

CHAPTER XIX. PASTORAL PRODUCTION.

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

§ 1. Initiation and Growth of Pastoral Industry.

1. **General.**—A detailed account of the various enumerations of live stock in Australia made prior to 1860 is given in previous issues of the Year Book. The numbers recorded between 1800 and 1860 are regarded as somewhat defective. Doubtless the growth of population, the expansion in the area settled and the increase in private ownership made it difficult in those early times to secure accurate returns. Since 1860 however, the annual enumerations have been based, with few exceptions, on actual collections made through the agency of the State Police or by post and reliably record the movement in live stock numbers from year to year.

2. **Live Stock Numbers since 1860.**—Particulars concerning the numbers of each of the principal kinds of live stock in Australia at decennial intervals from 1860 to 1930 and from 1939 onwards in single years are given in the following table, and are shown continuously on the graph on page 809.

During the ninety-two years from 1860 to 1952 the live stock of Australia increased considerably, viz. :—Horses, 117 per cent. ; cattle, 276 per cent. ; sheep, 484 per cent. ; and pigs, 191 per cent. The average annual increases which these aggregates represent are as follows :—Horses, 0.84 per cent. ; cattle, 1.45 per cent. ; sheep, 1.94 per cent. ; and pigs, 1.17 per cent.

LIVE STOCK : AUSTRALIA. (‘000.)

Year.	Horses.	Cattle.	Sheep.	Pigs.
1860	432	3,958	20,135	351
1870	717	4,276	41,594	543
1880	1,069	7,527	62,184	816
1890	1,522	10,300	97,881	891
1900	1,610	8,640	70,603	950
1910	2,166	11,745	98,066	1,026
1920	2,416	13,500	81,796	764
1930	1,793	11,721	110,568	1,072
1939	1,724	12,862	111,058	1,156
1940	1,699	13,080	119,305	1,455
1941	1,666	13,256	122,694	1,797
1942	1,611	13,561	125,189	1,415
1943 (31st March)	1,518	14,005	124,615	1,563
1944 " "	1,449	14,184	123,174	1,747
1945 " "	1,359	14,133	105,371	1,631
1946 " "	1,265	13,878	96,396	1,426
1947 " "	1,195	13,427	95,723	1,273
1948 " "	1,165	13,785	102,559	1,255
1949 " "	1,115	14,124	108,735	1,196
1950 " "	1,057	14,640	112,891	1,123
1951 " "	999	15,229	115,596	1,134
1952 " "	937	14,893	117,647	1,022

3. **Fluctuations.**—The increases referred to, however, have not been continuous, marked fluctuations having taken place during the period, mainly on account of droughts which have from time to time left their impress on the pastoral history of Australia. These occurred in 1868, 1877, 1883-4, 1892, 1893, 1895, 1901-2, 1912, 1914, 1918, 1919, 1922-23, 1925-26, 1927-28, 1929-30, 1940-41 and 1944-45 to 1946-47.

The years in which the numbers of live stock attained their maxima are as follows :—Horses, 1918 (2,527,000); cattle, 1951 (15,229,000); sheep, 1942 (125,189,000); and pigs, 1941 (1,797,000).

The distribution throughout Australia of beef cattle, dairy cattle, sheep and pigs as at 31st March, 1948 is shown in the graphs on pages 905-8 of Official Year Book No. 39.

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

4. **Minor Classes of Live Stock.**—Statistics of the minor classes of live stock (goats, camels, mules, donkeys, etc.) have not been collected in recent years. The last year in which all States, other than Victoria, collected this information was 1941, when total numbers were as follows :—Goats, 80,366; camels, 2,267; and mules and donkeys, 10,881. Of these, goats were most numerous in Queensland, and camels, mules and donkeys in Western Australia. In the raising of goats, some attention has been devoted to the angora goat and its product (mohair), and upwards of 5,000 angora goats are included in the number shown above. Of these, 1,640 were in New South Wales, 1,000 in Queensland, 1,531 in South Australia, and 284 in Tasmania.

New South Wales ceased collecting these details after 1941 and other States after 1942.

5. **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 1938-39 and 1948-49 to 1951-52 were as follows :—

NET EXPORTS OF PASTORAL PRODUCTS : AUSTRALIA.

Product.	Unit of Quantity.	1938-39.	1948-49.	1949-50.	1950-51.	1951-52.
Animals (living)—						
Cattle	No.	405	940	325	675	363
Horses	"	2,294	594	750	512	283
Sheep	"	66,739	83,975	96,335	83,696	78,877
Bones	ewt.	21,497	45,032	27,908	32,556	26,447
Glue-pieces and Sinews	"	11,145	4,357	15,650	20,882	18,505
Glycerine	lb.	78,727	165,190	312,401	2,266,589	1,754,420
Hair and Bristles	"	1,003,366	8,779	13,094	16,856	12,576
Hoofs	ewt.	(a)	14,643	9,397	9,177	10,095
Horns	"	(a)	7,412	7,862	8,723	7,220
Meats—						
Frozen Beef and Veal (b)	lb.	271,948,548	191,648,948	182,361,271	158,309,727	95,875,957
" Mutton and Lamb	"	186,487,551	114,863,908	193,091,750	54,108,422	31,109,668
" Rabbits and Hares	Pair	(a)	24,530,331	21,859,322	9,905,182	16,666,684
" Other	lb.	19,583,368	28,362,199	30,083,284	24,501,305	20,504,981
Potted and Concentrated	"	(a)	1,322,815	930,326	1,403,463	1,033,212
Preserved in Tins, etc.	"	14,778,896	128,820,550	95,580,754	95,655,072	112,177,224
Other (excluding Bacon and Ham)	"	368,448	4,603,391	4,671,570	3,066,731	3,479,278
Sausage Casings	ewt.	8,673	2,524	17,875	2,212	5,220
Skins—						
Cattle	No.	(a)	228,532	237,207	178,861	113,816
Calf	"	(a)	12,973	14,789	14,410	44,124
Horse	"	(a)	43,482	47,923	51,381	59,615
Sheep and Lamb	"	(a)	11,969,742	18,302,781	13,150,437	11,935,629
Rabbit and Hare	ewt.	37,544	87,441	93,769	122,620	57,660
Other (including Undressed Furs)	No.	(a)	777,932	6,717	13,954	19,187
Tallow (Edible and Inedible)	ewt.	(c) 560,241	173,225	407,723	278,218	144,975
Wool—						
Greasy	lb.	779,781,662	976,032,759	1,052,755,607	905,302,218	820,198,267
Scoured. Tops, Noils, Waste	"	70,299,595	155,688,040	161,977,028	126,821,384	97,164,797

(a) Quantity not available. (b) Includes chilled beef. (c) Inedible tallow only.

NOTE.—Minus sign (—) signifies net imports.

The values of the net exports for the same five years are furnished in the next table. For the four years ended 1951-52 they amounted to £1,672,272,831, or an average of £418,068,208 per annum, of which wool represented 89.5 per cent. Meat, skins and tallow comprise the remaining principal pastoral products exported. Net exports in 1938-39 were valued at £56,290,910, of which wool represented 74.56 per cent.

VALUE OF NET EXPORTS OF PASTORAL PRODUCTS: AUSTRALIA.

(£.)

Product.	1938-39.	1948-49.	1949-50.	1950-51.	1951-52.
Animals (living)—					
Cattle	989	27,845	48,675	52,931	156,395
Horses	14	219,246	179,304	153,020	123,764
Sheep	43,443	195,742	235,152	331,920	355,481
Bones	10,909	58,260	33,004	42,893	58,895
Glue-pieces and Sinews	7,087	10,820	40,161	63,731	65,944
Glycerine	1,307	14,733	17,059	204,583	292,530
Hair and Bristles	7,280	480,928	511,089	659,140	1,191,756
Hoofs	8,027	22,892	10,589	15,221	24,363
Horns	18,633	19,774	20,999	25,170	47,879
Meats—					
Frozen Beef and Veal (a)	4,323,275	5,815,421	6,704,651	6,647,854	5,229,844
" Mutton and Lamb	4,807,423	4,222,173	7,452,668	2,664,134	1,914,722
" Rabbits and Hares	232,034	4,152,258	3,986,639	2,734,659	4,500,273
" Other	419,269	1,055,289	1,308,003	1,128,904	1,148,150
Potted and Concentrated	28,025	545,467	309,168	439,790	285,949
Preserved in Tins, etc.	493,489	8,110,397	7,542,565	9,166,589	13,101,043
Other (excluding Bacon and Ham)	6,355	342,943	336,021	294,901	312,819
Sausage Casings	209,280	213,396	970,689	736,171	533,201
Skins—					
Cattle	662,203	1,104,468	1,282,936	1,288,105	809,808
Calf	131,227	48	17,353	21,133	51,993
Horse	7,202	123,280	135,281	242,382	280,486
Sheep and Lamb	2,339,703	7,401,022	11,683,123	22,025,628	13,606,425
Rabbit and Hare	396,830	2,992,027	1,628,203	2,962,581	1,333,392
Other (including Undressed Furs)	226,376	49,203	18,314	34,046	50,298
Tallow (Edible and Inedible)	(b) 480,744	1,141,738	1,868,237	1,420,520	888,925
Wool—					
Greasy	36,688,235	194,747,606	264,245,994	547,983,642	277,315,218
Scoured, Tops, Noils, Waste	5,281,729	35,825,848	47,868,193	84,159,255	44,705,476
Total Values	56,290,910	267,287,274	356,920,984	683,544,904	364,519,669

(a) Includes chilled beef. (b) Inedible tallow only.

NOTE.—The minus sign (—) signifies net imports.

6. Value of Pastoral Production.—(i) *Gross, Local and Net Values, 1950-51 and 1951-52.* Values of pastoral production for each State are shown for 1950-51 and 1951-52 in the following table. Fuller details of the source of the information and an explanation of the terms used in this compilation will be found in Chapter XXIX.—Miscellaneous. Maintenance costs have not been computed in all States and depreciation has not been deducted; consequently the net values are inflated to the extent of these costs.

**GROSS, LOCAL AND NET VALUES OF PASTORAL PRODUCTION, 1950-51 AND
1951-52.
(£'000.)**

State.	Gross Production Valued at Principal Markets.	Marketing Costs.	Gross Production Valued at Farm.	Farm Costs.		Net Value of Production. (a)
				Seed used, and Fodder for Farm Stock.	Value of other Materials used in Process of Production.	
1950-51.						
New South Wales ..	315,549	10,315	305,234	1,796	(b) 796	302,642
Victoria ..	171,834	6,375	165,459	845	2,205	162,409
Queensland ..	117,216	10,930	106,286	4,120	1,640	100,526
South Australia ..	69,947	2,753	67,194	725	672	65,797
Western Aust. ..	65,961	2,341	63,620	797	1,360	61,463
Tasmania ..	14,743	511	14,232	2,096	(b) 164	11,972
Total ..	755,250	33,225	722,025	10,379	6,837	704,809

1951-52.						
New South Wales ..	168,479	9,832	158,647	2,854	(b) 1,407	154,386
Victoria ..	110,830	6,960	103,870	1,118	2,944	99,808
Queensland ..	78,230	7,300	70,930	2,750	1,100	67,080
South Australia ..	43,017	2,667	40,350	876	509	38,965
Western Aust. ..	39,977	2,242	37,735	1,273	2,020	34,442
Tasmania ..	9,287	525	8,762	2,722	(b) 228	5,812
Total ..	(c)449,820	29,526	420,294	11,593	8,208	400,493

(a) No deduction has been made for depreciation and maintenance. (b) No allowances made for costs of power, power kerosene, petrol and other oils. (c) Excludes £23,662,342 comprising an interim distribution of profits under the Wool Disposals Plan.

(ii) *Net Values*, 1934-35 to 1951-52. The net value of pastoral production by States and the net value per head of population for the years 1947-48 to 1951-52 together with the average for the years 1934-35 to 1938-39 are shown below.

NET VALUE OF PASTORAL PRODUCTION.

Year.	N.S.W. (b)	Vic.	Q'land.	S. Aust.	W. Aust.	Tas. (b)	Total.
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NET VALUE.(a)

(£'000.)

Average, 1934-35 to 1938-39 ..	30,592	16,784	13,384	4,583	4,307	1,429	71,079
1947-48 ..	73,757	42,753	39,312	16,930	16,815	4,303	193,870
1948-49 ..	95,640	53,714	43,869	21,456	20,802	5,374	240,855
1949-50 ..	140,027	77,629	57,327	28,558	26,442	7,138	337,121
1950-51 ..	302,642	162,409	100,526	65,797	61,463	11,972	704,809
1951-52 ..	154,386	99,808	67,080	38,965	34,442	5,812	400,493

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

NET VALUE OF PASTORAL PRODUCTION—*continued.*

Year.	N.S.W.	Vic.	Q'land.	S. Aust.	W. Aust.	Tas.	Total.
NET VALUE PER HEAD OF POPULATION.(a)							
(£ s. d.)							
Average, 1934-35 to 1938-39	11 8 0	9 1 3	13 11 10	7 15 6	9 9 2	6 2 7	10 8 8
1947-48 ..	24 10 8	20 13 3	35 6 7	25 19 1	33 0 11	16 8 9	25 9 5
1948-49 ..	31 4 3	25 8 4	38 13 3	32 5 2	39 16 9	20 0 8	31 0 2
1949-50 ..	44 2 11	35 15 4	49 5 9	41 11 7	48 8 11	25 14 8	41 17 7
1950-51 ..	92 8 9	72 12 2	84 5 5	92 10 10	107 11 6	41 12 7	85 3 9
1951-52 ..	46 0 1	43 7 4	54 18 8	53 8 6	58 5 3	19 9 4	47 2 7

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

7. **Consumption of Meats.**—Particulars of the quantity of meat per head per annum available for civilian consumption in Australia, Canada, the United Kingdom and the United States are given in the following table. Canned and cured meat has been included at its carcass weight equivalent.

The sources of the figures for Canada, the United Kingdom, and the United States of America are *Food Balance Sheets* published by the Food and Agricultural Organization of the United Nations for the years 1949-50 to 1951-52 and *Food Consumption Levels in the United States of America, Canada and the United Kingdom* (Third Report (1946) of a Special Joint Committee set up by the Combined Food Board for the pre-war periods).

The demand for meat during the war years was such as to necessitate the introduction of rationing in order to divert supplies from civilian consumption to the armed services. The rationing of meat (other than bacon and ham, canned meat, sausages and offal) was in operation in Australia from 17th January, 1944 to 21st June, 1948. Details of the ration rates in force over this period are shown in Official Year Book No. 37, p. 858.

QUANTITY OF MEAT (INCLUDING CURED AND CANNED) AND EDIBLE OFFAL AVAILABLE FOR CIVILIAN CONSUMPTION PER HEAD PER ANNUM.

(lb.—in terms of Carcass Weight.)

Country.	Average, Pre-war.	1949-50.	1950-51.	1951-52.
Australia	(a) 253.0	232.9	226.6	216.5
Canada	(b) 118.4	134.5	131.8	119.9
United Kingdom	(c) 131.7	(d)	(d)	(d)
United States of America	(b) 134.1	(e) 143.5	(e) 137.7	(e) 140.0

(a) Average for years 1936-37 to 1938-39. (b) Average for years 1935 to 1939. (c) Average for years 1934 to 1938. (d) Comparable figures not yet available. (e) Year ended December following. These figures exclude offal, which in 1948-49 amounted to 10.1 lb. edible weight.

8. **Marketing of Meat.**—(i) *General.* The Meat Export Control Act 1935-1953 was introduced following a decision of a conference of Commonwealth and State Ministers with members of the Commonwealth Meat Advisory Committee, held in October, 1935, to set up a Meat Board with defined statutory powers. The Australian Meat Board, which was appointed under the Act in January, 1936, consisted of eighteen members, representative of producers, processors, exporters and the Commonwealth Government. Provision was made for the appointment from within the Board of an Executive Committee and a Beef Committee. The Act provided for the control of the export of meat by licence. The Board was empowered to regulate shipments of meat and to arrange contracts in respect of freights and insurances; to promote overseas sales by advertising and to foster research into meat problems; and to supervise the issue of export licences. The Board also has power to appoint a London representative.

During the 1939-45 War the control of meat exports was under National Security Regulations which ceased to operate with the expiry of the National Security Act on 31st December, 1946. Control then reverted to the Board, which was reconstituted in August, 1946 by legislation amending the Meat Export Control Act. Membership of the reconstituted Board is on an industry basis in lieu of a State basis and the number of members has been reduced from eighteen to twelve. The powers and functions of the Board were *inter alia* extended to enable it to purchase and sell any meat, meat products or edible offal on behalf of the Commonwealth Government and subject to any direction of the Minister for Commerce and Agriculture.

The Meat Export Charges Act 1935-1946 provides for the imposition of a levy on all meats exported from Australia, the funds from which are used for the purpose of defraying expenses and charges incurred by the Australian Meat Board in the course of its business. The customary provision is made for exemption from the levy when recommended by the Board.

(ii) *War-time Marketing.* Details of arrangements for the marketing of meat during the 1939-45 War are given on page 1107 of Official Year Book No. 36.

(iii) *United Kingdom Long-term Purchase Agreements.* Details of the long-term meat contracts with the United Kingdom Government from the outbreak of the 1939-45 War up to 30th September, 1950, were given on page 903 of Official Year Book No. 38, and page 1107 of Official Year Book No. 36.

After the termination of the long-term contract on 30th September, 1950, annual arrangements were entered into for the sale of Australia's exportable surplus of meat to the United Kingdom up to 30th June, 1952.

In October, 1951, representatives of the United Kingdom and Australian Governments signed the Fifteen-year Meat Agreement in London which covers the period from 1st July, 1952 to 30th September, 1967. The classes of meat included in the Agreement are chilled and frozen beef, frozen veal, frozen mutton and lamb, frozen cattle and sheep sundries and edible offals. The principal objectives of the Agreement are to promote the production of meat in Australia, enabling increased exports to be made to the United Kingdom and providing for a satisfactory market for Australian meat in the United Kingdom for the period of the Agreement.

The first detailed Agreement for beef and veal covers the period of six years ending 30th September, 1958, and for mutton and lamb for three years ending 30th June, 1955. In both cases, 1950-51 prices are the basic level. The prices which were agreed for the meat year 1952-53 represented substantial increases on those previously ruling.

The following table sets out the prices of representative descriptions of Australian beef and lamb which have been sold to the United Kingdom on a Government-to-Government basis since the beginning of the 1939-45 War.

CONTRACT PRICES: BEEF AND LAMB SOLD TO UNITED KINGDOM.

Beef.			Lamb.		
Contract approved from—	First Quality Ox Sides.		Contract approved from—	First Quality. (37-42 lb.)	
	Per lb. Sterling.	Per lb. Australian.		Per lb. Sterling.	Per lb. Australian.
	<i>d.</i>	<i>d.</i>		<i>d.</i>	<i>d.</i>
October, 1939..	3.406	4.266	October, 1939 ..	5.438	6.811
„ 1941..	3.781	4.736	„ 1941 ..	5.813	7.281
December, 1943..	3.969	4.971	„ 1944 ..	6.250	7.828
January, 1946..	4.344	5.441	„ 1946 ..	7.790	9.757
October 1946..	4.844	6.067	„ 1948 ..	8.667	10.855
April, 1948..	5.344	6.693	July, 1949 ..	9.688	12.134
October, 1948..	6.063	7.594	„ 1950 ..	10.438	13.074
„ 1949..	7.063	8.846	„ 1951 ..	12.26	15.33
„ 1950..	7.906	9.902	„ 1952 ..	14.30	17.87
„ 1951..	10.00	13.63			
„ 1952..	13.08	16.35			

Provision was also made in the Agreement for reservation of quantities of meat for sale to other markets. This is 3 per cent. of the quantity shipped to the United Kingdom, or such other amount as may be agreed annually between the two Governments. The quantity for 1952-53 was 5,000 tons.

Pig meats were not included in the Agreement, but a two-year arrangement terminating on 30th September, 1954 was negotiated. This arrangement did not limit shipments of pig meats to other markets.

§ 2. Horses.

1. *Distribution throughout Australia.*—The States of New South Wales, Queensland and Victoria together depasture about 80 per cent. of the total number of horses in Australia. In the following table figures are shown for each State and Territory for the years 1948 to 1952 in comparison with the average for the years 1935 to 1939 :—

HORSES : NUMBER.

('000.)

Year.	N.S.W.	Vic.	Q'land.	S. Aust.	W. Aust.	Tas.	N.T.	A.C.T.	Total.
Average, 1935 to 1939 ..	537	355	444	198	154	31	33	I	1,753
1948 ..	376	221	336	101	75	23	32	I	1,165
1949 ..	358	213	325	94	69	22	33	I	1,115
1950 ..	343	200	317	83	59	21	33	I	1,057
1951 ..	329	187	307	71	55	20	29	I	999
1952 ..	311	169	289	63	53	19	32	I	937

The number of horses in Australia attained its maximum during 1918, when a total of 2,527,149 was recorded. The United States of America made its highest recording in the same year and Canada in 1921. The number in Australia has declined considerably since 1918 owing to the mechanization of transport and farming. During the period 1918 to 1952 the decrease in numbers averaged 47,000 per annum, the rate of decline being 53,000 per annum during the five years ended 1952.

The number of horses in Australia from 1860 onwards may be obtained from the graph on page 809.

The percentages of the number of horses in the several States and Territories of the total for Australia for 1952 were:—New South Wales, 33.1; Victoria, 18.1; Queensland, 30.8; South Australia, 6.7; Western Australia, 5.7; Tasmania, 2.0; Northern Territory, 3.5; and Australian Capital Territory, 0.1 per cent.

2. *Oversea Trade in Horses.*—(i) *Exports.* The export of horses from Australia during the early years of this century was fairly considerable, averaging about 15,000 head per annum between 1901 and 1920, exclusive of those used for war purposes during the 1914-18 War. Since then, exports have gradually declined and averaged only about 4,000 for the five years ended 1938-39 and 950 for the five years ended 1951-52.

(ii) *Imports.* The few horses imported into Australia consist mainly of valuable stud animals from the United Kingdom and racehorses from New Zealand. The average value per head of the horses imported during the five years 1947-48 to 1951-52 was £829. The average number imported per annum during this period was 406 and the average annual value, £336,579.

Details of the quantity and value of imports, exports and net exports of horses are shown in the following table for the years 1947-48 to 1951-52 compared with the average for the five years ended 1938-39.

HORSES : IMPORTS AND EXPORTS, AUSTRALIA.

Year.	Imports.		Exports.		Net Exports.	
	No.	Value.	No.	Value.	No.	Value.
Average, 1934-		£		£		£
35 to 1938-39	321	135,459	4,005	139,012	3,684	3,553
1947-48 ..	341	303,240	920	236,477	579	— 66,763
1948-49 ..	424	361,061	1,018	141,815	594	— 219,246
1949-50 ..	469	352,600	1,219	173,296	750	— 179,304
1950-51 ..	333	305,399	845	152,379	512	— 153,020
1951-52 ..	462	360,596	745	236,832	283	— 123,764

NOTE.—The minus sign (—) signifies net imports.

§ 3. Cattle.

1. **Purposes for which Raised.**—Cattle-raising is carried out in all the States, the main object in certain districts being the production of stock suitable for slaughtering purposes, and in others the raising of profitable dairy herds. The great impetus which the development of the export trade in Australian butter gave to the dairying industry led to a considerable increase in numbers and an improvement in quality of the dairy herds in 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, beef-producing cattle are mainly raised in the tropical districts, i.e., in the northern parts of Queensland, in the Northern Territory, and in the Kimberley district in the north of Western Australia.

2. **Distribution throughout Australia.**—Until 1880, New South Wales was the principal cattle-raising State, but in that year Queensland occupied the leading position, which it has since maintained. There was a very rapid increase in the number of cattle in Australia up to the year 1894, when 12,312,000 head were depastured. From 1895 onwards, however, the effects of droughts and the ravages of tick fever reduced the number to 7,063,000 in 1902. Following the disastrous drought which terminated in the latter year the herds were gradually built up, and, despite recurring droughts, they continued to increase until the maximum number of 14,441,000 cattle was attained in 1921. After that year the number dropped continuously till 1929, largely owing to the decline in the overseas demand for frozen beef. With the expansion of dairying it recovered to 14,049,000 in 1934, but from that year declined continuously to 1939 when it stood at 12,862,000. The upward movement which commenced in 1940 was continued until 1944, the total number of cattle (14,184,000) in the latter year being at its highest level since 1923. Drought conditions and other factors during 1944-45 and 1945-46 caused a decline in numbers to 14,133,000 in 1945, to 13,878,000 in 1946 and to 13,427,000 in 1947. This was followed by an upward movement in numbers to 15,229,000 in 1951, the highest number yet recorded. In 1952 numbers declined to 14,893,000, the reduction being confined mainly to dairy cattle in the Eastern States. A graph showing the number of cattle in Australia from 1860 appears on page 809.

The numbers of cattle (beef and dairy) in the several States and Territories in each year 1948 to 1952 compared with the average for the years 1935 to 1939 are shown below.

CATTLE : NUMBER.

('000.)

Year.	N.S.W.	Vic.	Q'land.	S. Aust.	W. Aust.	Tas.	Nor. Terr.	Aust. Cap. Terr.	Total.
Average, 1935 to 1939 ..	3,198	1,952	6,018	331	819	262	889	9	13,478
1948 ..	3,130	2,174	5,976	445	816	244	991	9	13,785
1949 ..	3,253	2,225	5,992	461	864	266	1,053	10	14,124
1950 ..	3,440	2,231	6,305	464	865	275	1,049	11	14,640
1951 ..	3,703	2,216	6,734	433	841	272	1,019	11	15,229
1952 ..	3,621	2,215	6,434	437	852	266	1,058	10	14,893

Although the proportion is not as high as it has been in the past, Queensland was carrying 43.2 per cent. of the cattle in Australia in 1952. The percentage in each State and Territory during that year was:—New South Wales, 24.3; Victoria, 14.9; Queensland, 43.2; South Australia, 2.9; Western Australia, 5.7; Tasmania, 1.8; Northern Territory, 7.1; Australian Capital Territory, 0.1.

Graphs indicating the distribution of beef and dairy cattle separately in Australia at 31st March, 1948 are shown on pages 905-6 of Official Year Book No. 39. A graph showing the distribution in 1924-25 of the total cattle in Australia appeared on page 660 of Official Year Book No. 22, while in Official Year Book No. 34 similar graphs showing for 1938-39 the distribution of total cattle and of dairy cows may be found on pp. 453-4.

3. **Classification of Cattle According to Purpose.**—Of the total number of cattle in Australia in 1952, 10,327,000 or 69.3 per cent. were classified as beef cattle. The numbers classified as beef cattle in the several States and Territories during the years 1943 and 1948 to 1952 were as follows:—

BEEF CATTLE : NUMBER.
(‘000.)

Year.	N.S.W.	Vic.	Q'land.	S. Aust.	W. Aust.	Tas.	Nor. Terr.	Aust. Cap. Terr.	Total.
1943	1,676	577	4,893	171	605	102	978	5	9,007
1948	1,890	698	4,593	170	590	100	991	6	9,038
1949	1,994	711	4,569	182	634	111	1,053	7	9,261
1950	2,167	706	4,872	193	638	117	1,049	8	9,759
1951	2,457	727	5,293	189	618	115	1,019	8	10,426
1952	2,416	776	5,138	201	621	110	1,058	7	10,327

A classification of numbers on this basis is not available prior to 1943.

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

4. **Size Classifications of Cattle Herds.**—A special series of tabulations relating to rural holdings in Australia was compiled for 1949-50 and published in Primary Industries Bulletin No. 44. The tables relating to beef and dairy cattle show classifications according to size of herd and area of the holdings.

5. **Comparison with other Countries.**—The following table shows the number of cattle in Australia and in some of the principal cattle-raising countries of the world for the years 1936-40 and at the latest available date. The figures, which have been compiled by the Food and Agriculture Organization of the United Nations, relate generally to areas embraced by post-war boundaries, but do not cover identical areas for the two periods in all cases.

CATTLE : NUMBER IN VARIOUS COUNTRIES.
(‘000.)

Country.	Average, 1936-40. (a)	Year and Month.	Number.
India	(b) 137,974	1952 (May) ..	150,298
United States of America	66,684	1952 (January) ..	88,062
Brazil	40,807	1950 (December) ..	(c) 52,655
U.S.S.R. (Russia)	48,500	1946	(c) 41,500
Argentina	33,762	1947 (June) ..	41,268
Pakistan	(b) 24,444	1949-50	24,296
Ethiopia	(e) 18,000	1951-52	19,000
China, Proper	(d) 23,081	1948 (April) ..	18,200
France	15,504	1951 (October) ..	16,235
Colombia	8,010	1950 (December) ..	15,512
Australia	13,285	1952 (March) ..	14,893
Mexico	11,722	1949 (December) ..	(c) 14,500
Germany	19,881	1949 (December) ..	14,202
Union of South Africa	11,636	1950 (August) ..	11,513
Turkey	7,177	1951 (December) ..	10,396

(a) Average for two to four years in some cases.
(e) 1938.

(b) 1939.

(c) Unofficial estimate.

(d) 1937.

6. **Imports and Exports of Cattle.**—The products of the cattle-raising industry figure largely in the export trade of Australia, although the export of live cattle has never been large. The number of cattle imported is also small, consisting, as in the case of horses, mainly of valuable animals for stud purposes. Details for the years 1947-48 to 1951-52 compared with the average for the years 1934-35 to 1938-39 are as follows :—

CATTLE : IMPORTS AND EXPORTS, AUSTRALIA.

Year.	Imports.		Exports.		Net Exports.	
	No.	Value.	No.	Value.	No.	Value.
Average, 1934-35 to 1938-39	295	£ 22,304	308	£ 5,977	13	— 16,327
1947-48 ..	103	29,934	4,359	74,141	4,256	— 44,207
1948-49 ..	147	75,553	1,087	47,708	940	— 27,845
1949-50 ..	160	88,831	485	40,156	325	— 48,675
1950-51 ..	201	122,936	876	70,005	675	— 52,931
1951-52 ..	318	214,441	681	58,046	363	— 156,395

NOTE.—The minus sign (—) signifies net imports.

The average value per head of the cattle imported during the last five years was £572, while the average value per head of the cattle exported during the same period was £39.

7. **Cattle Slaughtered.**—The numbers of cattle slaughtered during each of the years ended June, 1948 to 1952 compared with the average for the years 1934-35 to 1938-39 are shown in the following table :—

CATTLE (INCLUDING CALVES) SLAUGHTERED.
(’000.)

Year ended June—	Slaughtering passed for Human Consumption.									Total Slaughtering including Boiled Down.
	N.S.W.	Vic.	Qld.	S.A.	W.A.	Tas.	N.T.	A.C.T.	Total.	
Average, 1935 to 1939 ..	1,112	812	1,046	(b) 156	(b) 124	45	(b) 4	2	3,301	3,331
1948 ..	1,076	748	1,188	165	145	38	15	3	3,378	3,411
1949 ..	1,136	850	1,089	195	159	45	15	5	3,494	3,523
1950 ..	1,156	893	1,102	213	166	58	14	6	3,608	3,648
1951 ..	1,160	915	1,181	226	160	70	15	8	3,735	3,794
1952 ..	1,247	966	1,029	197	152	71	15	9	3,686	3,738

(a) Year ended March.

(b) Year ended previous December.

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

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

Year ended June—	N.S.W.	Victoria.	Q’land.	S. Aust.	W. Aust.	Tas.	N. Terr.	A.C.T.	Total.
Average, 1935 to 1939	(a) 173	115	181	(b) 25	(b) 27	9	(b) 1	..	531
1948	162	105	226	27	30	8	3	1	562
1949	180	118	202	30	33	10	3	1	577
1950	186	125	212	33	35	12	3	1	607
1951	193	137	232	36	34	14	4	2	652
1952	184	138	178	31	32	14	3	2	582

(a) Year ended March.

(b) Year ended previous December.

9. **Consumption of Beef and Veal.**—For the three pre-war years 1936–37 to 1938–39 the average annual production of beef and veal in Australia was 569,000 tons of which 127,000 tons were exported, leaving a balance of 442,000 tons (or the carcass equivalent of 144 lb. per head per annum) available for consumption as fresh and canned meat.

Civilian consumption during the war and immediate post-war years was considerably lower than previously (due mainly to the effects of rationing), but, following the return to more normal conditions, rose to 131.6 lb. per head in 1950–51. In 1951–52, consumption fell again to 121.8 lb. per head, principally as a result of drought conditions prevailing in Queensland which restricted available supplies.

In the following table details of the production and disposal of beef and veal are shown for the periods stated.

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

Year.	Changes in Stock.	Production.	Exports.	For Canning.	Consumption in Australia as Human Food.	
					Total.	Per Head per Annum.
Average, 1936–37 to 1938–39 .. .. .	.. .. .	569	127	(a)	442	lb. 144.1
1949–50	— 9	607	94	75	447	124.3
1950–51	+ 10	651	81	72	488	131.6
1951–52	— 4	582	52	70	464	121.8

(a) Included with exports.

10. **Exports of Frozen Beef and Veal.**—The export of frozen meat from Australia dates from about 1881, and since that year the trade has grown considerably. The quantity of frozen beef and veal exported in 1938–39 amounted to 271,964,000 lb., valued at £4,323,680, but there was a decline during the war years owing to reduced production and the diversion of supplies to meet the requirements of the Australian and Allied Services based on Australia. By 1947–48 the quantity exported had risen again to 237,150,000 lb., valued at £6,192,615, but in subsequent years it declined once more and in 1951–52 amounted to only 95,876,000 lb., valued at £5,229,844. The quantities and values of frozen beef and veal exported during the five pre-war years ended 1938–39 and in each year 1946–47 to 1951–52 are shown in the following table:—

EXPORTS OF FROZEN BEEF AND VEAL : AUSTRALIA.

Year.	Exports of Frozen and Chilled Beef.		Exports of Frozen Veal.	
	Quantity.	Value.	Quantity.	Value.
	’000 lb.	£	’000 lb.	£
Average, 1934–35 to 1938–39	231,355	3,188,491	10,353	165,205
1946–47	178,298	4,521,746	2,040	60,127
1947–48	234,593	6,110,568	2,557	82,047
1948–49	189,007	5,715,934	2,646	99,532
1949–50	178,128	6,522,476	4,233	182,175
1950–51	154,832	6,440,395	3,478	207,459
1951–52	92,926	5,008,788	2,950	221,056

Prior to the war the largest purchaser of Australian beef and veal was the United Kingdom, which during 1938–39 took about 90.2 per cent. of the total shipments. However, at the request of the United Kingdom Government there was a considerable diversion from that country to nearer British possessions during the war years. In 1951–52 shipments to the United Kingdom were valued at £2,031,040 or 38.8 per cent. of the total value of beef and veal exports, while exports to other British countries amounted to £2,483,284, equivalent to 47.4 per cent. of the total.

In view of the preference overseas for chilled beef, the Australian beef industry was at a serious disadvantage until investigations proved that beef could be successfully transported from Australia to United Kingdom in a chilled condition. Trial shipments of 254,000 lb. in 1932-33 and 1,515,000 lb. in 1933-34 were made, and the exports in subsequent years increased to a maximum of 58,963,000 lb. in 1938-39. However, the advent of war seriously affected the export trade in chilled beef, which declined to a negligible amount after 1939-40.

§ 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 were, 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. **Movement in Sheep Numbers in Australia.**—Fluctuations in the number of sheep recorded in Australia for each year from 1860 onwards may be seen from the graph on page 809. Up to 1945 there were five marked periods of decline, but the losses were made up rapidly. In each of the years 1925 to 1945 the sheep flocks exceeded 100 million, reaching 125,189,129 in 1942, the greatest number recorded in Australia. At no previous period have such large numbers been depastured continuously, and the development took place despite an increase in the annual slaughter for the meat trade over this period, from about 10 million to 25 million.

However, a sharp decline to 105 million occurred in 1945, followed by a further reduction to 96.4 million in 1946 and to 95.7 million in 1947. This represented a loss from all causes other than slaughtering of about 37 million sheep (30 per cent.) since 1944 and was largely attributable to the severe drought conditions experienced during 1944, 1945 and 1946. The passing of the drought and consequent re-stocking resulted in a rise in sheep numbers to 108.7 million in 1949, 112.9 million in 1950, 115.6 million in 1951 and 117.6 million in 1952.

The following table shows the approximate movement in sheep numbers in Australia in each season 1938-39 to 1951-52:—

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

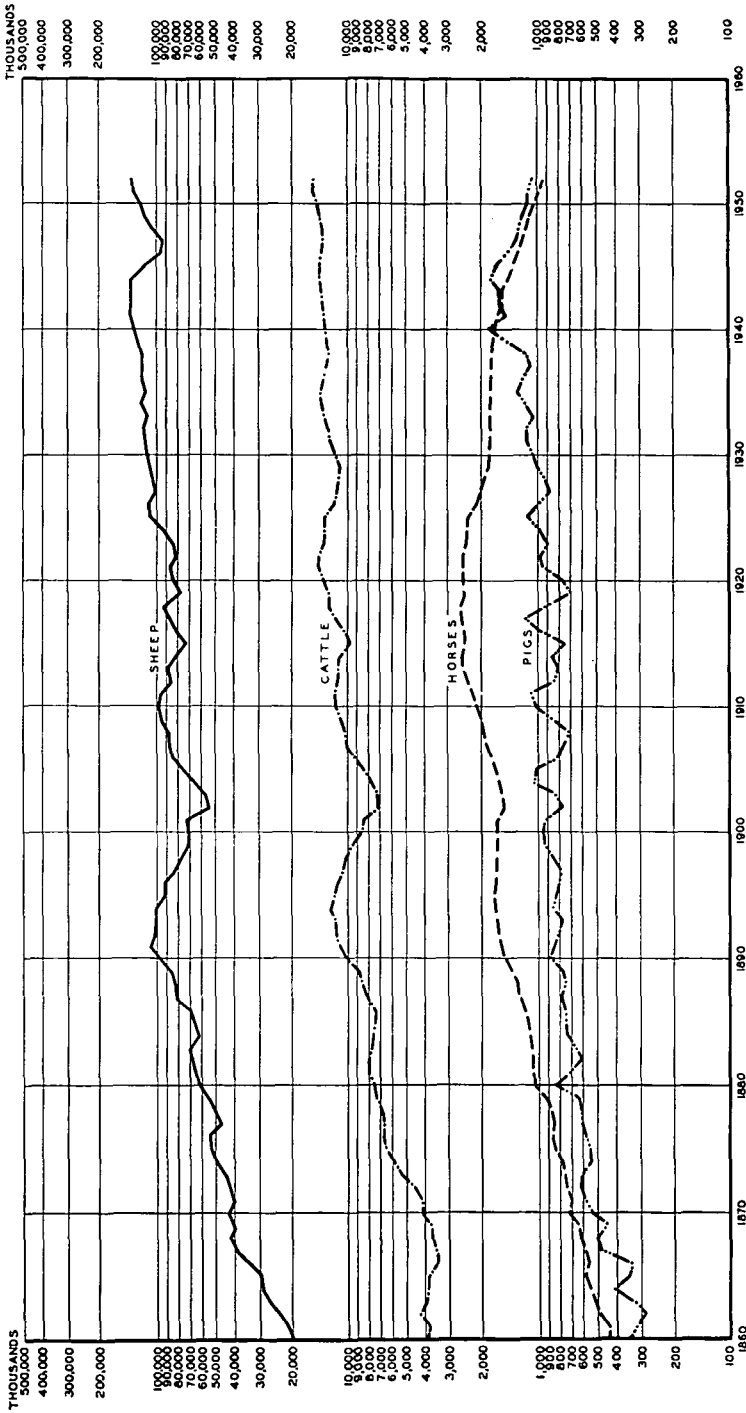
Season.	Lambs Marked.	Excess of Exports.	Sheep and Lambs Slaughtered.	Estimated Number of Deaths from Disease, Drought, etc.(a)	Number at 31st March.	Annual Net Increase (+) or Decrease (-)
1938-39 ..	25,469	67	18,900	8,817	(b) 111,058	- 2,315
1939-40 ..	33,300	72	19,006	5,975	(b) 119,305	+ 8,247
1940-41 ..	32,238	86	21,822	6,941	(b) 122,694	+ 3,389
1941-42 ..	32,246	65	22,258	7,428	(b) 125,189	+ 2,495
1942-43 ..	32,268	5	25,573	7,264	124,615	- 574
1943-44 ..	33,366	7	26,585	8,215	123,174	- 1,441
1944-45 ..	25,635	3	25,632	17,803	105,371	- 17,803
1945-46 ..	20,683	22	17,682	11,954	96,396	- 8,975
1946-47 ..	25,186	80	18,362	7,417	95,723	- 673
1947-48 ..	30,149	79	17,059	6,175	102,559	+ 6,836
1948-49 ..	30,642	84	17,477	6,905	108,735	+ 6,176
1949-50 ..	30,382	96	20,929	5,201	112,891	+ 4,156
1950-51 ..	29,816	84	16,223	10,804	115,596	+ 2,705
1951-52 ..	27,183	79	15,426	9,627	117,647	+ 2,051

(a) Balance figure.

(b) As at commencement of last year shown.

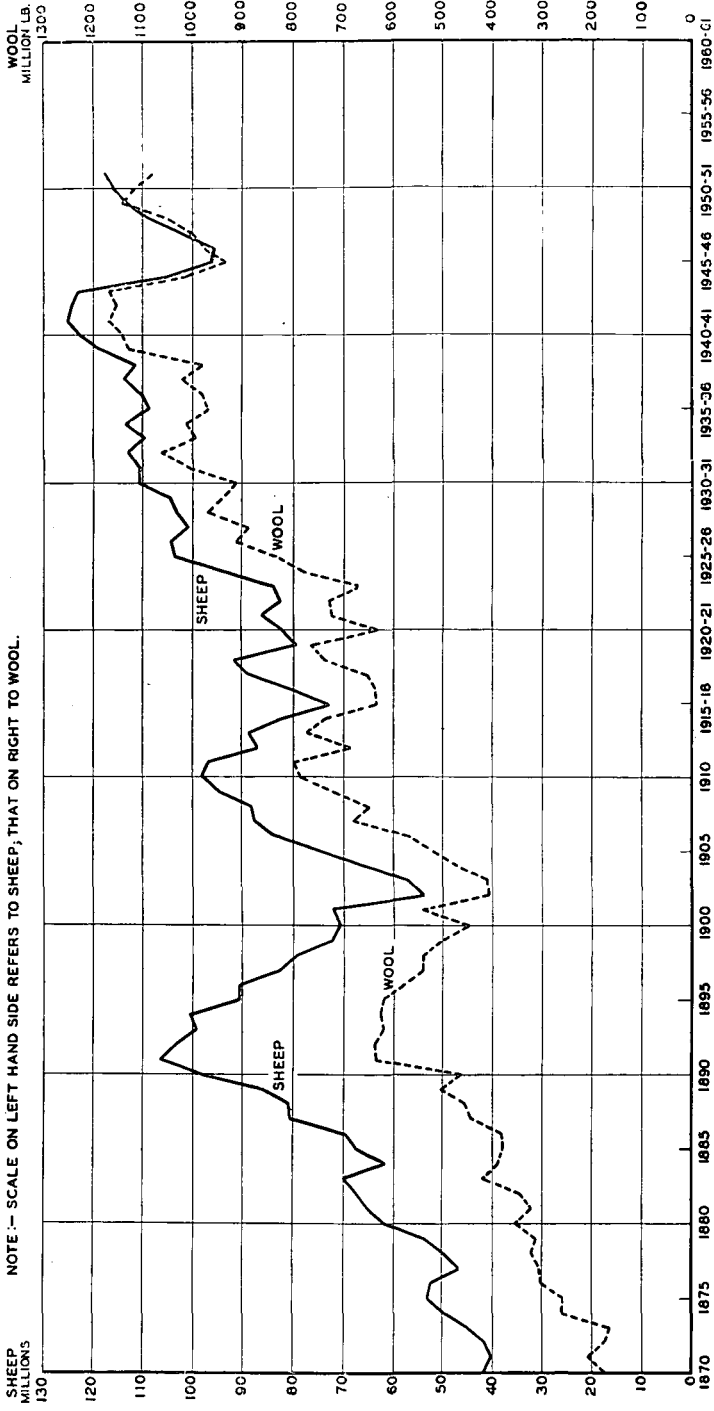
LIVESTOCK : AUSTRALIA, 1860 TO 1952

RATIO GRAPH



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

SHEEP NUMBERS AND WOOL PRODUCTION: AUSTRALIA 1870 to 1951-52



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

A graph indicating the distribution of sheep in Australia at 31st March, 1948, is shown on page 907 of Official Year Book No. 39. Similar graphs for the years 1938–39 and 1924–25 were published in Official Year Books No. 34, page 452 and No. 22, page 659, respectively.

The numbers of sheep in the several States and Territories for each year 1948 to 1952 compared with the average for the years 1935 to 1939 are shown in the following table:—

SHEEP : NUMBER.
('000.)

Year.	N.S.W.	Vic.	Q'land.	S. Aust.	W.Aust.	Tas.	Nor. Terr.	Aust. Cap. Terr.	Total.
Average, 1935 to 1939 ..	51,774	17,555	21,061	8,515	9,839	2,312	23	240	111,319
1948 ..	46,065	17,931	16,743	9,055	10,444	2,087	19	215	102,559
1949 ..	50,404	19,170	16,499	9,366	10,872	2,160	26	238	108,735
1950 ..	53,298	19,161	17,382	9,477	10,923	2,170	26	254	112,891
1951 ..	54,111	20,012	17,478	10,166	11,362	2,181	29	257	115,596
1952 ..	53,676	21,537	16,164	11,470	12,188	2,338	31	243	117,647

Except when affected by drought, the relative number of sheep depastured in the different States has remained fairly constant.

The percentage distribution in 1952 was:—New South Wales, 45.6; Victoria, 18.3; Queensland, 13.7; South Australia, 9.8; Western Australia, 10.4; Tasmania, 2.0; Northern Territory, 0.0; Australian Capital Territory, 0.2.

4. **Classification of Sheep According to Age, Sex and Breed.**—In the following table numbers of sheep in Australia are classified according to age and sex at 31st March of the years 1943 and 1949 to 1952. Data in this form are not available prior to 1943.

SHEEP : AGE AND SEX, AUSTRALIA.
('000.)

Description.	31st March—				
	1943.	1949.	1950.	1951.	1952.
Rams, 1 year and over ..	1,651	1,443	1,497	1,473	1,507
Breeding ewes (including ewes intended for mating)	56,674	50,855	52,122	52,794	52,954
Other ewes, 1 year and over	9,636	6,796	6,982	6,760	7,451
Wethers, 1 year and over ..	31,986	26,199	29,251	31,516	34,032
Lambs and hoggets, under 1 year ..	24,667	23,442	23,039	23,053	21,703
Total, Sheep and lambs	124,614	108,735	112,891	115,596	117,647

Particulars relating to the principal breeds of sheep were collected uniformly for all States and the Australian Capital Territory at 31st March, 1950 and are shown in the following table. Later details are not available for all States:—

SHEEP : PRINCIPAL BREEDS, 31st MARCH, 1950.
('000.)

Breed.	N.S.W.	Victoria.	Q'land.	S. Aust.	W. Aust.	Tas.	N.T. (a)	A.C.T.	Australia.
Merino ..	40,017.8	6,370.4	17,326.5	7,717.9	9,666.6	284.6	25.4	224.9	82,134.1
Other recognized breeds	3,376.6	4,451.7	71.4	692.7	496.6	875.9	0.1	12.5	9,977.5
Merino comebacks(b)	3,441.7	2,080.3	54.6	167.4	139.9	326.8	0.1	7.5	6,218.3
Crossbreeds(c)	6,461.9	5,758.6	129.6	899.0	620.1	683.0	0.2	8.6	14,561.0
Total ..	53,298.0	19,161.0	17,582.1	9,477.0	10,923.2	2,170.3	25.8	253.5	112,890.9

(a) As at 31st December, 1949. Distribution between categories has been estimated. (b) Merino comeback is the progeny of a crossbred merino ewe and a merino ram, i.e., finer than half-bred. (c) Half-bred and coarser.

5. **Numbers of Sheep on Rural Holdings.**—A special series of tabulations relating to rural holdings in Australia was compiled for 1949-50 and published in *Primary Industries Bulletin* No. 44. The tables relating to sheep farming show classifications according to areas of the holdings on which the sheep were carried.

6. **Comparison with other Countries.**—As regards the size of its flocks and the quantity and quality of wool produced, Australia has long occupied a leading position amongst the sheep-raising countries of the world. In 1951-52, Australian flocks numbered 118 million sheep, compared with the estimate of 153 million for the U.S.S.R. (Russia), China and Eastern Europe, with about 48 million in Argentina and about 46 million in India and Pakistan together.

The following table shows the number of sheep in Australia in relation to the numbers in some of the principal sheep-raising countries of the world for the last available pre-war year and at the latest date of enumeration for which figures are published. The figures have been compiled by the Commonwealth Economic Committee and the International Wool Textile Organization, who have estimated the world sheep numbers in 1951-52 at 769 million.

SHEEP : NUMBER IN VARIOUS COUNTRIES.

('000,000.)

Country.	Year.		
	1938-39.	1950-51.	1951-52.(a)
U.S.S.R. (Russia), China, Eastern Europe(b) ..	(c) 134.0	145.0	153.0
Australia	111.1	115.6	117.6
Argentina	45.9	(b) 49.0	(b) 48.0
India and Pakistan	44.0	(b) 44.0	46.0
New Zealand	31.9	34.8	35.3
Union of South Africa	39.0	31.4	34.8
United States of America	51.3	30.6	32.1
Turkey	23.1	23.1	25.2
Uruguay	(b) 18.0	23.4	(b) 24.0
Spain	(b) 24.0	21.0	(b) 21.0
United Kingdom	26.8	20.4	20.0

(a) Provisional.

(b) Unofficial estimate.

(c) Excluding Eastern Germany.

7. **Oversea Imports and Exports of Sheep.**—As in the case of cattle, the oversea exports of live sheep from Australia are of comparatively little importance. During the last five years the principal consignments of ordinary sheep have been made to Malaya (British) from Western Australia. On 27th November, 1929, the export of stud sheep was prohibited, except with the approval of the Minister for Trade and Customs.

Sheep for breeding purposes, however, were being exported in increasing numbers up to the outbreak of war in the Pacific, and shipments in 1939-40 amounted to 23,329 sheep, valued at £79,955, compared with 1,411 valued at £48,415, in 1951-52. The chief countries to which sheep for breeding purposes were consigned in 1939-40 were New Zealand, South Africa, Japan and Korea and, in 1951-52, to New Zealand and United States of America. The ordinary flock sheep exported from Australia were, for the most part, consigned to Malaya. The following table shows the imports and exports of breeding and flock sheep for the years 1947-48 to 1951-52 compared with the average for the years 1934-35 to 1938-39.

SHEEP : IMPORTS AND EXPORTS, AUSTRALIA.

Year.	Imports.		Exports.		Net Exports.	
	No.	Value.	No.	Value.	No.	Value.
Average, 1934-35 to 1938-39	3,795	£ 30,435	65,188	£ 67,368	61,393	£ 36,933
1947-48 ..	702	17,612	79,538	145,418	78,836	127,806
1948-49 ..	303	11,600	84,278	207,342	83,975	195,742
1949-50 ..	260	9,524	96,595	244,676	96,335	235,152
1950-51 ..	103	11,012	83,799	342,932	83,696	331,920
1951-52 ..	300	13,726	79,177	369,207	78,877	355,481

8. Sheep Slaughtered.—The following table shows the numbers of sheep slaughtered in the several States during each of the years ended June, 1948 to 1952 compared with the average for the years ended June, 1935 to 1939 :—

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

Year.	Slaughterings Passed for Human Consumptions.									Total Slaughterings including Boiled Down.
	N.S.W.	Vic.	Qld.	S.A.	W.A.	Tas.	N.T.	A.C.T.	Total.	
Average, 1934-35 to 1938-39 ..	a 6,474	7,797	1,101	b 1,703	b 1,178	358	(b) ..	25	18,636	18,693
1947-48 ..	5,743	6,242	1,036	1,755	1,442	376	3	46	16,643	16,672
1948-49 ..	6,456	6,692	994	2,208	1,515	420	3	48	18,336	18,384
1949-50 ..	6,787	8,366	959	2,284	1,347	508	3	59	20,313	20,386
1950-51 ..	5,493	5,799	745	1,892	1,230	485	1	51	15,696	15,782
1951-52 ..	5,521	6,082	829	1,680	1,319	482	1	53	15,967	16,019

(a) Average, years ended March.

(b) Average, years ended previous December.

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

PRODUCTION OF MUTTON AND LAMB.
(Tons.)

Year.	N.S.W.	Victoria.	Q'land.	S. Aust.	W. Aust.	Tas.	N.T.	A.C.T.	Total.
Average, 1934-35 to 1938-39	103,706	135,149	20,166	29,710	20,476	6,035	1	396	315,639
1947-48 ..	102,818	108,610	18,664	33,289	24,120	6,906	59	814	295,280
1948-49 ..	114,338	114,738	18,440	39,452	24,872	7,574	83	886	320,383
1949-50 ..	119,815	148,234	17,673	39,913	22,446	8,926	57	1,049	358,133
1950-51 ..	92,463	103,052	13,567	34,012	21,550	8,661	27	921	274,253
1951-52 ..	94,076	108,983	14,420	31,222	23,686	8,975	34	960	282,356

10. Consumption of Mutton and Lamb.—For the three pre-war years 1936-37 to 1938-39 the annual production of mutton and lamb averaged 319,000 tons of which 89,000 tons were exported leaving a balance of 230,000 tons (or the carcass equivalent of 74.9 lb. per head per annum) available for consumption.

Civilian consumption of mutton and lamb during the war years rose substantially. This was a direct result of the preference of the Defence Service and export demand for beef and of the system of rationing which was introduced (the coupon rating for mutton and lamb being low compared with beef). Consumption per head fell steeply in 1946-47 and has since been lower than in pre-war years.

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

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

Year.	Changes in Stock.	Pro-duction.	Exports.	For Canning and Dehydration.	Consumption in Aus- tralia as Human Food.	
					Total.	Per Head per Annum.
Average, 1936-37 to 1938-39 .. ..	.. ..	319	89	..	230	lb. 74.9
1947-48	- 5	295	55	7	238	69.8
1948-49	+ 8	321	52	7	254	73.1
1949-50	- 5	358	86	14	263	73.1
1950-51	+ 4	277	24	7	242	65.2
1951-52	+ 9	282	14	11	248	65.0

II. Exports of Frozen Mutton and Lamb.—The export trade in mutton and lamb preserved by cold process expanded rapidly up to 1913 when 205 million lb. were shipped. Progress was interrupted during the 1914-18 War and, owing probably to high wool prices, the exports of mutton and lamb for a number of years after were considerably less than earlier shipments. Exports commenced to rise again in 1929-30 and from that year onwards they continued to expand almost uninterruptedly until 1942-43, in which year 203,682,000 lb. of mutton and lamb, valued at £5,495,886, were exported. In earlier years shipments consisted mainly of frozen mutton, but in 1923-24 lamb supplanted mutton and the exports of lamb were largely responsible for the increase in total shipments during the ten years to 1942-43. Due to reduced production as a result of drought conditions and the diversion of supplies to meet the requirements of the Australian and Allied Services based in Australia, there was subsequently a marked decline in mutton and lamb exports, which fell to 56,575,000 lb., valued at £1,540,419, in 1945-46. The maximum quantity exported in the post-war years amounted to 193,092,000 lb. (£7,452,675) in 1949-50. In 1950-51 exports fell steeply to 54,108,000 lb. (£2,684,134) and in 1951-52 to 31,153,000 lb. (£1,918,007), the lowest quantity recorded this century with the single exception of the war year 1917-18.

The quantities and values of exports of frozen mutton and lamb in each year 1947-48 to 1951-52 compared with the average for the five years ended 1938-39 are shown in the following table:—

EXPORTS OF FROZEN MUTTON AND LAMB : AUSTRALIA.

Year.	Exports of Frozen Mutton.		Exports of Frozen Lamb.		Exports of Frozen Mutton and Lamb.	
	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.
	'000 lb.	£	'000 lb.	£	'000 lb.	£
Average, 1934-35 to 1938-39	40,584	656,194	153,606	4,208,318	194,190	4,864,512
1947-48	19,394	447,278	103,089	3,801,417	122,483	4,248,695
1948-49	27,509	651,082	87,355	3,571,091	114,864	4,222,173
1949-50	69,744	1,694,984	123,348	5,757,691	193,092	7,452,675
1950-51	8,424	289,781	45,684	2,394,353	54,108	2,684,134
1951-52	5,507	296,645	25,246	1,621,362	31,153	1,918,007

As with beef, the principal customer in this trade is normally the United Kingdom. In 1951-52 exports of mutton and lamb to the United Kingdom were, however, much lower than usual and only amounted to 16.9 per cent. and 44.4 per cent., respectively, of the total quantities exported.

§ 5. Wool.

1. **General.**—Australia is the leading wool-growing country in the world. With less than one-sixth of the world's sheep Australia produces more than one-quarter of the world's wool and of the total fine-quality merino wool, Australia produces about one-half. The bulk of the production is exported, but with the greater activity of Australian woollen mills the quantity used locally is increasing; the amount (greasy basis) so used represented more than 8 per cent. of the total production in 1951-52 compared with 6 per cent. in 1938-39.

The important position held by Australia among the principal sheep and wool producing countries of the world is shown in the following table. Further particulars of wool production in principal countries and of world production of wool by type are included in paragraph 6, World Wool Production.

SHEEP AND WOOL : PRINCIPAL PRODUCING COUNTRIES, 1951-52.

Country.	No. of Sheep ('000,000).	Wool Production ('000,000 lb. in terms of greasy).
U.S.S.R. (Russia), China, Eastern Europe ..	(a) 153.0	(a) 545
Australia	117.6	1,080
Argentina	48.0	420
New Zealand	35.3	407
United States of America	32.1	259
Union of South Africa	34.8	249

(a) Unofficial estimate. Source: Commonwealth Economic Committee and International Wool Textile Organization.

2. **Greasy and Scoured Wool.**—Whether the weight of the wool clip should be stated as “in the grease” or as “scoured and washed” is a matter which seriously affects comparisons between the clips of different seasons and of different countries. The quantity of grease and other extraneous matter in a fleece differs, not only between countries, but between districts in the same country. It fluctuates with the vagaries of the season, and with the breed and the condition of the sheep.

A committee of experts in a report to the Central Wool Committee estimated in 1940 that the clean scoured wool content of the total production of Australia averaged between 51 and 53 per cent. of its greasy weight. The Australian Wool Realization Commission assessed the clean scoured yield of the Australian wool clip in the 1951-52 season as 59 per cent. of the greasy weight.

Wool scoured in Australia by wool-scouring works, however, yields only about 46 per cent. because the grade of greasy wool treated locally for export as scoured includes a large proportion of dirty and low-grade wool.

The quantity of scoured and washed and carbonized Australian wool exported during the five years ended 1951-52 was approximately 29.0 per cent. of the total raw wool exports (excluding wool exported on skins) in terms of greasy.

3. **Production.**—The bulk of the Australian wool production is shorn from live sheep; approximately 6 per cent. is obtained by fellmongering and about 5 per cent. is on skins exported. Statistics of wool production are compiled from data received from growers, fellmongers, etc. The following table shows the production for the five years 1947-48 to 1951-52 compared with average production for the five years ended 1938-39. Particulars of the gross value of wool produced are based in the case of shorn wool upon the average price realized for greasy wool sold at auction and in the case of skin wools on prices recorded by fellmongers and skin exporters.

WOOL : TOTAL PRODUCTION (AS IN THE GREASE).

Particulars.	Average, 1934-35 to 1938-39.	1947-48.	1948-49.	1949-50.	1950-51.	1951-52.
	'000 lb.	'000 lb.	'000 lb.	'000 lb.	'000 lb.	'000 lb.
New South Wales ..	480,670	422,260	463,208	515,043	492,130	437,837
Victoria	165,586	199,531	204,080	225,243	218,266	224,958
Queensland	164,971	153,564	156,655	162,256	154,667	138,767
South Australia ..	85,120	116,451	114,905	121,248	125,384	135,484
Western Australia(a)	81,543	95,410	99,429	98,889	107,341	120,401
Tasmania	15,504	15,326	16,846	16,958	17,250	20,513
Northern Territory(b)	35	305	305	230	235	252
Australian Capital Territory	1,827	1,767	1,977	2,123	2,266	1,765
Australia—						
Shorn (including Crutchings)	888,677	902,589	958,860	1,027,949	1,029,149	998,708
Dead and Fellmongered ..	50,396	48,983	45,478	51,910	45,337	36,124
Exported on Skins ..	56,183	53,042	53,067	62,131	43,953	45,145
Total—Quantity ..	995,256	1,004,614	1,057,405	1,141,990	1,117,539	1,079,977
„ Value ..	£'000. 51,182	£'000. 158,691	£'000. 201,959	£'000. 289,005	£'000. 651,902	£'000. 322,615

(a) For year ended previous December.

(b) Estimated.

Production for 1952-53 was 1,300 million lb., valued at £435,000,000 (subject to revision).

4. **Care Needed in Comparing Clips.**—In comparing successive clips allowance must be made for the circumstance that, owing to climatic or other conditions, the time of shearing may be so far delayed in some areas that one clip may include almost thirteen months' growth of wool, while the succeeding one may include little more than eleven months' growth.

5. Average Weights of Fleeces Shorn.—The average weights of sheep and lamb fleeces shorn in each of the States of Australia and the Australian Capital Territory are shown in the following table for each season 1947-48 to 1951-52 compared with the average for the five seasons 1934-35 to 1938-39 :—

AVERAGE WEIGHT OF SHEEP AND LAMB FLEECES SHORN.

(lb.)

State.	Average, 1934-35 to 1938-39. (a)	1947-48.	1948-49.	1949-50.	1950-51.	1951-52.
SHEEP.						
New South Wales	8.87	9.88	9.97	9.82	9.68	8.43
Victoria	7.84	9.83	9.37	9.76	9.92	9.62
Queensland	7.98	9.46	9.57	9.83	9.10	8.08
South Australia	10.06	12.88	11.65	12.28	12.52	12.62
Western Australia	8.53	9.43	9.43	8.97	9.61	10.27
Tasmania	7.62	8.30	8.03	7.63	7.63	8.88
Australian Capital Territory	8.32	8.74	9.29	9.36	9.19	7.66
Australia(b)	8.57	9.97	9.85	9.89	9.83	9.18
LAMB.						
New South Wales	2.75	3.10	3.29	3.20	3.02	2.74
Victoria	2.14	2.86	2.89	2.72	2.83	2.87
Queensland	2.89	3.82	4.00	3.80	3.49	3.23
South Australia	2.57	4.12	3.56	3.52	3.67	3.70
Western Australia	2.57	2.70	2.68	2.62	2.73	2.90
Tasmania	1.37	1.98	1.91	1.76	1.91	2.05
Australian Capital Territory	1.11	1.25	1.51	1.17	1.30	1.04
Australia(b)	2.57	3.16	3.21	3.09	3.05	2.94

(a) Mean of average weights in each season.

(b) Excludes Northern Territory.

6. World Wool Production.—The following table shows particulars of total production of wool, in terms of greasy, in the principal wool-producing countries of the world, together with estimates of world production of merino, crossbred and carpet type wool for each season 1948-49 to 1951-52 compared with the average for the five seasons 1934-38. The data for countries other than Australia have been taken from reports published by the Commonwealth Economic Committee compiled from questionnaires prepared by the Committee and the International Wool Textile Organization.

In 1951-52 Australia produced 27 per cent. of the world total of all types of wool, the share of the British Commonwealth representing approximately 50 per cent. The principal wool producers, other than Australia, are Argentina with 11 per cent. of the world total, New Zealand, 10 per cent., United States of America, 7 per cent., and Union of South Africa, 6 per cent. Production in the Soviet Union, China and Eastern European countries together amounted to 14 per cent. World production of wool (all types) in 1951-52 was about 200 million lb. (5.3 per cent.) greater than the average for 1934-38.

Australia's wool clip is predominantly merino; New Zealand and Argentina produce mainly crossbred wool, while the clip of the U.S.S.R. (Russia) is largely of the carpet type. While world production of merino wool has declined by about 9 per cent. since pre-war, the production of crossbred types has risen by about 20 per cent. Carpet wool production has risen by about 5 per cent.

WORLD PRODUCTION OF WOOL.
(’000,000 lb.—in terms of greasy.)

Country and Type.	Average, 1934-38.	1948-49.	1949-50.	1950-51.	1951-52.(a)
British Commonwealth—					
Australia	995	1,057	1,142	1,118	1,080
New Zealand	300	367	390	390	407
South Africa (b) ..	261	227	225	240	249
United Kingdom ..	111	81	88	89	93
India and Pakistan ..	96	79	79	79	79
Other Commonwealth ..	45	32	29	32	31
Total	1,808	1,843	1,953	1,948	1,939
Foreign—					
Soviet Union, China, Eastern Europe (c) ..	450	467	484	522	545
Argentina	376	425	415	430	420
United States of America	451	296	264	259	250
Uruguay	114	144	163	185	187
Spain	60	104	90	85	85
Turkey	52	76	71	67	65
Other Foreign	477	448	432	463	488
Total	1,980	1,960	1,919	2,011	2,049
Grand Total	3,788	3,803	3,872	3,959	3,988
Apparel type—					
Merino	1,475	1,322	1,367	1,371	1,329
Crossbred	1,518	1,675	1,717	1,764	1,821
Carpet type	795	806	788	824	838

(a) Provisional. (b) Includes Basutoland and S.W. Africa Territory. (c) Comprising Soviet Union, Poland, Czechoslovakia, Hungary, Roumania, Bulgaria, Eastern Germany, Albania, China and Dependencies, Outer Mongolia and Tibet.

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

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

8. **Australian Wool Realization Commission.**—(i) *General.* The accumulation of Dominion wool in the hands of the United Kingdom Government as an outcome of the war-time arrangements and the disposal of these stocks concurrently with future clips were matters for discussion by a conference of officials and experts from the United Kingdom, the Commonwealth of Australia, the Dominion of New Zealand, and the Union of South Africa, held in London in April-May, 1945. At this conference it was

decided that the only sound method of handling the gigantic task of disposing of these stocks was by means of a partnership between the countries concerned, under which the old wool would be marketed and the marketing of the current clip supported throughout the period of disposal of stocks. To ensure that stability of wool prices would be achieved, a reserve price appropriate to type and governed by the general trend of prices, and at which the wool would be bought in if commercial bidding did not attain the appropriate level, was agreed upon.

(ii) *U.K.-Dominion Wool Disposals Limited.* The formation, by the four Governments, of a Joint Organization under the title of "U.K.-Dominion Wool Disposals Limited" (commonly referred to as "J.O.") was, therefore, undertaken for the purposes of buying, holding and selling wool on behalf of the United Kingdom and the Dominion Governments concerned. The Australian Wool Realization Commission was the Australian subsidiary of this organization. An account of the detailed provisions of the plan and of the functions and operations of the Australian Wool Realization Commission was given on pages 921-3 of Year Book, No. 38.

Total stocks of Dominion-grown wool in the ownership of the United Kingdom Government transferred to the Joint Organization at 31st July, 1945, were 10,407,000 bales comprising 6,796,000 bales of Australian-grown wool, 1,777,000 bales of New Zealand-grown wool and 1,834,000 bales of South-African-grown wool.

By the end of 1951 the whole of these stocks had been sold as well as the wool bought in by the Joint Organization at the reserve price. U.K.-Dominion Wool Disposals Limited went into voluntary liquidation on 22nd January, 1952.

Details of the stocks of wool held in Australia by the Central Wool Committee and its successor, the Australian Wool Realization Commission at the end of each year (31st July) from 1940 to 1951 will be found in Official Year Book No. 39, page 924.

Distributions to Australian wool growers on account of the profits arising from the transactions of J.O. in Australian wool were £23.6 million in November, 1949, £23.6 million in March, 1952, and £15.1 million in March, 1953.

(iii) *The-Contributory Charge.* Associated legislation, viz., the Wool (Contributory Charge) Act 1945 (subsequently replaced by the Wool (Contributory Charge) Act (No. 1) 1950-1951 and the Wool (Contributory Charge) Act (No. 2) 1950-1951) and the Wool (Contributory Charge) Assessment Act 1945-1951 provided for a contributory charge to be imposed on all wool produced in Australia and sold, purchased or processed by a manufacturer or exported on or after a date fixed by proclamation. The rate of the charge was to be such percentage as was prescribed from time to time of the sale value of the wool, the percentage being such as was necessary to provide the amounts required to meet the share of the industry in the operating expenses of the Joint Organization, the payment of interest on moneys expended by the Commonwealth in purchases of wool in pursuance of the Disposals Plan and unrecouped, and payment into the Wool Use Promotion Fund, as provided under the Wool Use Promotion Act 1945, of amounts equivalent to the amounts which would have been raised by the Wool Tax had it been operating.

As there was a substantial accumulation of funds collected by way of contributory charge and as the operations of J.O. had virtually ceased, the charge in 1951-52 was limited to a rate (one-eighth of one per cent.) which, it was calculated, would equal the amount which would otherwise have been raised by the Wool Tax for payment into the Wool Use Promotion Fund. The passage of amending Wool Tax legislation in June, 1952 made it possible to cease collection of the contributory charge at 30th June, 1952, and the legislation under which it was imposed was repealed. For further particulars of the Wool Contributory Charge and the amounts collected see Chapter XVII.—Public Finance, page 675.

(iv) *The Wool Tax.* As has been noted above, whilst the contributory charge legislation was in force the Wool Tax, which was imposed by the Wool Tax Act 1936 and the Wool Tax Assessment Act 1936, was not collected. When the Wool Tax was first imposed in 1936, the rate of tax was 6d. per bale, 3d. per fadge or 1d. per bag of wool delivered into the store of a wool dealer or wool selling broker or exported. The proceeds were paid into the Wool Publicity and Research Fund administered by the Australian Wool Board.

When collection of the contributory charge ceased, the Wool Tax again became operative (i.e. from 1st July, 1952) but at a rate of 4s. per bale, 2s. per fadge and 8d. per bag of wool. The new rates were provided for in the Wool Tax Act (No. 1) 1952 and the Wool Tax Act (No. 2) 1952, which also provided that in subsequent years the rate could be prescribed, by regulation, between limits of 2s. per bale and 5s. per bale.

(v) *Wool classified according to Quality.* Under control exercised during the 1939-45 War, records were kept of the classification of each lot of wool appraised according to quality, degree of fault and combing or carding type for each of the years 1940-41 to 1945-46. Since the resumption of auctions in 1946-47 this analysis has been continued by the Australian Wool Realization Commission, but the basis of the data has been changed to the catalogues of auction sales, excluding wool to which Joint Organization's reserves were not applicable, and not upon appraisement as previously. The following table provides a detailed analysis of wool appraised or sold at auction according to quality, for the years 1948-49 to 1951-52 compared with 1940-41, according to the records compiled by the Australian Wool Realization Commission. "Quality" ("64's, 60's, 58's," etc.) is a measure of the fineness and texture of wool for spinning purposes. Broadly, it means the maximum number of hanks of yarn, each of 560 yards length, which can be spun from 1lb. of combed wool. For instance, wool of 64's quality is of a fineness and texture which will produce 64 hanks, each of 560 yards, from 1lb. of tops (combed wool) of that particular wool.

**CLASSIFICATION OF GREASY WOOL APPRAISED OR SOLD AT AUCTION :
AUSTRALIA.**

(Bales of approximately 300 lb.)

Pre-dominating Quality.	1940-41.(a)		1948-49.(b)		1949-50.(b)		1950-51.(b)		1951-52.(c)	
	Quantity.	Per cent.	Quantity.	Per cent.	Quantity.	Per cent.	Quantity.	Per cent.	Quantity.	Per cent.
70's and finer	200,951	6.2	143,742	4.7	132,931	4.0	124,877	3.7	141,234	4.3
64/70's	679,377	20.8	498,285	16.4	518,492	15.4	523,070	15.6	579,117	17.6
64's	869,117	26.7	558,785	18.4	618,226	18.4	625,749	18.6	536,872	16.4
64/60's	236,138	7.2	265,159	8.7	305,412	9.1	296,029	8.8	229,926	7.0
60/64's	408,534	12.5	422,161	13.9	524,380	15.6	525,883	15.7	458,170	13.9
60's and 60/58's	387,164	11.9	353,373	11.6	415,646	12.3	427,673	12.7	449,716	13.7
Total 60's and finer	2,781,281	85.3	2,241,505	73.7	2,515,087	74.8	2,523,881	75.1	2,395,035	72.9
58's	270,371	8.3	340,606	11.2	369,930	11.0	371,143	11.1	406,786	12.4
56's	135,232	4.2	288,717	9.5	307,876	9.2	300,375	9.0	306,996	9.4
50's	39,619	1.2	115,075	3.8	114,482	3.4	112,295	3.3	119,758	3.7
Below 50's	21,089	0.6	37,583	1.3	31,413	0.9	27,978	0.8	30,460	0.9
Oddments	12,955	0.4	17,577	0.5	21,918	0.7	23,107	0.7	24,643	0.7
Grand total	3,266,517	100.00	3,041,063	100.00	3,366,706	100.00	3,358,779	100.00	3,283,678	100.00

(a) Appraised greasy wool. (b) Greasy wool sold at auction to which Joint Organization's reserves were applicable. (c) All greasy wool sold at auction except "wool re-offered account buyer".

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

(ii) *Subsidy on Woollen Goods, 1950-51.* In order to reduce the effects of greatly increased wool prices in the 1950-51 season (see para. 15 following), the Commonwealth Government paid a subsidy on woollen goods manufactured for consumption in Australia

from wool sold during the 1950-51 season. The subsidy was equivalent to about 45d. per lb. of all greasy wool (1950-51 clip) consumed in Australia, the total amount paid being approximately £17,000,000.

10. **Wool Publicity and Research.**—(i) *Wool Use Promotion.* In 1936 the Australian Wool Board was set up to take measures for improving the production and increasing the use of wool. The Board's functions were redefined in the Wool Use Promotion Act 1945 as the promotion, by publicity or other means, of the use of wool throughout the world and the performance of other approved functions for the benefit of the industry.

The Wool Use Promotion Act was further amended in 1953 when the title of the Australian Wool Board was altered to the Australian Wool Bureau and the Bureau's powers were again defined as including measures for improving the production of wool and the encouragement of research in Australia and other countries directed to the promotion of the use of wool.

The Bureau is also authorized to make arrangements with other bodies in Australia and overseas likely to be conducive to promoting the use of wool, improving the production of wool in Australia and encouraging research. By virtue of this power the Bureau is represented on the International Wool Secretariat, which was established in 1937 with head-quarters in London, to promote the use of wool through a broad programme of publicity, education and research. The Wool Boards of New Zealand and South Africa are also associated with the Australian Wool Bureau in the International Wool Secretariat and, through the Secretariat, in partnership with American wool industry representatives, in the Wool Bureau Inc. The Wool Bureau Inc. operates only in North America and has similar functions to the International Wool Secretariat.

The activities of the Australian Wool Bureau are financed from the Wool Use Promotion Fund, into which are paid the proceeds of the Wool Tax.

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

Finance for research is provided from a Wool Research Trust Account into which, since 1945, has been paid annually from the Commonwealth Consolidated Revenue a sum equal to the amount which is raised by the wool tax or its equivalent. In 1952-53 the Commonwealth's contribution to the Wool Research Trust Account was set at 2s. per bale, 1s. per fadge and 4d. per bag of wool on which wool tax was paid—i.e. one-half of the amount raised under the wool tax at its new rate. In addition, expenditure on items of a capital nature for the research programme may be met from the Wool Industry Fund which was constituted as a Trust Account from various moneys accumulated by the Central Wool Committee in war-time.

Ample opportunity is afforded for co-operation, in these research activities, with State Departments of Agriculture and other organizations.

11. **Consumption of Wool.**—(i) *Consumption of Raw Wool.* Statistics of raw wool consumption published in recent years for the purposes of broad international comparisons are based on the quantities of scoured or carbonized wool used on the woollen and worsted systems (mill consumption) plus quantities used in such processes as felting. Consumption estimates compiled on this basis have obvious defects as they disregard oversea trade in semi-processed wool (e.g. tops and yarn) as well as woollen goods. They are, however, comparatively simple to calculate and are useful in providing an approximate indication of trends in wool consumption. Estimates of raw wool consumption on the woollen and worsted systems and by felt manufacturers in Australia are shown below for the years 1938-39 and 1947-48 to 1951-52.

ESTIMATED CONSUMPTION OF RAW WOOL IN AUSTRALIA.
(’000 lb.)

Year.	Greasy Basis.			Clean Basis.		
	Used on woollen and worsted systems.	Used for felt manufacture (including Hats).	Total.	Used on woollen and worsted systems.	Used for felt manufacture (including Hats).	Total.
1938-39 ..	77,947	2,248	80,195	39,599	1,068	40,667
1947-48 ..	121,613	13,376	134,989	67,170	6,354	73,524
1948-49 ..	109,430	13,382	122,812	60,794	6,356	67,150
1949-50 ..	97,281	9,356	106,637	54,046	4,444	58,490
1950-51 ..	90,801	8,700	99,501	51,307	4,133	55,530
1951-52 ..	72,868	5,548	78,416	42,731	2,635	45,366

(ii) *Consumption of Locally Processed Wool.* As considerable quantities of tops, noils and yarn are exported from Australia, the series on raw wool consumption shown above is over-stated to this extent. The series entitled "Consumption of Locally Processed Wool" published in previous issues of the Year Book provides a more reliable indication of wool consumption in Australia, as allowance has been made for exports of wool in semi-processed form. The series has recently been revised to some extent in respect of methods of calculation (including conversion factors used) and is shown below on the revised basis for the years 1938-39 and 1947-48 to 1951-52. Briefly the series measures consumption of wool in terms of yarn used in Australian mills and other factories to produce woollen cloth and other woollen goods, yarn used for hand knitting purposes (since 1949-50) and scoured wool used for felt manufacture. No allowance has been made for oversea trade in woollen piece goods, clothing, etc., because of the obvious difficulties of accurately estimating the wool content of these products.

ESTIMATED CONSUMPTION OF LOCALLY PROCESSED WOOL IN AUSTRALIA.
(’000 lb.)

Year.	Greasy Basis.				Clean Basis.			
	Worsted Yarn Used. (a)	Woollen Yarn Used.	Scoured Wool used for Felt Manufacture (including Hats).	Total.	Worsted Yarn Used. (a)	Woollen Yarn Used.	Scoured Wool used for Felt Manufacture (including Hats).	Total.
1938-39 ..	31,568	21,393	2,248	55,209	16,353	11,130	1,068	28,551
1947-48 ..	44,492	40,933	13,376	98,801	24,100	23,356	6,354	53,810
1948-49 ..	48,461	38,642	13,382	100,485	26,752	22,384	6,356	55,492
1949-50 ..	53,821	37,724	9,356	100,901	29,730	21,557	4,444	55,731
1950-51 ..	47,215	34,069	8,700	89,984	26,050	19,818	4,133	50,001
1951-52 ..	36,332	28,674	5,548	70,554	20,657	17,243	2,635	40,535

(a) Includes hand knitting yarns used from 1949-50.

12. *Exports of Wool.*—(i) *Greasy—Quantities.* Prior to the 1939-45 War, Australian greasy wool exported overseas was sent principally to the United Kingdom and other European countries. In 1938-39, 41.9 per cent. of total shipments were sent to the United Kingdom, other important consignees being France, 20.4 per cent., Belgium, 13.1 per cent., and Japan, 9.1 per cent. During the war, exports to the United Kingdom declined and shipments to the European continent and to Japan virtually ceased, while the quantity shipped to the United States of America showed great expansion. Of the total quantity of greasy wool exported overseas during the five years ended 1951-52, 13.0 per cent. was sent to the United States of America and 33.6 per cent. to the United Kingdom. Of the total shipments in 1951-52, 29.0 per cent. went to the United Kingdom, 16.3 per cent. to France, 15.7 per cent. to the United States of America, and 11.7 per cent. to Japan. The following table shows the quantities of greasy wool exported, and the principal countries of recorded destination.

EXPORTS OF GREASY WOOL (AUSTRALIAN PRODUCE).
(’000 lb.)

Country to which Exported.	Average, 1934-35 to 1938-39.	1947-48.	1948-49.	1949-50.	1950-51.	1951-52.
United Kingdom ..	288,436	277,401	355,403	379,804	274,442	238,748
Other British Countries ..	2,158	8,275	6,848	7,652	8,773	4,589
Belgium ..	107,928	106,419	94,944	120,913	93,147	58,936
France ..	100,476	155,548	195,855	142,528	131,117	134,199
Germany ..	36,955	18,769	16,801	53,338	37,321	25,437
Italy ..	21,748	38,066	104,252	66,632	63,339	84,212
Japan ..	131,302	1,834	22,561	55,392	69,383	96,002
Netherlands ..	12,666	8,052	8,974	9,969	5,136	2,628
Poland ..	12,396	5,196	29,255	36,812	22,566	10,579
United States of America ..	25,739	118,869	70,338	116,743	154,203	129,691
Other Foreign Countries ..	23,076	35,794	76,805	67,870	48,044	38,942
Total ..	762,880	774,223	982,036	1,057,653	907,431	823,963

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

EXPORTS OF WOOL—SCOURED AND WASHED AND CARBONIZED (AUSTRALIAN PRODUCE).
(’000 lb. actual weight.)

Country to which Exported.	Average, 1934-35 to 1938-39.	1947-48.	1948-49.	1949-50.	1950-51.	1951-52.
United Kingdom ..	32,806	71,395	55,088	66,537	42,365	19,977
Canada ..	2,394	10,201	10,076	10,545	7,648	4,572
Other British Countries ..	935	4,398	3,869	1,133	1,472	886
Belgium ..	8,226	13,065	7,465	9,695	5,057	4,651
France ..	9,301	17,682	25,328	11,639	6,974	7,218
Germany ..	3,007	762	882	5,450	3,118	3,692
Italy ..	360	4,567	10,523	6,010	6,081	6,821
Japan ..	724	..	98	934	7,186	1,085
Poland ..	1,002	5	160	196	..	..
United States of America ..	668	5,046	4,867	11,630	21,793	23,215
Other Foreign Countries ..	4,752	19,355	20,365	22,515	13,281	10,155
Total ..	64,175	146,386	138,721	146,325	114,975	82,272

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

EXPORTS OF WOOL TOPS, NOILS AND WASTE (AUSTRALIAN PRODUCE).
(’000 lb. actual weight.)

Particulars.	Average, 1934-35 to 1938-39.	1947-48.	1948-49.	1949-50.	1950-51.	1951-52.
Tops ..	5,948	7,039	4,827	3,946	2,633	3,725
Noils ..		4,307	5,076	3,715	2,728	2,647
Waste—Soft wool ..		5,843	3,399	4,135	3,324	2,815	1,438
Hard wool ..	5,843				5,672	4,450	7,692

(iv) *Total Exports—Greasy and Clean Bases.* The following table shows the estimated greasy and clean weights of exports of raw and semi-processed wool for the years 1938-39 and 1947-48 to 1951-52.

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

Particulars.	1938-39.	1947-48.	1948-49.	1949-50.	1950-51.	1951-52.
GREASY BASIS.						
Raw Wool—						
Greasy	795,728	774,223	982,036	1,057,653	907,446	823,963
Scoured and Washed and Carbonized ..	137,391	305,684	289,792	307,627	243,154	172,150
Exported on Skins ..	58,187	53,042	53,067	62,129	43,953	46,045
Total	991,306	1,132,949	1,324,895	1,427,409	1,193,653	1,042,158
Semi-manufactured Wool—						
Tops	10,124	13,726	9,461	7,458	5,003	7,078
Yarn	58	3,474	1,965	1,029	1,321	861
Total Wool..	1,001,488	1,150,149	1,336,321	1,435,896	1,199,977	1,050,097
CLEAN BASIS.						
Raw Wool	(a)	608,614	719,899	778,339	666,602	590,192
Semi-manufactured Wool	5,071	9,446	6,336	4,652	3,520	4,403
Total Wool..	(a)	618,060	726,235	782,991	670,122	594,595

(a) Not available.

(v) *Total Value of Exports.* The value of wool of Australian origin exported from Australia during the five years ended 1951-52 averaged 52.0 per cent. of the total value of exports of merchandise of Australian origin, and during 1951-52 the proportion was 49.2 per cent. The value during the period under review, together with the principal countries to which wool was exported, is shown in the following table.

VALUE OF WOOL EXPORTS (AUSTRALIAN PRODUCE).
(£'000.)

Country to which Exported.	Average, 1934-35 to 1938-39.	1947-48.	1948-49.	1949-50.	1950-51.	1951-52.
United Kingdom ..	19,233	51,968	80,495	114,983	193,598	89,067
Other British Countries	703	5,720	5,804	6,248	14,169	5,999
Belgium	5,863	15,536	15,808	24,124	42,161	17,036
France	5,618	22,775	40,262	34,851	76,352	43,813
Germany	2,602	3,894	3,877	15,504	23,822	11,443
Italy	1,340	7,470	23,680	17,627	40,027	30,357
Japan	7,727	399	4,808	14,003	51,524	40,624
Netherlands	777	2,015	2,922	4,497	5,220	1,620
Poland	793	1,123	7,291	12,483	14,752	4,963
United States of America	2,252	24,452	20,722	40,162	132,570	59,047
Other Foreign Countries	1,859	13,386	25,727	28,654	39,103	19,439
Total	48,767	148,738	231,396	313,136	633,298	323,428

13. *Local Sales of Wool.*—In 1946-47 following the cessation of the war-time acquisition scheme which ended with the 1945-46 season, auction sales were resumed in Australia. Sales are conducted at Sydney, Goulburn, Newcastle, Albury, Melbourne, Geelong, Ballarat, Brisbane, Adelaide, Perth, Hobart and Launceston, and are attended by buyers representing manufacturers and merchants in the United Kingdom, France, the United States of America, Japan, U.S.S.R. and many other countries. More than 95 per cent. of the Australian wool clip is now disposed of at auction in Australia.

14. **Stocks of Wool.**—In the following table, stocks of raw wool held in Australia by factories (woollen mills, wool scourers and fellmongeries), brokers and Joint Organization are shown at 30th June, 1948 to 1952. Stocks of wool on skins have been omitted, as wool on skins is not recorded as production until fellmongered in Australia or exported on skins.

STOCKS OF RAW WOOL^(a) HELD IN AUSTRALIA AT 30th JUNE.
(*000 lb.)

Held by—	1948.	1949.	1950.	1951.	1952.
GREASY AND SLIPE WOOL.					
Factories ^(b)	66,250	38,837	39,136	43,728	25,962
Brokers ^(c)	11,327	33,814	14,211	18,244	12,246
Joint Organization	517,303	253,061	56,188	2	..
Total	594,880	325,712	109,535	61,974	39,208
SCOURED AND CARBONIZED WOOL.					
Factories ^(b)	8,635	6,118	6,842	10,722	8,461
Joint Organization	73,475	42,603	11,512	..	..
Total	82,110	48,721	18,354	10,722	8,461
TOTAL RAW WOOL (AS IN THE GREASE).					
Factories ^(b)	83,520	51,073	52,820	65,172	43,884
Brokers ^(c)	11,327	33,814	14,211	18,244	12,246
Joint Organization	656,015	333,448	77,909	2	..
Total	750,862	418,335	144,940	83,418	56,130

(a) Excludes stocks of wool on skins.
(c) Unsold wool; assumed to be all greasy.

(b) Woollen mills, wool scourers and fellmongeries.

15. **Value.**—Wool is the chief factor in the pastoral wealth of Australia, and the nation's prosperity is largely dependent upon its satisfactory sale. During the three years ended 1951-52 the price of greasy wool sold in the selling centres of Australia averaged 93.4d. per lb. compared with the average United Kingdom contract price of 14.59d. per lb. during the years 1939-40 to 1945-46 and the average selling price of 11.5d. per lb. during the ten years ended 1938-39. The average for the nine years ended 1928-29 was 18d. per lb., and for the seven years ended 1913-14, 9d. per lb. The heavy decline in the price of wool which commenced in 1929-30 continued during the next three years. In 1933-34, prices rose in a remarkable manner, averaging 15.84d. per lb., compared with 8.72d. per lb. for the previous year, an increase of 81.6 per cent. A decline in 1934-35 was succeeded by a period of rising prices in the two years following, but in 1937-38 and in 1938-39 prices again receded.

As mentioned in paragraph 7 above, the price of wool during the 1939-45 War was determined by the British Government wool contract. The price fixed for the years 1939-40 to 1941-42 was 13.4375d. per lb., and for the years 1942-43 to 1945-46, 15.45d. per lb. With the return to auction sales since 1945-46, the average price of greasy wool sold rose to 24.49d. per lb. in 1946-47, 39.50d. per lb. in 1947-48, 48.07d. per lb. in 1948-49, 63.35d. per lb. in 1949-50 and to the unprecedented level of 144.19d. per lb. in 1950-51. This was followed by a sharp fall in 1951-52 to 72.42d. per lb. or to only slightly more than half the price in 1950-51. It was however higher than in any of the years preceding 1950-51.

The effect of fluctuating wool values upon the national income is reflected in the following figures. Based upon appraisal in each State plus certain adjustments as recorded by the State Statisticians, the gross value of wool produced in Australia for

1942-43 amounted to £73,017,000 and for 1943-44 to £75,124,000 compared with £42,043,000 realized during 1938-39 under open market conditions. The value in 1944-45 and 1945-46 declined to £64,894,000 and £58,597,000 respectively, as a result of decreased production. In 1924-25 when the record pre-war price was realized, the value was £81,430,000, and in the year 1930-31, £34,804,000. With the remarkable increases in post-war wool prices, the value of production rose to £96,858,000 in 1946-47, to £158,691,000 in 1947-48, to £201,959,000 1948-49, to £289,905,000 in 1949-50, and to the all time record figure of £651,902,000 in 1950-51. As a result of the marked decline in wool prices in 1951-52 the value of production fell to £322,615,000 or slightly less than half the value recorded in 1950-51.

The following table shows the average auction-room price of greasy wool in Australia for 1938-39 and 1947-48 to 1951-52 as compiled by the National Council of Wool Selling Brokers. This latter price represents the average price realized for all greasy wool of whatever type or quality marketed during the year indicated.

WOOL: AVERAGE MARKET PRICE PER LB.(a)
(Pence.)

Description.	1938-39.	1947-48.	1948-49.	1949-50.	1950-51.	1951-52.
Greasy	10.39	30.50	48.07	63.35	144.19	72.42

(a) Average price realized for all greasy wool of whatever type or quality marketed in Australia during the year. (Source—National Council of Wool Selling Brokers of Australia.)

16. **United Kingdom Importation of Wool.**—The important position which Australia occupies in the supply of wool to the United Kingdom is indicated in the following statement of the quantities of wool imported into that country from the principal wool-producing countries during 1938 and each year 1948 to 1952.

WOOL(a) : IMPORTS INTO UNITED KINGDOM.

Country of Origin.	1938.	1948.	1949.	1950.	1951.	1952.
	'000 lb.	'000 lb.	'000 lb.	'000 lb.	'000 lb.	'000 lb.
Australia	365,519	331,927	472,500	383,643	255,941	320,728
New Zealand	197,995	226,059	209,449	180,144	138,546	100,744
Union of South Africa	106,601	57,434	59,596	59,747	45,900	64,045
India and Pakistan	46,049	23,103	27,194	30,269	27,184	26,496
Ireland, Republic of	8,277	5,994	6,655	8,089	4,307	7,561
Falkland Islands	1,426	4,500	4,025	4,456	4,429	4,051
Other British Countries	4,566	1,823	2,712	3,387	3,071	1,987
Argentina	79,303	4,448	4,223	2,280	7,698	23,805
Uruguay	22,073	19,612	28,003	30,825	18,806	56,273
Other Foreign Countries	49,517					
Total Quantity	881,326	674,900	814,357	702,840	505,912	695,690
Total Value (£'000 sterling)	40,996	86,227	126,781	185,118	238,394	171,122

(a) Greasy and Scoured.

Australian wool represented 52.0 per cent. of the total quantity imported into the United Kingdom during the five years ended 1952. New Zealand supplied 27.8 per cent. and South Africa 8.4 per cent., while the total quantity received from British countries constituted 94.2 per cent. of all United Kingdom imports.

17. **Principal Importing Countries and Sources of Supply.**—The following table furnishes in respect of the principal importing countries details of their production and imports of wool for 1952 together with the chief sources of supply. The quantities imported refer to the actual weight of wool without distinguishing between greasy and scoured except in the case of the United States of America where estimated clean content of raw wool is quoted.

WOOL : PRINCIPAL IMPORTING COUNTRIES AND SOURCES OF SUPPLY, 1952.
(Million lb.)

Importing Country.	Pro- duction of Importing Country. (a)	Quantity Imported from(b)—					Total Imports.
		Australia.	Union of South Africa.	Argen- tina.	New Zealand.	Other Countries.	
United Kingdom	88	320.7	64.0	23.8	190.7	96.5	695.7
Belgium	(c)	70.9	10.5	12.7	14.8	13.6	122.5
France	35	149.0	33.7	8.4	75.3	19.9	286.3
Germany (Federal Republic)	15	36.7	24.3	5.8	17.6	28.7	113.1
Italy	37	91.7	24.0	(d)	17.2	25.4	158.3
Japan	(c)	123.6	10.4	1.9	4.5	2.6	143.0
United States of America(e)	259	92.1	24.0	62.4	71.6	117.0	367.1

(a) As in the grease, 1951-52. (b) Actual weight of greasy and scoured wool. (c) Not available. (d) Included, in "Other Countries". (e) Imports are in terms of estimated clean content of greasy and scoured wool. Actual weight of total United States of America imports was 521.9 million lb.

As a considerable transit trade exists between continental countries it must not be assumed that the whole of the imports recorded by these countries are retained for their own consumption. The countries chiefly concerned with the transit trade are the United Kingdom (12 per cent. of total imports re-exported in 1952), Belgium and France.

§ 6. Trade in Hides and Skins.

1. **Extent of Trade.**—In addition to the hides and skins treated locally, considerable quantities are exported: the value of cattle and horse hides, and sheep and other skins, sent overseas during the five years ended 1951-1952 amounted to £84,066,840 or an average of £16,813,368 per annum.

2. **Sheepskins with Wool.**—The exports of sheepskins with wool, aggregating £59,568,175 during these five years, constitute the most important item in the values referred to in the preceding paragraph. During 1938-39 France was the largest purchaser of sheepskins with wool, taking 74 per cent. of the total consignments, while the United Kingdom ranked next with 15 per cent., followed by Germany with 7 per cent. In 1951-52, France obtained 67.5 per cent. of total exports, the United Kingdom 17.1 per cent., and the United States of America 5.4 per cent. The exports of sheepskins with wool during each of the years 1947-48 to 1951-52 compared with the average for the years 1934-35 to 1938-39 were as follows:—

EXPORTS OF SHEEPSKINS WITH WOOL : AUSTRALIA.

Particulars.	Average, 1934-35 to 1938-39.	1947-48.	1948-49.	1949-50.	1950-51.	1951-52.
Number .. '000	12,000	11,233	11,255	14,919	10,201	10,611
Value .. £	2,779,523	7,420,682	7,339,103	10,876,557	20,773,298	13,158,535

3. **Sheepskins without Wool.**—Up to 1943-44 sheepskins without wool were exported chiefly to the United States of America. During the year mentioned this country accounted for 97 per cent. of the total shipments while the remaining 3 per cent. were exported to the United Kingdom, Canada and the U.S.S.R. There has, however, since been a decline in shipments to the United States of America and an increase in the quantities shipped to the United Kingdom and other countries; in 1951-52 the United States of America received 65 per cent. of total shipments; the United Kingdom 32 per cent. and other countries 3 per cent. Quantities and values for the five years 1947-48 to 1951-52 compared with the average for the years 1934-35 to 1938-39 are shown in the table hereunder:—

EXPORTS OF SHEEPSKINS WITHOUT WOOL : AUSTRALIA.

Particulars.	Average, 1934-35 to 1938-39.	1947-48.	1948-49.	1949-50.	1950-51.	1951-52.
Number .. '000	808	907	814	3,441	3,000	1,454
Value .. £	69,600	148,675	107,667	826,110	1,272,096	517,887

4. **Hides.**—(i) *Exports.* The export trade in cattle hides during 1951-52 was distributed as follows:—Japan, £231,065; United Kingdom, £193,655; Turkey, £179,927; Netherlands, £102,919; Italy, £81,780; and other countries, £319,812.

The exports during each of the five years 1947-48 to 1951-52 compared with the average for the years 1934-35 to 1938-39 are shown in the table below:—

EXPORTS OF CATTLE HIDES : AUSTRALIA.

Particulars.	Average, 1934-35 to 1938-39.	1947-48.	1948-49.	1949-50.	1950-51.	1951-52.
Number	956,552	101,681	270,514	272,197	210,871	177,916
Value .. £	791,730	312,562	1,177,040	1,340,471	1,344,533	1,109,158

Calfskins exported during the five years ended 1951-52 numbered 43,044, valued at £35,027. Exports of horse hides during the same period numbered 233,989, valued at £854,173.

(ii) *Imports.* The imports of cattle hides and calfskins are fairly large, the chief sources of supply being New Zealand and the Pacific Islands. The quantities and values of cattle hides, including calfskins, imported into Australia during the years 1947-48 to 1951-52 compared with the average for the years 1934-35 to 1938-39 were as follows:—

IMPORTS OF CATTLE HIDES AND CALFSKINS : AUSTRALIA.

Particulars.	Average, 1934-35 to 1938-39.	1947-48.	1948-49.	1949-50.	1950-51.	1951-52.
Quantity .. cwt.	70,781	26,554	14,245	13,490	12,126	28,590
Value .. £	273,658	213,367	81,520	76,231	111,604	401,641

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

EXPORTS OF FURRED SKINS : AUSTRALIA.
(£.)

Description.	Average, 1934-35 to 1938-39.	1947-48.	1948-49.	1949-50.	1950-51.	1951-52.
Rabbit and Hare ..	11,150,463	3,958,173	3,004,287	1,640,492	2,995,377	1,358,462
Opossum ..	124,627	15,176	6,943	44,103	6,282	25,560
Kangaroo ..	173,128	366,904	407,866	187,182	309,242	529,742
Fox ..	57,803	7,369	4,945	6,516	13,825	6,115
Wallaby ..	17,584	14,380	5,421	6,103	14,225	8,479
Other ..	11,215	1,129	276	4,035	17,037	3,575
Total ..	1,534,820	4,363,131	3,429,738	1,888,431	3,355,988	1,931,933

(a) Excludes hare skins.

These skins were shipped principally to the United States of America, the United Kingdom and Canada, the values taken by each in 1951-52 being shown in the following table :—

FURRED SKINS : EXPORTS TO PRINCIPAL COUNTRIES OF DESTINATION, 1951-52.
(£.)

Country.	Rabbit and Hare Skins.	Kangaroo Skins.	Fox Skins.	Other (Opossum, Wallaby, etc.).	Total.
United Kingdom ..	78,478	15,992	6,079	9,970	110,519
United States of America ..	1,085,569	512,835	26	19,476	1,617,906
Canada ..	64,586	..	..	..	64,586
Other Countries ..	129,829	915	10	8,168	138,922
Total ..	1,358,462	529,742	6,115	37,614	1,931,933

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

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

(iii) *Hides and Leather.* A hide acquisition and marketing scheme has been in operation since November, 1939. Until 31st December, 1948, the scheme operated under the National Security Regulations. Since 1st January, 1949, it has continued under a Commonwealth Act and six supporting State Acts.

The Australian Hide and Leather Industries Board, which administers the scheme, acquires all cattle hides and yearling and calf skins at prices from 15 per cent. to 20 per cent. above August, 1939 levels, and these are allocated to tanners at these prices. Surplus hides are disposed of by tender or open auction. The Board retains the amounts realized in excess of appraised values, and supplements the price to the producers in cases where the realized amount is less than the appraisement values.

Pre-war, about 40 to 45 per cent. of Australian production was exported, but with the development of the local tanning industry, the proportion is approximately 12½ per cent.

Returns from export sales of hides and deferred payments levied on leather exported, based on the difference between world and Australian prices for the hides involved, are paid into a fund by the Board. From this fund, premiums are paid to producers as a proportion of appraised values. These premiums compensate hide producers to some extent for the margin between local and oversea prices. Further details of the war-time operations of the scheme will be found in Official Year Book No. 37, page 387 and Official Year Book No. 38, pages 930-1.

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

§ 7. Tallow.

1. **Production.**—Australia's production of tallow is in excess of local requirements and considerable quantities are normally available for export. The recorded production in factories is incomplete as production in establishments which do not come within the definition of a factory is excluded. Details of production of tallow have also been collected on a calendar year basis from slaughtering establishments up to 1951. These have also proved defective in certain respects and, as a result, the table appearing in previous issues of the Official Year Book has been deleted until more complete information becomes available.

2. **Consumption in Factories.**—Details of consumption are collected from the principal factories using tallow (soap and candle, chemical and woolscouring works). Total consumption of tallow in factories as shown in the table below for the years 1938-39 and 1947-48 to 1951-52 is however deficient to the extent that no allowance is made for the small unrecorded amounts used in other types of establishments.

TALLOW : CONSUMPTION IN FACTORIES, AUSTRALIA. (cwt.)

Year.	Quantity Used.	Year.	Quantity Used.
1938-39.. .. .	539,095	1949-50	1,063,194
1947-48.. .. .	946,279	1950-51	1,217,027
1948-49.. .. .	1,054,040	1951-52	1,205,307

3. **Exports of Tallow.**—Particulars of exports of edible and inedible tallow are shown in the following table for the five years 1947-48 to 1951-52 in comparison with the average for the five years ended 1938-39.

TALLOW : EXPORTS, AUSTRALIA. (cwt.)

Particulars.	Average, 1934-35 to 1938-39.	1947-48.	1948-49.	1949-50.	1950-51.	1951-52.
Edible	(a)	38,324	59,106	73,663	26,022	25,833
Inedible	606,934	68,537	142,179	348,214	260,569	126,618
Total	(a)	106,861	201,285	421,877	286,591	152,451

(a) Not available.

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

Price control on tallow now operates only in Queensland and there are no restrictions on the export of tallow to any destination from any part of Australia.