Vic.	Q'land.	S. Aust.	W. Aust.	Tas.	Nor. Terr.	Aus. Cap. Terr.	Total.
1939	2,811,884	1,697,295	6,097,080	318,897	767,680	262,407	899,472	7,057	12,861,781
1940	2,762,653	1,787,597	6,198,798	351,013	799,175	252,484	922,581	5,879	13,080,140
1941	2,769,061	1,922,336	6,210,810	376,654	788,928	259,108	922,308	6,636	13,255,841
1942	2,878,450	1,986,544	6,303,467	399,143	839,731	253,106	892,881	7,432	13,560,754
1943	3,030,546	2,022,892	6,466,316	424,253	831,231	244,681	978,434	6,967	14,005,320

Although the proportion is not as high as it has been in the past, Queensland was carrying 46.17 per cent. of the cattle in Australia in 1943. The percentage in each State and Territory during 1943 was :—New South Wales, 21.64 ; Victoria, 14.44 ; Queensland, 46.17 ; South Australia, 3.03 ; Western Australia, 5.93 ; Tasmania, 1.75 ; Northern Territory, 6.99 ; Australian Capital Territory, 0.05.

A graph showing the distribution of cattle in Australia during 1938–39 is shown in the Official Year Book No. 34, p. 453. A similar graph showing the distribution during 1924–25 is shown in Official Year Book No. 22, p. 660.

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)	1936	119,437	Czechoslovakia	1937	4,935
U.S.A.	1938	66,821	Cuba	1935	4,651
U.S.S.R. (Russia)	1938	63,200	New Zealand	1938	4,506
Brazil	1935	40,514	Dutch East Indies	1937	4,414
Argentina	1937	33,101	Yugoslavia	1938	4,268
China	1935	22,647	Rumania	1937	4,184
Germany	1938	19,911	French Equatorial and West Africa	1937	4,073
France	1938	15,622	Eire	1938	4,056
Australia	1939	12,862	Spain	1933	3,570
Union of South Africa	1937	11,395	Denmark	1938	3,238
Poland	1938	10,554	Paraguay	1935	3,052
Mexico	1930	10,083	Sweden	1938	3,036
United Kingdom	1938	8,903	Nigeria	1937	2,985
Colombia	1935	8,337	Rhodesia	1937	2,936
Uruguay	1937	8,297	Netherlands	1938	2,764
Canada	1938	8,091	Venezuela	1929	2,750
Italy	1938	7,667	Sudan (Anglo-Egyptian)	1938	2,700
Turkey	1938	5,896	Austria	1936	2,596
Thailand	1938	5,712	Uganda	1938	2,582
Kenya	1932	5,214	Chile	1937	2,460
Tanganyika Territory	1937	5,035	Bolivia	1931	2,064
Madagascar	1937	4,947			

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 for the last five years are as follows:—

CATTLE : IMPORTS AND EXPORTS, AUSTRALIA.

Year.	Imports.		Exports.		Net Exports.	
	No.	Value.	No.	Value.	No.	Value.
		£A.		£A.		£A.
1938-39 ..	42	9,431	447	9,573	405	142
1939-40 ..	48	5,555	419	7,666	371	2,111
1940-41 ..	15	1,359	263	4,573	248	3,214
1941-42 ..	25	1,313	81	1,275	56	—38
1942-43 ..	14	1,655	336	7,848	322	6,193

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

The average value of the cattle imported during the last five years was £A1 34 2s. 4d. per head, while the average value of the cattle exported during the same period was £20 os. 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 1938 to 1942 is given in the following table:—

CATTLE (INCLUDING CALVES) SLAUGHTERED.

Year.	N.S.W. (a)	Victoria. (b)	Q'land. (b)	S. Aust.	W. Aust.	Tas. (b)	N. Terr.	A.G.T. (b)	Total.
1938	1,136,024	811,703	1,284,465	160,044	126,580	50,397	9,105	2,609	3,580,927
1939	1,122,956	737,260	1,256,953	151,135	118,648	48,428	6,072	2,620	3,444,072
1940	901,725	722,604	1,136,796	156,537	114,862	48,246	10,271	2,858	3,093,899
1941	1,040,623	753,817	1,105,586	153,667	111,092	50,819	10,300	2,814	3,228,718
1942	1,060,679	753,224	1,063,541	176,743	105,248	52,739	40,727	3,600	3,256,501

(a) Year ended 31st March of year following.

(b) Year ended 30th June of year following.

6. **Production and Consumption of Beef.**—The production of beef in Australia during 1942-43 was estimated at 1,197,210,395 lb. The local market absorbed 1,073,427,336 lb. or approximately 90 per cent., leaving a balance of 123,783,059 lb. or 10 per cent., which was exported as frozen, chilled or canned beef. (See also § 1 par. 10.) Beef consumption per head over the last five years was as follows:—1938-39, 139 lb. per head; 1939-40, 128 lb. per head; 1940-41, 126 lb. per head; 1941-42, 120 lb. per head; and 1942-43, 149 lb. per head. The sudden increase in per capita consumption of beef in 1942-43 after a steady fall over the previous four years is due to the increased consumption by Allied Servicemen in Australia.

7. **Exports of Frozen Beef.**—The export of frozen meat from Australia dates from about 1881, and since that year the trade had grown considerably, the quantities and values exported during each of the five years ended 1942-43 being as follows:—1938-39, 271,963,829 lb., £4,323,680; 1939-40, 273,892,251 lb., £4,619,058; 1940-41, 194,576,226 lb., £3,680,940; 1941-42, 116,340,293 lb., £2,476,172 and 1942-43, 22,419,121 lb., £555,285. Chilled beef is included in the foregoing. In normal times the largest purchaser of Australian beef is the United Kingdom, which during 1938-39 took £3,901,691, or about 90.2 per cent. of the total shipments. Other countries importing Australian beef were in order of importance Egypt, Malaya (British), Malta, Philippine Islands and Hong Kong; these countries, together with the United Kingdom, accounted for 98.6 per cent. of the total value of export.

In view of the preference for chilled beef overseas the Australian beef industry was at a serious disadvantage until investigations proved that beef could be successfully transported from Australia to United Kingdom in a chilled condition. Trial shipments of 254,000 lb. in 1932-33 and 1,515,000 lb. in 1933-34 were made, and the exports in subsequent years increased as follows:—1934-35, 21,570,928 lb., £322,239; 1936-37 41,869,695 lb., £608,175; and 1938-39, 58,963,009 lb., £988,148. However the advent of war seriously affected the export trade in chilled beef, which decreased as follows:—1939-40, 12,786,859 lb., £206,353; 1940-41, nil; 1941-42, 1,697 lb., £70 and 1942-43, 1,843 lb., £69.

8. **War-time Contract.**—The Government of the United Kingdom has contracted to purchase Australian beef. Fuller particulars will be found in Chapter XXVII. "Miscellaneous".

9. **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.

10. **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 1935 to 1939. Later details are not available for publication.

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

Country of Origin.	1935.	1936.	1937.	1938.	1939.
CHILLED—QUANTITY.					
	Cwt.	Cwt.	Cwt.	Cwt.	Cwt.
Brazil	508,512	508,653	496,818	517,374	500,982
Uruguay	561,560	545,283	583,689	558,708	428,076
Argentina	6,937,141	7,108,768	6,993,075	6,888,542	5,225,350
Australia	228,473	295,433	451,967	527,608	430,396
Other British Countries	249,863	321,548	444,150	471,269	439,344
Total Chilled	8,485,549	8,779,685	8,969,699	8,963,501	7,024,148
CHILLED—VALUE.					
	£	£	£	£	£
Brazil	793,741	809,936	909,703	981,920	916,904
Uruguay	907,452	839,141	1,046,813	1,046,882	775,465
Argentina	11,529,888	12,001,446	13,449,779	13,788,986	10,338,878
Australia	352,090	457,663	857,343	985,526	767,081
Other British Countries	376,583	442,696	793,989	873,038	763,112
Total Chilled	13,959,754	14,550,882	17,057,627	17,676,352	13,561,440
FROZEN—QUANTITY.					
	Cwt.	Cwt.	Cwt.	Cwt.	Cwt.
Brazil	11,245	3,421	7,900	3,879	3,355
Uruguay	41,971	36,090	53,974	72,147	116,352
Argentina	93,933	113,479	111,798	158,522	1,746,760
Other Foreign Countries .. .. .	..	..	1	..	739
Australia	1,104,511	1,055,162	1,325,749	1,186,955	1,317,318
New Zealand	464,758	277,904	246,999	207,486	230,727
Other British Countries	4,509	4,248	12,413	1,454	31,960
Total Frozen	1,720,927	1,490,304	1,758,834	1,630,443	3,447,211
Grand Total (Chilled and Frozen)	10,206,476	10,269,989	10,728,533	10,593,944	10,471,359

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

Country of Origin.	1935.	1936.	1937.	1938.	1939.
FROZEN—VALUE.					
	£	£	£	£	£
Brazil	17,417	5,230	12,199	6,768	6,962
Uruguay	78,018	62,610	94,434	134,471	233,888
Argentina	159,524	172,338	199,506	290,141	3,741,428
Other Foreign Countries .. .. .	..	..	2	..	1,388
Australia	1,481,103	1,316,743	1,969,902	1,885,549	2,139,052
New Zealand	606,849	344,012	363,996	313,359	332,519
Other British Countries	6,134	5,143	18,792	2,054	68,068
Total Frozen	2,349,045	1,906,076	2,658,831	2,632,342	6,523,305
Grand Total (Chilled and Frozen)	16,308,799	16,450,958	19,716,458	20,308,694	20,084,745

§ 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 occupied the premier position in sheep-raising, and practically one-half of the sheep of Australia are in this State.

A graph showing the distribution of sheep in Australia during 1938-39 is shown in the Official Year Book No. 34, p. 452. A similar graph showing the distribution of sheep during 1924-25 was published in Official Year Book No. 22, p. 659.

Fluctuations in the number of sheep recorded for each year in Australia from 1860 onwards may be seen from the graph on page 706. Five marked periods of decline depleted the numbers at successive intervals, but these losses were made up rapidly. In every year since 1925 the sheep flocks have exceeded 100 millions, reaching 125,189,129 in 1942, the greatest number recorded in Australia. At no previous period have such large numbers been depastured continuously, and the development has taken place despite an average annual slaughter of approximately nineteen million sheep and lambs for the mutton and lamb trade.

The numbers of sheep in the several States and Territories for each year from 1938 to 1943, are shown in the following table:—

SHEEP : NUMBER.

Year.	N.S.W.	Victoria.	Q'land.	S. Aust.	W. Aust.	Tasmania.	N.T.	A.C.T.	Total.
1938	51,563,181	18,863,467	22,407,970	8,904,402	8,732,076	2,520,950	26,856	263,616	113,372,518
1939	48,876,662	17,007,352	23,158,561	9,036,586	9,177,531	2,625,690	20,901	245,540	111,057,832
1940	54,372,477	18,251,870	24,100,031	9,940,570	9,574,433	2,677,120	38,887	180,408	119,305,301
1941	55,568,000	20,412,362	23,036,099	10,263,423	9,516,272	2,682,375	33,703	281,791	122,694,025
1942	56,737,000	20,598,201	25,196,245	10,245,894	9,722,780	2,398,201	28,245	262,563	125,189,129
1943	56,043,598	19,614,040	25,650,231	10,370,565	10,424,385	2,226,906	34,603	250,344	124,614,672

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.

The percentage distribution in 1943 was :—New South Wales, 44.97; Victoria, 15.74; Queensland, 20.58; South Australia, 8.32; Western Australia, 8.37; Tasmania, 1.79; Northern Territory, 0.03; Australian Capital Territory, 0.20 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 111 million, followed by the U.S.S.R. (Russia) with 85 million, the United States of America with 54 million, the Argentina with 44 million and India (British and Native), 42 million. On account of drought the number of sheep in the Union of South Africa declined from 46 million in 1933 to 36 million in 1935, but the number had increased to 41 million in 1938. In the Argentina sheep flocks also declined from 44.4 million in 1930 to 38 million in 1935, but the number recorded in 1937 was 44 million. During the years 1925 to 1929 the sheep flocks of the U.S.S.R. exceeded those of Australia. The maximum number recorded was 130 million in 1928, but after that year a remarkable decline took place and the number depastured in 1934 was only 46,848,000. It was proposed under the second Five Year Plan to increase the number to 85 million by 1937, but this number was only approximately reached by 1938. Russian sheep are mainly coarse-wooled, and the wool is of inferior quality, but the Soviet Government is making efforts to improve it. In a classification of the wool production in 1934, 10 per cent. was classed as fine wool, 16 per cent. as semi-fine quality, and 74 per cent. as coarse wool. In 1938 the production of fine wool had increased to 14 per cent. and semi-fine to 39 per cent., while the proportion of coarse wool had declined to 47 per cent. Production of wool in the U.S.S.R. amounted to about 303 million lb. during 1938, representing an average weight of fleece shorn of more than 3 lb.

SHEEP : NUMBER IN VARIOUS COUNTRIES.

Country.	Year.	No. of Sheep (,000 omitted).	Country.	Year.	No. of Sheep (,000 omitted).
Australia ..	1939	111,058	Italy ..	1938	9,467
U.S.S.R. (Russia) ..	1938	84,500	Bulgaria ..	1934	8,840
U.S.A. ..	1938	53,762	Greece ..	1937	8,451
Argentina ..	1937	43,740	Algeria ..	1937	5,965
India (British and Native) ..	1936	42,060	Chile ..	1936	5,749
Union of South Africa ..	1938	41,150	Germany ..	1938	5,677
New Zealand ..	1938	32,379	Iraq ..	1938	5,514
United Kingdom ..	1938	26,775	Bolivia ..	1931	5,232
China ..	1935	20,957	Mexico ..	1930	3,674
Spain ..	1933	19,093	Canada ..	1938	3,415
Uruguay ..	1932	17,931	Poland ..	1938	3,411
Turkey ..	1937	16,449	Tunis ..	1937	3,383
Iran ..	1936	13,615	Portugal ..	1934	3,274
Brazil ..	1935	12,645	Kenya ..	1930	3,243
Rumania ..	1937	12,372	Eire ..	1938	3,197
Peru ..	1929	11,209	Somaliland ..	1938	3,000
French Equatorial and West Africa ..	1937	11,014	Sudan (Anglo-Egyptian) ..	1938	2,500
French Morocco ..	1938	10,162	Syria and Lebanon ..	1938	2,129
Yugoslavia ..	1938	10,137	Manchuria ..	1937	1,966
France ..	1938	9,872	Nigeria ..	1938	1,796
			Tanganyika Territory ..	1937	1,646

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 Western Australia. On 27th November, 1929, the export of stud sheep was prohibited, except with the approval of the Minister for Trade and Customs. Stud sheep, however, were being exported in increasing numbers up to the outbreak of war in the Pacific, and shipments in 1939-40 amounted to 23,329 sheep valued at £79,955 compared with 115 valued at £2,591 in 1942-43. The chief countries to which sheep were consigned in 1939-40 were New Zealand, South Africa, Japan and Korea. The ordinary flock sheep exported from Australia were, for the most part, consigned to Malaya and the Pacific Islands. The following table shows the imports and exports of stud and flock sheep for the years 1938-39 to 1942-43 :—

SHEEP : IMPORTS AND EXPORTS, AUSTRALIA.

Year.	Imports.		Exports.		Net Exports.	
	No.	Value.	No.	Value.	No.	Value.
		£A.		£A.		£A.
1938-39 ..	5,288	44,961	72,027	84,366	66,739	39,405
1939-40 ..	6,990	54,088	79,375	112,596	72,385	58,508
1940-41 ..	1,944	12,678	88,209	99,550	86,265	86,872
1941-42 ..	311	4,931	65,061	54,211	64,750	49,280
1942-43 ..	158	2,826	5,265	9,095	5,107	6,269

6. **Sheep Slaughtered.**—The number of sheep slaughtered in the several States during each of the years from 1938 to 1942 were as follows :—

SHEEP (INCLUDING LAMBS) SLAUGHTERED.

Year.	N.S.W. (a)	Victoria. (b)	Q'land.	S. Aust.	W. Aust.	Tas. (b)	N.T.	A.C.T. (b)	Total.
1938..	6,322,338	7,727,774	1,120,783	2,007,312	1,318,249	376,583	250	26,222	18,899,511
1939..	6,900,294	6,990,746	1,232,477	2,094,202	1,301,418	460,957	360	25,748	19,006,202
1940..	8,167,695	8,373,177	1,274,584	2,104,288	1,331,580	477,475	2,126	30,993	21,821,918
1941..	8,128,461	8,634,609	1,499,315	2,070,490	1,333,294	532,087	2,000	38,011	22,258,267
1942..	9,279,729	9,730,820	2,588,650	2,296,659	1,530,793	602,949	2,000	41,668	25,573,263

(a) Year ended 31st March, year following.

(b) Year ended 30th June, year following.

7. **Production and Consumption of Mutton and Lamb.**—The production of mutton and lamb during 1942-43 amounted to 940,622,000 lb., of which 713,840,000 lb. or 76 per cent. was consumed locally, leaving a balance of 226,782,000 lb. or 24 per cent. for exportation. (See also § 1 par. 10.)

8. **Exports of Frozen Mutton and Lamb.**—The export trade in mutton and lamb preserved by cold process expanded rapidly to 1913 when 205 million lb. were shipped. Progress was interrupted during the War of 1914-19, and probably owing to high wool prices the exports of mutton and lamb for a number of years after that war were considerably less than earlier shipments. Exports commenced to rise again in 1929-30, and from that year onwards they have continued to expand almost uninterruptedly. Formerly the shipments consisted largely of frozen mutton, but in 1923-24 lamb supplanted mutton, and the exports of lamb have been responsible for the increase in shipments of mutton and lamb during the past ten years.

The quantity and value of the shipments of mutton and lamb during each of the five years ended 1942-43 were as follows :—Lamb, 1938-39, 158,332,714 lb., £4,393,773 ;

1939-40, 201,039,375 lb., £5,353,874; 1940-41, 219,954,539 lb., £5,864,519; 1941-42, 164,300,962 lb., £4,498,081; and 1942-43, 184,240,389 lb., £5,182,558. Mutton, 1938-39, 28,155,757 lb., £413,693; 1939-40, 47,627,848 lb., £728,510; 1940-41, 18,970,895 lb., £277,964; 1941-42, 10,638,918 lb., £172,712; 1942-43, 19,441,131 lb., £313,328.

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 1942-43.

9. **War-time Contract.**—The Government of the United Kingdom has contracted to purchase Australian mutton and lamb. Particulars will be found in Chapter XXVII. "Miscellaneous".

10. **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. 9.)

11. **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 1939 are given in the following table. Particulars for later years are not available.

IMPORTS OF FROZEN MUTTON AND LAMB INTO THE UNITED KINGDOM.

Country of Origin.	1935.	1936.	1937.	1938.	1939.
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MUTTON—QUANTITY.

	Cwt.	Cwt.	Cwt.	Cwt.	Cwt.
Chile	89,326	95,759	94,201	96,594	58,790
Uruguay	6,232	8,240	16,553	23,713	11,893
Argentina	150,423	121,908	110,907	98,884	104,664
Other Foreign Countries	2,870	2,063	4,871	1,424	1,846
Total, Foreign	248,851	227,970	226,532	220,615	177,193
Australia	424,050	227,097	405,929	367,044	322,908
New Zealand	1,041,563	888,864	862,182	1,014,652	815,912
Other British Countries .. .. .	..	350	4,582	2,605	18,620
Total, British	1,465,613	1,116,311	1,272,693	1,384,301	1,157,440
Grand Total	1,714,464	1,344,281	1,499,225	1,604,916	1,334,633

MUTTON—VALUE.

	£	£	£	£	£
Chile	129,856	177,128	163,122	166,009	100,978
Uruguay	10,635	13,945	28,128	43,859	20,527
Argentina	223,070	219,406	202,384	192,254	185,299
Other Foreign Countries	3,984	3,204	8,762	2,500	3,175
Total, Foreign	367,545	413,683	402,396	404,622	309,979
Australia	693,878	421,720	727,408	622,648	490,512
New Zealand	1,754,720	1,616,742	1,638,107	1,779,019	1,291,327
Other British Countries .. .. .	..	613	8,482	4,194	37,242
Total, British	2,448,598	2,039,075	2,373,997	2,405,861	1,819,081
Grand Total	2,816,143	2,452,758	2,776,393	2,810,483	2,129,060

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

Country of Origin.	1935.	1936.	1937.	1938.	1939.
LAMB—QUANTITY.					
	Cwt.	Cwt.	Cwt.	Cwt.	Cwt.
Chile	118,554	111,209	115,682	99,199	137,256
Uruguay	130,176	118,055	148,876	147,637	165,215
Argentina	754,827	777,996	778,943	794,712	817,656
Other Foreign Countries ..	28,561	37,230	38,006	42,947	32,048
Total, Foreign ..	1,032,118	1,044,490	1,081,507	1,084,495	1,152,175
Australia	1,360,158	1,268,909	1,476,615	1,531,232	1,305,702
New Zealand	2,591,399	2,641,494	2,740,202	2,660,882	2,736,479
Other British Countries ..	18	558	4,174	7,312	5,759
Total, British ..	3,951,575	3,910,961	4,220,991	4,199,426	4,047,940
Grand Total ..	4,983,693	4,955,451	5,302,498	5,283,921	5,200,115
LAMB—VALUE.					
	£	£	£	£	£
Chile	271,858	316,386	312,972	287,386	350,924
Uruguay	327,257	316,870	419,409	411,710	442,169
Argentina	1,898,688	2,091,387	2,179,470	2,250,955	2,203,637
Other Foreign Countries ..	77,642	101,194	108,090	113,239	87,004
Total, Foreign ..	2,575,445	2,825,837	3,020,001	3,063,290	3,083,734
Australia	3,934,693	3,698,058	4,349,418	4,571,384	3,647,984
New Zealand	8,063,996	8,264,409	8,753,793	8,743,507	8,441,400
Other British Countries ..	51	1,529	11,704	17,831	16,673
Total, British ..	11,998,740	11,963,996	13,114,915	13,332,722	12,106,057
Grand Total ..	14,574,185	14,789,833	16,134,916	16,396,012	15,189,791

§ 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 13 per cent. of the total production in 1942-43.

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	1938-39	111.1	984
United States of America	1938-39	53.7	458
Argentina	1937-38	43.7	389
New Zealand	1938-39	32.4	329
U.S.S.R. (Russia)	1938-39	84.5	303
Union of South Africa	1938-39	41.2	264

2. **Greasy and Scoured Wool.**—Whether the weight of the wool clip should be stated as “in the grease” or as “scoured and washed” is a matter which seriously affects comparisons between the clips of different seasons and of different countries. The quantity of grease and other extraneous matter in a fleece differs, not only between countries, but between districts in the same country. It fluctuates with the vagaries of the season, and 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 and washed.

A committee of experts in a report to the Central Wool Committee estimated in 1940 that the clean scoured wool content of the total production of Australia averaged between 51 and 53 per cent. of its greasy weight.

Wool scoured in Australia by wool-scouring works, however, yields only about 46 per cent. because the grade of greasy wool treated locally for export as scoured includes a large proportion of dirty and low-grade wool.

The quantity of scoured and washed Australian wool exported during the five years ended 1942-43 was approximately 15 per cent. of the total wool exports regarded as “greasy”.

3. **Production.**—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 skins exported. 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. 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 Australia. The gross value for 1939-40 to 1942-43 is based upon the average appraised value plus certain adjustments as computed by the State Statisticians.

WOOL : TOTAL PRODUCTION.

State.	1938-39.	1939-40.	1940-41.	1941-42.	1942-43.
	lb.	lb.	lb.	lb.	lb.
New South Wales(b)	439,049,939	548,505,998	539,035,404	549,203,170	499,443,158
Victoria	165,829,182	179,125,526	187,831,364	212,919,041	212,325,163
Queensland(c)	179,458,589	195,770,277	214,704,450	204,119,026	213,966,182
South Australia	102,888,121	105,265,869	106,646,992	105,124,013	108,637,004
Western Australia(c)	78,802,143	80,657,367	76,170,000	78,500,000	99,231,000
Tasmania	17,519,000	18,334,000	17,078,157	16,985,404	17,256,000
Northern Territory	(d)35,000	(d)35,000	308,128	308,000	308,000
Total—Quantity	983,581,974	1,127,694,037	1,141,774,495	1,167,158,654	1,151,166,507
Value..	£ 42,042,734	£ 61,759,180	£ 63,014,009	£ 64,701,719	£ 73,016,917

(a) Subject to revision.
previous December.

(b) Includes Australian Capital Territory.
(d) Approximate.

(c) For year ended

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 at the latest available date and shows the importance of Australia as a wool-producing country. Of a total production of 3,991 million lb. in 1938-39, Australia produced 984 million lb., or 24.7 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 1,849 million lb., or 46.3 per cent.

WOOL : WORLD'S PRODUCTION.

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

Countries.	Average Five Years 1909-13.	1934-35.	1935-36.	1936-37.	1937-38.	1938-39.
Australia	741.4	1,015.4	971.1	982.8	1,023.4	983.6
U.S.A.	314.1	451.0	452.7	448.6	454.6	457.7
Argentina	358.7	370.0	359.0	379.0	380.0	394.0
New Zealand	198.5	265.0	304.0	303.5	297.0	329.0
U.S.S.R. (Russia)	380.0	128.0	158.4	202.1	259.0	303.0
Union of South Africa	165.9	219.0	250.0	277.0	246.0	264.0
Uruguay	157.0	112.0	110.0	114.0	110.0	114.0
China (a)	100.0	110.0	110.0	110.0	110.0	110.0
United Kingdom	134.0	115.0	109.0	108.0	107.0	110.0
India (a)	100.0	100.0	100.0	100.0	100.0	100.0
Turkey	118.0	35.4	41.1	48.9	64.5	69.0
Spain	72.0	73.0	66.0	66.0	60.0	60.0
France	80.7	52.8	52.7	53.9	55.1	54.4
Rumania	13.2	43.0	42.9	42.9	45.0	48.5
Morocco (French)	14.9	35.6	40.8	40.7	47.8	44.7
Germany	52.0	32.2	36.3	40.1	43.3	44.5
Brazil	35.0	36.4	37.5	37.5	43.2	(a)43.0
Iran	12.1	40.0	37.5	37.5	35.3	40.0
Yugoslavia	25.4	31.0	32.2	33.6	31.5	35.5
Chile	17.4	37.0	35.2	35.7	36.0	33.0
Italy	55.0	36.0	30.0	30.0	30.0	33.0
Bulgaria	23.7	21.3	21.1	20.4	20.7	21.2
Canada	11.2	19.5	19.4	18.9	19.0	18.8
Eire .. ..	..	17.0	16.5	17.6	16.4	17.9
Algeria	35.2	15.2	16.1	17.6	17.2	16.4
Basutoland .. ..	..	5.1	7.3	6.0	4.7	6.9
Falkland Islands .. ..	..	4.0	4.2	4.0	4.6	3.6
Other Countries	71.2	201.4	214.0	222.3	215.9	234.8
Total	3,286.6	3,621.3	3,675.0	3,798.6	3,877.2	3,990.5

(a) Estimated.

6. **War-time Contracts.**—(i) *Wool.* After the outbreak of war in September, 1939, negotiations were concluded between the Governments of the Commonwealth and of the United Kingdom whereby the latter contracted to purchase the entire wool clip of Australia for the duration of the War and one full clip thereafter. The price per lb. at store in Australia was fixed at 10½d. sterling, or 13.4375d. in Australian currency for the 1939-40 to 1941-42 clips. For the 1942-43 and later clips the United Kingdom

Government increased the price by 15 per cent., thus bringing the price to 15.453125d. Australian currency, and provision was made for an equal division between the two Governments of any profits derived from the sale of the wool for use outside the United Kingdom. In addition, an amount not exceeding ¾d. sterling or ¾d. (Aust.) will be paid by the United Kingdom Government to cover all costs from store at port of oversea shipment to ship. The agreement provides that sufficient quantities of wool shall be retained in Australia for domestic use. The administration of the scheme in Australia is controlled by the Central Wool Committee assisted by a Committee in each State. These Committees consist of representatives of growers, brokers, buyers and manufacturers.

Separate agreements have been negotiated by the Governments of the United Kingdom, Union of South Africa and New Zealand.

(ii) *Sheepskins*. Under the contract negotiated in April, 1940, between the Governments of the Commonwealth and of the United Kingdom, the latter agreed to purchase the exportable surplus of Australian woolled sheepskins. The scheme, which is for the same period as the wool contract, is administered by the Central Wool Committee. The exportable surplus is determined by competition in the open market between fellmongers and export packers licensed by the Central Wool Committee. The quantity appraised during the period of operation for the season 1942-43 amounted to 7,794,507 skins with an appraised value of £1,692,955.

Further particulars of these contracts appear in Chapter XXVII. "Miscellaneous".

7. *Wool Appraisements*.—Details of the quantity and value of wool appraised by the Central Wool Committee during 1939-40 to 1942-43 are given in the following table. The quantities include the production for the years shown plus any unappraised wools carried forward.

WOOL APPRAISEMENTS : AUSTRALIA.

Year ended June—	Greasy.		Scoured.		Total Appraised Value.	Average Value per lb. Greasy.
	Quantity.	Appraised Value.	Quantity.	Appraised Value.		
	lb.	£	lb.	£	£	d.
1940 (a)	1,066,236,666	55,880,334	45,828,781	3,961,945	59,842,279	12.403
1941 ..	990,833,406	50,519,740	53,205,679	4,731,411	55,251,151	12.085
1942 ..	1,034,617,098	53,681,110	55,853,496	4,790,795	58,471,905	12.242
1943 ..	1,048,049,364	61,686,427	51,369,110	4,990,608	66,677,035	13.906

(a) Period September, 1939—June, 1940.

8. *Consumption of Locally Processed Wool*.—It is impossible to obtain particulars of the total consumption of wool in Australia, as considerable quantities of manufactured woollen goods 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 blankets, rugs and knitted-wear. Some difficulties arise in the aggregation of returns from individual mills concerned with only one process in manufacture and whose output constitutes the raw material of other mills, but the risk of duplication has been reduced to a minimum. Reference is made to the woollen mills established in Australia in Chapter XIX. "Manufacturing Industry".

The factors used to convert scoured wool and woollen yarn processed in Australia into their greasy equivalent are now computed from the data furnished by woollen mills. In 1939-40 these factors were :—1 lb. of worsted yarn was taken to equal 2.45 lb. of greasy while the greasy equivalent of 1 lb. of scoured wool was 1.94 lb.

In the following table particulars are given of the quantity of wool processed in Australian factories during each of the past ten years.

CONSUMPTION OF LOCALLY PROCESSED WOOL IN AUSTRALIA.

(In terms of greasy.)

Year.			Quantity.	Year.			Quantity.
			lb.				lb.
1933-34	..	..	60,881,494	1938-39	..	..	68,444,311
1934-35	..	..	55,753,478	1939-40	..	..	84,265,244
1935-36	..	..	70,205,840	1940-41	..	..	101,517,826
1936-37	..	..	71,579,920	1941-42	..	..	123,482,786
1937-38	..	..	68,377,043	1942-43	..	..	121,747,310

9. Exports of Wool.—(i) *Greasy—Quantities.* Of the total weight of greasy wool shipped overseas during the five years ended 1942-43, 42 per cent. was sent to the United Kingdom, compared with 38 per cent. dispatched during the years 1909 to 1913. The other leading consignees during the same period were United States of America, 45 per cent.; France, 6 per cent.; and Japan, 5 per cent. The following table shows the quantities of greasy wool exported, and the principal countries of recorded destination.

EXPORTS OF WOOL IN THE GREASE : AUSTRALIA.

Country to which Exported.	Average Five Years 1909-13.	1938-39.	1939-40.	1940-41.	1941-42.	1942-43.
		lb.	lb.	lb.	lb.	lb.
United Kingdom	212,004,088	333,263,937	539,690,858	146,331,337	198,764,867	173,255,776
Other British Countries	(a)	2,861,227	6,765,227	5,652,615	6,734,575	13,989,494
Belgium	55,143,706	104,147,161	10,436,368	..	..	..
France	149,835,946	162,034,076	153,310,149	..	..	..
Germany	106,344,696	35,027,760	4,461,767	..	..	..
Italy	4,381,197	21,186,890	3,018,449	..	..	..
Japan	7,262,683	72,659,411	50,611,467	58,100,837	11,324,899	..
Netherlands	(a)	15,701,733	5,341,198	..	..	..
Poland	(a)	6,954,917	466,805	..	..	..
United States of America	15,486,447	21,484,584	16,257,600	275,624,137	512,992,800	328,200,808
Other Foreign Countries	6,382,577	20,406,016	4,544,335	5,171,186	6,527,883	2,681,473
Total	356,841,340	795,727,712	794,904,223	490,880,112	736,345,024	518,127,551

(a) Included with Other Foreign Countries.

(ii) *Scoured and Washed including Tops, Noils and Waste—Quantities.* The exports of "scoured and washed" wool including tops, noils and waste during the period shown were as follows:—

EXPORTS OF WOOL—SCOURED AND WASHED, INCLUDING TOPS, NOILS AND WASTE : AUSTRALIA.

Country to which Exported.	Average Five Years 1909-13.	1938-39.	1939-40.	1940-41.	1941-42.	1942-43.
		lb.	lb.	lb.	lb.	lb.
United Kingdom	32,032,577	36,591,488	53,994,278	38,516,576	24,037,302	11,980,449
Canada	(a)	4,470,367	7,874,302	8,694,416	8,700,828	4,884,467
Other British Countries	(a)	1,156,535	2,595,559	3,965,218	6,969,753	6,096,509
Belgium	7,528,058	5,802,183	769,722	..	..	..
France	16,068,910	9,960,450	6,473,630	..	..	..
Germany	12,310,967	1,935,088	330,755	..	..	..
Italy	265,442	67,051	16,839	..	..	..
Japan	1,888,161	1,618,827	1,575,750	105,652	19,611	..
Poland	(a)	497,285	74,667	..	..	..
Other Foreign Countries	252,995	8,845,890	4,281,436	9,013,065	53,061,696	28,707,734
Total	70,347,110	70,945,164	77,986,938	60,354,927	92,789,190	51,669,159

(a) Included with Other Foreign Countries.

(iii) *Total Value of Exports.* The value of wool exported from Australia during the five years ended 1942-43 averaged 35 per cent. of the value of the exports of merchandise of local origin, and during 1942-43 the proportion was 36 per cent. The value during the period under review together with the principal countries to which wool was exported is shown in the following table:—

VALUE OF WOOL EXPORTS : AUSTRALIA.

Country to which Exported.	Average Five Years 1909-13.	1938-39.	1939-40.	1940-41.	1941-42.	1942-43.
	£A.	£A.	£A.	£A.	£A.	£A.
United Kingdom ..	10,608,967	18,513,175	38,703,877	13,527,483	15,399,458	13,593,272
Other British Countries ..	(a)	675,143	1,715,647	2,189,392	2,636,965	2,898,651
Belgium ..	2,546,915	4,720,537	594,395	..	..	..
France ..	6,494,832	7,566,458	10,135,008	..	..	..
Germany ..	5,131,282	1,994,320	244,540	..	..	..
Italy ..	202,434	1,175,304	174,384	..	..	..
Japan ..	516,528	3,804,120	3,196,178	3,918,906	737,464	..
Netherlands ..	(a)	826,198	265,014	..	..	..
Poland ..	(a)	403,446	27,077	..	..	..
United States of America ..	795,328	1,346,187	1,153,378	19,060,182	38,193,388	27,141,701
Other Foreign Countries ..	296,356	1,712,208	693,346	949,573	1,073,838	684,564
Total ..	26,592,642	42,737,096	56,902,844	39,645,536	58,041,113	44,318,188

(a) Included with Other Foreign Countries.

10. *Exports and Local Sales of Wool.*—Approximately 90 per cent. of Australian wool is normally disposed of locally. Under pre-war conditions buyers from the United Kingdom, France, Belgium, Germany and other European countries, and from America, Japan, China and India attended 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 Bulletin*, Part II., issued by this Bureau.

11. *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. During the ten years ended 1938-39, the price of greasy wool sold in the selling centres of Australia averaged 11½d. per lb. compared with 13.68d. per lb. for the ten years ended 1942-43. This figure may be compared with an average of 18d. per lb. during the nine post-war years ended 1928-29, and 9d. per lb. for the seven pre-war years ended 1913-14. The heavy decline in the price of wool which commenced in 1929-30 continued during the succeeding three 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. A decline in 1934-35 was succeeded by a period of rising prices in the two years following, but in 1937-38 and in 1938-39 prices again receded.

As mentioned in paragraph 6 above, the price of wool is now determined by the British Government wool contract. The price as fixed for the years 1939-40 to 1941-42, was 13.4375d. per lb., and for the year 1942-43 the price was 15.45d. per lb.

The effect of fluctuating wool values upon the national income is reflected in the following figures. Based upon appraisement in each State plus certain adjustments as recorded by the State Statisticians, the gross value of the wool clip for Australia for 1941-42 amounted to £64,702,000 compared with £42,043,000 realized during 1938-39 under open market conditions. These values may be compared with £81,430,000 in 1924-25 when the record price was realized, and £34,804,000 in the year 1930-31.

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.	1938-39.	1939-40.	1940-41.	1941-42.	1942-43.
	<i>d.</i>	<i>d.</i>	<i>d.</i>	<i>d.</i>	<i>d.</i>
Greasy (a)	10.39	(b)13.44	(b)13.44	(b)13.44	(c)15.45

(a) National Council of Wool-selling Brokers. (b) The equivalent of the contract price of 10½d. sterling. (c) The equivalent of the contract price of 12.34d. sterling.

Measured in terms of Australian, sterling and gold currencies the approximate values of greasy wool per lb. since 1933-34 were as follows :—

GREASY WOOL : AVERAGE VALUES PER LB.

Year.	Australian Currency.	Sterling.	Gold Prices.
	<i>d.</i>	<i>d.</i>	<i>d.</i>
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
1937-38	12.51	9.99	6.15
1938-39	10.39	8.30	4.84
1939-40	13.44	10.75	5.37
1940-41	13.44	10.75	5.34
1941-42	13.44	10.75	5.34
1942-43	15.45	12.34	6.14

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 rates of exchange between the months of September and June in each year. Though not exact these results will suffice for general purposes.

12. United Kingdom Importation of Wool.—The appended statement of the quantities and values of wool imported into the United Kingdom during 1939 from the principal wool-producing countries shows the important position which Australia occupies in the supply of wool to the Mother Country. Particulars for later years are not available.

WOOL (a) : IMPORTS INTO UNITED KINGDOM, 1939.

Country of Origin.	Quantity.	Value.	Country of Origin.	Quantity.	Value.
	lb.	£		lb.	£
Australia ..	355,078,400	16,734,633	Other British Possessions	3,043,500	108,765
New Zealand ..	223,794,300	9,573,230	Peru ..	1,487,700	75,412
Argentina ..	112,401,500	3,980,130	Belgium ..	4,560,000	303,471
Union of South Africa ..	85,130,000	3,054,049	Falkland Islands	3,116,300	119,058
India ..	48,136,800	1,748,059	Germany ..	301,500	11,315
France ..	25,735,900	1,393,451	U.S.A. ..	414,900	16,465
Uruguay ..	11,926,500	540,552	Other Countries	5,243,500	193,973
Chile ..	11,564,800	481,492			
Eire ..	8,622,000	341,983	Total ..	900,557,600	38,676,038

(a) Greasy and Scoured.

Of the importations of wool into the United Kingdom during 1939, Australian wool represented 40 per cent. of quantity and 43 per cent. of value, and New Zealand 25 per cent. of quantity and 25 per cent. of value. Altogether, 726,921,300 lb., valued at £31,679,777, were received from British Possessions, these figures being equivalent to 81 per cent. of the total weight and 82 per cent. of the total value of all wool imported.

13. **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 for 1938, together with the chief sources of supply. The quantities imported refer to the actual weight of wool without distinguishing between greasy and scoured. They also exclude any wool imported on skins. Later details are not available.

WOOL: PRINCIPAL IMPORTING COUNTRIES AND SOURCES OF SUPPLY, 1938.

(In millions of lb.)

Importing Country.	Production(a) of Importing Country.	Quantity imported from—					Total Imports.
		Australia.	Union of South Africa.	Argentina.	New Zealand.	Other Countries.	
United Kingdom ..	110.0	365	107	79	198	132	881
Belgium ..	0.7	106	19	20	7	65	217
Czechoslovakia ..	2.0	18	4	6	..	1	29
France ..	54.4	168	52	62	22	86	390
Germany ..	44.5	49	90	56	14	97	306
Italy ..	33.0	19	22	12	..	23	76
Japan ..	..	87	5	6	11	8	117
Poland ..	12.9	14	2	14	4	..	34
U.S.A. ..	457.7	7	1	47	4	44	103
Total ..	..	833	302	302	260	456	2,153

(a) As in the grease.

As a considerable transit trade exists between continental countries, it must not be assumed that the whole of the imports recorded by these countries are retained for their own consumption. The countries chiefly concerned with the transit trade are United Kingdom, Belgium, and France. The quantities re-exported during 1938 were:—United Kingdom, 269 million lb., or 30 per cent., of the total imports; Belgium, 76 million lb., or 35 per cent.; and France, 49 million lb., or 13 per cent.

14. **Inquiry into Wool Industry.**—A Committee was appointed by the Commonwealth Government on 15th August, 1932, to inquire into and report on the condition of the Australian wool industry. The report of the Committee was presented on 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, p. 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 ended 1942-43 amounted to £22,079,093, or an average of £4,415,819 per annum.

2. **Sheepskins with Wool.**—The exports of sheepskins with wool aggregating £8,254,009 during the last five years constitute an important item in the values referred to in the preceding paragraph, although the largest export in the last quinquennium was that of rabbit skins valued at £8,902,957. During 1938-39 France was the largest purchaser, taking 74 per cent. of the total consignments, while the United Kingdom ranked next with 15 per cent., followed by Germany with 7 per cent. The exports of sheepskins with wool during each of the years from 1938-39 to 1942-43 were as follows :—

EXPORTS OF SHEEPSKINS WITH WOOL : AUSTRALIA.

Particulars.	1938-39.	1939-40.	1940-41.	1941-42.	1942-43.
Number ..	12,625,200	9,242,953	3,267,519	8,442,352	4,616,761
Value .. £A.	2,301,800	2,267,779	850,070	1,755,419	1,078,941

3. **Sheepskins without Wool.**—Sheepskins without wool are exported chiefly to the United States of America. During 1942-43 this country accounted for 97 per cent. of the total shipments while the remaining 3 per cent. was exported to the United Kingdom. Quantities and values for the last five years are given in the table hereunder :—

EXPORTS OF SHEEPSKINS WITHOUT WOOL : AUSTRALIA.

Particulars.	1938-39.	1939-40.	1940-41.	1941-42.	1942-43.
Number ..	1,075,895	1,463,610	2,013,651	4,922,932	3,642,179
Value .. £A.	68,152	101,027	127,666	385,194	307,477

4. **Hides.**—(i) *Exports.* The export trade in cattle hides during 1942-43 was distributed as follows :—United Kingdom, £10,255; Canada, £1,150; United States of America, £40,151.

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

EXPORTS OF CATTLE HIDES : AUSTRALIA.

Particulars.	1938-39.	1939-40.	1940-41.	1941-42.	1942-43.
Number ..	1,186,543	559,490	496,415	96,672	72,526
Value .. £A.	896,752	579,640	438,648	89,715	49,156

Calfskins exported during the five years ended 1942-43 numbered 1,386,533 valued at £269,589. The annual export of horse hides is very small, and for the past five years numbered 35,571 hides valued at £24,602.

(ii) *Imports.* The imports of cattle hides and calfskins are fairly large, the chief source of supply being New Zealand, and small quantities are obtained from the Pacific Islands, France and Italy. The quantities and values of cattle hides, including calfskins, imported into Australia during the years 1938-39 to 1942-43 were as follows:—

IMPORTS OF CATTLE HIDES : AUSTRALIA.

Particulars.		1938-39.	1939-40.	1940-41.	1941-42.	1942-43.
Quantity	cwt.	80,641	24,985	26,672	40,604	73,673
Value	£A.	280,273	88,667	88,370	193,368	316,255

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

EXPORTS OF OTHER SKINS : AUSTRALIA.

Description.	1938-39.	1939-40.	1940-41.	1941-42.	1942-43.
	£A.	£A.	£A.	£A.	£A.
Rabbit and Hare	429,140	(a) 911,384	(a) 2,207,591	(a) 3,368,644	(a) 1,986,198
Opossum ..	16,040	9,110	82,738	45,005	13,638
Kangaroo ..	169,078	155,921	238,564	165,111	158,236
Fox ..	27,767	39,190	76,341	131,338	89,946
Wallaby ..	9,640	16,903	13,627	13,347	13,462
Other ..	25,912	25,010	17,863	18,828	11,894
Total ..	677,577	1,157,518	2,636,724	3,742,273	2,273,374

(a) Rabbit skins only.

These skins were shipped principally to the United States of America and the United Kingdom, and the values taken by each during 1942-43 were as follows:—

OTHER SKINS : EXPORTS TO UNITED STATES AND UNITED KINGDOM, 1942-43.

Description.				United States of America.	United Kingdom.
				£A.	£A.
Rabbit ..	..	..	..	1,876,782	6,909
Opossum ..	..	..	..	13,638	..
Kangaroo ..	..	..	..	158,198	..
Fox ..	..	..	..	89,621	..
Wallaby ..	..	..	..	7,613	130
Other ..	..	..	..	1,042	..
Total ..	..	..	..	2,146,894	7,039