

CHAPTER XVI.

PASTORAL PRODUCTION.

§ 1. Initiation and Growth of Pastoral Industry.

1. **Early Statistics.**—In earlier issues of the Year Book will be found a brief reference to the pastoral industry in Australia prior to the year 1860. (See Year Book No. 6, page 330).

2. **Subsequent Statistics.**—While the statistical records of live stock in Australia prior to the year 1860 are somewhat defective, from that year onwards fairly complete particulars are available for most of the States. At the present time, statistics of live stock are collected annually in all the States principally through the agency of the police, but in the years 1885 to 1888 inclusive, and 1893 to 1895 inclusive, these particulars were not collected in South Australia, and similar gaps occur in the Victorian records for the periods 1895 to 1899 inclusive, and 1901 to 1903. In order to obtain totals for Australia for these years the missing numbers have been supplied by interpolation. The results so obtained probably differ but slightly from the actual numbers for the respective years.

3. **Increase in Live Stock.**—Particulars concerning the numbers of each of the principal kinds of live stock in Australia at decennial intervals from 1860 to 1910, and from 1918 onwards in single years, are given in the following table, and are shown continuously in the graphs hereinafter.

During the sixty-three years covered by the table the live stock of Australia increased considerably, horses 439 per cent., cattle 237 per cent., sheep 298 per cent., and pigs 156 per cent. The average annual increases which these aggregates represent are as follows:—Horses 2.76 per cent.; cattle 1.98 per cent.; sheep 2.25 per cent.; and pigs, 1.53 per cent.

LIVE STOCK.—AUSTRALIA, 1860 TO 1923.

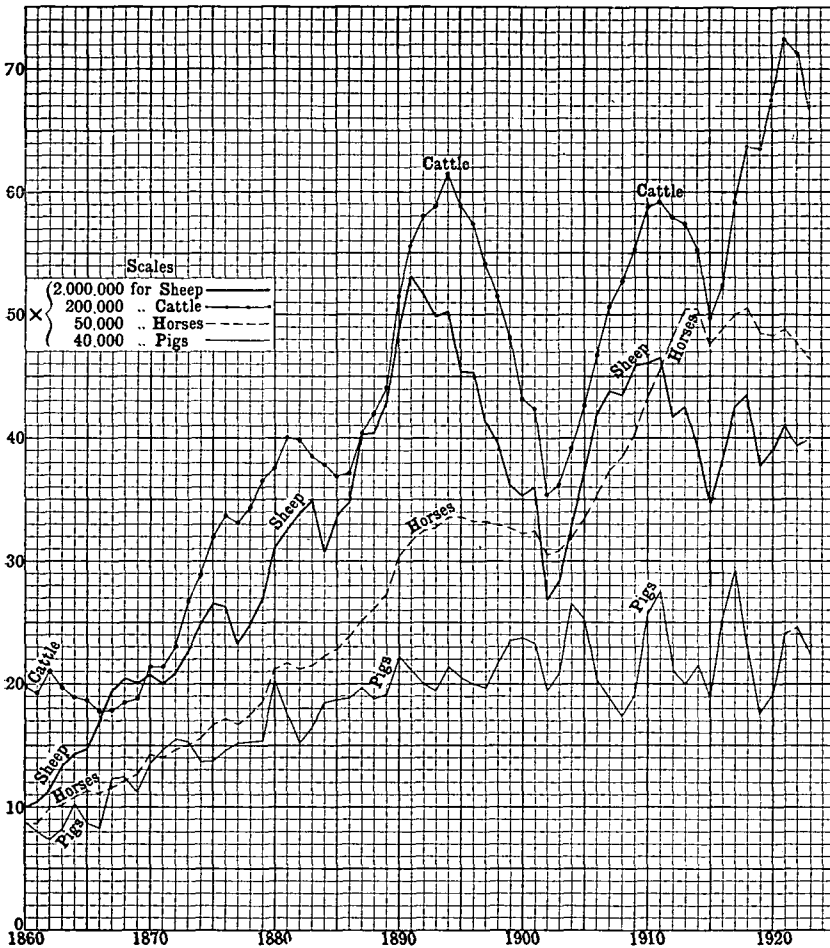
Year.	Horses.	Cattle.	Sheep.	Pigs.
1860	431,525	3,957,915	20,135,286	351,096
1870	716,772	4,276,326	41,593,612	543,388
1880	1,061,078	7,523,000	62,176,027	815,776
1890	1,521,588	10,299,913	97,881,221	891,138
1900	1,609,654	8,640,225	70,602,995	950,349
1910	2,165,866	11,744,714	92,047,015	1,025,850
1918	2,527,149	12,738,852	87,086,236	913,902
1919	2,421,201	12,711,067	75,554,082	695,968
1920	2,415,510	13,499,737	77,897,555	764,406
1921	2,438,182	14,441,309	82,226,470	960,385
1922	2,390,460	14,336,673	78,803,261	985,930
1923	2,327,440	13,357,508	80,110,461	897,874

4. **Fluctuations.**—The increases referred to, however, have not been continuous, marked fluctuations having taken place during the period, mainly on account of the droughts which have from time to time left their impress on the pastoral history of Australia. These were in evidence in 1869, 1877, 1884, 1895, and subsequent years, 1902, 1908, 1912, 1914–15, 1918 to 1920, and again in 1922–23, in which latter years the interior of the Continent experienced one of the driest periods on record, and the mortality of stock was heavy.

As an offset to these visitations, good seasons invariably supervene on the dry periods, and the large natural increases occurring under these conditions greatly facilitate the process of restocking, thus bearing convincing testimony to the extraordinary recuperative powers of the country.

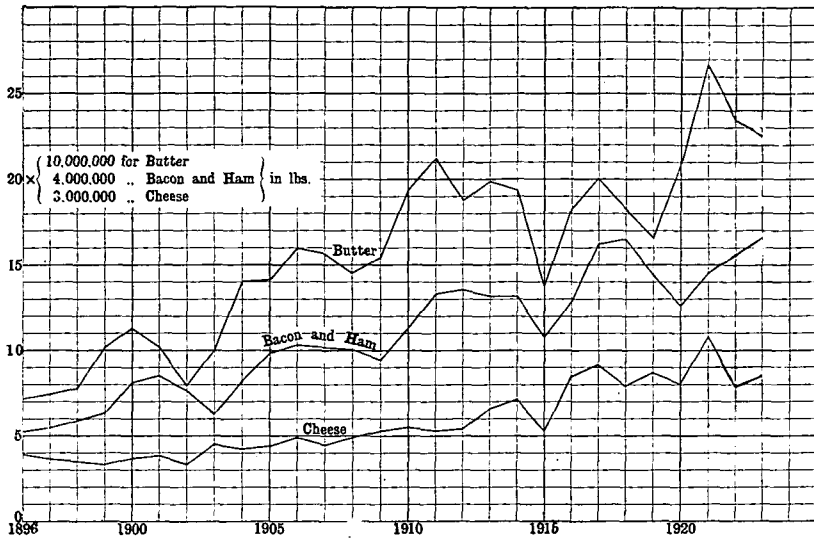
The years in which the numbers of live stock attained their maxima are as follows:—Horses, 1918, 2,527,149; cattle, 1921, 14,441,309; sheep, 1891, 106,421,068; and pigs, 1917, 1,169,365.

NUMBER OF HORSES, CATTLE, SHEEP, AND PIGS—AUSTRALIA, 1860 TO 1924.



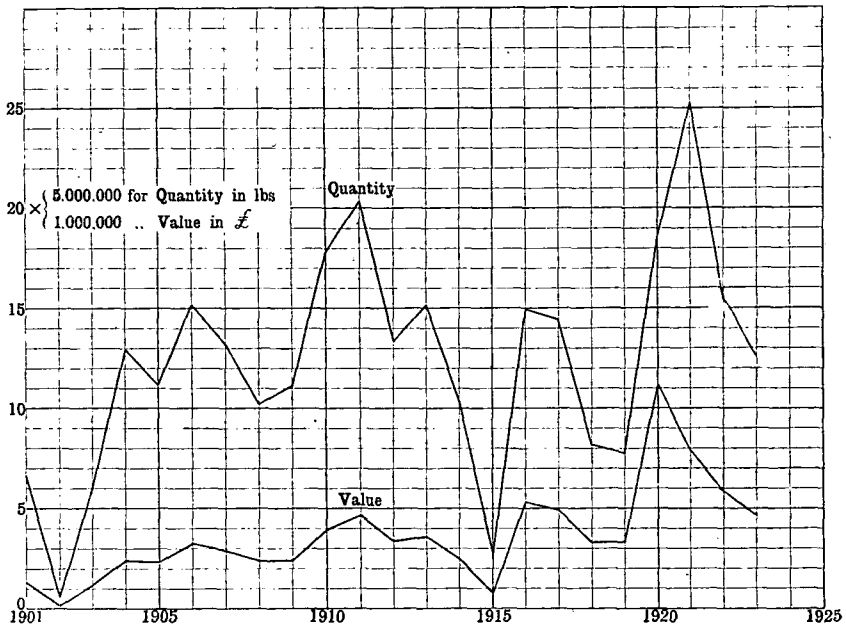
EXPLANATION.—The base of each small square represents an interval of one year, and the vertical side 2,000,000 in the case of sheep, 200,000 for cattle, 50,000 for horses, 40,000 for pigs.

PRODUCTION OF BUTTER AND CHEESE, AND BACON AND HAM—AUSTRALIA.
1896 TO 1923.



EXPLANATION.—The base of each small rectangle represents an interval of one year, and the vertical height of each denotes in the case of butter 10,000,000 lbs.; in the case of bacon and ham 4,000,000 lbs. and in the case of cheese 3,000,000 lbs.

QUANTITY AND VALUE OF NET EXPORTS OF BUTTER FROM AUSTRALIA, 1901 TO 1923.



EXPLANATION.—The base of each small rectangle represents an interval of one year, and the vertical height of each 5,000,000 lbs. in weight, or £1,000,000 in value.

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

LIVE STOCK PER HEAD OF POPULATION—AUSTRALIA, 1860 TO 1923.

Year.	Horses.	Cattle.	Sheep.	Pigs.	Year.	Horses.	Cattle.	Sheep.	Pigs.
1860 ..	0.38	3.45	17.58	0.31	1918 ..	0.49	2.48	16.99	0.18
1870 ..	0.43	2.60	25.24	0.33	1919 ..	0.45	2.38	14.15	0.13
1880 ..	0.48	3.37	27.87	0.37	1920 ..	0.44	2.49	14.35	0.14
1890 ..	0.48	3.27	31.06	0.28	1921 ..	0.44	2.61	14.86	0.17
1900 ..	0.43	2.29	18.75	0.25	1922 ..	0.42	2.54	13.94	0.17
1910 ..	0.49	2.65	20.80	0.23	1923 ..	0.40	2.31	13.88	0.16

Considered in relation to population the most noticeable variations have been the largely reduced numbers of sheep and pigs in recent years, the reductions amounting to about one-half of the earlier figures. The number of cattle has also declined, and a decrease in the number of horses is in evidence since 1918.

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

LIVE STOCK PER SQUARE MILE.

States and Territories.	Date.	Horses.	Cattle.	Sheep.	Pigs.
New South Wales ..	30th June, 1924 ..	2.12	9.48	120.89	1.04
Victoria ..	1st March, 1924 ..	5.53	18.11	125.84	2.96
Queensland ..	31st Dec., 1923 ..	0.98	9.54	24.99	0.20
South Australia ..	30th June, 1924 ..	0.68	1.09	17.36	0.19
Western Australia ..	31st Dec., 1923 ..	0.19	0.98	6.76	0.06
Tasmania ..	1st March, 1924 ..	1.43	8.41	59.42	1.80
Northern Territory ..	31st Dec., 1923 ..	0.09	1.61	0.01	0.00
Fed. Cap. Territory ..	30th June, 1924 ..	1.52	6.47	140.85	0.46
Total	1923-24	0.78	4.49	26.93	0.30

7. **Minor Classes of Live Stock.**—The numbers of minor classes of live stock returned for 1923-24 were as follows:—Goats, 228,398; camels, 11,107; mules and donkeys, 17,352; and ostriches, 691. Of these, goats were most numerous in Queensland; camels, mules and donkeys in Western Australia; and ostriches in South Australia. In the raising of goats, attention has in recent years been devoted to the angora goat and its product (mohair), and about 13,000 angora goats are included in the total of 228,398 goats shown above. Of these, 3,068 were in New South Wales, 1,070 in Tasmania, 991 in Western Australia, 942 in South Australia, and 3,931 in Queensland, while the quantity of mohair produced in the latter State in 1923 was set down at 2,204 lbs., and the number of skins placed on the market was returned as 625.

8. **Net Exports of Principal Pastoral Products.**—The quantities by which the exports of the principal pastoral products of Australia exceeded the imports for the years 1919-20 to 1923-24 are as follows:—

NET EXPORTS OF PASTORAL PRODUCTS.—AUSTRALIA, 1919-20 TO 1923-24.

Products.	Unit of Quantity.	1919-20.	1920-21.	1921-22.	1922-23.	1923-24.
QUANTITIES.						
Animals (living)—						
Cattle	No.	3,133	4,398	9,110	13,818	— 71
Horses	"	5,787	8,195	1,798	3,545	1,478
Sheep	"	21,601	19,307	36,111	37,959	30,302
Bones	cwt.	29,198	24,160	21,718	23,276	26,158
Glue-pieces and Sinews	"	8,158	—3,920	4,987	6,927	—1,993
Glycerine	lb.	—21,745	—854,254	19,348	343,292	—230,485
Hair	"	600,695	100,434	—126,037	(a)	(a)
Hoofs	cwt.	11,382	7,580	10,615	11,174	10,380
Horns	"	(a)	(a)	(a)	(a)	(a)
Meats—						
Frozen Beef	lb.	120,939,750	179,618,149	124,158,191	152,925,321	105,145,255
Frozen Mutton and Lamb	"	246,957,427	54,892,764	91,712,280	167,578,967	39,768,347
Frozen Rabbits and Hares	pair	9,622,150	3,925,004	4,857,404	4,264,054	3,489,496
Frozen, Other	lb.	11,397,792	7,901,468	6,676,605	13,062,037	6,687,005
Potted and Extract of	"	(a)	(a)	(a)	(a)	(a)
Preserved in Tins, etc.	lb.	47,550,045	8,296,500	9,133,860	10,583,164	4,268,814
Other (excluding Bacon and Ham)	"	755,141	482,317	344,167	489,564	234,058
Sausage Casings	cwt.	(a)	(a)	(a)	24,623	13,213
Skins—						
Hides	No.	540,415	—8,317	80,415	47,900	665,466
Sheep	"	10,143,952	5,117,431	6,780,522	10,237,162	6,891,162
Rabbit and Hare	cwt.	127,452	49,427	74,224	122,743	77,862
Other (including Undressed Furs)	"	(a)	(a)	(a)	(a)	(a)
Tallow	cwt.	712,307	524,220	893,772	1,016,831	394,313
Wool—						
Greasy	lb.	552,307,700	417,647,343	710,591,430	597,429,649	478,210,488
Scoured	"	84,900,446	61,525,697	102,346,835	106,319,965	41,735,194
Tops	"	6,148,118	6,598,631	6,200,505	6,374,922	4,988,258

NOTE.—The minus sign — signifies net imports. (a) Quantity not available.

The values of the net exports for the same five years are furnished in the next table, and amount to no less a total than £314,270,215 for the period, or an average of £62,854,043 per annum, of which wool represents 78 per cent. Meats, skins, and tallow rank next in order of importance.

NET EXPORTS OF PASTORAL PRODUCTS.—AUSTRALIA, 1919-20 TO 1923-24.

Products.	1919-20.	1920-21.	1921-22.	1922-23.	1923-24.
VALUES.					
Animals (living)—	£	£	£	£	£
Cattle	—23,855	30,350	53,274	64,731	—31,430
Horses	117,739	137,497	—1,148	27,978	—36,741
Sheep	57,854	140,975	36,921	42,017	40,887
Bones	31,534	21,839	19,610	26,137	32,301
Glue-pieces and Sinews	15,340	302	7,883	13,725	21,688
Glycerine	1,351	—39,374	1,516	8,536	—5,965
Hair	66,943	28,416	6,736	—62,830	—70,283
Hoofs	14,526	8,180	7,120	8,137	7,723
Horns	52,383	29,609	34,418	35,388	32,888
Meats—					
Frozen Beef	2,474,904	3,819,094	1,867,681	1,794,104	1,301,304
Frozen Mutton and Lamb	5,482,263	1,578,634	2,139,537	4,320,977	1,169,667
Frozen Rabbits and Hares	762,936	432,745	407,143	321,329	320,442
Frozen, Other	305,948	190,795	128,451	189,170	95,127
Potted and Extract of	99,599	9,649	—49,636	—40,170	—78,343
Preserved in Tins, etc.	2,778,503	380,694	324,275	266,273	94,094
Other (excluding Bacon and Ham)	37,845	16,741	10,852	10,577	5,798
Sausage Casings	212,427	—43,160	128,127	285,504	154,068
Skins—					
Hides	1,089,731	—113,202	122,471	249,208	338,263
Sheep	2,585,171	1,228,012	1,305,223	2,973,146	3,057,789
Rabbit and Hare	3,670,791	968,972	784,346	1,961,777	1,348,508
Other (including Undressed Furs)	2,268,748	715,656	288,633	785,467	798,166
Tallow	2,855,602	1,347,400	1,440,683	1,612,676	745,209
Wool—					
Greasy	38,414,608	25,298,176	38,970,130	45,769,295	48,294,399
Scoured	9,169,288	6,426,167	7,795,146	9,898,651	6,298,197
Tops	2,957,679	2,049,588	1,207,048	1,411,683	1,161,920
Total Values	75,499,858	44,663,755	57,036,440	71,974,486	65,095,676

NOTE.—The minus — sign signifies net imports.

§ 2. Horses.

1. **Suitability of Australia for Horse-breeding.**—From the earliest times the suitability of the climate and pastures of Australia for the production of serviceable breeds of horses has been fully recognized. By the importation of high-class sires, and the careful selection of breeding mares, these natural advantages are utilized to the fullest extent, all classes of horses being bred. As a consequence of this combination of advantages, the Australian horse, whether of the heavy draught, medium weight, or light saddle and carriage variety, compares more than favourably with the product of other lands. The Australian horse has been found suitable for the army in India, and large numbers are obtained annually for remount purposes. During the recent war, Australian horses were found to be well adapted for all purposes, especially in Palestine.

2. **Distribution throughout Australia.**—As regards numbers, the State of New South Wales, the earliest settled of the group, established a lead, which it retained till the year 1914, when it gave place to Queensland, where rapid progress had been in evidence during the previous decade. New South Wales regained the lead during the next three seasons, but Queensland again replaced the latter State in 1919, and has maintained its position during the past five seasons. Particulars of the several States for the past five years are as follows:—

HORSES—NUMBER, 1919 TO 1923.

Year.	N.S.W. (b)	Vic. (a)	Q'land.	S. Aust. (b)	W. Aust.	Tas. (a)	N.T.	F.C.T. (b)	Total.
1919	660,751	513,500	730,326	264,901	174,919	39,452	35,839	1,513	2,421,201
1920	661,846	487,503	741,024	268,187	178,664	39,117	37,837	1,332	2,415,510
1921	668,501	496,124	746,281	267,639	180,334	38,439	39,565	1,299	2,438,182
1922	658,686	494,947	713,015	264,150	181,159	37,313	39,845	1,345	2,390,460
1923	656,939	486,075	660,387	258,489	181,944	37,570	44,603	1,433	2,327,440

(a) 1st March year following.

(b) 30th June year following.

The number of horses attained its maximum in Australia during 1918, when 2,527,149 were recorded. Since that date, however, a gradual decline has taken place in all the States, except Western Australia and Northern Territory, the decrease for Australia during the period amounting to 199,709.

Particulars regarding the number of horses in Australia from 1860 onwards, may be ascertained from the graph herein.

3. **Proportions in the Several States and Territories.**—The percentages of the number of horses in the several States and Territories on the total for Australia for the past five years are as follows:—

HORSES.—PERCENTAGE IN EACH STATE, 1919 TO 1923.

Year.	N.S.W.	Vic.	Q'land.	S. Aust.	W. Aust.	Tas.	N.T.	F.C.T.	Total.
	%	%	%	%	%	%	%	%	%
1919 ..	27.29	21.21	30.16	10.94	7.23	1.63	1.48	0.06	100.00
1920 ..	27.40	20.18	30.68	11.10	7.40	1.62	1.57	0.05	100.00
1921 ..	27.42	20.35	30.61	10.98	7.40	1.57	1.62	0.05	100.00
1922 ..	27.55	20.70	29.83	11.05	7.58	1.56	1.67	0.06	100.00
1923 ..	28.23	20.88	28.37	11.11	7.82	1.61	1.92	0.06	100.00

The relative changes in distribution are insignificant, the only alteration during the last four years being a decrease of $1\frac{1}{2}$ per cent. in Queensland, occasioned by increases in New South Wales, Western Australia and the Northern Territory.

4. **Relation to Population.**—In proportion to population, horses are much more numerous in the Northern Territory than in any other of the principal divisions of Australia. Queensland is next in order, while Tasmania has the smallest number of

horses per head. The number per head of population has declined in all the statistical divisions, with the exception of Northern Territory, since 1919. Particulars for the past five years are as follows :—

HORSES.—NUMBER PER HEAD OF POPULATION, 1919 TO 1923.

Year.	N.S.W.	Victoria.	Q'land.	S. Aust.	W. Aust.	Tas.	N. Ter.	Fed. Cap. Ter.	All States.
1919 ..	0.32	0.34	0.99	0.54	0.53	0.19	7.88	0.68	0.45
1920 ..	0.31	0.32	0.99	0.54	0.54	0.18	9.48	0.52	0.44
1921 ..	0.31	0.32	0.97	0.53	0.54	0.18	10.59	0.45	0.44
1922 ..	0.30	0.31	0.90	0.51	0.53	0.17	11.22	0.41	0.42
1923 ..	0.30	0.30	0.81	0.49	0.51	0.17	12.55	0.39	0.40

5. Comparison with other Countries.—The number of horses in some of the leading horse-breeding countries of the world, according to the latest available returns, is as follows :—

HORSES.—NUMBER IN PRINCIPAL COUNTRIES.

Country.	Date.	Number of Horses ('000 omitted.)	Country.	Date.	Number of Horses ('000 omitted.)
Soviet Republics ..	1924	22,100	Hungary ..	1922	717
U.S. of America ..	1924	17,589	Dutch East Indies..	1921	702
Argentine Republic..	1921	9,432	Spain ..	1924	634
Brazil ..	1920	5,254	Turkey ..	1919	630
China ..	1916	4,401	Czecho-Slovakia ..	1920	592
Germany ..	1924	3,850	Uruguay ..	1919	555
Canada ..	1924	3,546	Denmark ..	1924	548
Poland ..	1921	3,263	Colombia ..	1915	526
France ..	1923	2,848	India (Native States)	1922	515
Australia ..	1923	2,327	Mexico ..	1923	512
Rumania ..	1923	1,828	Paraguay ..	1919	490
India (British) ..	1922	1,684	Lithuania ..	1924	482
Japan ..	1922	1,576	Finland ..	1923	400
United Kingdom ..	1924	1,529	Bulgaria ..	1920	399
Jugo-Slavia ..	1923	1,034	Irish Free State ..	1924	389
Italy ..	1919	990	Netherlands ..	1921	364
Union of South Africa	1921	920	Latvia ..	1924	340
Cuba ..	1923	844	New Zealand ..	1924	330
Sweden ..	1920	728	Chile ..	1922	329

6. Oversea Trade in Horses.—(i) *Exports.* Australia's export trade in horses is not nearly as large as formerly, and is somewhat fluctuating. During the past five years it has varied in number between 8,302 in 1920-21 and 1,785 in 1923-24, and in value between £186,943 in the former and £59,799 during the latter year. The total number of horses exported during the five years amounted to 21,955, valued at £591,456, or equal to an annual average of 4,391 for £118,291. The average export price for the period was £26 18s. 9d. Nearly 75 per cent. of the horses exported went to India, where they are largely used for remount purposes.

(ii) *Imports.* The number of horses imported into Australia is comparatively small, consisting mainly of valuable animals introduced for breeding purposes, principally from the United Kingdom and New Zealand. The average value per head of the horses imported during the last five years was £300 9s. 3d., as compared with £26 18s. 9d. per head for the exports for the same period. The average number imported per annum was, however, only 230, and the average annual value, £69,226. The following table gives the imports, exports, and net exports of horses during each of the years from 1919-20 to 1923-24 :—

HORSES.—IMPORTS AND EXPORTS, AUSTRALIA, 1919-20 TO 1923-24.

Year.	Imports.		Exports.		Net Exports.	
	No.	Value.	No.	Value.	No.	Value.
		£		£		£
1919-20	152	49,078	5,939	166,817	5,787	117,739
1920-21	107	49,446	8,302	186,943	8,195	137,497
1921-22	277	69,382	2,075	68,234	1,798	- 1,148
1922-23	309	81,685	3,854	109,663	3,545	27,978
1923-24	307	96,540	1,785	59,799	1,478	- 36,741

NOTE.—The minus sign — signifies net imports.

§ 3. Cattle.

1. Purposes for which Raised.—In all the States, cattle-raising is carried out on a more or less extensive scale, 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 improvement in quality of the dairy herds of Victoria, New South Wales, and Southern Queensland in particular, the portion of Australia in the temperate zone being the best adapted to this industry. On the other hand, by far the finest specimens of beef-producing cattle are those raised in the tropical districts, i.e., in the northern parts of Queensland, in the Northern Territory, and in the Kimberley districts in the north of Western Australia.

2. Distribution throughout Australia.—Until 1880 New South Wales occupied the leading position as a cattle-raising State, but in that year Queensland took first place, which it has since maintained. The graph herewith shows a rapid increase in the number of cattle in Australia up to the year 1894, when 12,311,617 head were depastured. From 1895 onwards, however, the effects of droughts and the ravages of tick fever reduced the number to 7,062,742 in 1902. Following the disastrous drought which terminated in the latter year, the herds were gradually built up, and despite recurring droughts, they continued to increase in recent years until the maximum number of 14,441,309 cattle was attained in 1921. The decline in the frozen beef trade and the drought of 1922-23, which particularly affected the beef cattle areas of New South Wales and Queensland, were mainly responsible for the heavy decreases recorded in both these States during the past two years.

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

CATTLE.—NUMBER, 1919 TO 1923.

Year.	N.S.W. (b)	Victoria. (a)	Q'land.	S. Aust. (b)	W. Aust.	Tas. (a)	Nor. Ter.	Fed. Cap. Ter. (b)	Total.
1919	3,075,954	1,631,120	5,940,433	349,562	880,644	214,442	610,534	8,378	12,711,067
1920	3,367,880	1,575,159	6,455,067	376,399	849,803	208,202	659,840	7,387	13,499,737
1921	3,538,240	1,750,369	7,047,370	419,197	893,108	216,704	568,031	8,290	14,441,309
1922	3,244,905	1,785,660	6,955,463	425,811	939,596	218,197	760,766	6,275	14,336,673
1923	2,932,437	1,591,367	6,396,514	413,272	953,764	220,351	843,718	6,085	13,357,508

(a) 1st March year following. (b) 30th June year following.

3. Proportion in each State.—Percentages showing the relative importance of the various cattle-breeding States during the years 1919 to 1923 are given hereunder:—

CATTLE.—PERCENTAGE IN EACH STATE, 1919 TO 1923.

Year.	N.S.W.	Victoria.	Q'land.	S. Aust.	W. Aust.	Tas.	Nor. Ter.	Fed. Cap. Ter.	Total.
	%	%	%	%	%	%	%	%	%
1919 ..	24.20	12.83	46.73	2.75	6.93	1.69	4.80	0.07	100.00
1920 ..	24.95	11.67	47.82	2.79	6.29	1.54	4.89	0.05	100.00
1921 ..	24.50	12.12	48.80	2.90	6.19	1.50	3.93	0.06	100.00
1922 ..	22.63	12.46	48.52	2.97	6.55	1.52	5.31	0.04	100.00
1923 ..	21.95	11.91	47.89	3.09	7.14	1.65	6.32	0.05	100.00

Queensland contains within its borders nearly one half of the cattle-herds of Australia. Despite decreases during the past two seasons the percentage of cattle in Queensland on the total for Australia amounted to 47.89 in 1923. The largest relative gain since 1919 occurred in the Northern Territory, where the number has considerably increased in recent years.

4. Relation to Population.—The number of cattle per head of population differs considerably in the several States, as may be seen from the following table :—

CATTLE.—NUMBER PER HEAD OF POPULATION, 1919 TO 1923.

Year.	N.S.W.	Victoria.	Q'land.	S. Aust.	W. Aust.	Tas.	Nor. Ter.	Fed. Cap. Ter.	All States.
1919 ..	1.49	1.09	8.05	0.72	2.69	1.02	134.27	3.77	2.38
1920 ..	1.60	1.03	8.58	0.76	2.57	0.98	165.29	2.86	2.49
1921 ..	1.65	1.12	9.15	0.83	2.66	0.99	152.00	2.84	2.61
1922 ..	1.48	1.12	8.82	0.82	2.73	1.00	214.24	1.93	2.54
1923 ..	1.32	0.98	7.89	0.78	2.70	1.01	237.33	1.65	2.31

The maintenance of the ratio of cattle to population during the last four years must be regarded as highly satisfactory, in view of the depressed state of the beef export industry and the effects of the recent drought.

5. Comparison with other Countries.—In the following comparison of the herds of Australia with those of some of the principal cattle-raising countries of the world, the latest available figures have been inserted in each case :—

CATTLE.—NUMBER IN VARIOUS COUNTRIES.

Country.	Date.	No. of Cattle (,000 omitted).	Country.	Date.	No. of Cattle (,000 omitted).
India (British) ..	1922	116,665	Czecho-Slovakia ..	1920	4,391
U.S. of America ..	1924	64,928	Irish Free State ..	1923	4,194
Soviet Republics ..	1924	46,200	Jugo-Slavia ..	1923	4,053
Argentine Republic ..	1922	37,065	Tanganyika Territory	1923	3,800
Brazil ..	1920	34,271	Dutch East Indies ..	1921	3,791
India (Native States) ..	1922	26,512	Turkey ..	1919	3,740
Germany ..	1923	17,296	New Zealand ..	1924	3,563
China ..	1921	15,973	Spain ..	1924	3,436
France ..	1924	14,024	Kenya ..	1923	3,190
Australia ..	1923	13,358	Indo-China ..	1921	3,099
Colombia ..	1922	9,428	Siam ..	1923	2,972
Canada ..	1924	9,159	French Equatorial and West Africa ..	1922	2,950
Union of South Africa ..	1921	8,557	Nigeria ..	1922	2,910
Uruguay ..	1924	8,432	Sweden ..	1920	2,736
Poland ..	1921	7,967	Denmark ..	1924	2,666
Madagascar ..	1922	7,819	Venezuela ..	1921	2,600
United Kingdom ..	1923	7,794	Mexico ..	1923	2,363
Italy ..	1919	6,239	Austria ..	1923	2,163
Rumania ..	1923	5,554	Netherlands ..	1921	2,063
Paraguay ..	1919	5,500			
Cuba ..	1923	5,085			

6. Imports and Exports of Cattle.—Although the various products of the cattle-raising industry bulk largely in the export trade of Australia, the export of live cattle has never been considerable. The number of cattle imported is also small, consisting, as in the case of horses, mainly of valuable animals for breeding. Details are as follows:—

CATTLE.—IMPORTS AND EXPORTS, AUSTRALIA, 1919-20 TO 1923-24.

Year.	Imports.		Exports.		Net Exports.	
	No.	Value.	No.	Value.	No.	Value.
		£		£		£
1919-20 ..	337	55,656	3,470	31,801	3,133	-23,855
1920-21 ..	127	10,979	4,523	41,329	4,396	30,350
1921-22 ..	108	10,769	9,218	64,043	9,110	53,274
1922-23 ..	147	18,856	13,965	83,587	13,818	64,731
1923-24 ..	2,683	46,684	2,612	15,254	-71	-31,430

NOTE.—The minus sign — signifies net imports.

The importation of fat cattle from New Zealand for the Melbourne market was the cause of the relatively large import in 1923-24. Omitting these unusual shipments the average value of the cattle imported during the last five years was £134 2s. 10d. per head, while the average value of the cattle exported during the same period was £6 19s. 9d. As stated previously, the imported cattle were required principally for stud purposes.

7. Cattle Slaughtered.—The number of cattle slaughtered during each of the years 1919 to 1923 is given hereunder:—

CATTLE (INCLUDING CALVES) SLAUGHTERED, 1919 TO 1923.

Year.	N.S.W. (a)	Victoria.	Q'land.	S. Aust. (a)	W. Aust.	Tas.	N. Ter.	Fed. Cap. Ter. (a)	Total.
1919	593,859	362,475	461,197	85,978	55,056	15,753	23,286	138	1,597,742
1920	525,981	374,545	449,103	90,944	68,055	27,468	1,330	74	1,537,500
1921	631,699	331,707	499,992	95,323	54,640	33,566	2,445	90	1,649,462
1922	738,908	424,199	504,394	127,294	79,823	31,026	1,587	142	1,907,373
1923	752,376	461,958	566,452	140,979	90,833	33,729	2,500	113	2,048,940

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

8. Production and Consumption of Beef.—The production of beef in Australia during the three years ended 1923-24 was estimated at 942,939,000 lbs. per annum. The requirements of the local market absorbed 809,130,000 lbs., or nearly 86 per cent. leaving a balance of slightly more than 14 per cent., which was exported as frozen and canned beef. The annual consumption of beef per head of population in Australia averaged 143.70 lbs. compared with 68.00 lbs. in the United States of America, and 64.03 lbs. in the United Kingdom for the same period.

9. Export of Beef Preserved by Cold Process.—A large export trade in beef preserved by cold process is carried on by Australia in normal times, mainly with the United Kingdom, Egypt, and the Philippine Islands. The quantities so exported during the five years 1919-20 to 1923-24 were as follows:—

BEEF PRESERVED BY COLD PROCESS.—EXPORTS, AUSTRALIA, 1919-20 TO 1923-24.

Country to which Exported.	1919-20.	1920-21.	1921-22.	1922-23.	1923-24.	Total for 5 years.
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QUANTITY.

	lbs.	lbs.	lbs.	lbs.	lbs.	lbs.
United Kingdom ..	105,725,679	156,316,163	108,671,867	112,316,545	62,286,753	545,317,007
Egypt ..	6,616,637	10,202,633	1,904,187	5,228,357	3,242,520	27,194,334
Philippine Islands ..	2,928,722	2,479,724	8,093,851	4,780,134	8,442,695	26,725,126
Germany ..	2,366,035	3,305,162	2,392,991	17,321,705	5,437,988	22,759,693
Malaya (British) ..	2,104,769	2,437,135	554,698	2,215,561	1,908,621	12,188,370
Hawaiian Islands ..	..	3,096,341	..	2,089,605	230,274	7,416,481
Italy ..	..	..	..	67,315	8,511,922	11,675,578
Belgium ..	..	..	..	2,452,475	7,728,342	10,180,817
Hong Kong ..	467,974	849,904	610,785	511,417	1,444,881	3,884,961
Ceylon ..	405,347	530,636	322,010	458,739	319,546	2,034,278
United States ..	301,673	133,304	71,615	99,878	..	606,470
Other Countries ..	162,075	291,477	1,545,349	5,410,936	5,610,398	13,020,235
Total ..	121,078,911	179,642,479	124,167,353	152,950,667	105,163,940	683,003,350

BEEF PRESERVED BY COLD PROCESS.—EXPORTS, AUSTRALIA—continued

Country to which Exported	1919-20.	1920-21.	1921-22.	1922-23.	1923-24.	Total for 5 years.
VALUE.						
United Kingdom ..	£ 2,130,527	£ 3,302,283	£ 1,616,075	£ 1,285,049	£ 734,814	£ 9,068,748
Egypt ..	133,583	207,643	24,431	67,684	45,858	479,199
Philippine Islands ..	65,331	56,032	133,696	60,843	105,971	421,873
Germany ..	..	..	..	202,119	65,054	267,173
Malaya (British) ..	53,363	71,099	44,687	34,552	28,980	232,681
Hawallian Islands ..	62,818	77,784	7,280	28,412	3,955	180,249
Italy ..	..	62,575	..	842	115,819	179,236
Belgium ..	..	..	..	27,314	96,270	123,584
Hong Kong ..	10,426	18,553	11,117	6,771	19,537	66,404
Ceylon ..	11,539	13,478	6,111	8,455	6,405	45,988
United States ..	7,422	3,429	1,130	1,269	..	13,250
Other Countries ..	4,239	6,965	23,400	71,425	79,216	185,245
Total ..	2,479,248	3,819,841	1,867,927	1,794,735	1,301,879	11,263,630

During the five years under review the United Kingdom has been Australia's largest customer for frozen beef, and has taken more than 80 per cent. of the value of the total shipments. Egypt, the Philippine Islands and Malaya (British) ranked next in order of importance. The exporting States during 1923-24 were:—Queensland, 90,100,997 lbs., valued at £1,098,761; Western Australia, 10,646,717 lbs., valued at £135,938; New South Wales, 2,339,961 lbs., valued at £41,100; Victoria, 1,811,145 lbs., valued at £22,944; and South Australia, 265,120 lbs., valued at £3,136.

10. Beef Subsidy.—The prices ruling for frozen beef in England early in 1922 were so low that it became unprofitable to export Australian beef. A succession of good seasons had stocked the country to capacity, and the failure of the export treatment works to absorb the surplus greatly depressed the beef industry. In order to assist cattle growers, the Commonwealth Government in September, 1922, passed the Meat Export Bounties Act which provided for the payment of a subsidy of $\frac{1}{4}$ d. per lb. on all frozen or canned beef exported or placed in cool stores for export, and 10s. per head on live cattle exported for slaughter, from April to December, 1922. The granting of the subsidy was made conditional on reductions of $\frac{1}{4}$ d. per lb. being effected in both the cost of treating and of shipping the meat. The bounty was renewed in 1923 on similar conditions to those in 1922. Although the amount of the bounty was small, it gave an acceptable measure of relief to the cattle industry. Many of the works were able to operate, and more than 200,000 head of cattle were treated each year, which would otherwise have remained to accentuate the existing depression. The bounty paid during 1922 amounted to £117,245 17s. 5d. for frozen beef, and £4,521 10s. for live cattle, while in 1923 £137,939, including £1,039 paid in 1924-25, was distributed for frozen beef, and £3,632 for live cattle. The Government decided to discontinue the bounty on frozen and canned beef exported during the 1924 season, but the provision for live cattle exported for slaughter was again renewed, and £3,991 was paid in respect of such shipments.

§ 4. Sheep.

1. Initiation of the Pastoral Industry.—Fortunately for Australia, the suitability of its climate and general conditions for the production of a high class of wool was, at an early date in the history of its settlement, surmised and tested by Captain Macarthur, one of the pioneer sheep-breeders of New South Wales. To the energy of this enterprising pastoralist is due in large measure the rapid and extremely satisfactory development of Australia as a producer of fine wool, and, while it would appear that the introduction of the merino sheep into Australia was not due to Macarthur, a great deal of the credit for having successfully established the pastoral industry in Australia must certainly be his.

2. Distribution throughout Australia.—With the exception of a short period in the early sixties, when the flocks of Victoria outnumbered those of the mother State, New South Wales has maintained the lead in sheep-raising which naturally attached to it as the portion of Australia in which settlement was first effected. From 1878 to 1901, the number of sheep in New South Wales represented more than half the total for Australia, but in recent years the proportion has fallen away considerably.

Fluctuations in the number of sheep recorded for each year in Australia from 1860 onwards may be seen from the graph accompanying this chapter. Five marked periods of decline greatly reduced the numbers at successive intervals, but these losses were quickly regained, and, despite a decrease of 3½ million during the drought of 1922, the number reported in 1923 amounted to more than 80,000,000. Although final figures will not be available for some time, the preliminary reports received suggest that the number of sheep in Australia at the end of 1924 will reach and possibly exceed 85,000,000. In 1891 the number attained its maximum, viz., 106,421,068. There has been no approach to that figure in recent years, but it is generally considered that the flocks in 1891 were in excess of the reasonable sheep-carrying capacity of the country. The rapid growth of the frozen mutton and lamb industry precludes the building up of Australia's flocks to such large dimensions as heretofore, and it appears unlikely that the 1891 figure will be approached in the immediate future.

The number of sheep in the several States and Territories for each year from 1919 to 1923 was as follows:—

SHEEP.—NUMBER, 1919 TO 1923.

Year.	New South Wales. (b)	Victoria. (a)	Queensland.	South Australia. (b)	Western Australia.	Tasmania. (a)	Nor. Ter.	Fed. Cap. Ter. (b)	Total.
1919	29,077,514	14,422,745	17,379,332	6,014,565	6,697,951	1,781,425	8,811	171,739	75,554,082
1920	33,691,838	12,171,084	17,404,840	6,359,944	6,532,965	1,570,832	6,062	159,990	77,897,555
1921	37,025,716	12,325,818	18,402,399	6,257,052	6,506,177	1,551,273	6,349	151,686	82,226,470
1922	34,723,684	11,765,520	17,641,071	6,305,133	6,664,135	1,558,494	6,161	139,063	78,803,261
1923	37,407,013	11,059,761	16,756,101	6,596,875	6,595,867	1,557,716	4,728	132,400	80,110,461

(a) 1st March, year following.

(b) 30th June, year following.

3. Proportion in the Several States and Territories.—Particulars concerning the relative positions of the several States and Territories with respect to the total flocks of Australia during the years 1919 to 1923 are given hereunder:—

SHEEP.—PERCENTAGE IN EACH STATE, 1919 TO 1923.

Year.	N.S.W.	Victoria.	Q'land.	S. Aust.	W. Aust.	Tas.	N. Ter.	Fed. Cap. Ter.	Total.
	%	%	%	%	%	%	%	%	%
1919 ..	38.49	19.09	23.00	7.96	8.86	2.36	0.01	0.23	100.00
1920 ..	43.25	15.62	22.34	8.16	8.39	2.02	0.01	0.21	100.00
1921 ..	45.03	14.99	22.38	7.61	7.91	1.89	0.01	0.18	100.00
1922 ..	44.06	14.93	22.38	8.00	8.46	1.98	0.01	0.18	100.00
1923 ..	46.69	13.81	20.92	8.23	8.23	1.94	0.01	0.17	100.00

Apart from the effect of drought the percentage of sheep depastured in the different States changes little. The most noteworthy alteration was a gain of 8.20 per cent. in New South Wales at the expense of Queensland and Victoria. The percentage decrease in the latter State amounted to 5.28 as the result of a loss of 3,362,984 sheep since 1919.

4. Relation to Population.—The relation of the flocks of the several States and Territories to the population at the end of each year from 1919 to 1923 is as follows:—

SHEEP.—NUMBER PER HEAD OF POPULATION, 1919 TO 1923.

Year.	N.S.W.	Victoria.	Q'land.	S. Aust.	W. Aust.	Tas.	N. Ter.	Fed. Cap. Ter.	All States.
1919 ..	14.07	9.59	23.56	12.36	20.46	8.48	1.94	77.29	14.15
1920 ..	16.03	7.96	23.14	12.78	19.75	7.38	1.52	62.04	14.35
1921 ..	17.24	7.95	23.90	12.39	19.41	7.10	1.70	52.05	14.86
1922 ..	15.86	7.40	22.38	12.20	19.39	7.12	1.74	42.72	13.94
1923 ..	16.80	6.80	20.66	12.47	18.64	7.11	1.33	35.97	13.88

The ratio of sheep to population has declined since 1919, and the effects of dry seasons and the requirements of the frozen meat trade will make it difficult under present conditions to maintain the existing ratio in the future.

5. Comparison with other Countries.—As regards the size of its flocks, and the quantity and quality of wool produced, Australia has long occupied a leading position amongst the sheep-raising countries of the world. From estimates published in the Year Book of the International Institute of Agriculture it would appear that the approximate number of sheep in the world is in the neighbourhood of 550,000,000, to which total Australia contributes about 15 per cent. The following comparison taken mainly from the source indicated gives the latest available figures relative to the number of sheep in the principal wool-producing countries:—

SHEEP.—NUMBER IN VARIOUS COUNTRIES.

Country.	Date.	No. of Sheep (,000 omitted).	Country.	Date.	No. of Sheep (,000 omitted).
Australia ..	1923	80,110	Algeria ..	1923	8,991
Soviet Republics ..	1923	55,227	Bulgaria ..	1920	8,923
U.S. of America ..	1924	39,134	Brazil ..	1920	7,933
Argentine Republic ..	1922	36,209	Jugo-Slavia ..	1923	7,542
Union of South Africa ..	1921	31,730	French Morocco ..	1923	7,121
New Zealand ..	1924	23,585	Greece ..	1920	5,811
China ..	1916	22,232	Germany ..	1923	5,717
India (British) ..	1922	22,082	Chile ..	1922	4,569
United Kingdom ..	1923	21,156	Tanganyika Territory (a) ..	1923	3,940
Spain ..	1924	18,460	Portugal ..	1920	3,851
Uruguay ..	1923	17,510	Irish Free State ..	1924	3,128
Rumania ..	1923	12,481	Canada ..	1924	2,631
India (Native States) ..	1922	11,930	Kenya ..	1923	2,400
Italy ..	1919	11,754	French Soudan ..	1923	2,324
Peru ..	1922	11,334	Poland ..	1921	2,192
Turkey ..	1919	11,200	Syria ..	1923	2,047
France ..	1924	10,172			

(a) Including goats.

6. Oversea Imports and Exports of Sheep.—As in the case of cattle, the oversea exports of live sheep from Australia are of comparatively small importance. During the past five years the principal consignments of ordinary sheep have been made to Malaya (British) from the State of Western Australia. The purchases by South African and Japanese buyers at the Australian Stud Sheep Sales during recent years have opened up a regular export trade with these two countries in stud sheep, the bulk of which have been secured from the leading flocks of New South Wales, Victoria and South Australia. The following are particulars of the imports and exports for the years 1919–20 to 1923–24:—

SHEEP.—IMPORTS AND EXPORTS, AUSTRALIA, 1919–20 TO 1923–24.

Year.	Imports.		Exports.		Net Exports.	
	No.	Value.	No.	Value.	No.	Value.
		£		£		£
1919–20 ..	269	6,258	21,870	64,112	21,601	57,854
1920–21 ..	3,038	8,828	22,345	149,803	19,307	140,975
1921–22 ..	345	4,836	36,456	41,757	36,111	36,921
1922–23 ..	235	3,378	38,194	45,395	37,959	42,017
1923–24 ..	1,021	8,487	31,323	49,374	30,302	40,887

7. Sheep Slaughtered.—The number of sheep slaughtered in the several States during each of the years from 1919 to 1923 was as follows:—

SHEEP (INCLUDING LAMBS) SLAUGHTERED, 1919 TO 1923.

Year.	N.S.W. (b)	Victoria.	Q'land.	S. Aust. (b)	W. Aust.	Tas. (a)	Nor. Ter.	Fed. Cap. Ter.(b)	Total.
1919 ..	5,533,484	6,324,490	717,191	1,478,557	800,252	330,000	c100	3,800	15,187,874
1920 ..	3,847,498	4,244,798	461,449	1,058,977	839,963	387,346	c100	3,765	10,843,896
1921 ..	5,226,516	4,005,587	769,360	1,208,347	871,831	362,871	30	3,333	12,447,875
1922 ..	5,662,953	5,863,195	762,540	1,290,669	900,128	344,989	..	3,323	14,827,797
1923 ..	3,614,457	4,078,273	618,127	956,140	809,379	316,438	..	2,898	10,395,712

(a) Partly estimated.

(b) Year ended 30th June year following.

(c) Estimated.

8. **Production and Consumption of Mutton and Lamb.**—The annual production of mutton and lamb during the three years ended 1923–24 averaged 507,211,000 lbs., of which 405,373,000 lbs., or 79.9 per cent., was consumed locally, the balance of 21.1 per cent. being exported. The consumption of mutton and lamb in Australia during the same period amounted to 71.99 lbs. per head per annum, a figure considerably in excess of the consumption in the United Kingdom and the United States of America, where the quantity consumed amounted to 26.52 and 5.50 lbs. per annum respectively during the past three years.

9. **Exports of Mutton and Lamb Preserved by Cold Process.**—The export trade in mutton and lamb preserved by cold process grew rapidly until in 1913, the year immediately before the war, the value of the shipments amounted to nearly £3,000,000. The exports fell off considerably during the war years, but, resultant on the release of shipping space, coupled with the satisfactory prices realized in England, the record shipment of 246,971,346 lbs., valued at £5,482,564, was made in 1919–20. The dearth of supplies consequent upon the drought greatly diminished the consignments in 1920–21, but the trade expanded in 1921–22, and an exceptionally large volume of exports was despatched in 1922–23. The heavy export of the previous season and the losses due to adverse conditions, as well as a poor lambing, were responsible for the greatly reduced shipments during 1923–24. The position was further accentuated through the very high prices for wool causing graziers to be unwilling to dispose of anything that could grow a fair fleece. Considerable attention is paid to the breeding of a class of sheep that will best meet the requirements of consumers. Crosses between the Merino and the Lincoln, or between the Merino and the Leicester breeds have proved exceedingly valuable, as they furnish both a good quality of wool and an excellent carcass for export purposes. The breeding of Shropshire and Southdown sheep with a view to combining meat production with that of wool is also on the increase. Special attention is being paid to the raising of lambs, as it has become widely recognized that with suitable breeds the export trade in lambs is very profitable.

As in the case of frozen beef, the principal customer in this trade is the United Kingdom, which absorbed more than 95 per cent. of the total quantity exported from Australia during the last five years, while the balance was shipped mainly to Malaya (British), Egypt, Sweden, Hong Kong, and Ceylon.

MUTTON AND LAMB PRESERVED BY COLD PROCESS.—EXPORTS, AUSTRALIA, 1919–20 TO 1923–24.

Country to which Exported.	1919–20.	1920–21.	1921–22.	1922–23.	1923–24.	Total for 5 years.
QUANTITY.						
	lbs.	lbs.	lbs.	lbs.	lbs.	lbs.
United Kingdom ..	239,154,276	47,792,058	88,631,613	162,653,301	35,906,594	574,227,842
Malaya (British) ..	1,102,658	1,228,087	1,089,985	1,106,778	846,641	5,374,149
Egypt ..	..	2,744,246	178,380	984,473	463,332	4,370,431
Sweden ..	2,119,602	1,217,551	..	..	..	3,337,153
Hong Kong ..	376,315	410,329	391,166	432,250	491,660	2,101,720
Ceylon ..	383,518	393,214	396,880	340,484	415,729	1,934,825
Union of South Africa ..	1,578,839	193,709	72,920	179,226	156,102	2,180,796
Philippine Islands ..	595,312	237,264	289,294	208,910	184,482	1,515,282
Canada ..	273,047	37,427	329,030	203,315	251,046	1,093,865
United States ..	148,304	124,535	..	..	..	272,839
Other Countries ..	1,239,475	510,401	335,731	1,503,824	999,763	4,589,194
Total ..	246,971,346	54,893,821	91,714,999	167,612,561	39,805,349	600,998,076

VALUE.

	£	£	£	£	£	£
United Kingdom ..	5,292,542	1,393,179	2,073,276	4,205,189	1,067,571	14,031,757
Malaya (British) ..	30,599	36,980	24,750	28,531	25,067	145,927
Egypt ..	..	64,409	3,514	18,825	11,021	97,769
Sweden ..	49,303	29,805	..	..	..	79,108
Hong Kong ..	10,201	12,352	2,690	12,104	14,969	58,316
Ceylon ..	10,401	11,784	7,781	8,872	12,296	51,134
Union of South Africa ..	34,788	4,535	1,029	3,710	4,167	48,229
Philippine Islands ..	14,709	6,595	6,347	5,740	5,486	38,877
Canada ..	8,675	955	7,422	3,944	6,216	27,212
United States ..	3,603	4,684	..	..	..	8,287
Other Countries ..	27,743	13,380	6,806	35,002	24,057	106,988
Total ..	5,482,564	1,578,858	2,139,615	4,321,917	1,170,850	14,693,604

§ 5. Wool.

1. **Importance of Wool Production.**—Wool is the chief factor in the pastoral wealth of Australia, the value of the output for the season ended 30th June, 1924, being about £59,078,000. The bulk of the production is exported, but with the greater activity of the local woollen mills there has, in recent years, been an increasing quantity used in Australia, although even now the quantity so used represents only about 8 per cent. of the whole clip.

2. **Greasy and Scoured Wool.**—For the purpose of comparing the clips as a whole for a series of years, it is convenient to have the total production expressed in terms of greasy wool.

The quantity of Australian wool scoured and washed before export during recent years has been on the average about 15 per cent. of the total quantity shipped. The loss of weight in scouring varies largely with season, locality, breed, and condition. It seems preferable to express "scoured and washed" wool in terms of "greasy" rather than vice versa, since the absolute error arising from uncertainty as to average loss of weight is thereby minimized.

In the tables dealing with production, "scoured and washed" wool has been converted into the estimated equivalent amount of "greasy" on the assumption that two pounds of "greasy" wool are on the average required to produce one pound of "scoured and washed."

3. **Production.**—(i) *Total.* The estimated production of wool in the several States, formerly based on the Customs returns, being no longer available from that source, an effort has been made to arrive at approximate figures from data collected by the State Statisticians from growers, fellmongers, etc. Particulars for years prior to 1919-20 will be found in earlier issues of the Year Book. The following table gives the estimates obtained for the five seasons ended 30th June, 1920 to 1924 :—

WOOL.—TOTAL PRODUCTION, 1919-20 TO 1923-24.

State.	1919-20.	1920-21.	1921-22.	1922-23.	1923-24.
	lbs.	lbs.	lbs.	lbs.	lbs.
New South Wales (a)	296,641,000	240,231,000	285,418,000	293,571,000	271,008,000
Victoria ..	132,847,167	90,250,571	103,512,777	102,467,950	82,513,361
Queensland ..	118,035,461	114,809,963	132,579,733	134,971,150	121,913,075
South Australia ..	58,306,918	48,953,503	54,038,262	54,929,801	57,598,083
Western Australia ..	46,299,381	43,714,630	46,301,039	44,139,138	48,055,393
Tasmania ..	11,069,237	9,503,048	9,634,624	10,218,550	9,712,273
Northern Territory (b)	50,000	40,000	30,000	20,000	20,000
Total ..	663,249,164	547,502,715	631,514,435	640,317,589	590,820,185

(a) Including Federal Capital Territory.

(b) Approximate figures.

In connexion with the above figures compiled from growers' returns, a deficiency is apparent when comparisons are made with totals obtained from oversea shipments plus local consumption. Owing to the dislocation of shipping and the amount of carry-over wool held in Australia it was not possible to estimate the shortage during the war and post-war years, but the complete records published by the Central Wool Committee during its period of control show an average annual production of 721,000,000 lbs. for the three seasons ended 1920, compared with 631,000,000 lbs. as compiled from the replies of the growers, the deficiency in the latter compilation amounting to 12½ per cent.

A careful estimate, based on shipping and manufacturers' returns, reduced the extent of the shortage in 1923-24 to 7½ per cent., the estimated production so obtained amounting to 640,000,000 lbs. A special effort will be made by the Government Statistician in each State in 1924-25 to obtain full returns from the wool-growers.

(ii) *Weight and Value per Sheep Shorn.* The weight and value of wool per sheep shorn in the past five seasons are shown in the following table:—

WOOL.—WEIGHT AND VALUE PER SHEEP SHORN, 1919-20 TO 1923-24.

Season ended 30th June—		N.S.W.	Vic.	Q'land.	S. Aust.	W. Aust.	Tas.	All States.
WEIGHT.								
		lbs.	lbs.	lbs.	lbs.	lbs.	lbs.	lbs.
1920	.. ..	7.03	6.38	6.59	7.89	5.71	5.32	6.73
1921	.. ..	6.93	5.77	7.03	7.56	5.76	5.19	6.65
1922	.. ..	7.49	6.23	7.57	7.70	6.19	5.77	7.18
1923	.. ..	7.24	6.25	6.99	7.58	5.82	5.86	6.91
1924	.. ..	7.14	6.08	6.66	8.37	6.42	5.53	6.86
VALUE.								
		s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.
1920	.. ..	8 10	8 4	9 3	9 3	7 1	8 3	8 9
1921	.. ..	7 11	7 10	8 9	8 6	6 3	7 3	8 0
1922	.. ..	8 1	6 11	8 11	7 8	6 5	6 8	7 10
1923	.. ..	10 9	9 8	11 3	11 3	9 0	10 6	10 7
1924	.. ..	14 3	13 1	13 3	15 4	12 4	13 5	13 9

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 that one clip may include almost thirteen months' growth of wool, while the succeeding one may include little more than eleven months' growth.

5. *World's Wool Production.*—The following table compiled by the Textile Division of the United States Department of Commerce shows the importance of Australia as a wool-producing country. Out of a total production of 2,797,327,000 lbs. in 1923, Australia's contribution amounted to 590,820,000 lbs., or more than 21 per cent. of the world's supply.

WOOL(a).—WORLD'S PRODUCTION, 1922 AND 1923.

Countries.	Average Annual Pre-War Production.(b)	Production.	
		1922.	1923.(c)
North America—	lbs.	lbs.	lbs.
United States	313,648,000	264,560,000	266,110,000
Canada	11,210,000	19,125,000	15,539,000
Mexico	7,000,000	792,000	780,000
Total	331,858,000	284,477,000	282,429,000
Central America and West Indies	1,000,000	750,000	750,000
South America—			
Argentine Republic ..	358,688,000	231,483,000	297,000,000
Brazil	35,000,000	23,800,000	23,800,000
Chile	17,430,000	38,500,000	38,500,000
Peru	9,940,000	10,000,000	10,000,000
Falkland Islands	4,324,000	3,200,000	3,200,000
Uruguay	156,968,000	92,000,000	96,000,000
All other	5,000,000	5,000,000	5,000,000
Total	587,350,000	403,983,000	473,500,000

(a) Computed on "greasy" basis. (b) Average for years 1909 to 1913 inclusive. (c) Where 1923 figures were not obtainable, an earlier figure or an unofficial estimate has been inserted.

WOOL(a).—WORLD'S PRODUCTION, 1922 AND 1923—*continued*.

Countries.	Average Annual Pre-War Production.(b)	Production.	
		1922.	1923.(c)
	lbs.	lbs.	lbs.
Europe—			
Austria	15,360,000	1,250,000	1,323,000
Belgium	1,060,000	825,000	825,000
Bulgaria	23,700,000	25,000,000	25,000,000
Czecho-Slovakia .. ..	..	4,303,000	4,303,000
Denmark	3,508,000	1,323,000	1,323,000
Estonia .. ..	..	13,224,000	3,150,000
Finland .. ..	..	7,500,000	7,500,000
France	80,688,000	38,220,000	41,777,000
Germany	25,600,000	51,809,000	53,500,000
Greece	14,000,000	13,420,000	13,000,000
Hungary	17,637,000	9,370,000	13,779,000
Iceland	1,980,000	1,980,000	1,980,000
Italy	55,000,000	50,000,000	55,000,000
Jugo-Slavia	25,446,000	24,251,000	35,000,000
Netherlands	3,556,000	4,400,000	5,100,000
Norway	8,160,000	4,409,000	5,200,000
Poland .. ..	..	6,725,000	5,839,000
Portugal	10,000,000	7,717,000	6,000,000
Rumania	13,228,000	48,000,000	52,910,000
Russia	320,000,000	150,000,000	150,000,000
Spain	52,000,000	88,000,000	90,364,000
Sweden	6,060,000	6,613,000	6,000,000
Switzerland	1,049,000	800,000	780,000
Turkey	28,000,000	..	..
United Kingdom	134,000,000	103,217,000	102,300,000
All other .. ..	..	5,000,000	5,000,000
Total	840,032,000	667,356,000	686,953,000
Asia—			
British India	60,000,000	60,000,000	65,000,000
China	50,000,000	61,320,000	78,000,000
Persia	12,146,000	12,146,000	18,000,000
Russia in Asia	60,000,000	45,000,000	45,000,000
Turkey in Asia	90,000,000	60,000,000	60,000,000
All other	1,000,000	1,000,000	1,000,000
Total	273,146,000	239,466,000	267,000,000
Africa—			
Algeria	35,221,000	35,155,000	35,155,000
British South Africa	157,761,000	187,000,000	180,000,000
Tunis	3,735,000	6,765,000	6,765,000
Morocco	14,850,000	19,175,000	19,976,000
All other	30,000,000	30,000,000	30,000,000
Total	241,567,000	278,095,000	271,896,000
Oceania—			
Australia	700,193,000	631,514,000	590,820,000
New Zealand	198,474,000	214,706,000	208,979,000
Total	898,667,000	846,220,000	799,799,000
Total all other Countries	13,000,000	15,000,000	15,000,000
GRAND TOTAL	3,186,620,000	2,735,347,000	2,797,327,000

(a) Computed on "greasy" basis. (b) Average for years 1909 to 1913 inclusive. (c) Where 1923 figures were not obtainable, an earlier figure or an unofficial estimate has been inserted.

6. Wool Locally Used.—The quantity of wool used in the woollen and tweed mills of the various States during the past five years was approximately as follows:—

**WOOL.—GREASY, USED IN LOCAL WOOLLEN AND TWEED MILLS,
1919-20 TO 1923-24.**

State.	1919-20.	1920-21.	1921-22.	1922-23.	1923-24.
	lbs.	lbs.	lbs.	lbs.	lbs.
New South Wales	7,054,962	7,206,896	6,648,224	4,882,740	4,895,206
Victoria	11,360,400	12,799,593	13,233,011	15,926,225	13,068,646
Queensland	634,376	556,232	1,822,494	1,358,888	1,317,621
South Australia	693,297	683,779	608,098	621,265	586,800
Western Australia					
Tasmania	997,542	1,129,722	1,043,706	1,502,060	963,369
Total	20,680,577	22,376,222	23,415,533	24,291,178	20,831,644

The total consumption of wool in Australia cannot be given, as particulars in respect of wool-combing and knitting establishments are not collected in all the States. An estimate, based upon the available particulars and the purchases made by manufacturers at local wool sales, places the figure in the vicinity of 50,000,000 lbs.

7. Exports of Wool.—(i) *Greasy—Quantities.* Prior to the war, about 31 per cent. of the exports of wool from Australia was despatched to the United Kingdom, whereas the shipments for the same destination during the past five years have averaged nearly 54 per cent. The other leading consignees during the latter period were France, Belgium, United States of America, Japan, Italy and Germany, the principal continental countries taking 33 per cent., and America and Japan 12½ per cent. of the total shipments. The following table shows for the years 1919-20 to 1923-24 the quantities of "greasy" wool exported, and the principal countries of destination:—

WOOL IN THE GREASE.—EXPORTS, AUSTRALIA, 1919-20 TO 1923-24.

Country to which Exported.	1919-20.	1920-21.	1921-22.	1922-23.	1923-24.	Total for 5 years.
	lbs.	lbs.	lbs.	lbs.	lbs.	lbs.
United Kingdom	397,688,435	283,583,260	337,775,993	259,230,707	163,169,820	1,441,448,215
France	32,243,017	32,484,058	138,751,611	137,742,458	121,268,001	460,489,145
Belgium	39,189,760	26,021,710	55,690,271	34,180,045	48,011,894	203,093,680
United States of America	28,326,008	34,291,220	45,778,371	50,234,655	31,909,668	190,539,922
Japan	8,928,971	9,856,174	50,775,592	50,043,561	45,455,153	165,059,451
Italy	44,597,155	15,975,186	39,629,626	28,646,259	25,143,698	153,991,924
Germany		8,715,299	39,330,067	32,940,661	31,422,309	112,908,336
Netherlands		884,634	636,378	3,017,462	14,091,947	18,630,421
Canada		362,915	1,619,372	1,184,321	697,794	3,864,402
India		381,516	613,701	296,164	1,598,944	2,890,325
Other Countries	1,360,782	5,344,064	1,619,731	807,697	1,196,811	10,329,085
Total	552,334,128	417,900,036	710,720,713	598,323,990	483,966,039	2,763,244,906

(ii) *Scoured and Washed—Quantities.* Similar particulars concerning the exports of "scoured and washed" wool are as follows:—

WOOL, SCOURED AND WASHED(a).—EXPORTS, AUSTRALIA, 1919-20 TO 1923-24.

Country to which Exported.	1919-20.	1920-21.	1921-22.	1922-23.	1923-24.	Total for 5 years.
	lbs.	lbs.	lbs.	lbs.	lbs.	lbs.
United Kingdom	70,454,411	43,100,738	65,815,973	75,505,841	24,664,470	279,541,433
Belgium	13,931,527	10,648,048	16,153,469	3,938,725	3,749,960	48,421,729
France	105,177	1,544,101	13,271,181	13,533,782	8,461,502	36,905,803
Japan	3,676,467	3,719,499	5,051,529	6,435,286	5,010,121	23,892,902
United States of America	2,600,657	6,490,418	1,880,728	4,588,736	449,143	16,009,682
Germany		279,822	3,209,868	6,006,516	2,469,208	11,965,414
Italy		568,690	1,500,550	1,005,988	490,020	3,565,248
Canada	125,717	438,254	1,133,766	823,238	582,580	3,103,555
Netherlands		9,845		577,066	957,687	1,544,598
India		130,260	48,831	13,513	233,934	426,538
Other Countries	156,820	1,194,703	493,456	345,876	297,967	2,488,822
Total	91,050,776	68,124,378	108,559,351	112,774,567	47,356,652	427,865,724

(a) Including "tops."

The figures for "scoured and washed wool" include tops, amounting in 1919-20 to 6,148,118 lbs., valued at £2,957,679; in 1920-21, 6,598,681 lbs., valued at £2,049,588, in 1921-22, 6,200,505 lbs., valued at £1,207,048, in 1922-23, 6,374,922 lbs., valued at £1,412,683, and in 1923-24, 4,988,258 lbs., valued at £1,161,920. The total exports of wool tops during the last five years amounted to 30,310,484 lbs., valued at £8,788,918, of which 20,403,156 lbs., or more than 67 per cent., were shipped to Japan.

(iii) *Total Value of Exports.* The total value of the wool exported from Australia to the principal countries during the five years under review was:—

WOOL EXPORTS.—TOTAL VALUE, AUSTRALIA, 1919-20 TO 1923-24.

Country to which Exported.	1919-20.	1920-21.	1921-22.	1922-23.	1923-24.	Total for 5 years.
	£	£	£	£	£	£
United Kingdom ..	37,256,915	21,889,438	23,013,128	25,901,608	20,136,750	128,197,839
France ..	2,352,749	1,357,358	6,842,265	10,408,195	12,278,938	33,239,505
Japan ..	2,010,732	2,107,473	4,438,672	6,095,616	6,212,881	20,865,374
United States of America	2,516,142	3,838,987	4,347,360	5,618,652	4,323,239	20,642,380
Belgium ..	3,356,349	2,380,519	3,784,065	2,514,717	4,951,127	16,986,777
Italy ..	2,832,951	1,164,280	2,667,081	2,498,733	2,634,990	11,798,035
Germany ..	..	364,196	2,404,833	3,448,031	3,576,436	9,793,496
Netherlands ..	..	46,348	44,388	347,698	1,625,493	2,063,927
Canada ..	63,520	79,588	245,321	184,365	154,323	727,217
India ..	..	45,198	50,243	11,487	123,550	230,478
Other Countries ..	154,445	509,375	139,787	109,662	179,431	1,092,700
Total ..	50,543,803	33,780,760	47,977,243	57,138,764	56,197,158	245,637,728

8. *Average Export Value.*—The average values per lb. of Australian greasy wool according to the export returns for the past five years have been as follows:—

AUSTRALIAN GREASY WOOL.—EXPORT VALUE PER LB., 1919-20 TO 1923-24.

Year	1919-20.	1920-21.	1921-22.	1922-23.	1923-24.
	d.	d.	d.	d.	d.
Average value per lb. ..	16.69	14.53	13.16	18.38	24.14

9. *Exports and Local Sales of Wool, States, 1923-24.*—About 86 per cent. of the wool grown in Australia is normally sold in the local markets prior to export. Buyers from the United Kingdom, France, Belgium, Germany, and other European countries, also from America, Japan, China, and India, attend the sales conducted in Sydney, Melbourne, Geelong, Brisbane, Adelaide, Perth, Hobart, and Launceston.

The following table shows the number of bales of wool exported overseas from each State during the season ended 30th June, 1924, and the number sold for shipment, for use in local woollen mills, for scouring, etc. As considerable quantities of wool grown in some States are sold in or shipped from others, these figures do not therefore show actual local production, but total overseas shipments and sales.

WOOL.—EXPORTS AND LOCAL SALES, SEASON 1923-24.

State.	Overseas Exports.		Local Sales.(a)	
	Bales.	%	Bales.	%
New South Wales ..	709,059	41.49	695,575	40.96
Victoria ..	393,794	23.05	(b)417,772	24.60
Queensland ..	290,926	17.02	276,906	16.31
South Australia ..	158,472	9.27	177,606	10.46
Western Australia ..	131,244	7.68	102,763	6.05
Tasmania ..	25,443	1.49	27,519	1.62
Total ..	1,708,938	100.00	1,698,141	100.00

(a) Including wool sold to local woollen mills, scourers, etc. (b) Including wool sold at Albury.

10. Exports and Local Sales of Wool, Australia, 1895 to 1924.—The number of bales of wool exported from Australia, and the number sold at local sales prior to shipment, or taken for local use from 1895 onwards are shown in the following table :—

WOOL.—EXPORTS AND LOCAL SALES, AUSTRALIA, 1895 TO 1924.

Year ended 30th June.				Overseas Exports.	Local Sales.(a)	Ratio of Wool sold locally to Exports.
				Bales.	Bales.	%
1895	..	..	..	1,595,652	817,333	51.22
1900	..	..	..	1,221,163	807,031	66.09
1905	..	..	..	1,218,969	926,940	76.04
1910	..	..	..	1,921,705	1,624,561	84.54
1911	..	..	..	1,975,378	1,642,555	83.15
1912	..	..	..	2,020,547	1,700,494	84.16
1913	..	..	..	1,718,486	1,518,650	88.37
1914	..	..	..	1,966,576	1,703,744	86.64
1922	..	..	..	2,579,484	2,226,758	86.33
1923	..	..	..	2,315,255	1,932,315	83.46
1924	..	..	..	1,708,938	1,698,141	99.37

(a) Including wool absorbed by local woollen mills and wool-scouring establishments.

The steady development of the Australian wool market is clearly shown in this table. In the nineteen years ended 1914, the quantity sold locally more than doubled, and the ratio of wool sold locally to that exported increased from 51 per cent. in 1895 to over 86½ per cent. in the season ended 30th June, 1914. Particulars for the years 1915 to 1921 are not comparable owing to the abnormal conditions arising from the war, but the figures for the two selling seasons ended 30th June, 1923, indicate a return to normal, especially when allowance is made for the shipment of "Bawra" wool already appraised in previous seasons. The unusually high percentage of wool sold before shipment in 1924 was largely accounted for by the excellent selling conditions in Australia, but the ratio of sales to shipments was somewhat vitiated by the overlapping of the respective seasons, and the inclusion in the sales of wool for local consumption.

11. Quantities of Various Descriptions of Wool Sold in Each State.—The quantities and ratios of the various descriptions of wool marketed in each State are given in the following table :—

WOOL.—LOCAL SALES, DESCRIPTIONS, 1923-24.

Description of Wool.	N.S.W.	Victoria. (a)	Q'land.	S. Aust.	W. Aust.	Tasmania.	Total.
	Bales.	Bales.	Bales.	Bales.	Bales.	Bales.	Bales.
Greasy ..	644,502	410,254	245,620	174,895	101,213	27,503	1,603,987
Scoured ..	51,073	7,518	31,286	2,711	1,550	16	94,154
Total ..	695,575	417,772	276,906	177,606	102,763	27,519	1,698,141
Fleece, etc. ..	672,204	394,537	266,764	167,346	95,920	26,395	1,623,166
Lambs' ..	23,371	23,235	10,142	10,260	6,843	1,124	74,975
Total ..	695,575	417,772	276,906	177,606	102,763	27,519	1,698,141
Merino ..	583,587	230,020	274,717	170,653	97,898	6,481	1,363,356
Crossbred and all strong breeds ..	111,988	187,752	2,189	6,953	4,865	21,038	334,785
Total ..	695,575	417,772	276,906	177,606	102,763	27,519	1,698,141

(a) Including wool sold at Albury.

WOOL.—LOCAL SALES, DESCRIPTIONS, 1923-24—*continued*.

Description of Wool.	N.S.W.	Victoria. (a)	Q'land.	S. Aust.	W. Aust.	Tasmania.	All States.
	%	%	%	%	%	%	%
Greasy	92.66	98.20	88.70	98.47	98.49	99.94	94.46
Scoured	7.34	1.80	11.30	1.53	1.51	0.06	5.54
Total	100.00	100.00	100.00	100.00	100.00	100.00	100.00
Fleece, etc. ..	96.64	94.44	96.34	94.22	93.34	95.92	95.58
Lambs'	3.36	5.56	3.66	5.78	6.66	4.08	4.42
Total	100.00	100.00	100.00	100.00	100.00	100.00	100.00
Merino	83.90	55.06	99.21	96.09	95.27	23.55	80.29
Crossbred and all strong breeds ..	16.10	44.94	0.79	3.91	4.73	76.45	19.71
Total	100.00	100.00	100.00	100.00	100.00	100.00	100.00

(a) Including wool sold at Albury.

The great bulk of wool is marketed in the greasy state. Buyers still show a decided preference for wool in the grease, and the proportion of such wool sold during the 1923-24 season amounted to over 94 per cent. Of fleece and lambs' wool, the former represented 95.58, and the latter 4.42 per cent. The class of wool produced is largely merino, which is almost exclusively grown in the northern, western, and central parts of the continent, the bulk of the merino wool dealt with in Victoria coming from Riverina and other parts of New South Wales. The development of the frozen mutton and lamb export trade and the resultant raising of a type of sheep suitable for both mutton and wool led to a considerable increase in the production of crossbred wool throughout Australia during recent years. The percentage of such wool sold on the total sales amounted to 18.6 per cent. in 1912, whereas, eight years later, in 1919-20, it had increased to 33.9 per cent. The accumulation of large stocks of coarse wools after the war, and the consequent slump in prices induced many flock-masters to return to merino, and the percentage thereof sold in the local market increased from 66.11 in 1919-20 to 80.29 in 1923-24, while crossbred declined from 33.89 to 19.71 per cent. during the same period. The requirements of the frozen mutton and lamb trade, and the advance of closer settlement with its preference for crossbred sheep-raising in conjunction with wheat-growing or mixed farming, will compel the maintenance of the crossbred flocks; still, the extraordinary demand for fine wool at remunerative rates must influence the Australian flockmasters to concentrate in the future on the production of merino wool and its close counterparts comeback and fine crossbred.

12. Percentages of Various Descriptions of Wool Sold in each State.—The following table gives the percentage of each description of wool sold in the several States on the total sold in Australia during the season 1923-24 :—

WOOL.—LOCAL SALES, PERCENTAGES OF DESCRIPTIONS, 1923-24.

Description of Wool.	N.S.W.	Victoria.	Q'land.	S. Aust.	W. Aust.	Tasmania.	Total.
	%	%	%	%	%	%	%
Greasy	40.18	25.58	15.31	10.90	6.31	1.72	100.00
Scoured	54.24	7.98	33.23	2.88	1.65	0.02	100.00
Fleece, etc. ..	41.41	24.31	16.43	10.31	5.91	1.63	100.00
Lambs'	31.17	30.99	13.53	13.68	9.13	1.50	100.00
Merino	42.81	16.87	20.15	12.52	7.18	0.47	100.00
Crossbred and all strong breeds ..	33.45	56.08	0.65	2.08	1.45	6.29	100.00

The bulk of the crossbred wool of Australia is grown in Victoria and the southern parts of New South Wales; Tasmania, where crossbred sheep largely predominate, coming next in order, followed by small consignments from South Australia and Western Australia. In Victoria and New South Wales a noticeable feature of the past three seasons has been a general fining-up of the medium and coarse crossbreds by the use of merino and Corriedale rams. Australian pastures and climate are naturally more adapted for the growth of a larger proportion of fine crossbred wool than the River Plate, South Africa, and other wool-growing countries, and it is probable that this process of refinement will lead ultimately to the abandonment of coarse wool-growing in Australia.

13. The Wool Market. (i) *The 1923-24 Season.* The 1923-24 wool-selling season was remarkable for the excellent realizations, despite the many disturbing factors. The financial disorganization in Europe, the effects of the Japanese earthquake, and the paucity of the English and American demand depressed the opening sales; yet, not only was the high level of the previous season maintained from the outset, but prices rose steadily and consistently until records were established which were remarkably gratifying to producers. The explanation of the results achieved lies in the fact that the world's wool consumption has overtaken production. This actually happened some years ago, but the true position was disguised by the accumulation of surplus wool from the Wool Acquisition Scheme, which was available to supplement the current production. Other contributing factors were, of course, the shortage in the Australian production, the dearth of cotton, and the activity in textile-manufacturing centres.

The 1923-24 clip was light in supply, being grown under generally unfavourable conditions. The bulk of the staple was short and thinly grown with a dusty tip, but it was noteworthy for its fine quality and the absence of vegetable matter, which, with its dry condition, fitted it for the continental market.

During the year the wool sold in Australia totalled 1,698,141 bales, and though this quantity represented a decrease of 234,174 bales on the previous season's sales, there was an increase in the amount realized of no less than £7,066,573, the returns aggregating a value of £53,305,374 as compared with £46,238,801 in the previous year. The average price per bale was £31 7s. 10d., which, considering that it included every description of wool, is a remarkable figure, and constitutes a record for the Australian sales. Not only did prices for the finest wools reach their maxima, but average wools shared in the extraordinarily keen demand, and every description sold at higher rates than at any previous sale. Altogether the demand was keener and wider, and prices generally more satisfactory than at any previous time in the history of Australian wool-selling.

Although exceptionally high prices were realized for all descriptions of wool during the 1923-24 season, the actual top price for greasy merino was 3d. per lb. below the record of 1920-21, when 49½d. was reached. The season's record for merino fleece was 46½d., reached by the Plains brand sold in Geelong market, a centre which has now secured premier position at Australian wool sales for four successive seasons. With the exception of greasy and scoured merino fleece, new records were established in all descriptions, while the record for the latter class was equalled. The Geelong market excelled in highest prices, securing no less than ten records, whilst Brisbane obtained four, Sydney three, and Melbourne one. The highest prices for the past nine seasons for wools sold at auction, or fixed by appraisement at selling centres in Australia, are as follows:—

RECORD PRICES OBTAINED FOR WOOL IN AUSTRALIAN MARKETS, 1915-16 TO 1923-24.

Description.	Price.	Brand.	Bales.	Selling Centre.	Season.
Greasy merino :	d.				
Fleece ..	49½	Ware (conj.) ..	5	Geelong ..	1920-21
Broken ..	38½	Melville Forest ..	12	Geelong ..	1923-24
Pieces ..	37½	LLG/Mylora ..	10	Sydney ..	1923-24
		Spring Gully/JL/Wagga	8	Sydney ..	1923-24
		Blythvale ..	14	Geelong ..	1923-24
Bellies ..	35½	Rockview/JW ..	6	Melbourne ..	1923-24
		Wurrook ..	8	Geelong ..	1923-24
Locks ..	22½	T/Binda ..	1	Sydney ..	1923-24
		Wattle Grove/M ..	6	Geelong ..	1923-24
		V (reversed) over W/ Pen-	5	Brisbane ..	1923-24
		lan Downs (in ½ circle)			
Lambs' ..	43½	Ware (conj.) ..	2	Geelong ..	1923-24
Greasy comeback :					
Fleece ..	42½	WTA/Boorook ..	10	Geelong ..	1923-24
		DR/Blackwood ..	13	Geelong ..	1923-24
		Mount Fyans ..	8	Geelong ..	1923-24
Lambs ..	37	Beggs/Bochara ..	4	Geelong ..	1923-24
Greasy crossbred :					
Fleece ..	39½	Mooleric ..	5	Geelong ..	1923-24
Lambs ..	30½	Mooleric ..	—	Geelong ..	1923-24
Scoured merino :					
Fleece ..	64	WG/Kedron ..	58	Brisbane ..	1920-21
		RM/Ardbrin ..	65	Brisbane ..	1923-24
Pieces ..	59½	RM/Ardbrin ..	29	Brisbane ..	1923-24
Lambs ..	54	C. Shaw / Fairlea / Julia	1	Brisbane ..	1923-24
		Crk.			
Scoured crossbred :					
Fleece ..	52	Tomslake ..	9	Sydney ..	1923-24

Although 49½d. represents the highest price received for Australian greasy wool at recent Australian sales, the record price, according to "Dalgety's Annual Wool Review," for such wool in modern times was 109d. secured in London for the Geelong wool "NC" in February, 1920, while a line of scoured wool sold at London in March, 1920, realized 136d. per lb. In the early days John Macarthur sold wool at 126d. per lb., and in 1827 the "Sydney Gazette" contained an authentic record of Macarthur having secured 196d. per lb. for a single bale of the historic "J M'A" brand. Macarthur therefore not only played an important part in the founding of Australia's staple industry, but established a record that is still unbeaten.

(ii) *Wool Realization Scheme.* The British Australian Wool Realization Association Ltd. ("Bawra") was formed on the 27th January, 1921, for the purpose of selling in conjunction with the existing clip 50 per cent. of the Australian carry-over wool acquired by the Association on account of the Australian growers; also to dispose of, as agents, all carry-over wools owned by the British Government and consisting of New Zealand, Falkland Islands, South African and 50 per cent. of Australian wools as promptly and to the best advantage as market conditions would permit, while at the same time contributing to stabilize the wool market which had become demoralized on the return to free wool sales. Towards the end of the year 1921, 80,550 bales of South African wool owned by the British Government were handed over to the Association for disposal under the Agency Agreement.

The marketing of B.A.W.R.A. wools was successfully carried out at various centres in England, and on the Continent, and the concluding auction sale took place at Liverpool on 2nd May, 1924, when the last bale of wool carried over from the Imperial Wool Purchase Scheme was disposed of. The whole of the wool controlled by B.A.W.R.A. amounting

to 2,691,756 bales was sold in three and a half years, and passed into consumption together with the current clips of the wool-growing countries. The details of stocks and disposals are set out in the following table :—

STOCKS AND DISPOSALS OF B.A.W.R.A. WOOLS, 1st JANUARY, 1921—2nd MAY, 1924.

Description.	Stocks, 1st January, 1921.	Disposals.				
		1921.	1922.	1923.	To 2nd May, 1924.	Total Disposals, 1st January, 1921, to 2nd May, 1924.
	Bales.	Bales.	Bales.	Bales.	Bales.	Bales.
Australian :—						
Merino ..	904,180	484,031	345,710	73,694	89	903,524
Crossbred ..	931,825	176,199	274,632	319,146	162,297	932,274
New Zealand :—						
Merino ..	3,181	449	267	2,333	132	3,181
Crossbred ..	769,762	138,441	275,855	308,428	47,069	769,793
Falkland Islands	2,329	2,329	..	..	..	2,329
South African	(a)80,550	..	80,655	..	..	80,655
Grand Totals ..	2,691,827	801,449	977,119	703,601	209,587	2,691,756

(a) 1st January, 1922.

NOTE.—The differences in the totals of stocks and disposals is due to reclassification and reconditioning.

14. United Kingdom Importation of Wool.—The appended statement of the quantity and value of wool imported into the United Kingdom during the year 1923 from the principal wool-producing countries shows the important position which Australia occupies in the supply of wool to the mother country :—

WOOL.(a)—IMPORTS, UNITED KINGDOM, 1923.

Country from which imported.	Quantity.	Value.	Country from which Imported.	Quantity.	Value.
	lbs.	£		lbs.	£
Australia ..	308,031,400	21,308,760	Belgium ..	5,849,700	420,782
New Zealand ..	229,690,500	10,229,222	Peru ..	6,722,100	221,888
Union of South Africa ..	118,667,600	6,679,425	Uruguay ..	3,277,900	204,222
Argentina Re-public ..	52,595,500	2,199,947	Falkland Islands	3,835,400	178,800
India ..	93,564,900	1,961,498	Egypt ..	3,697,200	62,056
France ..	25,209,700	1,591,736	Other Countries	25,962,200	1,096,356
Chile ..	18,612,400	905,319			
United States of America ..	8,118,000	513,178	Total ..	903,834,500	47,573,189

(a) Greasy, Scoured, and Tops.

Of the importations of wool into the United Kingdom, Australian wool represented 34 per cent. of quantity and 45 per cent. of value, and New Zealand 25 per cent. of quantity and 22 per cent. of value. It is interesting to note that 765,986,900 lbs., valued at £40,974,713, were received from British Possessions, being 85 per cent. of the total weight imported and 86 per cent. of the total value.

§ 6. Trade in Hides and Sheepskins.

1. **Extent of Trade.**—In addition to the hides and sheepskins treated in the tanneries of the several States, a very considerable export trade is carried on, the value of cattle hides, calfskins, and sheepskins exported from Australia during the five years 1919-20 to 1923-24 amounting to £15,673,387, or an average of £3,134,677 per annum.

2. **Sheepskins with Wool.**—By far the largest item included in the amount mentioned in the preceding sub-section arises from the value of sheepskins with wool—the exports of which during the five years aggregated £10,529,196. The largest purchaser of sheepskins with wool is the United Kingdom, to which nearly 60 per cent. of the consignments were dispatched during the last five years. France ranked next in order of importance with 28½ per cent., while the remaining 12 per cent. was shipped principally to Belgium and the United States of America. The exports of sheepskins with wool during each of the years from 1919-20 to 1923-24 were as follows :—

SHEEPSKINS WITH WOOL.—EXPORTS, AUSTRALIA, 1919-20 TO 1923-24.

Particulars.	1919-20.	1920-21.	1921-22.	1922-23.	1923-24.	Total for 5 years.
Sheepskins (with wool) .. No.	6,046,122	4,478,853	7,270,660	9,610,335	7,063,988	34,469,958
Value £	1,967,354	1,155,643	1,346,582	2,948,489	3,111,128	10,529,196

3. **Sheepskins without Wool.**—In the case of sheepskins without wool the principal countries of consignment are the United States of America and the United Kingdom. These two countries were responsible for nearly 92 per cent. of the exports during the past five years, the purchases of the United States of America alone amounting to 68½ per cent. of the total shipments. Particulars concerning exports are as follows :—

SHEEPSKINS WITHOUT WOOL.—EXPORTS, AUSTRALIA, 1919-20 TO 1923-24.

Particulars.	1919-20.	1920-21.	1921-22.	1922-23.	1923-24.	Total for 5 years.
Sheepskins (without wool) .. No.	4,177,084	704,296	116,553	1,150,739	599,866	6,748,538
Value £	631,445	86,663	6,880	78,630	50,655	854,273

4. **Hides.**—(i) *Exports.* The export of Australian cattle hides, which fell away during the war years, is again assuming importance, and marked increases have taken place during the past three years. The trade is mainly with the United Kingdom and the United States of America, which countries took roughly one-half and one-fourth respectively of the total quantity exported during the past five years. Italy with 365,184, and Germany and Belgium with shipments amounting to 240,315 and 169,479 respectively were the next largest purchasers.

Particulars concerning the export of cattle hides during the past five years are as follows :—

CATTLE HIDES.—EXPORTS, AUSTRALIA, 1919-20 TO 1923-24.

Particulars.	1919-20.	1920-21.	1921-22.	1922-23.	1923-24.	Total for 5 years.
Cattle Hides .. No.	569,465	261,938	446,199	651,888	924,092	2,853,582
Value £	1,504,116	375,412	530,355	773,691	817,719	4,001,293

The calfskins exported during the years 1919-20 to 1923-24 numbered 613,838, valued at £288,625, shipped mainly to the United States of America, the value of the skins taken by that country averaging 83 per cent. of the total exports during the past five years. The annual export of horse hides is very small, and averaged only 1,351 hides, valued at £1,817.

(ii) *Imports.* The import trade in cattle hides and calfskins is expanding, the number annually imported on the average during the past five years amounting to 425,243. New Zealand supplies the great bulk of these importations, and shipments of limited quantities are also obtained from the Pacific Islands. The number and value of cattle hides, including calfskins, imported into Australia during the five years 1919-20 to 1923-24 are as follows :—

CATTLE HIDES.—IMPORTS, AUSTRALIA, 1919-20 TO 1923-24.

Particulars.	1919-20.	1920-21.	1921-22.	1922-23.	1923-24.	Total for 5 years.
Cattle Hides .. No.	205,662	313,442	451,373	675,471	480,265	2,126,213
Value £	579,915	500,460	433,014	541,079	533,539	2,588,007

The number of horse hides imported into Australia is unimportant. Imports during the last five years numbered 22,085, valued at £24,528.