

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 on 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 1920, and from 1923 onwards in single years, are given in the following table, and are shown continuously in the graphs hereinafter.

During the sixty-seven years covered by the table the live stock of Australia increased considerably, horses 392 per cent., cattle 202 per cent., sheep 418 per cent., and pigs 182 per cent. The average annual increases which these aggregates represent are as follows :—Horses, 2.35 per cent. ; cattle, 1.62 per cent. ; sheep, 2.43 per cent. ; and pigs, 1.38 per cent.

LIVE STOCK.—AUSTRALIA, 1860 TO 1927.

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	1,068,774	7,527,142	62,184,252	815,776
1890	1,521,598	10,299,816	97,881,221	891,138
1900	1,609,654	8,640,225	70,602,995	950,349
1910	2,165,866	11,744,714	98,066,046	1,025,850
1920	2,415,510	13,499,737	81,795,727	764,406
1923	2,327,440	13,357,508	84,011,048	897,874
1924	2,292,050	13,309,473	93,154,953	980,009
1925	2,250,361	13,279,785	103,563,218	1,128,374
1926	2,122,516	11,963,278	104,267,101	989,009
1927	2,040,691	11,617,056	100,827,476	878,207

(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 1868, 1877, 1883-4, 1892, 1893, 1895, and subsequent years, 1901-2, 1912, 1914-15, 1918, 1919, 1922-23, 1925-26, and again in 1927-28, in which latter years Central and Northern Queensland experienced one of the driest periods on record, and a heavy mortality of stock.

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

LIVE STOCK PER HEAD OF POPULATION.—AUSTRALIA, 1860 TO 1927.

Year.	Horses.	Cattle.	Sheep.	Pigs.	Year.	Horses.	Cattle.	Sheep.	Pigs.
1860 ..	0.38	3.45	17.58	0.31	1920 ..	0.44	2.49	15.11	0.14
1870 ..	0.43	2.60	25.24	0.33	1923 ..	0.40	2.31	14.61	0.16
1880 ..	0.48	3.37	27.87	0.37	1924 ..	0.39	2.27	15.86	0.17
1890 ..	0.48	3.17	31.06	0.28	1925 ..	0.38	2.22	17.28	0.19
1900 ..	0.43	2.29	18.75	0.25	1926 ..	0.35	1.96	17.06	0.16
1910 ..	0.49	2.65	22.16	0.23	1927 ..	0.33	1.86	16.14	0.14

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, 1927.

States and Territories.	Horses.	Cattle.	Sheep.	Pigs.
New South Wales (a)	1.93	9.21	163.23	0.98
Victoria	4.88	15.10	177.02	2.42
Queensland	0.82	7.79	24.82	0.29
South Australia	0.59	0.83	19.84	0.18
Western Australia	0.17	0.87	8.66	0.06
Tasmania	1.37	8.04	72.66	1.59
Northern Territory	0.08	1.60	0.02	0.00
Federal Capital Territory (a)	1.29	6.58	227.30	0.07
Total	0.68	3.91	33.90	0.30

(a) 30th June, 1928.

7. Minor Classes of Live Stock.—The numbers of minor classes of live stock returned for 1927 were as follows :—Goats, 172,008 ; camels, 10,456 ; mules and donkeys, 17,330 ; and ostriches, 323. 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 11,000 angora goats are included in the total of 172,008 goats shown above. Of these, 2,250 were in New South Wales, 693 in Tasmania, 1,539 in Western Australia, 1,594 in South Australia, and 2,354 in Queensland, while the quantity of mohair produced in the latter State in 1927 was set down at 1,765 lbs., and the number of skins placed on the market was returned as 239.

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 1923–24 to 1927–28 are as follows :—

NET EXPORTS OF PASTORAL PRODUCTS.—AUSTRALIA, 1923-24 TO 1927-28.

Products .	Unit of Quantity.	1923-24.	1924-25.	1925-26.	1926-27.	1927-28.
QUANTITIES.						
Animals (living)—						
Cattle	No.	- 71	9,674	9,898	10,093	11,131
Horses	"	1,478	4,604	5,255	5,276	5,627
Sheep	"	30,302	4,143	20,331	26,218	30,871
Bones	cwt.	26,158	23,748	27,329	18,394	14,486.
Glue-pieces and Sinews	"	- 1,993	- 11,055	- 8,757	- 12,840	- 13,469
Glycerine	lb.	- 230,485	- 489,113	- 603,485	- 553,950	- 571,266.
Hair	(a)	(a)	(a)	(a)	(a)	(a)
Hoofs	cwt.	10,380	8,340	20,510	8,371	13,543.
Horns	(a)	(a)	(a)	(a)	(a)	(a)
Meats—						
Frozen Beef	lb.	105,145,255	283,584,278	214,058,586	112,124,913	169,094,472.
Frozen Mutton and Lamb	"	39,768,347	50,224,659	65,079,850	93,514,533	46,359,146.
Frozen Rabbits and Hares	pair	3,489,496	3,415,334	4,043,511	3,298,372	3,433,098.
Frozen, Other	lb.	6,687,005	9,141,545	8,935,456	3,893,937	7,592,372.
Potted, and Extract of	"	(a)	(a)	(a)	(a)	(a)
Preserved in Tins, etc.	lb.	4,268,814	8,687,019	10,209,971	8,674,251	3,760,147.
Other (excluding Bacon and Ham)	"	234,058	314,867	211,403	166,537	322,117.
Sausage Casings	cwt.	13,213	26,660	24,119	24,222	22,714.
Skins—						
Hides	No.	665,466	900,274	699,080	720,065	1,034,317.
Sheep	"	6,891,162	6,016,231	8,007,249	8,487,652	11,315,072.
Rabbit and Hare	cwt.	77,862	116,522	134,024	126,745	112,547.
Other (including Undressed Furs)	"	(a)	(a)	(a)	(a)	(a)
Tallow	cwt.	394,313	855,596	824,974	833,336	648,592.
Wool—						
Greasy	lb.	478,210,488	489,669,907	767,812,768	709,438,954	682,913,332.
Scoured	"	41,735,194	39,221,269	49,972,194	52,110,342	55,397,621.
Tops	"	4,988,258	4,090,958	5,219,085	4,519,357	2,559,150.

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 £376,293,681 for the period, or an average of £75,258,736 per annum, of which wool represents 81.55 per cent. Skins, meat and tallow rank next in order of importance.

NET EXPORTS OF PASTORAL PRODUCTS.—AUSTRALIA, 1923-24 TO 1927-28.

Products.	1923-24.	1924-25.	1925-26.	1926-27.	1927-28.
VALUES.					
Animals (living)—	£	£	£	£	£
Cattle	- 31,430	43,628	32,632	43,663	41,352.
Horses	- 36,741	28,062	- 8,655	35,313	65,285
Sheep	40,887	29,793	27,958	15,390	40,512.
Bones	32,301	23,031	22,407	11,783	8,932.
Glue-pieces and Sinews	21,688	10,363	3,071	- 6,442	- 2,503
Glycerine	- 5,965	- 10,898	- 15,586	- 21,284	- 15,097
Hair	- 70,283	- 73,556	- 63,661	- 44,354	- 43,054.
Hoofs	7,723	6,011	10,459	4,768	7,826.
Horns	32,888	47,216	36,102	21,291	25,488
Meats—					
Frozen Beef	1,301,304	4,138,729	3,263,859	1,626,640	2,377,695
Frozen Mutton and Lamb	1,169,667	1,520,655	2,430,430	2,057,443	1,188,388.
Frozen Rabbits and Hares	320,442	310,683	399,039	303,752	309,149
Frozen, Other	95,127	165,002	166,538	78,956	142,475
Potted, and Extract of	- 78,343	- 49,953	- 30,580	- 38,673	- 60,662
Preserved in Tins, etc.	94,094	247,405	328,888	279,167	100,110.
Other (excluding Bacon and Ham)	5,798	4,058	3,083	1,671	6,243
Sausage Casings	154,068	208,673	259,299	179,434	136,567
Skins—					
Hides	338,263	890,639	713,580	605,600	1,401,029.
Sheep	3,057,789	3,773,328	3,413,809	3,330,745	4,385,138
Rabbit and Hare	1,348,508	2,482,933	2,874,582	2,832,128	2,490,709
Other (including Undressed Furs)	798,166	328,325	569,744	1,026,667	831,042
Tallow	745,209	1,703,308	1,584,465	1,402,620	1,043,311
Wool—					
Greasy	48,294,399	55,297,455	56,429,712	53,224,169	58,295,914.
Scoured	6,298,197	6,524,471	5,537,671	5,726,308	6,621,937
Tops	1,161,920	1,119,849	1,035,107	822,713	488,199
Total Values	65,095,676	78,769,210	79,023,942	73,518,868	79,885,985

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 and Sinai, where the rigours of the desert campaign fully tested their powers of endurance.

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 maintained its position until 1925. Since then the recent drought has seriously depleted its stocks.

Particulars of the several States for the past five years are as follows :—

HORSES.—NUMBER, 1923 TO 1927.

Year.	N.S.W. (a)	Vic.	Q'land.	S. Aust.	W. Aust.	Tas.	N.T.	F.C.T. (a)	Total.
1923	656,939	486,075	660,387	258,489	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
1925	649,534	463,051	637,436	244,111	170,563	37,785	46,380	1,501	2,250,361
1926	622,009	447,988	570,690	234,352	166,463	36,830	42,801	1,383	2,122,516
1927	598,377	428,666	547,412	224,027	165,021	35,872	40,108	1,208	2,040,691

(a) 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 486,458.

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, 1923 TO 1927.

Year.	N.S.W.	Vic.	Q'land.	S. Aust.	W. Aust.	Tas.	N.T.	F.C.T.	Total.
	%	%	%	%	%	%	%	%	%
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
1925	28·86	20·58	28·32	10·85	7·58	1·68	2·06	0·07	100·00
1926	29·30	21·11	26·89	11·04	7·84	1·73	2·02	0·07	100·00
1927	29·32	21·00	26·83	10·98	8·09	1·76	1·97	0·05	100·00

The relative changes in distribution are insignificant, the greatest alteration being a decrease of under 2 per cent. in Queensland.

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 since 1923. Particulars for the past five years are as follows :—

HORSES.—NUMBER PER HEAD OF POPULATION, 1923 TO 1927.

Year.	N.S.W.	Vic.	Q'land.	S. Aust.	W. Aust.	Tas.	N. Ter.	Fed. Cap. Ter.	All States
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
1925 ..	0·28	0·27	0·74	0·44	0·46	0·17	12·69	0·38	0·38
1926 ..	0·26	0·26	0·65	0·41	0·44	0·17	10·98	0·28	0·35
1927 ..	0·25	0·25	0·61	0·39	0·43	0·17	9·47	0·21	0·33

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 ..	1928	31,979	Union of South Africa	1926	856
U.S. of America ..	1928	14,029	Cuba ..	1927	759
Argentine Republic ..	1922	9,432	Czecho-Slovakia ..	1925	740
Brazil ..	1920	5,254	Sweden ..	1928	728
China ..	1916	4,401	Dutch East Indies ..	1926	720
Germany ..	1928	3,751	Spain ..	1925	698
Canada ..	1928	3,376	Turkey ..	1926	639
Poland ..	1921	3,290	Lithuania ..	1927	617
France ..	1927	2,927	Denmark ..	1928	518
India (British and Native) ..	1926	2,129	Uruguay ..	1924	510
Australia ..	1927	2,041	Paraguay ..	1918	490
Rumania ..	1927	1,939	Irish Free State ..	1927	429
Japan ..	1926	1,444	Bulgaria ..	1920	398
United Kingdom ..	1928	1,293	Finland ..	1927	396
Jugo-Slavia ..	1928	1,109	Latvia ..	1928	365
Mexico ..	1926	1,036	Netherlands ..	1921	364
Italy ..	1919	990	Philippine Islands ..	1927	336
Colombia ..	1926	980	Chile ..	1925	324
Hungary ..	1923	918	New Zealand ..	1927	304

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, as also are 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 approximations. 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 1927.

Continents, etc.	Number at the date nearest—		Increase (+) or Decrease (–) in 1927.	
	1913.	1927.	Actual Figures.	Percentages.
	,000	,000	,000	%
Europe (excluding Soviet Republics) ..	22,698	22,863	+ 165	+ 0·7
Union of Socialist Soviet Republics ..	35,522	31,258	– 4,264	–12·0
North and Central America ..	26,134	20,465	– 5,669	–21·7
South America ..	18,162	17,653	– 509	– 2·8
Asia (excluding Soviet Republics) ..	4,914	5,394	+ 480	+ 9·8
Africa ..	1,692	2,079	+ 387	+22·9
Oceania ..	2,976	2,445	– 531	–17·8
Total ..	112,098	102,157	– 9,941	– 8·9

Compared with the pre-war totals reductions have taken place in all the continents, with the exception of Africa, where the number of horses is relatively insignificant. The greatest decrease occurred in North and Central America, viz. :—5,669,000, largely as the result of the decline in the United States.

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 5,936 in 1927–28 and 1,785 in 1923–24, and in value between £160,714 in 1924–25 and £59,799 in 1923–24. The total number of horses exported during the five years amounted to 23,910, valued at £645,942, or equal to an annual average of 4,782 for £129,188. The average export price for the period was £27 0s. 4d.; 81 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 £338 19s. 3d., as compared with £27 0s. 4d. per head for the exports for the same period. The average number imported per annum was, however, only 332, and the average annual value, £112,536. The following table gives the imports, exports, and net exports of horses during each of the years from 1923–24 to 1927–28 :—

HORSES.—IMPORTS AND EXPORTS, AUSTRALIA, 1923–24 TO 1927–28.

Year.	Imports.		Exports.		Net Exports.	
	No.	Value.	No.	Value.	No.	Value.
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
1925–26 ..	355	135,124	5,610	126,469	5,255	– 8,655
1926–27 ..	343	111,297	5,619	146,610	5,276	35,313
1927–28 ..	300	87,065	5,936	152,350	5,636	65,285

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 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 droughts of 1922–23 and 1925–26, 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 five years.

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

CATTLE.—NUMBER, 1923 TO 1927.

Year.	N.S.W. (a)	Vic.	Q'land.	S. Aust.	W. Aust.	Tas.	Nor.Ter.	Fed. Cap. Ter. (a)	Total.
1923	2,932,437	1,591,367	6,396,514	(a)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	891,564	225,740	855,285	5,058	13,309,473
1925	2,931,818	1,513,787	6,436,645	373,597	835,911	212,373	970,342	5,312	13,279,785
1926	2,813,144	1,435,761	5,464,845	340,007	827,303	213,112	863,597	5,509	11,963,278
1927	2,848,654	1,327,077	5,225,804	316,314	846,735	210,894	835,390	6,188	11,616,056

(a) 30th June year following.

3. **Proportion in each State.**—Percentages showing the relative importance of the various cattle-breeding States during the years 1923 to 1927 are given hereunder :—

CATTLE.—PERCENTAGE IN EACH STATE, 1923 TO 1927.

Year.	N.S.W.	Vic.	Q'land.	S. Aust.	W. Aust.	Tas.	Nor. Ter.	Fed. Cap. Ter.	Total.
	%	%	%	%	%	%	%	%	%
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
1925	22·08	11·40	48·47	2·81	6·29	1·60	7·31	0·04	100·00
1926	23·51	12·00	45·68	2·84	6·92	1·78	7·22	0·05	100·00
1927	24·52	11·42	44·98	2·72	7·29	1·82	7·19	0·06	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 44.98 in 1927. The largest relative gain since 1923 occurred in New South Wales, whilst a slight increase was recorded in Western Australia, Tasmania, and the Northern Territory.

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

CATTLE.—NUMBER PER HEAD OF POPULATION, 1923 TO 1927.

Year.	N.S.W.	Victoria.	Q'land.	S. Aust.	W. Aust.	Tas.	Nor. Ter.	Fed. Cap. Ter.	All States.
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
1925 ..	1.28	0.90	7.47	0.68	2.24	0.98	265.41	1.35	2.22
1926 ..	1.20	0.84	6.19	0.60	2.18	0.99	221.55	1.12	1.96
1927 ..	1.20	0.76	5.81	0.55	2.16	0.98	191.56	1.08	1.86

5. *Comparison with other Countries.*—In the following comparisons 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 ..	1926	149,184	Cuba	1927	4,786
Soviet Republics ..	1928	66,792	Tanganyika Territory ..	1926	4,706
U.S. of America ..	1928	55,751	Czecho-Slovakia ..	1925	4,691
Argentine Republic ..	1922	37,065	Dutch East Indies ..	1926	4,311
Brazil	1920	34,271	Siam	1927	4,128
Germany	1928	18,386	Irish Free State ..	1927	4,047
China	1921	15,973	Spain	1925	3,794
France	1927	14,941	Jugo-Slavia	1928	3,654
Australia	1927	11,617	French Equatorial and West Africa ..	1924	3,471
Union of South Africa ..	1927	10,412	Kenya	1926	3,413
Canada	1928	8,793	New Zealand	1927	3,258
Poland	1926	8,602	Denmark	1928	3,021
Uruguay	1924	8,432	Nigeria	1927	2,997
United Kingdom	1928	7,973	Sweden	1920	2,737
Madagascar	1925	7,659	Rhodesia	1927	2,716
Turkey	1926	6,537	Bolivia	1926	2,320
Colombia	1926	6,500	Venezuela	1922	2,278
Italy	1919	6,239	Austria	1923	2,162
Mexico	1926	5,585	Netherlands	1921	2,063
Paraguay	1918	5,500	Japan	1926	1,465
Rumania	1927	4,552			

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, 6 ante).

CATTLE.—WORLD'S TOTALS, 1913 AND 1927.

Continents, etc.	Number at the date nearest—		Increase (+) or Decrease (–) in 1927.	
	1913.	1927.	Actual Figures.	Percentages.
	,000	,000	,000	%
Europe (excluding the U.S.S.R.) ..	98,764	100,339	+ 1,575	+ 1.6
Union of Socialist Soviet Republics ..	60,280	67,835	+ 7,555	+12.5
North and Central America	76,485	79,415	+ 2,930	+ 3.8
South America	86,662	101,053	+14,391	+16.6
Asia (excluding the U.S.S.R.) ..	131,300	143,927	+12,627	+ 9.6
Africa	34,537	51,270	+16,733	+48.4
Oceania	13,859	15,476	+ 1,617	+11.7
Total	501,887	559,315	+57,428	+11.4

The number of cattle has increased in all continents since 1913, the most notable advances being in Africa and South America. In these continents the development of the cattle industry has been most marked, the number of cattle having increased by more than 16 and 14 million head respectively since the pre-war year.

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, 1923-24 TO 1927-28.

Year.	Imports.		Exports.		Net Exports.	
	No.	Value.	No.	Value.	No.	Value.
		£		£		£
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
1925-26	173	15,743	10,071	48,375	9,898	32,632
1926-27	103	4,412	10,196	48,075	10,093	43,663
1927-28	89	3,553	11,220	44,905	11,131	41,352

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 £68 4s. 8d. per head, while the average value of the cattle exported during the same period was £4 12s. 5d. 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 1923 to 1927 is given hereunder:—

CATTLE (INCLUDING CALVES) SLAUGHTERED, 1923 TO 1927.

Year.	N.S.W. (a)	Victoria.	Q'land.	S. Aust.	W. Aust.	Tas. (a)	N. Ter.	Fed. Cap. Ter. (a)	Total.
1923	752,376	461,958	566,452	140,979 ^a	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
1925	825,628	523,960	778,060	157,210	110,286	36,824	2,000	456	2,434,424
1926	809,810	499,519	567,640	143,747	101,948	32,989	1,369	2,784	2,159,806
1927	694,527	469,610	739,995	142,557	101,146	36,249	1,854	2,924	2,188,862

(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 1927-28 was estimated at 1,144,072,600 lbs. per annum. The requirements of the local market absorbed 973,318,833 lbs., approximately 85 per cent., leaving a balance of 15 per cent., which was exported as frozen and canned beef. The annual consumption of beef per head of population in Australia averaged 159 lbs. compared with 66 lbs. in the United States of America, 73 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 1923-24 to 1927-28 being as follows:—

BEEF PRESERVED BY COLD PROCESS.—EXPORTS, AUSTRALIA, 1923-24 TO 1927-28.

Country to which Exported.	1923-24.	1924-25.	1925-26.	1926-27.	1927-28.	Total for 5 years.
QUANTITY.						
	lbs.	lbs.	lbs.	lbs.	lbs.	lbs.
United Kingdom ..	62,286,753	175,276,049	124,287,414	64,683,188	93,795,126	520,328,530
Belgium ..	7,728,342	25,679,301	31,760,595	9,749,733	32,307,944	107,225,915
Italy ..	8,511,922	48,938,055	11,764,463	1,920,928	1,163,800	72,299,177
Germany ..	5,437,988	6,777,898	15,600,259	4,114,891	10,610,430	42,541,475
Philippine Islands ..	8,442,695	8,117,712	9,201,185	9,232,659	7,999,407	42,993,658
Egypt ..	3,242,520	6,406,583	4,919,222	6,592,505	7,134,145	28,294,975
Malta ..	2,007,894	3,006,897	3,987,758	3,320,951	3,053,393	15,376,893
Malaya (British) ..	1,908,621	2,012,101	2,062,674	2,211,299	2,069,508	10,264,203
France ..	625,223	2,909,841	3,262,353	341,423	453,417	7,592,257
Hawaiian Islands ..	230,274	996,735	2,942,684	2,287,908	1,784,074	8,241,675
Hong Kong ..	1,444,881	382,300	1,370,380	1,977,457	1,494,124	6,669,232
Gibraltar ..	1,254,888	929,137	1,432,295	813,149	944,639	5,374,108
Japan ..	884,679	981,672	450,557	1,535,490	3,457,822	7,310,220
Netherlands East Indies ..	378,015	254,777	368,333	401,829	301,238	1,704,192
Ceylon ..	319,546	309,781	428,357	564,347	511,965	2,133,996
Other Countries ..	459,699	641,758	251,452	2,450,339	2,017,375	5,820,623
Total ..	105,163,940	283,620,687	214,089,981	112,198,096	169,098,425	884,171,129

VALUE.

	£	£	£	£	£	£
United Kingdom ..	734,814	2,552,775	1,915,739	916,291	1,335,850	7,455,469
Belgium ..	96,270	366,488	487,448	131,172	415,591	1,496,969
Italy ..	115,819	725,510	170,829	26,905	15,336	1,054,399
Germany ..	65,054	105,496	225,063	57,594	136,355	589,562
Philippine Islands ..	105,971	103,781	124,010	128,160	114,973	576,895
Egypt ..	45,858	93,805	80,722	106,018	111,689	438,092
Malta ..	30,658	46,872	62,753	54,095	41,480	235,858
Malaya (British) ..	28,980	32,496	33,927	38,866	36,795	171,064
Hawaiian Islands ..	3,955	16,386	46,325	38,525	6,044	111,235
France ..	7,101	44,539	45,871	4,979	23,703	131,193
Hong Kong ..	19,537	5,567	23,365	31,104	23,675	103,248
Gibraltar ..	14,853	15,458	24,997	13,213	15,360	83,881
Japan ..	12,603	10,806	4,772	20,567	46,271	95,019
Ceylon ..	6,405	5,868	8,324	11,023	10,235	41,860
Netherlands East Indies ..	7,168	3,586	5,835	7,163	5,509	29,261
Other Countries ..	6,833	10,654	4,940	42,318	34,101	98,846
Total ..	1,301,879	4,140,087	3,264,920	1,627,998	2,377,967	12,712,851

The export trade in frozen beef during 1927-28 showed a decided improvement when compared with the previous year. The largest purchaser of Australian beef is the United Kingdom, which during the five years ended 1927-28 took £7,455,469 worth, or about 59 per cent. of the total shipments. The continental demand, which declined considerably in 1926-27, improved during the year under review. The countries in which this improvement was most notable, were the United Kingdom, Belgium, and Germany.

11. Beef Subsidy.—Particulars of the efforts of the Commonwealth Government to assist the beef industry by the passage of the Meat Export Bounties Act and the operations of that measure are contained in previous issues of the Year Book.

§ 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. Within its borders are contained generally one half of the flocks of Australia, and in the returns for the past two years even this high percentage was exceeded.

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 depleted the numbers at successive intervals, but these gaps were as quickly restored, and, despite a decrease of $3\frac{1}{2}$ millions during the drought of 1922, the number reported in 1926 was 104,267,101, the greatest number since the maximum year 1891, when 106,421,068 sheep were depastured. A decline occurred in 1927, when the number was 100,827,476. The falling-off was due to dry conditions, particularly in New South Wales, where the flocks were reduced by more than 5 millions. Notwithstanding this depletion, the number of sheep in Australia at the 31st December, 1928, is estimated to be 106,100,000, or slightly below the record of 1891 above mentioned. This development in spite of the annual slaughter of some ten to twelve million sheep and lambs for the mutton and lamb trade is a striking commentary on the soundness of the sheep and wool industry, and on the excellent seasons experienced in Australia during recent years.

The number of sheep in the several States and Territories for each year from 1923 to 1927 was as follows:—

SHEEP.—NUMBER, 1923 TO 1927.

Year.	New South Wales. (a)	Victoria.	Queens-land.	South Australia.	Western Australia.	Tasmania.	Nor. Ter.	Fed. Cap. Ter. (a)	Total.
1923	41,293,843	11,059,761	16,756,101	6,596,875	6,595,867	1,557,716	4,728	146,157	84,011,048
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
1925	53,687,749	13,740,500	20,663,323	6,810,495	6,861,795	1,619,075	8,030	172,251	103,563,218
1926	55,705,923	14,919,653	16,860,772	7,283,945	7,458,766	1,807,558	6,407	224,077	104,267,101
1927	50,510,000	15,557,067	16,642,385	7,542,345	8,447,480	1,904,955	9,585	213,659	100,827,476

(a) 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 1923 to 1927 are given hereunder:—

SHEEP.—PERCENTAGE IN EACH STATE, 1923 TO 1927.

Year.	N.S.W.	Victoria.	Q'land.	S. Aust.	W. Aust.	Tas.	N. Ter.	Fed. Cap. Ter.	Total.
	%	%	%	%	%	%	%	%	%
1923	49.15	13.16	19.95	7.85	7.85	1.86	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
1925	51.84	13.27	19.95	6.58	6.62	1.56	0.01	0.17	100.00
1926	53.43	14.31	16.17	6.99	7.15	1.73	0.01	0.21	100.00
1927	49.99	15.46	16.54	7.50	8.40	1.89	0.01	0.21	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 loss of 3.44 per cent. in New South Wales during 1927.

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 1923 to 1927 is as follows:—

SHEEP.—NUMBER PER HEAD OF POPULATION, 1923 TO 1927.

Year.	N.S.W.	Vic.	Q'land.	S. Aust.	W. Aust.	Tas.	N. Ter.	Fed. Cap. Ter.	Total.
1923	18.69	6.80	20.66	12.47	18.64	7.11	1.33	55.74	14.61
1924	20.82	7.64	22.79	11.81	17.57	7.34	1.92	55.30	15.86
1925	23.36	8.16	23.99	12.35	18.44	7.46	2.20	43.76	17.28
1926	23.73	8.72	19.11	12.86	19.69	8.42	1.64	45.53	17.06
1927	20.95	8.93	18.51	13.10	21.53	8.82	2.20	37.25	16.14

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. The leading position, so long held by Australia, is now occupied by the United Socialist Soviet Republics. This interchange of positions is due to the fact that figures regarding the number of sheep have been revised, and now include those depastured in Europe and Asia. Serious efforts are being made by the Soviet Government to improve the quality of the wool and the quantity shorn per fleece, and to this end imports of merino sheep were made during 1927. The production of wool, however, only amounted to about 370 million lbs. during the year 1927–28.

SHEEP.—NUMBER IN VARIOUS COUNTRIES.

Country.	Date.	No. of Sheep (,000 omitted).	Country.	Date.	No. of Sheep (,000 omitted).
Soviet Republics ..	1928	123,810	French Morocco ..	1927	7,712
Australia	1927	100,827	Greece	1927	6,442
U.S. of America ..	1928	47,171	French Equatorial and		
Union of South Africa	1927	40,110	West Africa ..	1927	6,328
Argentine Republic ..	1922	36,209	Algeria	1928	5,614
India (British and			Iraq (a)	1926	5,055
Native)	1926	35,049	Bolivia	1926	4,220
New Zealand	1928	27,134	Chile	1925	4,094
United Kingdom ..	1928	24,516	Portugal	1920	3,851
Uruguay	1927	22,500	Canada	1928	3,676
China	1916	22,232	Germany	1928	3,626
Spain	1925	20,067	Irish Free State ..	1927	3,120
Rumania	1927	12,941	Kenya	1926	2,756
Italy	1919	11,754	Mexico	1926	2,698
Turkey	1926	11,702	Basutoland	1927	2,149
Peru	1922	11,335	Sudan (Anglo-Egypt-		
France	1927	10,693	tian)	1927	2,010
Bulgaria	1920	8,923	Poland	1927	1,918
Brazil	1920	7,933	Tanganyika Territory	1927	1,911
Jugo-Slavia	1928	7,722			

(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 1927.

Continents, etc.	Number at the date nearest—		Increase (+) or Decrease (-) in 1927.	
	1913.	1927.	Actual Figures.	Percentages.
	,000	,000	,000	%
Europe (excluding the U.S.S.R.) ..	126,999	129,733	+ 2,734	+ 2.2
United Socialist Soviet Republics ..	111,051	120,237	+ 9,186	+ 8.3
North and Central America	43,148	51,097	+ 7,949	+18.4
South America	100,392	89,642	- 10,750	-10.7
Asia (excluding the U.S.S.R.)	41,802	43,994	+ 2,192	+ 5.2
Africa	76,583	84,118	+ 7,535	+ 9.8
Oceania	109,331	129,947	+ 20,616	+18.9
Total	609,306	648,768	+ 29,462	+ 6.5

7. *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 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 1923–24 to 1927–28 :—

SHEEP.—IMPORTS AND EXPORTS, AUSTRALIA, 1923–24 TO 1927–28.

Year.	Imports.		Exports.		Net Exports.	
	No.	Value.	No.	Value.	No.	Value.
		£		£		£
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
1925–26 ..	2,375	13,873	22,706	41,831	20,331	27,958
1926–27 ..	6,951	34,595	33,169	49,985	26,218	15,390
1927–28 ..	3,045	12,417	33,916	52,929	30,871	40,512

8. *Sheep Slaughtered.*—The number of sheep slaughtered in the several States during each of the years from 1923 to 1927 was as follows :—

SHEEP (INCLUDING LAMBS) SLAUGHTERED, 1923 TO 1927.

Year.	N.S.W. (a)	Victoria.	Q'land.	S. Aust.	W. Aust.	Tas. (a)	Nor. Ter.	Fed. Cap. Ter.(a)	Total.
1923 ..	3,614,457	4,078,273	618,127	956,140	809,379	316,438	..	2,898	10,395,712
1924 ..	3,396,957	3,591,219	446,247	933,426	588,577	276,117	..	2,989	9,235,532
1925 ..	4,244,497	4,194,572	635,335	1,028,533	613,935	286,691	..	7,908	11,011,471
1926 ..	5,600,083	4,528,113	679,266	1,090,756	712,647	310,428	..	19,319	12,940,612
1927 ..	5,009,511	4,732,494	669,742	1,209,608	784,349	328,671	..	22,507	12,756,882

(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 1927–28 averaged 487,027,719 lbs., of which 409,727,384 lbs., or 84 per cent., was consumed locally, leaving a balance of 16 per cent. for exportation. The consumption of mutton and lamb in Australia during the same period averaged 67 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, 8½ lbs.; and United States of America, 5½ 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, valued at £4,321,917, was dispatched in 1922–23. Climatic conditions favoured a considerable output in the next five seasons, but shipments were not large in comparison, owing chiefly to the sound position of wool and depressed meat markets overseas.

As in the case of frozen beef, the principal customer in this trade is the United Kingdom, which absorbed 92 per cent. of the total quantity exported from Australia during the last five years, while the balance was shipped mainly to Malaya (British), Canada, Egypt, Hong Kong, Ceylon, and Malta.

MUTTON AND LAMB PRESERVED BY COLD PROCESS.—EXPORTS, AUSTRALIA, 1923-24 TO 1927-28.

Country to which Exported.	1923-24.	1924-25.	1925-26.	1926-27.	1927-28.	Total for 5 years.
QUANTITY.						
	lbs.	lbs.	lbs.	bs.	lbs.	lbs.
United Kingdom ..	35,996,594	46,025,699	80,584,284	88,056,762	40,449,570	291,112,909
Malaya (British) ..	846,641	1,072,104	994,153	1,033,736	1,148,571	5,095,205
Egypt ..	463,332	739,176	617,805	338,843	360,149	2,519,305
Hong Kong ..	491,660	446,076	601,292	439,373	481,309	2,459,710
Canada ..	251,046	216,121	545,043	1,229,936	888,978	3,131,124
Ceylon ..	415,729	443,937	411,241	468,406	427,853	2,167,166
Malta ..	..	..	707,093	642,839	502,182	1,852,114
Philippine Islands ..	184,482	167,118	154,014	135,426	166,208	807,248
Hawaiian Islands ..	..	..	416,307	390,705	499,812	1,306,824
France ..	..	..	342,908	514,702	473,415	1,331,025
Union of South Africa ..	156,102	..	..	51,770	46,558	254,430
Other Countries ..	999,763	1,161,231	307,830	217,656	918,949	3,604,829
Total ..	39,805,349	50,271,462	85,681,970	93,520,154	46,362,954	315,641,889
VALUE.						
	£	£	£	£	£	£
United Kingdom ..	1,067,571	1,397,291	2,298,400	1,942,956	1,042,388	7,748,606
Malaya (British) ..	25,087	34,548	27,904	24,260	32,299	144,138
Egypt ..	11,021	20,751	15,226	6,067	9,052	62,147
Hong Kong ..	14,969	14,144	16,269	9,142	12,707	67,231
Canada ..	6,216	6,503	15,210	30,034	25,523	83,486
Ceylon ..	12,296	14,018	10,751	9,522	11,905	56,492
Malta ..	..	..	15,158	11,002	9,630	35,790
Philippine Islands ..	5,486	5,556	4,226	2,893	4,453	22,914
Hawaiian Islands ..	..	..	13,620	10,101	13,372	37,593
France ..	..	..	6,430	7,153	7,065	21,248
Union of South Africa ..	4,167	..	..	576	947	5,690
Other Countries ..	24,057	29,241	6,911	3,901	18,065	82,175
Total ..	1,170,850	1,522,082	2,430,465	2,057,607	1,188,506	8,369,510

§ 5. Wool.

1. **General.**—Australia is the leading wool-growing country in the world. With less than one-sixth of the world's sheep Australia produced in 1927-28, 25 per cent., or one-quarter of the world's supply. Her contribution was even more important as it represented one-half of the world's production of fine quality merino wool. 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 under 6 per cent. of the total production.

2. **Value.**—Wool is the chief factor in the pastoral wealth of Australia and the nation's prosperity is largely dependent upon the satisfactory sale of its annual wool clip. Based upon the export values of the produce of the various States the output for the season 1927-28 was valued at £75,634,000 compared with £69,430,000 in the previous year, £81,430,000 in the record price year 1924-25, and £70,915,600 the average of the previous five seasons. During the period 1922-23 to 1926-27 the export of wool averaged 46.1 per cent. of the value of the total shipments of merchandise from Australia, and in 1927-28 the ratio increased to 48.9 per cent.

3. 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 17 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 and one-sixth pounds of "greasy" wool are on the average required to produce one pound of "scoured and washed."

4. Production.—(i) *Quantity.* The annual shearing of the live sheep provides the main source of Australia's wool supply, the resultant clip forming about 89 per cent. of the total production. A considerable quantity, approximately 6½ per cent. of the total output is obtained by fellmongering, or removing wool from skins of slaughtered sheep, while the remaining 4½ per cent. is an estimation of the quantity of wool exported on sheepskins. Statistics of wool production are compiled from data received from growers, fellmongers, etc. As the result of recent investigations made in some of the States serious understatements by landholders have been disclosed, and it is believed that this practice is general throughout the Commonwealth. Exhaustive inquiries have enabled the Statisticians of the States referred to satisfactorily to revise their original figures, and provisional amendments have been inserted pending similar action in the remaining States. The following table furnishes the revised figures for each State and the Commonwealth during the past five seasons:—

WOOL.—TOTAL PRODUCTION, 1923-24 TO 1927-28.

State.	1923-24.	1924-25.	1925-26.	1926-27.	1927-28.
	lbs.	lbs.	lbs.	lbs.	lbs.
New South Wales(a) ..	303,032,000	369,118,000	402,490,000	499,322,000	443,860,000
Victoria ..	107,513,361	133,484,871	139,076,017	151,624,526	148,503,795
Queensland ..	131,913,075	152,131,544	158,744,544	129,435,804	136,544,333
South Australia ..	57,881,936	62,438,953	69,007,266	72,365,200	78,369,918
Western Australia ..	50,525,440	47,204,687	51,827,080	59,300,023	67,549,734
Tasmania ..	11,712,273	12,483,452	12,564,000	12,333,000	13,272,000
Northern Territory(b)	20,000	20,000	30,000	30,000	30,000
Total ..	662,598,085	776,881,507	833,738,907	924,410,553	888,129,780

(a) Including Federal Capital Territory. (b) Approximate figures.

(ii) *Estimate for 1928-29.* Although the returns are not yet complete the total wool production of the Commonwealth during 1928-29 is officially estimated at 950,000,000 lbs., valued at approximately £69,572,000.

5. 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.

6. 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 3,548,541,000 lbs. in 1928, Australia's contribution amounted to 888,130,000 lbs., or more than 25 per cent. of the world's supply.

WOOL(a).—WORLD'S PRODUCTION, 1909 TO 1928.

Countries.	Average Annual Pre-War Production.(b)	Production.	
		1927.	1928.(c)
	lbs.	lbs.	lbs.
North America—			
United States	314,110,000	328,137,000	351,013,000
Canada	11,210,000	18,673,000	19,611,000
Mexico	7,000,000	2,000,000	1,320,000
Total	332,320,000	348,810,000	371,944,000
Central America and West Indies	1,000,000	750,000	
South America—			
Argentine Republic	358,688,000	331,000,000	342,250,000
Brazil	35,000,000	26,386,000	24,200,000
Chile	17,430,000	35,000,000	33,000,000
Peru	9,940,000	10,000,000	10,000,000
Uruguay	156,968,000	130,000,000	135,000,000
All other	9,324,000	20,350,000	17,147,000
Total	587,350,000	552,736,000	561,597,000
Europe—			
Austria	15,360,000	1,200,000	837,000
Belgium	1,060,000	775,000	800,000
Bulgaria	23,700,000	22,000,000	21,495,000
Czecho-Slovakia .. .. .	..	3,370,000	3,290,000
Denmark	3,508,000	3,180,000	992,000
Estonia .. .. .	..	2,396,000	1,850,000
Finland .. .. .	..	5,000,000	4,980,000
France	80,688,000	47,447,000	49,604,000
Germany	52,000,000	38,500,000	31,905,000
Greece	14,000,000	17,500,000	16,625,000
Hungary	17,637,000	16,500,000	11,500,000
Iceland	1,980,000	(d)	1,642,000
Italy	55,000,000	55,800,000	49,500,000
Jugo-Slavia	25,446,000	37,400,000	30,000,000
Netherlands	3,556,000	3,960,000	3,960,000
Norway	8,160,000	6,232,000	5,515,000
Poland	7,100,000	4,300,000	9,839,000
Portugal	10,000,000	6,000,000	6,325,000
Rumania	13,228,000	55,000,000	55,000,000
Russia	320,000,000	237,136,000	370,272,000
Spain	72,000,000	104,500,000	100,000,000
Sweden	2,875,000	2,200,000	1,600,000
Switzerland	1,049,000	660,000	850,000
Turkey	28,000,000	..	..
United Kingdom	134,000,000	117,676,000	106,112,000
Irish Free State .. .. .	..	12,845,000	13,578,000
All other .. .. .	..	7,842,000	7,327,000
Total	890,347,000	809,419,000	905,398,000

(a) Computed on "greasy" basis. (b) Average for years 1909 to 1913 inclusive. (c) Where 1928 figures were not obtainable, an earlier figure or an unofficial estimate has been inserted. (d) Included with Denmark.

WOOL(a).—WORLD'S PRODUCTION 1909 TO 1928—continued.

Countries.	Average Annual Pre-War Production.(b)	Production.	
		1927.	1928.(c)
	lbs.	lbs.	lbs.
Asia—			
British India	60,000,000	55,000,000	70,000,000
China	50,000,000	60,000,000	55,505,000
Persia	12,146,000	18,000,000	14,000,000
Russia in Asia	60,000,000	79,500,000	(d)
Turkey in Asia	90,000,000	11,300,000	11,000,000
All other	1,000,000	51,972,000	56,622,000
Total	273,146,000	275,772,000	207,127,000
Africa—			
Algeria	35,221,000	36,800,000	38,764,000
British South Africa	165,888,000	240,000,000	285,000,000
Tunis	3,735,000	5,700,000	3,164,000
Morocco	14,850,000	38,650,000	21,627,000
All other	30,000,000	29,250,000	18,374,000
Total	249,694,000	350,400,000	366,929,000
Oceania—			
Australia	741,377,000	924,411,000	888,130,000
New Zealand	198,474,000	202,386,000	235,546,000
Total	939,851,000	1,126,797,000	1,123,676,000
Total all other Countries	13,000,000	15,000,000	..
GRAND TOTAL	3,286,708,000	3,103,778,000	3,536,671,000

(a) Computed on "greasy" basis. (b) Average for years 1909 to 1913 inclusive. (c) Where 1928 figures were not obtainable, an earlier figure or an unofficial estimate has been inserted. (d) Included with Russia in Europe.

7. **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, the total shown for 1927-28 includes 301,186 lbs. as in the grease of wool used in the manufacture of hats :—

**WOOL.—GREASY, USED IN LOCAL WOOLLEN, TWEED, AND TOP MILLS,
1923-24 TO 1927-28.**

State.	1923-24.	1924-25.	1925-26.	1926-27.	1927-28.
	lbs.	lbs.	lbs.	lbs.	lbs.
New South Wales	14,547,744	12,798,722	15,332,166	15,394,528	12,038,830
Victoria	13,068,648	14,420,497	17,642,328	29,020,842	24,075,102
Queensland	1,317,521	1,102,110	2,192,482	3,373,800	3,591,730
South Australia	586,800	536,870			
Western Australia			3,321,213	4,337,881	4,400,698
Tasmania	963,369	1,931,814			
Total	30,484,082	30,790,013	38,488,187	52,127,351	44,106,360

The total consumption of wool in Australia cannot be accurately estimated, as particulars in respect of all wool-using establishments are not available. The figures given above, however, are furnished by the largest consumers, and approximate the total quantity used in local manufacture.

8. Exports of Wool.—(i) *Greasy—Quantities.* Of the total weight of wool expressed in terms of "greasy" shipped overseas during the past five years slightly more than 34½ per cent. were sent to the United Kingdom, practically the same percentage as was dispatched in pre-war years. The other leading consignees since 1922–23 were France, Japan, Germany, Belgium, United States of America, and Italy, the principal continental countries taking 47½ per cent., and America and Japan 16½ per cent. of the total shipments. The following table shows for the years 1923–24 to 1927–28 the quantities of "greasy" wool exported, and the principal countries of destination:—

WOOL IN THE GREASE.—EXPORTS, AUSTRALIA, 1923–24 TO 1927–28.

Country to which Exported.	1923–24.	1924–25.	1925–26.	1926–27.	1927–28.	Total for 5 years.
	lbs.	lbs.	lbs.	lbs.	lbs.	lbs.
United Kingdom ..	163,169,820	175,937,327	256,078,293	211,874,803	196,106,241	1,003,166,484
France ..	121,268,001	114,676,170	224,052,940	174,426,470	140,913,531	775,337,121
Japan ..	45,455,153	53,015,265	59,595,292	78,913,977	106,399,417	343,379,104
Germany ..	31,422,309	39,595,031	65,802,691	97,808,703	95,402,154	330,030,888
Belgium ..	48,011,894	36,682,734	64,602,486	76,801,243	76,052,767	302,221,124
United States of America	31,909,668	38,501,358	61,317,078	41,446,243	27,030,377	200,264,624
Italy ..	25,143,698	28,752,441	34,173,784	28,185,823	34,691,092	150,946,838
Netherlands ..	14,091,947	2,977,889	1,472,172	1,090,882	100,604	19,732,994
India ..	1,598,944	770,543	193,292	448,275	778,328	3,789,382
Canada ..	697,794	483,127	461,719	338,045	177,208	2,157,893
Other Countries ..	1,196,811	875,712	1,353,614	925,744	11,157,264	15,509,145
Total ..	483,966,039	492,267,097	769,104,270	712,350,208	688,847,983	3,146,535,597

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

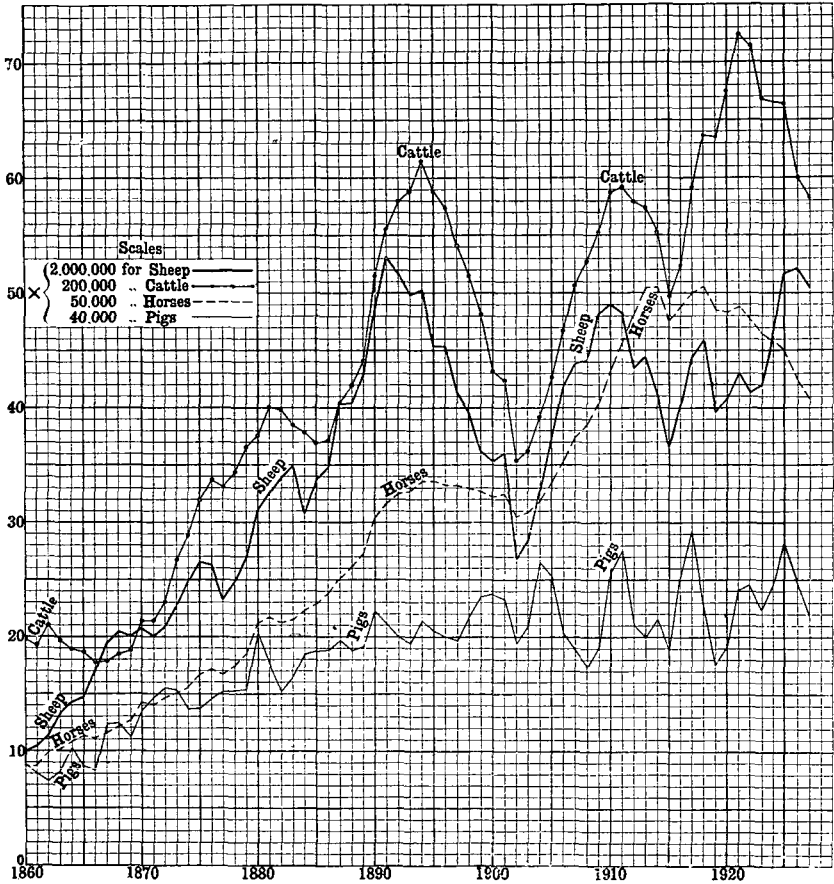
WOOL, SCOURED AND WASHED(a).—EXPORTS, AUSTRALIA, 1923–24 TO 1927–28.

Country to which Exported.	1923–24.	1924–25.	1925–26.	1926–27.	1927–28.	Total for 5 years.
	lbs.	lbs.	lbs.	lbs.	lbs.	lbs.
United Kingdom ..	24,664,470	27,181,826	32,431,422	30,113,626	19,242,933	133,684,277
France ..	8,451,562	5,609,547	9,452,561	10,078,990	9,193,140	42,785,800
Japan ..	5,010,121	3,462,119	6,484,570	5,002,337	3,179,822	23,138,969
Belgium ..	3,749,960	3,179,143	3,295,602	5,739,697	6,266,931	22,231,333
Germany ..	2,469,208	1,979,909	1,780,997	5,344,667	7,004,132	18,578,913
United States of America	449,143	713,661	1,037,828	305,374	796,867	3,352,873
Canada ..	582,580	441,424	506,608	320,900	288,396	2,139,908
Italy ..	490,020	413,878	308,316	294,957	395,277	1,902,448
Netherlands ..	957,687	13,995	28,470	..	23,653	1,028,805
India ..	233,934	212,006	8,395	1,816	17,310	473,461
Other Countries ..	297,967	448,554	601,259	534,329	7,454,477	9,336,586
Total ..	47,356,652	43,661,062	56,036,028	57,736,693	53,862,938	258,653,373

(a) Including "tops."

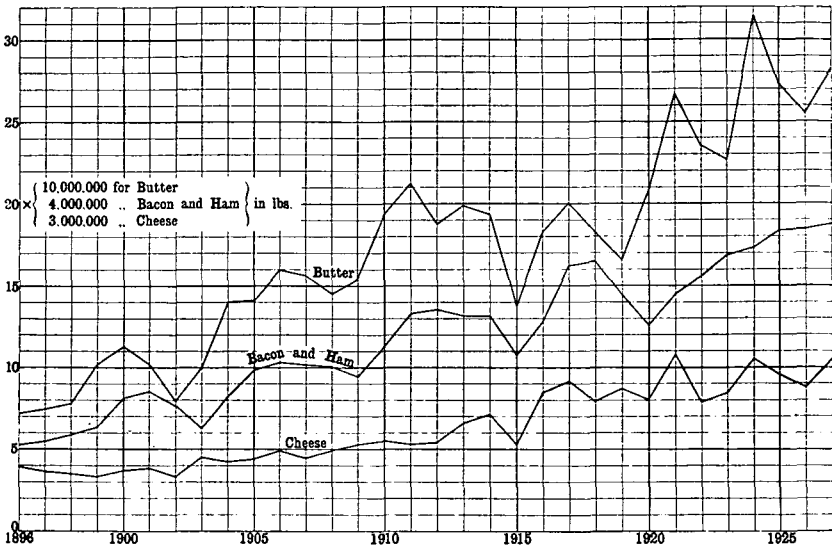
The figures for "scoured and washed wool" include tops, amounting in 1923–24 to 4,988,258 lbs., valued at £1,161,920; in 1924–25, 4,090,958 lbs., valued at £1,119,849; in 1925–26, 5,953,442 lbs., valued at £1,162,877; in 1926–27, 4,519,357 lbs., valued at £822,713; and in 1927–28, 2,559,159 lbs., valued at £488,199. The total exports of wool tops during the last five years amounted to 22,111,174 lbs., valued at £4,755,558, of which 18,996,778 lbs., or more than 85 per cent., were shipped to Japan.

NUMBER OF HORSES, CATTLE, SHEEP, AND PIGS—AUSTRALIA, 1860 TO 1927.



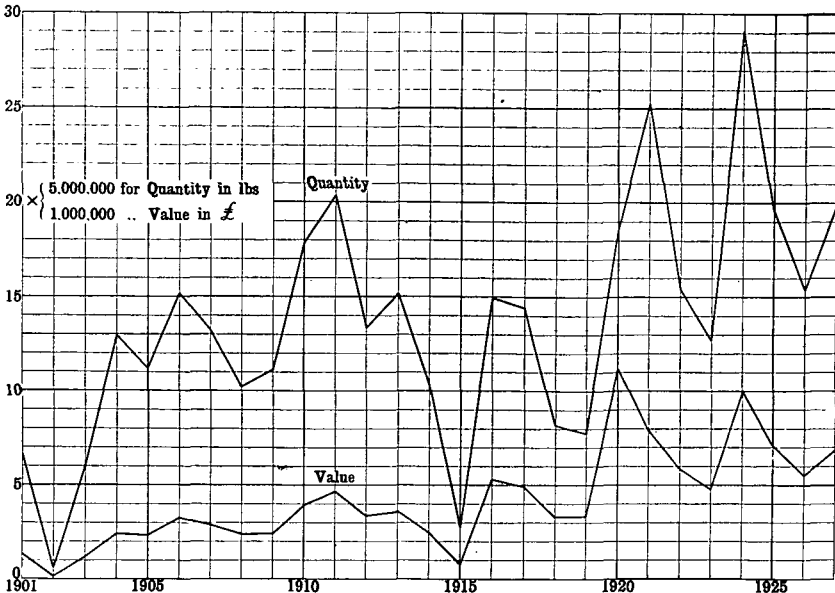
EXPLANATION.—The base of each small square represents an interval of one year, and the vertical side 2,000,000 in the case of sheep, 200,000 for cattle, 50,000 for horses, and 40,000 for pigs.

PRODUCTION OF BUTTER, CHEESE, AND BACON AND HAM—AUSTRALIA
1896 TO 1927.



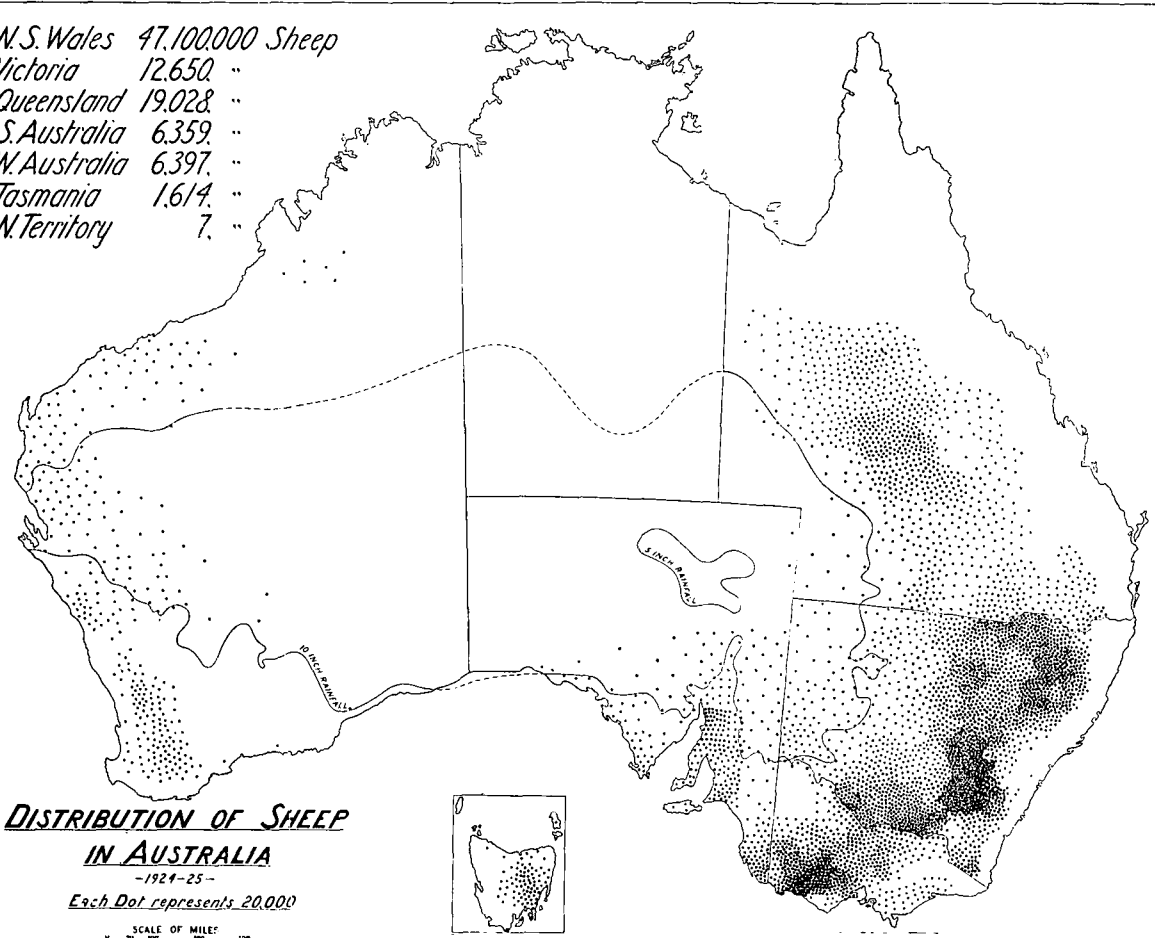
EXPLANATION.—The base of each small rectangle represents an interval of one year, and the vertical height of each denotes in the case of butter 10,000,000 lbs.; in the case of bacon and ham 4,000,000 lbs.; and in the case of cheese 3,000,000 lbs.

QUANTITY AND VALUE OF NET EXPORTS OF BUTTER FROM AUSTRALIA, 1901 TO 1927.



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.

N.S. Wales 47,100,000 Sheep
Victoria 12,650 ..
Queensland 19,028 ..
S. Australia 6,359 ..
W. Australia 6,397 ..
Tasmania 1,614 ..
N. Territory 7 ..

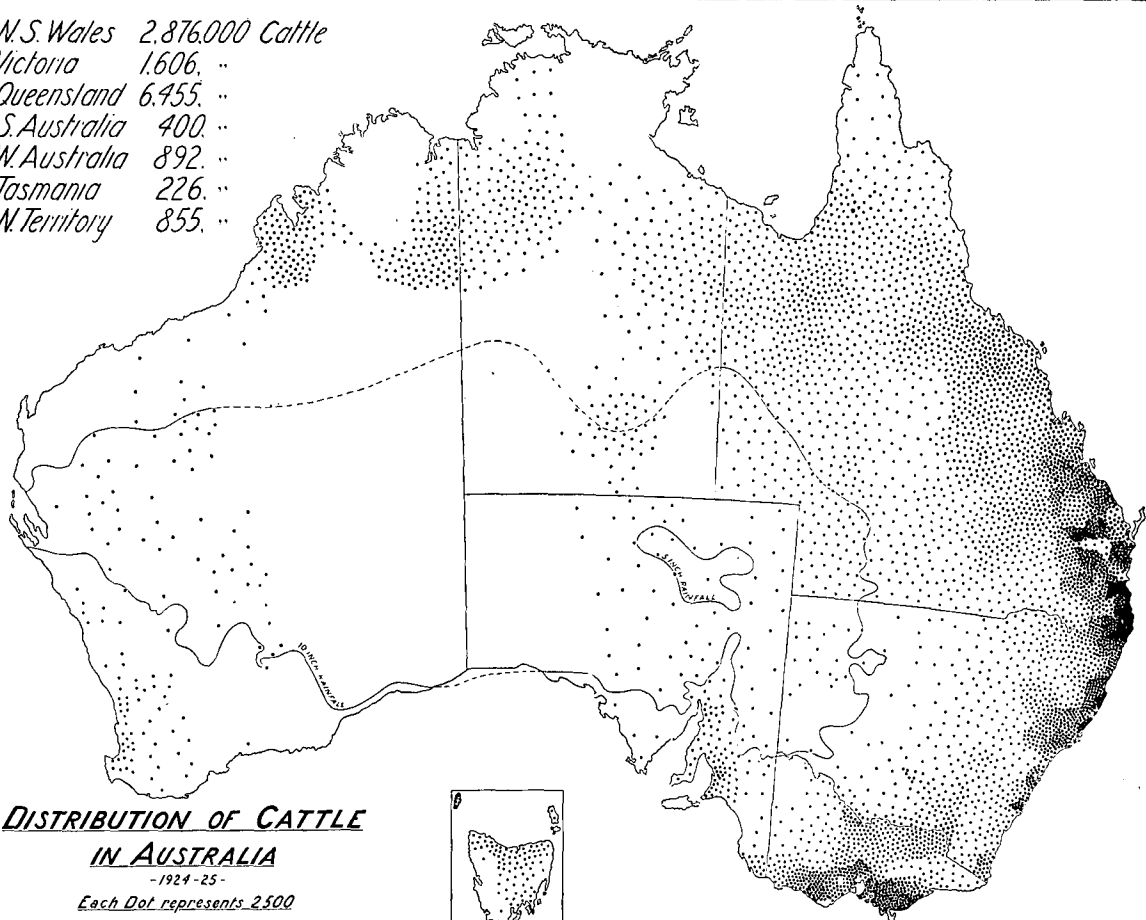


***DISTRIBUTION OF SHEEP
 IN AUSTRALIA***

-1924-25-
 Each Dot represents 20,000

SCALE OF MILES

N.S. Wales 2,876,000 Cattle
Victoria 1,606,000 ..
Queensland 6,455,000 ..
S. Australia 400,000 ..
W. Australia 892,000 ..
Tasmania 226,000 ..
N. Territory 855,000 ..



DISTRIBUTION OF CATTLE
IN AUSTRALIA
 -1924-25-

Each Dot represents 2,500

SCALE OF MILES
 0 25 50 75 100

(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, 1923-24 TO 1927-28.

Country to which Exported.	1923-24.	1924-25.	1925-26.	1926-27.	1927-28.	Total for 5 years.
	£	£	£	£	£	£
United Kingdom ..	20,136,750	24,386,464	23,195,387	19,013,978	19,993,795	106,726,374
France ..	12,278,938	12,484,097	15,821,883	13,164,721	11,960,477	65,710,116
Japan ..	6,212,881	7,479,586	5,869,969	7,868,883	10,316,846	37,748,165
United States of America	4,323,239	5,926,430	6,076,012	4,080,960	3,105,212	23,511,853
Germany ..	3,576,436	4,929,589	5,034,599	7,920,677	9,080,643	30,541,944
Belgium ..	4,951,127	3,844,335	4,221,646	5,507,034	6,186,070	24,710,212
Italy ..	2,634,990	3,327,166	2,523,541	2,156,454	2,944,103	13,586,254
Netherlands ..	1,625,493	367,651	117,408	89,078	13,527	2,213,157
Canada ..	154,323	162,395	121,359	69,695	79,137	586,909
India ..	123,550	108,522	14,897	23,670	53,026	323,665
Other Countries ..	179,431	246,910	213,175	159,210	2,364,282	3,163,008
Total ..	56,197,158	63,263,145	63,209,876	60,054,360	66,097,118	308,821,657

9. *Average Export Value.*—The average values per pound of Australian wool according to the export returns for the year 1913 and for each of the past five years have been as follows :—

AUSTRALIAN WOOL.—EXPORT VALUE PER POUND, 1913 TO 1928-29.

Description.	1913.	1924-25.	1925-26.	1926-27.	1927-28.	1928-29.
	d.	d.	d.	d.	d.	d.
Greasy	9.70	27.10	17.63	17.99	20.49	17.57
Scoured	17.27	39.81	26.57	26.25	31.87	28.72

10. *Exports and Local Sales of Wool, States, 1927-28.*—Wool selling in Australia has been developed to such a stage that practically all of the wool grown is now disposed of locally 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, Albury, Melbourne, Geelong, Ballarat, Brisbane, Adelaide, Perth, Hobart, and Launceston.

The following table shows the number of bales of wool exported oversea from each State during the season ended 30th June, 1928, and the number sold in each State prior to shipment. 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 oversea shipments and sales.

WOOL.—EXPORTS AND LOCAL SALES, SEASON 1927-28.

State.	Oversea Exports.		Local Sales.(a)	
	Bales.	%	Bales.	%
New South Wales ..	1,142,448	46.16	1,067,050	44.24
Victoria	551,059	22.27	(b)570,431	23.65
Queensland	347,417	14.04	342,018	14.18
South Australia ..	213,906	8.64	241,146	10.00
Western Australia ..	188,191	7.60	153,154	6.35
Tasmania	31,707	1.29	38,074	1.58
Total	2,474,728	100.00	2,411,873	100.00

(a) Including wool sold to local woollen mills, scourers, etc. (N.S.W.).

(b) Including wool sold at Albury

11. Exports and Local Sales of Wool, Australia, 1895 to 1928.—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 1928.

Year ended 30th June.				Oversea 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
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
1926	..	..	..	2,666,473	2,655,334	99.58
1927	..	..	..	2,493,397	2,480,472	99.48
1928	..	..	..	2,474,728	2,411,873	97.46

(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, and have consequently been omitted. Excellent selling conditions have existed in Australia since 1922–23, and unusually high percentages of wool have been sold before shipment during each of the past five years. It should be remembered however that the ratio of sales to shipments is somewhat vitiated by the overlapping of the respective seasons, and the inclusion in the sales of wool for local consumption. As the purchases by Australian manufacturers are increasing in volume, an effort has been made to ascertain the actual percentage of wool sold prior to shipment. After eliminating the disturbing factors mentioned above the ratio of sales to shipments during the past five years averaged approximately 90 per cent.

12. 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, 1927–28.

Description of Wool.	N.S.W.	Victoria. (a)	Q'land.	S. Aust.	W. Aust.	Tasmania.	Total.
	Bales.	Bales.	Bales.	Bales.	Bales.	Bales.	Bales.
Greasy	999,969	562,514	314,117	238,211	151,900	38,074	2,304,785
Scoured	67,081	7,917	27,901	2,935	1,254	..	107,088
Total	1,067,050	570,431	342,018	241,146	153,154	38,074	2,411,873
Fleece, etc.	1,017,005	535,248	331,626	231,094	140,070	36,952	2,291,995
Lambs'	50,045	35,183	10,392	10,052	13,084	1,122	119,878
Total	1,067,050	570,431	342,018	241,146	153,154	38,074	2,411,873
Merino	963,760	362,896	340,614	229,796	148,875	7,405	2,053,346
Crossbred and all strong breeds..	103,290	207,535	1,404	11,350	4,279	30,669	358,527
Total	1,067,050	570,431	342,018	241,146	153,154	38,074	2,411,873

(a) Including wool sold at Albury (N.S.W.).

WOOL.—LOCAL SALES, DESCRIPTIONS, 1927-28—continued.

Description of Wool.	N.S.W.	Victoria. (a)	Q'land.	S. Aust.	W. Aust.	Tasmania.	Total.
Greasy ..	% 93.71	% 98.61	% 91.84	% 98.78	% 99.18	% 100.00	% 95.56
Scoured ..	6.29	1.39	8.16	1.22	0.82	..	4.44
Total ..	100.00	100.00	100.00	100.00	100.00	100.00	100.00
Fleece, etc. ..	95.31	93.83	96.96	95.83	91.46	97.05	95.03
Lambs' ..	4.69	6.17	3.04	4.17	8.54	2.95	4.97
Total ..	100.00	100.00	100.00	100.00	100.00	100.00	100.00
Merino ..	90.32	63.62	99.59	95.29	97.21	19.45	85.13
Crossbred and all strong breeds ..	9.68	36.38	0.41	4.71	2.79	80.55	14.87
Total ..	100.00	100.00	100.00	100.00	100.00	100.00	100.00

(a) Including wool sold at Albury (N.S.W.).

In the following table comparisons are made between the various descriptions of wool marketed during the years 1911-12 to 1927-28 :—

WOOL.—LOCAL SALES, DESCRIPTIONS, 1911-12 to 1927-28.

Year.	Greasy.	Scoured.	Fleece, Etc.	Lambs'.	Merino.	Cross- bred.	Total Sales.
	%	%	%	%	%	%	%
1911-12 ..	91.58	8.42	94.95	5.05	81.35	18.65	100.00
1915-16 ..	88.43	11.57	95.79	4.21	78.42	21.58	100.00
1919-20 ..	85.94	14.06	94.86	5.14	66.11	33.89	100.00
1923-24 ..	94.46	5.54	95.58	4.42	80.29	19.71	100.00
1925-26 ..	96.67	3.33	93.46	6.54	82.05	17.95	100.00
1926-27 ..	95.76	4.24	94.41	5.59	83.22	16.78	100.00
1927-28 ..	95.56	4.44	95.03	4.97	85.13	14.87	100.00

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 1927-28 season amounted to nearly 96 per cent. Of fleece and lambs' wool, the former represented 95.03, and the latter 4.97 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, a considerable portion 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. 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 85.13 in 1927-28, while crossbred declined from 33.89 to 14.87 per cent. during the same period. The requirements of the mutton and lamb trade, and the advance of closer settlement with the 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.

13. 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 1927-28 :—

WOOL.—LOCAL SALES, PERCENTAGES OF DESCRIPTIONS, 1927-28.

Description of Wool.	N.S.W.	Victoria.	Q'land.	S. Aust.	W. Aust.	Tasmania.	Total.
	%	%	%	%	%	%	%
Greasy ..	43.39	24.41	13.63	10.34	6.59	1.64	100.00
Scoured ..	62.64	7.39	26.05	2.74	1.18	..	100.00
Fleece, etc. ..	44.37	23.35	14.47	10.08	6.11	1.62	100.00
Lambs' ..	41.74	29.34	8.67	8.39	10.92	0.94	100.00
Merino ..	46.94	17.67	16.59	11.19	7.25	0.36	100.00
Crossbred and all strong breeds ..	28.80	57.89	0.39	3.17	1.18	8.57	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, comes 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 few 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 adapted for the growth of fine wool, and it is probable that this process of refinement will tend towards the ultimate abandonment of coarse wool-growing in Australia.

14. The Wool Market.—(i) *The 1927-28 Season.* The 1927-28 wool-selling season can be described as the most successful in the history of the trade. It was marked, as in the case of the previous year, by a sustained demand for all descriptions of wool at prices which yielded a satisfactory return to wool-growers. Whilst the clip did not reach the proportions of the preceding year, its total value, based upon export price, has been exceeded on one occasion only, i.e., 1924-25. The clip was well-grown, finer in texture than that of the previous season, of good length and sound in staple. The fineness is attributed to the dry conditions under which it was grown. These conditions prevailed generally throughout the greater portion of the continent except in Queensland where drought conditions were severe.

During the year the sales figures amounted to 2,411,873 bales, compared with 2,480,472 bales of the previous year. In 1925-26, however, the sales were augmented by 500,000 bales of carry-over wool, whereas the sales during 1927-28 represent current production only. Values appreciated considerably during the season, the average bale realizing £2 16s. 4d. more than the previous year, while the aggregate sales amounted to £60,873,662, as against £55,610,468 in 1926-27.

The total value realized at auction in 1927-28, i.e., £60,873,662 has never been exceeded. Although the top prices were higher than those obtained for the previous year they were below the record mark obtained for the various descriptions excepting greasy merino lambs, which rose from 48½d. to 51½d. per lb.

The season's record for greasy merino fleece was secured for a line of E.D. in block wool sold in Tasmania, the second year in succession that this centre has occupied so prominent a position. The Geelong market secured no less than nine records, Brisbane three, Melbourne two, Tasmania and Albury one each.

(ii) *Comparison with Pre-war Prices.* In the following table a comparison of the season's record prices is made with the previous year and with pre-war appraisement, and the highest post-war points :—

COMPARISON OF RECORD WOOL PRICES IN AUSTRALIA, 1913-14 TO 1927-28.

Description.	1913-14.	Appraisal- ment.	1925-26.	1926-27.	1927-28.
Greasy Merino—	<i>d.</i>	<i>d.</i>	<i>d.</i>	<i>d.</i>	<i>d.</i>
Fleece	20½	31½	42½	41½	45½
Broken	16½	27¼	32½	27½	31½
Pieces	14½	26	29½	26½	29½
Bellies	13	21½	26½	24½	27½
Locks	8½	13	16½	15½	20
Lambs	29½	27½	33½	46½	51½
Greasy Comeback—					
Fleece	16½	31	34½	32½	34½
Lambs	16½	24½	26½	30	39½
Greasy Crossbred—					
Fleece	15	29½	28	27½	32½
Lambs	16½	23½	23½	24½	32
Scoured Merino—					
Fleece	28	49	48½	47	51½
Pieces	24½	40½	42½	42	48
Lambs	23½	44	39½	41	46½
Scoured Crossbred—					
Fleece	20½	40½	31	32	39½

(iii) *Record Prices.* The records secured for the principal descriptions of wool by the leading brands since 1919-20 are shown below, together with the selling centre and season of sale:—

RECORD PRICES OBTAINED FOR WOOL IN AUSTRALIAN MARKETS,
1919-20 TO 1927-28.

Description.	Price.	Brand.	Bales.	Selling Centre.	Season.
Greasy Merino :	<i>d.</i>				
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	51½	Ware (conj.)	2	Geelong	1927-28
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	Innisfail Downs/BB	18	Brisbane	1924-25
Lambs	59½	Garomna	4	Brisbane	1924-25
Scoured crossbred :					
Fleece	52	Tomslake	9	Sydney	1923-24

Although 53½*d.* 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 109*d.* secured in London for the Geelong wool "NC" in February, 1920, while a line of scoured wool sold at London in March, 1920, realized 136*d.* per lb. In the early days John Macarthur sold wool at 126*d.* per lb., and in 1827 the "Sydney Gazette" contained an authentic record of Macarthur having secured 196*d.* 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.

(iv) *Wool Realization Scheme.* The British Australian Wool Realization Association Ltd. ("B.A.W.R.A.") was formed on the 27th January, 1921, for the purpose of realizing the large stock of wool remaining at the close of the Imperial Wool Purchase Scheme, which covered part of the 1916-17 clip and the complete clips of the three following seasons. Under the Imperial Purchase Scheme the British Government bought the whole of the Australian wool at a flat rate of 15½d. per pound, and at its termination the Australian grower had received full payment through the Central Wool Committee. The conditions of sale to the British Government contained the provision that, when wool was sold for civilian purposes, the profits therefrom should be divided equally between the British Government and the Commonwealth Government, the latter representing the growers. As all the wool had been paid for and there was a credit in cash from sales of wool and economies effected by the Central Wool Committee and some 1,836,005 bales remained unsold, there were substantial realizable profits to be divided between the two parties to the Imperial Wool Contracts. On its formation "B.A.W.R.A." automatically became the owner of half the Australian carry-over wool, and was appointed agent for the sale of the British Government's half of such Australian wools, the New Zealand and Falkland Island carry-over wools owned by the British Government, also a large quantity of Australian and New Zealand sheepskins. 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. "B.A.W.R.A." interests, which were transferred by the Central Wool Committee to the Association consisted of cash, wool and other assets. They were assessed and capitalized at £22,000,000; and subject to certain reservations, each supplier of Australian wool during the Imperial Purchase Scheme was allotted negotiable documents in proportion to the appraised value of the wool which he had contributed. 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." was sold in three and a half years, and passed into consumption together with the current clips of the wool-growing countries.

The following statement provides a summary of the payments made to wool-growers under the Imperial Wool Purchase Scheme and of the distribution of profits accruing to growers therefrom to 31st December, 1927 :—

**STATEMENT OF AMOUNTS DISTRIBUTED BY CENTRAL WOOL COMMITTEE
AND "B.A.W.R.A." TO 31st DECEMBER, 1927.**

1916—November	..	Initiation of Imperial Wool Purchase Scheme.	
1917—January 3rd	..	First appraisalment of wool.	
1920—June 30th	..	Last appraisalment of wool.	
		Total f.o.b. value of wool and sheepskins	£171,518,891
1920—October 27th	..	Payment by Central Wool Committee of 5 per cent. profits dividend	£7,333,700
1921—January	..	Formation of "B.A.W.R.A." Limited— Issue of Priority Wool Certificates and Share Certificates.	
1921—July 30th	..	Payment—47½ per cent.— Priority Wool Certificates	£4,487,899
		Cash retirement of small interests and fractional payments	£206,536
1922—May 18th	..	Payment—52½ per cent.— Final payment of Priority Wool Certificates	£4,960,310
1923—April 14th	..	First capital reduction— Payment 10s. per share	£5,651,495
1923—May 1st	..	Last bale of wool shipped from Australia.	
1924—February 12th	..	Second capital reduction— Payment 9s. per share	£5,086,345
1924—May 2nd	..	Last bale of wool sold in England.	
1927—November 15th	..	Final capital payment— 1s. per share	£565,149
			£20,957,734
			£199,810,325
1927—November 15th	..	First liquidation payment— 12s. 6d. per share	7,064,368
			£206,874,693

15. United Kingdom Importation of Wool.—The appended statement of the quantity and value of wool imported into the United Kingdom during the year 1927 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, 1927.

Country from which imported.	Quantity.	Value.	Country from which imported.	Quantity.	Value.
	lbs.	£		lbs.	£
Australia ..	237,809,500	19,025,464	United States of America ..	3,996,100	317,073
New Zealand ..	192,427,800	14,107,735	Peru ..	3,707,000	239,629
Union of South Africa ..	158,978,200	12,107,409	Belgium ..	3,678,100	413,290
Argentine. Re-public ..	72,076,500	3,865,547	Falkland Islands ..	3,544,700	221,949
India ..	55,071,600	2,951,892	Other British Possessions ..	3,971,700	249,661
Chile ..	27,572,600	1,806,727	Germany ..	1,922,800	186,544
France ..	21,731,800	2,317,727	Other Countries	8,893,900	578,306
Uruguay ..	17,374,100	1,187,328			
Irish Free State	11,933,000	667,026			
			Total ..	824,689,400	60,243,307

(a) Greasy, Scoured, and Tops.

Of the importations of wool into the United Kingdom, Australian wool represented 29 per cent. of quantity and 32 per cent. of value, and New Zealand 23 per cent. of quantity and 23 per cent. of value. It is interesting to note that 663,736,500 lbs., valued at £49,331,136, were received from British Possessions, being 80 per cent. of the total weight and 82 per cent. of the total value imported.

§ 6. Trade in Hides and Skins.

1. Extent of Trade.—In addition to the hides and skins treated in the tanneries of the several States, a very considerable export trade is carried on, the value of Australian cattle and horse hides and sheep and other skins exported during the five years 1923–24 to 1927–28 amounting to £41,670,187, or an average of £8,334,037 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 £18,262,828. France was the largest purchaser, taking 52.5 per cent. of the total consignments, while United Kingdom ranked next with 31.5 per cent., and the remaining 16 per cent. was shipped principally to the United States of America, Belgium, and Germany. The exports of sheepskins with wool during each of the years from 1923–24 to 1927–28 were as follows :—

SHEEPSKINS WITH WOOL.—EXPORTS, AUSTRALIA, 1923–24 TO 1927–28.

Particulars.	1923–24.	1924–25.	1925–26.	1926–27.	1927–28.	Total for 5 years.
Sheepskins (with wool) .. No.	7,063,988	6,245,268	8,585,054	9,152,287	10,829,913	41,876,510
Value .. £	3,111,128	3,821,837	3,509,328	3,409,833	4,410,702	18,262,828

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 98 per cent. of the exports during the past five years, the purchases of the United States of America alone amounting to 64 per cent. of the total shipments. Particulars concerning exports are as follows :—

SHEEPSKINS WITHOUT WOOL.—EXPORTS, AUSTRALIA, 1923-24 TO 1927-28.

Particulars.	1923-24.	1924-25.	1925-26.	1926-27.	1927-28.	Total for 5 years.
Sheepskins (with- out wool) .. No.	599,866	64,425	89,860	217,102	553,170	1,524,423
Value £	50,655	7,139	13,858	30,228	42,447	144,327

4. **Hides.**—(i) *Exports.* The export trade in Australian cattle hides, which fell away during the war years, has again become important. Considerable quantities were shipped oversea during each of the last five years mainly to the United Kingdom, which took 23 per cent. of the total shipments during that period, followed by Italy 19 per cent., United States of America and Germany 16 per cent., and Belgium 4 per cent.

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

CATTLE HIDES.—EXPORTS, AUSTRALIA, 1923-24 TO 1927-28.

Particulars.	1923-24.	1924-25.	1925-26.	1926-27.	1927-28.	Total for 5 years.
Cattle Hides .. No.	924,092	1,167,938	916,956	889,746	1,003,220	4,901,952
Value £	817,719	1,322,088	1,105,540	998,981	1,690,908	5,935,236

Calfskins exported during the years 1923-24 to 1927-28 numbered 1,218,681, valued at £357,546, and were shipped mainly to the United States of America, the value of the skins taken by that country averaging 57 per cent. of the total exports during the past five years. The annual export of horse hides is very small, and averaged only 4,443 hides, valued at £3,436.

(ii) *Imports.* The import trade in cattle hides and calfskins is fairly considerable, the number annually imported on the average during the past five years amounting to 422,193. 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 1923-24 to 1927-28 were as follows :—

CATTLE HIDES.—IMPORTS, AUSTRALIA, 1923-24 TO 1927-28.

Particulars.	1923-24.	1924-25.	1925-26.	1926-27.	1927-28.	Total for 5 years.
Cattle Hides .. No.	480,265	456,589	474,342	371,868	327,903	2,110,967
Value £	533,539	494,501	462,066	437,932	419,345	2,347,383

The number of horse hides imported into Australia is unimportant. Imports during the last five years numbered 12,787, valued at £13,458.

5. **Other Skins.**—The oversea exports of skins other than those mentioned in the preceding sub-sections are of considerable importance. During the past five years the value of these shipments amounted to £16,485,194, or an annual average of £3,297,039. Rabbit and-hare skins contributed most largely to this total, followed by opossum and kangaroo skins. The individual exports from 1923-24 to 1927-28 were as follows:—

OTHER SKINS.—EXPORTS, AUSTRALIA, 1923-24 TO 1927-28.

Particulars:	1923-24.	1924-25.	1925-26.	1926-27.	1927-28.	Total for 5 years.
	£	£	£	£	£	£
Rabbit and Hare	1,349,978	2,492,438	2,880,360	2,837,663	2,492,522	12,052,961
Opossum ..	410,660	127,774	362,406	921,833	540,735	2,363,408
Kangaroo ..	290,809	182,009	154,476	137,994	200,781	966,069
Fox ..	137,733	62,988	112,986	103,683	140,301	557,691
Wallaby ..	57,306	55,653	74,464	46,655	42,184	276,262
Other ..	4,086	10,912	13,320	26,400	214,085	268,803
Total ..	2,250,572	2,931,774	3,598,012	4,074,228	3,630,608	16,485,194

The destination of these skins was practically confined to the United States of America and the United Kingdom, the former country taking the bulk of the rabbit, hare, and kangaroo skins, while the fox, opossum, and wallaby skins were mainly dispatched to the United Kingdom. The shipments of the various skins to these two countries during the past five years were as follows:—

OTHER SKINS.—EXPORTS TO UNITED STATES AND UNITED KINGDOM, 1923-24 TO 1927-28.

Particulars.	United Kingdom.	United States of America.
	£	£
Rabbit and Hare	3,603,337	7,723,189
Opossum	1,421,566	1,027,403
Kangaroo	161,244	798,003
Fox	429,852	90,410
Wallaby	248,593	22,911
Other	53,189	193,015
Total	5,917,781	9,854,931