

CHAPTER XXIII.

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 the Pastoral Industry.

1. **Livestock Numbers.**—A detailed account of the various enumerations of livestock in Australia made prior to 1860 was given in previous issues of the Year Book. Since 1860, annual enumerations have been made, based, with few exceptions, on actual collections made through the agency of the State Police or by post. Particulars concerning the numbers of each of the principal kinds of livestock in Australia at decennial intervals from 1860 to 1950, and from 1954 onwards in single years, are given in the following table, and are shown continuously on the graph on page 939.

LIVESTOCK : AUSTRALIA.
(‘000.)

Year.	Horses.	Cattle.	Sheep.	Pigs.	Year.	Horses.	Cattle.	Sheep.	Pigs.
1860 ..	432	3,958	20,135	351	1940 ..	1,699	13,080	119,305	1,455
1870 ..	717	4,276	41,594	543	1950 ..	1,057	14,640	112,891	1,123
1880 ..	1,069	7,527	62,184	816	1954 ..	850	15,601	126,944	1,197
1890 ..	1,522	10,300	97,881	891	1955 ..	803	15,836	130,849	1,297
1900 ..	1,610	8,640	70,603	950	1956 ..	770	16,457	139,124	1,166
1910 ..	2,166	11,745	98,066	1,026	1956 ..	737	17,257	149,802	1,325
1920 ..	2,416	13,500	81,796	764	1957 ..	694	16,892	149,315	1,423
1930 ..	1,793	11,721	110,568	1,072	1958 ..				

While livestock numbers (particularly sheep) have increased substantially since 1860, marked fluctuations have 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 livestock attained their maxima are as follows:—Horses, 1918 (2,527,000); cattle, 1957 (17,257,000); sheep, 1957 (149,802,000); and pigs, 1941 (1,797,000).

The distribution throughout Australia of beef cattle, dairy cattle, sheep and pigs as at 31st March, 1955, was shown in the maps on pages 909–12 of Official Year Book No. 43.

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 XXIV.—Farmyard, Dairy and Bee Products.

2. **Minor Classes of Livestock.**—Statistics of the minor classes of livestock (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. Further details have been published in earlier issues of the Official Year Book.

3. **Carrying Capacity of Pastoral Holdings.**—The carrying capacity of pastoral holdings has been increased in recent years, due in some measure to the succession of good seasons experienced between 1946 and 1957. Other important factors contributing to the progressive increase over this period have been the reduction of rabbit infestation by the introduction of myxomatosis, and increased attention to pasture improvement. In the 1957–58 season, prevailing dry conditions were responsible for a slight decline in cattle and sheep numbers.

Since myxomatosis was first introduced in 1950, there has been a dramatic increase in the spread of the disease over much of Australia and in many areas the rabbit population is at the lowest level for many years.

Statistics of the area under sown grasses and clovers which have been collected on a uniform basis in all States since 1952–53 reveal that the area sown has been considerably increased. In 1957–58, the area under sown grasses and clovers (excluding native grasses)

totalled 33.7 million acres, an increase of 1.2 million acres (4 per cent.) over 1956-57 and 12.6 million acres (60 per cent.) over 1952-53. In recent years, the sowing and top-dressing of pastures has been facilitated by the increasing use of aircraft in these operations, an area of 1.6 million acres being sown and/or top-dressed in the year ended March, 1958.

4. *Value of Pastoral Production.*—(i) *Gross, Local and Net Values, 1956-57 and 1957-58.* Values of pastoral production for each State are shown for 1956-57 and 1957-58 in the following table. Further details of the source of the information and an explanation of the terms used in this compilation will be found in Chapter XXX.—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.

(£'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.	
1956-57.						
New South Wales	258,180	15,934	242,246	6,485	(b) 4,087	231,674
Victoria ..	149,880	11,918	137,962	3,207	4,872	129,883
Queensland ..	126,588	8,649	117,939	3,668	1,705	112,566
South Australia ..	69,059	3,854	65,205	880	2,232	62,093
Western Australia	56,442	3,139	53,303	2,386	3,574	47,343
Tasmania ..	13,849	716	13,133	1,965	(b) 502	10,666
Northern Territory	2,822	484	2,338	..	..	2,338
Aus. Cap. Territory	1,250	73	1,177	18	41	1,118
Australia ..	678,070	44,767	633,303	18,609	17,013	597,681

1957-58.(c)

New South Wales	191,361	14,292	177,069	14,435	(b) 4,955	157,679
Victoria ..	138,017	12,466	125,551	(d)	(d)	116,368
Queensland ..	97,102	8,351	88,751	6,720	1,730	80,301
South Australia ..	55,514	3,613	51,901	2,255	4,783	44,863
Western Australia	47,059	3,166	43,893	2,791	4,155	36,947
Tasmania ..	11,825	700	11,125	2,509	(b) 538	8,078
Northern Territory	3,472	538	2,934	..	..	2,934
Aus. Cap. Territory	731	54	677	154	48	475
Australia ..	545,081	43,180	501,901	(d)	(d)	447,645

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

(c) Subject to revision.

(d) Not available separately.

(ii) *Net Values, 1934-35 to 1957-58.* The net value of pastoral production by States and the net value per head of population for the years 1953-54 to 1957-58, together with the average for the years 1934-35 to 1938-39, are shown below.

NET VALUE OF PASTORAL PRODUCTION.(a)

Year.	N.S.W.(b)	Vic.	Q'land.	S. Aust.	W. Aust.	Tas.(b)	Australia.
NET VALUE. (£'000.)							
Average, 1934-35 to 1938-39	30,592	16,784	13,384	4,583	4,307	1,429	71,079
1953-54 ..	202,439	108,930	81,989	47,423	43,784	7,151	491,716
1954-55 ..	175,446	112,196	82,180	45,220	36,194	7,647	(c) 461,464
1955-56 ..	163,287	104,820	86,313	44,625	36,578	7,282	(c) 446,780
1956-57 ..	231,674	129,883	112,566	62,093	47,343	10,666	(c) 597,681
1957-58(d) ..	157,679	116,368	80,301	44,863	36,947	8,078	(c) 447,645

NET VALUE PER HEAD OF POPULATION.

(£ 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
1953-54 ..	59 8 11	44 19 2	63 0 11	60 6 9	69 8 5	23 2 2	55 10 7
1954-55 ..	50 14 4	45 1 10	62 0 1	56 0 0	55 15 6	24 8 8	c50 15 4
1955-56 ..	46 6 7	40 17 4	63 16 3	53 9 6	54 13 6	22 16 3	c47 19 2
1956-57 ..	64 11 4	49 3 11	81 10 10	72 1 9	69 3 3	32 14 1	c62 13 8
1957-58(d) ..	43 2 1	42 19 8	57 4 6	50 12 9	52 17 10	24 3 7	c45 18 8

(a) No deduction has been made for depreciation and maintenance. Excludes payments to wool-growers of profits from the war-time wool disposal plan. (b) No allowance has been made for costs of power, power kerosene, petrol and other oils. (c) Includes estimates for Northern Territory and Australian Capital Territory. (d) Subject to revision.

5. Indexes of Quantum and Price of Pastoral Production, 1953-54 to 1957-58.—The quantum indexes relate to gross output of farm products valued at constant prices. The quantities of each farm product produced each year have been re-valued at the unit gross value for the period 1936-37 to 1938-39. The price indexes relate to average "prices" of farm products realized in the principal markets of Australia. Average quantities of each product marketed in the period 1946-47 to 1950-51 have been used as fixed weights. For further details of the methods of calculating these indexes and of the weights used, see Chapter XXX.—Miscellaneous.

INDEXES OF QUANTUM(a) AND PRICE OF PASTORAL PRODUCTION:
AUSTRALIA.

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

Particulars.	1953-54.	1954-55.	1955-56.	1956-57.	1957-58.(b)
<i>Quantum(a) produced—</i>					
Wool	128	132	146	164	147
Other products	117	120	123	128	127
<i>Total Pastoral</i>	<i>123</i>	<i>127</i>	<i>136</i>	<i>148</i>	<i>138</i>
<i>Total per Head of Population</i>	<i>95</i>	<i>96</i>	<i>100</i>	<i>106</i>	<i>98</i>
<i>Price—</i>					
Wool	621	540	468	607	474
Other products	401	409	424	427	459
<i>Total Pastoral</i>	<i>534</i>	<i>489</i>	<i>451</i>	<i>536</i>	<i>468</i>

(a) Index of value at constant prices, i.e., quantities revalued at average unit values of base years (1936-37 to 1938-39). (b) Subject to revision.

6. **Consumption of Meats.**—The quantity of meat (including cured and canned meat) in terms of carcass weight and edible offal available for consumption in Australia in 1957–58 was 1,029,714 tons. This is equivalent to 236.7 lb. per head compared with 237.4 lb. per head in 1956–57, and an average of 253.0 lb. during the years 1936–37 to 1938–39.

Although it is not easy to obtain strictly comparable particulars for other countries, it appears from data published by the Food and Agricultural Organization of the United Nations in its *Food Balance Sheets* that in recent years consumption of meat in Australia has been at approximately one and a half times the level of that in Canada and the United States of America.

7. **Marketing of Meat.**—(i) *General.* The Australian Meat Board, consisting of representatives of producers, processors, exporters and the Commonwealth Government, is responsible for the control of all exports of Australian meat and meat products. Further information on the powers, etc., conferred on the Board under the Meat Export Control Act 1935–1953 was given on page 801 of Official Year Book No. 40.

(ii) *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 June, 1952, and of the Fifteen Year Meat Agreement (1952–67) were given on page 710 of Official Year Book No. 41 and in earlier issues.

The Fifteen Year Meat Agreement (1952–67) between the United Kingdom and Australian Governments has as its objectives the promotion of meat production in Australia enabling increased exports to be made to the United Kingdom and the provision of a satisfactory market in the United Kingdom for that meat. It covers chilled and frozen beef, frozen veal, frozen mutton and lamb, frozen cattle and sheep sundries and edible offal.

(iii) *Cessation of Bulk Purchasing.* Following the announcement in September, 1953, that the United Kingdom Ministry of Food would cease bulk purchasing of meat, arrangements were made between the Australian Meat Board and the Ministry for the reversion to private trading in the United Kingdom. The main features of the arrangements are:—

- (a) Mutton and lamb exported after 1st July, 1954, and beef, veal and pig meats exported after 1st October, 1954, direct to United Kingdom importers are to be sold on the open market under methods similar to those which applied pre-war.
- (b) The following minimum prices, to operate until 30th September, 1955, were agreed upon:—Beef and veal, 13.18d. stg. f.o.b. per lb.; lamb, 13.61d. stg. f.o.b. per lb.; and mutton, 6.05d. stg. f.o.b. per lb. The minimum prices are to be reviewed for subsequent years.
- (c) In the event of market prices for the various classifications of meat averaging below the minimum, the Ministry is to make a payment to the Australian Government corresponding to the amount of the deficiency. So as to determine the extent of any deficiency, a procedure designed to measure as accurately as possible the weighted average level of wholesale prices of Australian meat on the United Kingdom market has been agreed upon.

(iv) *Private Trading.* After eight months of open trading, the Board estimated that a deficiency payment would be received in respect of beef for the first year. In order to make arrangements for this anticipated deficiency to be passed on to the producer, the Meat Agreement (Deficiency Payments) Act was passed by the Commonwealth Government in May, 1955. Payments were to be made on the understanding that they were, or would be, reflected in the price paid to producers.

To make provision for recoupment by the Board of any overpayment, the Meat Export (Additional Charge) Act was also passed in May, 1955.

Negotiations were made in Australia during August and September, 1955, to review minimum prices and the working of the Agreement generally. The following minimum prices were fixed for the three years ended 30th September, 1958:—For beef and veal and lamb the same as for the year ended 30th September, 1955, and for mutton the average prices realized to the end of April, 1955, (approximately 5.8d. stg. per lb.). In addition, minimum beef and veal prices were fixed for the three years 1958–61 at 5 per cent. below those for the 1955–58 period. Australia was entitled to export a free quota of 10,000 tons of beef, veal, lamb and mutton to destinations other than the United Kingdom and the Colonies. Under the terms of the Agreement, provision was made for additional free quotas to be requested should depressed prices or other circumstances justify an approach of this kind. Under this arrangement, for the year ended 30th September, 1956, an additional 5,000 tons of beef for export to any destination was agreed upon.

In July and August, 1956, the annual review of the operation of the Agreement took place in London. It was agreed that Australia be entitled to export 15,000 tons of beef, veal, mutton and lamb to destinations other than the United Kingdom and Colonies during each of the meat years 1956–57 and 1957–58.

Because of a rise in beef prices in the United Kingdom, the deficiency payments made by the Board during the year ended 30th September, 1955, exceeded the sum received from the United Kingdom for the same period. In an endeavour to recoup some of this overpayment, under the terms of the Meat Export (Additional Charge) Act, a levy of one eighth of a penny per lb. was imposed on certain classes of beef exported to the United Kingdom out of stocks placed into store from 1st February to 16th April, 1956.

From 1st October, 1955, until April, 1958, beef prices in the United Kingdom were consistently below the level of the guarantee and consequently Australia "earned" deficiency payments as follows:—

Year.	Amount.
1954-55	£150,000
1955-56	£3,250,000
1956-57	£5,930,000

No deficiency payments were received in 1957-58.

The receipt of these moneys enabled the Australian Meat Board to make substantial bounty payments on beef exported to the United Kingdom. The rates of payment made during the 1954-55 and 1955-56 seasons were given on pages 888-9 of Official Year Book No. 43 and on pages 920-1 of Official Year Book No. 44 for 1956-57.

For 1958, a new "chiller" grade of export beef was introduced. Beef of the new grade, whether exported in the chilled or frozen form, received a bounty of 5d. per lb. The bounty on bone-out piece beef was increased from 4d. to 5d. per lb., and on certain classes of bone-in piece beef from 3d. to 5d. per lb. The basic rate of 3d. per lb. was maintained for other 1st and 2nd quality quarter beef.

Negotiations which commenced in June, 1958, with the United Kingdom Government resulted in agreement on the following points:—

- (1) Beef minimum prices for 3 years 1961-64 will be the 1958-61 level less 9 per cent.
- (2) Lamb minimum prices for 2 years from 1958 until 1960 will be the 1955-58 level less 5 per cent.
- (3) Minimum prices for mutton for the 2 years from 1958 to 1960 will be the 1955-58 level less 15 per cent.
- (4) Beef export free quota for the 3 years 1958 to 1961 will be a maximum of 7,500 tons a year of 1st and 2nd quality beef with no restriction as to the quantity of the lower grades that may be exported.

§ 2. Horses.

1. **Distribution throughout Australia.**—About 80 per cent. of the total number of horses in Australia are in the States of New South Wales, Queensland and Victoria. In the following table, figures are shown for each State and Territory for the years 1954 to 1958, 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.	Aust.
Average, 1935 to 1939 ..	537	355	444	198	154	31	33	1	1,753
1954 ..	280	141	273	52	49	17	37	1	850
1955 ..	258	132	267	49	47	16	33	1	803
1956 ..	247	119	261	44	46	15	37	1	770
1957 ..	235	108	255	41	45	14	38	1	737
1958 ..	221	98	243	35	44	13	40	1	695

The number of horses in Australia reached its maximum during 1918, when a total of 2,527,149 was recorded. The United States of America recorded its highest number 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 1958, the decrease in numbers has averaged 45,000 per annum.

A graph showing the number of horses in Australia from 1860 onwards appears on page 939.

The percentage distribution of the number of horses in each State and Territory for 1958 was:—New South Wales, 32; Victoria, 14; Queensland, 35; South Australia, 5; Western Australia, 6; Tasmania, 2; and Northern Territory, 6.

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 in 1957–58 amounted to only 770, valued at £338,574.

(ii) *Imports.* The few horses imported into Australia are mainly valuable stud animals from the United Kingdom and racehorses from New Zealand. The total number imported in 1957–58 was 402 valued at £408,163.

§ 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 the coastal districts of Victoria, New South Wales and southern Queensland in particular, the portion of Australia in the temperate zone which is best adapted to this industry. On the other hand, beef cattle are more widely distributed, particularly in the eastern States, and are raised in areas unsuitable for dairy cattle, such as the tropical area of northern Queensland, the Northern Territory, and 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 took 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 up to 14,441,000 in 1921. Numbers fluctuated in succeeding years, but from 1947 to 1957 there was a general upward movement to a record level of 17,257,000 in the latter year. With the onset of very dry conditions in 1958, numbers declined slightly to 16,900,000. A graph showing the number of cattle in Australia from 1860 appears on p. 939.

The numbers of cattle (beef and dairy) in the several States and Territories in each year 1954 to 1958, 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.	Aust.
Average, 1935 to 1939	3,198	1,952	6,018	331	819	262	889	9	13,478
1954	3,554	2,370	7,086	491	830	295	966	9	15,601
1955	3,461	2,456	7,238	524	861	319	969	8	15,836
1956	3,678	2,616	7,331	566	897	332	1,028	9	16,457
1957	3,911	2,765	7,462	621	957	354	1,176	11	17,257
1958	3,736	2,750	7,187	597	997	371	1,244	10	16,892

Although the proportion was not as high as it has been in some previous years, Queensland was carrying 43 per cent. of the cattle in Australia in 1958. The percentage in each State and Territory during that year was:—New South Wales, 22; Victoria, 16; Queensland, 43; South Australia, 4; Western Australia, 6; Tasmania, 2; and Northern Territory, 7.

Maps showing the distribution of beef and dairy cattle in Australia have been published in previous issues of the Official Year Book (*see* No. 43, pp. 909–10 for 1955; No. 39, pp. 905–6, for 1948; No. 34, pp. 453–4, for 1938–39; and No. 22, p. 660, for 1924–25).

3. **Classification of Cattle According to Purpose.**—Of the total number of cattle in Australia in 1958, 11,907,000 or 70 per cent. were classified as beef cattle. The numbers classified as beef cattle in the several States and Territories, during the years 1943 and 1954 to 1958, were as follows:—

BEEF CATTLE : NUMBER.

('000.)

Year.	N.S.W.	Vic.	Q'land.	S. Aust.	W. Aust.	Tas.	Nor. Terr.	Aust. Cap. Terr.	Aust.
1943	1,676	577	4,893	171	605	102	978	5	9,007
1954	2,268	829	5,703	230	600	121	966	6	10,723
1955	2,196	856	5,861	255	633	129	969	5	10,904
1956	2,341	954	5,946	302	673	148	1,028	6	11,398
1957	2,577	1,044	6,087	356	733	158	1,176	8	12,139
1958	2,429	1,026	5,917	338	771	167	1,244	6	11,898

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

Particulars relating to dairy cattle numbers will be found in Chapter XXIV.—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 1955–56 and published in full detail in a series of mimeographed bulletins, *Size Classification of Rural Holdings*, 1955–56. Condensed tables also appear in *Primary Industries, Part I*, Bulletin No. 51. The tables relating to beef and dairy cattle show classifications according to size of herd, area of holding, area of wheat for grain and area of sown pastures.

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, in general, have been compiled by the United States Department of Agriculture for publication, in *Foreign Crops and Markets* and *Foreign Agriculture Circular*, and by the Food and Agriculture Organization of the United Nations for publication in *Yearbook of Food and Agricultural Statistics: Production*, relate 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)	180,000	1956 (January) ..	203,800
United States of America	66,706	1958 (January) ..	93,967
U.S.S.R.	59,800	1957 (October) ..	70,400
Brazil	40,807	1958 (December) ..	68,000
Argentina	33,762	1957 (June) ..	44,200
China	25,600	1956 (May) ..	45,300
Pakistan(b)	33,000	1955 (January) ..	30,000
Ethiopia	18,000	1956 (July) ..	20,000
France	15,504	1958 (October) ..	17,928
Australia	13,285	1958 (March) ..	16,900
Mexico	11,716	1958 (December) ..	16,900
Colombia	8,010	1957 (January) ..	13,390
Turkey(b)	8,611	1958 (November) ..	12,706
Germany, Federal Republic of	12,114	1958 (December) ..	11,948
Union of South Africa	11,636	1955 (August) ..	11,709

(a) In some cases census for a single year, and in others an average for two to four years.

(b) Includes buffaloes.

6. *Imports and Exports of Cattle.*—The products of the cattle-raising industry figure largely in the export trade of Australia, although until recently the export of live cattle has never been large. In 1957–58, exports of cattle, mainly to the Philippines for slaughter, amounted to 23,941 valued at £933,000. The number of cattle imported is small, and as in the case of horses, consists mainly of valuable animals for stud purposes. Details for the years 1953–54 to 1957–58, compared with the average for the years 1934–35 to 1938–39, are as follows.

CATTLE : IMPORTS AND EXPORTS, AUSTRALIA.

Year	Imports.		Exports.	
	No.	Value.	No.	Value.
		£'000		£'000
Average, 1934-35 to 1938-39 ..	295	22	308	6
1953-54	153	102	1,214	95
1954-55	1,679	155	6,786	346
1955-56	304	229	8,025	475
1956-57	145	123	18,360	754
1957-58	272	174	23,941	933

The average value per head of the cattle imported during the last five years was £307 while the average value per head of the cattle exported during the same period was £45.

7. Cattle Slaughtered.—The numbers of cattle slaughtered during each of the years ended June, 1954 to 1958, 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—	Slaughterings passed for Human Consumption.									Total Slaughterings including Boiled Down.
	N.S.W.	Vic.	Qld.	S.A.	W.A.	Tas.	N.T.	A.C.T.	Aust.	
Average, 1935 to 1939	(a)1,112	812	1,046	(b)156	(b)124	45	(b)4	2	3,301	3,331
1954	1,564	1,008	1,366	220	172	62	15	8	4,415	4,475
1955	1,518	1,024	1,430	233	181	75	16	8	4,485	4,550
1956	1,547	1,023	1,502	227	191	88	25	9	4,612	4,675
1957	1,591	1,139	1,641	252	192	102	25	10	4,952	5,017
1958	1,742	1,404	1,541	282	216	118	24	12	5,339	5,411

(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.	Vic.	Qld.	S. Aust.	W.A.	Tas.	N.T.	A.C.T.	Aust.
Average 1935 to 1939	(a)173	115	181	(b)25	(b)27	9	(b)1	..	531
1954	221	140	258	34	35	11	3	2	704
1955	215	143	272	34	37	14	3	2	720
1956	222	139	292	38	38	15	5	2	751
1957	236	159	317	40	38	18	5	2	815
1958	233	181	270	41	39	20	5	2	791

(a) Year ended March.

(b) Year ended previous December.

9. Consumption of Beef and Veal.—For the three 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. Since the 1939-45 War, consumption per head of beef and veal has been at a somewhat lower level. In 1957-58 it amounted to 126.1 lb. per head, consisting of 121.2 lb. of carcass meat and 4.9 lb. of canned meat (carcass equivalent).

In the following table, details of the production and disposal of beef and veal are shown for the years 1953-54 to 1957-58, compared with the average for the three years 1936-37 to 1938-39.

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
1953-54	- 7	704	155	101	455	114.6
1954-55	+ 4	720	137	106	473	116.5
1955-56	- 7	751	163	100	495	119.1
1956-57	+ 3	815	177	84	551	129.3
1957-58	+ 4	791	159	87	541	124.4

(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 quantities and values of frozen beef and veal exported during the five pre-war years ended 1938-39 and in each year 1953-54 to 1957-58, 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.
Average, 1934-35 to 1938-39	'000 lb. 231,355	£'000. 3,188	'000 lb. 10,353	£'000. 165
1953-54	313,198	21,697	3,779	349
1954-55	271,772	21,408	4,626	491
1955-56	318,059	22,936	4,689	495
1956-57	331,255	22,863	3,391	408
1957-58	276,607	20,961	5,397	609

The largest purchaser of Australian beef and veal is the United Kingdom, which during 1938-39 took about 90 per cent. of the total shipments. In 1957-58, shipments to the United Kingdom were valued at £15,084,000 or 70 per cent. of the total value of beef and veal exports, whilst exports to other Commonwealth countries amounted to £2,645,000 or 12 per cent. of the total.

Because 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 the United Kingdom in a chilled condition. Trial shipments began in 1932-33 and exports in subsequent years increased to a maximum of 58,963,000 lb. in 1938-39. However, the 1939-45 War seriously affected the export trade in chilled beef, which declined to a negligible amount after 1939-40. In 1957-58, chilled beef exports were 14,576,000 lb. valued at £1,063,000, whilst frozen beef exports amounted to 262,031,000 lb. valued at £19,898,000.

§ 4. Sheep.

1. **Introduction of Sheep.**—The suitability of the Australian climate and general conditions for the production of a high class of wool were recognized at an early date by Captain Macarthur, one of the pioneer sheep-breeders of New South Wales. 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 sheep industry in Australia is certainly 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 940. 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 125.2 million in 1942. During the three years ended 1947, however, a sharp decline to 95.7 million occurred. This 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 steady increase in sheep numbers, which at 31st March, 1957, reached the record level of 149.8 million. Dry seasonal conditions were responsible for a slight decline to 149.3 million at 31st March, 1958.

The following table shows the approximate movement in sheep numbers in Australia in 1938–39 and 1953–54 to 1957–58.

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
1953–54.. ..	32,231	86	20,922	7,351	126,944	+ 3,872
1954–55.. ..	32,804	97	22,454	6,348	130,849	+ 3,905
1955–56.. ..	36,914	97	21,180	7,362	139,124	+ 8,275
1956–57.. ..	39,902	122	19,503	9,599	149,802	+ 10,678
1957–58.. ..	36,397	120	24,417	12,347	149,315	— 487

(a) Balance figure. (b) As at 1st January, 1939—Queensland, South Australia, Western Australia, Tasmania, Northern Territory; as at 1st March, 1939—Victoria.

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 nearly one half of the sheep of Australia.

Maps showing the distribution of sheep in Australia have been published in previous issues of the Official Year Book (see No. 43, p. 911, for 1955; No. 39, p. 907, for 1948; No. 34, p. 432, for 1938–39; and No. 22, p. 659, for 1924–25).

The numbers of sheep in the several States and Territories at 31st March of each year 1954 to 1958, compared with the average for the years 1935 to 1939, are shown in the following table:—

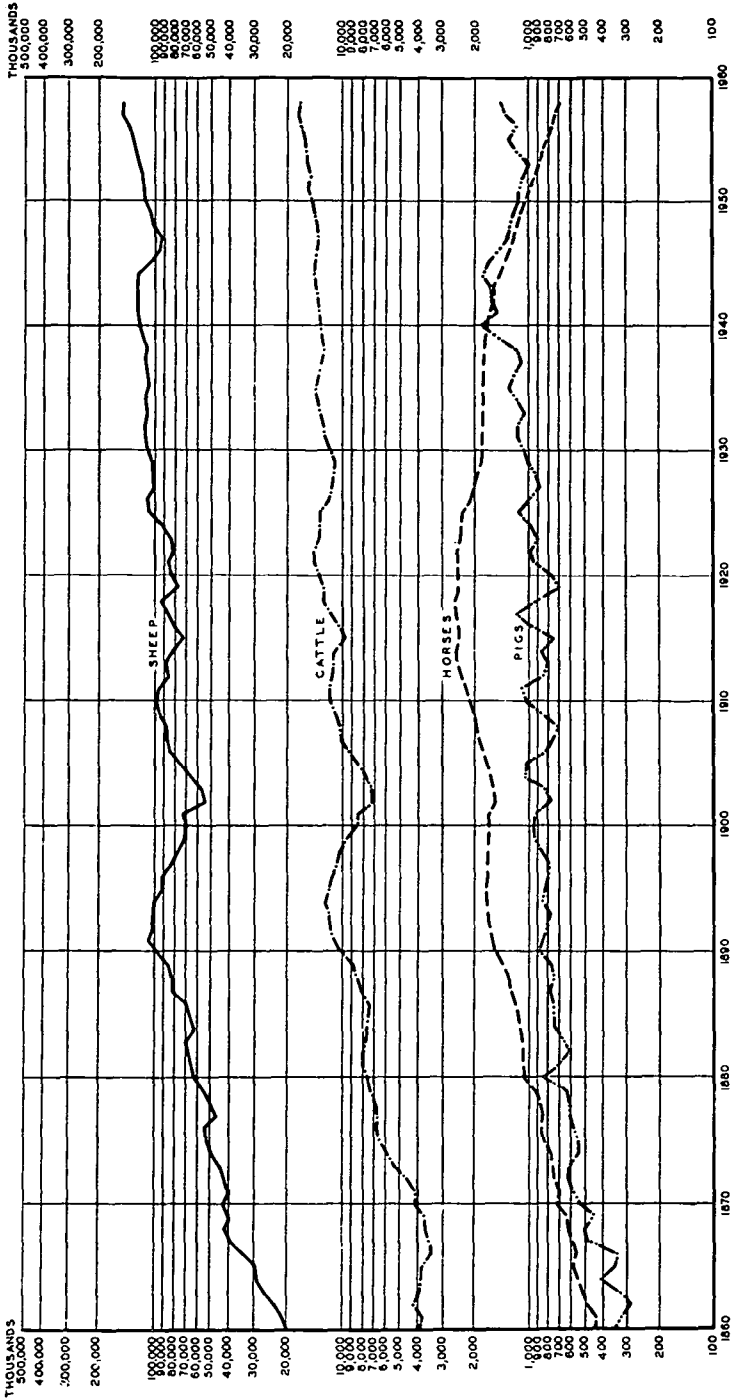
SHEEP : NUMBER.

('000.)

Year.	N.S.W.	Vic.	Q'land.	S. Aust.	W. Aust.	Tas.	Nor. Terr.	Aust. Cap. Terr.	Australia.
Average, 1935 to 1939	51,774	17,555	21,061	8,515	9,839	2,312	23	240	111,319
1954	59,639	21,438	18,194	11,838	13,087	2,465	31	252	126,944
1955	59,200	22,330	20,222	12,817	13,411	2,595	29	245	130,849
1956	62,988	23,343	22,116	13,585	14,128	2,673	33	258	139,124
1957	67,670	25,831	23,190	14,984	14,887	2,943	30	267	149,802
1958	65,410	27,090	22,274	15,236	15,724	3,298	27	256	149,315

LIVESTOCK : AUSTRALIA, 1860 TO 1958

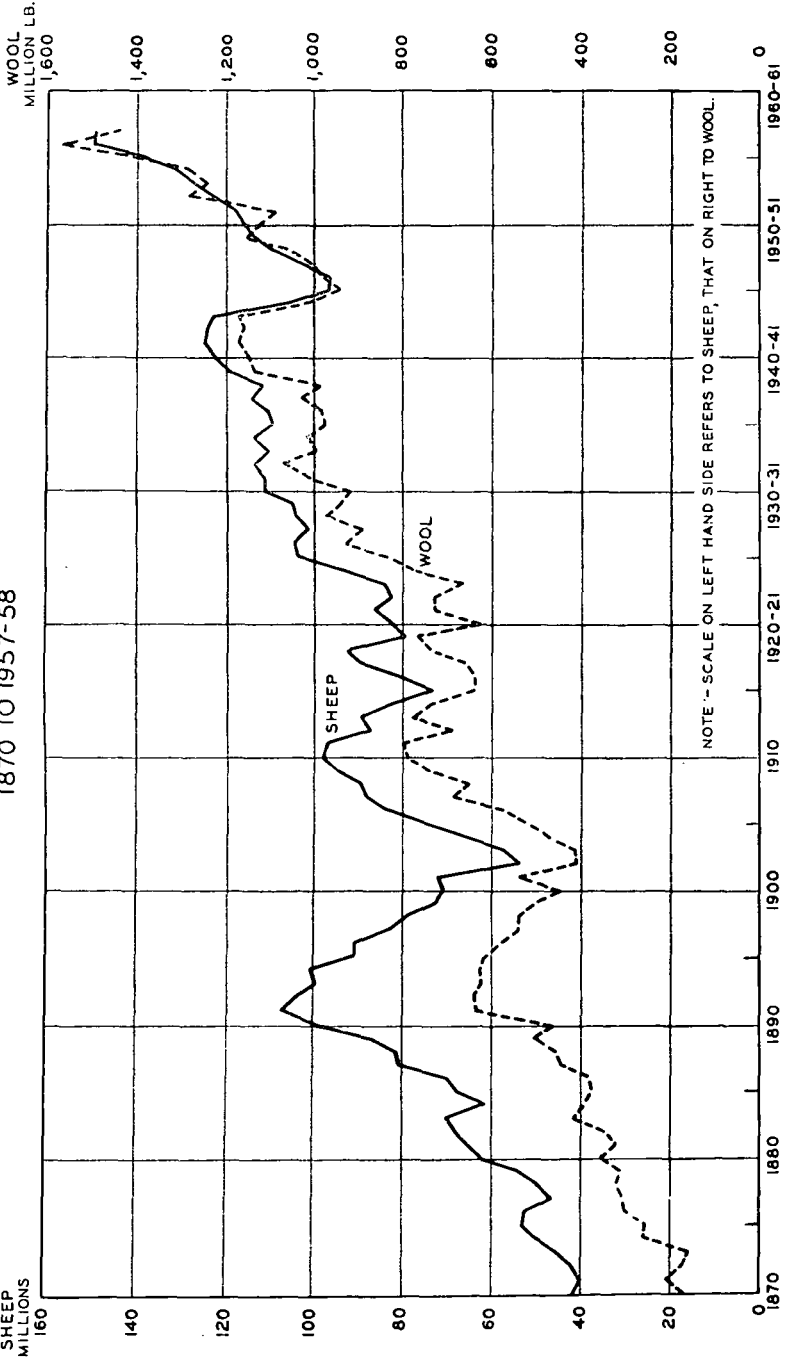
RATIO GRAPH



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 1957-58



NOTE - SCALE ON LEFT HAND SIDE REFERS TO SHEEP, THAT ON RIGHT TO WOOL.

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

The percentage distribution in 1958 was:—New South Wales, 44 ; Victoria, 18 ; Queensland, 15 ; South Australia, 10 ; Western Australia, 11 ; and Tasmania, 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 1954 to 1958.

SHEEP : AGE AND SEX, AUSTRALIA.

('000.)

Description.	31st March—				
	1954.	1955.	1956.	1957.	1958.
Rams, 1 year and over ..	1,610	1,647	1,721	1,830	1,883
Breeding ewes (including ewes intended for mating) ..	55,528	58,614	62,483	66,844	66,059
Other ewes, 1 year and over ..	8,430	7,847	7,553	8,447	9,795
Wethers, 1 year and over ..	36,069	37,645	39,142	41,573	43,688
Lambs and hoggets, under 1 year ..	25,307	25,096	28,225	31,108	27,890
Total, Sheep and Lambs	126,944	130,849	139,124	149,802	149,315

Particulars relating to the principal breeds of sheep at 31st March, 1956, the last year for which these details are available, are shown in the following table:—

SHEEP : PRINCIPAL BREEDS, 31st MARCH, 1956.

('000.)

Breed.	N.S.W.	Victoria.	Q'land.	S. Aust.	W. Aust.	Tas.	N.T.(a)	A.C.T.	Aust.
Merino ..	49,994	9,934	21,777	11,482	12,987	301	33	236	106,744
Other recognized breeds ..	3,491	5,314	71	910	439	1,345	..	13	11,583
Merino comebacks(b) ..	3,792	2,449	64	281	140	377	..	4	7,107
Crossbreeds(c) ..	5,711	5,646	204	912	562	650	..	5	13,690
Total ..	62,988	23,343	22,116	13,585	14,128	2,673	33	258	139,124

(a) As at 31st December, 1955. (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 1955–56 and published in full detail in a series of mimeographed bulletins—*Size Classification of Rural Holdings 1955–56*. Condensed tables also appear in *Primary Industries, Part I. Bulletin No. 51*. The tables relating to sheep farming show classifications according to size of flock, area of holding, area of wheat for grain and area of sown pasture.

6. **Comparison with other Countries.**—Australia has long occupied the leading position amongst the sheep raising countries of the world in respect of the size of its flocks and the quantity and quality of wool produced. In 1956–57, Australian flocks numbered 150 million sheep, compared with an estimate of 205 million for the U.S.S.R., China, and Eastern Europe, about 46 million in Argentina and about 42 million in New Zealand. The total world sheep population was estimated at about 915 million in 1956–57. Further details of sheep numbers in the principal wool producing countries of the world for 1955–56 and 1956–57 compared with the average for the period 1934–35 to 1938–39, are given in the table on page 947.

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. On 27th November, 1929, the export of stud merino sheep was prohibited, except with the approval of the Minister for Primary Industry. Exports of sheep are now principally for slaughter overseas. Consignments for this purpose in recent years were made chiefly to Singapore from Western Australia. The following table shows the imports and exports of all sheep for the years 1953–54 to 1957–58 compared with the average for the years 1934–35 to 1938–39.

SHEEP : IMPORTS AND EXPORTS, AUSTRALIA.

Year.	Imports.		Exports.	
	No.	Value.	No.	Value.
		£'000.		£'000.
Average, 1934–35 to 1938–39 ..	3,795	30	65,188	67
1953–54	247	14	86,526	304
1954–55	232	13	97,146	340
1955–56	4,437	89	101,837	332
1956–57	7,445	212	129,480	482
1957–58	2,256	90	122,628	466

8. **Sheep Slaughtered.**—The following table shows the numbers of sheep slaughtered in the several States during each of the years ended June, 1954 to 1958, compared with the average for the years ended June, 1935 to 1939:—

SHEEP (INCLUDING LAMBS) SLAUGHTERED.

(‘000.)

Year.	Slaughterings Passed for Human Consumption.									Total Slaughterings including Boiled Down.
	N.S.W.	Vic.	Qld.	S.A.	W.A.	Tas.	N.T.	A.C.T.	Aust.	
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
1953–54	7,360	7,709	1,081	2,637	1,545	594	3	63	20,992	21,065
1954–55	7,318	8,714	1,009	2,799	1,673	643	3	74	22,233	22,303
1955–56	6,840	7,860	1,186	2,358	1,796	645	2	73	20,760	20,797
1956–57	6,951	7,038	1,270	2,329	1,907	684	2	66	20,247	20,310
1957–58	7,761	9,624	1,378	3,278	1,856	734	4	74	24,709	24,878

(a) Average, years ended March.

(b) Average, years ended December 1934 to 1938.

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.	Aust.
Average, 1934–35 to 1938–39 ..	103,706	135,149	20,166	29,710	20,476	6,035	1	396	315,639
1953–54	124,530	135,622	19,692	45,471	27,266	11,073	72	1,086	364,812
1954–55	122,499	155,611	18,550	49,853	28,413	11,901	78	1,259	388,164
1955–56	120,615	146,228	23,020	44,339	32,759	11,778	59	1,333	380,131
1956–57	121,947	131,253	23,866	42,563	33,303	12,607	49	1,198	366,786
1957–58	127,800	169,107	24,381	53,681	31,942	13,221	90	1,254	421,476

10. **Consumption of Mutton and Lamb.**—For the three years 1936–37 to 1938–39, the annual production of mutton and lamb averaged 319,000 tons of which 88,900 tons were exported leaving a balance of 230,100 tons (or the carcass equivalent of 74.8 lb. per head per annum) available for consumption.

Civilian consumption of mutton and lamb (in carcass equivalent weight including that used for canning) during the 1939–45 War rose substantially, but fell again in 1946–47 and up to 1951–52 was lower than in pre-war years. It rose during succeeding years to a level of 78 lb. per head in 1952–53 which has since been maintained except for a slight drop recorded in 1955–56 and 1956–57.

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 Dehydra- tion.	Consumption in Australia.	
					Total.	Per Head per Annum. (lb.)
MUTTON.						
Average 1936–37 to 1938–39 ..	..	201	17	..	184	59.8
1953–54	— 7	238	25	16	204	51.4
1954–55	— 1	240	15	15	211	52.1
1955–56	— 1	234	15	16	204	49.1
1956–57	+ 2	224	10	13	199	46.8
1957–58	+ 1	261	19	24	217	49.8
LAMB.						
Average 1936–37 to 1938–39 ..	..	118	72	..	46	15.0
1953–54	+ 1	127	19	..	107	26.9
1954–55 .. .. .	..	148	42	..	106	26.0
1955–56 .. .. .	..	145	36	..	109	26.2
1956–57	+ 1	143	24	..	118	27.7
1957–58	— 1	150	29	..	122	28.0

11. **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. It declined in subsequent years and it was not until 1942–43 that it almost reached this level again. 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. Exports, however, have fallen again since 1942–43 and in 1957–58 amounted to only 106,622,000 lb., consisting of 64,352,000 lb. lamb and 42,270,000 lb. mutton.

The quantities and values of exports of frozen mutton and lamb in each year 1953–54 to 1957–58 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.	'000 lb.	£'000.	'000 lb.	£'000.
Average, 1934-35 to 1938-39 ..	40,584	656	153,606	4,208	194,190	4,864
1953-54	55,590	1,964	44,102	3,298	99,692	5,262
1954-55	33,811	1,626	94,982	10,191	128,793	11,817
1955-56	34,657	1,885	81,626	7,867	116,283	9,752
1956-57	23,012	1,322	53,262	4,773	76,274	6,095
1957-58	42,270	2,253	64,352	6,132	106,622	8,384

As with beef, the principal customer in this trade is normally the United Kingdom. In 1957-58, exports of mutton and lamb to this country represented 58 per cent. and 86 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, (29 per cent. in 1957-58) and about half of the total fine-quality merino wool. The bulk of the production is exported, mainly as greasy wool, although substantial amounts of scoured and carbonized wool, wool on sheep skins and small quantities of semi-manufactured wool are also shipped. The remainder, which is used by Australian manufacturers, has amounted to only five per cent. of the total production (greasy basis) in recent years.

The important position held by Australia among the principal sheep and wool producing countries of the world is shown in the table on page 947.

2. **Greasy and Scoured Wool.**—Whether the weight of the wool clip should be stated as "in the grease" or as "clean" is a matter which seriously affects comparisons between the clips of different seasons and of different countries. The quantity of grease and other 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.

From 1946-47 to 1952-53, the Australian Wool Realization Commission, and from 1953-54, the Wool Statistical Service, has assessed annually the clean yield of the Australian wool clip. Apart from a slight fall in 1953-54 when the yield fell to 55.7 per cent. from 57.5 per cent. in the previous year, a steady increase in the yield of clean from greasy wool was maintained from 1946-47 to 1956-57. In 1957-58, however, another fall occurred, the yield being 56.7 per cent. compared with 57.7 per cent. in 1956-57. A standard factor of 93 per cent. is taken as the clean yield of Australian scoured wools.

Wool scoured, washed and carbonized in Australia before export, however, has a clean yield somewhat lower than for the whole clip, because the grade of greasy wool treated locally for export as scoured, washed or carbonized includes a large proportion of dirty and low-grade wool. In recent years, it has approximated 53 per cent. The quantity of this wool exported during 1957-58 was approximately 13 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. In recent years, approximately 3 per cent. has been obtained by fellmongering and about 5 per cent. has been 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 1953-54 to 1957-58 compared with average production for the five years ended 1938-39. Particulars of the gross value of wool produced are based, for shorn wool, upon the average price realized for greasy wool sold at auction, and for skin wools, on prices recorded by fellmongers and skin exporters.

WOOL: TOTAL PRODUCTION (IN TERMS OF GREASY).

Particulars.	Average, 1934-35 to 1938-39.	1953-54.	1954-55.	1955-56.	1956-57.	1957-58.
	'000 lb.	'000 lb.	'000 lb.	'000 lb.	'000 lb.	'000 lb.
New South Wales ..	480,670	544,934	540,977	593,712	660,343	557,287
Victoria ..	165,586	223,481	253,364	273,356	299,572	296,490
Queensland ..	164,971	174,414	176,548	194,014	227,664	204,375
South Australia ..	85,120	145,509	155,761	173,697	188,808	185,843
Western Australia ..	81,543	134,442	129,662	156,454	156,402	158,281
Tasmania ..	15,504	20,116	23,797	23,418	28,663	29,154
Northern Territory(a) ..	35	290	311	393	346	291
Australian Capital Territory ..	1,827	2,276	2,232	2,328	2,457	2,133
<i>Australia—</i>						
Shorn (including Crutchings) ..	888,677	1,138,108	1,173,906	1,303,944	1,457,387	1,319,941
Dead and Fellmongered	50,396	47,000	44,417	44,051	37,724	30,894
Exported on Skins ..	56,183	60,354	64,329	69,377	69,144	83,019
<i>Total—Quantity ..</i>	<i>995,256</i>	<i>1,245,462</i>	<i>1,282,652</i>	<i>1,417,372</i>	<i>1,564,255</i>	<i>1,433,854</i>
	£'000.	£'000.	£'000.	£'000.	£'000.	£'000.
.. <i>Value ..</i>	<i>51,182</i>	<i>409,768</i>	<i>367,138</i>	<i>354,064</i>	<i>507,615</i>	<i>(b)362,683</i>

(a) Estimated. (b) 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 in the Australian Capital Territory are shown in the following table for each season 1953-54 to 1957-58 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)	1953-54.	1954-55.	1955-56.	1956-57.	1957-58.
SHEEP.						
New South Wales ..	8.87	9.53	9.32	10.01	9.92	8.45
Victoria ..	7.84	9.04	9.83	10.41	11.02	9.69
Queensland ..	7.98	9.87	9.23	9.96	9.98	8.93
South Australia ..	10.06	11.72	11.86	12.68	13.14	11.60
Western Australia ..	8.53	10.53	9.76	11.33	10.73	10.54
Tasmania ..	7.62	8.13	9.31	8.85	10.07	9.38
Australian Capital Territory ..	8.32	9.38	9.03	9.75	10.20	8.28
<i>Australia(b) ..</i>	<i>8.57</i>	<i>9.78</i>	<i>9.69</i>	<i>10.45</i>	<i>10.51</i>	<i>9.30</i>
LAMB.						
New South Wales ..	2.75	3.02	2.90	3.11	3.30	2.75
Victoria ..	2.14	2.53	2.62	2.78	3.11	2.71
Queensland ..	2.89	3.66	3.61	4.18	4.09	3.76
South Australia ..	2.57	3.35	3.29	3.92	4.11	3.37
Western Australia ..	2.57	2.79	2.50	2.88	2.78	2.77
Tasmania ..	1.37	2.04	2.14	2.36	2.46	2.40
Australian Capital Territory ..	1.11	1.31	1.16	1.33	1.52	1.19
<i>Australia(b) ..</i>	<i>2.57</i>	<i>2.97</i>	<i>2.91</i>	<i>3.22</i>	<i>3.37</i>	<i>2.91</i>

(a) Mean of average weights in each season. (b) Excludes Northern Territory.

6. **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. From the resumption of auctions in 1946–47 to 23rd October, 1953, this analysis was continued by the Australian Wool Realization Commission and from 23rd October, 1953, by the Wool Statistical Service, but the basis of the data has been changed to the catalogues of auction sales, and not upon appraisal as previously. The following table provides a detailed analysis of wool sold at auction according to quality, for the years 1953–54 to 1957–58. "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 1 lb. 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 1 lb. of tops (combed wool) of that particular wool.

CLASSIFICATION OF GREASY WOOL SOLD AT AUCTION(a) : AUSTRALIA.

(Bales of approximately 300 lb.)

Pre-dominating Quality.	1953-54.		1954-55.		1955-56.		1956-57.		1957-58.	
	Quantity.	Per cent.	Quantity.	Per cent.	Quantity.	Per cent.	Quantity.	Per cent.	Quantity.	Per cent.
70's and finer	98,307	2.7	95,055	2.5	86,925	2.1	100,011	2.1	114,188	2.7
64/70's ..	441,906	12.0	415,012	10.9	424,946	10.2	527,264	11.1	609,897	14.3
64's ..	612,776	16.6	595,519	15.6	583,929	14.0	690,038	14.5	696,064	16.4
64/60's ..	357,936	9.7	376,607	9.9	390,633	9.4	478,418	10.1	392,933	9.2
60/64's ..	702,871	19.1	752,490	19.7	833,228	20.0	987,496	20.8	847,824	19.9
60's and 60/58's	596,709	16.2	641,970	16.8	746,019	17.9	804,363	16.9	645,119	15.2
Total 60's and finer	2,810,505	76.3	2,876,653	75.4	3,065,680	73.6	3,587,590	75.5	3,306,025	77.7
58's ..	377,931	10.2	416,419	10.9	503,868	12.1	502,566	10.6	435,436	10.2
56's ..	293,926	8.0	312,055	8.2	350,219	8.4	376,660	7.9	297,662	7.0
50's ..	123,609	3.3	125,878	3.3	146,640	3.5	162,533	3.4	116,329	2.7
Below 50's ..	41,907	1.1	42,523	1.1	47,505	1.1	50,055	1.0	38,514	0.9
Oddments ..	39,212	1.1	44,209	1.1	53,747	1.3	74,226	1.6	65,348	1.5
Grand Total	3,687,090	100.0	3,817,737	100.0	4,167,659	100.0	4,753,630	100.0	4,259,314	100.0

(a) All greasy wool sold at auction except "wool re-offered account buyer".

7. **World Sheep Population and Wool Production.**—The following table shows particulars of the sheep population and 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 the latest available years compared with pre-war years. The data have been taken from reports published by the Commonwealth Economic Committee compiled from questionnaires prepared by the Committee and the International Wool Textile Organization and from other official sources.

In 1957–58, Australia produced 29 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 New Zealand with 10 per cent. of the world total, Argentina, 8 per cent., United States of America, 6 per cent., and Union of South Africa, 6 per cent. Production in the U.S.S.R., China, and Eastern European countries together amounted to 17 per cent. World production of wool (all types) in 1957–58 was about 1,200 million lb. (32 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. is largely of the carpet type. World production of merino wool in 1957–58 was 21 per cent. above the average for 1934–38, and the production of crossbred types has risen by about 57 per cent. Carpet wool production has risen by about 16 per cent.

ESTIMATED WORLD SHEEP POPULATION AND PRODUCTION OF WOOL.

Country and Type.	Sheep Numbers ('000,000).			Wool Production ('000,000 lb.— in terms of greasy).		
	Average 1934-35 to 1938-39.	1955-56.	1956-57.	Average, 1934-38.	1956-57.	1957-58. (a)
<i>British Commonwealth—</i>						
Australia	111.6	139.1	149.8	995	1,564	1,433
New Zealand	30.2	40.3	42.4	299	491	496
South Africa (b)	38.6	38.0	38.0	261	321	299
Other Commonwealth	97.6	93.6	94.8	230	225	232
<i>Total</i>	<i>278.0</i>	<i>311.0</i>	<i>325.0</i>	<i>1,785</i>	<i>2,601</i>	<i>2,460</i>
<i>Foreign—</i>						
U.S.S.R., China, Eastern Europe (c)	126.0	200.0	205.0	435	829	892
Argentina	41.0	45.2	45.7	376	388	409
United States of America	52.5	31.3	30.8	470	307	293
Uruguay	18.0	23.0	24.0	114	190	200
Other Foreign	221.5	284.5	284.5	608	764	765
<i>Total</i>	<i>459.0</i>	<i>584.0</i>	<i>590.0</i>	<i>2,003</i>	<i>2,478</i>	<i>2,559</i>
<i>Grand Total</i>	<i>737.0</i>	<i>895.0</i>	<i>915.0</i>	<i>3,788</i>	<i>5,079</i>	<i>5,019</i>
Type of Wool.						
<i>Apparel Type—</i>						
Merino				1,579	2,040	1,960
Crossbred				1,265	1,920	1,915
Carpet type				944	1,119	1,144

(a) Provisional. (b) Basutoland and S.W. Africa Territory excluded from sheep population, but included in wool production. (c) Comprising U.S.S.R., Poland, Czechoslovakia, Hungary, Romania, Bulgaria, Eastern Germany, Albania, China and Dependencies, Outer Mongolia and Tibet.

8. 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.

9. Australian Wool Realization Commission.—The Australian Wool Realization Commission was the Australian subsidiary of a Joint Organization (commonly referred to as "J.O.") set up by the Governments of the United Kingdom, the Commonwealth of Australia, the Dominion of New Zealand and the Union of South Africa, under the title of "U.K.—Dominion Wool Disposals Limited" to dispose of accumulated war-time stocks of Dominion wool held by the United Kingdom Government at the end of the war. Details of the functions and operations of these organizations appear in earlier issues of the Year Book, particularly No. 38, pages 919-923.

By the end of 1951, the Joint Organization had disposed of all stocks of wool held and shortly after it went into voluntary liquidation. Liquidation proceedings were completed on 15th February, 1954.

Australia's share of the profits arising from the operations of J.O. amounted to approximately £93 million (including interest). The task of distributing the profits to growers was entrusted to the Australian Wool Realization Commission and up to May, 1956, all but £2.5 million of the total value of the profits, plus a small amount representing mainly unclaimed moneys, had been distributed to growers.

The distribution of the remaining £2.5 million was held up by the protracted litigation known as the "Poulton Case". The moneys concerned represented the profits on wool which was submitted by growers for wartime appraisalment through dealers. Mr. Poulton, a dealer, sought to establish the right of the dealers to these profits, but the High Court

ruled against him on two occasions. The decision of a single High Court judge was given in November 1953, and the unanimous decision of the Full High Court was given in December, 1953. However, as the possibility existed that Mr. Poulton might seek leave to appeal to the Privy Council against the High Court's decision, the Government withheld distribution for that reason. By May, 1956, Mr. Poulton had not taken any action to seek leave to appeal to the Privy Council and the Government, after consulting its legal advisers, decided to distribute the profits to the growers. The Commission has now almost completed this task.

10. *Australian Wool Bureau.*—(i) *General.* The Australian Wool Bureau was constituted under the Wool Use Promotion Act 1953 and replaced the Australian Wool Board which was established in 1936. The Bureau's main function is to promote the use of wool by publicity and other means in Australia and overseas.

The Bureau consists of seven members appointed by the Governor-General for a term of three years. Of the seven members, three represent the Australian Wool and Meat Producers' Federation, three the Australian Woolgrowers' Council and the other member is nominated by the Commonwealth Government.

Particulars of the activities of the Bureau are given in para. 12, Wool Publicity and Research.

(ii) *Wool Statistical Service.* The Wool Statistical Service, formerly conducted by the Australian Wool Realization Commission, was taken over by the Australian Wool Bureau on 23rd October, 1953. The Statistical Service is responsible for the preparation and publication of statistical material relating to the Australian wool market and the composition of the Australian clip and other special statistical work which may be assigned to it.

It is financed out of the income received by the Australian Wool Bureau from wool stores under its control and from an annual contribution by the Commonwealth Government.

A Statistical Service Committee, consisting of the representatives of the Australian Wool Bureau, the Commonwealth Government, wool buyers, wool growers and wool selling brokers' organizations, acts in an advisory capacity to the Australian Wool Bureau.

(iii) *Wool Stores.* Some three hundred wool stores, formerly the property of the Joint Organization and purchased from it by the Commonwealth Government, were transferred to the ownership of the Australian Wool Bureau by virtue of the Wool Stores Act 1953. The Bureau formally assumed control of these stores on 11th January, 1954, and at the same time received a substantial sum of money representing accumulated rentals and receipts from sales which had come to hand whilst the stores were held by the Commonwealth Government. Under the Act, the Bureau may only dispose of these stores with the permission of the Minister for Primary Industry and, in the event of war, may be required to return the stores without compensation to the Commonwealth Government. The stores are let by the Wool Bureau as a commercial proposition. The rental income is used to meet the expenses of maintaining, managing and insuring the stores, to defray the cost of operating the Wool Statistical Service and to help finance the wool promotion activities of the Bureau.

(iv) *The Contributory Charge.*—Associated legislation, namely, 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 woolgrowers on all shorn wool produced in Australia and sold after a date fixed by proclamation. 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. Further particulars of the Wool Contributory Charge and the amounts collected appear in Year Book No. 40, pages 675 and 819.

(v) *The Wool Levy.* While the contributory charge legislation, mentioned above, was in force, the Wool Levy, which was imposed by the Wool Tax Act 1936 and the Wool Tax Assessment Act 1936, was temporarily suspended. When the Wool Levy was first imposed in 1936, the rate of tax on woolgrowers was 6d. per bale on all shorn wool produced in Australia and sold. The proceeds were paid into the Wool Publicity and Research Fund administered by the Australian Wool Board.

When collection of the contributory charge ceased, (i.e., from July 1st, 1952), the Wool Levy again became operative but at a higher rate. This rate was provided for in the Wool Tax Acts (Nos. 1 and 2) of 1952 under which a rate was prescribed between limits of 2s. and 5s. per bale of shorn wool produced in Australia and sold.

Since 1952-53, the rate prescribed has been 4s. per bale. The Wool Tax Acts (Nos. 1 and 2) of 1952 were repealed in May, 1957 and replaced by the Wool Tax Acts (Nos. 1 and 2) of 1957. The 1957 Acts maintained the levy on woolgrowers for wool promotion within the limits of 2s. to 5s. per bale on shorn wool produced in Australia and sold. In addition, provision was made under the 1957 Acts for woolgrowers to be levied at a maximum rate of 2s. per bale for wool research. The operative rates prescribed are 4s. per bale for wool promotion purposes and 2s. per bale for wool research.

11. 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 rejected at a referendum of woolgrowers in Australia in September, 1951, may be found in Official Year Book No. 39, page 925.

(ii) *Subsidy on Woollen Goods, 1950-51.* Details of the subsidy paid on woollen goods manufactured for consumption in Australia from wool sold during the 1950-51 season will be found in Official Year Book No. 41, page 727.

12. Wool Publicity and Research.—(i) *Wool Use Promotion.* The Wool Use Promotion Act 1953-1957, defines the powers and functions of the Australian Wool Bureau as including measures for promoting, by publicity or other means, the use of wool in Australia or in other countries.

The Bureau is authorized also to take measures for improving the production of wool in Australia and encouraging research directed to the promotion of the use of wool.

The Bureau is associated with the New Zealand Wool Board and the South African Wool Board in maintaining the International Wool Secretariat, which was established in 1937 with head-quarters in London and with branches in fourteen countries. The function of the Secretariat is to promote the use of wool through a broad programme of publicity, education and research.

The activities of the Australian Wool Bureau are financed from the Wool Use Promotion Fund into which are paid the proceeds of the Wool Levy, and contributions from the rental income of the wool stores as mentioned in 10 (iii) above.

(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 Primary Industry. The economic research work falls into two main categories, namely, 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.

To finance the research programme, the Wool Research Trust Account was established under the Wool Use Promotion Act in 1945. Originally, a sum equal to the amount raised by the Wool Levy was paid annually into this account from Consolidated Revenue. The Wool Use Promotion Act 1953-57 fixed the rate of contribution at 2s. for each bale of shorn wool produced in Australia and sold, as from 1st July, 1952.

In addition, finance was available for research from the Wool Industry Fund. This Fund was established in 1946 from various moneys accumulated by the Central Wool Committee in war-time.

Under the Wool Research Act 1957, these sources of income together with an increased Government contribution totalling 4s. a bale, effective from 1st July, 1957, and a contribution of 2s. a bale from woolgrowers, effective from 1st July, 1957, collected under the Wool Tax Acts 1957, were combined into one fund known as the Wool Research Trust Fund. The use of this Fund is limited to sheep and wool research and expenditure therefrom is based on the recommendations of the Wool Research Committee. This committee comprises representatives of the C.S.I.R.O., the Universities, the Department of Primary Industry and other interested bodies.

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

(iii) *The Australian Wool Testing Authority.*—The Australian Wool Testing Authority Act 1957 assented to on 12th September, 1957, constituted the Australian Wool Testing Authority, comprised of representatives of wool buyers, wool selling brokers, wool processors, the Australian Wool Bureau, the C.S.I.R.O. and the Commonwealth Government. It is intended that ultimately the Authority should be self-financing, but during the preliminary stages, the Commonwealth Government is providing the initial capital by way of a loan.

The function of the Authority is to provide a service in Australia for carrying out various tests on wool and wool products, particularly with regard to the moisture content of scoured and carbonized wool. Testing on a commercial basis commenced in September, 1958.

In February, 1959, the Authority was notified by the International Wool Textile Organization that it would be included in the organization's list of official wool testing establishments. This is the standard of international recognition for wool testing houses and gives the Australian Wool Testing Authority the same standing as similar organizations in other countries.

13. *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 used on the woollen and worsted systems and by felt manufacturers in Australia, are shown below for the years 1938–39 and 1953–54 to 1957–58.

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
1953–54..	88,106	8,376	96,482	52,975	3,979	56,954
1954–55..	82,923	7,552	90,475	48,930	3,587	52,517
1955–56..	92,374	7,586	99,960	54,847	3,603	58,450
1956–57..	108,255	5,218	113,473	65,504	2,479	67,983
1957–58..	103,742	6,520	110,262	62,774	3,097	65,871

(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" provides a more reliable indication of wool consumption in Australia, as allowance has been made for exports of wool in semi-processed form. This series is shown below for the years 1938–39 and 1953–54 to 1957–58. 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, 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 estimating accurately 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)(b)	Woollen Yarn Used. (b)	Scoured Wool used for Felt Manufacture (including Hats).	Total.	Worsted Yarn Used. (a)(b)	Woollen Yarn Used. (b)	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
1953-54 ..	44,698	28,639	8,376	81,713	26,245	17,650	3,979	47,874
1954-55 ..	41,056	26,599	7,552	75,207	23,775	16,299	3,587	43,661
1955-56 ..	43,041	27,837	7,586	78,464	25,176	17,014	3,603	45,793
1956-57 ..	44,325	30,093	5,218	79,636	26,172	18,737	2,479	47,388
1957-58 ..	41,930	32,160	6,520	80,610	24,804	20,160	3,097	48,061

(a) Includes hand knitting yarns used except in 1938-39. (b) Includes wool content of yarns containing a mixture of wool and other fibres.

14. 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, 42 per cent. of total shipments were sent to the United Kingdom, other important consignees being France, 20 per cent., Belgium, 13 per cent., and Japan, 9 per cent. During the 1939-45 War, exports to the United States of America showed great expansion but have since dwindled to about 3 per cent. Of the total shipments in 1957-58, 23 per cent. went to the United Kingdom, 19 per cent. to Japan, 17 per cent. to France, 12 per cent. to Italy and 9 per cent. to Belgium-Luxemburg. The following table shows the quantities of greasy wool exported, and the principal countries of recorded destination.

EXPORTS OF GREASY AND SLIPE WOOL.

('000 lb. actual weight.)

Country to which Exported.	Average, 1934-35 to 1938-39.	1953-54.	1954-55.	1955-56.	1956-57.	1957-58.
United Kingdom ..	288,450	286,509	299,571	275,573	306,504	251,305
Other Commonwealth Countries ..	2,188	9,672	9,973	9,315	12,246	8,643
Belgium-Luxemburg ..	108,120	87,814	90,078	93,668	105,963	102,197
France ..	100,511	162,536	159,764	199,797	215,150	179,480
Germany, Fed. Rep. of..	(a) 36,856	52,974	64,779	74,945	82,897	66,117
Italy ..	21,730	114,354	89,457	93,266	123,438	130,062
Japan ..	131,305	95,121	124,718	189,852	233,036	203,988
United States of America	25,739	62,889	58,962	48,059	37,454	21,235
Other Foreign Countries	47,981	118,154	65,371	82,347	92,509	119,279
Total ..	762,880	990,023	962,673	1,066,822	1,209,197	1,082,306

(a) Pre-war Germany.

(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.

EXPORTS OF WOOL—SCOURED AND WASHED AND CARBONIZED.
(*000 lb. actual weight.)

Country to which Exported.	Average, 1934-35 to 1938-39.	1953-54.	1954-55.	1955-56.	1956-57.	1957-58.
United Kingdom ..	32,826	28,111	26,227	24,303	24,298	19,525
Canada ..	2,394	4,093	4,120	5,356	3,220	3,901
Other Commonwealth Countries ..	939	1,709	1,098	1,285	1,538	1,857
Belgium-Luxemburg ..	8,224	6,098	5,127	3,601	4,017	2,734
France ..	9,301	7,890	5,994	5,309	6,243	6,205
Germany, Fed. Rep. of ..	(a) 3,007	5,594	5,818	8,329	10,583	12,252
Italy ..	361	6,314	4,657	6,017	7,671	7,405
Japan ..	736	1,699	836	2,428	3,943	720
United States of America ..	668	9,141	16,866	16,919	13,294	13,575
Other Foreign Countries ..	5,756	10,119	11,476	11,397	15,928	20,068
Total ..	64,212	80,768	82,219	84,944	90,737	88,242

(a) Pre-war Germany.

(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.
(*000 lb. actual weight.)

Particulars.	Average, 1934-35 to 1938-39.	1953-54.	1954-55.	1955-56.	1956-57.	1957-58.
Tops ..	5,948	4,970	5,911	11,107	14,949	16,921
Noils ..		3,722	3,625	4,507	4,578	3,298
Waste—Soft wool ..		3,705	2,238	7,094	14,697	3,484
Hard wool ..		3,272	3,928	3,617	4,428	3,195

(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 1953-54 to 1957-58.

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

Particulars.	1938-39.	1953-54.	1954-55.	1955-56.	1956-57.	1957-58.
GREASY BASIS.						
<i>Raw Wool—</i>						
Greasy and Slips ..	795,728	990,023	963,583	1,067,654	1,209,840	1,082,724
Scoured and Washed and Carbonized ..	137,391	155,620	154,838	158,774	171,848	167,125
Exported on Skins ..	58,187	60,354	64,329	69,377	69,144	83,036
Total ..	991,306	1,205,997	1,182,750	1,295,805	1,450,832	1,332,885
<i>Semi-processed Wool—</i>						
Tops ..	10,124	8,946	10,403	19,993	27,058	30,627
Yarn ..	58	189	229	123	149	158
Total ..	1,001,488	1,215,132	1,193,382	1,315,921	1,478,039	1,363,670
CLEAN BASIS.						
Raw Wool ..	(a)	676,033	667,347	741,653	841,371	760,295
Semi-processed Wool ..	5,071	5,376	6,160	11,510	16,080	18,195
Total ..	(a)	681,409	673,507	753,163	856,451	778,490

(a) Not available.

(v) *Total Value of Exports.* The value of wool (other than wool on sheepskins) exported from Australia during the five years ended 1957-58 averaged 48 per cent. of the total value of exports of merchandise of Australian origin, and during 1957-58 the proportion was 47 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(a).
(£'000.)

Country to which Exported.	Average, 1934-35 to 1938-39.	1953-54.	1954-55.	1955-56.	1956-57.	1957-58.
United Kingdom ..	19,235	117,718	107,917	83,096	117,372	79,582
Other Commonwealth Countries ..	705	6,901	6,839	8,060	9,920	8,026
Belgium-Luxemburg ..	5,863	27,522	25,620	21,391	29,608	22,130
France ..	5,618	58,448	50,473	53,388	73,494	52,831
Germany, Fed. Rep. of (b)	2,603	21,936	22,926	23,603	32,987	24,592
Italy ..	1,340	47,323	32,379	29,259	47,905	41,703
Japan ..	7,727	43,685	46,077	64,761	103,770	74,301
United States of America	2,247	30,239	29,801	21,636	20,705	12,864
Other Foreign Countries	3,429	56,661	31,076	32,335	47,964	57,368
Total ..	48,767	410,433	353,108	337,529	483,725	373,397

(a) Excludes wool exported on sheepskins.

(b) Pre-war Germany.

15. *Local Sales of Wool.*—Auction sales are conducted at Sydney, Goulburn, Newcastle, Albury, Melbourne, Geelong, Ballarat, Brisbane, Adelaide, Perth, Albany, 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.

16. *Stocks of Wool.*—Stocks of raw wool held in Australia at 30th June, 1958 amounted to 210.4 million lb. (as in the grease) of which 65.5 million lb. (41.4 million lb. as greasy and 24.1 million lb. as scoured and carbonized) were held by woollen mills, wool scourers and fellmongers and 144.9 million lb. assumed to be all greasy were held by brokers. Of the wool held by brokers, 32.3 million lb. were unsold wool and 112.6 million lb. were sold wool held awaiting shipment. These stocks exclude wool on skins, since this wool is not recorded as production until fellmongered in Australia or exported on skins.

Stocks at 30th June, 1957, were 211.8 million lb. including 136.0 million lb. of sold wool. Prior to 30th June, 1957, no information was available about the stocks of sold wool held by brokers. During the war and post-war years up to 1951, raw wool stocks were exceptionally high because of the large quantities held in Australia by the Australian Wool Realization Commission on account of Joint Organization. They reached a maximum in 1945, but declined in each successive year to 1952, by which time all Joint Organization stocks had been sold.

17. *Price.*—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 five years ended 1957-58, the price of greasy wool sold in the selling centres of Australia averaged 71.1d. per lb. compared with 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.

As indicated in para. 8 above, the price of wool during the 1939-45 War was determined by the British Government wool contract. With the return to auction sales since 1945-46, the average price of greasy wool sold rose rapidly from the contract price of 15.45d. per lb. applicable in 1945-46 to the unprecedented level of 144.19d. per lb. in 1950-51. This was followed by a sharp fall and prices, in the years 1951-52 to 1957-58, fluctuated in the range 61d. to 82d. The average selling price in 1957-58 was 62.5d.

The prices quoted above, except for United Kingdom contract prices, are as compiled by the National Council of Wool Selling Brokers and represent the average price realized for all greasy wool, of whatever type or quality, marketed during the years indicated.

18. **Value.**—Fluctuation in Australian wool prices has a marked effect on the nation's rural income. In 1945-46, the gross value of wool production was £58,597,000 representing 17.4 per cent. of the gross value of all rural industries, while in 1950-51, when prices reached a peak, wool was valued at £651,902,000 or 55.6 per cent. of the total for all rural industries. The value of wool production fell in subsequent years and in 1957-58 was £362,683,000.

Details of the value of wool production for the years 1953-54 to 1957-58, compared with the average for the three pre-war years, are shown below.

WOOL (IN TERMS OF GREASY)—ESTIMATED GROSS VALUE OF TOTAL PRODUCTION.(a)
(£'000.)

Season.	N.S.W.	Vic.	Qld.	S. Aust.	W. Aust.	Tas.	N.T.(b)	A.C.T.	Aust.
Average, 1936-37 to 1938-39	26,276	9,322	9,247	4,111	3,389	980	2	98	53,425
1953-54	180,781	73,384	61,125	44,434	42,523	6,655	90	776	409,768
1954-55	155,335	75,125	52,109	41,602	35,013	7,232	68	654	367,138
1955-56	149,128	69,020	53,134	39,911	35,881	6,190	92	708	354,064
1956-57	217,124	97,659	77,522	57,289	46,965	9,974	106	976	507,615
1957-58(c)	142,613	76,256	53,836	42,354	39,209	7,742	67	606	362,683

(a) Includes shorn, dead and fellmongered wool and wool exported on skins. Excludes distributions of profits under the Wool Disposal Plan. (b) Estimated. (c) Subject to revision.

19. **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 each year 1954 to 1958.

WOOL(a): IMPORTS INTO UNITED KINGDOM.
(⁰⁰⁰ lb.)

Country of Origin.	1954.	1955.	1956.	1957.	1958.
Australia	291,704	336,800	310,585	315,310	292,404
New Zealand	186,352	185,440	163,550	166,050	168,742
Union of South Africa	61,826	64,315	61,194	45,563	52,597
India and Pakistan	35,235	30,505	25,912	29,889	22,717
Other Commonwealth Countries	9,396	9,785	9,583	11,410	9,673
Argentina	21,784	31,553	32,740	32,484	29,178
France	15,707	18,092	22,228	16,657	18,727
Uruguay	37,070	18,855	34,373	17,448	23,350
Other Foreign Countries	24,920	25,977	39,156	40,536	41,845
<i>Total Quantity</i>	<i>683,994</i>	<i>721,322</i>	<i>699,321</i>	<i>675,347</i>	<i>659,233</i>
Total Value (£'000 sterling)	184,670	176,995	167,927	188,754	134,122

(a) Greasy and Scoured.

Australian wool represented 44 per cent. of the total quantity imported into the United Kingdom during 1958. New Zealand supplied 26 per cent. and South Africa 8 per cent., while the total quantity received from British countries constituted 83 per cent. of all United Kingdom imports of wool.

20. **Principal Importing Countries and Sources of Supply.**—The following table, prepared from information published by the Commonwealth Economic Committee, furnishes, in respect of the principal importing countries, details of their production and imports of wool for 1957 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, 1957.
 (Million lb.)

Importing Country.	Pro- duction of Importing Country. (a)	Quantity Imported from(b)—					Total Imports.
		Australia.	New Zealand.	Union of South Africa.	Argen- tina.	Other Countries.	
United Kingdom ..	105	315.3	166.1	45.6	32.5	115.8	675.3
Belgium	(c)	108.7	25.6	12.0	11.1	31.9	189.3
France	55	233.2	104.0	47.2	30.6	28.3	443.3
Germany (Federal Republic)	(c)	109.0	38.8	41.5	13.8	58.2	261.3
Italy	32	145.7	16.5	23.4	15.4	49.1	250.1
Japan	(c)	229.3	10.0	9.9	8.7	16.9	274.8
United States of America(d) ..	307	34.8	26.7	9.5	54.9	73.2	199.1

(a) As in the grease, 1956-57. (b) Actual weight of greasy and scoured wool. (c) Not available. (d) Imports are in terms of estimated clean content of greasy and scoured wool. Actual weight of total United States of America imports was 273.6 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 (11 per cent. of total imports re-exported in 1957) and Belgium.

§ 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 1957-58 amounted to £25,393,000 compared with a total of £24,269,000 in 1956-57 and £20,882,000 in 1955-56.

2. **Sheepskins with Wool.**—The exports of sheepskins with wool constitute the most important item in the values referred to in the preceding paragraph. Of the total exports of £20,219,000 during 1957-58, France obtained 81 per cent. and the United Kingdom 9 per cent. The exports of sheepskins with wool during each of the years 1953-54 to 1957-58 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.	1953-54.	1954-55.	1955-56.	1956-57.	1957-58.
Number .. '000	12,009	13,647	14,841	14,891	14,239	19,441
Value.. .. £'000	2,780	15,569	15,569	15,268	19,438	20,219

3. **Sheepskins without Wool.**—Up to 1943-44, sheepskins without wool were exported chiefly to the United States of America. During 1943-44, that country accounted for 97 per cent. of the total shipments. In subsequent years, however, there has been a decline in shipments to the United States of America and an increase in the quantities shipped to other countries. Of the total value of £232,000 of sheepskins without wool exported in 1957-58 the United States of America received only 36 per cent., France received 37 per cent. and the United Kingdom 20 per cent. Quantities and values for the five years 1953-54 to 1957-58 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.	1953-54.	1954-55.	1955-56.	1956-57.	1957-58.
Number .. '000	808	2,482	2,147	1,771	1,353	813
Value.. .. £'000	70	671	372	424	479	232

4. *Hides.*—(i) *Exports.* The export trade in cattle hides and calf skins during 1957–58 was distributed as follows:—Japan, £700,000; Federal Republic of Germany, £663,000; Italy, £568,000; The Netherlands, £493,000; United Kingdom, £309,000; Sweden, £113,000 and other countries £394,000.

The exports during each of the five years 1953–54 to 1957–58, compared with the average for the years 1934–35 to 1938–39, are shown in the table below:—

EXPORTS OF CATTLE HIDES AND CALFSKINS: AUSTRALIA.

Particulars.	Average, 1934–35 to 1938–39.	1953–54.	1954–55.	1955–56.	1956–57.	1957–58.
Quantity .. '000 lb.	(a) 1,677	18,761	33,817	45,981	45,111	50,557
Value £'000	957	1,381	1,874	2,722	2,524	3,240

(a) '000 skins.

Horse hides exported during 1957–58 weighed 2,220,158 lb. and were valued at £125,170.

(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 1953–54 to 1957–58, 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.	1953–54.	1954–55.	1955–56.	1956–57.	1957–58.
Quantity .. . cwt.	70,781	16,960	12,391	10,537	11,064	9,443
Value £'000	279	174	108	58	66	67

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

**EXPORTS OF FURRED SKINS: AUSTRALIA.
(£'000.)**

Description.	Average, 1934–35 to 1938–39.	1953–54.	1954–55.	1955–56.	1956–57.	1957–58.
Rabbit and Hare ..	(a) 1,150	849	1,100	1,711	975	913
Opossum	125	104	42	15	53	91
Kangaroo and Wallaby ..	191	202	281	285	279	350
Other	69	1	7	2	6	11
Total	1,535	1,156	1,430	2,013	1,313	1,365

(a) Excludes hare skins.

These skins were shipped principally to the United States of America, the United Kingdom, and Belgium and Luxemburg, the values shipped to each in 1957–58, with 1956–57 values in parentheses, being:—United States of America, £1,047,000 (£951,000); United Kingdom, £203,000 (£147,000) and Belgium-Luxemburg, £33,000 (£125,000).

6. *Marketing of Hides and Skins.*—(i) *Sheepskins with Wool.* Details of the agreement between the United Kingdom and Commonwealth Governments for the purchase by acquisition of the “exportable surplus” of woolled sheepskins in Australia during the 1939–45 War were given in Official Year Book No. 37, page 886. The contract expired on 30th June, 1946, and sheepskins have since been marketed mostly 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 operated from November, 1939 to August, 1954. The Australian Hide and Leather Industries Board, which administered the scheme, acquired all cattle hides and yearling and calf skins produced in Australia at set prices and allocated them to tanners at these prices. Further details of the war-time operations of the scheme will be found in Official Year Book No. 37, page 887 and Official Year Book No. 38, pages 930-1.

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 now approximately 30 per cent.

(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 and Lard.

1. *Consumption of Tallow in Factories.*—Details of consumption are collected from the principal factories using tallow (soap and candle, chemical and woollscouring works).

Total consumption of tallow in factories as shown in the table below for the years 1938-39 and 1953-54 to 1957-58 is deficient, however, 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.
1953-54	1,172,710	1956-57	1,207,578
1954-55	1,193,368	1957-58	1,329,771
1955-56	1,210,694		

2. *Exports of Tallow and Lard.*—Particulars of exports of edible (including lard) and inedible tallow are shown in the following table for the five years 1953-54 to 1957-58 in comparison with the average for the five years ended 1938-39.

TALLOW AND LARD: EXPORTS, AUSTRALIA.

(cwt.)

Particulars.	Average, 1934-35 to 1938-39.	1953-54.	1954-55.	1955-56.	1956-57.	1957-58.
Edible(a)	(b)	158,875	74,401	142,498	128,649	130,817
Inedible.. .. .	606,934	823,816	365,985	829,403	936,951	878,060
Total	(b)	982,691	440,386	971,901	1,065,600	1,008,877

(a) Including lard and sweetened fats.

(b) Not available.

3. *Marketing of Tallow.*—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 on 9th November, 1952, tallow export control was removed following termination of the industry's equalization pool arrangement and price de-control in most States.

§ 8. Exports of Principal Pastoral Products.

The quantities and values of the principal pastoral products of Australia exported for the years 1955-56 to 1957-58 were as follows:—

EXPORTS OF PASTORAL PRODUCTS: AUSTRALIA.

Product.	Unit of Quantity.	Quantity.			Value (£'000.)		
		1955-56.	1956-57.	1957-58.	1955-56.	1956-57.	1957-58.
Animals (living)—							
Cattle	No.	8,025	18,360	23,941	475	754	933
Horses	"	582	682	770	264	326	339
Sheep	"	101,837	129,480	122,628	332	482	466
Bones	'000 cwt.	24	20	12	49	47	24
Glycerine	'000 lb.	1,379	1,011	673	129	57	44
Hair and Bristles	cwt.	1,928	2,299	2,147	98	151	128
Hoofs	"	10,461	10,936	6,533	24	23	20
Horns	"	9,347	9,104	8,475	76	81	58
Meats—							
Frozen Beef and Veal ^(a)	'000 lb.	322,748	334,646	282,004	23,431	23,271	21,570
" Mutton and Lamb	"	116,283	76,274	106,622	9,752	6,095	8,384
" Rabbits and Hares	Value only	..	..	..	1,855	2,513	2,802
" Other .. .. .	"	..	..	..	3,833	3,202	3,457
Preserved in Tins, etc.	'000 lb.	130,591	112,193	131,834	18,230	13,175	15,100
Other (excluding Bacon and Ham)	Value only	..	..	..	1,005	849	1,148
Sausage Casings .. .. .	"	..	..	..	2,128	1,700	2,615
Hides and Skins—							
Cattle and Calf	'000 lb.	45,981	45,111	50,557	2,722	2,524	3,240
Horse	"	2,204	1,940	2,220	136	117	125
Sheep and Lamb	'000	16,662	15,592	20,254	15,692	19,917	20,451
Rabbit and Hare	'000 lb.	3,327	2,464	3,686	1,711	975	913
Tallow (Edible and Inedible)	cwt.	956,678	1,057,145	995,046	4,027	4,373	4,311
Wool—							
Greasy	'000 lb.	1,063,493	1,206,625	1,080,634	293,839	425,728	325,509
Scoured, Tops, Noils, Waste	"	114,598	131,961	116,813	43,690	57,997	47,888

(a) Includes chilled beef.