

CHAPTER XXI.

FARMYARD, DAIRY AND BEE PRODUCTS.

NOTE.—Values of Australian oversea trade shown throughout this chapter are expressed as £A. f.o.b. Port of Shipment, except where otherwise indicated.

§ 1. Introductory.

1. **General.**—The introduction of cattle into Australia and the early history of the dairying industry are referred to in some detail in earlier issues of this publication. It may here be noted that the original stock has been crossed with specially imported stud cattle, while further judicious crossings of strains have resulted in an increased and improved milk supply. In Australia dairy cattle thrive in the open throughout the year, local climatic conditions demanding no protection other than tree plantations for shelter, and in certain districts rugging in the coldest weather. Indigenous and imported grasses furnish food during the greater part of the year, and winter fodder, when necessary, is given to the cattle in the fields. With the wider application of scientific methods in the treatment of animals and pasturages and in the processes of manufacture, coupled with herd testing and effective State supervision, the dairying industry has shown rapid expansion. It has been demonstrated that Australian production and marketing methods do not adversely affect the vitamin content of the butter and that the loss during cold storage even for as long as two years is insignificant.

2. **Mixed Farming.**—Dairying is not, as formerly, wholly confined to agriculturists, since many graziers in a large way of business also give it their attention. In non-coastal regions it is generally carried on in conjunction with agriculture and sheep-raising, sufficient fodder being grown to carry the cattle through the winter months. Local wants are thus met, and in many places remote from the metropolis well-equipped factories have been established. The extent to which dairy cattle were run in conjunction with pig raising and wheat growing in 1949-50 is shown in the relevant tables published in the section "Special Tabulations Relating to Rural Holdings, 1949-50" of *Primary Industries Bulletin* No. 44, 1949-50.

3. **Employment.**—The numbers of persons employed in primary industry are ascertained at the annual census of rural production. The particulars collected are in respect of those persons who were permanently engaged in the actual work of the farm and include owners, lessees, tenants or sharefarmers, relatives over 14 years of age not receiving wages, and other permanent employees, including managers and relatives, working for wages or salary. Details of the numbers so engaged are given in Chapter XX.—Agricultural Production, § 28.

For the years up to 1939-40, information was also collected which enabled the classification of each holding according to the chief purpose for which it was used, thus obtaining a distribution of employment in the three main classes, viz., Agriculture, Pastoral and Dairying. However, because of difficulties in determining with precision the chief purpose for which holdings are used, this information has since been omitted from the schedules. Consequently it has not been possible to continue to compile details of employment in the dairying industry from data obtained from this source.

Details of the number of persons who described themselves at the population census of 30th June, 1947 as being engaged in dairy farming were shown for each State in Official Year Book No. 38, page 1025. They comprised 96,508 males and 10,018 females, a total of 106,526 persons.

4. **Growth of the Dairying Industry.**—The following table gives some indication of the growth of the dairying industry since 1918-19 :—

DAIRYING INDUSTRY : AUSTRALIA.

Year.	Number of Dairy Cows.		Total Milk Produced for all Purposes.	Production of Butter.	Production of Cheese.	Milking Machines (No. of Stands) (a)
	In Milk.	Dry.				
			Mill. gals.	Tons.	Tons.	
918-19 ..	1,319,588	582,448	529.6	81,162	10,621	(b)
1928-29 ..	1,744,728	600,342	815.4	129,817	13,490	(b)
1938-39 ..	2,600,707	608,812	1,189.2	203,500	29,304	(b)
1947-48 ..	2,267,221	818,044	1,173.1	162,054	41,478	134,774
1948-49 ..	2,339,885	818,725	1,212.6	165,830	43,202	144,916
1949-50 ..	2,354,217	837,218	1,241.8	173,599	44,796	155,218
1950-51 ..	2,252,741	895,930	1,199.7	163,934	44,310	165,788
1951-52 ..	2,098,560	874,192	1,051.3	135,319	40,598	171,712

(a) "Number of Stands" indicates the number of cows that can be milked simultaneously—i.e., the cow capacity of installed milking machines. (b) Not available.

5. **Official Supervision of Dairying Industry.**—Dairy experts of the various State Agricultural Departments give instruction in approved methods of production, and inspect animals, buildings and marketable produce. A high standard of cleanliness, both of *personnel* and *materiel*, prevails.

The export trade is regulated by the terms of the Commonwealth Commerce (Trade Descriptions) Act 1905-1933, and regulations thereunder. It will be sufficient to state here that the true trade description, etc., must be marked on all produce intended for export, while official inspection ensures the maintenance of purity and quality. Upon request of the exporter the goods are given a certificate by the inspector.

6. **Australian Agricultural Council.**—General information on the constitution and functions of the Australian Agricultural Council is given on pages 832-4 of Chapter XX.—Agricultural Production. Details are also given on these pages of the production aims for the five-year period ended 1957-58 (including specific targets for the principal dairy products) as set by the Council at its 36th Meeting in April, 1952.

§ 2. Value of Farmyard, Dairy and Bee Production and Indexes of Price and Quantity Production.

1. **Gross Value of Farmyard, Dairy and Bee Production, 1936-37 to 1951-52.**—The following table shows the gross value of recorded farmyard and dairy production at the principal markets in Australia.

GROSS VALUE OF FARMYARD, DAIRY AND BEE PRODUCTION: AUSTRALIA.(a)
(£'000.)

Particulars.	Average 1936-37 to 1938-39.	1947-48.	1948-49.	1949-50.	1950-51.	1951-52.
Whole Milk(b) used for—						
Butter	22,550	29,753	34,655	39,414	36,692	38,875
Cheese	1,505	4,087	4,943	5,451	5,398	6,700
Condensing, concentrating, etc.	1,094	3,470	5,241	5,900	6,223	7,948
Human Consumption and other purposes ..	7,971	16,109	19,428	24,511	28,315	37,261
Subsidy Paid on Whole Milk for—						
Butter, Cheese, Condensing, Concentrating, etc. ..	..	8,104	5,540	8,062	13,629	15,041
Human Consumption ..	..	1,167	320	..	..	..
Total Whole Milk (in- cluding Subsidy) ..	33,120	62,690	70,127	83,338	90,257	105,825
Pigs Slaughtered	5,526	10,551	12,325	14,281	15,358	18,516
Dairy Cattle Slaughtered ..	1,591	2,602	2,769	3,492	4,872	5,966
Eggs	9,117	20,414	23,870	25,766	28,047	37,534
Poultry	2,386	6,297	7,146	7,726	9,408	10,985
Honey	154	781	1,597	787	871	800
Beeswax	10	40	87	50	71	62
Total	51,904	103,375	117,921	135,440	148,884	179,688

(a) Excludes Australian Capital Territory and Northern Territory, details for which are not available.
(b) Excludes Commonwealth subsidy which is shown separately below.

2. Gross and Net Values, 1951-52.—The values of dairy, poultry and bee farming on gross, local and net bases are shown in the following table. Production values for this and other industries are dealt with more fully in Chapter XXIX.—Miscellaneous.

GROSS, LOCAL AND NET VALUE OF FARMYARD, DAIRY AND BEE PRODUCTION,
1951-52.
(£'000.)

State.	Gross Production valued at Principal Markets.	Marketing Costs.	Gross Production valued at Farm.	Farm Costs.		Net Value of Pro- duction. (a)
				Fodder fed to Farm Stock.	Value of Other Materials used in process of Pro- duction.	

DAIRY PRODUCTION.

New South Wales ..	38,966	4,576	34,390	3,711	154	(b) 30,525
Victoria	47,285	1,859	45,426	4,474	1,800	39,152
Queensland	21,776	580	21,196	2,510	510	18,176
South Australia ..	10,573	221	10,352	798	696	8,858
Western Australia ..	6,789	190	6,599	1,487	1,109	4,003
Tasmania	4,918	239	4,679	1,409	208	(b) 3,062
Total	130,307	7,665	122,642	14,389	4,477	103,776

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

GROSS, LOCAL AND NET VALUE OF FARMYARD, DAIRY AND BEE PRODUCTION, 1951-52—*continued.*

(£'000.)

State.	Gross Production valued at Principal Markets.	Marketing Costs.	Gross Production valued at Farm.	Farm Costs.		Net Value of Production. (a)
				Fodder fed to Farm Stock.	Value of Other Materials used in process of Production.	
POULTRY PRODUCTION.						
New South Wales ..	20,775	1,927	18,848	5,119	..	13,729
Victoria ..	18,043	1,353	16,690	4,120	..	12,570
Queensland ..	2,358	345	2,013	730	75	1,208
South Australia ..	3,286	340	2,946	925	..	2,021
Western Australia ..	2,470	516	1,954	807	..	1,147
Tasmania ..	1,587	118	1,469	590	..	879
Total ..	48,519	4,599	43,920	12,291	75	31,554

BEE PRODUCTION.

New South Wales ..	283	29	254	..	..	254
Victoria ..	237	24	213	..	..	213
Queensland ..	33	5	28	..	..	28
South Australia ..	164	14	150	..	..	150
Western Australia ..	130	15	115	..	..	115
Tasmania ..	15	1	14	..	..	14
Total ..	862	88	774	..	..	774

TOTAL FARMYARD, DAIRY AND BEE PRODUCTION.

New South Wales ..	60,024	6,532	53,492	8,830	154	(b) 44,508
Victoria ..	65,565	3,236	62,329	8,594	1,800	51,935
Queensland ..	24,167	930	23,237	3,240	585	19,412
South Australia ..	14,023	575	13,448	1,723	696	11,029
Western Australia ..	9,389	721	8,668	2,294	1,109	5,265
Tasmania ..	6,520	358	6,162	1,999	208	(b) 3,955
Total ..	179,688	12,352	167,336	26,680	4,552	136,104

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

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

3. Net Value of Production, 1934-35 to 1951-52. In the following table the net values of farmyard, dairy and bee production (total and per head of population) are shown by States.

NET VALUE OF FARMYARD, DAIRY AND BEE PRODUCTION.(a)

Year.	N.S.W. (b)	Vic.	Q'land.	S. Aust.	W. Aust.	Tas.(b)	Total.
NET VALUE. (£'000.)							
Average, 1934-35 to 1938-39	11,848	12,238	7,118	1,938	979	943	35,064
1947-48.. .. .	25,692	26,087	15,029	7,035	2,460	1,718	78,021
1948-49.. .. .	28,991	30,335	17,443	7,366	2,897	2,225	89,257
1949-50.. .. .	33,943	35,643	19,537	9,140	3,326	2,484	104,073
1950-51.. .. .	38,852	39,650	21,141	8,513	3,886	2,755	114,797
1951-52.. .. .	44,508	51,935	19,412	11,029	5,265	3,955	136,104

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

Average, 1934-35 to 1938-39	4 8 3	6 12 2	7 4 7	3 5 11	2 3 0	4 0 10	5 2 11
1947-48.. .. .	8 10 10	12 12 2	13 10 2	10 15 8	4 16 8	6 11 4	10 5 0
1948-49.. .. .	9 9 3	14 7 1	15 7 5	11 1 6	5 11 0	8 5 11	11 9 0
1949-50.. .. .	10 14 0	16 8 6	16 15 11	13 6 2	6 1 11	8 19 1	12 19 9
1950-51.. .. .	11 17 6	17 14 6	17 14 6	11 19 6	6 16 0	9 11 8	13 17 6
1951-52.. .. .	13 5 3	22 11 4	15 17 11	15 2 5	8 18 2	13 4 11	16 0 4

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

(b) No deduction has been

4. Indexes of Quantity and Price of Farmyard, Dairy and Bee Production, 1947-48 to 1951-52.—For details of the methods of calculating these indexes and of the weights used see Chapter XXIX.—Miscellaneous.

INDEXES OF QUANTITY AND PRICE OF FARMYARD, DAIRY AND BEE PRODUCTION: AUSTRALIA.

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

Particulars.	1947-48.	1948-49.	1949-50.	1950-51.	1951-52.
Quantity produced—					
Milk	103	106	109	105	92
Other products	115	120	115	109	108
Total Farmyard and Dairy	107	111	111	106	97
Total per Head of Population	96	98	95	88	78
Price—					
Milk	178	189	220	244	319
Other products	195	216	248	295	363
Total Farmyard and Dairy	183	197	228	258	332

§ 3. Dairy Cattle and Dairy Products.

1. Dairy Herds.—Owing to the lack of uniformity in the schedules used by the several States in the collection of live-stock statistics, it is not possible to measure with precision the growth of the dairy herds of Australia prior to 1943. However, statistics of dairy cows, which provide a reliable measurement of this development, show that in 1918-19 there were 1,902,036 dairy cows (in milk and dry), compared with 2,345,070 in 1928-29 and 3,209,519 in 1938-39. The numbers remained at this level until March, 1944, but have since declined, the number recorded at 31st March, 1952 being 2,972,752. In New South Wales, Victoria, South Australia and Tasmania the proportion of dairy to all cattle is high. In Queensland, the Northern Territory and Western Australia there is a great preponderance of other cattle, the main object in these areas being the production of beef. Since 1939 there have been substantial decreases in the number of dairy cows in New South Wales and Queensland. The numbers of dairy cows for 1948 to 1952 shown in the following table refer to those recorded by farmers as being in milk and dry as at 31st March. The figures shown for the years 1935 to 1939 cover the same categories, but the period differs in some States (see footnote (a)). To this extent the figures lack comparability.

NUMBER OF CATTLE AND DAIRY COWS (IN MILK AND DRY).

State.	Average, 1935-39. (a)	31st March—					
		1948.	1949.	1950.	1951.	1952.	
N.S. Wales	All Cattle ..	3,054,164	3,129,740	3,252,752	3,440,461	3,702,848	3,620,953
	Dairy Cows ..	1,024,761	862,041	872,431	875,988	855,882	820,518
Victoria	All Cattle ..	1,892,465	2,174,203	2,224,543	2,230,948	2,216,253	2,214,530
	Dairy Cows ..	912,621	896,886	930,252	956,558	943,039	914,809
Queensland	All Cattle ..	6,047,726	5,975,460	5,991,797	6,304,778	6,733,548	6,434,374
	Dairy Cows ..	924,875	946,174	963,473	962,752	967,959	859,434
South Australia	All Cattle ..	331,488	445,287	461,686	464,141	432,566	437,468
	Dairy Cows ..	154,870	166,954	172,765	174,835	160,204	152,192
W. Australia	All Cattle ..	796,473	815,610	864,131	864,936	841,204	851,534
	Dairy Cows ..	121,127	132,305	133,219	129,365	127,544	130,625
Tasmania	All Cattle ..	260,267	244,107	266,419	274,740	271,784	266,263
	Dairy Cows ..	93,708	79,135	84,433	80,546	91,859	92,833
Nor. Territory	All Cattle ..	893,925	991,429	1,052,811	1,048,875	1,019,149	1,057,906
	Dairy Cows ..	(b)	(b)	(b)	(b)	(b)	(b)
Aust. Cap. Ter.	All Cattle ..	8,261	8,748	10,071	11,161	11,477	10,293
	Dairy Cows ..	1,019	1,770	1,937	2,391	2,184	2,341
Australia	All Cattle ..	13,284,769	13,784,584	14,123,610	14,640,040	15,228,829	14,893,321
	Dairy Cows ..	3,232,981	3,085,265	3,158,670	3,191,435	3,148,671	2,972,752

(a) As at 31st March for New South Wales and Australian Capital Territory; 1st March for Victoria; 1st January for Queensland, South Australia, Western Australia and Tasmania. (b) Not available.

In the next table the dairy cattle in each State are shown in various categories as at 31st March, 1950, 1951 and 1952. Information in this detail was not collected uniformly in all States prior to 1943.

NUMBER OF DAIRY CATTLE.

State.	31st March.	Dairy Cows.		Dairy Heifers 1 year and over.	Dairy Calves under 1 year.	Dairy Bulls.	Total Dairy Cattle.
		In Milk.	Dry.				
New South Wales	1950	693,203	182,785	210,851	162,067	24,097	1,273,003
	1951	672,871	183,011	204,056	161,991	23,827	1,245,756
	1952	632,718	187,800	201,604	159,435	23,313	1,204,870
Victoria	1950	715,327	241,231	298,563	231,104	38,958	1,525,183
	1951	674,011	269,028	281,795	227,203	37,356	1,489,393
	1952	655,127	259,682	275,987	210,758	36,969	1,438,523
Queensland	1950	693,413	269,339	234,317	207,726	27,965	1,432,760
	1951	666,398	301,551	229,800	215,070	27,369	1,440,198
	1952	572,448	286,986	224,350	185,990	26,876	1,295,659
South Australia	1950	118,263	56,572	50,827	37,358	8,328	271,348
	1951	105,765	54,439	42,341	33,483	7,597	243,625
	1952	103,658	48,534	40,166	36,718	7,499	236,575
Western Australia	1950	60,383	68,082	42,263	48,950	5,835	226,413
	1951	60,373	66,671	41,365	48,097	5,860	222,875
	1952	60,092	70,533	40,292	53,556	5,996	230,469
Tasmania	1950	71,985	17,561	27,065	36,168	4,280	157,959
	1951	71,633	20,226	27,148	33,926	4,091	157,024
	1952	73,329	19,504	26,007	32,749	3,947	155,536
Australian Capital Territory	1950	1,643	718	342	369	36	3,138
	1951	1,190	994	678	655	56	3,573
	1952	1,188	1,153	452	686	66	3,545
Australia	1950	2,354,217	837,218	865,128	723,742	109,499	4,889,804
	1951	2,252,741	895,930	827,183	720,425	106,165	4,802,444
	1952	2,098,560	874,192	808,858	679,901	104,666	4,566,177

A graph showing the distribution of dairy cattle in Australia at 31st March, 1948 appears on page 906 of Official Year Book No. 39.

2. **Size of Dairy Herds.**—A series of special tabulations relating to rural holdings, undertaken for all States for the year 1949-50, covered, *inter alia*, a classification of holdings with dairy cattle according to size of herd. Details of these tabulations are published in *Primary Industries Bulletin* No. 44, 1949-50.

3. **Factory System.**—(i) *General.* Cream separation and butter-making are often carried on together under the co-operative system. The creation of large central butter factories has resulted in a considerable reduction in the cost of manufacture, since improved appliances such as refrigerators, etc., may be profitably worked at the larger establishments. The product is also of a more uniform quality, and few farmers prefer to convert to cream rather than send milk to the factory. Formerly, the average quantity of milk used per pound of hand-made butter was about 3 gallons, but factory butter requires less than 2½ gallons.

(ii) *Number of Factories.* In 1951-52 the factories in Australia for the manufacture of butter, cheese and condensed milk numbered 399 and were distributed among the States as follows:—New South Wales, 90; Victoria, 139; Queensland, 91; South Australia, 42; Western Australia, 14; and Tasmania, 23. More details regarding numbers of factories, output, etc., are given in Chapter XXIV.—Manufacturing Industry.

4. **Butter and Cheese—Stabilization Schemes.**—(i) *Voluntary Plan.* During the period from January, 1926 to April, 1934, a voluntary scheme known as the "Paterson Plan" was in operation and had the effect of stabilizing the price of butter in Australia. Details of this scheme may be found on page 1028 of Official Year Book No. 38 and in earlier issues.

(ii) *Compulsory Plan.* On 1st May, 1934 the "Paterson Plan" was superseded by a compulsory price equalization plan, details of which were shown on page 1029 of Official Year Book No. 38 and earlier issues. This compulsory plan was invalidated by the decision in 1936 of the Privy Council which declared in the James (Dried Fruits) Case that the Commonwealth had no power under the Constitution to regulate trade between the States.

(iii) *Equalization Scheme.* Since the Privy Council decision, the butter price stabilization scheme has continued to operate by voluntary action based on the agreements between the manufacturers and the Commonwealth Dairy Produce Equalization Committee Limited. The Committee, which comprises members of the State Dairy Products Boards and other persons representing the industry, enters into agreements with manufacturers to secure to them equal rates from sales of butter and cheese, and for this purpose may fix basic prices at which these products sold in Australia or abroad are to be taken into account. The effect is that local and export trade are distributed in equitable proportions among the manufacturers by means of quotas. The Committee fixes basic prices and equalizes returns to factories through an Equalization Fund. The States originally participating in the scheme were New South Wales, Victoria, Queensland and Tasmania in respect of both butter and cheese, and South Australia in respect of cheese. South Australia and Western Australia entered the scheme in respect of butter on 1st April, 1946 and Western Australia extended its participation to include cheese in January, 1947.

The home consumption prices of butter and cheese were fixed by the Commonwealth Prices Commissioner up to 19th September, 1948, from which date prices have been controlled by State Governments.

5. **Commonwealth Subsidies.**—(i) *Butter, Cheese and Processed Milk Products.* Under the provisions of the various Dairy Industry Assistance Acts, the first of which was passed in 1942, the Commonwealth Government has provided subsidies on milk supplied for the manufacture of butter, cheese and processed milk products. Subsidies were paid on a seasonal basis prior to 1st April, 1946, but from that date have been on a flat rate basis. Subsidies are distributed by the Commonwealth Dairy Produce Equalization Committee Limited through factories to milk producers by payments on butter, cheese and processed milk products manufactured. Subsidy on milk supplied for the manufacture of processed milk products was discontinued from 1st July, 1948 to 30th June, 1949 and again from 1st July, 1952.

The following table shows particulars, in respect of butter and cheese, of the rates realized on local, interstate and oversea sales and the average equalization and subsidy rates in operation for the years ended June, 1939 and 1949 to 1953.

BUTTER AND CHEESE : RATES REALIZED ON SALES, AVERAGE EQUALIZATION RATES AND RATES OF COMMONWEALTH SUBSIDY UNDER DAIRY INDUSTRY ASSISTANCE ACTS.

(Rates s. d. per cwt.)

Year ended 30th June.	Rates Realized on Sales.			Average Equalization Rate.	Rate of Subsidy.	Rate of Overall Return to Manu- facturers.
	Local.	Interstate.	Overseas.			
BUTTER.						
1939.. ..	154 5.5	146 5.5	121 7.5	136 3.5	..	136 3.5
1949.. ..	209 9.0	197 3.5	267 0.6	237 6.7	28 11.3	266 6.0
1950.. ..	209 9.6	196 2.0	293 2.4	248 11.2	43 11.2	292 10.4
1951.. ..	208 6.4	193 11.9	307 11.2	241 8.4	82 3.9	324 0.3
1952.. ..	(a)	(a)	(a)	b329 0.0	b100 1.1	429 1.1
1953.. ..	(a)	(a)	(a)	b393 0.0	b 85 0.0	b478 0.0
CHEESE.						
1939.. ..	(c) 94 8.6		59 3.2	71 7.6	..	71 7.6
1949.. ..	123 7.0		148 7.9	138 1.0	11 3.9	149 4.9
1950.. ..	122 9.5		162 3.3	141 4.8	23 10.9	165 3.7
1951.. ..	123 9.8		171 4.2	144 1.6	37 10.9	182 0.5
1952.. ..	(a)		(a)	b204 6.1	b 35 10.1	240 4.2
1953.. ..	(a)		(a)	b230 0.0	b 32 0.0	b262 0.0

(a) Not yet available. (b) Interim rates. (c) Lower rates were determined for cheese sold in these years for processing for local consumption.

(Source : Commonwealth Dairy Produce Equalisation Committee Limited.)

Following representations by industry organizations, the Commonwealth Government established the Joint Dairy Industry Advisory Committee in November, 1946, comprising a chairman nominated by the Government, four representatives of Commonwealth Government Departments and four industry representatives from the several States. The Committee's functions, broadly, are to advise and assist in conducting cost and other surveys of dairy farm production and to act as an advisory body to the Government in these matters. Since 1st April, 1947, the rates of overall return to milk producers determined by the Commonwealth Government for the purpose of subsidy payments have been based on recommendations made by the Committee following surveys of production costs in the dairy industry.

Under the Five-year Stabilization Plan which came into operation on 1st July, 1952, the Commonwealth Government, with the approval of the States, determines each season the ex-factory prices of butter and cheese, guarantees to dairy farmers a return, based upon costs of efficient production, in respect of quantities of butter and cheese sold within the Commonwealth, plus an additional 20 per cent. (if produced), and hence determines the amount of subsidy it will make available to lift the return on that part of output covered by the guarantee to the guaranteed level.

Amounts realized on exports of butter and cheese in excess of the f.o.b. equivalent of the guaranteed return have been credited to the Dairying Industry Stabilization Fund, which was established in July, 1948 for the purpose of stabilizing returns from exports. During 1951-52 the Stabilization Fund met the deficiency in respect of all exports which did not return sufficient to meet the basic return to the factory. Since 1st July, 1952, it has been available to the industry to be used, in whatever manner considered desirable by it, to make good any deficiency in respect of all exports other than the 20 per cent. provided for under the Commonwealth Government's Five-year Stabilization Plan. After allowing for outstanding debits the amount standing to the credit of the Dairying Industry Stabilization Fund at 30th June, 1952 totalled approximately £2,500,000.

(ii) *Whole Milk.* In addition to the subsidies referred to above, the Commonwealth Government has also subsidized the production of whole milk consumed directly. The subsidy rates varied according to States, regions within the State and the seasonal period. Commonwealth subsidy on whole milk was paid during the year 1948-49 in respect of milk supplied up to 30th September, 1948, but was discontinued after that date. Details of the amounts distributed during each year will be found in Official Year Book No. 38, page 1031.

6. Total Dairy Production.—The dairy production for each State in 1951-52 is shown below :—

DAIRY PRODUCTION, 1951-52.

Particulars.	N.S.W.	Victoria.	Q'land.	S. Aust.	W. Aust.	Tas.	A.C.T.	Total.
MILK ('000 GAL.).								
Used for—								
Butter ..	(a) 123,544	(b) 278,471	(c) 129,317	35,465	29,480	34,452	42	630,771
Cheese ..	4,562	47,472	10,442	22,618	1,389	878	..	87,360
Condensing and concentrating	13,693	53,456	41,389	28,399	18,068	10,770	..	76,324
Other purposes ..	99,410	67,419							551	256,832
Total ..	241,209	446,818	181,148	86,482	48,937	46,100	593	1,051,287
BUTTER (TONS).								
In Factories On Dairy and other Farms(g)	(d) 23,438	(e) 59,236	(f) 27,850	7,767	6,705	6,170	..	131,166
	1,804	1,106	361	364	175	337	6	4,153
Total ..	25,242	60,342	28,211	8,131	6,880	6,507	6	135,319
CHEESE (TONS).								
In Factories On Dairy and other Farms(g)	1,995	22,240	(h) 4,700	10,615	624	408	..	40,582
	..	15	..	..	1	..	..	16
Total ..	1,995	22,255	4,700	10,615	625	408	..	40,598

(a) Includes 3,590,000 gallons of milk, the produce of New South Wales, sent as cream to factories in Victoria and Queensland. (b) Includes 562,000 gallons of milk, the produce of Victoria, sent as cream to New South Wales. (c) Includes 595,000 gallons of milk, the produce of Queensland, sent as cream to New South Wales. (d) Includes 251 tons of butter made from cream, the produce of Victoria and Queensland. (e) Includes 695 tons of butter made from cream, the produce of New South Wales. (f) Includes 78 tons of butter made from cream, the produce of New South Wales. (g) Estimated. (h) Includes 16½ tons of cheese made in establishments not classified as factories.

7. *Whole Milk.*—(i) *Production and Utilization.* During the five years ended 1938-39 approximately 80 per cent. of Australia's milk supply was used for butter-making, 4 per cent. for cheese manufacture. 2 per cent. for condensary products and 14 per cent. for fluid consumption and other purposes. There has since been a considerable decline in the proportion of milk used for butter-making, with corresponding increases in the quantities used for other purposes. In 1951-52, 60.0 per cent. of the total milk supply was used for butter, 8.3 per cent. for cheese, 7.3 per cent. for condensary products and 24.4 per cent. for other purposes.

Details of the production of whole milk for various purposes are shown in the following table for each year 1947-48 to 1951-52 in comparison with the average for the years 1934-35 to 1938-39:—

PRODUCTION AND UTILIZATION OF WHOLE MILK : AUSTRALIA.
(^{'000} gallons.)

Year.	Total Production.	Quantity used for—			
		Butter (Factory and Farm).	Cheese (Factory and Farm).	Condensary Products.	Other purposes.
Average, 1934-35 to 1938-39	1,149,559	913,754	48,595	28,116	159,094
1947-48	1,173,105	763,049	90,121	78,113	241,822
1948-49	1,212,644	781,230	93,720	87,653	250,041
1949-50	1,241,759	806,682	96,757	89,565	248,755
1950-51	1,199,716	762,692	96,532	84,828	255,664
1951-52	1,051,287	630,771	87,360	76,324	256,832

In the following table, particulars of production of whole milk in the several States are shown for the years 1947-48 to 1951-52, compared with the average for the five years ended 1938-39. Victoria is the principal milk-producing State and in 1951-52 output from that State, viz., 446.8 million gallons, represented 42.5 per cent. of total production. Output from New South Wales was 241.2 million gallons or 22.9 per cent. of the total and that of Queensland 181.1 million gallons (17.2 per cent.) Production in the remaining States accounted for 17.4 per cent. of the total Australian output.

TOTAL PRODUCTION OF WHOLE MILK.
(^{'000} gallons.)

Year.	N.S.W.	Vic.	Q'land.	S. Aust.	W. Aust.	Tas.	A.C.T.	Total.
Average, 1934-35 to 1938-39 ..	331,963	402,447	278,226	63,538	40,394	32,659	332	1,149,559
1947-48	295,370	428,569	272,791	92,498	50,363	32,936	578	1,173,105
1948-49	291,915	462,446	277,152	91,319	50,612	38,541	659	1,212,644
1949-50	311,580	469,253	281,125	89,388	49,476	40,243	694	1,241,759
1950-51	298,159	445,671	278,111	83,545	52,407	41,136	687	1,199,716
1951-52	241,209	446,818	181,148	86,482	48,937	46,100	593	1,051,287

(ii) *Production per Cow.* The annual quantity of milk produced per dairy cow reaches as high as 1,000 gallons, varying greatly with breed, locality and season. For the whole of Australia for all dairy cows and for all seasons prior to 1916 it averaged considerably less than 300 gallons per annum. In recent years not only has there been an improvement in the quality of the cattle, but the application of scientific methods has been continually extended, and the 300-gallon average has been exceeded in each year since 1924, the yield of 392 gallons in 1931 constituting a record. In 1951-52 the yield was 343 gallons. The annual average yields per cow shown in the following table are based on the number of dairy cows which were in milk during any part of the year. The average shown is, therefore, less than that for cows which were yielding during the greater

part of the year. It should be noted that there are many difficulties attending the collection of particulars of the total quantity of milk obtained during any year. In addition, there is the further difficulty of ascertaining with reasonable accuracy the average number of cows in milk during the same period. The average yield per cow shown hereunder may be accepted as sufficiently reliable to show the general trend :—

MILK PRODUCTION.

Heading.	N.S.W.	Vic.	Q'land.	S. Aust.	W. Aust.	Tas.	A.C.T.	Aust.
Average, 1934-35 to 1938-39—								
Dairy Cows(a) No.	1,030,441	913,635	909,006	154,349	120,767	93,764	958	3,222,920
Production '000 gal.	331,963	402,447	278,226	63,538	40,394	32,659	332	1,149,559
Av. per cow .. gal.	322	440	306	412	334	348	347	357
1947-48—								
Dairy Cows(a) .. No.	855,874	887,045	929,915	165,473	132,008	77,127	1,761	3,049,203
Production '000 gal.	295,370	428,569	272,791	92,498	50,363	32,936	578	1,173,105
Av. per cow .. gal.	345	483	293	559	382	427	328	385
1948-49—								
Dairy Cows(a) .. No.	867,236	913,569	954,824	169,909	132,762	81,784	1,854	3,121,938
Production '000 gal.	291,915	462,446	277,152	91,319	50,612	38,541	659	1,212,644
Av. per cow .. gal.	337	506	290	537	381	471	355	388
1949-50—								
Dairy Cows(a) .. No.	874,210	943,405	963,113	173,850	131,292	86,989	2,164	3,175,023
Production '000 gal.	311,580	469,253	281,125	89,388	49,476	40,243	694	1,241,759
Av. per cow .. gal.	356	497	292	514	377	463	321	391
1950-51—								
Dairy Cows(a) .. No.	865,935	949,798	965,355	167,519	128,455	90,703	2,288	3,170,053
Production '000 gal.	298,159	445,671	278,111	83,545	52,407	41,136	687	1,199,716
Av. per cow .. gal.	344	469	288	499	408	454	300	378
1951-52—								
Dairy Cows(a) .. No.	838,200	928,924	913,696	156,198	129,085	92,346	2,263	3,060,712
Production '000 gal.	241,209	446,818	181,148	86,482	48,937	46,100	593	1,051,287
Av. per cow .. gal.	288	481	198	554	379	499	262	343

(a) Mean for the year.

8. Butter Production.—There was a steady increase in the annual output of butter for many years prior to the 1939-45 War. The average annual production rose from 126,000 tons for the five years ended 1928-29 to 195,000 tons for the five years ended 1938-39.

Following the record output of 211,988 tons in 1939-40 the general trend of butter production declined until 1946-47, when 143,308 tons were produced. Output increased again to 173,599 tons in 1949-50, but in 1950-51 decreased to 163,934 tons and in 1951-52 to 135,319 tons. The foregoing figures include butter produced on farms which has shown a decline from 8,714 tons in 1938-39 to 4,153 tons in 1951-52.

The following table shows production of butter in factories in each State for the years 1947-48 to 1951-52, compared with the average for the five years ended 1938-39.

BUTTER PRODUCTION IN FACTORIES.

(Tons.)

Year.	N.S.W.	Vic.	Q'land.	S. Aust.	W. Aust.	Tas.	Aust.(a)
Average, 1934-35 to 1938-39 ..	52,949	62,489	53,255	7,570	5,459	3,811	185,533
1947-48 ..	33,958	56,717	46,454	9,043	7,061	4,441	157,674
1948-49 ..	33,267	60,039	47,197	8,800	6,966	4,821	161,090
1949-50 ..	36,817	63,358	48,196	8,236	6,769	5,069	168,445
1950-51 ..	34,318	57,982	47,447	7,377	6,797	5,710	159,631
1951-52 ..	23,438	50,236	27,850	7,767	6,705	6,170	131,166

(a) Northern Territory and Australian Capital Territory : nil.

The table below shows the monthly production of factory butter in Australia in each of the years 1938-39 and 1947-48 to 1951-52. The annual output of farm butter is also shown.

PRODUCTION OF BUTTER IN FACTORIES AND ON FARMS : AUSTRALIA.
(Tons.)

Particulars.	1938-39.	1947-48.	1948-49.	1949-50.	1950-51.	1951-52.
Factories—						
July	9,415	7,830	7,892	7,393	7,338	7,013
August	11,645	8,901	10,411	10,169	10,355	9,119
September	15,531	12,813	13,335	13,903	14,417	11,511
October	20,485	17,282	17,487	19,083	19,897	16,748
November	22,561	17,432	18,166	21,524	21,245	16,051
December	20,710	20,601	18,481	21,334	20,629	13,889
January	15,872	19,334	17,101	17,389	18,181	12,337
February	15,816	13,708	14,246	14,725	13,791	9,501
March	17,729	13,486	15,380	15,126	12,619	10,197
April	16,583	10,098	12,153	11,146	8,841	9,132
May	15,568	8,632	9,139	9,484	6,584	8,219
June	12,871	7,380	7,299	7,169	5,734	7,449
Factory Total(a)	194,587	157,587	161,090	168,445	159,631	131,166
Made on Farms(b)	8,714	4,467	4,740	5,154	4,393	4,153
Grand Total	203,054	162,054	165,830	173,599	163,934	135,319

(a) Year ended June.

(b) Year ended March.

9. **Cheese Production.**—Until 1916 the annual production of cheese had not reached 10,000 tons. From 1916 to 1926-27 it ranged between 10,000 and 13,000 tons with two years (1921 and 1924) having more than 14,000 tons. For the next five years between 13,500 and 14,800 tons were produced each year. In 1932-33 production rose to 16,488 tons, and, with some reversals of trend, continued to rise and reached the record output of 44,796 tons in 1949-50. Production decreased slightly in 1950-51 and more substantially in 1951-52 to 40,582 tons. The States contributing chiefly towards the general increase over the years are Victoria, Queensland and South Australia.

The following table shows production of cheese in factories in each State in the years 1947-48 to 1951-52 in comparison with average output during the years 1934-35 to 1938-39 :—

CHEESE PRODUCTION IN FACTORIES.
(Tons.)

Year.	N.S.W.	Vic.	Q'land.	S. Aust.	W. Aust.	Tas.	Aust.(a)
Average, 1934-35 to							
1938-39	3,332	6,177	5,071	5,437	390	1,210	21,617
1947-48	2,637	16,167	9,641	11,530	1,019	447	41,441
1948-49	2,490	18,352	9,390	11,654	870	404	43,160
1949-50	2,827	21,193	9,050	10,587	701	418	44,776
1950-51	2,960	22,570	8,678	8,932	748	412	44,300
1951-52	1,995	22,240	4,700	10,615	624	408	40,582

(a) Northern Territory and Australian Capital Territory : Nil.

The monthly production of cheese in factories in Australia, together with the annual output from farms, is shown in the table below for 1938-39 and each of the years 1947-48 to 1951-52.

PRODUCTION OF CHEESE IN FACTORIES AND ON FARMS: AUSTRALIA.
(Tons.)

Month.	1938-39.	1947-48.	1948-49.	1949-50.	1950-51.	1951-52.
Factories—						
July	1,517	2,393	2,951	1,995	1,654	2,135
August	1,950	3,047	3,143	3,104	3,020	3,050
September	2,820	4,259	4,572	4,625	5,064	4,666
October	4,028	5,703	5,978	6,265	6,975	6,290
November	3,990	5,760	5,802	6,525	7,175	6,112
December	3,462	5,343	5,317	6,208	6,175	5,158
January	2,212	4,463	4,257	4,591	4,441	3,715
February	1,715	2,864	2,997	3,175	2,783	2,442
March	1,826	2,428	3,165	2,833	2,612	2,165
April	1,656	1,698	2,446	2,316	1,635	1,682
May	1,898	1,795	1,854	1,790	1,325	1,565
June	1,900	1,688	1,578	1,349	1,442	1,602
Factory Total(a) ..	28,974	41,441	43,160	44,776	44,301	40,582
Made on Farms(b) ..	330	37	42	20	9	16
Grand Total	29,304	41,478	43,202	44,796	44,310	40,598

(a) Year ended June.

(b) Year ended March.

10. **Condensed, Concentrated and Powdered, etc. Milk Production.**—The manufacture of these products has expanded greatly since 1938-39—to meet the needs of the Services during the 1939-45 War and for export purposes since the war. The output of condensed milk (sweetened and unsweetened) in 1951-52 was 202 per cent. higher than in the three years ended 1938-39 while that of powdered milk (full cream and skim) was 175 per cent. higher. Over the same period the quantity of whole milk used in the manufacture of the products shown below increased from 33.2 million gallons to 78.3 million gallons or by 136 per cent. These products are manufactured mainly in Victoria, which produced 70 per cent. of the total (in terms of whole milk equivalent) in 1951-52. New South Wales accounted for 18 per cent. and the remaining States for 12 per cent.

The following table shows details of the output of condensed, concentrated, powdered, etc. milk during the years 1947-48 to 1951-52, compared with the available details for the years 1936-37 to 1938-39.

PRODUCTION OF CONDENSED, CONCENTRATED AND POWDERED, ETC., MILK : AUSTRALIA.

Year.	Full Cream Milk Products.				Total Whole Milk Equivalent of Full Cream Milk Products.	Milk By-Products.	
	Condensed Milk (Sweetened and unsweetened).	Concentrated Whole Milk.(a)	Powdered Full Cream Milk.	Infants' and Invalids' Foods (Including Malted Milk and Milk Sugar).		Skim Milk.	Powdered Butter-milk and Whey.
	Tons.	Tons.	Tons.	Tons.	'000 Gals.	Tons.	Tons.
Average, 1936-37 to 1938-39	17,347	(b) 1,355	9,464	(c) 1,131	33,226	(d)	(e) 701
1947-48	45,595	13,444	16,015	9,452	78,113	4,379	3,411
1948-49	47,773	13,177	19,768	10,104	87,653	6,116	3,019
1949-50	49,767	17,270	22,539	10,531	89,565	9,393	2,989
1950-51	50,507	18,351	17,594	12,100	84,828	6,583	3,192
1951-52	52,467	16,743	15,177	12,066	78,295	10,887	2,938

(a) Mainly for ice-cream manufacture. (b) Incomplete. (c) Malted milk and milk sugar only. (d) Not available separately; included with Powdered Full Cream Milk. (e) Excludes Powdered Whey.

11. **Local Consumption of Butter and Cheese.**—The production of butter and cheese less net exports and adjusted to account for movements in stocks, represents the quantity available for consumption in Australia.

A system of butter rationing introduced as a war-time measure and retained until 16th June, 1950, had the effect of considerably reducing civilian consumption. In the last year of rationing, 1949–50, consumption was 25.3 lb. per head per annum compared with an average of 32.9 lb. during the years 1936–37 to 1938–39. In 1950–51, following the cessation of rationing, consumption rose sharply to 30.9 lb. per head and in 1951–52 rose still further to 31.2 lb.

Cheese consumption rose considerably during the period of butter rationing, from 4.4 lb. per head pre-war to 6.3 lb. per head in 1949–50. There was a further slight rise in 1950–51 to 6.5 lb. per head, but this was followed by a decline in 1951–52 to 6.0 lb. per head.

The following table shows details of the production and disposal of butter and cheese for each of the years 1948–49 to 1951–52 compared with the average for the years 1936–37 to 1938–39.

PRODUCTION AND DISPOSAL OF BUTTER AND CHEESE : AUSTRALIA.
(’000 tons.)

Year.	Changes in Stock.	Production.	Exports. (a)	Consumption in Australia.	
				Total.	Per Head per annum.
BUTTER.					
Average, 1936–37 to 1938–39	(b)	191.0	(c) 90.0	101.0	lb. 32.9
1948–49.. .. .	(d) –2.1	165.8	83.4	84.5	24.3
1949–50.. .. .	(d) +0.8	173.6	81.9	90.9	25.3
1950–51.. .. .	(d) –5.9	163.9	55.2	114.6	30.9
1951–52.. .. .	(d) +3.5	135.3	12.9	118.9	31.2
CHEESE.					
Average, 1936–37 to 1938–39	(b)	24.9	11.5	13.4	lb. 4.4
1948–49.. .. .	– 0.7	43.2	26.2	17.7	5.1
1949–50.. .. .	– 1.0	44.8	23.1	22.7	6.3
1950–51.. .. .	..	44.3	20.1	24.2	6.5
1951–52.. .. .	..	40.6	17.9	22.7	6.0

(a) Figures for butter include ghee expressed as butter as well as butter shipped as ships' stores. Figures for cheese include ships' stores after allowance for a small quantity of cheese imported. (b) Not available. (c) Excludes ghee. (d) Includes allowance for movements in stocks other than those held in main cold stores.

12. **Marketing of Dairy Products.**—(i) *The Dairy Produce Export Control Act 1924–47.* Introduced at the request of the dairying industry this Act was passed by the Commonwealth Parliament with the object of organizing the overseas marketing of Australian dairy produce. A Dairy Produce Control Board was appointed and was in existence from 1924 to 1935. It dealt with matters relating to the organization and supervision of overseas marketing of dairy produce. In the course of its functions the Board regulated shipments to ensure regularity of supply in the London market, controlled forward selling, obtained reductions in overseas freights and insurance rates and participated in an advertising campaign in the United Kingdom.

Prior to the appointment of the Dairy Produce Control Board a voluntary body—the Australian Dairy Council—was established to advise and make recommendations to the Governments on problems connected with the production, manufacture and quality of dairy produce, pasture improvement and diseases of dairy cattle.

Following a recommendation by the Australian Agricultural Council the functions of these bodies were combined by an amending Act of 1935 under the Australian Dairy Produce Board and provision was made for the allocation of money from the Board's funds for research and investigation into pastures, diseases of dairy cattle and the quality of butter. The functions of the Board were later extended to enable it to advise the Government in connexion with the transport of dairy produce, the securing of new markets, the expansion of existing markets and other matters.

The Australian Dairy Produce Board was re-constituted in 1947 by an amendment to the Dairy Produce Export Control Act, reducing its membership from seventeen to twelve. The functions of the Board were extended to enable it to purchase and sell, on behalf of the Commonwealth, dairy produce intended for export, and to control all matters concerning the handling, storage, protection, treatment, transfer and shipment of the produce so purchased or sold. In 1953 the direct farmer representation on the Board was increased from two to three members thus raising the total membership from twelve to thirteen.

(ii) *The Dairy Produce Export Charges Act 1924-1937.* This Act provides for the imposition of a levy on all butter and cheese exported from Australia to cover the administrative expenses of the Board and for advertising and other purposes. The rate of the levy is fixed by regulation.

13. **Butter and Cheese Contracts.**—(i) *General.* Details of the war-time contracts arranged between the United Kingdom and Australian Governments whereby the former undertook to purchase Australia's surplus butter and cheese were shown on pp. 985 and 986 of Official Year Book No. 37. The purchase of butter and cheese in 1944-45 and subsequent years has been covered by the Long-Term Purchase Agreement (*see sub-par. (ii) following*).

For the years 1943-44 to 1947-48 the United Kingdom Government reimbursed the Australian Government to the extent of subsidy paid on butter and cheese exported on Ministry of Food account. From 1st July, 1948 to 30th November, 1950 in respect of butter, and for the year 1948-49 in the case of cheese, however, contract prices paid by the United Kingdom Government were in excess of the basic return to the Australian manufacturer. As a result, subsidy on butter and cheese exported was discontinued from that date and returns from export sales in excess of the basic return to the producer have been credited to the Dairying Industry Stabilization Fund (*see par. 5 (i) ante*). The Fund was drawn upon to cover the deficiencies in export prices during 1951-52 and since July, 1952 has been available to make good the deficiency in respect of all exports other than the 20 per cent. provided for under the Five-year Stabilization Plan.

The following table indicates the prices per cwt. Australian currency f.o.b. part of shipment payable under the Long-term Purchase Agreement for the various grades of butter and cheese for the years 1946-47 to 1952-53.

PRICES OF BUTTER AND CHEESE : UNITED KINGDOM CONTRACTS.

per cwt. Australian Currency, f.o.b. .

(s. d.)

Period.	Choice.	1st.	2nd.	Pastry.	Whey, 1st.	Whey, 2nd.	Whey, Pastry.
BUTTER.							
1946-47	216 10½	215 4	210 7½	206 10½	206 10½	201 10½	196 10½
1947-48	254 4½	252 10	248 1½	244 4½	244 4½	239 4½	234 4½
1948-49	291 10½	290 3½	285 7½	281 10½	281 10½	276 10½	271 10½
1949-50	313 9	312 4	307 6	303 9	303 9	298 9	293 9
1950-51	339 4½	337 9½	307 6	303 9	303 9	298 9	293 9
1951-52	365 0	363 5½	352 6	347 6	272 0	267 0	262 0
1952-53	392 6	390 11½	380 0	367 6	367 6	361 3	355 0

PRICES OF BUTTER AND CHEESE: UNITED KINGDOM
 CONTRACTS—*continued.*
 (s. d.)

Period.						Choicest, 1st.	2nd.	3rd.
CHEESE.								
1946-47	..	..	..	..	..	126 3	123 9	121 3
1947-48	..	..	..	..	..	145 7½	143 1½	140 7½
1948-49	..	..	..	..	..	164 4½	161 10½	159 4½
1949-50	..	..	..	..	..	175 0	172 6	170 0
1950-51	..	..	..	..	..	188 9	172 6	170 0
1951-52	..	..	..	..	..	201 10½	189 4½	176 10½
1952-53	..	..	..	..	..	220 0	207 6	195 0

(ii) *Long-term Purchase Agreement.* Early in 1945 an agreement was completed between the United Kingdom and Australian Governments covering the sale to the former of Australia's surplus butter and cheese for the four years 1944-45 to 1947-48. The Agreement was later extended to cover the period up to 30th June, 1955. In the original agreement, prices were stipulated for the initial two years ended June, 1946, while any variation in price for the succeeding years was not to exceed 7½ per cent. of the price paid for the preceding year. In accordance with the terms of the agreement, prices were increased for the year 1946-47 and further increases were agreed upon for the years 1947-48 to 1950-51 following representations from the Australian Government after having considered recommendations by the Joint Dairy Industry Advisory Committee (*see par. 5 above*). The United Kingdom undertakes responsibility for storage costs if unable to provide ships to lift butter and cheese from store after 90 days, and makes advances against stored stock in this event. The usual provisions relative to quality, packing, etc., continued to obtain, but in regard to payment the United Kingdom now pays the whole of the value on shipment, instead of 97½ per cent. on shipment and 2½ per cent. 60 days after the date of the last bill of lading, as formerly.

14. *Oversea Trade in Butter, Cheese and Milk.*—(i) *General.* The production of butter and cheese in Australia is considerably in excess of local requirements and consequently a substantial surplus is available for export overseas. In normal circumstances the extent of this surplus is chiefly dependent upon the seasonal conditions. Exports of butter, which averaged 90,000 tons in the three-pre-war years, were maintained to a certain extent during the war-time and post-war years by the restriction of supplies for local consumption, but, because of lower production they nevertheless fell as low as 41,800 tons in 1944-45. In the last year of rationing, 1949-50 exports were 81,900 tons, but in 1950-51 they fell to 55,200 tons and in 1951-52 to 12,900 tons. Exports of cheese, which averaged 11,500 tons pre-war rose to a maximum of 26,100 tons in 1948-49, but they subsequently fell and in 1951-52 amounted to 17,900 tons.

During 1938-39, 96,900 tons or 95 per cent. of all butter exported, was shipped to the United Kingdom. With the decline in total exports there has also been a substantial reduction in the quantity shipped to the United Kingdom. In 1951-52 it amounted to only 4,500 tons (39 per cent. of total exports).

In 1938-39, exports of cheese totalled 16,000 tons of which 15,500 tons or 97 per cent. were exported to the United Kingdom. Of the total of 18,000 tons exported in 1951-52 13,200 tons or 73 per cent. were shipped to the United Kingdom.

Total quantities and values of exports of Australian origin of butter, cheese and condensed, concentrated, etc., milk and cream are shown on page 933.

(ii) *Butter and Cheese Exports graded according to Quality.* All butter and cheese exported comes under the provisions of the Exports (Dairy Produce) Regulations and is subject to the supervision, inspection and examination of officers appointed for that purpose. These commodities are graded according to quality which has been fixed by

regulation as follows :—Flavour and aroma, 50 points ; texture, 30 points ; and condition, 20 points. Butter and cheese graded at 93 to 100 points is of choicest quality ; at 90 to 92 points, first quality ; at 86 to 89 points, second quality ; and at 80 to 85 points, pastry or cooking quality or, in the case of cheese, third quality.

In the following table particulars are given of the relative proportions of butter and cheese graded for export according to quality. Further details, which include actual quantities by States, are to be found in *Primary Industries Bulletin* No. 46, *Part I.—Rural Industries, 1951–52.*

BULK BUTTER AND CHEESE GRADED FOR EXPORT : AUSTRALIA.
(Per Cent.)

Grade.	Butter.			Cheese.		
	1949–50.	1950–51.	1951–52.	1949–50.	1950–51.	1951–52.
Choicest	55.31	50.31	56.40	2.71	2.81	3.41
First Quality	37.92	40.67	34.28	67.10	68.48	70.74
Second Quality	5.73	7.25	7.27	30.19	28.71	25.85
Third Quality(b)	1.04	1.77	2.05	(a)	(a)	(a)
Total	100.00	100.00	100.00	100.00	100.00	100.00

(a) Included with Second Quality.

(b) Includes rejected.

§ 4. Pigs and Pig Products.

1. Pigs.—Between 1928–29 and 1938–39 the number of pigs in Australia fluctuated around one million. In the latter year an upward movement commenced and continued until the record number of 1,797,340 was recorded in 1940–41. There was a decline in the following two years but the numbers rose again to 1,746,721 in 1943–44 ; thereafter, there has been an almost continuous decline, the year 1950–51 being the exception, to the figure for 1951–52 of 1,022,124. Details of the number of pigs by States for each of the five years 1948 to 1952, together with the average for the five years 1935 to 1939, are given in the following table.

NUMBER, OF PIGS.

As at 31st March.	N.S.W.	Vic.	Qld.	S. Aust.	W. Aust.	Tas.	N.T.(a)	A.C.T.	Total.
Average, 1935 to 1939(b) ..	391,874	287,140	294,777	80,548	83,999	42,772	479	544	1,182,133
1948	365,171	271,492	378,102	100,343	93,180	45,149	680	566	1,254,683
1949	375,212	223,823	407,322	71,427	80,689	36,996	384	468	1,196,321
1950	333,198	212,901	391,836	69,523	79,126	35,841	419	423	1,123,267
1951	316,833	237,127	374,991	67,517	89,910	45,446	1,122	642	1,133,588
1952	292,829	213,670	316,529	64,903	86,224	46,926	794	249	1,022,124

(a) As at 1st January. (b) As at 31st March for New South Wales and Australian Capital Territory ; 1st March for Victoria ; 1st January for Queensland, South Australia, Western Australia and Tasmania.

A more accurate index of the development of pig-raising in Australia is provided in the following table, which shows for each of the years 1938–39 to 1951–52, the number of slaughterings together with the total number recorded.

NUMBER OF PIGS AND NUMBER SLAUGHTERED^(a): AUSTRALIA.

Year.	Number of Pigs. ^(b)	Number Slaughtered.	Year.	Number of Pigs. ^(b)	Number Slaughtered.
1938-39 ..	1,155,591	1,829,392	1945-46 ..	1,425,709	1,650,926
1939-40 ..	1,455,341	1,949,582	1946-47 ..	1,273,011	1,591,627
1940-41 ..	1,797,340	2,335,801	1947-48 ..	1,254,683	1,550,163
1941-42 ..	1,414,920	2,581,859	1948-49 ..	1,196,321	1,675,807
1942-43 ..	1,563,000	2,072,921	1949-50 ..	1,123,267	1,556,918
1943-44 ..	1,746,721	1,841,198	1950-51 ..	1,133,588	1,516,270
1944-45 ..	1,630,855	1,922,388	1951-52 ..	1,022,124	1,487,695

(a) The numbers slaughtered relate to slaughterings for human consumption. (b) For dates of enumeration see previous table.

Further details relating to pig numbers are given in Chapter XIX.—Pastoral Production. A graph showing the distribution of pigs in Australia at 31st March, 1948, appears on p. 908 of Official Year Book No. 39.

2. Size of Pig Herds.—A series of special tabulations relating to rural holdings undertaken for all States for the year 1949-50 covered, *inter alia*, a classification of holdings carrying pigs according to size of herd. Full details of these tabulations are published in *Primary Industries Bulletin* No. 44, 1949-50.

3. Pork.—(i) *Production*. In the following table details of the production of pork in each State are shown for the years 1947-48 to 1951-52 compared with average production during the years 1934-35 to 1938-39.

PRODUCTION OF PORK (BONE-IN WEIGHT).
(Tons.)

Year.	N.S.W.	Vic.	Q'land.	S. Aust.	W. Aust.	Tas.	N.T.	A.C.T.	Total.
Average, 1934-35 to 1938-39 ..	9,938	12,236	9,867	3,215	1,741	1,240	7	38	38,282
1947-48 ..	6,448	7,138	7,134	2,954	2,234	1,391	28	34	27,361
1948-49 ..	9,831	8,623	12,254	2,358	2,649	1,442	27	56	37,240
1949-50 ..	10,260	6,645	12,911	2,009	1,793	1,208	42	90	34,958
1950-51 ..	9,307	7,596	11,751	2,774	2,116	1,499	64	150	35,257
1951-52 ..	10,382	8,716	8,604	2,551	2,550	1,981	70	170	35,024

(ii) *Consumption*. As in the case of other meats, pork was subject to rationing during the late war and immediate post-war years. This resulted in the consumption of pork per head declining from the pre-war average of 10.4 lb. to 4.9 lb. in 1945. After 1945, the demand for pork for the Armed Services declined and larger quantities were available for civilian consumption. As a result, consumption per head rose steadily again to reach 7.4 lb. per head in 1948-49. Since then it has remained at about 7 lb. per head. In the following table details of the production and disposal of pork are shown for the years 1947-48 to 1951-52 compared with averages for the three years 1936-37 to 1938-39.

PRODUCTION AND DISPOSAL OF PORK (BONE-IN WEIGHT): AUSTRALIA.
(*000 tons.)

Year.	Changes in Stock.	Production. (a)	Exports.	Canning.	Consumption in Australia.	
					Total.	Per Head per annum.
Average, 1936-37 to 1938-39	45.5	13.7	..	31.8	10.4
1947-48	27.4	1.6	1.7	24.1	7.1
1948-49	37.3	9.0	1.9	25.8	7.4
1949-50	35.0	6.7	2.2	26.0	7.2
1950-51	35.3	5.6	4.0	25.2	6.8
1951-52	35.0	1.7	5.0	27.9	7.3

(a) Includes an estimate of trimmings from baconer carcasses.

4. Bacon and Ham.—(i) *Production.* As in the case of pork, the increased demand for bacon and ham during the war years stimulated production to a level not previously attained. Production reached its peak in 1944-45 when 56,246 tons of bacon and ham were cured. This has been followed by a continuous decline in output in each succeeding year to 36,628 tons in 1951-52. Details of production are shown by States in the following table for each year 1947-48 to 1951-52 compared with the average production for the five pre-war years ended 1938-39.

PRODUCTION OF BACON AND HAM (CURED WEIGHT).

(Tons.)

Year.	N S.W.	Victoria.	Q'land.	S. Aust.	W. Aust.	Tas.	A.C.T.	Australia.
Average, 1934-35 to 1938-39	9,963	7,614	9,269	2,950	2,013	970	1	32,780
1947-48	14,175	11,159	10,142	4,884	4,232	1,317	..	45,909
1948-49	13,302	10,204	9,412	3,788	3,756	1,122	..	41,584
1949-50	12,955	9,779	10,018	3,318	3,542	991	..	40,603
1950-51	12,629	7,905	8,764	3,042	3,558	946	..	36,844
1951-52(a)	12,514	8,964	7,669	2,969	3,683	829	..	36,628

(a) Pressed and canned bacon and ham have been converted to bone-in-weight.

(ii) *Consumption.* Consumption per head declined in the early stages of the 1939-45 War from the pre-war average of 10.2 lb. per annum, but by 1944 it had been restored to this level and subsequently increased to 12.7 lb. in 1946-47. Since that year, however, there has been a steady decline to 7.2 lb. per head during 1951-52. Details of production and disposal of bacon and ham for the years 1948-49 to 1951-52 compared with average production and disposal for the period 1936-37 to 1938-39 are shown in the following table:—

PRODUCTION AND DISPOSAL OF BACON AND HAM (CURED WEIGHT) : AUSTRALIA.

('000 tons.)

Year.	Changes in Stock.	Production.	Exports.	Canning.	Consumption in Australia.	
					Total.	Per head per annum.
Average, 1936-37 to 1938-39	(a)	32.5	1.0	..	31.5	10.2
1948-49	-0.1	41.6	3.4	2.2	36.1	10.4
1949-50	+0.1	40.6	3.3	2.6	34.6	9.6
1950-51	+0.2	36.8	3.0	2.9	30.7	8.3
1951-52(b)	+0.2	36.6	2.8	6.1	27.5	7.2

(a) Not available.

(b) Pressed and canned bacon and ham have been converted to bone-in-weight.

5. *United Kingdom Contracts.*—Details relating to the several war-time contracts and the more recent Long-term Purchase Agreement between the Governments of the Commonwealth and the United Kingdom for the sale and purchase of Australia's surplus production of meats (including pigmeats) are included in Chapter XIX.—Pastoral Production.

6. *Overseas Trade in Pigs and Pig Products.*—Total quantities and values of exports of Australian origin of pigs and pig products (bacon and ham, lard and frozen pork) for the years 1938-39 and 1947-48 to 1951-52 are shown on page 933.

§ 5. Poultry-Farming.

1. **General.**—Poultry-farming has been carried on in Australia for many years and the State Departments of Agriculture have encouraged its development by appointing experts to advise on the care and management of poultry and by conducting egg-laying competitions. Originally the industry was conducted in conjunction with other branches of rural activity, mainly dairying, but it is now a specialized and distinct industry and it is from this source that the bulk of the commercial production is obtained. Practically all farms keep poultry for the purpose of supplying their own domestic requirements and in many cases some supplies from this source are also marketed. In addition, many private homes keep small numbers of fowls in backyard runs and this helps to maintain domestic needs particularly when eggs are in short supply.

2. **Numbers of Poultry.**—In pre-war years the numbers of the principal kinds of poultry were a normal feature of the annual census of live-stock in all States except Victoria and Tasmania. These data were collected on a restricted scale by all States in 1942-43, the details obtained being confined to farms of one acre or more producing eggs or poultry for sale. The collection has since been discontinued in some States. Because of their incompleteness, details of poultry numbers are not published.

3. **Recorded Production and Disposal of Eggs.**—(i) *Shell Eggs.* Available statistics of the production and disposal of eggs in Australia are restricted to those recorded by the Egg Boards of the several States. Egg Boards, or authorities appointed to control the marketing of eggs, have operated in the States of New South Wales, Victoria and Queensland for some years, whilst in South Australia the Board commenced to operate in August, 1942. It was not until August, 1943 that Advisory Committees were established in Western Australia and Tasmania. Statistics of recorded production of eggs for Australia as a whole are not available, therefore, prior to 1943-44.

Details of production in the respective States as recorded by these authorities for the years 1947-48 to 1951-52 are shown in the following table :—

SHELL EGGS : PRODUCTION(a) RECORDED BY EGG BOARDS.
(^{'000 dozen.})

State.	1947-48.	1948-49.	1949-50.	1950-51.	1951-52.
New South Wales ..	50,569	52,052	52,269	50,465	50,271
Victoria	36,220	32,842	29,985	25,573	23,492
Queensland	9,693	12,144	11,176	10,858	8,426
South Australia ..	14,440	14,115	13,089	11,663	10,741
Western Australia ..	7,653	7,939	7,653	7,437	8,077
Tasmania	852	1,117	1,514	1,297	1,027
Total	119,427	120,209	115,686	107,293	102,034

(a) Receipts from consignors and sales by producer agents.

(ii) *Egg Pulp.* Prior to the 1939-45 War, production of egg pulp was about 7 million lb. per annum. This was used almost entirely for the manufacture of cakes, pastry and biscuits, only negligible quantities being exported. Production was expanded greatly during the war years to meet the requirements of the Armed Services and has since been maintained at a high level for export purposes and to meet increased local requirements.

Particulars of the production of whole egg pulp as recorded by the Egg Boards in the several States are shown in the following table.

LIQUID WHOLE EGG : PRODUCTION RECORDED BY EGG BOARDS.
(^{'000} lb.)

State.	1947-48.	1948-49.	1949-50.	1950-51.	1951-52.
New South Wales	14,600	15,966	14,760	16,003	12,357
Victoria	16,139	14,579	8,565	6,153	6,559
Queensland	3,240	4,560	4,498	4,008	2,278
South Australia	8,510	7,663	6,574	5,692	5,629
Western Australia	1,834	1,782	1,837	1,939	2,878
Tasmania	189	129	407	353	249
Total	44,512	44,679	36,641	34,148	29,950

In addition to liquid whole egg production was also recorded of liquid egg whites and liquid egg yolks. Output in 1951-52 amounted to 912,000 lb. and 654,000 lb. respectively compared with 517,000 lb. and 279,000 lb. respectively in the previous year.

(iii) *Egg Powder.* The production of dried egg powder was not established in Australia until 1942, when the industry was introduced to treat Australia's surplus eggs so as to maintain exports to the United Kingdom. The shortage of refrigerated shipping space precluded the export of shell eggs so they were converted into powdered form. Since the termination of hostilities in 1945, the manufacture of egg powder has been continued for export purposes, but has been considerably curtailed since 1946-47. Owing, no doubt, to the availability of fresh eggs, a market has not yet been established in Australia. Recorded production was 472,000 lb. in 1950-51 and 158,000 lb. in 1951-52, production being confined to New South Wales and South Australia.

4. **Production and Consumption of Eggs.**—Statistics of egg production must necessarily be accepted with some reserve. Owing to the difficulties experienced in obtaining a complete census of output, it is more expedient to compute a figure based on the best data available. The production shown in the following table, which shows also details of exports and consumption, is based upon the records of Egg Boards of production from areas under their control plus an estimate of production from uncontrolled areas and an estimate of the production of "back-yard" poultry-keepers. The estimates of total production obtained have been checked with data from other sources and found to be reasonably in accord.

ESTIMATED PRODUCTION AND DISPOSAL OF EGGS IN SHELL : AUSTRALIA.

(^{'000} tons.)(a)

Year.	Changes in Stock.	Estimated Total Production.	Exports.	For Drying and Pulping.(b)	Consumption in Aus- tralia as Human Food.	
					Total.	Per head per annum.
Average, 1936-37 to 1938-39	(c)	89.5	7.6	3.2	78.7	lb. 25.7
1948-49	+ 0.1	119.4	11.9	22.8	84.6	24.3
1949-50	- 0.3	116.5	14.0	19.0	83.8	23.3
1950-51	+ 0.2	110.4	8.4	17.0	84.8	22.9
1951-52	+ 1.1	106.9	8.5	14.9	82.4	21.6

(a) The average weight of an egg in Australia is taken as 1.75 oz.

(b) Includes wastage.

(c) Not available.

Details of the consumption of shell eggs, liquid whole egg and total shell egg equivalent (expressed in lb. and in number of eggs) per head of population per annum are shown in the following table:—

**SUPPLIES OF EGGS AND EGG PRODUCTS MOVING INTO CONSUMPTION :
AUSTRALIA.**

(lb. per head per annum.)

Commodity.	Average, 1936-37 to 1938-39.	1948-49.	1949-50.	1950-51.	1951-52.
Shell Eggs	25.7	24.3	23.3	22.9	21.6
Liquid Whole Egg and Egg Powder(a)	0.9	2.8	2.6	2.2	2.3
Total Shell Equivalent— lb. per Head ..	26.6	27.1	25.9	25.1	23.9
No. per Head(b) ..	243	248	236	229	219

(a) In terms of weight of shell eggs.
1.75 oz.

(b) The average weight of an egg in Australia is taken as

5. **Marketing of Eggs.**—(i) *United Kingdom Contracts.* Details of the annual contracts entered into between the United Kingdom and Australian Governments will be found in Official Year Book Nos. 38, pp. 1048-9 and 39 p. 1044.

In respect of the 1953-54 season the Ministry of Food will pay to the Australian Government the actual United Kingdom market realizations for eggs in shell, less actual cost, paid by the Ministry up to the point of delivery to wholesalers. For the same season the contract price for egg pulp was fixed at £294 sterling per ton, f.o.b. Australian ports which is equivalent to 3s. 3.375d. per lb. (Australian currency) and represents an increase of 3½d. per lb. (Australian currency) over the contract price for the 1952-53 season.

The prices stipulated in the several contracts for eggs and egg products for the years 1949-50 to 1953-54 are shown in the following table. Contract prices in operation for the years 1939-40 to 1944-45 were shown on page 997 of Official Year Book No. 37, and those for 1945-46 to 1948-49 on page 1049 of Official Year Book No. 38.

PRICES OF EGGS AND EGG PRODUCTS : UNITED KINGDOM CONTRACTS.

Australian Currency, f.o.b.

(s. d.)

Year.	Eggs in Shell.(a)	Frozen Whole Egg Pulp.	Whole Egg Powder.	Sugared Egg Powder.
	Per doz.	Per lb.	Per lb.	Per lb.
1949-50	2 7	1 11.05	7 5.88	5 2.63
1950-51	2 7	2 0.38	7 5.88	5 2.63
1951-52	3 3	2 4.75	8 10.25	6 1.75
1952-53	4 2.25	2 11.625	(b)	(b)
1953-54	(c)	3 3.375	(b)	(b)

(a) Price for pack of 15 lb. per long hundred (ten dozens); proportionate adjustments made for other packs. (b) Not purchased by the United Kingdom Government. (c) No contract price fixed. See letterpress above.

(ii) *Egg Export Control Act 1947.* Following the termination of Commonwealth control over the production and marketing of eggs on 31st December, 1947, functions relating to the local marketing of eggs reverted to State Egg Boards which became responsible for stabilizing prices and marketing of eggs produced in the respective States.

In order to assist in marketing Australia's surplus production of eggs under the Long-term Purchase Agreement with the United Kingdom, the Commonwealth established the Australian Egg Board under the Egg Export Control Act 1947. The Board, which commenced to operate on 1st January, 1948, is empowered to buy and sell, on behalf of the Commonwealth Government, eggs and egg products intended for export which comply with the provisions of the Export (Dairy Produce) Regulations. In addition, the Board is authorized to deal with all matters relating to the export of eggs and egg products from Australia, to make such experiments as are likely to lead to the improvement of the quality of Australian eggs and to promote their sale overseas. The Board consists of ten members, including six representatives of egg producers and one representative of the Commonwealth Government.

6. **Oversea Trade in Poultry Products.**—The Australian oversea export of poultry products has in the past been confined chiefly to eggs in shell and egg contents, which are consigned mainly to the United Kingdom. New South Wales, Victoria and South Australia are at present the largest exporters. Exports of eggs in shell from Australia rose from less than 3 million dozen valued at £219,000 in 1928-29 to 21.7 million dozen valued at more than £1,100,000 in 1934-35, but declined to 10.3 million dozen in 1939-40. A high level of exports in 1940-41 was followed by a steep decline down to almost negligible quantities in 1942-43 and 1943-44. In 1949-50 exports reached the record level of 23.0 million dozen, but in the two succeeding years amounted to less than 14 million dozen.

Prior to the 1939-45 War, exports of egg contents were small and in 1939-40 there was an excess of imports. During the war years, exports expanded greatly, mainly to meet Service requirements, and since the close of the war there has been further expansion, although the latest year, 1951-52, shows a considerable decline from the peak year, 1947-48.

Since the close of the war there has also been a remarkable increase in the exports of frozen poultry, exports amounting to 2,219,000 pair in 1951-52 compared with 283,000 pair in 1945-46. The average for the pre-war years 1934-35 to 1938-39 was only 37,913 pair.

Total quantities and values of exports of Australian origin of poultry products (live poultry, frozen poultry, eggs in shell, egg pulp and powder and undressed feathers) for the years 1938-39 and 1947-48 to 1951-52 are shown on page 933.

§ 6. Bee-Farming.

1. **Production of Honey and Bees-wax.**—Although practised as a separate industry, bee-farming is also carried on in conjunction with other branches of farming, but its place in Australia's rural economy is not very significant. The returns of honey from productive hives during 1951-52 showed an average of 74.56 lb. per hive and the average quantity of wax was 0.95 lb. per productive hive.

The number of hives and the production of honey and bees-wax during the year 1951-52 are shown in the following table.

BEEHIVES, HONEY AND BEES-WAX, 1951-52.

State.	Beehives.			Honey Produced.		Bees-wax Produced.	
	Pro- ductive.	Unpro- ductive.	Total.	Quantity.	Gross Value.	Quantity.	Gross Value.
	'000.	'000.	'000.	'000 lb.	£	lb.	£
New South Wales..	97	67	164	6,814	270,285	85,801	12,870
Victoria..	65	40	105	5,208	216,999	55,963	19,587
Queensland..	16	15	31	706	27,724	15,080	5,278
South Australia..	69	23	92	4,191	149,814	58,178	14,782
Western Australia	26	4	30	3,480	122,044	44,860	7,851
Tasmania..	4	1	5	254	13,250	3,266	1,220
Australia(a) ..	277	150	427	27,653	800,116	263,148	61,588

(a) Excludes Australian Capital Territory and Northern Territory.

The production of honey and bees-wax fluctuates considerably and is determined mainly by the flow of nectar from flora of the eucalypts, which varies greatly from year to year. In recent years there has been a pronounced upward trend in the output of honey, the 1948-49 figure (53,200,000 lb.) being an all-time record. Production in 1951-52 (20,653,000 lb.), although much lower than in 1948-49, was still higher than pre-war.

The table hereunder shows the production of honey and bees-wax for the five years ended 1951-52 in comparison with the averages for the years 1934-35 to 1938-39.

HONEY AND BEES-WAX PRODUCTION.

Year.	N.S.W.	Vic.	Q'land.	S. Aust.	W. Aust.	Tas.	Aust.(a)
HONEY ('000 lb.).							
Average, 1934-35 to							
1938-39 ..	3,827	3,600	689	3,388	1,125	181	12,810
1947-48 ..	9,776	6,934	1,895	5,298	1,732	208	25,843
1948-49 ..	26,008	8,730	3,045	10,906	4,290	221	53,200
1949-50 ..	9,227	7,744	1,187	5,179	2,041	285	25,663
1950-51 ..	9,994	8,088	1,925	5,803	1,314	315	27,439
1951-52 ..	6,814	5,208	706	4,191	3,480	254	20,653
BEES-WAX (lb.).							
Average, 1934-35 to							
1938-39 ..	55,927	41,856	10,318	41,083	18,855	2,382	170,421
1947-48 ..	113,211	70,851	32,147	85,405	19,598	3,144	324,356
1948-49 ..	295,892	90,778	47,184	140,384	55,239	2,944	632,421
1949-50 ..	117,939	78,124	22,162	70,442	32,045	3,724	324,436
1950-51 ..	126,047	90,605	29,907	78,838	16,968	4,218	346,583
1951-52 ..	85,801	55,963	15,080	58,178	44,860	3,266	263,148

(a) Excludes Australian Capital Territory and Northern Territory.

2. **Oversea Trade in Bee Products.**—Prior to the 1939-45 War the production of honey exceeded Australian requirements and a small quantity was available for export. As a result of increased production, exports have risen considerably since 1938-39, when a quantity of 687,000 lb. of honey was shipped. In 1948-49 the record quantity of 32.09 million lb., was exported. In 1950-51 exports amounted to 7.48 million lb. and in 1951-52 to 15.91 million lb.

The wider use of frame hives has reduced the production of wax, and as a result the quantity imported has generally exceeded that exported. During each of the five years prior to 1951-52 production was high on account of exceptionally good seasons, and exports exceeded imports by substantial margins. However, with the falling off in production in 1951-52 imports (73,294 lb.) again exceeded exports (23,587 lb.).

Total quantities and values of exports of Australian origin of honey and bees-wax for the years 1938-39 and 1947-48 to 1951-52 are shown on page 933.

§ 7. Exports of Australian Farmyard, Dairy and Bee Products.

The quantities and values of Australian farmyard, dairy and bee products exported during each of the five years ended 1951-52 are shown below in comparison with those of 1938-39.

AUSTRALIAN FARMYARD, DAIRY AND BEE PRODUCTS : EXPORTS OF AUSTRALIAN ORIGIN.

Particulars.	Unit of Quantity.	QUANTITY.					
		1938-39.	1947-48.	1948-49.	1949-50.	1950-51	1951-52.
Bees-wax	lb.	5,565	98,050	77,187	355,289	301,992	23,587
Butter	'000 lb.	229,543	184,774	183,554	177,452	120,031	25,417
Cheese	"	35,924	50,944	58,287	51,404	44,790	40,316
Eggs in shell	'000 doz.	10,144	14,518	19,605	23,047	13,522	13,832
Eggs not in shell—							
Egg pulp	'000 lb.	650	25,981	27,041	16,827	18,582	10,848
Egg powder	"		4,638	2,144	807	99	169
Feathers, undressed	"	(a)	(a)	(a)	(a)	(a)	(a)
Honey	'000 lb.	(b)	14,986	32,094	20,769	7,484	15,912
Lard	"	5,491	136	119	205	665	169
Meats—							
Bacon and ham	(c)	1,739	8,588	8,661	7,679	6,334	5,200
Frozen poultry	'000 pair	22	1,871	2,493	2,876	2,013	2,219
Frozen pork	'000 lb.	30,716	3,728	20,126	14,975	12,472	3,898
Milk—							
Condensed, Preserved, etc.—							
Sweetened Full Cream	"	12,572	66,639	66,000	70,495	73,001	66,508
Skim .. .. .	"	..	..	243	2	10	5
Unsweetened	"	754	3,342	3,316	1,862	4,607	2,396
Dried or Powdered—							
Full Cream	"	3,001	14,049	14,149	23,865	16,996	12,590
Skim	"	575	5,644	10,174	19,072	8,558	15,852
Infants' and Invalids' Foods—							
Essentially of milk	"	1,637	3,416	6,250	7,002	6,044	6,343
Other	"	..	4,036	5,195	5,453	6,415	5,600
Malted	"	565	3,609	4,227	2,738	2,254	2,361
Pigs, live	No.	61	941	1,179	813	2,208	1,236
Poultry, live	"	2,189	73,942	80,020	78,882	60,342	81,629

VALUE. (£.)

Bees-wax	148	16,166	11,832	53,443	60,424	6,922
Butter	12,891,837	20,629,483	23,806,663	24,669,790	18,469,147	4,593,251
Cheese	1,073,931	3,253,273	4,100,641	4,145,462	4,025,120	4,063,854
Eggs in shell	638,159	1,575,073	2,360,464	2,948,889	1,892,644	2,364,243
Eggs not in shell—						
Egg Pulp	23,014	1,811,520	2,457,185	1,906,219	2,017,474	1,290,709
Egg powder		788,858	286,773	165,959	27,025	24,191
Feathers, undressed	307	9,947	8,294	2,026	3,685	5,424
Honey	13,957	579,285	1,217,193	814,115	292,880	705,831
Lard	(b)	67,744	9,628	8,995	14,784	59,388
Meats—						
Bacon and ham	(c)	119,994	865,201	903,673	1,016,263	965,651
Frozen poultry	19,917	1,709,066	2,643,895	2,793,306	2,884,680	3,036,073
Frozen pork	882,117	208,717	1,199,034	1,067,844	1,050,927	484,539
Milk—						
Condensed, Preserved, etc.—						
Sweetened Full Cream	405,913	3,077,093	3,441,735	3,612,703	4,175,382	4,940,442
Skim .. .. .	..	..	13,166	88	565	276
Unsweetened	19,120	126,050	91,169	88,035	232,631	150,983
Dried or Powdered—						
Full Cream	92,835	906,713	1,220,512	1,955,665	1,457,773	1,458,345
Skim	6,160	188,383	412,835	713,435	350,388	754,407
Infants' and Invalids' Foods—						
Essentially of milk	209,925	306,363	579,767	684,838	672,812	955,460
Other .. .. .	..	649,706	702,782	658,486	743,140	955,543
Malted	57,058	309,807	369,057	256,938	205,205	304,086
Pigs, live	371	7,743	11,638	17,156	17,081	32,724
Poultry, live	970	7,054	7,864	10,392	18,026	9,376
Total	16,523,477	37,035,129	48,855,167	47,595,836	39,613,046	27,120,020

(a) Quantity not available.
tinned bacon.

(b) Includes lard oil and refined animal fats.

(c) Excludes

§ 8. Imports of Dairy and Farmyard Products into United Kingdom.

NOTE.—Values of imports in this section are expressed in £ sterling at the landed c.i.f. point.

1. Summary, Principal Products.—The following table shows the quantities and values of the principal dairy products imported into the United Kingdom during the years 1939 and 1948 to 1952.

DAIRY PRODUCTS : IMPORTS INTO UNITED KINGDOM.

Product.	1939.	1948.	1949.	1950.	1951.	1952.
Butter '000 cwt.	8,737	5,452	6,360	6,705	6,164	5,185
£'000	48,424	67,827	86,873	91,434	90,488	82,417
Cheese '000 cwt.	2,845	3,147	4,259	3,080	3,884	2,737
£'000	8,869	26,452	38,508	27,659	39,882	28,277
Milk, powdered and preserved						
£'000	2,818	5,314	10,893	6,391	9,724	10,398
Bacon and ham .. '000 cwt.	7,953	2,761	2,804	5,187	5,590	5,479
£'000	37,105	28,872	32,158	63,438	88,685	81,355
Pork '000 cwt.	989	224	602	612	311	302
£'000	3,036	1,244	4,904	5,189	2,688	3,835
Eggs, dried .. '000 cwt.	10	117	117	344	376	10
£'000	85	3,611	3,805	4,413	5,377	417
Eggs in shell .. '000 doz.	283,315	154,764	209,814	167,919	113,423	122,477
£'000	12,835	21,577	30,522	21,548	16,718	21,617
Eggs, liquid or frozen '000 cwt.	800	598	534	469	264	249
£'000	2,292	5,985	4,626	4,792	2,685	3,083

2. Butter.—(i) Imports. Australia normally supplies a considerable proportion of the butter imported into the United Kingdom. The quantity in 1952, however, was much lower than usual and amounted to only 277,911 cwt., or 5.36 per cent. of the total importation. The Australian contribution was valued at £4,507,584 and was exceeded by that received from New Zealand and Denmark. New Zealand supplied 57.28 per cent. of the total quantity imported during 1952 and Denmark, 33.54 per cent.

In the following table particulars of the quantity and value of butter imported into the United Kingdom are shown for the years 1938 and 1952 according to country of origin.

BUTTER : IMPORTS INTO UNITED KINGDOM.

Country from which Imported	1938.		1952.	
	Quantity.	Value.	Quantity.	Value.
	Cwt.	£	Cwt.	£
New Zealand	2,592,251	14,524,140	2,969,930	46,519,557
Australia	1,797,811	9,629,939	277,911	4,507,584
Other British Countries	422,704	2,454,725	10,807	165,696
Denmark	2,364,799	12,960,434	1,739,006	28,238,938
Netherlands	711,910	3,465,835	114,863	1,836,834
Other Foreign Countries	1,628,438	7,838,060	72,347	1,147,891
Total	9,517,913	50,873,133	5,184,864	82,416,500

(ii) *London Prices.* In the following table the prices shown up to and including September, 1939 represent the mean of the top prices quoted weekly for choicest salted Australian butter together with their f.o.b. equivalents in Sydney and Melbourne in terms of Australian currency. Since September, 1939, the price represents that fixed in accordance with the contract between the Governments of Australia and the United Kingdom for choicest Australian butter. Pence have been omitted throughout.

**AVERAGE PRICE PER CWT. OF AUSTRALIAN CHOICEST BUTTER IN LONDON
(WITH F.O.B. EQUIVALENTS IN AUSTRALIAN CURRENCY).**

Month.	1938-39.		1939-40.		Year.	London.	Aus- tralia.
	London.	Aus- tralia.(a)	London.	Aus- tralia.			
	Shillings (Stg.).	Shillings (Aust.).	Shillings (Stg.).	Shillings (Aust.).			
July ..	120	135	114	(a) 127	1940-41 ..	(b) 110	(c) 137
August ..	118	132	110	(a) 123	1941-42 ..	110	137
September ..	116	130	120	(a) 135	1942-43 ..	114	143
October ..	111	124	(b) 110	(c) 137	1943-44 ..	114	143
November ..	104	115	(b) 110	(c) 137	1944-45 ..	148	185
December ..	107	119	(b) 110	(c) 137	1945-46 ..	148	185
January ..	120	134	(b) 110	(c) 137	1946-47 ..	173	217
February ..	118	132	(b) 110	(c) 137	1947-48 ..	203	254
March ..	115	128	(b) 110	(c) 137	1948-49 ..	233	292
April ..	113	126	(b) 110	(c) 137	1949-50 ..	251	314
May ..	107	119	(b) 110	(c) 137	1950-51 ..	272	339
June ..	113	126	(b) 110	(c) 137	1951-52 ..	292	365
					1952-53 ..	314	393

(a) Sydney and Melbourne.
contract price.

(b) Contract price f.o.b. Australian ports.

(c) Equivalent of

3. *Cheese.*—The value of cheese imported into the United Kingdom in 1952 was £28,277,000. Of this, £15,366,000 represented imports from New Zealand, £4,112,000 from Denmark, £2,849,000 from the Netherlands and £2,722,000 from Australia.

4. *Bacon.*—Of a total import in 1952 of bacon valued at £68,243,000, the value of that supplied by Denmark was £47,286,000, Poland, £10,249,000, and the Netherlands, £10,158,000.

5. *Pork.*—The value of the United Kingdom imports of pork was £3,835,000 in 1952. Imports from New Zealand, valued at £1,192,000, and Argentina, £736,000, comprised 50 per cent. of the imports into the United Kingdom.

6. *Eggs.*—In 1952 the value of eggs imported into the United Kingdom was £25,117,000, comprising eggs-in-shell, £21,617,000, liquid or frozen eggs, £3,083,000, and dried eggs, £417,000. The Australian share in this trade amounted to £5,114,000. Eggs-in-shell were supplied by Denmark, £13,990,000 and Irish Republic, £3,299,000.

7. **Milk Products.**—In 1952 the value of powdered and preserved milk imported into the United Kingdom was £10,398,000, comprising condensed milk, sweetened, £3,130,000, condensed milk, unsweetened, £1,742,000 and powdered milk, £5,526,000. Australia supplied unsweetened milk powder valued at £980,000.

8. **Other Products.**—The imports into the United Kingdom from Australia of poultry amounted to £1,978,000, while those of bees-wax, lard and honey in 1952 were unimportant.