

## CHAPTER XXIII.

## PASTORAL PRODUCTION.

NOTE.—Except where otherwise indicated, values of Australian oversea trade shown throughout this chapter are expressed as f.o.b., Australian currency, port of shipment.

## § 1. Initiation and Growth of the Pastoral Industry.

1. **Livestock Numbers.**—A detailed account of the various enumerations of livestock in Australia made prior to 1860 was given in previous issues of the Year Book. Since 1860, annual enumerations have been made, based, with few exceptions, on actual collections made through the agency of the State police or by post. Particulars concerning the numbers of each of the principal kinds of livestock in Australia at decennial intervals from 1860 to 1950, and from 1955 onwards in single years, are given in the following table, and are shown continuously on the graph on page 957.

**LIVESTOCK : AUSTRALIA.**  
(‘000.)

Year.	Horses.	Cattle.	Sheep.	Pigs.	Year.	Horses.	Cattle.	Sheep.	Pigs.
1860 ..	432	3,958	20,135	351	1940 ..	1,699	13,080	119,305	1,455
1870 ..	717	4,276	41,594	543	1950 ..	1,057	14,640	112,891	1,123
1880 ..	1,069	7,527	62,184	816	1955 ..	803	15,836	130,849	1,297
1890 ..	1,522	10,300	97,881	891	1956 ..	770	16,457	139,124	1,166
1900 ..	1,610	8,640	70,603	950	1957 ..	737	17,257	149,802	1,325
1910 ..	2,166	11,745	98,066	1,026	1958 ..	694	16,892	149,315	1,423
1920 ..	2,416	13,500	81,796	764	1959 ..	671	16,257	152,685	1,289
1930 ..	1,793	11,721	110,568	1,072					

While livestock numbers (particularly sheep) have increased substantially since 1860, marked fluctuations have 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, 1940–41 and 1944–45 to 1946–47.

The years in which the numbers of livestock attained their maxima are as follows:—Horses, 1918 (2,527,000); cattle, 1957 (17,257,000); sheep, 1959 (152,685,000); and pigs, 1941 (1,797,000).

The distribution throughout Australia of beef cattle, dairy cattle, sheep and pigs as at 31st March, 1955, is shown in the maps on pages 909–12 of Official Year Book No. 43.

The numbers of horses, beef cattle and sheep in each State and Territory are shown later in this chapter; similar information for dairy cattle and pigs appears in Chapter XXIV.—*Farmyard, Dairy and Bee Products.*

2. **Minor Classes of Livestock.**—Statistics of the minor classes of livestock (goats, camels, mules, donkeys, etc.) have not been collected in recent years. The last year in which all States, other than Victoria, collected this information was 1941, when total numbers 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. Further details have been published in earlier issues of the Official Year Book.

3. **Carrying Capacity of Pastoral Holdings.**—The carrying capacity of pastoral holdings has been increased in recent years, due in some measure to the succession of good seasons experienced since 1946 (with the exception of the 1957–58 season, when prevailing dry conditions caused a slight decline in cattle and sheep numbers). Other important factors contributing to the progressive increase over this period have been the increased attention to pasture improvement and the reduction of rabbit infestation.

There was a considerable decline in the rabbit population following the introduction of myxomatosis in 1950. This disease spread rapidly and the number of rabbits has been kept at a low level in recent years by the use also of poison baits, etc.

Statistics of the area under sown grasses and clovers which have been collected on a uniform basis in all States since 1952–53 reveal that the area sown has been considerably increased. In 1958–59, the area under sown grasses and clovers (excluding native grasses) totalled 34.1 million acres, an increase of 0.4 million acres (1 per cent.) over 1957–58 and 13.0 million acres (61 per cent.) over 1952–53. In recent years, the sowing and top-dressing of pastures has been facilitated by the increasing use of aircraft in these operations, an area of 1.3 million acres being sown and/or top-dressed in the year ended March, 1959.

4. **Value of Pastoral Production.**—(i) *Gross, Local and Net Values, 1958–59.* Values of pastoral production for each State are shown for 1958–59 in the following table. Further details of the source of the information and an explanation of the terms used in this compilation will be found in Chapter XXX.—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, 1958-59.**

(£'000.)

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	190,207	16,120	174,087	7,672	(b) 4,049	162,366
Victoria ..	134,015	14,231	119,784	3,665	5,727	110,392
Queensland ..	107,089	9,620	97,469	5,039	1,670	90,760
South Australia ..	49,568	3,319	46,249	3,431	4,393	38,425
Western Australia	40,820	3,218	37,602	2,992	4,028	30,582
Tasmania ..	11,044	722	10,322	2,776	894	6,652
Northern Territory	4,567	749	3,818	..	..	3,818
Aus. Cap. Territory	738	51	687	19	41	627
<b>Australia ..</b>	<b>538,048</b>	<b>48,030</b>	<b>490,018</b>	<b>25,594</b>	<b>20,802</b>	<b>443,622</b>

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

(b) No allowance has been made for costs of power, power kerosene, petrol and other oils.

(ii) *Net Values, 1954–55 to 1958–59.* The net value of pastoral production by States and the net value per head of population for the years 1954–55 to 1958–59 are shown below.

## NET VALUE OF PASTORAL PRODUCTION.(a)

Year.	N.S.W.(b)	Vic.	Q'land.	S. Aust.	W. Aust.	Tas.	Aust.(c)
NET VALUE. (£'000.)							
1954-55 ..	175,446	112,196	82,180	45,220	36,194	(b) 7,647	461,464
1955-56 ..	163,287	104,820	86,313	44,625	36,578	(b) 7,282	446,780
1956-57 ..	231,674	129,883	112,566	62,093	47,343	(b) 10,666	597,681
1957-58 ..	157,679	115,970	80,301	44,863	36,947	(b) 8,078	447,247
1958-59 ..	162,366	110,392	90,760	38,425	30,582	6,652	443,622

NET VALUE PER HEAD OF POPULATION.  
(£ s. d.)

1954-55 ..	50 14 4	45 1 10	62 0 1	56 0 0	55 15 6	524 8 8	50 15 4
1955-56 ..	46 6 7	40 17 4	63 16 3	53 9 6	54 13 6	522 16 3	47 19 2
1956-57 ..	64 11 4	49 3 11	81 10 10	72 1 9	69 3 3	532 14 1	62 13 8
1957-58 ..	43 2 1	42 16 9	57 4 6	50 12 9	52 17 10	524 3 7	45 17 10
1958-59 ..	43 11 6	39 15 5	63 12 11	42 6 1	42 18 9	19 9 10	44 11 5

(a) No deduction has been made for depreciation and maintenance. Excludes payments to wool-growers of profits from the war-time wool disposal plan. (b) No allowance has been made for costs of power, power kerosene, petrol and other oils. (c) Includes Northern Territory and Australian Capital Territory.

5. Indexes of Quantum and Price of Pastoral Production, 1954-55 to 1958-59.—The quantum indexes relate to gross output of farm products valued at constant prices. The quantities of each farm product produced each year have been re-valued at the unit gross value for the period 1936-37 to 1938-39. The price indexes relate to average "prices" of farm products realized in the principal markets of Australia. Average quantities of each product marketed in the period 1946-47 to 1950-51 have been used as fixed weights. For further details of the methods of calculating these indexes and of the weights used, see Chapter XXX.—Miscellaneous.

INDEXES OF QUANTUM(a) AND PRICE OF PASTORAL PRODUCTION:  
AUSTRALIA.

(Base: Average 3 years ended June, 1939 = 100.)

Particulars.	1954-55.	1955-56.	1956-57.	1957-58.	1958-59.
<i>Quantum(a) produced—</i>					
Wool .. .. .	132	146	164	148	164
Other products .. .. .	120	123	128	134	152
<i>Total Pastoral</i> .. .. .	127	136	148	142	159
Total per Head of Population .. .. .	96	100	106	100	109
<i>Price—</i>					
Wool .. .. .	540	468	607	473	370
Other products .. .. .	409	424	427	377	435
<i>Total Pastoral</i> .. .. .	489	451	536	435	396

(a) Index of value at constant prices, i.e., quantities revalued at average unit values of base years (1936-37 to 1938-39).

6. **Consumption of Meats.**—The quantity of meat (including cured and canned meat) in terms of carcass weight and edible offal available for consumption in Australia in 1958–59 was 1,087,581 tons. This is equivalent to 244.8 lb. per head of population compared with 244.6 lb. per head in 1957–58, and an average of 253.0 lb. during the years 1936–37 to 1938–39.

Although it is not easy to obtain strictly comparable particulars for other countries, it appears from data published by the Food and Agricultural Organization of the United Nations in its *Food Balance Sheets* that in recent years consumption of meat per head in Australia has been at approximately one and a half times the level of that in Canada and the United States of America.

7. **Marketing of Meat.**—(i) *General.* The Australian Meat Board, consisting of representatives of producers, processors, exporters and the Commonwealth Government, is responsible for the control of all exports of Australian meat and meat products. Further information on the powers, etc., conferred on the Board under the Meat Export Control Act 1935–1953 is given on page 801 of Official Year Book No. 40.

(ii) *United Kingdom Long-term Purchase Agreements.* Details of the long-term meat contracts with the United Kingdom Government from the outbreak of the 1939–45 War up to 30th June, 1952, and of the Fifteen Year Meat Agreement (1952–67) are given on page 710 of Official Year Book No. 41 and in earlier issues.

The Fifteen Year Meat Agreement (1952–67) between the United Kingdom and Australian Governments has as its objectives the promotion of meat production in Australia enabling increased exports to be made to the United Kingdom and the provision of a satisfactory market in the United Kingdom for such meat. It covers beef and veal, and mutton and lamb.

(iii) *Cessation of Bulk Purchasing.* Following the announcement in September, 1953, that the United Kingdom Ministry of Food would cease bulk purchasing of meat, arrangements were made between the Australian Meat Board and the Ministry for the reversion to private trading in the United Kingdom. The main features of the arrangements are:—

- (a) Mutton and lamb exported after 1st July, 1954, and beef, veal and pigmeat exported after 1st October, 1954, direct to United Kingdom importers are to be sold on the open market under methods similar to those which applied pre-war.
- (b) The following minimum prices (f.o.b. port of shipment), to operate until 30th September, 1955, were agreed upon:—Beef and veal, 13.18d. stg. per lb.; lamb, 13.61d. stg. per lb.; and mutton, 6.05d. stg. per lb. The minimum prices are to be reviewed for subsequent years.
- (c) In the event of market prices for the various classifications of meat averaging below the minimum, the Ministry is to make a payment to the Australian Government corresponding to the amount of the deficiency. So as to determine the extent of any deficiency, a procedure designed to measure as accurately as possible the weighted average level of wholesale prices of Australian meat on the United Kingdom market has been agreed upon.

(iv) *Private Trading.* After eight months of open trading, the Board estimated that a deficiency payment would be received in respect of beef for the first year. In order to make arrangements for this anticipated deficiency to be passed on to the producer, the Meat Agreement (Deficiency Payments) Act was passed by the Commonwealth Government in May, 1955. Payments were to be made on the understanding that they were, or would be, reflected in the price paid to producers.

To make provision for recoupment by the Board of any overpayment, the Meat Export (Additional Charge) Act was also passed in May, 1955.

Negotiations were made in Australia during August and September, 1955, to review minimum prices and the working of the Agreement generally. The following minimum prices were fixed for the three years ended 30th September, 1958:—For beef and veal and lamb the same as for the year ended 30th September, 1955, and for mutton the average prices realized to the end of April, 1955 (approximately 5.8d. stg. per lb.). In addition, minimum beef and veal prices were fixed for the three years 1958–61 at 5 per cent. below those for the 1955–58 period. Australia was entitled to export a free quota of 10,000 tons of beef, veal, lamb and mutton to destinations other than the United Kingdom and the

Colonies. Under the terms of the Agreement, provision was made for additional free quotas to be requested should depressed prices or other circumstances justify an approach of this kind. Under this arrangement, for the year ended 30th September, 1956, an additional 5,000 tons of beef for export to any destination was agreed upon.

In July and August, 1956, the annual review of the operation of the Agreement took place in London. It was agreed that Australia should be entitled to export 15,000 tons of beef, veal, mutton and lamb to destinations other than the United Kingdom and Colonies during each of the meat years 1956-57 and 1957-58.

Because of a rise in beef prices in the United Kingdom, the deficiency payments made by the Board during the year ended 30th September, 1955, exceeded the sum received from the United Kingdom for the same period. In an endeavour to recoup some of this overpayment, under the terms of the Meat Export (Additional Charge) Act, a levy of one-eighth of a penny per lb. was imposed on certain classes of beef exported to the United Kingdom out of stocks placed into store from 1st February to 16th April, 1956.

From 1st October, 1955, until April, 1958, beef prices in the United Kingdom were consistently below the level of the guarantee and consequently Australia "earned" deficiency payments as follows:—

Year.	Amount.
1954-55 .. .. .	£150,000
1955-56 .. .. .	£3,250,000
1956-57 .. .. .	£5,930,000

No deficiency payments were received in 1957-58 or 1958-59.

The receipt of these moneys enabled the Australian Meat Board to make substantial bounty payments on beef exported to the United Kingdom. The rates of payment made during the 1954-55 and 1955-56 seasons are given on pages 888-9 of Official Year Book No. 43 and on pages 920-1 of Official Year Book No. 44 for 1956-57.

For 1958, a new "chiller" grade of export beef was introduced. Beef of the new grade, whether exported in the chilled or frozen form, received a bounty of 5d. per lb. The bounty on bone-out piece beef was increased from 4d. to 5d. per lb., and on certain classes of bone-in piece beef from 3d. to 5d. per lb. The basic rate of 3d. per lb. was maintained for other 1st and 2nd quality quarter beef. The bounty payments were discontinued on 27th December, 1958, on account of the relatively high prices being obtained in the United Kingdom.

Negotiations which commenced in June, 1958, with the United Kingdom Government resulted in agreement on the following points:—

- (1) Beef minimum prices for the seasons 1961-62 to 1963-64 will be the 1957-58 to 1960-61 level less 9 per cent.
- (2) Lamb minimum prices for the seasons 1957-58 to 1959-60 will be the 1954-55 to 1957-58 level less 5 per cent.
- (3) Minimum prices for mutton for the seasons 1957-58 to 1959-60 will be the 1954-55 to 1957-58 level less 15 per cent.
- (4) Beef export free quota for the seasons 1957-58 to 1960-61 will be a maximum of 7,500 tons a year of 1st and 2nd quality beef with no restriction as to the quantity of the lower grades that may be exported.

During the 1958-59 season, as in previous years, the heaviest volume of beef exported went to the United Kingdom. However, with the new free quota arrangements which operated from 1st October, 1958, Australian exporters were able to take advantage of the market for boneless manufacturing meat in the United States, and a substantial quantity of lower-grade beef, including drought-stricken stock, etc., which otherwise might not have been marketed at all, was disposed of to American manufacturers.

## § 2. Horses.

1. **Distribution throughout Australia.**—About 80 per cent. of the total number of horses in Australia are in the States of New South Wales, Queensland and Victoria. In the following table, figures are shown for each State and Territory for the years 1955 to 1959.

**HORSES: NUMBER.**  
(<sup>000.</sup>)

Year.	N.S.W.	Vic.	Q'land.	S. Aust.	W. Aust.	Tas.	N.T.	A.C.T.	Aust.
1955 ..	258	132	267	49	47	16	33	1	803
1956 ..	247	119	261	44	46	15	37	1	770
1957 ..	235	108	255	41	45	14	38	1	737
1958 ..	221	98	243	35	44	13	39	1	694
1959 ..	214	91	240	33	41	12	39	1	671

The number of horses in Australia reached its maximum during 1918, when a total of 2,527,149 was recorded. The United States of America recorded its highest number in the same year and Canada in 1921. The number in Australia has declined considerably since 1918 owing to the mechanization of transport and farming. During the period 1918 to 1959, the decrease in numbers has averaged 45,000 per annum.

A graph showing the number of horses in Australia from 1860 onwards appears on page 957.

The percentage distribution of the number of horses in each State and Territory for 1959 was:—New South Wales, 32; Victoria, 14; Queensland, 35; South Australia, 5; Western Australia, 6; Tasmania, 2; and Northern Territory, 6.

2. **Oversea Trade in Horses.**—(i) *Exports.* The export of horses from Australia during the early years of this century was fairly considerable, averaging about 15,000 head per annum between 1901 and 1920, exclusive of those used for war purposes during the 1914–18 War. Since then, exports have gradually declined and in 1958–59 amounted to only 349, valued at £222,223.

(ii) *Imports.* The few horses imported into Australia are mainly valuable stud animals from the United Kingdom and racehorses from New Zealand. The total number imported in 1958–59 was 391 valued at £432,207.

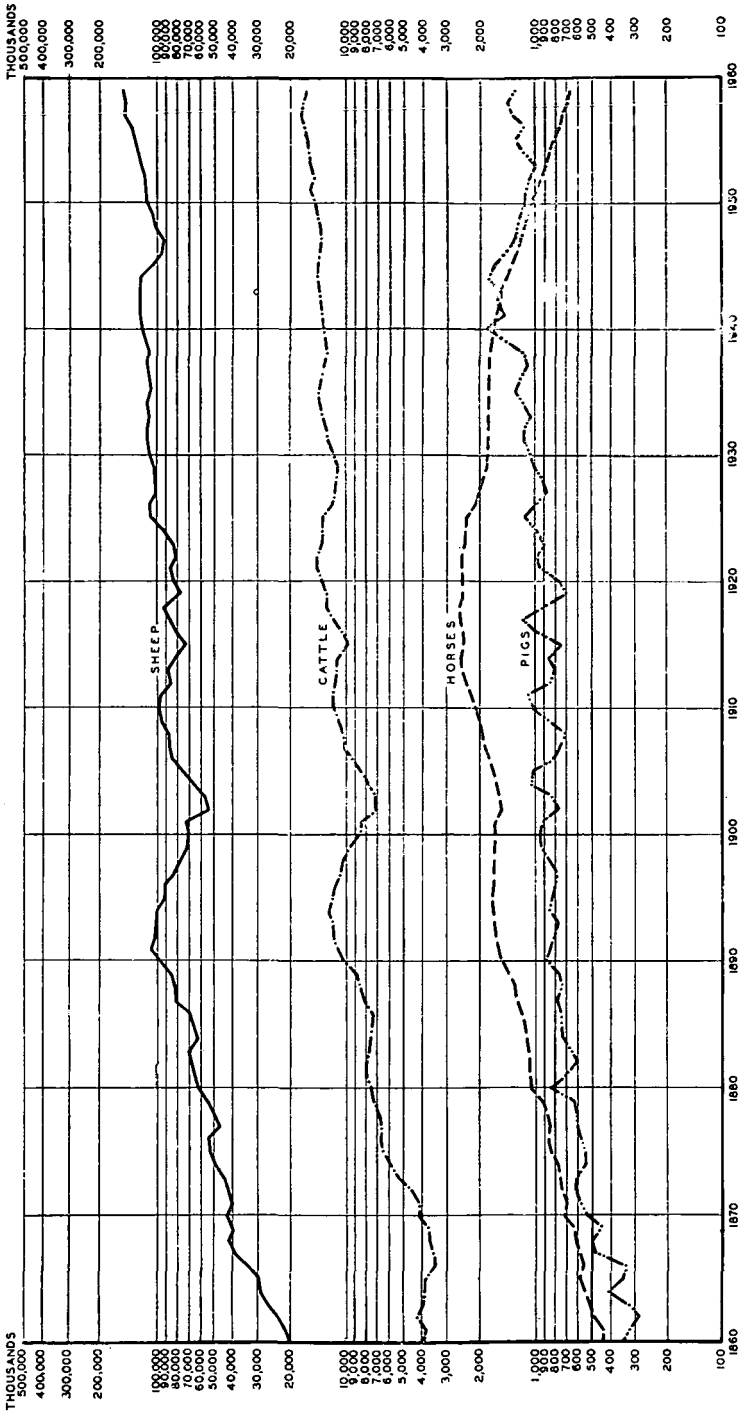
### § 3. Cattle.

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 the coastal districts of Victoria, New South Wales and southern Queensland in particular, the portion of Australia in the temperate zone which is best adapted to this industry. On the other hand, beef cattle are more widely distributed, particularly in the eastern States, and are raised in areas unsuitable for dairy cattle, such as the tropical area of northern Queensland, the Northern Territory, and 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 took 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 12,312,000 head were depastured. From 1895 onwards, however, the effects of droughts and the ravages of tick fever reduced the number to 7,063,000 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 up to 14,441,000 in 1921. Numbers fluctuated in succeeding years, but from 1947 to 1957 there was a general upward movement to a record level of 17,257,000 in the latter year. With the onset of very dry conditions in 1958, numbers declined slightly to 16,892,000 and continuing drought over large areas of Queensland and the Northern Territory was largely responsible for a further reduction to 16,257,000 in 1959. A graph showing the number of cattle in Australia from 1860 onwards appears on page. 957.

# LIVESTOCK : AUSTRALIA, 1860 to 1959

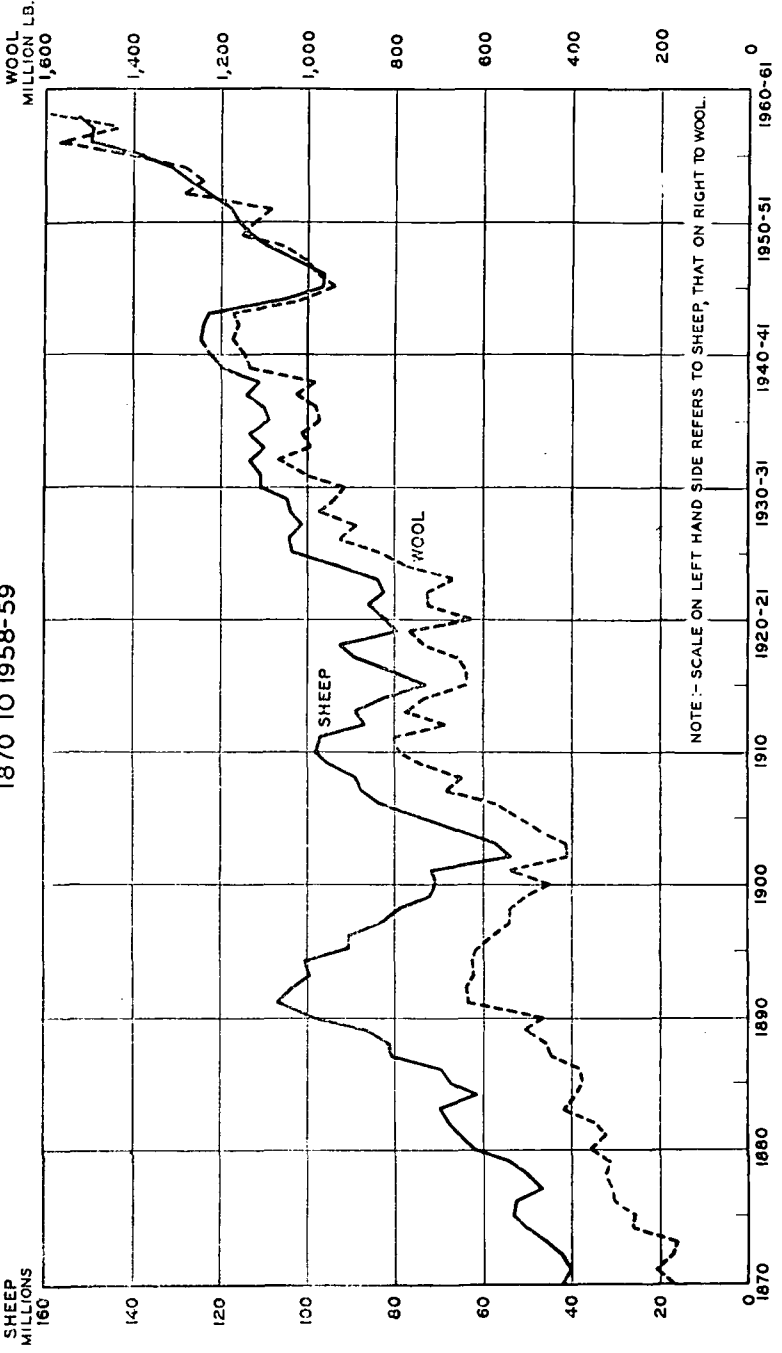
## RATIO GRAPH



NOTE:- VERTICAL SCALE IS LOGARITHMIC, AND THE CURVES RISE AND FALL ACCORDING TO RATE OF INCREASE OR DECREASE, ACTUAL NUMBERS ARE INDICATED BY SCALE.

# SHEEP NUMBERS AND WOOL PRODUCTION: AUSTRALIA

1870 TO 1958-59





The numbers of cattle (beef and dairy) in the several States and Territories in each year 1955 to 1959 are shown below.

**CATTLE: NUMBER.**  
(<sup>'000.</sup>)

Year.	N.S.W.	Vic.	Q'land.	S. Aust.	W. Aust.	Tas.	Nor. Terr.	Aust. Cap. Terr.	Aust.
1955 .. ..	3,461	2,456	7,238	524	861	319	969	8	15,836
1956 .. ..	3,678	2,616	7,331	566	897	332	1,028	9	16,457
1957 .. ..	3,911	2,765	7,462	621	957	354	1,176	11	17,257
1958 .. ..	3,736	2,750	7,187	597	997	371	1,244	10	16,892
1959 .. ..	3,664	2,651	6,884	576	1,000	374	1,099	9	16,257

Although the proportion was not as high as it has been in some previous years, Queensland was carrying 42 per cent. of the cattle in Australia in 1959. The percentage in each State and Territory during that year was:—New South Wales, 23; Victoria, 16; Queensland, 42; South Australia, 4; Western Australia, 6; Tasmania, 2; and Northern Territory, 7.

Maps showing the distribution of beef and dairy cattle in Australia have been published in previous issues of the Official Year Book (*see* No. 43, pp. 909–10 for 1955; No. 39, pp. 905–6, for 1948; No. 34, pp. 453–4, for 1938–39; and No. 22, p. 660, for 1924–25).

3. **Classification of Cattle According to Purpose.**—Of the total number of cattle in Australia in 1959, 11,411,061 or 70 per cent. were classified as beef cattle. The numbers classified as beef cattle in the several States and Territories, during the years 1955 to 1959, were as follows:—

**BEEF CATTLE: NUMBER.**  
(<sup>'000.</sup>)

Year.	N.S.W.	Vic.	Q'land.	S. Aust.	W. Aust.	Tas.	Nor. Terr.	Aust. Cap. Terr.	Aust.
1955 .. ..	2,196	856	5,861	255	633	129	969	5	10,904
1956 .. ..	2,341	954	5,946	302	673	148	1,028	6	11,398
1957 .. ..	2,577	1,044	6,087	356	733	158	1,176	8	12,139
1958 .. ..	2,429	1,026	5,917	338	771	167	1,244	6	11,898
1959 .. ..	2,382	998	5,643	328	784	171	1,099	6	11,411

Particulars relating to dairy cattle numbers will be found in Chapter XXIV.—Farm-yard, Dairy and Bee Products.

4. **Size Classification of Cattle Herds.**—A special series of tabulations relating to rural holdings in Australia was compiled for 1955–56 and published in full detail in a series of mimeographed bulletins, *Size Classification of Rural Holdings, 1955–56*. Condensed tables also appear in *Primary Industries, Part I, Bulletin No. 51*. The tables relating to beef and dairy cattle show classifications according to size of herd, area of holding, area of wheat for grain and area of sown pastures.

5. **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 for the years 1936–40 and at the latest available date. The figures, which, in general, have been compiled by the United States Department of Agriculture for publication in *Foreign Crops and Markets* and *Foreign Agriculture Circular*, and by the Food and Agriculture Organization of the United Nations for publication in *Yearbook of Food and Agricultural Statistics: Production*, relate to areas embraced by post-war boundaries, but do not cover identical areas for the two periods in all cases.

**CATTLE: NUMBER IN VARIOUS COUNTRIES.**  
(\*000.)

Country.	Average, 1936-40.(a)	Year and Month.	Number.
India(b) .. .. .	180,000	1956 (May) ..	203,629
United States of America .. .. .	66,706	1959 (January) ..	96,851
Brazil .. .. .	40,807	1959 (December) ..	72,000
U.S.S.R. .. .. .	59,800	1959 (January) ..	70,800
China .. .. .	25,600	1956 (May) ..	45,300
Argentina .. .. .	33,762	1958 (June) ..	41,100
Pakistan(b) .. .. .	33,000	1956 (December) ..	37,569
Ethiopia .. .. .	18,000	1958 (January) ..	23,000
Mexico .. .. .	11,716	1959 (December) ..	19,400
France .. .. .	15,504	1959 (October) ..	18,404
Australia .. .. .	<b>13,285</b>	<b>1959 (March) ..</b>	<b>16,400</b>
Colombia .. .. .	8,010	1959 (October) ..	14,490
Turkey(b) .. .. .	8,611	1959 (December) ..	13,088
Germany, Federal Republic of ..	12,114	1959 (December) ..	12,071
Union of South Africa .. .. .	11,636	1955 (August) ..	12,000

(a) In some cases census for a single year, and in others an average for two to four years.  
(b) Includes buffaloes.

6. **Imports and Exports of Cattle.**—The products of the cattle-raising industry figure largely in the export trade of Australia although until recently the export of live cattle has never been large. In 1958-59, exports of cattle, mainly to the Philippines for slaughter, amounted to 13,900 valued at £493,000. The number of cattle imported is small, and as in the case of horses, consists mainly of valuable animals for stud purposes. Details for the years 1954-55 to 1958-59 are as follows:—

**CATTLE: IMPORTS AND EXPORTS, AUSTRALIA.**

Year.	Imports.		Exports.	
	No.	Value. (£'000.)	No.	Value. (£'000.)
1954-55 .. .. .	1,679	155	6,786	346
1955-56 .. .. .	304	229	8,025	475
1956-57 .. .. .	145	123	18,360	754
1957-58 .. .. .	272	174	23,941	933
1958-59 .. .. .	37	62	13,900	493

The average value per head of the cattle imported during the last five years was £305 while the average value per head of the cattle exported during the same period was £42.

7. **Cattle Slaughtered.**—The numbers of cattle slaughtered during each of the years ended June, 1955 to 1959, are shown in the following table:—

**CATTLE (INCLUDING CALVES) SLAUGHTERED.**  
(\*000.)

Year ended June—	Slaughterings passed for Human Consumption.								Total Slaughterings including Boiled Down.	
	N.S.W.	Vic.	Qld.	S.A.	W.A.	Tas.	N.T.	A.C.T.		Aust.
1955 .. .. .	1,518	1,024	1,430	233	181	75	16	8	4,485	4,550
1956 .. .. .	1,547	1,023	1,502	227	191	88	25	9	4,612	4,675
1957 .. .. .	1,591	1,139	1,641	252	192	102	25	10	4,952	5,017
1958 .. .. .	1,742	1,404	1,541	282	216	118	24	12	5,339	5,411
1959 .. .. .	1,894	1,397	1,883	287	249	128	24	10	5,872	5,960

8. Production of Beef and Veal.—Details of the production of beef and veal in each State and Territory are shown in the following table for the years indicated:—

PRODUCTION OF BEEF AND VEAL (BONE-IN WEIGHT): AUSTRALIA.

('000 tons.)

Year ended June—	N.S.W.	Vic.	Qld.	S. Aust.	W.A.	Tas.	N.T.	A.C.T.	Aust.
1955 ..	215	143	272	34	37	14	3	2	720
1956 ..	222	139	292	38	38	15	5	2	751
1957 ..	236	159	317	40	38	18	5	2	815
1958 ..	233	181	270	41	39	20	5	2	791
1959 ..	275	189	328	42	45	20	5	2	906

9. Consumption of Beef and Veal.—For the three years 1936–37 to 1938–39, the average annual production of beef and veal in Australia was 569,000 tons of which 127,000 tons were exported, leaving a balance of 442,000 tons (or the carcass equivalent of 144 lb. per head of population per annum) available for consumption as fresh and canned meat. Since the 1939–45 War, consumption per head of beef and veal has been at a somewhat lower level. For the three years 1946–47 to 1948–49, the average annual consumption per head was 112.5 lb. or 13 per cent. below the immediate pre-war level. In 1958–59 it amounted to 121.9 lb. per head, consisting of 118.1 lb. of carcass meat and 3.8 lb. (carcass equivalent) of canned meat.

In the following table, details of the production and disposal of beef and veal are shown for the years 1954–55 to 1958–59, compared with the averages for the three years 1936–37 to 1938–39 and 1946–47 to 1948–49.

PRODUCTION AND DISPOSAL OF BEEF AND VEAL (BONE-IN WEIGHT): AUSTRALIA.

('000 tons.)

Year.	Net Change. in Stocks.	Production.	Exports.	For Canning.	Consumption in Australia as Human Food.		
					Total.	Per Head per Annum.	
Average, 1936–37 to 1938–39 .. ..	(a)	569	121	18	430	lb. 140.3	
Average, 1946–47 to 1948–49 .. ..	+	1	542	101	67	373	109.1
1954–55 .. ..	+	4	720	137	106	473	116.5
1955–56 .. ..	—	7	751	163	100	495	119.1
1956–57 .. ..	+	4	815	177	85	549	128.9
1957–58 .. ..	+	4	791	155	86	546	125.5
1958–59 .. ..	+	9	906	295	77	525	118.1

(a) Not available.

10. Exports of Frozen Beef and Veal.—The export of frozen meat from Australia dates from about 1881, and since that year the trade has grown considerably. The quantity and value of frozen beef and veal exported in each year 1954–55 to 1958–59 are shown in the following table.

## EXPORTS OF FROZEN BEEF AND VEAL: AUSTRALIA.

Year.	Exports of Frozen and Chilled Beef.		Exports of Frozen Veal.	
	Quantity.	Value.	Quantity.	Value.
	'000 lb.	£'000.	'000 lb.	£'000.
1954-55 .. .. .	271,772	21,408	4,626	491
1955-56 .. .. .	318,059	22,936	4,689	495
1956-57 .. .. .	331,255	22,863	3,391	408
1957-58 .. .. .	276,607	20,961	5,397	609
1958-59 .. .. .	499,396	54,157	10,924	1,337

The largest purchaser of Australian beef and veal is the United Kingdom. In 1958-59, shipments to that country were valued at £30,918,000 or 56 per cent. of the total value of beef and veal exports, while exports to the United States of America amounted to £18,365,000 or 33 per cent. of the total.

Because of the preference overseas for chilled beef, the Australian beef industry was at a serious disadvantage until investigations proved that beef could be successfully transported from Australia to the United Kingdom in a chilled condition. Trial shipments began in 1932-33 and exports in subsequent years increased to a maximum of 58,963,000 lb. in 1938-39. However, the 1939-45 War seriously affected the export trade in chilled beef, which declined to a negligible amount after 1939-40. In 1958-59, chilled beef exports were 13,358,000 lb. valued at £1,185,000, whilst frozen beef exports amounted to 486,038,000 lb. valued at £52,972,000.

Both quantity and value of exports of beef, in particular, reached a record level during 1958-59. The value of exports to the United Kingdom was approximately double that of the previous year and the new marketing arrangements mentioned on page 954 permitted the substantial increase in exports to the United States.

#### § 4. Sheep.

1. **Introduction of Sheep.**—The suitability of the Australian climate and general conditions for the production of a high class of wool were recognized at an early date by Captain Macarthur, one of the pioneer sheep-breeders of New South Wales. 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 sheep industry in Australia is certainly his.

2. **Movement in Sheep Numbers in Australia.**—Fluctuations in the number of sheep recorded in Australia for each year from 1860 onwards may be seen from the graph on page 958. Up to 1945, there were five marked periods of decline, but the losses were made up rapidly. In each of the years 1925 to 1945, the sheep flocks exceeded 100 million, reaching 125.2 million in 1942. During the three years ended 1947, however, a sharp decline to 95.7 million occurred. This was largely attributable to the severe drought conditions

experienced during 1944, 1945 and 1946. The passing of the drought and consequent re-stocking resulted in a steady increase in sheep numbers, and although dry seasonal conditions were responsible for a slight decline at 31st March, 1958, a record level of 152.7 million was reached at 31st March, 1959.

The following table shows the approximate movement in sheep numbers in Australia in each year 1954-55 to 1958-59.

**SHEEP AND LAMBS : ANALYSIS OF MOVEMENT IN NUMBERS, AUSTRALIA.**  
( '000.)

Season.	Lambs Marked.	Excess of Exports.	Sheep and Lambs Slaughtered.	Estimated Number of Deaths from Disease, Drought, etc.(a)	Number at 31st March.	Annual Net Increase (+) or Decrease(-)
1954-55.. ..	32,804	97	22,454	6,348	130,849	+ 3,905
1955-56.. ..	36,914	97	21,180	7,362	139,124	+ 8,275
1956-57.. ..	39,902	122	19,503	9,599	149,802	+ 10,678
1957-58.. ..	36,398	120	24,417	12,348	149,315	- 487
1958-59.. ..	38,748	136	26,775	8,467	152,685	+ 3,370

(a) Balance figure.

3. **Distribution throughout Australia.**—With the exception of a short period in the early eighteen-sixties, when the flocks of Victoria outnumbered those of New South Wales, the latter State has occupied the premier position in sheep-raising, depasturing nearly one-half of the sheep of Australia.

Maps showing the distribution of sheep in Australia have been published in previous issues of the Official Year Book (*see* No. 43, p. 911, for 1955; No. 39, p. 907, for 1948; No. 34, p. 432, for 1938-39; and No. 22, p. 659, for 1924-25).

The numbers of sheep in the several States and Territories at 31st March of each year 1955 to 1959, are shown in the following table:—

**SHEEP : NUMBER.**  
( '000.)

Year.	N.S.W.	Vic.	Q'land.	S. Aust.	W. Aust.	Tas.	Nor. Terr.	Aust. Cap. Terr.	Australia.
1955 .. ..	59,200	22,330	20,222	12,817	13,411	2,595	29	245	130,849
1956 .. ..	62,988	23,343	22,116	13,585	14,128	2,673	33	258	139,124
1957 .. ..	67,670	25,831	23,190	14,984	14,887	2,943	30	267	149,802
1958 .. ..	65,410	27,090	22,274	15,236	15,724	3,298	27	256	149,315
1959 .. ..	67,936	26,925	22,148	15,634	16,215	3,536	19	272	152,685

Except when affected by drought, the relative numbers of sheep in the different States in recent years have remained fairly constant.

The percentage distribution in 1959 was:—New South Wales, 44; Victoria, 18; Queensland, 15; South Australia, 10; Western Australia, 11; and Tasmania, 2.

4. **Classification of Sheep According to Age, Sex and Breed.**—In the following table, numbers of sheep in Australia are classified according to age and sex at 31st March of the years 1955 to 1959.

## SHEEP : AGE AND SEX, AUSTRALIA.

('000.)

Description.	31st March—				
	1955.	1956.	1957.	1958.	1959.
Rams, 1 year and over ..	1,647	1,721	1,830	1,883	1,919
Breeding ewes (including ewes intended for mating) ..	58,614	62,483	66,844	66,059	69,470
Other ewes, 1 year and over ..	7,847	7,553	8,447	9,795	8,295
Wethers, 1 year and over ..	37,645	39,142	41,573	43,688	43,578
Lambs and hoggets, under 1 year .. .. .	25,096	28,225	31,108	27,890	29,423
<b>Total, Sheep and Lambs</b>	<b>130,849</b>	<b>139,124</b>	<b>149,802</b>	<b>149,315</b>	<b>152,685</b>

Particulars relating to the principal breeds of sheep at 31st March, 1959, are shown in the following table:—

## SHEEP : PRINCIPAL BREEDS, 31st MARCH, 1959.

('000.)

Breed.	N.S.W.	Victoria.	Q'land.	S. Aust.	W. Aust.	Tas.	N.T.	A.C.T.	Aust.
Merino ..	52,467	11,410	21,725	13,112	14,921	325	19	245	114,224
Other recognized breeds ..	6,037	6,118	72	1,061	542	1,841	..	12	15,683
Merino comebacks(a) ..	3,408	3,422	70	312	146	466	..	2	7,826
Crossbreds (b) ..	6,024	5,975	281	1,149	606	904	..	13	14,952
<b>Total ..</b>	<b>67,936</b>	<b>26,925</b>	<b>22,148</b>	<b>15,634</b>	<b>16,215</b>	<b>3,536</b>	<b>19</b>	<b>272</b>	<b>152,685</b>

(a) Merino comeback is the progeny of a crossbred merino ewe and a merino ram, i.e., finer than half-bred. (b) Half-bred and coarser.

5. **Numbers of Sheep on Rural Holdings.**—A special series of tabulations relating to rural holdings in Australia was compiled for 1955–56 and published in full detail in a series of mimeographed bulletins—*Size Classification of Rural Holdings 1955–56*. Condensed tables also appear in *Primary Industries, Part I*, Bulletin No. 51. The tables relating to sheep farming show classifications according to size of flock, area of holding, area of wheat for grain and area of sown pasture.

6. **Comparison with other Countries.**—Australia has long occupied the leading position amongst the sheep raising countries of the world in respect of the size of its flocks and the quantity and quality of wool produced. In 1957–58, Australian flocks numbered 149 million sheep, compared with an estimate of 205 million for the U.S.S.R., China, and Eastern Europe, about 46 million in Argentina and about 46 million in New Zealand. The total world sheep population was estimated at about 919 million in 1957–58. Further details of sheep numbers in the principal wool producing countries of the world for 1956–57 and 1957–58 are given in the table on page 969.

7. **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. On 27th November, 1929, the export of stud merino sheep was prohibited, except with the approval of the Minister for Primary Industry. Exports of sheep are now principally for slaughter overseas. Consignments for this purpose in recent years were made chiefly to Singapore from Western Australia. The following table shows the imports and exports of all sheep for the years 1954–55 to 1958–59.

## SHEEP : IMPORTS AND EXPORTS, AUSTRALIA.

Year.	Imports.		Exports.	
	No.	Value.	No.	Value.
		£'000.		£'000.
1954-55 .. .. .	232	13	97,146	340
1955-56 .. .. .	4,437	89	101,837	332
1956-57 .. .. .	7,445	212	129,480	482
1957-58 .. .. .	2,256	90	122,628	466
1958-59 .. .. .	5	1	135,720	393

8. Sheep Slaughtered.—The following table shows the numbers of sheep slaughtered in the several States during each of the years ended June, 1955 to 1959 :—

SHEEP (INCLUDING LAMBS) SLAUGHTERED.  
(‘000.)

Year.	Slaughterings Passed for Human Consumption.									Total Slaughterings including Boiled Down.
	N.S.W.	Vic.	Qld.	S.A.	W.A.	Tas.	N.T.	A.C.T.	Aust.	
1954-55.. .. .	7,318	8,714	1,009	2,799	1,673	643	3	74	22,233	22,303
1955-56.. .. .	6,840	7,860	1,186	2,358	1,796	645	2	73	20,760	20,797
1956-57.. .. .	6,951	7,038	1,270	2,329	1,907	684	2	66	20,247	20,310
1957-58.. .. .	7,761	9,624	1,378	3,278	1,856	734	4	74	24,709	24,878
1958-59.. .. .	8,861	10,514	1,633	3,145	2,415	909	4	71	27,552	27,646

9. Production of Mutton and Lamb.—Details of the production of mutton and lamb in each State and Territory are shown below:—

PRODUCTION OF MUTTON AND LAMB.  
(Tons.)

Year.	N.S.W.	Victoria.	Q'land.	S. Aust.	W. Aust.	Tas.	N.T.	A.C.T.	Aust.
1954-55 .. .. .	122,499	155,611	18,550	49,853	28,413	11,901	78	1,259	388,164
1955-56 .. .. .	120,615	146,228	23,020	44,339	32,759	11,778	59	1,333	380,131
1956-57 .. .. .	121,947	131,253	23,866	42,563	33,303	12,607	49	1,198	366,786
1957-58 .. .. .	127,800	169,107	24,381	53,681	31,942	13,221	90	1,254	421,476
1958-59 .. .. .	156,020	193,379	29,286	55,001	40,875	16,403	93	1,269	492,326

10. Consumption of Mutton and Lamb.—For the three years 1936-37 to 1938-39, the annual production of mutton and lamb averaged 319,000 tons of which 88,900 tons were exported leaving a balance of 230,100 tons (or the carcass equivalent of 74.8 lb. per head of population per annum) available for consumption.

Civilian consumption of mutton and lamb (in carcass equivalent weight including that used for canning) rose substantially during the 1939-45 War, but fell again in 1946-47 and up to 1951-52 was lower than in pre-war years. It rose during succeeding years to 78 lb. per head in 1952-53, and except for slight drops in 1955-56 and 1956-57 this level was maintained up to 1957-58. There was a further sharp rise in 1958-59 to 87 lb. per head.

In the following table, details of the production and disposal of mutton and lamb are shown for the periods stated.

**PRODUCTION AND DISPOSAL OF MUTTON AND LAMB (BONE-IN WEIGHT):  
AUSTRALIA.  
(<sup>'000 tons.</sup>)**

Year.	Changes in Stock.	Pro-duction.	Exports.	For Canning and Dehydration.	Consumption in Australia.	
					Total.	Per Head per Annum. (lb.)
<b>MUTTON.</b>						
Average 1936-37 to 1938-39 .. ..	..	201	17	..	184	59.8
Average 1946-47 to 1948-49 .. ..	..	177	15	8	154	45.1
1954-55 .. ..	- 1	240	15	15	211	52.1
1955-56 .. ..	- 1	234	15	16	204	49.1
1956-57 .. ..	+ 2	224	10	13	199	46.8
1957-58 .. ..	+ 1	270	23	26	220	50.5
1958-59 .. ..	- 2	310	49	17	246	55.1
<b>LAMB.</b>						
Average 1936-37 to 1938-39 .. ..	..	118	72	..	46	15.0
Average 1946-47 to 1948-49 .. ..	- 1	130	45	..	86	25.2
1954-55 .. ..	..	148	42	..	106	26.0
1955-56 .. ..	..	145	36	..	109	26.2
1956-57 .. ..	+ 1	143	24	..	118	27.7
1957-58 .. ..	- 1	152	29	..	122	28.4
1958-59 .. ..	..	182	40	..	142	31.9

11. **Exports of Frozen Mutton and Lamb.**—The export trade in mutton and lamb preserved by cold process expanded rapidly up to 1913 when 205 million lb. were shipped. It declined in subsequent years and it was not until 1942-43 that it almost reached this level again. In earlier years, shipments consisted mainly of frozen mutton, but in 1923-24 lamb supplanted mutton and the exports of lamb were largely responsible for the increase in total shipments during the ten years to 1942-43. Exports, however, fell again after 1942-43 and in 1956-57 amounted to only 76,274,000 lb. but in 1958-59 recovered to 165,841,000 lb., consisting of 91,191,000 lb. lamb and 74,650,000 lb. mutton.

The quantities and values of exports of frozen mutton and lamb in each year 1954-55 to 1958-59 are shown in the following table.

**EXPORTS OF FROZEN MUTTON AND LAMB: AUSTRALIA.**

Year.	Exports of Frozen Mutton.		Exports of Frozen Lamb.		Exports of Frozen Mutton and Lamb.	
	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.
	<sup>'000 lb.</sup>	£ <sup>'000.</sup>	<sup>'000 lb.</sup>	£ <sup>'000.</sup>	<sup>'000 lb.</sup>	£ <sup>'000.</sup>
1954-55.. ..	33,811	1,626	94,982	10,191	128,793	11,817
1955-56.. ..	34,657	1,885	81,626	7,867	116,283	9,752
1956-57.. ..	23,012	1,322	53,262	4,773	76,274	6,095
1957-58.. ..	42,270	2,253	64,352	6,132	106,622	8,385
1958-59.. ..	74,650	5,851	91,191	8,151	165,841	14,002

As with beef, the principal customer in this trade has normally been the United Kingdom. In 1958-59, exports of mutton and lamb to that country represented 39 per cent. and 83 per cent., respectively, of the total quantities exported. Forty-seven per cent. of the mutton exported went to the United States of America, although the proportion of lamb exported to that country was only three per cent.



§ 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 more than one-quarter of the world's wool (30 per cent. in 1958–59) and about half of the total fine-quality merino wool. The bulk of the production is exported, mainly as greasy wool, although substantial amounts of scoured and carbonized wool, wool on sheep skins and small quantities of semi-manufactured wool are also shipped. The remainder, which is used by Australian manufacturers, has amounted to only five per cent. of the total production (greasy basis) in recent years.

The important position held by Australia among the principal sheep and wool producing countries of the world is shown in the table on page 969.

2. **Greasy and Scoured Wool.**—Whether the weight of the wool clip should be stated as “in the grease” or as “clean” is a matter which seriously affects comparisons between the clips of different seasons and of different countries. The quantity of grease and other 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.

From 1946–47 to 1952–53, the Australian Wool Realization Commission, and from 1953–54, the Wool Statistical Service, has assessed annually the clean yield of the Australian wool clip. Apart from a fall in 1953–54 when the yield fell to 55.7 per cent. from 57.5 per cent. in the previous year, a steady increase in the yield of clean from greasy wool was maintained from 1946–47 to 1956–57, when it reached 57.7 per cent. In 1957–58 and 1958–59, the yield fell again to 56.7 per cent. and 56.6 per cent. respectively. A standard factor of 93 per cent. is taken as the clean yield of Australian scoured wools.

Wool scoured, washed and carbonized in Australia before export, however, has a clean yield somewhat lower than for the whole clip, because the grade of greasy wool treated locally for export as scoured, washed or carbonized includes a large proportion of dirty and low-grade wool. In recent years, it has approximated 53 per cent. The quantity of this wool exported during 1958–59 was approximately 12 per cent. of the total raw wool exports (excluding wool exported on skins) in terms of greasy.

3. **Production.**—The bulk of the Australian wool production is shorn from live sheep. In recent years, approximately 3 per cent. was obtained by fellmongering and about 5 per cent. was on skins exported. Statistics of wool production are compiled from data received from growers, fellmongers, etc. The following table shows the production for the five years 1954–55 to 1958–59. Particulars of the gross value of wool produced are based, for shorn wool, upon the average price realized for greasy wool sold at auction, and for skin wools, on prices recorded by fellmongers and skin exporters.

WOOL: TOTAL PRODUCTION (IN TERMS OF GREASY).

Particulars.	1954–55.	1955–56.	1956–57.	1957–58.	1958–59.
	'000 lb.	'000 lb.	'000 lb.	'000 lb.	'000 lb.
New South Wales .. ..	540,977	593,712	660,343	557,287	684,184
Victoria .. ..	253,364	273,356	299,572	296,490	298,844
Queensland .. ..	176,548	194,014	227,664	204,375	219,148
South Australia .. ..	155,761	173,697	188,808	185,843	186,842
Western Australia .. ..	129,662	156,454	156,402	158,281	166,522
Tasmania .. ..	23,797	23,418	28,663	29,154	32,605
Northern Territory(a) ..	311	393	346	291	195
Australian Capital Territory ..	2,232	2,328	2,457	2,133	2,522
<i>Australia—</i>					
Shorn (including Crutchings)	1,173,906	1,303,944	1,457,387	1,319,941	1,456,759
Dead and Fellmongered ..	44,417	44,051	37,724	30,894	41,795
Exported on Skins .. ..	64,329	69,377	69,144	83,019	92,308
<i>Total—Quantity</i> .. ..	<i>1,282,652</i>	<i>1,417,372</i>	<i>1,564,255</i>	<i>1,433,854</i>	<i>1,590,862</i>
	£'000.	£'000.	£'000.	£'000.	£'000.
„ <i>Value</i> .. ..	367,138	354,064	507,615	363,406	311,415

(a) Estimated prior to 1957–58.

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. **Average Weights of Fleeces Shorn.**—The average weights of sheep and lamb fleeces shorn in each of the States of Australia and in the Australian Capital Territory are shown in the following table for each season 1954–55 to 1958–59.

**AVERAGE WEIGHT OF SHEEP AND LAMB FLEECES SHORN.**  
(lb.)

State.	1954–55.	1955–56.	1956–57.	1957–58.	1958–59.
<b>SHEEP.</b>					
New South Wales .. .. .	9.32	10.01	9.92	8.45	9.88
Victoria .. .. .	9.83	10.41	11.02	9.69	9.47
Queensland .. .. .	9.23	9.96	9.98	8.93	9.75
South Australia .. .. .	11.86	12.68	13.14	11.60	11.87
Western Australia .. .. .	9.76	11.33	10.73	10.54	10.49
Tasmania .. .. .	9.31	8.85	10.07	9.38	9.37
Australian Capital Territory .. .. .	9.03	9.75	10.20	8.28	10.41
Australia(a) .. .. .	9.69	10.45	10.51	9.30	10.03
<b>LAMB.</b>					
New South Wales .. .. .	2.90	3.11	3.30	2.75	3.08
Victoria .. .. .	2.62	2.78	3.11	2.71	2.59
Queensland .. .. .	3.61	4.18	4.09	3.76	3.84
South Australia .. .. .	3.29	3.92	4.11	3.37	3.52
Western Australia .. .. .	2.50	2.88	2.78	2.77	2.60
Tasmania .. .. .	2.14	2.36	2.46	2.40	2.31
Australian Capital Territory .. .. .	1.16	1.33	1.52	1.19	1.45
Australia(a) .. .. .	2.91	3.22	3.37	2.91	3.03

(a) Excludes Northern Territory.

6. **Wool classified according to Quality.**—Under control exercised during the 1939–45 War, records were kept of the classification of each lot of wool appraised according to quality, degree of fault and combing or carding type for each of the years 1940–41 to 1945–46. From the resumption of auctions in 1946–47 to 23rd October, 1953, this analysis was continued by the Australian Wool Realization Commission and from 23rd October, 1953, by the Wool Statistical Service, but the basis of the data has been changed to the catalogues of auction sales, and not upon appraisal as previously. The following table provides a detailed analysis of wool sold at auction according to quality, for the years 1954–55 to 1958–59. "Quality" ("64's, 60's, 58's," etc.) is a measure of the fineness and texture of wool for spinning purposes. Broadly, it means the maximum number of hanks of yarn, each of 560 yards length, which can be spun from 1 lb. of combed wool. For instance, wool of 64's quality is of a fineness and texture which will produce 64 hanks, each of 560 yards, from 1 lb. of tops (combed wool) of that particular wool.

**CLASSIFICATION OF GREASY WOOL SOLD AT AUCTION(a): AUSTRALIA.**  
(Bales of approximately 300 lb.)

Pre-dominating Quality.	1954–55.		1955–56.		1956–57.		1957–58.		1958–59.	
	Quantity.	Per cent.	Quantity.	Per cent.	Quantity.	Per cent.	Quantity.	Per cent.	Quantity.	Per cent.
70's and finer	95,055	2.5	86,925	2.1	100,011	2.1	114,188	2.7	112,966	2.5
64/70's .. .. .	415,012	10.9	424,946	10.2	527,264	11.1	609,897	14.3	442,019	9.5
64's .. .. .	595,519	15.6	583,929	14.0	690,038	14.5	696,064	16.4	607,653	13.1
64/60's .. .. .	376,607	9.9	390,633	9.4	478,418	10.1	392,933	9.2	477,054	10.3
60/64's .. .. .	752,490	19.7	833,228	20.0	987,496	20.8	847,824	19.9	1,021,139	21.9
60's and 60/58's .. .. .	641,970	16.8	746,019	17.9	804,363	16.9	645,119	15.2	837,338	17.9
Total 60's and finer	2,876,653	75.4	3,065,680	73.6	3,587,590	75.5	3,306,025	77.7	3,498,169	75.2
58's .. .. .	416,419	10.9	503,868	12.1	502,566	10.6	435,436	10.2	519,238	11.2
56's .. .. .	312,055	8.2	350,219	8.4	376,660	7.9	297,662	7.0	363,968	7.8
50's .. .. .	125,878	3.3	146,640	3.5	162,533	3.4	116,329	2.7	149,356	3.2
Below 50's .. .. .	42,523	1.1	47,505	1.1	50,055	1.0	38,514	0.9	44,292	1.0
Oddments .. .. .	44,209	1.1	53,747	1.3	74,226	1.6	65,348	1.5	74,385	1.6
Grand Total	3,817,737	100.0	4,167,659	100.0	4,753,630	100.0	4,259,314	100.0	4,649,408	100.0

(a) All greasy wool sold at auction except "wool re-offered account buyer".

7. **World Sheep Population and Wool Production.**—The following table shows particulars of the sheep population and total production of wool, in terms of greasy, in the principal wool-producing countries of the world, together with estimates of world production of merino, crossbred and carpet type wool for the latest available years. The data have been taken from reports published by the Commonwealth Economic Committee compiled from questionnaires prepared by the Committee and the International Wool Textile Organization and from other official sources.

In 1958-59, Australia produced 30 per cent. of the world total of all types of wool, the share of all British Commonwealth countries combined representing approximately 50 per cent. The principal wool producers, other than Australia, are New Zealand with 10 per cent. of the world total, Argentina, 8 per cent., United States of America, 6 per cent., and Union of South Africa, 6 per cent. Production in the U.S.S.R., China, and Eastern European countries together amounted to 18 per cent. World production of wool (all types) in 1958-59 exceeded the average for 1934-38 by approximately 1,500 million lb. or 40 per cent.

Australia's wool clip is predominantly merino. New Zealand and Argentina produce mainly crossbred wool, while the clip of the U.S.S.R. is largely of the carpet type. World production of merino wool in 1958-59 was 40 per cent. above the average for 1934-38, and the production of crossbred types has risen by about 53 per cent. Carpet wool production has risen by about 26 per cent.

**ESTIMATED WORLD SHEEP POPULATION AND PRODUCTION OF WOOL.**

Country.	Sheep Numbers ('000,000).			Wool Production ('000,000 lb.— in terms of greasy).		
	1955-56.	1956-57.	1957-58. (a)	1956-57.	1957-58.	1958-59. (a)
<i>British Commonwealth—</i>						
Australia .. .. .	139.1	149.8	149.3	1,564	1,434	1,591
New Zealand .. .. .	40.3	42.4	46.0	491	496	540
South Africa (b) .. .. .	38.0	37.5	37.5	321	299	315
Other Commonwealth .. .. .	93.6	93.3	95.2	225	249	252
<i>Total</i> .. .. .	<i>311.0</i>	<i>323.0</i>	<i>328.0</i>	<i>2,601</i>	<i>2,478</i>	<i>2,698</i>
<i>Foreign—</i>						
U.S.S.R., China, Eastern Europe (c) .. .. .	200.0	189.0	205.0	829	895	981
Argentina .. .. .	45.2	45.7	46.0	388	409	421
United States of America .. .. .	31.3	30.8	31.3	307	293	293
Uruguay .. .. .	23.0	24.0	24.0	190	200	175
Other Foreign .. .. .	284.5	283.5	284.7	764	745	752
<i>Total</i> .. .. .	<i>584.0</i>	<i>573.0</i>	<i>591.0</i>	<i>2,478</i>	<i>2,542</i>	<i>2,622</i>
<b>Grand Total</b> .. .. .	<b>895.0</b>	<b>896.0</b>	<b>919.0</b>	<b>5,079</b>	<b>5,020</b>	<b>5,320</b>
<b>Type of Wool.</b>						
<i>Apparel Type—</i>						
Merino .. .. .	..	..	..	2,040	2,033	2,203
Crossbred .. .. .	..	..	..	1,920	1,823	1,930
Carpet type .. .. .	..	..	..	1,119	1,164	1,187

(a) Provisional. (b) Basutoland and S.W. Africa Territory excluded from sheep population, but included in wool production. (c) Comprises Albania, Bulgaria, China and Dependencies, Czechoslovakia, Eastern Germany, Hungary, Mongolia, Poland, Romania, Tibet and U.S.S.R.

8. **War-time Contracts.**—(i) *Wool.* Details of the contract entered into between the Governments of Australia and the United Kingdom for the purchase of the surplus wool clip of Australia for the duration of the war and one full clip thereafter (1939-40 to 1945-46) will be found in Official Year Book No. 36, page 1106.

(ii) *Sheepskins.* Details of the war-time contract arrangements for the period April, 1940, to June, 1946, between the Australian and United Kingdom Governments for the purchase of Australia's exportable surplus of woolled sheepskins will be found in Official Year Book No. 37, page 875.

9. **Australian Wool Realization Commission.**—The Australian Wool Realization Commission was the Australian subsidiary of a Joint Organization (commonly referred to as "J.O.") set up by the Governments of the United Kingdom, the Commonwealth of Australia, the Dominion of New Zealand and the Union of South Africa, under the title of "U.K.—

Dominion Wool Disposals Limited " to dispose of accumulated war-time stocks of Dominion wool held by the United Kingdom Government at the end of the war. Details of the functions and operations of these organizations appear in earlier issues of the Year Book, particularly No. 38, pages 919-923.

By the end of 1951, the Joint Organization had disposed of all stocks of wool held and shortly afterwards it went into voluntary liquidation. Liquidation proceedings were completed on 15th February, 1954.

Australia's share of the profits arising from the operations of J.O. amounted to approximately £93 million (including interest). The task of distributing the profits to growers was entrusted to the Australian Wool Realization Commission. Due to some protracted litigation, known as the "Poulton Case" (see Official Year Book No. 45, p. 947), final distribution was not effected until 1959.

A residue of £2.4 million, representing unclaimed moneys, was paid to the Wool Research Trust Fund, under the terms of the Wool Realization (Distribution of Profits) Act, 1957.

**10. Australian Wool Bureau.**—(i) *General.* The Australian Wool Bureau was constituted under the Wool Use Promotion Act 1953 and replaced the Australian Wool Board which was established in 1936. The Bureau's main function is to promote the use of wool by publicity and other means in Australia and overseas.

The Bureau consists of seven members appointed by the Governor-General for a term of three years. Of the seven members, three represent the Australian Wool and Meat Producers' Federation, three the Australian Woolgrowers' Council and the other member is nominated by the Commonwealth Government.

Particulars of the activities of the Bureau are given in para. 12, Wool Publicity and Research.

(ii) *Wool Statistical Service.* The Wool Statistical Service, formerly conducted by the Australian Wool Realization Commission, was taken over by the Australian Wool Bureau on 23rd October, 1953. The Statistical Service is responsible for the preparation and publication of statistical material relating to the Australian wool market and the composition of the Australian clip and other special statistical work which may be assigned to it.

It is financed out of the income received by the Australian Wool Bureau from wool stores under its control and from an annual contribution by the Commonwealth Government.

A Statistical Service Committee, consisting of representatives of the Australian Wool Bureau, the Commonwealth Government, wool buyers, wool growers and wool selling brokers' organizations, acts in an advisory capacity to the Australian Wool Bureau.

(iii) *Wool Stores.* Some three hundred wool stores, formerly the property of the Joint Organization and purchased from it by the Commonwealth Government, were transferred to the ownership of the Australian Wool Bureau by virtue of the Wool Stores Act 1953. The Bureau formally assumed control of these stores on 11th January, 1954, and at the same time received a substantial sum of money representing accumulated rentals and receipts from sales which had come to hand while the stores were held by the Commonwealth Government. Under the Act, the Bureau may dispose of these stores only with the permission of the Minister for Primary Industry and, in the event of war, may be required to return the stores without compensation to the Commonwealth Government. The stores are let by the Wool Bureau as a commercial proposition. The rental income is used to meet the expenses of maintaining, managing and insuring the stores, to defray the cost of operating the Wool Statistical Service and to help finance the wool promotion activities of the Bureau.

(iv) *The Contributory Charge.*—Associated legislation, namely, the Wool (Contributory Charge) Act 1945 (subsequently replaced by the Wool (Contributory Charge) Act (No. 1) 1950-1951 and the Wool (Contributory Charge) Act (No. 2) 1950-1951) and the Wool (Contributory Charge) Assessment Act 1945-1951 provided for a contributory charge to be imposed on woolgrowers on all shorn wool produced in Australia and sold after a date fixed by proclamation. The passage of amending Wool Tax legislation in June, 1952, made it possible to cease collection of the contributory charge at 30th June, 1952, and the legislation under which it was imposed was repealed. Further particulars of the Wool Contributory Charge and the amounts collected appear in Year Book No. 40, pages 675 and 819.

(v) *The Wool Levy.* While the contributory charge legislation, mentioned above, was in force, the Wool Levy, which was imposed by the Wool Tax Act 1936-1945 and the Wool Tax Assessment Act 1936, was temporarily suspended. When the Wool Levy was first imposed in 1936, the rate of tax on woolgrowers was 6d. a bale on all shorn wool produced in Australia and sold. The proceeds were paid into the Wool Publicity and Research Fund administered by the Australian Wool Board.

When collection of the contributory charge ceased (i.e., from 1st July, 1952), the Wool levy again became operative but at a higher rate. This rate was provided for in the Wool Tax Acts (Nos. 1 and 2) of 1952 under which a rate was prescribed between limits of 2s. and 5s. a bale on shorn wool produced in Australia and sold.

From 1952-53, the rate prescribed was 4s. a bale. The Wool Tax Acts (Nos. 1 and 2) of 1952 were repealed in May, 1957, and replaced by the Wool Tax Acts (Nos. 1 and 2) of 1957. The 1957 Acts maintained the levy on woolgrowers for wool promotion within the limits of 2s. to 5s. a bale on shorn wool produced in Australia and sold. In addition, provision was made under the 1957 Acts for woolgrowers to be levied at a maximum rate of 2s. a bale for wool research. The operative rates prescribed are 4s. a bale for wool promotion purposes and 2s. a bale for wool research.

11. **Marketing of Wool.**—(i) *Minimum Reserve Price Plan.* Details of the minimum reserve price plan which was completed by the Governments of Australia, New Zealand, South Africa and the United Kingdom in May, 1951, and which was rejected at a referendum of woolgrowers in Australia in September, 1951, will be found in Official Year Book No. 39, page 925.

(ii) *Subsidy on Woollen Goods, 1950-51.* Details of the subsidy paid on woollen goods manufactured for consumption in Australia from wool sold during the 1950-51 season will be found in Official Year Book No. 41, page 727.

12. **Wool Publicity and Research.**—(i) *Wool Use Promotion.* The Wool Use Promotion Act 1953-1957, defines the powers and functions of the Australian Wool Bureau as including measures for promoting, by publicity or other means, the use of wool in Australia or in other countries.

The Bureau is authorized also to take measures for improving the production of wool in Australia and encouraging research directed to the promotion of the use of wool.

The Bureau is associated with the New Zealand Wool Board and the South African Wool Board in maintaining the International Wool Secretariat, which was established in 1937 with head-quarters in London and with branches in fourteen countries. The function of the Secretariat is to promote the use of wool through a broad programme of publicity, education and research.

The activities of the Australian Wool Bureau are financed from the Wool Use Promotion Fund into which are paid the proceeds of the Wool Levy, and contributions from the rental income of the wool stores as mentioned in 10 (iii) above.

(ii) *Research.* Until 1945, the Australian Wool Board was responsible for the supervision of economic and scientific research but in that year the Commonwealth Scientific and Industrial Research Organization was made responsible for scientific, technical and biological research into sheep raising and wool production, as well as wool textile research. Economic wool research is the responsibility of the Bureau of Agricultural Economics, a division of the Commonwealth Department of Primary Industry. The economic research work falls into two main categories, namely, farm production economics dealing with economics of wool growing and sheep-station management generally, and commodity research dealing with the economic aspects of the wool industry in Australia and of wool as a commodity in world trade.

To finance the research programme, the Wool Research Trust Account was established under the Wool Use Promotion Act in 1945. Originally, a sum equal to the amount raised by the Wool Levy was paid annually by the Commonwealth Government into this account from Consolidated Revenue. The Wool Use Promotion Act 1953 fixed the rate of contribution at 2s. for each bale of shorn wool produced in Australia as from 1st July, 1952.

In addition, finance was available for research from the Wool Industry Fund. This Fund was established in 1946 from various moneys accumulated by the Central Wool Committee in war-time.

Under the Wool Research Act 1957, these sources of income together with an increased Government contribution totalling 4s. a bale, effective from 1st July, 1957, and a contribution of 2s. a bale from woolgrowers, effective from 1st July, 1957, collected under the Wool Tax Acts 1957, were combined into one fund known as the Wool Research Trust Fund. The use of this Fund is limited to sheep and wool research and expenditure therefrom is based on the recommendations of the Wool Research Committee. This committee comprises representatives of the C.S.I.R.O., the Universities, the Department of Primary Industry, Wool-growers' Organizations, the Australian Wool Bureau, and Textile Manufacturers.

Opportunity is afforded for co-operation with State Departments of Agriculture and other organizations in research and extension activities by the inclusion on the Committee of a representative of the Australian Agricultural Council in the capacity of an observer.

(iii) *The Australian Wool Testing Authority.*—The Australian Wool Testing Authority Act 1957 assented to on 12th September, 1957, constituted the Australian Wool Testing Authority, comprised of representatives of wool buyers, wool selling brokers, wool processors, the Australian Wool Bureau, the C.S.I.R.O. and the Commonwealth Government. It is intended that ultimately the Authority should be self-financing, but during the preliminary stages, the Commonwealth Government is providing the initial capital by way of a loan.

The function of the Authority is to provide a service in Australia for carrying out various tests on wool and wool products, particularly with regard to the moisture content of scoured and carbonized wool. Testing on a commercial basis commenced in September, 1958.

In February, 1959, the Authority was notified by the International Wool Textile Organization that it would be included in the organization's list of official wool testing establishments. This is the standard of international recognition for wool testing houses and gives the Australian Wool Testing Authority the same standing as similar organizations in other countries.

13. *Consumption of Wool.*—(i) *Consumption of Raw Wool.* Statistics of raw wool consumption published in recent years for the purposes of broad international comparisons are based on the quantities of scoured or carbonized wool used on the woollen and worsted systems (mill consumption) plus quantities used in such processes as felting. Consumption estimates compiled on this basis have obvious defects as they disregard oversea trade in semi-processed wool (e.g., tops and yarns) as well as woollen goods. They are, however, comparatively simple to calculate and are useful in providing an approximate indication of trends in wool consumption. Estimates of raw wool used on the woollen and worsted systems and by felt manufacturers in Australia, are shown below for the years 1954–55 to 1958–59.

#### ESTIMATED CONSUMPTION OF RAW WOOL IN AUSTRALIA.

(<sup>0</sup>000 lb.)

Year.	Greasy Basis.			Clean Basis.		
	Used on Woollen and Worsted Systems.	Used for Felt Manu- facture (including Hats).	Total.	Used on Woollen and Worsted Systems.	Used for Felt Manu- facture (including Hats).	Total.
1954–55 .. ..	82,923	7,552	90,475	48,930	3,587	52,517
1955–56 .. ..	92,374	7,586	99,960	54,847	3,603	58,450
1956–57 .. ..	108,255	5,218	113,473	65,504	2,479	67,983
1957–58 .. ..	103,704	4,480	108,184	63,153	2,128	65,281
1958–59 .. ..	103,180	3,192	106,372	62,834	1,516	64,350

(ii) *Consumption of Locally Processed Wool.* As considerable quantities of tops, noils and yarn are exported from Australia, the series on raw wool consumption shown above is over-stated to this extent. The series entitled "Consumption of Locally Processed Wool" provides a more reliable indication of wool consumption in Australia, as allowance has been made for exports of wool in semi-processed form. This series is shown below

for the years 1954-55 to 1958-59. Briefly, the series measures consumption of wool in terms of yarn used in Australian mills and other factories to produce woollen cloth and other woollen goods, yarn used for hand knitting purposes, and scoured wool used for felt manufacture. No allowance has been made for oversea trade in woollen piece goods, clothing, etc., because of the obvious difficulties of estimating accurately the wool content of these products.

### ESTIMATED CONSUMPTION OF LOCALLY PROCESSED WOOL IN AUSTRALIA

('000 lb.)

Year.	Greasy Basis.				Clean Basis.			
	Worsted Yarn Used. (a)(b)	Woollen Yarn Used. (b)	Scoured Wool used for Felt Manufacture (including Hats).	Total.	Worsted Yarn Used. (a)(b)	Woollen Yarn Used. (b)	Scoured Wool used for Felt Manufacture (including Hats).	Total.
1954-55 ..	41,056	26,599	7,552	75,207	23,775	16,299	3,587	43,661
1955-56 ..	43,041	27,837	7,586	78,464	25,176	17,014	3,603	45,793
1956-57 ..	44,325	30,093	5,218	79,636	26,172	18,737	2,479	47,388
1957-58 ..	40,716	32,288	4,480	77,484	23,992	19,324	2,128	45,444
1958-59 ..	38,040	29,424	3,192	70,656	22,730	18,462	1,516	42,708

(a) Includes hand knitting yarns used.

(b) Includes wool content of yarns containing a mixture of wool and other fibres.

14. Exports of Wool.—(i) *Greasy—Quantities.* Prior to the 1939-45 War, Australian greasy wool exported overseas was sent principally to the United Kingdom and other European countries. In 1938-39, 42 per cent. of total shipments were sent to the United Kingdom, other important consignees being France, 20 per cent., Belgium, 13 per cent., and Japan, 9 per cent. During the 1939-45 War, exports to the United States of America showed great expansion but have since dwindled to about 2 per cent. Of the total shipments in 1958-59, 26 per cent. went to the United Kingdom, 23 per cent. to Japan, 13 per cent. to France, 10 per cent. to Italy and 9 per cent. to Belgium-Luxemburg. The following table shows the quantities of greasy wool exported, and the principal countries of recorded destination.

### EXPORTS OF GREASY AND SLIPE WOOL.

('000 lb. actual weight.)

Country to which Exported.	1954-55.	1955-56.	1956-57.	1957-58.	1958-59.
United Kingdom .. .. .	299,571	275,573	306,504	251,305	305,968
Other Commonwealth Countries .. .. .	9,973	9,315	12,246	8,643	10,803
Japan .. .. .	124,718	189,852	233,036	203,988	273,503
France .. .. .	159,764	199,797	215,150	179,480	157,871
Italy .. .. .	89,457	93,266	123,438	130,062	113,156
Belgium-Luxemburg .. .. .	90,078	93,668	105,963	102,197	103,261
Germany, Fed. Rep. of .. .. .	64,779	74,945	82,897	66,117	60,070
United States of America .. .. .	58,962	48,059	37,454	21,235	28,299
Other Foreign Countries .. .. .	65,371	82,347	92,509	119,279	134,138
<b>Total .. .. .</b>	<b>962,673</b>	<b>1,066,822</b>	<b>1,209,197</b>	<b>1,082,306</b>	<b>1,187,069</b>

(ii) *Scoured and Washed and Carbonized—Quantities.* The exports of "scoured and washed" wool, whether carbonized or not, are shown below according to principal countries of destination.

**EXPORTS OF WOOL—SCOURED AND WASHED AND CARBONIZED.**  
(\*000 lb. actual weight.)

Country to which Exported.	1954-55.	1955-56.	1956-57.	1957-58.	1958-59.
United Kingdom .. ..	26,227	24,303	24,298	19,525	24,597
Canada .. ..	4,120	5,356	3,220	3,901	4,803
Other Commonwealth Countries	1,098	1,285	1,538	1,857	1,977
United States of America ..	16,866	16,919	13,294	13,575	14,815
Germany, Fed. Rep. of ..	5,818	8,329	10,583	12,252	8,699
Italy .. ..	4,657	6,017	7,671	7,405	7,117
Japan .. ..	836	2,428	3,943	720	4,325
France .. ..	5,994	5,309	6,245	6,205	3,732
Belgium-Luxemburg .. ..	5,127	3,601	4,017	2,734	1,754
Other Foreign Countries ..	11,476	11,397	15,928	20,068	18,775
<b>Total .. ..</b>	<b>82,219</b>	<b>84,944</b>	<b>90,737</b>	<b>88,242</b>	<b>90,594</b>

(iii) *Tops, Noils and Waste.* Particulars of the exports of tops, noils and waste are shown in the following table.

**EXPORTS OF WOOL TOPS, NOILS AND WASTE.**  
(\*000 lb. actual weight.)

Particulars.	1954-55.	1955-56.	1956-57.	1957-58.	1958-59.
Tops .. ..	5,911	11,107	14,949	16,921	20,203
Noils .. ..	3,625	4,507	4,578	3,298	4,355
Waste—Soft wool .. ..	2,238	7,094	14,697	3,484	7,744
Hard wool .. ..	3,928	3,617	4,428	3,195	4,388

(iv) *Total Exports—Greasy and Clean Bases.* The following table shows the estimated greasy and clean weights of exports of raw and semi-processed wool for the years 1954-55 to 1958-59.

**EXPORTS OF WOOL—GREASY AND CLEAN BASES.**  
(\*000 lb.)

Particulars.	1954-55.	1955-56.	1956-57.	1957-58.	1958-59.
<b>GREASY BASIS.</b>					
<i>Raw Wool—</i>					
Greasy and Slips .. ..	963,583	1,067,654	1,209,840	1,082,724	1,187,399
Scoured and Washed and Carbonized .. ..	154,838	158,774	171,848	164,019	169,021
Exported on Skins .. ..	64,329	69,377	69,144	83,019	92,308
<b>Total .. ..</b>	<b>1,182,750</b>	<b>1,295,805</b>	<b>1,450,832</b>	<b>1,329,762</b>	<b>1,448,728</b>
<i>Semi-processed Wool—</i>					
Tops .. ..	10,403	19,993	27,058	30,627	36,365
Yarn .. ..	229	123	149	158	128
<b>Total .. ..</b>	<b>1,193,382</b>	<b>1,315,921</b>	<b>1,478,039</b>	<b>1,360,547</b>	<b>1,485,221</b>
<b>CLEAN BASIS.</b>					
<i>Raw Wool .. ..</i>	667,347	741,653	841,371	760,229	827,418
<i>Semi-processed Wool .. ..</i>	6,160	11,510	16,080	18,364	20,882
<b>Total .. ..</b>	<b>673,507</b>	<b>753,163</b>	<b>857,451</b>	<b>778,593</b>	<b>848,300</b>



(v) *Total Value of Exports.* The value of wool (other than wool on sheepskins) exported from Australia during the five years ended 1958-59 averaged 46 per cent. of the total value of exports of merchandise of Australian origin, and during 1958-59 the proportion was 38 per cent. The value for the five years ended 1958-59 together with the principal countries to which wool was exported, is shown in the following table.

VALUE OF WOOL EXPORTS(a).  
(£'000.)

Country to which Exported.	1954-55.	1955-56.	1956-57.	1957-58.	1958-59.
United Kingdom .. ..	107,917	83,096	117,372	79,582	73,101
Other Commonwealth Countries ..	6,839	8,060	9,920	8,026	7,771
Japan .. ..	46,077	64,761	103,770	74,301	68,923
France .. ..	50,473	53,388	73,494	52,831	34,162
Italy .. ..	32,379	29,259	47,905	41,703	28,181
Belgium-Luxemburg .. ..	25,620	21,391	29,608	22,130	16,479
Germany, Fed. Rep. of .. ..	22,926	23,603	32,987	24,592	15,417
United States of America .. ..	29,801	21,636	20,705	12,864	11,270
Other Foreign Countries .. ..	31,076	32,335	47,964	57,368	46,939
<b>Total .. ..</b>	<b>353,108</b>	<b>337,529</b>	<b>483,725</b>	<b>373,397</b>	<b>302,243</b>

(a) Excludes wool exported on sheepskins.

15. **Local Sales of Wool.**—Auction sales are conducted at Sydney, Goulburn, Newcastle, Albury, Melbourne, Geelong, Ballarat, Brisbane, Adelaide, Perth, Albany, Hobart and Launceston, and are attended by buyers representing manufacturers and merchants in the United Kingdom, France, the United States of America, Japan, U.S.S.R. and many other countries. More than 95 per cent. of the Australian wool clip is now disposed of at auction in Australia.

16. **Stocks of Wool.**—Stocks of raw wool held in Australia at 30th June, 1959, amounted to 269.5 million lb. (as in the grease) of which 73.0 million lb. (51.5 million lb. as greasy and 21.5 million lb. as scoured and carbonized) were held by woollen mills, wool scourers and fellmongers, and 196.5 million lb., assumed to be all greasy, were held by brokers. Of the wool held by brokers, 33.9 million lb. were unsold wool and 162.6 million lb. were sold wool held awaiting shipment. These stocks exclude wool on skins, since this wool is not recorded as production until fellmongered in Australia or exported on skins.

17. **Price.**—Wool is the chief factor in the pastoral wealth of Australia and the nation's prosperity is largely dependent upon its satisfactory sale. During the five years ended 1958-59, the price of greasy wool sold in the selling centres of Australia averaged 64.5d. per lb. compared with the average selling price of 11.5d. per lb. during the ten years ended 1938-39. The average for the nine years ended 1928-29 was 18d. per lb., and for the seven years ended 1913-14, 9d. per lb.

As indicated in para. 8 above, the price of wool during the 1939-45 War was determined by the British Government wool contract. With the return to auction sales since 1945-46, the average price of greasy wool sold rose rapidly from the contract price of 15.45d. per lb. applicable in 1945-46 to the unprecedented level of 144.19d. per lb. in 1950-51. This was followed by a sharp fall and prices, in the years 1951-52 to 1957-58, fluctuated in the range 61d. to 82d. while in 1958-59 they fell to 48.6d., the lowest for ten years.

The prices quoted above, except for United Kingdom contract prices, are as compiled by the National Council of Wool Selling Brokers and represent the average price realized for all greasy wool, of whatever type or quality, marketed during the years indicated.

18. **Value.**—Fluctuation in Australian wool prices has a marked effect on the nation's rural income. In 1945-46, the gross value of wool production was £58,597,000 representing 17.4 per cent. of the gross value of all rural industries, while in 1950-51, when prices reached a peak, wool was valued at £651,902,000 or 55.6 per cent. of the total for all rural industries. The value of wool production fell in subsequent years and in 1958-59 was £311,415,000.

Details of the value of wool production for the years 1954-55 to 1958-59 are shown below.

**WOOL—ESTIMATED GROSS VALUE OF TOTAL PRODUCTION.(a)**  
**PRODUCTION.(a)**  
**(£'000.)**

Season.	N.S.W.	Vic.	Qld.	S. Aust.	W.Aust.	Tas.	N.T.(b)	A.C.T.	Aust.
1954-55 ..	155,335	75,125	52,109	41,602	35,013	7,232	68	654	367,138
1955-56 ..	149,128	69,020	53,134	39,911	35,881	6,190	92	708	354,064
1956-57 ..	217,124	97,659	77,522	57,289	46,965	9,974	106	976	507,615
1957-58 ..	143,337	76,255	53,836	42,354	39,209	7,742	67	606	363,406
1958-59 ..	134,764	59,471	45,075	33,797	30,915	6,844	36	513	311,415

(a) Includes shorn, dead and fellmongered wool and wool exported on skins. Excludes distribution of profits under the Wool Disposal Plan. (b) Estimated.

19. **United Kingdom Importation of Wool.**—The important position which Australia occupies in the supply of wool to the United Kingdom is indicated in the following statement of the quantities of wool imported into that country from the principal wool-producing countries during each year 1955 to 1959.

**WOOL(a): IMPORTS INTO UNITED KINGDOM.**  
**(‘000 lb.)**

Country of Origin.	1955.	1956.	1957.	1958.	1959.
Australia .. ..	336,800	310,585	315,310	292,407	334,124
New Zealand .. ..	185,440	163,550	166,050	168,241	171,027
Union of South Africa .. ..	64,315	61,194	45,563	52,594	65,005
India and Pakistan .. ..	30,505	25,912	29,889	22,717	25,450
Other Commonwealth Countries .. ..	9,785	9,583	11,410	9,671	10,455
Argentina .. ..	31,553	32,740	32,484	29,088	55,035
France .. ..	18,092	22,228	16,657	18,727	23,568
Uruguay .. ..	18,855	34,373	17,448	23,353	15,067
Other Foreign Countries .. ..	25,977	39,156	40,536	41,791	52,631
<i>Total Quantity</i> .. ..	<i>721,322</i>	<i>699,321</i>	<i>675,347</i>	<i>658,589</i>	<i>752,362</i>
Total Value (£'000 sterling) .. ..	176,995	167,927	188,754	134,001	147,257

(a) Greasy and Scoured.

Australian wool represented 44 per cent. of the total quantity imported into the United Kingdom during 1959. New Zealand supplied 23 per cent. and South Africa 9 per cent., while the total quantity received from British Commonwealth countries constituted 80 per cent. of all United Kingdom imports of wool.

20. **Principal Importing Countries and Sources of Supply.**—The following table, prepared from information published by the Commonwealth Economic Committee, furnishes, in respect of the principal importing countries, details of their production and imports of wool for 1958 together with the chief sources of supply. The quantities imported refer to the actual weight of wool without distinguishing between greasy and scoured except in the case of the United States of America where estimated clean content of raw wool is quoted.

WOOL: PRINCIPAL IMPORTING COUNTRIES AND SOURCES OF SUPPLY, 1958.  
(Million lb.)

Importing Country.	Pro- duction of Importing Country. (a)	Quantity Imported from— (b)					Total Imports.
		Australia.	New Zealand.	Union of South Africa.	Argen- tina.	Other Countries.	
United Kingdom ..	114	292.4	168.7	52.6	29.2	116.3	659.2
Belgium .. ..	(c)	107.0	24.7	8.5	6.7	13.7	160.6
France .. ..	56	168.6	88.6	39.1	20.4	21.3	338.0
Germany (Federal Republic) ..	(c)	74.4	27.1	26.3	8.3	46.7	182.8
Italy .. ..	32	121.7	20.3	22.1	5.9	43.5	213.5
Japan .. ..	(c)	222.8	16.0	7.6	17.8	9.5	273.7
United States of America(d) ..	293	25.5	44.8	14.0	52.2	53.1	189.6

(a) As in the grease, 1957-58. (b) Actual weight of greasy and scoured wool. (c) Not available. (d) Imports are in terms of estimated clean content of greasy and scoured wool. Actual weight of total United States of America imports was 273.6 million lb.

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 the United Kingdom (12 per cent. of total imports re-exported in 1958) and Belgium.

### § 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, sheep and other skins, and skin pieces, sent overseas during 1958-59 amounted to £23,572,000 compared with a total of £25,393,000 in 1957-58 and £24,269,000 in 1956-57.

2. **Sheepskins with Wool.**—The exports of sheepskins with wool constitute the most important item in the values referred to in the preceding paragraph. Of the total exports of £14,768,000 during 1958-59, France obtained 76 per cent. and the United Kingdom nine per cent. The exports of sheepskins with wool during each of the years 1954-55 to 1958-59 were as follows:—

#### EXPORTS OF SHEEPSKINS WITH WOOL: AUSTRALIA.

Particulars.	1954-55.	1955-56.	1956-57.	1957-58.	1958-59.
Number .. .. '000	14,841	14,891	14,239	19,441	20,180
Value .. .. £'000	15,569	15,268	19,438	20,219	14,768

3. **Sheepskins without Wool.**—Up to 1943-44, sheepskins without wool were exported chiefly to the United States of America. During 1943-44, that country accounted for 97 per cent. of the total shipments. In subsequent years, however, there has been a decline in shipments to the United States of America and an increase in the quantities shipped to other countries. Of the total value of £432,000 of sheepskins without wool exported in

1958-59 the United States of America received 66 per cent., France received nine per cent. and the United Kingdom 16 per cent. Quantities and values for the five years 1954-55 to 1958-59 are shown in the table hereunder:—

**EXPORTS OF SHEEPSKINS WITHOUT WOOL: AUSTRALIA.**

Particulars.	1954-55.	1955-56.	1956-57.	1957-58.	1958-59.
Number .. .. '000	2,147	1,771	1,353	813	2,082
Value .. .. £'000	372	424	479	232	432

4. **Hides.**—(i) *Exports.* The export trade in cattle hides and calfskins during 1958-59 was distributed as follows:—Japan, £2,948,000; Federal Republic of Germany, £901,000; United States of America, £847,000; The Netherlands, £684,000; Italy, £353,000; United Kingdom, £255,000; Sweden, £154,000 and other countries, £348,000.

The exports during each of the five years 1954-55 to 1958-59 are shown in the table below:—

**EXPORTS OF CATTLE HIDES AND CALFSKINS: AUSTRALIA.**

Particulars.	1954-55.	1955-56.	1956-57.	1957-58.	1958-59.
Quantity .. .. '000 lb.	33,817	45,981	45,111	50,557	85,324
Value .. .. £'000	1,874	2,722	2,524	3,240	6,490

Horse hides exported during 1958-59 weighed 1,595,326 lb. and were valued at £99,091.

(ii) *Imports.* The imports of cattle hides and calfskins are fairly large, the chief sources of supply being New Zealand and the Pacific Islands. The quantities and values of cattle hides including calfskins, imported into Australia during the years 1954-55 to 1958-59, were as follows:—

**IMPORTS OF CATTLE HIDES AND CALFSKINS: AUSTRALIA.**

Particulars.	1954-55.	1955-56.	1956-57.	1957-58.	1958-59.
Quantity .. .. cwt.	12,391	10,537	11,064	9,366	8,301
Value .. .. £'000	108	58	66	67	58

5. **Furred Skins.**—The exports of furred skins were valued as follows:—

**EXPORTS OF FURRED SKINS: AUSTRALIA.**  
(£'000.)

Description.	1954-55.	1955-56.	1956-57.	1957-58.	1958-59.
Rabbit and Hare .. ..	1,100	1,711	975	913	1,291
Opossum .. ..	42	15	53	91	..
Kangaroo and Wallaby .. ..	281	285	279	350	188
Other .. ..	7	2	6	11	1
<b>Total .. ..</b>	<b>1,430</b>	<b>2,013</b>	<b>1,313</b>	<b>1,365</b>	<b>1,480</b>

These skins were shipped principally to the United States of America, the United Kingdom, and Belgium and Luxemburg, the values shipped to each in 1958-59, with 1957-58 values in parentheses, being:—United States of America, £1,181,000 (£1,047,000); United Kingdom, £220,000 (£203,000) and Belgium-Luxemburg, £40,000 (£33,000).

6. **Marketing of Hides and Skins.**—(i) *Sheepskins with Wool.* Details of the agreement between the United Kingdom and Commonwealth Governments for the purchase by acquisition of the "exportable surplus" of woolled sheepskins in Australia during the 1939-45 War were given in Official Year Book No. 37, page 886. The contract expired on 30th June, 1946, and sheepskins have since been marketed mostly at open auction.

(ii) *Sheep and Lamb Pelts.* Details of the marketing control of sheep and lamb pelts were given in Official Year Book No. 38, page 930. Pelts have reverted to open marketing without export restrictions.

(iii) *Hides and Leather.* A hide acquisition and marketing scheme operated from November, 1939 to August, 1954. The Australian Hide and Leather Industries Board, which administered the scheme, acquired all cattle hides and yearling and calf skins produced in Australia at set prices and allocated them to tanners at these prices. Further details of the war-time operations of the scheme will be found in Official Year Book No. 37, page 887 and Official Year Book No. 38, pages 930-1.

Pre-war, about 40 to 45 per cent. of Australian production of cattle hides and calf skins was exported but, with the development of the local tanning industry, the proportion is now approximately 30 per cent.

(iv) *Rabbit Skins.* A marketing control scheme for rabbit skins was introduced under the National Security (Rabbit Skins) Regulations on 10th June, 1940, and terminated in April, 1949. Details of the scheme will be found in Official Year Book, No. 38, page 931..

## § 7. Tallow and Lard.

1. **Consumption of Tallow in Factories.**—Details of consumption are collected from the principal factories using tallow.

Consumption of inedible tallow in factories (soap and candle, chemical and woolscouring works) are shown in the following table. These figures are, however, deficient to the extent that no allowance has been made for small unrecorded amounts used in other types of establishments. Details of edible tallow consumed in factories are not available.

### INEDIBLE TALLOW : CONSUMPTION IN FACTORIES, AUSTRALIA.

(cwt.)

Year.	Quantity Used.	Year.	Quantity Used.
1954-55 .. .. .	1,193,368	1957-58 .. .. .	1,280,984
1955-56 .. .. .	1,210,694	1958-59 .. .. .	1,216,668
1956-57 .. .. .	1,207,578		

2. **Exports of Tallow and Lard.**—Particulars of exports of edible (including lard) and inedible tallow are shown in the following table for the five years 1954-55 to 1958-59:—

### TALLOW AND LARD: EXPORTS, AUSTRALIA.

(cwt.)

Particulars.	1954-55.	1955-56.	1956-57.	1957-58.	1958-59.
Edible(a) .. .. .	74,401	142,498	128,649	130,817	104,646
Inedible .. .. .	365,985	829,403	936,951	878,060	1,022,844
<b>Total .. .. .</b>	<b>440,386</b>	<b>971,901</b>	<b>1,065,600</b>	<b>1,008,877</b>	<b>1,127,490</b>

(a) Including lard and sweetened fats.

3. **Marketing of Tallow.**—Until 30th September, 1952, the bulk of Australia's exportable surplus tallow, other than collar white mutton tallow was sold to the United Kingdom Ministry of Food under a series of annual contracts. The 1951-52 contract was not renewed and on 9th November, 1952, tallow export control was removed following termination of the industry's equalization pool arrangement and price de-control in most States.

### § 8. Exports of Principal Pastoral Products.

The quantities and values of the principal pastoral products of Australia exported for the years 1956-57 to 1958-59 were as follows:—

#### EXPORTS OF PASTORAL PRODUCTS: AUSTRALIA.

Product.	Unit of Quantity.	Quantity.			Value (£'000.)		
		1956-57.	1957-58.	1958-59.	1956-57.	1957-58.	1958-59.
<b>Animals (living)—</b>							
Cattle .. .. .	No.	18,360	23,941	13,900	754	933	493
Horses .. .. .	"	682	770	349	326	339	222
Sheep .. .. .	"	129,480	122,628	135,720	482	466	393
Bones .. .. .	'000 cwt.	20	12	13	47	24	19
Glycerine .. .. .	'000 lb.	1,011	673	2,850	57	44	210
Hair and Bristles .. .. .	cwt.	2,299	2,147	2,658	151	128	90
Hoofs .. .. .	"	10,936	10,533	9,072	23	20	15
Horns .. .. .	"	9,104	8,475	15,321	81	58	66
<b>Meats—</b>							
Frozen Beef and Veal <sup>(a)</sup>	'000 lb.	334,646	282,004	510,320	23,271	21,570	55,494
" Mutton and Lamb	"	76,274	106,622	165,841	6,095	8,385	14,002
" Rabbits and Hares	Value only	..	..	..	2,513	2,802	3,051
" Other .. .. .	"	..	..	..	3,202	3,457	5,461
Preserved in Tins, etc. ..	'000 lb.	112,193	131,834	127,050	13,175	15,100	15,434
Other (excluding Bacon and Ham) .. .. .	Value only	..	..	..	849	1,148	1,405
Sausage Casings .. .. .	"	..	..	..	1,700	2,615	2,224
<b>Hides and Skins—</b>							
Cattle and Calf .. .. .	'000 lb.	45,111	50,557	85,324	2,524	3,240	6,490
Horse .. .. .	"	1,940	2,220	1,595	117	125	99
Sheep and Lamb .. .. .	'000.	15,592	20,254	22,262	19,917	20,451	15,200
Rabbit and Hare .. .. .	'000 lb.	2,464	3,686	4,453	975	913	1,291
Tallow (Edible and Inedible)	cwt.	1,057,145	995,046	1,096,897	4,373	4,311	4,488
<b>Wool—</b>							
Greasy .. .. .	'000 lb.	1,206,625	1,080,634	1,185,749	425,728	325,509	264,222
Scoured, Tops, Noils, Waste .. .. .	"	131,961	116,813	128,604	57,997	47,888	38,021

(a) Includes chilled beef.