

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 1919 onwards in single years, are given in the following table, and are shown continuously in the graphs hereinafter.

During the sixty-four years covered by the table the live stock of Australia increased considerably, horses 431 per cent., cattle 236 per cent., sheep 363 per cent., and pigs 179 per cent. The average annual increases which these aggregates represent are as follows :—Horses, 2.65 per cent. ; cattle, 1.91 per cent. ; sheep, 2.42 per cent. ; and pigs, 1.62 per cent.

LIVE STOCK.—AUSTRALIA, 1860 TO 1924.

Year.				Horses.	Cattle.	Sheep.(a)	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
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	..	..	..	2,390,469	14,336,673	78,803,261	985,930
1923	..	..	..	2,327,440	13,357,508	80,110,461	897,874
1924	..	..	..	2,292,050	13,309,473	93,154,953	980,009

(a) See note to Table in § 4. 2 hereinafter.

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.

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-four years in the manner shown in the succeeding table :—

LIVE STOCK PER HEAD OF POPULATION.—AUSTRALIA, 1860 TO 1924.

Year.	Horses.	Cattle.	Sheep.	Pigs.	Year.	Horses.	Cattle.	Sheep.	Pigs.
1860 ..	0.38	3.45	17.58	0.31	1919 ..	0.45	2.38	14.15	0.13
1870 ..	0.43	2.60	25.24	0.33	1920 ..	0.44	2.49	14.35	0.14
1880 ..	0.48	3.37	27.87	0.37	1921 ..	0.44	2.61	14.86	0.17
1890 ..	0.48	3.27	31.06	0.28	1922 ..	0.42	2.54	13.94	0.17
1900 ..	0.43	2.29	18.75	0.25	1923 ..	0.40	2.31	13.88	0.16
1910 ..	0.49	2.65	20.80	0.23	1924 ..	0.39	2.27	15.86	0.17

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 numbers of horses is in evidence since 1919.

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, 1925 ..	2.09	9.28	151.68	1.10
Victoria ..	1st March, 1925 ..	5.38	18.27	143.94	3.28
Queensland ..	31st Dec., 1924 ..	0.98	9.63	28.38	0.23
South Australia ..	31st Dec., 1924 ..	0.67	1.05	16.73	0.21
Western Australia ..	31st Dec., 1924 ..	0.17	0.77	7.04	0.08
Tasmania ..	1st March, 1925 ..	1.41	8.61	61.57	1.80
Northern Territory ..	31st Dec., 1924 ..	0.09	1.63	0.01	0.00
Fed. Cap. Territory ..	30th June, 1925 ..	1.48	5.38	176.37	0.31
Total ..	1924 ..	0.77	4.47	31.32	0.33

7. **Minor Classes of Live Stock.**—The numbers of minor classes of live stock returned for 1924 were as follows :—Goats, 231,258 ; camels, 11,853 ; mules and donkeys, 16,547 ; and ostriches, 674. 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 12,000 angora goats are included in the total of 231,258 goats shown above. Of these, 3,840 were in New South Wales, 917 in Tasmania, 1,695 in Western Australia, 1,674 in South Australia, and 3,511 in Queensland, while the quantity of mohair produced in the latter State in 1924 was set down at 1,782 lbs., and the number of skins placed on the market was returned as 519.

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 1920-21 to 1924-25 are as follows :—

NET EXPORTS OF PASTORAL PRODUCTS.—AUSTRALIA, 1920-21 TO 1924-25.

Products.	Unit of Quantity.	1920-21.	1921-22.	1922-23.	1923-24.	1924-25.
QUANTITIES.						
Animals (living)—						
Cattle	No.	4,396	9,110	13,818	-71	9,674
Horses	"	8,195	1,798	3,545	1,478	4,604
Sheep	"	19,307	36,111	37,959	30,302	4,143
Bones	cwt.	24,160	21,718	23,276	26,158	23,748
Glue-pieces and Sinews	"	-3,920	4,987	6,927	-1,993	-11,055
Glycerine	lb.	-854,254	19,348	343,292	-230,485	-489,113
Hair	"	100,434	-126,037	(a)	(a)	(a)
Hoofs	cwt.	7,580	10,615	11,174	10,380	8,340
Horns	"	(a)	(a)	(a)	(a)	(a)
Meats—						
Frozen Beef	lb.	170,618,149	124,158,191	152,925,321	105,145,255	283,584,278
Frozen Mutton and Lamb	"	54,892,764	91,712,280	167,578,967	39,768,347	50,224,659
Frozen Rabbits and Hares	pair	3,925,004	4,857,404	4,264,054	3,489,496	3,413,334
Frozen, Other	lb.	7,901,468	6,676,605	13,062,037	6,687,005	9,141,545
Potted, and Extract of	"	(a)	(a)	(a)	(a)	(a)
Preserved in Tins, etc.	lb.	8,296,500	9,133,860	10,583,164	4,268,814	8,687,019
Other (excluding Bacon and Ham)	"	482,317	344,107	489,564	234,058	314,867
Sausage Casings	cwt.	(a)	(a)	24,623	13,213	26,800
Skins—						
Hides	No.	-8,317	80,415	47,900	665,466	900,274
Sheep	"	5,117,431	6,780,522	10,237,162	6,891,162	6,016,231
Rabbit and Hare	cwt.	49,427	74,224	122,748	77,802	116,522
Other (including Undressed Furs)	"	(a)	(a)	(a)	(a)	(a)
Tallow	cwt.	524,220	893,772	1,016,831	394,313	855,596
Wool—						
Greasy	lb.	417,647,343	710,591,430	597,429,649	478,210,488	489,669,907
Scoured	"	61,525,697	102,346,835	106,319,965	41,735,194	39,221,259
Tops	"	6,598,681	6,200,505	6,374,922	4,988,258	4,090,958

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 £317,539,567 for the period, or an average of £63,507,913 per annum, of which wool represents 81 per cent. Meat, skins, and tallow rank next in order of importance.

NET EXPORTS OF PASTORAL PRODUCTS.—AUSTRALIA, 1920-21 TO 1924-25.

Products.	1920-21.	1921-22.	1922-23.	1923-24.	1924-25.
VALUES.					
Animals (living)—	£	£	£	£	£
Cattle	30,350	53,274	64,731	-31,430	43,626
Horses	137,497	-1,148	27,978	-36,741	28,062
Sheep	140,975	36,921	42,017	40,887	29,793
Bones	21,839	19,610	26,137	32,301	23,031
Glue-pieces and Sinews	302	7,883	13,725	21,688	10,363
Glycerine	-39,374	1,516	8,536	-5,965	-10,898
Hair	28,416	6,736	-62,830	-70,283	-73,556
Hoofs	8,180	7,120	8,137	7,723	6,011
Horns	29,609	34,418	35,388	32,888	47,216
Meats—					
Frozen Beef	3,819,094	1,867,681	1,704,104	1,301,304	4,138,729
Frozen Mutton and Lamb	1,578,634	2,139,537	4,320,977	1,169,667	1,520,655
Frozen Rabbits and Hares	432,745	407,143	321,320	320,442	310,683
Frozen, Other	190,795	128,451	189,170	95,127	165,002
Potted, and Extract of	9,649	-49,636	-40,170	-78,343	-49,953
Preserved in Tins, etc.	380,694	324,275	266,273	94,094	247,405
Other (excluding Bacon and Ham)	16,741	10,852	10,577	5,798	4,058
Sausage Casings	-43,160	128,127	285,504	154,068	208,673
Skins—					
Hides	-113,202	122,471	249,208	338,263	890,639
Sheep	1,228,012	1,305,223	2,973,146	3,057,789	3,773,328
Rabbit and Hare	968,972	784,346	1,061,777	1,348,508	2,482,933
Other (including Undressed Furs)	715,656	288,633	785,467	798,166	328,325
Tallow	1,347,400	1,440,683	1,612,676	745,200	1,703,308
Wool—					
Greasy	25,298,176	38,970,130	45,769,295	48,294,399	55,297,455
Scoured	6,426,167	7,795,146	9,898,651	6,298,197	6,524,471
Tops	2,049,588	1,207,048	1,412,683	1,161,920	1,119,849
Total Values	44,663,755	57,036,440	71,974,486	65,095,676	78,769,210

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 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 1918, 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, 1920 TO 1924.

Year.	N.S.W. (b)	Vic. (a)	Q'land.	S. Aust.	W. Aust.	Tas. (a)	N.T.	F.C.T. (b)	Total.
1920	661,846	487,503	741,024	6268,187	178,664	39,117	37,837	1,332	2,415,510
1921	668,501	496,124	746,281	6267,639	180,334	38,439	39,565	1,299	2,438,182
1922	658,686	494,947	713,015	6264,150	181,159	37,313	39,845	1,345	2,390,460
1923	656,939	486,075	660,387	6258,489	181,944	37,570	44,603	1,433	2,327,440
1924	646,110	473,236	659,023	255,022	175,116	37,091	45,059	1,393	2,292,050

(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 divisions of the Commonwealth, except Northern Territory, the decrease for Australia during the period amounting to 235,099.

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, 1920 TO 1924.

Year.	N.S.W.	Vic.	Q'land.	S. Aust.	W. Aust.	Tas.	N.T.	F.C.T.	Total.
	%	%	%	%	%	%	%	%	%
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
1924 ..	28.19	20.65	28.75	11.13	7.64	1.62	1.96	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, Victoria, 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 1920. Particulars for the past five years as follows :—

HORSES.—NUMBER PER HEAD OF POPULATION, 1920 TO 1924.

Year.	N.S.W.	Victoria.	Q'land.	S. Aust.	W. Aust.	Tas.	N. Ter.	Fed. Cap. Ter.	All States-
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
1924 ..	0.29	0.29	0.79	0.47	0.48	0.17	12.60	0.46	0.39

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	22,232	Cuba ..	1923	844
U.S. of America ..	1925	15,778	Sweden ..	1920	728
Argentine Republic ..	1921	9,432	Dutch East Indies	1922	721
Brazil ..	1920	5,254	Spain ..	1924	634
China ..	1916	4,401	Turkey ..	1919	630
Germany ..	1925	3,915	Uruguay ..	1919	555
Canada ..	1925	3,554	Denmark ..	1925	538
Poland ..	1921	3,290	Czecho-Slovakia ..	1921	529
France ..	1924	2,859	Colombia ..	1915	526
Australia ..	1924	2,292	Paraguay ..	1919	490
India (British and Native) ..	1924	2,156	Lithuania ..	1924	482
Rumania ..	1925	1,875	Finland ..	1924	403
Japan ..	1923	1,592	Bulgaria ..	1920	398
United Kingdom ..	1925	1,447	Mexico ..	1924	391
Jugo-Slavia ..	1925	1,106	Netherlands ..	1921	364
Italy ..	1919	990	Latvia ..	1924	340
Hungary ..	1925	876	Irish Free State ..	1925	335
Union of South Africa	1923	858	Chile ..	1922	329
			New Zealand ..	1925	327

6. **World's Totals.**—Several countries do not issue annual statistics of live stock, the information available consisting of censuses or estimates made at varying intervals. It is not possible, therefore, to give world aggregates for the different classes of stock year by year, nor to make a satisfactory comparison between the totals for consecutive years. In order, however, to give some idea of the latest position as regards live stock and the changes that have taken place as compared with pre-war years, the following information has been taken from the report issued by the International Institute of Agriculture. The list of countries included is fairly complete, but China, which possesses large numbers of horses, is omitted, also certain parts of Asiatic Russia, together with a few other countries. While for some countries the figures are the result of careful

enumeration, in the case of others they are merely approximate. The totals, therefore, can be regarded as a general indication only of the position at the dates shown. The figures for horses are as follows :—

HORSES.—WORLD'S TOTALS, 1913 AND 1924.

Continents, &c.	Number at the date nearest—		Increase (+) or Decrease (—) in 1924.	
	1913.	1924.	Actual Figures.	Percentages.
	,000	,000	,000	%
Europe	44,206	39,568	— 4,638	—10.5
North and Central America	27,631	26,945	— 686	— 2.5
South America	18,132	17,056	— 1,076	— 5.9
Asia	12,197	10,349	— 1,848	—15.2
Africa	1,661	1,984	+ 323	+19.4
Oceania	2,969	2,698	— 271	— 9.1
Total	106,796	98,600	— 8,196	— 7.7

The figures show a decrease in all cases except Africa, where the numbers are relatively small.

7. *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 20,976, valued at £585,353, or equal to an annual average of 4,195 for £117,071. The average export price for the period was £27 18s. 1d. Nearly 77 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 £316 17s. 10d., as compared with £27 18s. 1d. per head for the exports for the same period. The average number imported per annum was, however, only 271, and the average annual value, £85,941. The following table gives the imports, exports, and net exports of horses during each of the years from 1920–21 to 1924–25 :—

HORSES.—IMPORTS AND EXPORTS, AUSTRALIA, 1920–21 TO 1924–25.

Year.	Imports.		Exports.		Net Exports.	
	No.	Value.	No.	Value.	No.	Value.
		£		£		£
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
1924–25	356	132,652	4,960	160,714	4,604	28,062

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 objects 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 in Victoria, New South Wales, and Southern Queensland in particular, the portion of Australia in the temperate zone being the best adapted to this industry. On the other hand, 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 three years.

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

CATTLE.—NUMBER, 1920 TO 1924.

Year.	N.S.W. (b)	Victoria. (a)	Q'land.	S. Aust.	W. Aust.	Tas. (a)	Nor. Ter.	Fed. Cap. Ter. (b)	Total.
1920	3,367,880	1,575,159	6,455,067	(b)376,399	849,803	208,202	659,840	7,387	13,499,737
1921	3,538,240	1,750,369	7,047,370	(b)419,197	893,108	216,704	568,031	8,290	14,441,309
1922	3,244,905	1,785,660	6,955,463	(b)425,811	939,596	218,197	760,766	6,275	14,336,673
1923	2,932,437	1,591,367	6,396,514	(b)413,272	953,764	220,351	843,718	6,085	13,357,508
1924	2,871,196	1,605,554	6,454,653	400,423	891,584	225,740	855,285	5,058	13,309,473

(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 1920 to 1924 are given hereunder :—

CATTLE.—PERCENTAGE IN EACH STATE, 1920 TO 1924.

Year.	N.S.W.	Victoria.	Q'land.	S. Aust.	W. Aust.	Tas.	Nor. Ter.	Fed. Cap. Ter.	Total.
	%	%	%	%	%	%	%	%	%
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
1924	21.57	12.06	48.50	3.01	6.70	1.69	6.43	0.04	100.00

Queensland contains within its borders nearly one half of the cattle-herds of Australia. Despite decreases during recent years the percentage of cattle in Queensland on the total for Australia amounted to 48.50 in 1924. The largest relative gain since 1920 occurred in the Northern Territory, where the number has considerably increased during the past three seasons.

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, 1920 TO 1924.

Year.	N.S.W.	Victoria.	Q'land.	S. Aust.	W. Aust.	Tas.	Nor. Ter.	Fed. Cap. Ter.	All States.
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
1924 ..	1.27	0.97	7.73	0.74	2.45	1.03	237.75	1.69	2.27

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 and Native U.S. of America ..	1923 1925	143,175 59,829	Czecho-Slovakia ..	1920	4,391
Soviet Republics ..	1924	46,235	French Equatorial and West Africa ..	1923	4,165
Argentine Republic ..	1922	37,065	Irish Free State ..	1925	3,991
Brazil ..	1920	34,271	Dutch East Indies ..	1922	3,990
Germany ..	1925	17,183	Tanganyika Territory ..	1923	3,800
China ..	1921	15,973	Siam ..	1924	3,799
France ..	1924	14,025	Jugo-Slavia ..	1925	3,768
Australia ..	1924	13,309	Turkey ..	1919	3,740
Colombia ..	1922	9,428	New Zealand ..	1925	3,504
Union of South Africa ..	1923	9,315	Spain ..	1924	3,469
Canada ..	1925	9,307	Kenya ..	1924	3,211
Uruguay ..	1924	8,432	Denmark ..	1925	2,756
Poland ..	1921	8,063	Nigeria ..	1923	2,747
United Kingdom ..	1925	8,034	Sweden ..	1920	2,737
Madagascar ..	1923	7,367	Venezuela ..	1921	2,600
Italy ..	1919	6,239	Mexico ..	1924	2,188
Paraguay ..	1919	5,500	Austria ..	1923	2,162
Rumania ..	1925	5,049	Netherlands ..	1921	2,063
Cuba ..	1924	4,600	Rhodesia ..	1924	2,009

6. World's Totals.—The information in the appended table has been taken from the returns published by the International Institute of Agriculture at Rome. The figures given therein are subject to the limitations previously noted in respect to horses (See § 2. No. 6 ante.)

CATTLE.—WORLD'S TOTALS, 1913 AND 1924.

Continents, etc.	Number at the date nearest—		Increase (+) or Decrease (–) in 1924.	
	1913.	1924.	Actual Figures.	Percentages.
	,000	,000	,000	
Europe ..	129,695	137,102	+ 7,407	+ 5.7
North and Central America ..	79,074	89,440	+10,366	+13.1
South America ..	85,978	101,486	+15,508	+18.0
Asia ..	168,911	167,065	– 1,846	– 1.1
Africa ..	32,816	44,563	+11,747	+35.8
Oceania ..	13,841	17,269	+ 3,428	+24.8
Total ..	510,315	556,925	+46,610	+ 9.1

Compared with the returns for 1913, increases were recorded in 1924 in all divisions with the sole exception of Asia, where there was a decline of 1 per cent., due principally to the falling off in the figures for India and Asiatic Russia. The chief increases in percentages were shown by Africa and Australia.

7. **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 the purpose of breeding. Details are as follows :—

CATTLE.—IMPORTS AND EXPORTS, AUSTRALIA, 1920-21 TO 1924-25.

Year.	Imports.		Exports.		Net Exports.	
	No.	Value.	No.	Value.	No.	Value.
		£		£		£
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
1924-25 ..	70	2,318	9,744	45,946	9,674	43,628

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 £98 15s. 10d. per head, while the average value of the cattle exported during the same period was £6 4s. 11d. As previously stated, the imported cattle were required principally for stud purposes.

8. **Cattle Slaughtered.**—The number of cattle slaughtered during each of the years 1920 to 1924 is given hereunder :—

CATTLE (INCLUDING CALVES) SLAUGHTERED, 1920 TO 1924.

Year.	N.S.W. (a)	Victoria.	Q'land.	S. Aust.	W. Aust.	Tas. (a)	N. Ter.	Fed. Cap. Ter. (a)	Total.
1920	525,981	374,545	449,103	490,944	68,055	27,468	1,330	74	1,537,500
1921	631,699	331,707	499,992	495,323	54,640	33,566	2,445	90	1,649,462
1922	738,908	424,199	504,394	412,294	79,823	31,026	1,587	142	1,907,373
1923	752,376	461,958	566,452	4140,979	90,833	33,729	2,500	113	2,048,940
1924	818,683	499,840	893,169	155,050	95,648	36,154	6,630	143	2,505,317

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

9. **Production and Consumption of Beef.**—The production of beef in Australia during the three years ended 1924-25 was estimated at 1,090,081,223 lbs. per annum. The requirements of the local market absorbed 903,162,333 lbs., or nearly 83 per cent. leaving a balance of slightly more than 17 per cent., which was exported as frozen and canned beef. The annual consumption of beef per head of population in Australia averaged 157 lbs. compared with 70 lbs. in the United States of America, 71 lbs. in Canada, and 64 lbs. in the United Kingdom for the same period.

10. **Export of Beef Preserved by Cold Process.**—The establishment of the frozen meat export trade about the year 1882 provided an outlet for the surplus stock of Australia, and since that date the trade in frozen beef has grown to large proportions, the quantities exported during the five years 1920-21 to 1924-25 being as follows :—

BEEF PRESERVED BY COLD PROCESS.—EXPORTS, AUSTRALIA, 1920-21 TO 1924-25.

Country to which Exported.	1920-21.	1921-22.	1922-23.	1923-24.	1924-25.	Total for 5 years.
QUANTITY.						
	lbs.	lbs.	lbs.	lbs.	lbs.	lbs.
United Kingdom ..	156,316,163	108,671,867	112,316,545	62,286,753	175,276,049	614,867,377
Italy ..	3,096,341	..	67,315	8,511,922	48,938,055	60,613,633
Belgium ..	..	..	2,452,475	7,728,342	25,679,301	35,860,118
Philippine Islands ..	2,479,724	8,093,851	4,780,134	8,442,695	8,117,712	31,014,116
Germany ..	..	..	17,321,705	5,437,988	6,777,898	29,537,591
Egypt ..	10,202,633	1,904,187	5,228,357	3,242,520	6,406,583	26,984,280
Malaya (British) ..	3,305,162	2,392,991	2,215,561	1,908,621	2,012,101	11,834,426
Hawaiian Islands ..	2,437,135	554,698	2,089,605	230,274	996,735	6,308,447
Malta ..	..	..	1,223,563	2,007,894	3,006,897	6,238,354
France ..	..	783,824	1,802,192	625,223	2,909,841	6,121,080
Hong Kong ..	849,904	610,785	511,417	1,444,881	382,390	3,799,377
Gibraltar ..	..	..	353,354	1,254,888	929,137	2,537,379
Japan ..	47,481	213,295	398,301	884,679	981,672	2,525,428
Ceylon ..	530,636	322,010	456,739	319,546	309,781	1,938,712
Other Countries ..	377,300	619,845	1,733,404	837,714	896,535	4,464,798
Total ..	179,642,479	124,167,353	152,950,667	105,163,940	283,620,687	845,545,126

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

Country to which Exported.	1920-21.	1921-22.	1922-23.	1923-24.	1924-25.	Total for 5 years.
VALUE.						
United Kingdom ..	£ 3,302,283	£ 1,616,075	£ 1,285,049	£ 734,814	£ 2,552,775	£ 9,490,996
Italy ..	62,575	..	842	115,819	725,510	904,746
Belgium ..	..	..	27,314	96,270	366,488	490,072
Philippine Islands ..	56,032	133,696	60,843	105,971	103,781	460,323
Egypt ..	207,643	24,431	67,684	45,858	93,805	439,421
Germany ..	..	..	202,119	65,054	105,496	372,669
Malaya (British) ..	71,090	44,687	34,552	28,980	32,496	211,814
Hawaiian Islands ..	77,784	7,280	28,412	3,955	16,386	133,817
Malta ..	..	..	14,265	30,658	46,872	91,795
France ..	..	9,798	21,720	7,101	44,539	83,158
Hong Kong ..	18,553	11,117	6,771	19,537	5,567	61,545
Ceylon ..	13,478	6,111	8,455	6,405	5,868	40,317
Gibraltar ..	..	..	4,214	14,853	15,458	34,525
Japan ..	1,152	3,892	5,340	12,603	10,806	33,793
Other Countries ..	9,242	10,840	27,155	14,001	14,240	75,478
Total ..	3,819,841	1,867,927	1,794,785	1,301,879	4,140,087	12,924,469

The figures for 1924-25 reveal a remarkable revival in the beef export trade. Not only were the quantities exported greatly in excess of the shipments during the past five years, but the clearances effected have only once been exceeded in the history of the trade, viz., in 1914-15, when 292,066,489 lbs. were despatched abroad. The increase can be attributed in part to the better prices paid for export cattle, and to the favourable climatic conditions prevailing over a large section of pastoral country during the years 1924 and 1925. The largest purchaser of Australian beef is the United Kingdom, which during the five years ended 1924-25 took £9,490,996 worth, or more than 73 per cent. of the total shipments. A satisfactory feature of the trade was the increased quantities taken by European countries other than the United Kingdom in 1923-24 and 1924-25, the value of the exports thereto in the latter year amounting to £1,304,363 or nearly 32 per cent. of the total exportation.

11. **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 withdrew 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, while a further renewal in 1925 resulted in a payment of £919 being made for the exportation of live cattle from Australia.

§ 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. The number of sheep in New South Wales generally represents more than half the total for Australia, and this ratio obtains in the returns for the latest year available.

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 millions during the drought of 1922, the number reported early in 1925 amounted to 93,154,953. 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, but the satisfactory prices realized for wool coupled with the favourable seasons resulted in a considerable increase during 1924 and 1925.

The number of sheep in the several States and Territories for each year from 1920 to 1924 was as follows :—

SHEEP.—NUMBER, 1920 TO 1924.

Year.	New South Wales. (b)	Victoria. (a)	Queens-land.	South Australia.	Western Australia.	Tasmania. (a)	Nor. Ter.	Fed. Cap.Ter. (b)	Total.
1920	33,691,838	12,171,084	17,404,840	66,359,944	6,532,965	1,570,832	6,062	159,990	77,897,555
1921	37,025,716	12,325,818	18,402,399	66,257,052	6,506,177	1,551,273	6,349	151,686	82,226,470
1922	34,723,684	11,765,520	17,641,071	66,305,133	6,664,135	1,558,494	6,161	139,063	78,803,261
1923	37,407,013	11,059,761	16,756,101	66,596,875	6,595,867	1,557,716	4,728	132,400	80,110,461
1924	46,934,210	12,649,898	19,028,252	6,359,240	6,396,564	1,614,085	6,914	165,790	93,154,953

(a) 1st March, year following.

(b) 30th June, year following.

In New South Wales during recent years it was found that the numbers of sheep had been to some extent understated by pastoralists in their annual returns, and the statistics for 1924-25 were, therefore, compiled from data independent of owners' statements. Effective comparisons between the figures for this and earlier years will consequently depend on the result of the further inquiries at present being made.

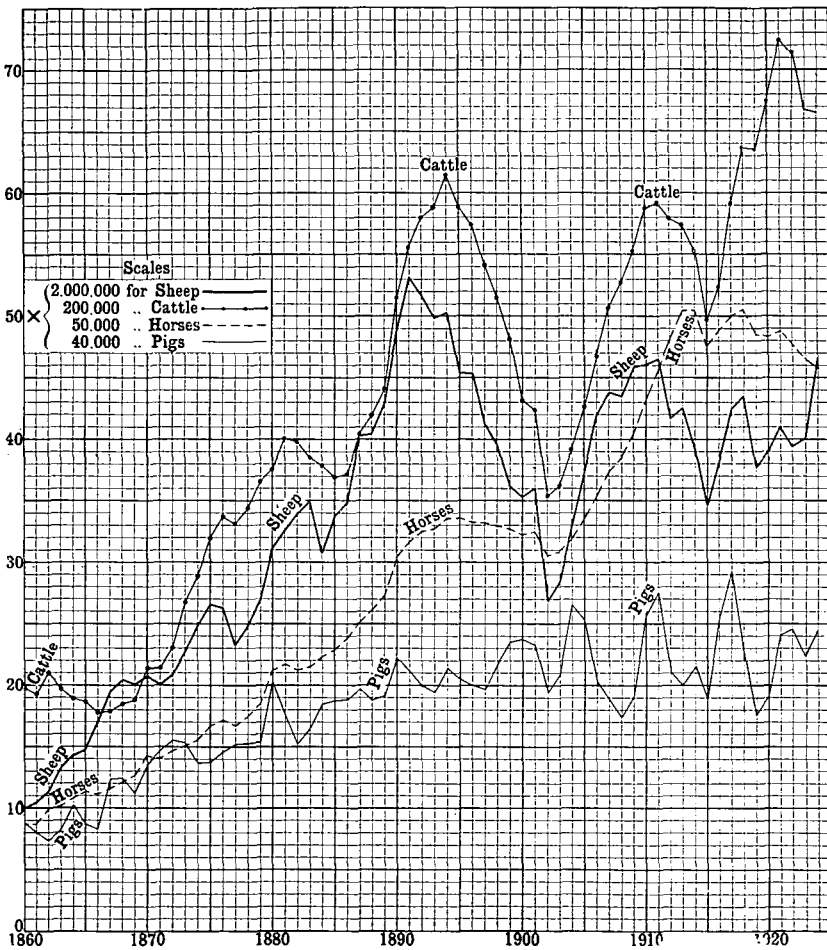
3. **Proportion in the Several States and Territories.**—Particulars concerning the relative positions of the several States and Territories with respect to the total flocks of Australia during the years 1920 to 1924 are given hereunder :—

SHEEP.—PERCENTAGE IN EACH STATE, 1920 TO 1924.

Year.	N.S.W.	Victoria.	Q'land.	S. Aust.	W. Aust.	Tas.	N. Ter.	Fed. Cap. Ter.	Total.
			%		%	%	%	%	
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
1924	50.38	13.58	20.42	6.83	6.87	1.73	0.01	0.18	100.00

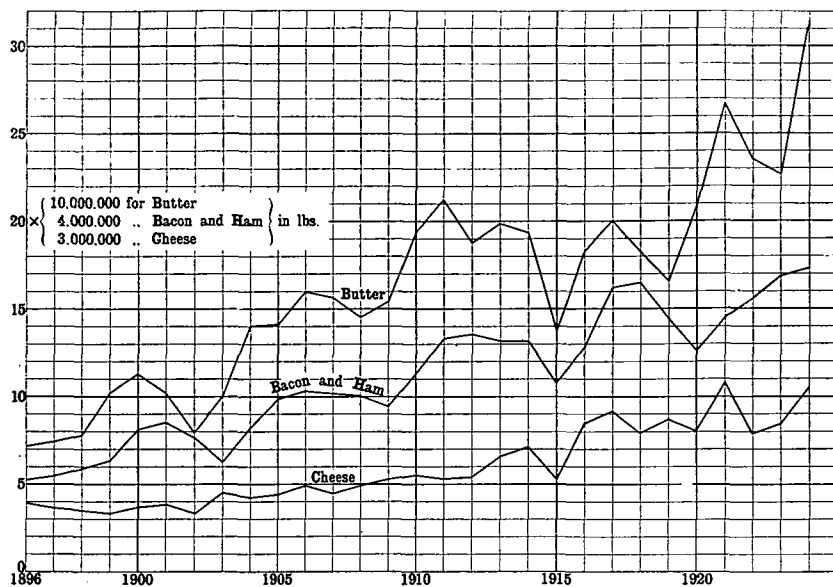
Apart from the effect of drought the percentage of sheep depastured in the different States shows little change. The most noteworthy alteration was a gain of 7.13 per cent. in New South Wales mainly at the expense of Queensland and Victoria. The percentage increase in New South Wales is, however, subject to alteration on account of the defects in the returns alluded to above.

NUMBER OF HORSES, CATTLE, SHEEP, AND PIGS—AUSTRALIA, 1860 TO 1925.



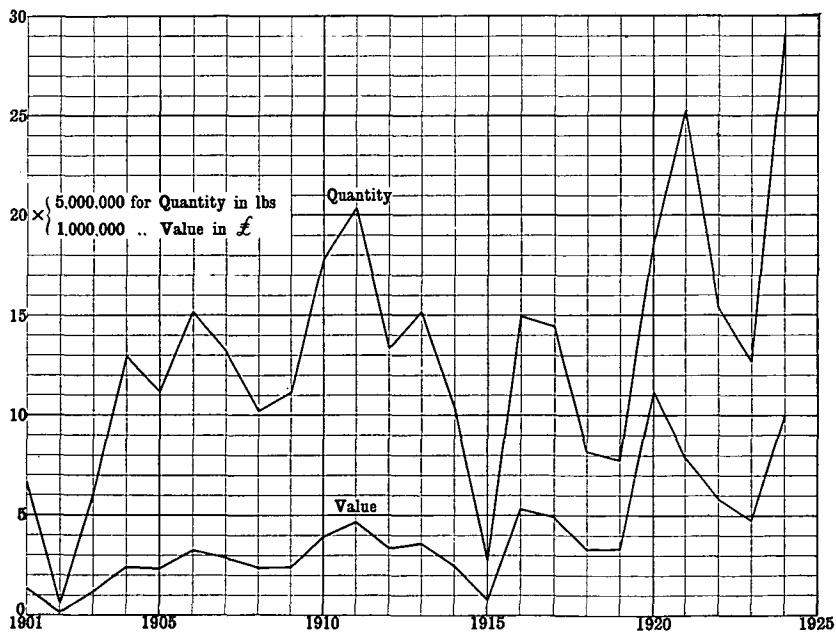
EXPLANATION.—The base of each small square represents an interval of one year, and the vertical side 2,000,000 in the case of sheep, 200,000 for cattle, 50,000 for horses, 40,000 for pigs.

PRODUCTION OF BUTTER AND CHEESE, AND BACON AND HAM—AUSTRALIA,
1896 TO 1924.



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 1924.



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.

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 1920 to 1924 is as follows :—

SHEEP.—NUMBER PER HEAD OF POPULATION, 1920 TO 1924.

Year.	N.S.W.	Victoria.	Q'land.	S. Aust.	W. Aust.	Tas.	N. Ter.	Fed. Cap. Ter.	Total.
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 ..	16.50	6.50	20.66	12.47	18.64	7.11	1.33	35.97	13.88
1924 ..	20.82	7.64	22.79	11.81	17.57	7.34	1.92	55.30	15.66

5. **Comparison with other Countries.**—As regards the size of its flocks, and the quantity and quality of wool produced, Australia has long occupied the leading position amongst the sheep-raising countries of the world. The following comparison taken mainly from the Year Book of the International Institute of Agriculture gives the latest 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 ..	1924	93,155	Soudan (Anglo-Egyptian) ..	1924	8,214
Soviet Republics ..	1924	67,084	Brazil ..	1920	7,933
U.S. of America ..	1925	40,748	Jugo-Slavia ..	1925	7,907
Argentine Republic ..	1922	36,209	French Equatorial and West Africa ..	1924	6,827
India (British and Native) ..	1923	33,537	Greece ..	1921	5,789
Union of South Africa ..	1923	31,224	Germany ..	1925	4,742
New Zealand ..	1925	24,548	Algeria ..	1924	4,605
United Kingdom ..	1925	23,577	Chile ..	1922	4,569
China ..	1916	22,232	Iraq ..	1924	4,433
Spain ..	1924	18,460	Tanganyika Territory(a) ..	1923	3,940
Uruguay ..	1924	14,443	Portugal ..	1920	3,851
Rumania ..	1925	12,950	Irish Free State ..	1925	2,813
Italy ..	1919	11,754	Canada ..	1925	2,756
Peru ..	1922	11,335	Kenya ..	1924	2,568
Turkey ..	1919	11,200	Poland ..	1921	2,193
France ..	1924	10,172	Basutoiland ..	1924	2,002
Bulgaria ..	1920	8,923			
French Morocco ..	1924	8,215			

(a) Including goats.

6. **World's Totals.**—The number of sheep in the various great divisions of the world has been estimated by the International Institute of Agriculture, and a comparison has been made with pre-war estimates. In the table below the results are shown, the totals being subject to the limitations noted for other classes of live stock. (See § 2, 6 ante.)

SHEEP.—WORLD'S TOTALS, 1913 AND 1924.

Continents, etc.	Number at the date nearest—		Increase (+) or Decrease (—) in 1924.	
	1913.	1924.	Actual Figures.	Percentages.
	,000	,000	,000	
Europe ..	162,070	181,462	+19,392	+12.0
North and Central America ..	56,839	40,318	—16,521	—29.1
South America ..	98,578	77,405	—21,173	—21.5
Asia ..	59,702	54,769	— 4,933	— 8.3
Africa ..	73,489	73,509	+ 20	..
Oceania ..	109,330	117,756	+ 8,426	+ 7.7
Total ..	560,008	545,219	—14,789	— 2.6

The net decrease shown has been principally due to the decline in the numbers for America, the United States being mainly responsible for the falling off in North America, while in South America large reductions were recorded in Argentine, Brazil, and Uruguay. On the other hand, substantial increases were returned in the totals for Europe and Oceania.

7. **Oversea Imports and Exports of Sheep.**—As in the case of cattle, the overseas 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 has 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 1920-21 to 1924-25 :—

SHEEP.—IMPORTS AND EXPORTS, AUSTRALIA, 1920-21 TO 1924-25.

Year.	Imports.		Exports.		Net Exports.	
	No.	Value.	No.	Value.	No.	Value.
		£		£		£
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
1924-25 ..	2,183	10,902	6,326	40,695	4,143	29,793

8. **Sheep Slaughtered.**—The number of sheep slaughtered in the several States during each of the years from 1920 to 1924 was as follows :—

SHEEP (INCLUDING LAMBS) SLAUGHTERED, 1920 TO 1924.

Year.	N.S.W. (a)	Victoria.	Q'land.	S. Aust.	W. Aust.	Tas. (a)	Nor. Ter.	Fed. Cap. Ter.(a)	Total.
1920 ..	3,847,498	4,244,798	461,449	1,058,977	839,963	387,346	100	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	1,056,140	809,379	316,438	..	2,698	10,395,712
1924 ..	3,396,957	3,591,219	446,247	933,426	588,577	276,117	..	2,989	9,235,532

(a) Year ended 30th June year following.

9. **Production and Consumption of Mutton and Lamb.**—The annual production of mutton and lamb during the three years ended 1924-25 averaged 459,431,744 lbs., of which 371,407,536 lbs., or 80.8 per cent., was consumed locally, leaving a balance of 19.2 per cent. for exportation. The consumption of mutton and lamb in Australia during the same period averaged 65 lbs. per head per annum, a figure considerably in excess of the per capita consumption during the past three years in the following countries :—United Kingdom, 27 lbs.; Canada, 9 lbs.; and United States of America, 5 lbs.

10. **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 away considerably during the war years, but a record shipment of 246,971,346 lbs., valued at £5,482,564, was made in 1919-20, and another large consignment was dispatched in 1922-23. Climatic conditions favoured a considerable output in the next two seasons, but shipments were small, owing chiefly to remarkably high values ruling for wool.

As in the case of frozen beef, the principal customer in this trade is the United Kingdom, which absorbed more than 94 per cent. of the total quantity exported from Australia during the last five years, while the balance was shipped mainly to Malaya (British), Egypt, Hong Kong, Ceylon, and Sweden.

MUTTON AND LAMB PRESERVED BY COLD PROCESS.—EXPORTS, AUSTRALIA, 1920-21 TO 1924-25.

Country to which Exported.	1920-21.	1921-22.	1922-23.	1923-24.	1924-25.	Total for 5 years.
QUANTITY.						
	lbs.	lbs.	lbs.	lbs.	lbs.	lbs.
United Kingdom ..	47,792,058	88,631,613	162,653,301	35,996,594	46,025,699	381,099,265
Malaya (British) ..	1,228,087	1,089,985	1,106,778	846,641	1,072,104	5,343,595
Egypt ..	2,744,246	178,380	984,473	463,332	739,176	5,109,607
Hong Kong ..	410,329	391,166	432,250	491,660	446,076	2,171,481
Ceylon ..	398,214	396,880	340,484	415,729	443,937	1,995,244
Sweden ..	1,217,551					1,217,551
Philippine Islands ..	237,264	289,294	208,910	184,482	167,118	1,087,068
Canada ..	37,427	329,030	203,315	251,046	216,121	1,036,939
Union of South Africa ..	193,709	72,920	179,226	156,102		601,957
United States ..	124,535					124,535
Other Countries ..	510,401	335,731	1,503,824	999,763	1,161,231	4,510,950
Total ..	54,233,821	91,714,999	167,612,561	39,805,349	50,271,462	404,298,192

VALUE.						
	£	£	£	£	£	£
United Kingdom ..	1,393,179	2,073,276	4,205,189	1,067,571	1,397,291	10,136,506
Malaya (British) ..	36,980	24,750	28,581	25,067	34,548	149,876
Egypt ..	64,409	3,514	18,825	11,021	20,781	118,550
Hong Kong ..	12,352	8,690	12,104	14,969	14,144	62,259
Ceylon ..	11,784	7,781	8,872	12,296	14,018	54,751
Sweden ..	29,805					29,805
Philippine Islands ..	6,595	6,347	5,740	5,486	5,556	29,724
Canada ..	955	7,422	3,944	6,216	6,503	25,040
Union of South Africa ..	4,535	1,029	3,710	4,167		13,441
United States ..	4,684					4,684
Other Countries ..	13,380	6,806	35,002	24,057	29,241	108,486
Total ..	1,578,658	2,139,615	4,321,917	1,170,850	1,522,082	10,733,122

§ 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, 1925, being about £72,020,000. The bulk of the production is exported, but with the greater activity of Australian woollen mills the quantity used locally is increasing, nevertheless the amount so used represents approximately 7 per cent. only of the total 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 1920-21 will be found in earlier issues of the Year Book. The following table gives the estimates obtained for the five seasons ended 30th June, 1921 to 1925 :—

WOOL.—TOTAL PRODUCTION, 1920-21 TO 1924-25.

State.	1920-21.	1921-22.	1922-23.	1923-24.	1924-25.
	lbs.	lbs.	lbs.	lbs.	lbs.
New South Wales(a) ..	240,231,000	285,418,000	293,571,000	271,008,000	369,118,000
Victoria ..	90,250,571	103,512,777	102,467,950	82,513,361	106,787,897
Queensland ..	114,809,963	132,579,733	134,971,150	121,913,075	140,862,541
South Australia ..	48,953,503	54,038,262	54,929,801	57,598,083	58,663,608
Western Australia ..	43,714,630	46,301,039	44,139,138	48,055,393	43,307,052
Tasmania ..	9,503,048	9,634,624	10,218,550	9,712,273	10,483,452
Northern Territory(b)	40,000	30,000	29,000	20,000	20,000
Total ..	547,502,715	631,514,435	640,317,589	590,820,185	729,242,550

(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. Understatement by pastoralists has been the main cause of the shortage. Special inquiries prosecuted in the various States have located the nature and extent of the discrepancy, and the figures for 1924-25 are believed to be an accurate statement of the production for that year. Until further inquiries have been completed, it will not be possible to adjust the figures for earlier years, but it is estimated that the addition of 11½ per cent. to the tables already published will give a very close approximation to the correct results.

(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, 1920-21 TO 1924-25.

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.
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	5.58	6.86
1925	8.26	7.21	7.41	8.26	5.84	5.73	7.69
VALUE.							
	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.
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
1925	17 1	16 1	15 4	15 10	11 9	16 1	16 0

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 2,906,579,000 lbs. in 1925, Australia's contribution amounted to 729,243,000 lbs., or more than 25 per cent. of the world's supply.

WOOL(a).—WORLD'S PRODUCTION, 1909 TO 1925.

Countries.	Average Annual Pre-War Production (b)	Production	
		1924.	1925.(c)
North America—	lbs.	lbs.	lbs.
United States	314,110,000	286,205,000	301,060,000
Canada	11,210,000	15,112,000	15,924,000
Mexico	7,000,000	2,850,000	2,850,000
Total	332,320,000	304,167,000	319,834,000
Central America and West Indies	1,000,000	750,000	750,000
South America—			
Argentine Republic	358,688,000	280,000,000	275,000,000
Brazil	35,000,000	19,000,000	19,467,000
Chile	17,430,000	32,500,000	33,000,000
Peru	9,940,000	7,742,000	8,816,000
Falkland Islands	4,324,000	4,500,000	4,500,000
Uruguay	156,968,000	96,500,000	110,000,000
All other	5,000,000	5,000,000	5,000,000
Total	587,350,000	445,242,000	455,783,000
Europe—			
Austria	15,360,000	2,043,000	1,900,000
Belgium	1,060,000	850,000	840,000
Bulgaria	23,700,000	24,250,000	25,450,000
Czecho-Slovakia .. ..	..	3,970,000	4,210,000
Denmark	3,508,000	1,576,000	1,213,000
Estonia .. ..	..	1,782,000	1,782,000
Finland .. ..	..	5,000,000	5,000,000
France	80,688,000	43,413,000	44,312,000
Germany	52,000,000	53,000,000	53,000,000
Greece	14,000,000	19,810,000	18,000,000
Hungary	17,637,000	13,200,000	14,960,000
Iceland	1,980,000	2,205,000	1,530,000
Italy	55,000,000	57,000,000	57,000,000
Jugo-Slavia	25,446,000	27,662,000	28,000,000
Netherlands	3,556,000	5,842,000	5,842,000
Norway	8,160,000	5,512,000	5,600,000
Poland	7,100,000	4,480,000	4,500,000
Portugal	10,000,000	6,000,000	6,000,000
Rumania	13,228,000	52,910,000	54,940,000
Russia	320,000,000	(d)195,000,000	(d)195,000,000
Spain	72,000,000	81,400,000	81,400,000
Sweden	2,875,000	2,172,000	2,200,000
Switzerland	1,049,000	750,000	660,000
Turkey	28,000,000	..	..
United Kingdom	134,000,000	92,300,000	96,086,000
Irish Free State .. ..	..	14,000,000	13,668,000
All other .. ..	..	7,276,000	7,276,000
Total	890,347,000	723,403,000	730,369,000

(a) Computed on "greasy" basis. (b) Average for years 1909 to 1913 inclusive. (c) Where 1925 figures were not obtainable, an earlier figure or an unofficial estimate has been inserted. (d) Including Asiatic Russia.

WOOL(a).—WORLD'S PRODUCTION, 1909 TO 1925—*continued.*

Countries.	Average Annual Pre-War Production.(b)	Production.	
		1924	1925.(c)
	lbs.	lbs.	lbs.
Asia—			
British India	60,000,000	60,000,000	60,000,000
China	50,000,000	75,000,000	75,000,000
Persia	12,146,000	19,000,000	13,000,000
Russia in Asia	60,000,000	(e)	(e)
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	215,000,000	209,000,000
Africa—			
Algeria	35,221,000	33,000,000	35,200,000
British South Africa	165,888,000	183,000,000	185,000,000
Tunis	3,735,000	4,400,000	4,400,000
Morocco	14,850,000	22,000,000	22,000,000
All other	30,000,000	30,000,000	30,000,000
Total	249,694,000	272,400,000	276,600,000
Oceania—			
Australia	700,193,000	590,820,000	729,243,000
New Zealand	198,474,000	188,000,000	170,000,000
Total	898,667,000	778,820,000	899,243,000
Total all other Countries	13,000,000	15,000,000	15,000,000
GRAND TOTAL	3,245,524,000	2,754,782,000	2,906,579,000

(a) Computed on "greasy" basis. (b) Average for years 1909 to 1913 inclusive. (c) Where 1925 figures were not obtainable, an earlier figure or an unofficial estimate has been inserted. (e) Included with European Russia.

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,
1920-21 TO 1924-25.

State.	1920-21.	1921-22.	1922-23.	1923-24.	1924-25.
	lbs.	lbs.	lbs.	lbs.	lbs.
New South Wales	7,208,896	6,648,224	4,882,740	4,895,206	4,345,956
Victoria	12,799,593	13,293,011	15,926,225	13,068,648	14,420,497
Queensland	556,232	1,822,494	1,358,888	1,317,521	1,102,110
South Australia	683,779	608,098	621,265	580,800	536,870
Western Australia					
Tasmania	1,129,722	1,043,706	1,502,060	963,369	1,931,814
Total	22,376,222	23,415,533	24,291,178	20,831,544	22,337,247

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 dispatched to the United Kingdom, whereas the shipments for the same destination during the past five years have averaged more than 47 per cent. The other leading consignees during the latter period were France, Japan, Belgium, United States of America, Germany, and Italy, the principal continental countries taking 37 per cent., and America and Japan 15 per cent. of the total shipments. The following table shows for the years 1920–21 to 1924–25 the quantities of “greasy” wool exported, and the principal countries of destination:—

WOOL IN THE GREASE.—EXPORTS, AUSTRALIA, 1920–21 TO 1924–25.

Country to which Exported.	1920–21.	1921–22.	1922–23.	1923–24.	1924–25.	Total for 5 years.
	lbs.	lbs.	lbs.	lbs.	lbs.	lbs.
United Kingdom ..	283,583,260	337,775,993	259,230,707	163,169,820	175,937,327	1,219,697,107
France ..	32,484,058	136,751,611	137,742,458	121,268,001	114,676,170	542,922,298
Japan ..	9,856,174	50,775,592	50,043,561	45,455,153	53,015,265	209,145,745
United States of America ..	34,291,220	45,778,371	50,234,655	31,909,668	38,501,358	200,715,272
Belgium ..	26,021,710	55,690,271	34,180,045	48,011,894	36,682,734	200,586,654
Germany ..	8,715,299	39,830,067	32,940,661	31,422,309	39,595,031	152,503,367
Italy ..	15,975,186	39,629,626	28,646,259	25,143,698	28,752,441	138,147,210
Netherlands ..	884,634	636,378	3,017,462	14,091,947	2,977,389	21,607,810
Canada ..	362,915	1,619,372	1,184,321	697,794	483,127	4,347,529
India ..	381,516	613,701	296,164	1,598,944	770,543	3,660,868
Other Countries ..	5,344,064	1,619,731	807,697	1,196,811	875,712	9,844,015
Total ..	417,909,036	710,720,713	598,323,990	483,966,039	492,267,097	2,703,177,875

(ii) Scoured and Washed—Quantities. Similar particulars concerning the exports of “scoured and washed” wool were as follows:—

WOOL, SCOURED AND WASHED(a).—EXPORTS, AUSTRALIA, 1920–21 TO 1924–25.

Country to which Exported.	1920–21.	1921–22.	1922–23.	1923–24.	1924–25.	Total for 5 years.
	lbs.	lbs.	lbs.	lbs.	lbs.	lbs.
United Kingdom ..	43,100,738	65,815,973	75,505,841	24,664,470	27,181,826	236,268,848
France ..	1,544,101	13,271,181	13,533,782	8,451,562	5,609,547	42,410,173
Belgium ..	10,648,048	16,153,469	3,933,725	3,749,960	3,179,143	37,669,345
Japan ..	3,719,499	5,051,529	6,435,286	5,010,121	3,462,119	23,678,554
United States of America ..	6,490,418	1,880,728	4,588,736	449,143	713,661	14,122,686
Germany ..	279,822	3,269,868	6,006,516	2,469,208	1,979,909	13,945,323
Italy ..	568,690	1,500,550	1,005,988	490,020	413,873	3,979,126
Canada ..	438,254	1,133,766	823,238	582,580	441,424	3,419,262
Netherlands ..	9,845	..	577,066	957,687	18,995	1,563,593
India ..	130,260	48,831	13,513	233,934	212,006	638,544
Other Countries ..	1,194,703	493,456	345,876	297,967	448,554	2,780,566
Total ..	68,124,378	108,559,351	112,774,567	47,356,652	43,661,062	380,476,010

(a) Including “tops.”

The figures for “scoured and washed wool” include tops, amounting in 1920–21 to 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, in 1923–24, 4,988,258 lbs., valued at £1,161,920, and in 1924–25, 4,090,958 lbs., valued at £1,119,849. The total exports of wool tops during the last five years amounted to 28,253,324 lbs., valued at £6,951,088, of which 20,364,163 lbs., or more than 72 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, 1920-21 TO 1924-25.

Country to which Exported.	1920-21.	1921-22.	1922-23.	1923-24.	1924-25.	Total for 5 years.
	£	£	£	£	£	£
United Kingdom ..	21,889,438	23,013,128	25,901,608	20,136,750	24,386,464	115,327,388
France ..	1,357,358	6,842,265	10,408,195	12,278,938	12,484,097	43,370,853
Japan ..	2,107,473	4,438,672	6,095,616	6,212,881	7,479,586	26,334,228
United States of America	3,836,987	4,347,360	5,618,652	4,323,239	5,926,430	24,052,668
Belgium ..	2,380,519	3,784,065	2,514,717	4,951,127	3,844,335	17,474,763
Germany ..	364,196	2,404,833	3,448,031	3,576,436	4,929,589	14,723,085
Italy ..	1,164,280	2,667,081	2,498,733	2,634,990	3,327,166	12,292,250
Netherlands ..	46,348	44,388	347,698	1,625,493	367,651	2,431,578
Canada ..	79,588	245,421	184,365	154,323	162,395	826,092
India ..	45,198	50,243	11,487	123,550	108,522	339,000
Other Countries ..	509,375	139,787	109,602	179,431	246,910	1,185,165
Total ..	33,780,760	47,977,243	57,138,764	56,197,158	63,263,145	258,357,070

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., 1920-21 TO 1924-25.

Year	1920-21.	1921-22.	1922-23.	1923-24.	1924-25.
	d.	d.	d.	d.	d.
Average value per lb. ..	14.53	13.16	18.38	24.14	27.10

9. *Exports and Local Sales of Wool, States, 1924-25.*—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, 1925, 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, the figures consequently do not show actual local production, but total overseas shipments and sales.

WOOL.—EXPORTS AND LOCAL SALES, SEASON 1924-25.

State.	Overseas Exports.		Local Sales.(a)	
	Bales.	%	Bales.	%
New South Wales ..	715,303	42.19	653,200	41.14
Victoria ..	384,019	22.65	(b)382,743	24.11
Queensland ..	307,202	18.12	267,641	16.86
South Australia ..	154,906	9.14	165,693	10.43
Western Australia ..	104,847	6.18	84,903	5.35
Tasmania ..	29,084	1.72	33,570	2.11
Total ..	1,695,361	100.00	1,587,750	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 1925.—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 1925.

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
1925	..	..	..	1,695,361	1,587,750	93.65

(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, and a similar condition of affairs in 1925 can be traced to the collapse of the wool market during the latter part of the season and the consequent withdrawal of 500,000 bales of wool from sale. The ratio of sales to shipments is, of course, 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, 1924-25.

Description of Wool.	N.S.W.	Victoria. (a)	Q'land.	S. Aust.	W. Aust.	Tasmania.	Total.
	Bales.	Bales.	Bales.	Bales.	Bales.	Bales.	Bales.
Greasy ..	621,698	380,731	241,270	164,396	83,845	33,550	1,525,490
Scoured ..	31,502	2,012	26,371	1,297	1,058	20	62,260
Total ..	653,200	382,743	267,641	165,693	84,903	33,570	1,587,750
Fleeces, etc. ..	618,646	356,460	257,184	154,050	77,917	32,309	1,496,566
Lambs ..	34,554	26,283	10,457	11,643	6,986	1,261	91,184
Total ..	653,200	382,743	267,641	165,693	84,903	33,570	1,587,750
Merino ..	561,033	218,753	266,005	159,941	81,412	6,983	1,294,132
Crossbred and all strong breeds ..	92,167	163,990	1,636	5,752	3,491	26,582	293,618
Total ..	653,200	382,743	267,641	165,693	84,903	33,570	1,587,750

(a) Including wool sold at Albury.

WOOL.—LOCAL SALES, DESCRIPTIONS, 1924-25—*continued.*

Description of Wool.	N.S.W.	Victoria. (a)	Q'land.	S. Aust.	W. Aust.	Tasmania.	Total.
	%	%	%	%	%	%	%
Greasy ..	95.18	99.47	90.14	99.22	98.75	99.94	96.07
Scoured ..	4.82	0.53	9.86	0.78	1.25	0.06	3.93
Total ..	100.00	100.00	100.00	100.00	100.00	100.00	100.00
Fleece, etc. ..	94.71	93.13	96.09	92.97	91.77	96.24	94.26
Lambs' ..	5.29	6.87	3.91	7.03	8.23	3.76	5.74
Total ..	100.00	100.00	100.00	100.00	100.00	100.00	100.00
Merino ..	85.89	57.15	99.39	96.53	95.89	20.82	81.51
Crossbred and all strong breeds ..	14.11	42.85	0.61	3.47	4.11	79.18	18.49
Total ..	100.00	100.00	100.00	100.00	100.00	100.00	100.00

(a) Including wool sold at Albury.

A very large proportion of the wool clip 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 1924-25 season amounted to over 96 per cent. Of fleece and lambs' wool, the former represented 94.26, and the latter 5.74 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 81.51 in 1924-25, while crossbred declined from 33.89 to 18.49 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 prevailing 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 1924-25:—

WOOL.—LOCAL SALES, PERCENTAGES OF DESCRIPTIONS, 1924-25.

Description of Wool.	N.S.W.	Victoria.	Q'land.	S. Aust.	W. Aust.	Tasmania.	Total.
	%	%	%	%	%	%	%
Greasy ..	40.75	24.96	15.81	10.78	5.50	2.20	100.00
Scoured ..	50.60	3.23	42.36	2.08	1.70	0.03	100.00
Fleece, etc. ..	41.34	23.82	17.18	10.29	5.21	2.16	100.00
Lambs' ..	37.89	28.83	11.47	12.77	7.66	1.38	100.00
Merino ..	43.35	16.90	20.56	12.36	6.29	0.54	100.00
Crossbred and all strong breeds ..	31.39	55.85	0.56	1.96	1.19	9.05	100.00

The bulk of the crossbred wool in 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 four 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 tend towards the abandonment of coarse wool-growing in Australia.

13. The Wool Market.—(i) *The 1924-25 Season.* The 1924-25 wool-selling season was distinguished by a remarkable advance in values, followed by an equally remarkable decline. The price level established during the previous season was a record one, but when the new season opened it was thought that the increase in the volume of production would compel some concession in values, and misgivings were expressed regarding the effective financing of the clip. With the advance of the season, however, prices began to soar until they eclipsed all previous records. Confidence prevailed, and the sales were exceptionally keen. After the Christmas recess, however, prices began to recede, confidence was undermined, and a position was reached when the demand was insufficient to maintain normal sales. The selling programme was promptly revised and remodelled and the sales continued, but the position became so unsatisfactory that they had to be suspended, and arrangements were made for the carry over of a quarter of the clip to the following season. Experts find it difficult to account for the remarkable fall in values, but the view is generally held that the high prices of the raw material, coupled with the inflated cost of clothing, adversely affected the demand.

The 1924-25 clip was well grown, of good length and body, with softness of handle. Owing to the abundant season, the fibre was not so fine in quality as usual, but the yield per sheep was heavy, and altogether the clip was one of the best on record.

During the year, the wool sold in Australia totalled 1,587,750 bales, and though this quantity represented a decrease of 110,391 bales on the previous season's record sales, there was an increase in the amount realized of no less than £2,240,464, the returns aggregating a value of £55,545,838 as compared with £53,305,374 in the previous year. The average price per bale was £34 19s. 8d., which, considering that it included every description of wool, is a remarkable figure, and constitutes an absolute record for the Australian sales.

The prices realized in the past season were in every instance except two, viz., merino locks and scoured crossbred fleece, the highest recorded in the Australian market. In the case of greasy merino fleece the season's record of 53½d. was 6½d. above the record of the previous season, and 3½d. above the previous Australian record obtained in 1920-21 when 49½d. was reached for a consignment of Ware wool. The past season record of 53½d. was secured for a parcel of the well-known Plains wool disposed of in the Geelong market, a centre which invariably secures the premier position at Australian wool sales. The Geelong market again excelled in highest prices, securing no less than nine records, while Brisbane obtained three, Melbourne two, and Sydney 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,
1916-17 TO 1924-25.**

Description.	Price.	Brand.	Bales.	Selling Centre.	Season.
	<i>d.</i>				
Greasy Merino :					
Fleece ..	53½	Plains ..	4	Geelong ..	1924-25
Broken ..	45½	R/Carngham ..	34	Geelong ..	1924-25
Pieces ..	43½	Ware (conj.) ..	11	Geelong ..	1924-25
Bellies ..	40½	Langi/Kal Kal ..	12	Geelong ..	1924-25
Locks ..	22½	T/Binda ..	1	Sydney ..	1923-24
		Wattle Grove/M ..	6	Geelong ..	1923-24
		V (reversed) over W/Pen- lan Downs (in ½ circle)	5	Brisbane ..	1923-24
Lambs' ..	48½	Ware (conj.) ..	1	Geelong ..	1924-25
Greasy comeback :					
Fleece ..	50½	WTA/Boorook ..	8	Geelong ..	1924-25
Lambs ..	41½	North Station ..	8	Geelong ..	1924-25
Greasy crossbred :					
Fleece ..	43½	Mondilibi ..	4	Geelong ..	1924-25
		GR ..	25	Geelong ..	1924-25
		Barton ..	6	Tasmania ..	1924-25
Lambs ..	37	JM/Tabletop ..	3	Melbourne ..	1924-25
Scoured merino :					
Fleece ..	70½	AS in centre of double triangle, B/Tarbrax	63	Brisbane ..	1924-25
Pieces ..	63	Inisfail Downs/BB ..	18	Brisbane ..	1924-25
Lambs ..	59½	Garomna ..	4	Brisbane ..	1924-25
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, sold at Garraway's Coffee House, Cornhill, London. 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 wool 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.

14. **United Kingdom Importation of Wool.**—The appended statement of the quantity and value of wool imported into the United Kingdom during the year 1924 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, 1924.

Country from which imported.	Quantity.	Value.	Country from which imported.	Quantity.	Value.
	lbs.	£		lbs.	£
Australia ..	252,171,300	26,516,832	Irish Free State	14,878,900	905,101
New Zealand ..	210,051,100	15,473,147	Belgium ..	6,950,700	613,830
Union of South Africa ..	133,373,000	9,816,285	Peru ..	5,426,300	345,677
Argentine Republic ..	56,248,900	4,309,541	Falkland Islands	3,327,000	296,325
India ..	61,179,600	3,151,698	Other British Possessions ..	5,911,100	362,298
Chile ..	29,668,000	2,594,688	Other Countries	17,725,300	1,032,316
France ..	26,794,500	2,409,967			
United States of America ..	18,135,900	1,699,927			
Uruguay ..	14,051,500	1,395,016			
			Total ..	855,893,100	70,922,647

(a) Greasy, Scoured, and Tops.

Of the importations of wool into the United Kingdom, Australian wool represented 29 per cent. of quantity and 37 per cent. of value, and New Zealand 25 per cent. of quantity and 22 per cent. of value. It is interesting to note that 680,892,000 lbs., valued at £56,521,686, were received from British Possessions, being 80 per cent. of both the total weight and value imported.

§ 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 1920–21 to 1924–25 amounting to £16,627,076, or an average of £3,325,415 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 £12,383,679. The largest purchaser of sheepskins with wool is the United Kingdom, to which nearly 48 per cent. of the consignments was dispatched during the last five years. France ranked next in order of importance with 38 per cent., while the remaining 14 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 1920–21 to 1924–25 were as follows :—

SHEEPSKINS WITH WOOL.—EXPORTS, AUSTRALIA, 1920–21 TO 1924–25.

Particulars.	1920–21.	1921–22.	1922–23.	1923–24.	1924–25.	Total for 5 years.
Sheepskins (with wool) .. No.	4,478,853	7,270,660	9,610,335	7,063,988	6,245,268	34,669,104
Value £	1,155,643	1,346,582	2,948,489	3,111,128	3,821,837	12,383,679

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 88 per cent. of the exports during the past five years, the purchases of the United States of America alone amounting to 51 per cent. of the total shipments. Particulars concerning exports are as follows :—

SHEEPSKINS WITHOUT WOOL.—EXPORTS, AUSTRALIA, 1920-21 TO 1924-25.

Particulars.	1920-21.	1921-22.	1922-23.	1923-24.	1924-25.	Total for 5 years.
Sheepskins (with- out wool) .. No.	704,296	116,553	1,150,739	599,866	64,425	2,635,879
Value £	86,663	6,880	78,630	50,655	7,139	229,967

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 four years. The trade was mainly with the United Kingdom, Italy, and Germany, which countries took respectively 37, 18, and 14 per cent. of the total quantity exported during the past five years. United States of America and Belgium with shipments amounting to 444,467 and 188,483 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, 1920-21 TO 1924-25.

Particulars.	1920-21.	1921-22.	1922-23.	1923-24.	1924-25.	Total for 5 years.
Cattle Hides .. No.	261,938	446,199	651,888	924,092	1,167,938	3,452,055
Value £	375,412	530,355	773,691	817,719	1,322,088	3,819,265

The calfskins exported during the years 1920-21 to 1924-25 numbered 628,218, valued at £190,610, shipped mainly to the United States of America, the value of the skins taken by that country averaging 79 per cent. of the total exports during the past five years. The annual export of horse hides is very small, and averaged only 1,046 hides, valued at £711.

(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 475,428. New Zealand supplies the great bulk of these importations, and shipments of limited quantities are also obtained from the Pacific Islands, France, and Italy. The number and value of cattle hides, including calfskins, imported into Australia during the five years 1920-21 to 1924-25 are as follows :—

CATTLE HIDES.—IMPORTS, AUSTRALIA, 1920-21 TO 1924-25.

Particulars.	1920-21.	1921-22.	1922-23.	1923-24.	1924-25.	Total for 5 years.
Cattle Hides .. No.	313,442	451,373	675,471	480,265	456,589	2,377,140
Value £	500,460	433,014	541,079	533,539	494,501	2,502,593

The number of horse hides imported into Australia is unimportant. Imports during the last five years numbered 22,625, valued at £23,458.