

AGRICULTURAL INDUSTRIES

This chapter is divided into the following major parts: Introduction; Sources of statistics and definitions of units; Structural statistics (provides data on the legal arrangements, size and industry class of the business organisations operating within the agricultural sector); Value of agricultural commodities produced and index of values at constant prices; Apparent consumption of foodstuffs and nutrients; Land tenure and utilisation; Crop statistics; Livestock statistics; Livestock products; Agricultural improvements, employment, regulation of agricultural industries, and the agricultural research activities of the Commonwealth Scientific and Industrial Research Organization (CSIRO).

Introduction

The development of Australian agricultural industries has been determined by interacting factors such as profitable markets, the opening up of new land (including the development of transport facilities) and technical and scientific achievements. Subsistence farming, recurring gluts, low prices and losses to farmers were gradually overcome by the development of an export trade. Profitable overseas markets for merino wool and wheat, and the introduction of storage and refrigerated shipping for the dairying and meat industry, combined to make the agricultural sector Australia's main export earner. Until the late 1950s, agricultural products comprised more than 80 per cent of the value of Australia's exports. Since then, the proportion of Australia's exports from the agricultural sector has declined markedly.

However, this decline in importance has been due not to a decline in agricultural activity but rather to an increase in the quantity and values of the exports of the mining and manufacturing sectors. In fact, the agricultural sector experienced an increase in total output over that period. One interesting aspect of this increase in output is that it was accompanied by a large reduction in the size of the agricultural labour force, implying a large growth in productivity within the sector.

Sources of statistics and definitions of units

The major source of the statistics in this chapter is the Agricultural Census conducted at 31 March each year. A wide range of information is collected from agricultural establishments with agricultural activity covering the physical aspects of agriculture such as area and production of crops, fertilisers used, number of livestock disposed of, etc. In conjunction with the Census, certain supplementary collections are conducted in some States where this has proved expedient, e.g. where the harvesting of certain crops has not been completed by 31 March (apples, potatoes, etc.), special returns covering the crops concerned are collected after the completion of the harvest.

The ABS excludes from the Census those establishments which make only a small contribution to overall agricultural production. Thus the 1986-87 Census includes establishments with agricultural activity which had, or were expected to have, an estimated

value of agricultural operations of \$5,000 or more. In previous years, the value cut off was applied at the enterprise level—for 1981–82 the value was \$2,500 and for earlier years, \$1,500.

While these alterations have resulted in some changes in the counts of numbers of establishments appearing in publications, the effect on the statistics of production of major commodities is small. Statistics of minor commodities normally associated with small scale operations may be affected to a greater extent.

Details of the method used in the calculation of the estimated value of agricultural operations are contained in the publication *Agricultural Industries: Structure of Operating Units, Australia* (7102.0).

Integrated Register Information System—IRIS

Details of agricultural units for 1985–86 have been derived from IRIS. Details of the structure of economic units engaged in agriculture, in hierarchical order, are:

- **Enterprise** (the second level of economic unit). The enterprise is that unit comprising all operations in Australia of a single operating legal entity. (The term 'single legal entity' means a sole trader, partnership, company, trust, cooperative or estate in the private sector, or a department, local government authority or statutory authority in the government sector). For the agricultural sector, a 'multi-State enterprise' is an enterprise which belongs to an enterprise group which undertakes agricultural activities in more than one State.
- **Establishment** (the smallest economic unit). The establishment covers all operations carried out by one enterprise at a single physical location.

Other statistical collections

The ABS conducts a number of other collections to obtain agricultural statistics. These include collections from wool brokers and dealers, livestock slaughterers and other organisations involved in the marketing and selling of agricultural commodities.

For financial statistics from the Agricultural Finance Survey, conducted for 1986–87, see *Agricultural Industries Financial Statistics, Australia, 1986–87, Preliminary* (7508.0).

Structural Statistics

The following tables provide information relating to the structure of operating units during 1984–85. Although the definitions of the operating units have been provided above, the following terminology is also used:

- **Industry.** As set out in the *Australian Standard Industrial Classification (ASIC)* (1201.0 and 1202.0). These publications provide details of the methodology used in determining the industry class of an economic unit.
- **Estimated Value of Agricultural Operations (EVAO).** This is determined by valuing the physical crop and livestock information collected in the Agricultural Census.

A further explanation of this terminology and more detailed statistics are given in the publication *Agricultural Industries: Structure of Operating Units, Australia* (7102.0).

AGRICULTURAL ESTABLISHMENTS: INDUSTRY AND ESTIMATED VALUE OF AGRICULTURAL OPERATIONS: 1985-86

ASIC Code	Industry of establishment Description	Estimated value of agricultural operations (\$'000)										200 and over	Total
		Less than 9	10-19	20-29	30-39	40-49	50-59	60-74	75-99	100-149	150-199		
A	Agriculture, Forestry, Fishing and Hunting—												
01	Agriculture—												
0124	Poultry for meat	20	13	22	25	34	46	67	111	126	66	144	674
0125	Poultry for eggs	40	43	33	23	29	27	30	51	88	100	430	894
0134	Grapes	444	513	469	430	495	457	528	542	356	98	127	4,459
0135	Plantation fruit	1,677	2,160	2,680	2,226	1,930	1,260	1,530	1,990	1,960	94	117	1,955
0136	Orchard and other fruit	1,278	1,083	676	562	504	415	435	490	664	339	534	6,980
0143	Potatoes	37	61	87	101	72	108	136	179	273	179	323	1,556
0144	Vegetables (except potatoes)	563	621	439	355	263	197	265	304	439	242	641	4,329
0181	Cereal grains (incl. oilseeds n.e.c.)	742	906	813	791	776	778	1,240	1,885	2,612	1,614	3,313	15,470
0182	Sheep—cereal grains	294	762	1,005	1,312	1,422	1,614	2,310	3,685	5,108	2,827	4,103	24,442
0183	Meat cattle—cereal grains	309	459	440	361	308	281	380	423	550	286	510	4,307
0184	Sheep—meat cattle	1,064	1,301	1,048	930	801	654	813	1,028	1,134	551	879	10,203
0185	Sheep	3,266	2,417	2,119	2,119	1,756	1,595	1,956	2,343	2,597	1,234	1,497	23,919
0186	Meat cattle	11,596	7,688	3,869	2,254	1,588	1,037	1,128	1,260	1,188	585	1,170	33,229
0187	Milk cattle	428	1,147	1,147	1,147	2,430	2,421	2,928	2,960	2,159	627	392	17,983
0188	Pigs	239	244	187	192	156	132	143	235	318	163	378	2,387
0191	Sugar cane	42	134	288	492	706	745	913	1,036	920	334	266	5,876
0192	Peanuts	5	18	19	22	36	38	45	66	79	37	37	402
0193	Tobacco	—	3	2	10	26	45	73	150	173	47	27	559
0194	Cotton	—	2	2	5	5	4	2	13	21	30	388	469
0195	Nurseries	225	264	288	158	138	233	125	158	235	92	275	2,191
0196	Agriculture n.e.c.	3,019	1,552	798	533	328	258	209	252	203	96	164	7,412
	Total (ASIC code 01)	23,778	19,772	14,320	12,659	12,066	11,211	13,879	17,236	19,439	9,641	15,715	169,716
02	Services to agriculture	39	44	23	10	8	3	5	6	6	—	2	146
03	Forestry and logging	14	10	—	1	2	1	—	—	—	—	1	32
04	Fishing and hunting	4	3	2	1	1	—	—	—	—	—	—	12
	Total (ASIC Division A)	23,835	19,829	14,345	12,671	12,077	11,215	13,885	17,243	19,446	9,642	15,718	169,906
B	Mining	3	5	2	23	10	—	1	1	2	1	—	15
C	Manufacturing	38	32	24	—	—	—	—	—	—	—	—	191
D	Electricity, Gas and Water	—	—	—	—	—	—	—	—	—	—	—	3
E	Construction	83	49	25	17	7	6	5	6	8	2	1	208
F	Wholesale and Retail Trade	77	51	35	17	16	21	8	15	12	3	14	269
G	Transport and Storage	90	78	38	18	16	8	8	8	8	2	2	276
H	Communication	—	—	—	—	—	—	—	—	—	—	—	—
I	Finance, Property and Business Services	23	16	3	7	5	2	—	—	1	2	1	60
J	Public Administration and Defence	21	10	10	13	6	11	15	14	14	13	37	164
K	Community Services	—	—	—	—	—	—	—	—	—	—	—	—
L	Recreation, Personal and Other Services	37	21	9	4	—	7	—	4	2	1	—	85
	Total all industries	24,207	20,092	14,491	12,770	12,138	11,277	13,929	17,304	19,506	9,667	15,799	171,180

NUMBER OF UNITS BY TYPE OF UNIT

<i>Year/unit</i>	<i>NSW</i>	<i>Vic.</i>	<i>Qld</i>	<i>SA</i>	<i>WA</i>	<i>Tas.</i>	<i>NT</i>	<i>ACT</i>	<i>Aust.</i>
1983-84—									
Agricultural establishments	52,704	45,560	33,948	19,289	16,584	5,586	253	101	174,025
Establishments with agricultural activity	53,011	45,984	34,167	19,479	16,750	5,664	255	102	175,412
Agricultural enterprises					—n.a.—				
Non-agricultural enterprises operating agricultural establishments					—n.a.—				
1984-85—									
Agricultural establishments	51,786	45,032	33,614	18,915	16,341	5,384	265	104	171,441
Establishments with agricultural activity	52,116	45,452	33,836	19,191	16,626	5,470	265	105	173,061
Agricultural enterprises	50,209	44,000	32,271	18,439	15,177	5,211	234	85	(a)165,970
Non-agricultural enterprises operating agricultural establishments	584	462	343	153	283	114	3	2	(a)2,088
1985-86									
Agricultural establishments	51,728	43,931	33,745	18,739	16,004	5,199	267	103	169,716
Establishments with agricultural activity	52,042	44,317	33,936	18,971	16,258	5,283	269	104	171,180
Agricultural enterprises	50,187	42,941	32,553	18,213	14,922	5,032	238	86	(a)164,482
Non-agricultural enterprises operating agricultural establishments	940	855	546	401	547	179	5	3	(a)3,636

(a) Includes 'Multi-State' enterprises, i.e. enterprises which operated establishments in more than one State or Territory.

AGRICULTURAL ESTABLISHMENTS (a) INDUSTRY, 1985-86

<i>Industry of establishment</i>										
<i>ASIC Code</i>	<i>Description</i>	<i>NSW</i>	<i>Vic.</i>	<i>Qld</i>	<i>SA</i>	<i>WA</i>	<i>Tas.</i>	<i>NT</i>	<i>ACT</i>	<i>Aust.(b)</i>
A	Agriculture, Forestry, Fishing and Hunting—									
01	Agriculture—									
0124	Poultry for meat	307	131	98	72	50	15	1	—	674
0125	Poultry for eggs	310	196	176	80	104	22	4	2	894
0134	Grapes	763	1,792	111	1,577	201	13	2	—	4,459
0135	Plantation fruit	934	—	891	—	126	—	4	—	1,955
0136	Orchard and other fruit	2,133	1,199	1,223	1,486	645	280	10	4	6,980
0143	Potatoes	176	576	229	108	176	291	—	—	1,556
0144	Vegetables (except potatoes)	912	687	1,282	692	528	210	16	2	4,329
0181	Cereal grains (incl. oilseeds n.e.c.)	4,142	3,457	3,480	2,724	1,649	12	6	—	15,470
0182	Sheep—cereal grains	8,794	4,682	372	4,909	5,587	96	—	2	24,442
0183	Meat cattle—cereal grains	1,575	389	2,201	87	34	16	5	—	4,307
0184	Sheep—meat cattle	3,988	3,207	807	801	795	587	—	18	10,203
0185	Sheep	8,414	7,377	1,295	2,827	2,758	1,228	—	40	23,939
0186	Meat cattle	11,296	7,987	10,007	856	1,833	1,039	190	21	33,229
0187	Milk cattle	2,841	9,697	2,530	1,275	614	1,022	3	1	17,983
0188	Pigs	756	384	661	286	203	95	2	—	2,387
0191	Sugar cane	489	—	5,387	—	—	—	—	—	5,876
0192	Peanuts	2	—	397	—	3	—	—	—	402
0193	Tobacco	23	187	349	—	—	—	—	—	559
0194	Cotton	285	—	184	—	—	—	—	—	469
0195	Nurseries	814	434	475	178	228	50	9	3	2,191
0196	Agriculture n.e.c	2,774	1,549	1,590	781	470	223	15	10	7,412
	Total (ASIC code 01)	51,728	43,931	33,745	18,739	16,004	5,199	267	103	169,716

For footnotes see over.

AGRICULTURAL ESTABLISHMENTS (a) INDUSTRY, 1985-86—continued

<i>Industry of establishment</i>										
ASIC Code	Description	NSW	Vic.	Qld	SA	WA	Tas.	NT	ACT	Aust.(b)
02	Services to agriculture	11	54	22	18	40	1	—	—	146
03	Forestry and logging	8	4	7	—	5	8	—	—	32
04	Fishing and hunting—	—	—	1	3	6	2	—	—	12
<i>Total (ASIC division A)</i>		<i>51,747</i>	<i>43,989</i>	<i>33,775</i>	<i>18,760</i>	<i>16,055</i>	<i>5,210</i>	<i>267</i>	<i>103</i>	<i>169,906</i>
B	Mining	5	3	2	3	2	—	—	—	15
C	Manufacturing	31	34	18	50	50	7	1	—	191
D	Electricity, Gas and water	—	2	—	1	—	—	—	—	3
E	Construction	27	82	18	42	28	11	—	—	208
F	Wholesale and Retail Trade	88	68	34	32	32	15	—	—	269
G	Transport and Storage	80	76	20	40	36	24	—	—	276
H	Communication	—	—	—	—	—	—	—	—	—
I	Finance, Property and Business Services	10	14	5	22	7	1	1	—	60
J	Public Administration and Defence	2	—	—	1	—	—	—	—	3
K	Community Services	34	14	58	11	34	12	—	1	164
L	Recreation, Personal and Other Services	18	35	6	9	14	3	—	—	85
Total, all Industries		52,642	44,317	33,936	18,971	16,258	5,283	269	104	171,180

(a) Includes establishments with an EVAO of less than \$3,000. (b) Includes the Northern Territory and the Australian Capital Territory.

Value of Agricultural Commodities Produced and Index of Values at Constant Prices

Definitions

Gross value of commodities produced: the value placed on recorded production at the wholesale prices realised in the market place.

Marketing costs: include freight, cost of containers, commission and other charges incurred in marketing.

Local value of commodities produced: the value placed on commodities at the place of production as is ascertained by deducting marketing costs from the gross value.

Index of values at constant prices: the index of the gross value of commodities produced at constant prices, i.e. it is a measure of change in value after the direct effects of price changes have been eliminated.

VALUES OF AGRICULTURAL COMMODITIES, 1986-87

	<i>Gross value of agricultural commodities produced</i>	<i>Marketing costs</i>	<i>Local value of commodities produced</i>	<i>Index of values at constant prices of agricultural commodities produced (a) (Base year: 1979-80 = 1,000)</i>
	\$m	\$m	\$m	
Crops	7,737.7	1,149.5	6,588.2	1,191
Livestock slaughterings and other disposals	4,611.0	357.1	4,253.9	1,042
Livestock products	4,915.6	240.3	4,675.3	1,189
Total agriculture	17,272.5	1,789.0	15,483.5	1,144

(a) Weighted by averages unit values for the year 1979-80.

Publications

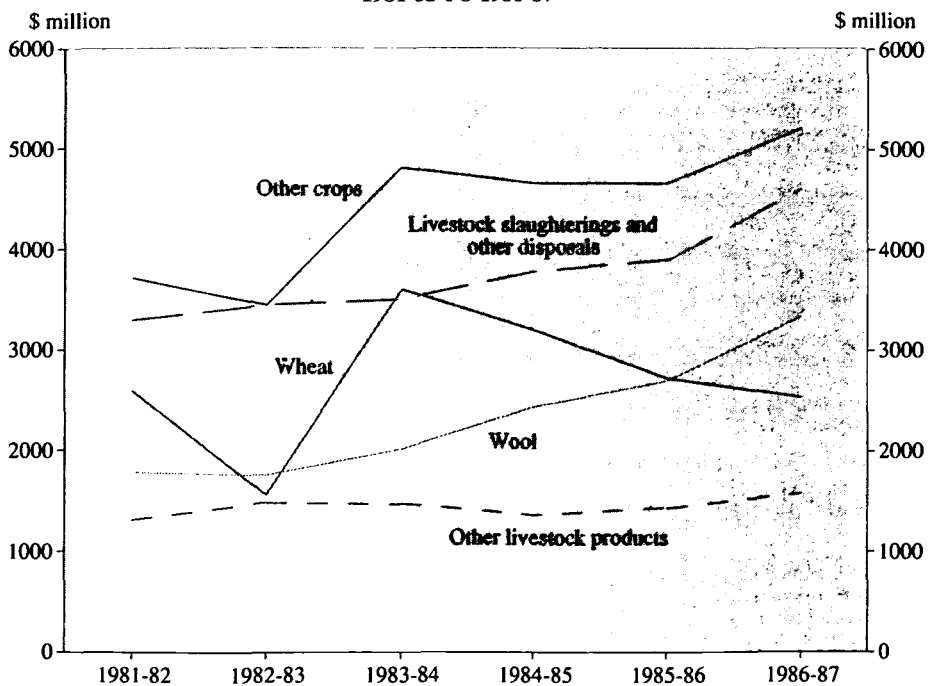
Two preliminary estimates of value of commodities produced are published: *Value of Principal Agricultural Commodities Produced, Australia, Preliminary* (7501.0) and *Value of Selected Agricultural Commodities Produced, Australia, Preliminary* (7502.0). A final publication, *Value of Agricultural Commodities Produced, Australia* (7503.0), contains Indexes of Values at Constant Prices.

Index of Agricultural Commodities Produced

The index is consistent in scope with those of previous years. The indexes are weighted by the average unit values for the year 1979-80 with a reference base of 1979-80 = 1,000.

For further details on how these and earlier series were calculated see *Year Book* No. 61, and *Value of Agricultural Commodities Produced, Australia* (7503.0).

**GROSS VALUE OF SELECTED AGRICULTURAL COMMODITIES
1981-82 TO 1986-87**



GROSS VALUE OF AGRICULTURAL COMMODITIES PRODUCED
(\$ million)

	1981-82	1982-83	1983-84	1984-85	1985-86	1986-87
Crops—						
Barley for grain	463.4	290.8	732.6	759.3	586.8	432.6
Oats for grain	155.7	116.1	203.8	129.6	138.3	164.8
Wheat for grain	2,599.4	1,566.2	3,605.6	3,202.9	2,719.4	2,530.0
Other cereal grains	294.1	260.4	408.7	400.8	346.3	322.4
Sugar cane cut for crushing	590.2	508.9	516.6	512.2	494.2	586.4
Fruit and nuts	464.4	498.0	552.5	670.9	678.6	837.2
Grapes	222.8	212.5	217.0	259.4	270.0	272.2
Vegetables	554.3	556.9	738.6	628.8	713.6	885.4
All other crops (a)	967.6	1,000.5	1,451.1	1,303.5	1,430.5	1,706.7
Total crops	6,311.9	5,010.3	8,426.5	7,867.4	7,377.7	7,737.7
Livestock slaughtering and other disposals (b)—						
Cattle and calves (c)	1,890.1	2,076.2	2,118.0	2,253.2	2,367.3	2,819.7
Sheep and lambs	646.7	548.0	585.0	576.1	531.6	721.2
Pigs	396.1	414.9	375.5	438.1	438.3	468.5
Poultry	362.7	413.1	430.2	512.6	559.1	601.7
Total livestock slaughtering and other disposals	3,295.6	3,452.2	3,508.6	3,783.3	3,896.4	4,611.0
Livestock products—						
Wool	1,788.7	1,760.9	2,016.1	2,434.4	2,693.4	3,333.6
Milk	1,033.9	1,186.5	1,153.2	1,035.4	1,106.7	1,257.4
Eggs	253.4	275.3	295.2	291.2	297.7	291.6
Total livestock products (d)	3,100.6	3,245.8	3,489.8	3,792.8	4,125.3	4,915.6
Total value of agricultural commodities produced	12,708.2	11,708.3	15,424.9	15,443.5	15,406.0	17,272.5

(a) Includes pastures and grasses cut for hay and harvested for seed. Excludes crops for green feed or silage. (b) Includes net exports of livestock. (c) Includes dairy cattle slaughtered. (d) Includes honey and beeswax.

INDEX OF VALUES AT CONSTANT PRICES OF AGRICULTURAL COMMODITIES PRODUCED (a)

(Base year: 1979-80 = 1,000)

	1979-80	1981-82	1982-83	1983-84	1984-85	1985-86	1986-87
Crops—							
Barley for grain	1,000	932	524	1,321	1,500	1,315	968
Oats for grain	1,000	1,146	603	1,627	999	957	1,169
Wheat for grain	1,000	1,017	545	1,374	1,166	1,008	1,047
Other cereal grains	1,000	1,417	975	1,563	1,485	1,420	1,313
Sugar cane (b)	1,000	1,153	1,181	1,074	1,171	1,155	1,128
Fruit and nuts	1,000	988	1,017	968	1,118	1,126	1,354
Grapes	1,000	984	963	994	1,030	1,067	925
Vegetables	1,000	1,056	1,044	1,123	1,289	1,273	1,360
All other crops (c)	1,000	1,106	931	1,400	1,671	1,622	1,754
Total	1,000	1,052	762	1,291	1,266	1,180	1,191
Livestock slaughtering and other disposals—							
Cattle and calves (d)	1,000	1,005	986	860	837	885	984
Sheep and lambs	1,000	946	1,018	936	997	1,072	1,114
Pigs	1,000	1,038	1,087	1,154	1,185	1,234	1,286
Poultry	1,000	893	1,000	952	1,103	1,171	1,227
Total (e)	1,000	988	1,002	907	919	974	1,042
Livestock products—							
Wool	1,000	1,012	995	1,026	1,170	1,171	1,252
Milk	1,000	956	1,011	1,089	1,109	1,105	1,130
Eggs	1,000	927	961	935	866	891	902
Total (f)	1,000	990	995	1,035	1,128	1,130	1,189
Total agricultural commodities produced	1,000	1,019	888	1,115	1,128	1,105	1,144

(a) Indexes of values at constant prices (weighted by average unit values of the year 1979-80). (b) Sugar cane cut for crushing and planting. (c) Includes pasture and grasses. Excludes crops for green feed or silage. (d) Includes dairy cattle slaughtered. (e) Component series based on carcass weight. (f) Includes honey and beeswax.

Apparent Consumption of Foodstuffs and Nutrients

Estimates of consumption in Australia are compiled by deducting net exports from the sum of production and imports and allowing for recorded movement in stocks of the respective commodities. The term 'consumption' is used in a specialised sense, since the quantities actually measured are broadly the quantities available for consumption at a particular level of distribution, i.e. ex-market, ex-store or ex-factory depending on the method of marketing and/or processing. Because consumption of foodstuffs is measured, in general, at 'producer' level no allowance is made for wastage before they are consumed. The effect of ignoring wastage is ultimately to overstate consumption but it is believed that more efficient distribution and storage methods in recent years have cut down wastage. Furthermore, it is likely that many of the foodstuffs are being supplemented by householders' self-supplies over and above the broad estimate already made.

The estimates of consumption per capita have been obtained by using the mean resident population for the period.

More detailed information on the consumption of foodstuffs is contained in the publication *Apparent Consumption of Foodstuffs and Nutrients, Australia* (4306.0). For some commodities, more timely information is contained in the publication *Apparent Consumption of Selected Foodstuffs, Australia, Preliminary* (4315.0).

APPARENT PER CAPITA CONSUMPTION OF FOODSTUFFS (Kg—unless otherwise indicated)

Commodity	1981-82	1982-83	1983-84	1984-85	1985-86	1986-87
Meat and meat products—						
Meat (carcass equivalent weight)						
Beef	47.3	42.4	39.9	40.0	39.3	37.5
Veal	2.6	3.5	2.4	2.1	2.1	1.9
Beef and veal	49.8	45.9	42.3	42.1	41.4	39.4
Lamb	16.3	16.2	16.9	17.0	16.9	15.0
Mutton	3.5	4.5	5.2	6.6	7.1	7.4
Pigmeat (a)	15.1	15.3	16.4	16.4	17.0	16.8
Total	84.7	81.7	80.9	82.9	82.3	78.5
Offal and meat, n.e.i.	4.4	4.4	3.4	2.8	2.7	3.4
Total meat and meat products	89.1	86.1	84.3	85.0	85.0	82.0
Poultry—						
Poultry (dressed weight)	19.6	20.3	20.0	21.8	23.0	23.5
Seafood—						
Fresh and frozen (edible weight)—						
Fish—						
Australian	1.6	1.2	1.7	1.8	2.2	2.3
Imported	1.1	1.5	1.8	1.9	1.8	1.8
Crustacea and molluscs	1.0	1.1	0.8	0.9	0.7	0.8
Seafood otherwise prepared (product weight)—						
Australian	0.4	0.6	0.6	0.4	0.5	0.5
Imported						
Fish	1.9	1.5	2.0	1.9	1.8	1.7
Crustacea and molluscs	0.5	0.4	0.4	0.5	0.5	0.5
Total seafood	6.5	6.3	7.3	7.4	7.5	7.6
Milk and milk products—						
Market milk (fluid whole)(litres)	103.1	102.9	101.6	101.8	102.5	102.9
Condensed, concentrated and evaporated milk—						
Full cream sweetened	0.6	0.9	0.7	0.7	2.8	2.5
Full cream unsweetened	2.4	1.8	2.2	2.0		
Skim	1.2	0.8	0.9	1.2	0.9	1.0
Powdered milk—						
Full cream	0.9	0.8	0.7	0.7	0.6	0.9
Skim	2.8	2.7	2.3	2.3	2.3	2.7
Infants' and invalids' food	1.3	1.2	1.2	1.0	1.2	1.0
Cheese (natural equivalent weight)	7.0	7.4	7.7	8.1	8.0	8.1
Total (converted to milk solids, fat and non-fat)	23.0	22.7	22.5	22.7	22.6	24.1

For footnotes see over.

APPARENT PER CAPITA CONSUMPTION OF FOODSTUFFS—continued
(Kg—unless otherwise indicated)

<i>Commodity</i>	<i>1981-82</i>	<i>1982-83</i>	<i>1983-84</i>	<i>1984-85</i>	<i>1985-86</i>	<i>1986-87</i>
Fruit and fruit products—						
Fresh fruit (incl. fruit for fruit juice)—						
Citrus	36.4	47.9	51.2	45.3	40.8	40.6
Other	37.8	39.6	38.1	41.4	42.1	45.3
Jams, conserves, etc	1.8	1.8	1.8	2.1	1.9	1.9
Dried fruit	2.3	2.5	2.4	3.0	2.9	2.3
Processed fruit	10.3	9.4	9.8	11.1	8.0	7.7
Total (fresh fruit equivalent)	97.4	110.6	113.3	114.6	106.9	106.4
Vegetables—						
White potatoes	57.6	52.2	62.6	59.9	57.7	60.6
Other root and bulb vegetables	18.7	16.9	17.4	19.3	18.9	18.9
Tomatoes	16.7	16.5	18.6	19.6	16.9	18.0
Leafy and green vegetables	20.8	21.4	21.9	22.5	22.8	21.8
Other vegetables	17.1	17.9	18.3	21.0	20.0	19.9
Total (fresh equivalent weight)	130.8	124.9	138.8	142.4	136.2	139.3
Grain products—						
Flour (b)	72.0	67.1	73.1	72.6	71.8	72.0
Breakfast foods—						
Oatmeal and rolled oats	0.9	1.2	1.3	1.3	1.5	1.6
Other (from grain)	7.1	7.6	7.9	8.2	n.a.	8.1
Total breakfast foods	8.0	8.7	9.2	9.6	n.a.	9.7
Table rice	2.9	3.0	3.3	3.7	3.7	3.7
Total grain products	82.9	78.8	85.6	85.8	n.a.	85.4
Bread	47.5	49.3	45.6	45.4	n.a.	n.a.
Eggs and egg products—						
Equivalent number of eggs (c)	222	141	145	143	140	138
Nuts (in shell)—						
Peanuts	1.5	2.1	1.8	1.4	1.6	2.1
Tree nuts	3.3	3.2	3.6	3.8	3.8	3.5
Oils and fats—						
Butter	4.3	4.0	3.9	3.9	3.8	3.5
Margarine						
Table margarine	6.8	6.8	6.9	6.6	6.9	6.8
Other margarine	2.7	2.8	2.7	2.3	2.1	2.1
Total margarine	9.5	9.6	9.6	9.0	9.0	8.9
Total (fat content) (d)	21.8	21.6	21.5	21.0	21.0	20.6
Sugar—						
As refined sugar	12.5	12.0	11.5	10.0	8.2	8.6
In manufactured foods	34.8	34.0	32.4	34.2	36.8	35.3
Total	47.2	46.0	43.9	44.2	45.0	43.9
Honey	0.9	0.8	0.9	0.7	0.8	0.9
Total (e)	51.5	49.6	49.0	49.1	49.9	48.9
Beverages—						
Tea	1.6	1.4	1.5	1.4	1.4	1.3
Coffee (f)	1.9	2.0	2.1	2.0	1.6	1.8
Aerated and carbonated waters (litres)	64.2	65.7	63.0	67.3	73.0	73.6
Beer (litres)	128.6	121.6	117.8	114.5	115.5	111.0
Wine (litres)	19.1	19.7	20.4	21.3	21.6	21.0
Spirits (litres alcohol)	1.2	1.2	1.1	1.2	1.3	1.2

(a) Includes bacon and ham. (b) Includes flour used for breadmaking. (c) Data from 1982-83 consist of commercial disposals only. (d) Includes an estimate for vegetable oils and other fats. (e) Includes sugar content of syrups and glucose. (f) Coffee and coffee products in terms of roasted coffee.

Nutrients

The nutrients table has been compiled by the Nutrition Section of the Commonwealth Department of Community Services and Health and is based on the estimates of the quantity of foodstuffs available for per capita consumption.

For further information on the level of nutrient intake see the publication *Apparent Consumption of Foodstuffs and Nutrients, Australia* (4306.0).

ESTIMATED SUPPLY OF NUTRIENTS AVAILABLE FOR CONSUMPTION (a)
(per capita per day)

(Source: Department of Community Services and Health)

<i>Nutrient</i>	<i>Unit</i>	1981-82	1982-83	1983-84	1984-85	1985-86	1986-87
Protein							
Animal	g	65.0	64.1	62.9	64.3	64.7	63.2
Vegetable	g	33.2	32.2	34.7	34.4	34.1	34.4
<i>Total</i>	g	98.2	96.3	97.6	98.7	98.8	97.7
Fat (from all sources)	g	148.0	145.9	146.3	146.0	146.7	143.1
Carbohydrate	g	399.9	386.3	405.7	407.5	404.6	403.1
Calcium	mg	917	914	912	924	914	931
Iron	mg	15.0	14.9	15.1	15.3	15.2	14.9
Vitamin A activity	µg	1,510	1,496	1,446	1,400	1,367	1,436
Vitamin C (b)—							
Unadjusted	mg	105.0	114.0	122.0	119.0	112.0	114.0
Adjusted	mg	77.0	88.0	93.2	90.8	83.8	87.3
Thiamin (b)—							
Unadjusted	mg	1.8	1.8	1.9	1.9	1.9	1.9
Adjusted	mg	1.5	1.5	1.6	1.6	1.6	1.6
Riboflavin	mg	2.6	2.6	2.6	2.6	2.6	2.6
Niacin (b)—							
Unadjusted	mg	22.5	22.7	23.0	23.2	23.2	23.3
Adjusted	mg	38.9	38.7	39.3	39.7	39.7	39.7
Energy value	kJ	14,471	14,125	14,458	14,506	14,497	14,301

(a) Figures are based on conversion factors calculated from the revised and enlarged edition of S. Thomas and M. Corden *Metric Tables of Composition of Australian Foods*, Canberra, 1977. (b) Data show adjustments made for loss of nutrients in cooking and the extra niacin obtained from the metabolism of protein.

Land Tenures

Land tenure statistics mainly relate to land held under freehold tenure ('alienated or in process of alienation') or leasehold tenure ('leased or licenced') with all agricultural establishments falling within these categories. Descriptions of the land tenure systems of the States and the Territories, and conspectuses of land legislation in force were provided in *Year Book* No. 48 and *Year Book* No. 50.

Disposal of Crown lands

For a description of the provisions that exist in all mainland States for the disposal of Crown lands for public purposes, for unconditional purchase and occupation under lease or licence, see *Year Book* No. 61.

Closer settlement and war service settlement

Particulars of these are given in issues of the *Year Book* up to No. 22, and in *Year Book* Nos 48, 55 and 61.

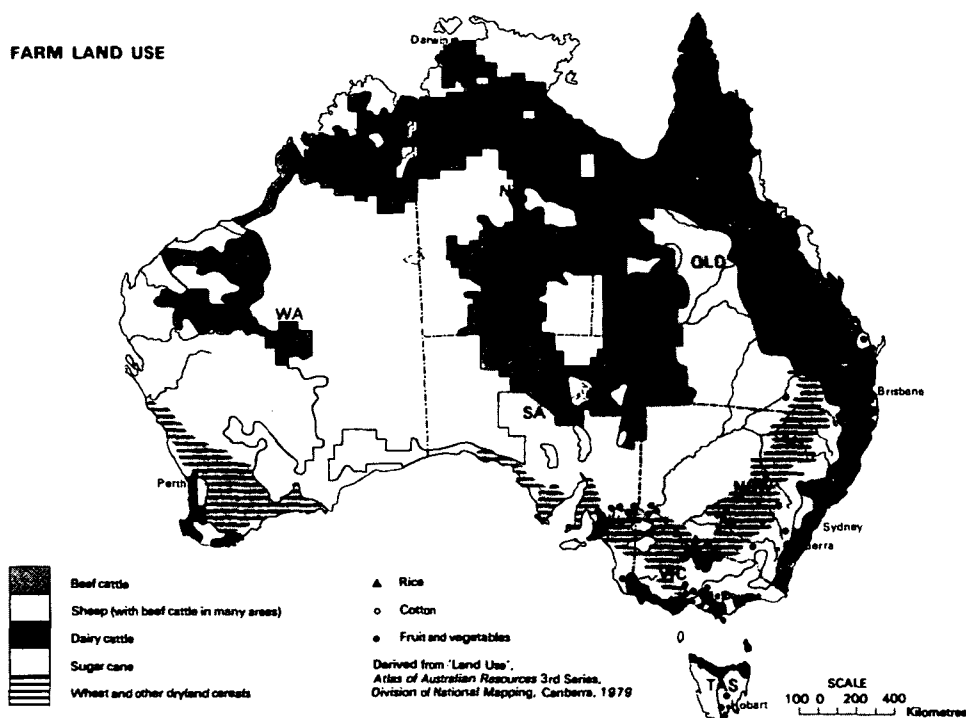
Alienation and occupation of Crown lands

For data relating to land tenures in the States and Territories, see *Year Book* No. 66 and *Year Book* No. 67.

Land Utilisation in Australia

The total area under tenure differs from the total area of agricultural establishments (shown in the following table) by amounts which represent unused land or land held for non-agricultural purposes. In general, land in the more fertile regions tends to be mostly freehold, while the less productive land is held under Crown lease or licence.

FARM LAND USE



AREA OF ESTABLISHMENTS WITH AGRICULTURAL ACTIVITY
(million hectares)

<i>At 31 March</i>	<i>NSW</i>	<i>Vic.</i>	<i>Qld</i>	<i>SA</i>	<i>WA</i>	<i>Tas.</i>	<i>NT</i>	<i>Aust. (incl. ACT)</i>
1982	63.4	14.4	157.1	62.9	113.5	2.2	77.1	490.8
1983	64.0	14.2	155.9	60.2	112.0	2.2	75.2	483.8
1984	64.0	14.3	158.1	62.1	114.3	2.2	73.7	488.6
1985	63.7	14.2	157.2	62.7	114.0	2.1	74.0	488.0
1986	63.3	14.2	158.1	60.7	113.8	2.1	72.9	485.2
1987	60.8	13.1	152.0	59.4	113.0	2.0	71.2	471.0

LAND UTILISATION: AUSTRALIA
(million hectares)

<i>Year</i>	<i>Area of</i>			<i>Total</i>	
	<i>Crops (a)(b)</i>	<i>Sown pastures and grasses (b)</i>	<i>Balance (c)</i>	<i>Area of establishments</i>	<i>Percentage of Australian land area (768,284,000 hectares)</i>
1981-82	19.6	26.9	444.2	490.8	63.9
1982-83	19.4	25.6	438.8	483.8	63.0
1983-84	22.0	26.1	440.5	488.6	63.6
1984-85	21.1	27.1	439.8	488.0	63.5
1985-86	20.9	27.5	436.8	485.2	63.2
1986-87	20.0	27.3	424.0	471.0	61.3

(a) Excludes pastures and grasses harvested for hay and seed which have been included in 'sown pastures and grasses'.
 (b) Prior to 1981-82 figures related to area 'used for' crop or pasture, i.e., an area used for more than one purpose during the year was counted only once. From 1981-82, an area double cropped or an area of pasture also planted to crop has been counted separately each time used. (c) Used for grazing, lying idle, fallow, etc.

The total area of agricultural establishments in 1985-86 constituted 63.2 per cent of the Australian land area, the remainder being urban areas, State forests and mining leases, with an overwhelming proportion of unoccupied land (mainly desert). The balance data include large areas of arid or rugged land held under grazing licences but not always used for grazing. Balance data also include variable amounts of fallow land.

The crop area data represent up to 4.3 per cent of the area of agricultural establishments and emphasise the relative importance of the livestock industry in Australia.

Crops

For this section, statistics relating to crop areas and production have been obtained from the annual Agricultural Census. The Census returns are collected in all States and the two Territories at 31 March each year and relate mainly to crops sown in the previous twelve months.

Where harvests are not completed by March (e.g. potatoes), provision is made in some States for a supplementary collection after the harvest is completed. Additional statistics relating to value of agricultural commodities produced, manufactured production and overseas trade are also included. Agricultural Census data published in this section refer to the 'agricultural' year ended 31 March, while other data refer to the year ended 30 June; but for most purposes there will be little error involved in considering 'agricultural year' data as applying to the financial year.

The following table shows the area of crops in each of the States and Territories of Australia since 1860-61.

AREA OF CROPS (a)
(^{'000} hectares)

Year	NSW	Vic.	Qld	SA	WA	Tas.	NT	ACT	Aust.
1860-61	100	157	2	145	10	62	—	—	475
1870-71	156	280	21	325	22	64	—	—	868
1880-81	245	627	46	846	26	57	—	—	1,846
1890-91	345	822	91	847	28	64	—	—	2,197
1900-01	990	1,260	185	959	81	91	—	—	3,567
1910-11	1,370	1,599	270	1,112	346	116	—	—	4,813
1920-21	1,807	1,817	316	1,308	730	120	—	1	6,099
1930-31	2,756	2,718	463	2,196	1,939	108	1	2	10,184
1940-41	2,580	1,808	702	1,722	1,630	103	—	2	8,546
1949-50	2,295	1,881	832	1,518	1,780	114	—	4	8,424
1954-55	2,183	1,904	1,049	1,711	2,069	122	—	2	9,040
1959-60	2,888	1,949	1,184	1,780	2,628	130	1	3	10,564
1964-65	4,182	2,621	1,605	2,414	3,037	163	2	4	14,028
1969-70	4,999	2,212	2,208	2,290	3,912	98	6	2	15,728
1971-72	4,186	1,925	2,017	2,278	3,751	67	7	1	14,231
1972-73	4,329	1,943	1,963	2,122	3,814	80	12	1	14,265
1973-74	4,628	1,981	1,786	2,451	4,133	74	6	1	15,060
1974-75	4,089	1,772	1,898	2,257	3,754	67	7	1	13,845
1975-76	4,285	1,851	2,010	2,116	4,208	60	8	1	14,539
1976-77	4,520	1,943	2,026	2,036	4,417	65	2	1	15,010
1977-78	4,984	2,163	2,107	2,564	4,910	70	1	1	16,800
1978-79	5,020	2,209	2,307	2,827	4,993	80	2	1	17,438
1979-80	5,243	2,243	2,334	2,771	5,281	79	2	1	17,954
1980-81	5,208	2,180	2,481	2,772	5,547	84	1	1	18,273
1981-82	5,744	2,184	2,765	2,865	5,963	90	2	1	19,613
1982-83	5,200	2,234	2,648	2,856	6,380	98	3	1	19,420
1983-84	6,566	2,655	2,998	3,108	6,526	101	5	1	21,961
1984-85	5,789	2,569	3,047	2,902	6,723	99	6	1	21,136
1985-86	5,990	2,528	3,231	3,039	5,970	88	7	1	20,853
1986-87	5,325	2,317	3,036	3,066	5,930	78	12	—	19,764

(a) The classification of crops was revised in 1971-72 and adjustments made to statistics back to 1967-68. After 1966-67 lucerne for green feed, hay and seed, and pasture cut for hay and harvested for seed or green feed are excluded.

NOTE: From 1970-71 to 1980-81 figures related to area 'used for' crops, i.e. an area used for more than one purpose during the year was counted only once. From 1981-82, an area double cropped has been counted separately each time used.

The wide range of climatic and soil conditions over the agricultural regions of Australia has resulted in a diversity of crops being grown throughout the country. Generally, cereal crops (excluding rice, maize and sorghum) are grown in all mainland States over wide areas, while other crops are confined to specific locations in a few States. However, scanty or erratic rainfall, limited potential for irrigation and unsuitable soils or topography have restricted intensive agriculture. Despite this, agricultural production has increased over time to meet increased demands both in Australia and from overseas.

The following table provides a summary of the area, production and gross value of the principal crops in Australia.

CROPS: AREA, PRODUCTION AND GROSS VALUE

	1984-1985			1985-86			1986-87		
	Area (^{'000} ha)	Prod- uction (^{'000} tonnes)	Gross value (\$m)	Area (^{'000} ha)	Prod- uction (^{'000} tonnes)	Gross value (\$m)	Area (^{'000} ha)	Prod- uction (^{'000} tonnes)	Gross value (\$m)
Cereals for grain—									
Barley	3,518	5,554	759	3,238	4,868	587	2,274	3,548	433
Grain sorghum	723	1,369	197	729	1,416	181	818	1,419	162
Maize	103	291	46	82	278	40	58	206	31
Oats	1,041	1,367	130	1,049	1,330	138	1,140	1,584	165
Rice	122	866	123	106	716	81	96	608	85
Wheat	12,078	18,666	3,203	11,683	16,167	2,719	11,135	16,119	2,530
Legumes for grain	787	784	114	889	854	163	1,244	1,315	294
Crops for hay—									
Oats	182	633	45	171	594	47	205	676	58
Wheat	53	163	12	59	165	13	67	186	15
Crops for green feed, silage—									
Barley	54	n.a.	n.a.	75	n.a.	n.a.	85	n.a.	n.a.
Forage sorghum	81			116			177		
Oats	571			662			645		
Wheat	19			29			71		
Sugar cane cut for crushing	313	25,450	512	304	24,402	494	300	24,742	586
Tobacco	5	12	65	5	11	56	5	12	65
Cotton	183	679	330	177	685	325	156	612	373
Peanuts (in shell)	30	42	37	29	43	38	34	48	42
Soy Beans	48	110	36	63	105	28	54	90	27
Rapeseed	30	32	10	74	87	24	65	76	18
Sunflower	354	293	88	277	215	53	193	137	34
Fruit (excl. grapes)	109	—	259	113	—	679	107	—	837
Fruit—									
Orchard	91	—	522	94	—	518	89	—	634
Oranges	n.a.	445	132	n.a.	496	132	n.a.	504	126
Apples	21	352	178	20	292	139	19	325	205
Pears	n.a.	139	51	n.a.	143	64	n.a.	145	77
Peaches	n.a.	60	28	n.a.	61	29	n.a.	61	41
Bananas	9	145	93	10	134	102	9	156	127
Pineapples	6	125	33	6	132	33	6	142	42
Grapes	64	890	259	64	907	270	57	783	272
Vegetables	111	—	629	111	—	714	111	—	885
Potatoes	38	992	163	36	965	206	37	1,015	267
Total, all crops (excluding pastures)	21,136	—	7,626	20,853	—	7,049	19,764	—	7,318

In the tables that follow, crop statistics are shown in these groupings: wheat, coarse grains, rice, oilseeds, sugar, vegetables, fruit, grapes and other crops such as tobacco, mushrooms and fodder crops.

Cereal Grains

In Australia, cereals are conveniently divided into autumn–winter–spring growing ('winter' cereals) and spring–summer–autumn growing ('summer' cereals). Winter cereals such as wheat, oats, barley and rye are usually grown in rotation with some form of pasture such as grass, subterranean clover, medics or lucerne. In recent years, alternative winter crops such as rapeseed, field peas and lupins have been introduced to cereal rotation in areas where they had not previously been grown. Rice, maize, sorghum and the millets are summer cereals with the latter two being grown in association with winter cereals in some areas. In Northern Queensland and Western Australia there are two rice growing seasons—a dry season winter crop and a wet season summer crop.

Cereals for grain form a significant percentage of both the value of Australia's agricultural commodities and of the country's export earnings. The following table shows the significance of cereal grains in the last 6 years.

CEREAL GRAINS IN AUSTRALIA: A PERSPECTIVE

Year	Cereal grains (a)		Total agriculture gross value	Total Australian exports— all produce value f.o.b.	Gross value of cereal grains as a percentage of gross value of agriculture	Export value of cereal grains as a percentage of total Australian exports
	Gross value \$m	Export value f.o.b. \$m			per cent	per cent
1981–82	3,512.7	2,367.9	12,708	19,294	27.6	12.1
1982–83	2,230.4	1,669.7	11,714	21,454	19.0	7.6
1983–84	4,950.6	2,564.9	15,425	24,013	32.1	10.9
1984–85	4,492.6	4,068.8	15,444	29,708	29.1	13.9
1985–86	3,790.8	3,812.6	15,406	32,795	24.6	11.9
1986–87	3,449.8	2,628.0	17,272	35,783	20.0	7.3

(a) Principally wheat, barley, oats, grain sorghum, rice and maize, with panicum/millet, canary seed and rye being minor cereals.

Wheat

Wheat is grown in all States, and is Australia's most important crop in terms of production and exports. As 70 to 80 per cent of the wheat crop is exported, wheat marketing arrangements play an important role in the industry. The Australian Wheat Board (AWB) was constituted in September 1939, under National Security (Wheat Acquisition) Regulations, to purchase, sell or dispose of wheat and wheat products. At the end of World War II, the AWB continued to operate under extensions to these regulations, until 1948, when the Commonwealth and States agreed to national marketing arrangements. After a poll of growers had approved the plan the necessary complementary legislation was passed by the Commonwealth and the States. The *Wheat Industry Stabilization Act 1948* established the present AWB to acquire and market all wheat and to administer successive stabilisation plans. The *Wheat Marketing Act 1979* replaced the stabilisation plans with a guaranteed minimum price scheme, applicable to an unlimited quantity of wheat.

Wheat marketing and pricing arrangements 1984–85 to 1988–89

The basic elements of the new arrangements were negotiated between the Australian Wheatgrowers' Federation (now renamed the Grains Council of Australia) and Commonwealth and State Governments. The enactment of State legislation complementary to the Commonwealth legislation was necessary for the implementation of a national scheme.

Under current arrangements, the AWB continues as a statutory authority responsible for the marketing of wheat in Australia and overseas although it can now issue permits for the domestic sale of stockfeed wheat outside the pooling arrangements. The concept of a guaranteed minimum price is retained. The AWB has been given greater commercial freedom but is required to operate in accordance with an approved corporate plan and be accountable to growers as well as parliament. The following are important features in the current plan.

Guaranteed Minimum Price

The Commonwealth Government underwrites wheat returns on a net basis through a Guaranteed Minimum Price (GMP) Scheme. The Australian Standard White (ASW) GMP is set at 95 per cent of the average of the estimated gross return per tonne for all wheat (ASW basis) from the subject season and the lowest two of the previous three seasons less the estimated pool costs per tonne for the subject season. Separate GMPs are established for categories of wheat, the quality of which is above or below ASW, based on the expected market value of the wheat in those categories relative to ASW.

Growers receive a split first advance payment. Upon delivery of the wheat, a grower is paid 90 per cent of the estimated GMP for the relevant category less contributions to research (wheat tax), dockages for non-approved varieties and allowances for storage, handling and transportation charges. When the final GMP has been determined (before 1 March during the subject season), the grower receives the final GMP, increased or decreased by an allowance for the quality of wheat (in addition to the deductions made at the time of delivery), less the interim advance payment already received. Initial allowances may be adjusted by the Board at a later date to reflect actual costs and returns. If the net return per tonne exceeds the GMP, the excess is returned to growers by way of a final payment, which may be made by instalments over a number of years. The government meets any deficiency between the net pool return rate and the GMP.

These arrangements are market related but they provide the industry with support from the government that is designed to help it overcome any major short-run down-turn in producers' returns. Particulars of GMP rates may be found in *Crops and Pastures, Australia* (7321.0).

Financial arrangements

From 1984-85, the AWB with the Minister's approval has been able to borrow overseas up to an amount equal to the aggregate size of expected foreign currency denominated sales in respect of a particular season, provided that amount does not exceed that season's net financing requirement.

Domestic pricing

The domestic price for human consumption wheat is determined each quarter by averaging the quoted export prices for the forward and past quarters and adding a margin to cover the additional costs of servicing the domestic market. The prices for the four quarters from October 1987 ranged from \$181.18 per tonne to \$202.02 per tonne, including \$1.90 per tonne Tasmanian freight levy. This levy applies to all domestic wheat sales and is used exclusively to cover the cost of shipping wheat from the mainland to Tasmania each season.

Domestic prices for industrial and stockfeed wheats are quoted daily by the AWB in the light of its commercial judgment and are related to export prices.

Domestic marketing arrangements

The AWB controls the domestic marketing of wheat although domestic stockfeed wheat may be directly sold by growers to buyers under a permit issued by the AWB. The availability of these permits is governed by guidelines issued by the Federal Minister for Primary Industries and Energy and the relevant State Ministers. Wheat sold pursuant to a stockfeed purchase permit is subject to a deduction to cover wheat research tax, Tasmanian freight, the AWB's administration costs and a reduced bulk handling authority charge. No pooling or GMP provisions or minimum or maximum prices apply in respect of such wheat.

The AWB may also authorise a grower to sell wheat on behalf of the AWB under grower-to-buyer direct delivery transactions. The grower and buyer negotiate quality and freight allowances around the AWB's domestic ASW price applicable for the same end use. The proceeds of sale are incorporated in the AWB's pooling arrangements.

The grower receives payment from the AWB as if he had delivered ASW wheat, adjusted by the abovementioned allowances and a reduction in the relevant bulk handling authority's charge.

Wheat which is retained by a grower for his own use does not come under the control of the AWB.

The AWB has power to import wheat for use on the domestic market.

Overseas marketing arrangements

Under the 1984 Act, the AWB maintains sole authority for the export of wheat but no longer controls the export of wheat products. The Act extends the powers of the Board in relation to overseas marketing to enable it to enter into tripartite barter arrangements and the sale and shipment of other grains in combination with wheat. The AWB undertakes market research and promotion both within and outside Australia.

Wheat classification

Unlike the other wheat exporting nations, Australia does not produce red grained wheats, nor does it have the traditional winter or spring wheats found in the northern hemisphere.

All Australian wheats are white grained, and all are planted during the Australian winter months of May, June and July. They grow during the spring months of August, September and October. The harvest commences in Queensland in September–October and gradually progresses southwards, culminating in Victoria and the southern part of Western Australia in January.

The various combinations of wheat varieties, soil fertility and seasonal conditions encountered throughout the Australian wheat belt enable a wide spectrum of recognised wheat types to be produced. These range from high protein hard grained wheats to low protein soft grained wheats.

Before wheat delivered by farmers can be received into the bulk handling system, the wheat must conform to strict receival standards. These standards are set by the AWB and are collectively referred to as Australian Standard White specification, which broadly relates to moisture content (12 per cent maximum), test weight (74 kilograms per hectolitre minimum), no insects, and a range of tolerances for unmillable material, weather damaged and sprouted kernels, foreign matter and foreign seeds.

In addition to the receival standards, a system of varietal control operates Australia-wide in which the AWB can impose a monetary penalty on wheat received according to the variety delivered and the region of production. The aim of this system is to ensure that varieties are grown in areas where the protein content that they are likely to achieve is in line with the processing characteristics of the wheat (grain hardness, milling quality, dough properties), and to highlight to growers the need to grow marketable varieties of wheat.

The system of classification of Australian wheats has evolved in response to changing market demands. The wheats are classified into two broad categories, namely the milling and non-milling classes, according to test weight, grain soundness and other physical factors. Further classification into grades is based on wheat variety, protein content and grain hardness.

Australian wheats of the following categories are suitable for milling purposes:

- Australian Prime Hard
- Australian Hard
- Australian Standard White (ASW)
- Australian Soft
- Australian Durum
- Australian General Purpose 1
- Australian General Purpose 2 and Feed categories are non-milling wheats which have incurred weather damage or have some other defect.

There can exist within each category a number of individual classes, many of which have been developed to meet individual customer requirements. Particulars of Australian wheat standards may be found in *Crops and Pastures, Australia* (7321.0).

Central Grain Research Laboratory

In 1976, the Australian Wheat Board established this laboratory in Sydney as an addition to the facilities of the Bread Research Institute of Australia. The main functions of the laboratory are to test and report on the Australian crop, to analyse and compare competitor wheats from other countries and to develop research programs to aid the marketing of wheat.

WHEAT: AREA, PRODUCTION AND RECEIVALS

Season	Area (a)		Production (a)		Australian Wheat Board receivals (b)
	For grain	All purposes	Grain	Gross value	
	'000 ha	'000 ha	'000 tonnes	\$m	'000 tonnes
1981-82	11,885	11,995	16,360	2,599.4	(b)15,531
1982-83	11,520	11,755	8,876	1,566.2	7,927
1983-84	12,931	13,025	22,016	3,605.6	21,059
1984-85	12,078	12,150	18,666	3,202.9	17,544
1985-86	11,736	11,823	16,167	2,719.4	15,085
1986-87	11,135	11,274	16,119	2,530.4	15,288

(a) Area and production data relate to the year ending 31 March. (b) Due to amendments to the *Wheat Marketing Act 1979*, the AWB has changed from a December–November to an October–September crop year. To facilitate this transition, 1981–82 was a 10 month (December–September) reporting period.

WHEAT FOR GRAIN: AREA AND PRODUCTION, BY STATE

Season	NSW	Vic.	Qld	SA	WA	Tas.	Aust.
AREA ('000 hectares)							
1981-82	3,600	1,322	941	1,427	4,593	1	11,885
1982-83	3,162	1,327	767	1,398	4,865	1	11,520
1983-84	3,999	1,614	1,006	1,564	4,746	2	12,931
1984-85	3,603	1,523	921	1,378	4,652	2	12,078
1985-86	3,663	1,508	973	1,443	4,148	2	11,736
1986-87	3,099	1,364	795	1,616	4,260	2	11,135
PRODUCTION ('000 tonnes)							
1981-82	5,910	2,467	1,482	1,695	4,803	2	16,360
1982-83	1,499	394	754	692	5,534	1	8,876
1983-84	8,961	3,971	1,922	2,843	4,316	3	22,016
1984-85	5,805	2,666	1,579	2,031	6,580	4	18,666
1985-86	5,916	2,250	1,691	1,944	4,362	4	16,167
1986-87	4,855	2,795	833	2,255	5,377	5	16,119

PRODUCTION AND DISPOSAL OF WHEAT
(^{'000 tonnes})

	1982	1983	1984	1985	1986	1987
Year ended 31 March—						
Production	16,360	8,876	22,016	18,666	16,167	16,139
Balance held on farm for seed, feed and other uses	829	949	957	1,122	1,082	851
Year ended 30 September (a)—						
Wheat received	15,531	7,927	21,059	17,544	15,085	15,288
Carry-in	2,044	4,879	2,285	7,518	8,456	5,838
Total availability for export, domestic disposal and carryover	17,575	12,806	23,344	25,062	23,541	21,126
Exports of wheat, flour and wheat products	11,068	7,280	14,159	14,679	16,026	15,582
Domestic disposals	1,628	3,241	1,667	1,941	1,709	1,772
Total disposals	12,696	10,521	15,826	16,620	17,735	17,354

(a) Due to amendments to the *Wheat Marketing Act 1979*, the AWB has changed from a December–November to an October–September crop year. To facilitate this transition, 1981–82 was a 10 month (December–September) reporting period.

Wheat pools

Details of wheat receivals by State of origin for the several Pools together with Pools payments and times of payment will be found in the latest issue of *Crops and Pastures, Australia* (7321.0).

International Wheat Agreement

A number of Agreements have operated since 1933 to provide a valuable framework for continuing international consultation and cooperation on world wheat matters, including the regular monitoring of the world wheat situation. On 1 July 1986, the International Wheat Agreement 1986 entered into force and will remain in force until 30 June 1991. It comprises two separate legal instruments, the Wheat Trade Convention and the Food Aid Convention, linked by a common preamble. The primary objective of the Wheat Trade Convention is to promote international cooperation in all aspects of trade in wheat and other grains. Under the Food Aid Convention, countries undertake to provide minimum annual amounts of food grain as aid. Contributions are made by both wheat importing and exporting countries in the form of grain (or grain products) for human consumption or cash for the purchase of grain.

WHEAT EXPORTS: A COMPARISON WITH OTHER EXPORT COMMODITIES (a)

Year	Wheat for grain: export		Total Australian exports— all produce: value f.o.b.	Export value of wheat for grain as a percentage of total Australian exports
	Quantity	Value f.o.b.		
	^{'000 tonnes}	\$m	\$m	per cent
1981–82	10,912	1,719.7	19,249	8.8
1982–83	8,022	1,343.1	21,454	6.1
1983–84	10,535	1,813.8	24,013	7.3
1984–85	15,704	2,866.9	29,708	9.8
1985–86	16,109	2,968.8	32,795	9.3
1986–87	14,789	2,168.3	35,783	6.1

(a) These statistics exclude re-exports.

WORLD WHEAT: AREA AND PRODUCTION

(Source: International Wheat Council, World Wheat Statistics, 1986)

	Area (million hectares)			Production (million tonnes)		
	1984-85	1985-86	1986-87	1984-85	1985-86	1986-87
Europe	27.2	26.3	27.0	129.2	112.5	116.1
EEC (10)	13.6	13.0	15.7	76.1	65.6	72.0
USSR	51.1	50.3	48.7	68.6	78.1	92.3
North and Central America	41.3	40.9	40.0	96.4	95.5	93.0
Canada	13.2	13.7	14.2	21.2	24.3	31.4
United States	27.1	26.2	24.6	70.6	66.0	56.8
South America	8.9	9.0	10.2	17.4	15.1	16.9
Asia	83.3	83.5	83.2	177.1	177.6	188.4
China (a)	29.6	29.2	29.7	87.8	85.8	90.3
India	24.7	24.4	23.1	45.5	44.2	46.9
Iran	6.0	6.0	6.2	6.0	6.5	6.6
Pakistan	7.4	7.3	7.4	10.9	11.7	13.9
Turkey	9.0	9.1	9.3	17.2	17.0	19.0
Africa	8.3	8.6	8.0	9.4	10.5	11.6
Oceania	12.2	11.8	11.3	19.0	16.3	16.5
Australia	12.1	11.7	11.2	18.7	16.2	16.1
Total	232.3	230.5	228.5	516.8	505.3	534.8

(a) Excludes Taiwan Province: FAO estimates.

NOTES:

1. Crop years shown cover northern hemisphere harvests combined with those of the southern hemisphere which immediately follow.
2. The ten members of the EEC are: Belgium, Denmark, France, Federal Republic of Germany, Greece, Ireland, Italy, Luxembourg, Netherlands and the United Kingdom.

Australia acceded to the Wheat Trade Convention, 1986 in July 1986. Major changes from the previous Wheat Trade Convention, which operated from 1971, include expansion to cover coarse grains and amendments to reflect the fact that the Convention does not contain economic provisions. The Wheat Trade Convention through its plenary body, the International Wheat Council (IWC), provides a forum for exchange of information and discussion of members' concerns regarding trade in grains. In the context of the current round of GATT Multilateral Trade Negotiations, Australia has proposed that the IWC Secretariat undertake a study examining the effects of changes in national policies on world grains markets.

Australia made a formal application to accede to the Food Aid Convention, 1986 at the 53rd Session of the Food Aid Committee in December 1986 with a minimum annual contribution of 300,000 tonnes, compared with 400,000 tonnes under the previous Convention. The decision to reduce the level of Australia's commitment was made against the background of the severe economic difficulties being experienced in Australia which, inter alia, have effectively reduced our capacity to provide development assistance, including food aid. Australia's application was accepted at the 54th Session of the Food Aid Convention in June 1987.

Coarse grains

In the late sixties and early seventies, restrictions on wheat deliveries and low returns in the sheep industry caused a resurgence of interest in coarse grain crops and the newer oilseed crops. The resultant higher level of plantings and production has been maintained, despite the lifting of wheat delivery quotas and a general improvement in market prospects for wheat, wool and meat.

Oats

Oats are traditionally a cereal of moist temperate regions. However, improved varieties and management practices have enabled oats to be grown over a wide range of soil and climatic conditions. They have a high feed value and produce a greater bulk of growth than other winter cereals; they need less cultivation and respond well to superphosphate and nitrogen. Oats have two main uses: as a grain crop, or as a fodder crop, (following sowing or fallow or rough sowing into stubble or clover pastures). Fodder crops can either be grazed and then harvested for grain after removal of livestock or else mown and baled or cut for chaff. Oats produced in New South Wales are marketed through a statutory board while the Victorian Oatgrowers' Pool and Marketing Company Ltd and private merchants market the bulk of oats produced in Victoria. In South Australia the Barley Marketing Act was amended in 1977 to give the Australian Barley Board powers over oat marketing in that State. Under the legislation amendments, the Board controls export sales and grain resold on the local market; however, direct sales between producers and consumers are outside the Board's supervision. In Western Australia, oats are marketed under a warehousing system operated by Co-operative Bulk Handling Ltd.

Oats are usually next in importance to wheat and barley among the grain crops. About three-quarters of the crop is used domestically as stockfeed or for human consumption.

OATS FOR GRAIN: AREA, PRODUCTION AND EXPORTS

Year	Area	Production		Exports	
		Quantity	Gross value	Quantity	Value f.o.b.
	'000 ha	'000 tonnes	\$m	'000 tonnes	\$m
1981-82	1,388	1,617	155.7	153	24.1
1982-83	1,212	848	116.1	83	13.2
1983-84	1,772	2,296	203.8	289	40.9
1984-85	1,041	1,367	129.6	391	49.0
1985-86	1,068	1,330	138.3	185	25.1
1986-87	1,140	1,584	164.8	190	26.3

Barley

This cereal contains two main groups of varieties, 2-row and 6-row. The former is generally, but not exclusively, preferred for malting purposes. Barley is grown principally as a grain crop although in some areas it is used as a fodder crop for grazing, with grain being subsequently harvested if conditions are suitable. It is often grown as a rotation crop with wheat, oats and pasture. When sown for fodder, sowing may take place either early or late in the season, as it has a short growing period. It may therefore provide grazing or fodder supplies when other sources are not available. Barley grain may be crushed to meal for stock or sold for malting.

Crops sown for malting purposes require a combination of light textured soil of moderate fertility, reliable rainfall, and mild weather during ripening. The main barley-growing areas in Australia are situated in South Australia, but considerable quantities are also grown in New South Wales, Western Australia, Victoria and Queensland. In December 1980, a joint Commonwealth-industry research scheme for the barley industry commenced operation. The scheme is financed by a levy on barley production and a Commonwealth contribution not exceeding the total of the levy.

Barley is marketed by statutory marketing authorities in each of the mainland States. The Australian Barley Board controls marketing in both South Australia and Victoria, while separate authorities operate in the three other States.

BARLEY FOR GRAIN: AREA, PRODUCTION AND EXPORTS

Year	Area '000 ha	Production				Exports	
		2-row	6-row	Total		Quantity '000 tonnes	Value f.o.b. \$m
				Quantity	Gross value \$m		
1981-82	2,685	3,252	198	3,450	463.5	1,577	241.3
1982-83	2,452	1,785	153	1,939	287.6	834	131.4
1983-84	3,109	4,585	305	4,890	732.6	3,121	499.4
1984-85	3,518	5,194	361	5,554	759.3	5,183	750.0
1985-86	3,284	4,635	233	4,868	586.8	4,168	536.6
1986-87	2,274	3,397	151	3,548	432.6	2,191	254.1

Grain sorghum

The sorghums are summer growing crops which are used in three ways: grain sorghum for grain; sweet or fodder sorghum, sudan grass and, more recently, columbus grass for silage, green feed and grazing; and broom millet for brooms and brushware.

Grain sorghum has been grown extensively only in the last two decades. Rapid increases in production have resulted in a substantial increase in exports over this period. The grain is used primarily as stockfeed and is an important source for supplementing other coarse grains for this purpose.

The climatic conditions of Queensland and northern New South Wales are particularly suited to the growing of sorghum. In Queensland, grain sorghum production is concentrated in the Darling Downs, Fitzroy and Wide Bay-Burnett Divisions. In New South Wales, the northern and north-western slopes and plains are the main areas.

In Queensland, a degree of orderly marketing is ensured by the operation of the Central Queensland Grain Sorghum Marketing Board (a statutory authority in a defined area in central Queensland). A State statutory marketing board handles sorghum grown in New South Wales.

GRAIN SORGHUM: AREA, PRODUCTION AND EXPORTS

Year	Area '000 ha	Production		Exports	
		Quantity '000 tonnes	Gross value \$m	Quantity '000 tonnes	Value f.o.b. \$m
1981-82	648.6	1,316.7	140.1	1,270.9	152.8
1982-83	706.5	958.0	124.4	445.0	53.9
1983-84	730.3	1,885.5	246.3	772.1	110.7
1984-85	723.0	1,369.0	196.9	1,593.6	242.1
1985-86	734.2	1,415.7	180.8	1,234.2	177.6
1986-87	818.0	1,419.0	161.5	817.9	90.6

Maize

Like sorghum, maize is a summer cereal demanding specific soil and climatic conditions. Maize for grain is almost entirely confined to the south-east regions and Atherton Tablelands of Queensland; and the north coast, northern slopes and tablelands and the Murrumbidgee Irrigation Area in New South Wales. Small amounts are grown in all States, except South Australia, for green feed and silage, particularly in association with the dairy industry.

A statutory board controls the marketing of maize in the Atherton Tablelands area of Queensland. A large proportion of the crop is sold directly to food processors.

MAIZE: AREA, PRODUCTION AND EXPORTS

Year	Area	Production		Exports	
		Quantity	Gross value	Quantity	Value f.o.b.
	'000 ha	'000 tonnes	\$m	'000 tonnes	\$m
1981-82	61.0	212.4	29.6	14.2	1.9
1982-83	64.3	139.1	23.3	18.3	2.4
1983-84	68.4	238.2	35.6	19.0	2.8
1984-85	102.9	291.4	46.1	139.8	24.9
1985-86	84.2	277.7	40.4	81.3	13.2
1986-87	58.0	206.0	31.1	45.7	7.0

Rice

In Australia, rice was first grown commercially in 1924-25 in the Murrumbidgee Irrigation Area, one of three irrigation areas in southern New South Wales where rice is now produced. Today, about 97 per cent of Australia's rice is grown in New South Wales. The remainder is grown in the Burdekin River basin and at Mareeba in Northern Queensland.

Rice is a summer growing crop in New South Wales. The combination of irrigation water and the relatively cloudless days characteristic of summers in temperate regions of the world is the main contributing factor to the very high yields per hectare often achieved by New South Wales growers. In Queensland, a winter and a summer crop are grown.

State statutory marketing boards are responsible for the marketing of the New South Wales and Queensland crops.

RICE: AREA, PRODUCTION AND EXPORTS

Year	Area	Production		Exports	
		Quantity (a)	Gross value	Quantity	Value f.o.b.
	'000 ha	'000 tonnes	\$m	'000 tonnes	\$m
1981-82	122.9	853.9	103.5	596.3	195.4
1982-83	84.8	547.7	88.4	404.7	120.3
1983-84	119.0	632.2	88.9	245.6	91.9
1984-85	122.0	865.7	123.1	341.4	121.7
1985-86	106.6	716.1	80.5	177.9	77.0
1986-87	96.0	608.0	85.1	185.5	73.6

(a) In terms of paddy (or rough) rice.

Oilseeds

Specialised oilseeds

The oilseeds industry is a relatively young industry by Australian agricultural standards. Production has increased rapidly in recent years following changes in relative profitability and agronomic advances. The expected profitability of oilseeds relative to crops such as wheat and coarse grains will continue to influence future production levels in the industry. This profitability will be related to domestic and international markets for protein meals and vegetable fats and oils.

The specialist oilseed crops grown in Australia are sunflower, soybeans, rapeseed, safflower and linseed. Sunflower and soybeans are summer grown while the others are winter crops. In Australia, oilseeds are crushed for their oil, which is used for both edible and industrial purposes and protein meals for livestock feeds.

Oilseed crops are grown in all States but the largest producing regions are the grain growing areas of the eastern States.

For area, production and gross value of several oilseed crops, *see* Crops: area, production and gross value in the Crops section of this chapter.

Sunflower

When crushed, sunflower seed yields a high quality dual purpose oil used primarily to manufacture margarine, salad and cooking oils.

Queensland produces about two-thirds of the Australian crop with the Darling Downs and Central Highlands being the major regions. New South Wales is the next largest producer with the north-west of the State dominating production. Smaller amounts are produced in all other States except Tasmania.

Soybeans

The major uses of soybean oil are in salad and cooking oils and margarine. Small amounts are used in the production of paints, detergents and plastics. Soybeans also yield a high protein feed for livestock with a small proportion used to manufacture adhesives and synthetic fibres and meats.

Queensland and New South Wales produce virtually all of Australia's soybean crop. The main producing areas are the irrigation districts of the Darling Downs and northern New South Wales. Lesser areas include the Burnett and Lockyer regions of Queensland, while production of raingrown soybeans is expanding on the North Coast of New South Wales.

In irrigated areas, soybeans have increasingly been used as a rotational crop for cotton.

Rapeseed

The main use of rapeseed oil has been in salad and cooking oils and in margarine with a small amount being used for industrial purposes.

The major production areas are the tablelands and western slopes of New South Wales followed by the south-east of South Australia and the Western Districts of Victoria. Smaller levels of production occur in the South Coast region of Western Australia.

Following significant increases in the 1960s and 1970s, rapeseed production declined rapidly due to problems of blackleg disease and erucic acid content. Production has recovered in recent years with the development of varieties to overcome these problems and in response to the crop rotation benefits of rapeseed.

Safflower

The oil from safflower is used in the production of cooking oil, margarine, soaps, paints, varnishes, enamels and textiles. In recent years, New South Wales and Queensland together have produced around 90 per cent of Australian output. In Queensland, most production

occurs in the Central Highlands with smaller amounts coming from the Dawson-Callide Valley and the Darling Downs. New South Wales production is centred on the Central West.

Wide fluctuations in safflower production since the mid 1960s have been due to variable seasonal conditions affecting yields and the profitability of other crops which has influenced plantings.

Linseed

The oil from crushed linseed is used in the manufacture of paints, varnishes, technical inks and linoleum.

The main producing areas are the wheat belt of New South Wales, the Darling Downs in Queensland, the Western Districts of Victoria and, to a lesser extent, the south-eastern districts of Victoria. Linseed production has been generally declining in recent years.

Other oilseeds

Peanuts and cottonseed are summer crops grown primarily for human consumption and fibre purposes respectively. The rapid expansion of the cotton industry in recent years has resulted in cottonseed becoming the major oilseed in Australia. Cottonseed oil is used mainly in the manufacture of compound cooking fats and margarine. The least important source of vegetable oils in Australia is peanuts as it is only the low quality kernels which are crushed for oil. Crashings may vary between 3,000 and 7,000 tonnes per annum depending on the quality of the crop. Peanut oil is a high quality oil which is used in the manufacture of margarine and in compound cooking fats and is also used as a cooking and salad oil.

Peanuts

The major peanut growing areas are around Kingaroy in south-east Queensland and the Atherton Tablelands in North Queensland, with smaller pockets of production around Tweed Heads in New South Wales and around Douglas in the Northern Territory.

About 80 per cent of peanuts grown in Australia are of Virginia variety, the remainder being of Spanish types.

Although area planted to peanuts has stabilised in recent years at around 25,000 to 33,000 hectares, production has fluctuated depending on seasonal conditions. Output in 1985-86 is estimated to total some 43,500 tonnes compared with 42,400 tonnes produced in 1984-85.

Local demand for peanuts and peanut products is comparatively static with a limited potential for growth corresponding to population growth. The local growing industry normally supplies most of the domestic demand for edible peanuts in its major outlets: peanut butter, packaged trade and confectionery. Any surplus is sold on export markets. Exports vary according to the size of the crop.

PEANUTS: AREA, PRODUCTION AND GROSS VALUE

<i>Year</i>	<i>Area</i>	<i>Production</i>	<i>Gross value</i>
	'000 hectares	'000 tonnes	\$ million
1981-82	33.4	57.6	37.0
1982-83	35.9	23.3	17.8
1983-84	32.3	47.2	40.2
1984-85	30.0	42.4	36.6
1985-86	29.2	43.4	38.1
1986-87	34.3	48.0	42.0

Cotton

Cotton is grown primarily for its fibre (lint). When the cotton is matured, seed cotton is taken to a gin where it is separated (ginned) into lint, seed and thrash. Lint is used for yarn while seed is further processed at an oil mill. There the short fibres (linters) remaining on the seed after ginning are removed. They are too short to make into cloth but are used for wadding, upholstery and paper. The seeds are then separated into kernels and hulls. Hulls are used for stock feed and as fertiliser, while kernels are crushed to extract oil. The remaining cake is ground into meal which is protein roughage used as stock feed.

Over three-quarters of Australia's total production of cotton lint is grown in New South Wales, principally in the Namoi, Macquarie, Gwydir and McIntyre Valleys and the Bourke area. Irrigation water for these areas is provided from the Keepit, Burrendong, Copeton and Glenlyon Dams and the Darling River. The rest is grown in Queensland, in the Emerald, Biloela, St George, and Darling Downs areas. Most of these areas are also irrigated. Australian production has for some time satisfied most of the requirements of local mills for short and medium staple cotton. Since the mid 1970s there has been very strong investment growth in the cotton industry and the resultant surge in plantings has resulted in large amounts of cotton becoming available for export.

COTTON: AREA, PRODUCTION AND EXPORTS

Year	Area	Seed cotton (a)		Cotton-seed (b)	Lint (c)	Raw cotton export	
		Quantity	Gross value			Quantity	Value f.o.b.
	'000 ha	'000 tonnes	\$m	'000 tonnes	'000 tonnes	'000 tonnes	\$m
1981-82	92.3	324.9	182.0	219.0	134.0	79.2	117.2
1982-83	96.4	285.6	167.5	164.0	101.0	129.2	197.6
1983-84	137.4	400.5	268.8	230.0	141.0	81.5	147.9
1984-85	183.1	679.4	330.2	410.4	248.7	139.7	259.6
1985-86	177.1	684.7	324.9	366.0	256.7	241.2	378.4
1986-87	156.0	612.0	372.5	418.0	212.7	250.8	344.7

(a) Before ginning. (b) Estimated by the Australian Bureau of Agricultural and Resource Economics. (c) Provided by the Raw Cotton Marketing Advisory Committee.

Sugar

Sugar cane is grown commercially in Australia along the east coast over a distance of some 2,100 kilometres in a number of discontinuous areas from Maclean in northern New South Wales to Mossman in Queensland. The geographical spread contributes to the overall reliability of the sugar cane crop and to Australia's record as a reliable sugar supplier.

Approximately 95 per cent of production occurs in Queensland, with some 75 per cent of the crop grown north of the Tropic of Capricorn in areas where rainfall is reliable and the warm, moist and sunny conditions are ideal for the growing of sugar cane. Farm sizes range between 20 and 70 hectares.

Australian cane farmers are regarded as amongst the most efficient in the world and employ a high degree of mechanisation in ploughing, planting, harvesting, and transportation activities. The Australian industry was the first in the world to introduce mechanical cultivation and harvesting techniques and by 1964 the entire industry had converted to bulk handling.

The cane crop is generally planted in April-May and harvested from June to December the following year. The major proportion of each year's crop is from ratoons while in

New South Wales most crops are allowed to grow for two seasons due to the slower growing conditions.

The organisation of the Australian sugar industry is complex. The Queensland Government controls the quantity of raw sugar produced through a system of mill peaks which is translated into cane quotas for growers. In addition the Queensland Government contracts with CSR Limited and Millaquin Sugar Company Pty Limited for the refining, marketing and distribution of home consumption needs, arranges through CSR Limited the export marketing of raw sugar, and regulates the division of industry proceeds between growers and millers.

There are 33 raw sugar mills located throughout the growing regions: 30 are located in Queensland and the remaining three in New South Wales. Fifteen of the mills are cooperatively owned by canegrowers and the remaining eighteen by proprietary companies. Refineries are located in each mainland capital city and at Bundaberg. The six bulk sugar export terminals located in Queensland are at present capable of storing 2.9 million tonnes. While raw sugar is the main product from mills, important by-products are bagasse (fibre), molasses, ash and filter mud.

In recent years sugar cane production has been around 24 million tonnes yielding between 2.8 and 3.3 million tonnes of sugar. Area, production and yield levels for sugar cane from 1981-82 to 1986-87 are provided in the following table.

SUGAR CANE: AREA, PRODUCTION AND YIELD

Year	New South Wales					Queensland				
	Sugar cane cut for crushing			Raw sugar (a)		Sugar cane cut for crushing			Raw sugar (a)	
	Area harvested	Production	Yield	Quantity	Yield	Area harvested	Production	Yield	Quantity	Yield
	'000 ha	'000 tonnes	t/ha	'000 tonnes	t/ha	'000 ha	'000 tonnes	t/ha	'000 tonnes	t/ha
1981-82	14.3	1,505.9	105.4	184.7	12.9	301.7	23,587.9	78.2	3,250.4	10.8
1982-83	16.0	1,702.3	106.5	175.9	11.0	302.5	23,114.8	76.4	3,324.2	11.0
1983-84	15.2	1,468.4	96.7	159.0	10.5	292.0	22,723.0	77.8	3,011.6	10.3
1984-85	14.9	1,540.5	103.6	198.9	13.4	297.8	23,910.0	80.3	3,349.2	11.2
1985-86	15.3	1,398.2	91.1	170.0	11.1	288.3	23,003.5	79.8	3,208.6	11.1
1986-87	24.0	1,276.0	93.2	n.y.a.	n.y.a.	287.0	23,466.0	81.8	n.y.a.	n.y.a.

(a) In terms of 94 net titre.

The domestic market is reserved entirely for sugar produced in Australia. This is achieved by an embargo on the import of sugar. The maximum price of refined sugar for sale to wholesalers and manufacturers is fixed each six months under a formula contained in the Commonwealth-Queensland Sugar Agreement.

Domestic sales account for about 760,000 tonnes annually or approximately 20 per cent of the total industry sales. Granulated sugars account for about 75 per cent of the total domestic sales with liquid sugars (15 per cent), castor sugar (5 per cent), and raw sugar taking up the bulk of the remainder. About two-thirds of the sales of refined sugar products go to processed food and drink manufacturers.

The Australian sugar industry exports about 75 per cent of its annual raw sugar production and is one of the world's largest sugar exporters. The disposal pattern of Australia's sugar production is shown in the following table.

SUGAR: AREA, PRODUCTION, EXPORTS AND CONSUMPTION

Year	Area harvested '000 ha	Production		Exports		Apparent consumption in Australia (a)	
		Sugar cane	Raw sugar	Raw and refined sugar		Total	Per head
		Quantity mil tonnes	Gross value \$m	Quantity mil tonnes	Quantity mil tonnes	Value f.o.b. \$m	'000 tonnes kg
1981-82	315.9	25.1	590.2	3.4	2.5	777.7	710.7 47.2
1982-83	318.5	24.8	508.9	3.5	2.5	557.7	703.0 46.0
1983-84	307.1	24.2	516.6	3.2	2.4	621.3	679.5 43.9
1984-85	312.6	25.4	512.2	3.5	2.5	572.2	692.4 44.2
1985-86	380.0	24.3	494.2	3.4	2.7	613.2	714.1 45.0
1986-87	379.0	24.7	586.4	3.4	3.8	632.5	706.5 43.9

(a) Total quantity of sugar available for consumption in Australia comprises refined sugar and refined sugar contained in manufactured foods.

Australia has regularly participated in arrangements to regulate the international sugar market and was a signatory to the 1984 International Sugar Agreement (ISA). The Agreement is an administrative pact only, and unlike previous Agreements contains no economic provisions. This means that member countries are not constrained in their sugar exports.

Vegetables

Vegetables for human consumption

The area sown to vegetables reached a peak of over 200,000 hectares in 1945, but has remained static at around 109,000 hectares since 1975-76. However, yields from most vegetable crops have increased due to variety breeding for increased yields, greater use of irrigation and better control of disease and insect pests.

Because of the wide climatic range in Australia, supplies for main city markets are drawn from widely different areas, depending on the times of maturity of the various crops. Historically, market gardens were located near urban centres and, while many small scale growers still produce crops close to city markets, urban expansion, rising urban land values, improvements in transport and irrigation, and developments in freezing, canning and drying have extended the industry far from the cities. Transport costs are reduced by the location of processing establishments in producing areas, although city markets still absorb the bulk of fresh and processed produce.

For further information on vegetables see *Year Book* No. 70.

APPARENT CONSUMPTION OF VEGETABLES
(kilograms per capita per year)

Year	Potatoes	Other root and bulb vegetables	Tomatoes	Leafy and green vegetables	Other vegetables	Total, fresh equivalent weight
1981-82	57.6	18.7	16.7	20.8	17.1	130.8
1982-83	52.2	16.9	16.5	21.4	17.9	124.9
1983-84	62.6	17.4	18.6	21.9	18.3	138.8
1984-85	59.9	19.3	19.6	22.5	21.0	142.4
1985-86	57.7	18.9	16.9	22.8	20.0	136.2
1986-87	60.6	18.9	18.0	21.8	19.9	139.3

VEGETABLES FOR HUMAN CONSUMPTION: AREA AND PRODUCTION

Year	<i>French and runner beans</i>	<i>Cabbages</i>	<i>Carrots</i>	<i>Cauli-flowers</i>	<i>Onions</i>	<i>Green peas</i>	<i>Potatoes</i>	<i>Tomatoes</i>	<i>Total vegetables</i>
AREA ('000 hectares)									
1981-82	7.1	(a)2.4	3.9	3.1	4.0	12.1	(a)36.1	9.1	106.7
1982-83	6.7	2.5	3.8	3.3	4.2	14.8	(a)37.4	8.7	110.3
1983-84	6.7	2.5	4.3	3.4	3.8	12.2	37.9	9.1	109.9
1984-85	6.3	2.4	4.6	3.6	4.4	11.4	38.4	9.3	111.0
1985-86	5.9	2.3	4.3	3.6	4.5	11.2	36.1	9.5	110.7
1986-87	5.9	2.9	4.6	3.7	4.3	11.7	36.7	8.6	111.3

<i>Green peas</i>									
Year	<i>French and runner beans</i>	<i>Cabbages</i>	<i>Carrots</i>	<i>Cauli-flowers</i>	<i>Onions</i>	<i>Processing (shelled weight)</i>	<i>Sold in pod (pod weight)</i>	<i>Potatoes</i>	<i>Tomatoes</i>
PRODUCTION ('000 tonnes)									
1981-82	(a)34.6	(a)71.0	112.5	85.4	127.4	38.4	1.7	(a)918.6	228.4
1982-83	33.5	67.2	105.0	76.5	129.0	46.0	1.9	858.5	224.1
1983-84	32.3	72.3	124.3	84.4	115.9	44.0	2.1	1,019.8	258.3
1984-85	31.1	69.5	130.6	101.1	151.7	41.8	2.1	992.1	270.5
1985-86	31.3	69.1	127.6	103.8	159.7	39.7	1.5	964.9	252.6
1986-87	29.4	82.9	146.0	91.6	164.7	33.4	1.2	1,015.2	266.0

(a) Incomplete, information on this commodity was not separately collected in some States.

For further information on vegetables see the following publications: *Crops and Pastures, Australia* (7321.0), *Apparent Consumption of Foodstuffs and Nutrients, Australia* (4306.0) *Value of Agricultural Commodities Produced, Australia* (7503.0), and *Year Book No. 70*.

Fruit (Excluding Grapes)

A wide variety of fruit is grown in Australia ranging from pineapples, mangoes and papaws in the tropics to pome, stone and berry fruits in the temperate regions.

In recent years there has been rapid expansion in the cultivation of many relatively new fruit crops in Australia and there is considerable scope for continued growth in the future.

Avocado is perhaps the most commonly known of these crops and production has expanded considerably during the past decade to a current gross value of over \$10 million. Avocado production is mainly in Queensland and New South Wales with minor quantities produced in Western Australia, South Australia and Victoria.

Kiwifruit is a relatively new temperate fruit crop to Australia. Production has been expanding rapidly mainly in Victoria and New South Wales and further expansion is expected. Of the berry fruits, strawberries are widely grown, with largest production in Victoria and Queensland. Interest in the production of blueberries in Australia has developed only recently and plantings of blueberries have increased rapidly mainly in Victoria and New South Wales. Other berries (currants and raspberries) are grown predominantly in Tasmania and production has been reasonably constant over the past five years.

Tropical fruit such as mangoes, papaws, passionfruit, custard apples and guavas, are grown mainly in Queensland. Smaller quantities of tropical fruit are produced in the north coast region of New South Wales, Western Australia and more recently the Northern Territory. The largest expansion has been of mango production which has more than doubled since

1979. Given the large number of non-bearing mango trees, production is expected to continue to increase dramatically. There is also considerable interest in many other exotic tropical and subtropical fruits. Production of lychees and persimmons has recently commenced and some plantings of rambutan, sapote and longans have been made, mainly in Queensland and the north coast region of New South Wales.

Almond is still the major nut crop in Australia with almost the entire almond crop produced in South Australia and Victoria. Pecan nut production increased substantially in the 1970s, mainly in northern New South Wales. More recently plantings of pistachio trees have commenced in South Australia, Victoria, New South Wales and Western Australia. The major expansion in the nut crops has been with macadamias, a native Australian tree. The main growing regions are the coastal region of northern New South Wales and southern Queensland. During the past decade production of macadamia nuts has increased rapidly to a current gross value of about \$4 million.

SELECTED FRUIT STATISTICS

Year	Orchard fruit: number of trees ('000)				Tropical and other fruits: area (ha)			Total area of fruit (ha)
	Apples	Oranges	Pears	Peaches	Bananas	Pineapples	Other fruit	
1981-82	6,065	6,055	1,703	1,669	8,740	6,373	1,738	102,068
1982-83	6,098	6,219	1,556	1,642	9,040	6,010	1,774	104,325
1983-84	6,066	6,397	1,584	1,646	9,282	6,011	2,085	107,534
1984-85	6,147	6,657	1,548	1,696	9,205	6,268	2,272	109,095
1985-86	6,397	6,777	1,592	1,793	9,640	6,325	2,432	112,655
1986-87	6,350	6,897	1,552	1,797	9,391	3,762	1,245	107,492

Year	Apples	Apricots	Bananas	Cherries	Oranges	Peaches	Pears	Pine-apples	Plums and prunes
	PRODUCTION ('000 tonnes)								
1981-82	294.5	27.1	129.6	5.4	376.3	64.6	109.7	125.5	16.4
1982-83	300.8	26.9	140.5	4.2	410.0	63.0	119.2	111.3	20.6
1983-84	267.0	23.6	146.4	3.5	391.8	48.3	122.1	115.1	20.0
1984-85	352.0	24.5	144.8	3.8	445.0	59.8	138.5	124.5	20.6
1985-86	292.1	29.6	134.4	3.9	496.2	61.4	142.9	131.6	21.7
1986-87	325.0	27.0	157.7	4.0	504.0	61.1	145.0	142.3	22.0
Year	GROSS VALUE OF PRODUCTION (\$ million)								
	Apples	Apricots	Bananas	Cherries	Oranges	Peaches	Pears	Pine-apples	Plums and prunes
1981-82	124.2	18.1	61.4	13.2	89.6	23.0	30.8	20.5	11.2
1982-83	132.4	18.3	70.1	7.9	101.0	21.3	41.9	25.4	16.9
1983-84	134.1	17.6	86.8	8.7	105.3	25.4	45.9	26.2	17.5
1984-85	178.3	19.7	93.2	10.8	131.9	28.3	50.7	33.5	19.8
1985-86	139.0	24.5	101.7	9.5	132.5	29.3	63.7	32.6	23.5
1986-87	204.5	25.5	126.7	11.9	126.1	40.9	76.8	42.0	25.2

Processed fruit and fruit products

After rapid expansion in the 1960s, output of canned fruit declined and then levelled off due to the effects of contracting overseas markets for Australian canned fruit. Production of natural fruit juices has increased markedly in the last decade and this has reflected improvements in marketing methods, effective promotion and public awareness of the nutritional value of natural juices.

FRUIT PRODUCTS
(Derived from the Annual Manufacturing Census and the recorded monthly production)

	Unit	1981-82	1982-83	1983-84	1984-85	1985-86	1986-87
Fruit juice based cordials and syrups (a)	ML	80.4	78.7	86.5	96.1	94.5	99.2
Natural fruit juice (b)—							
Single strength	ML	186.5	201.1	214.1	317.7	n.y.a.	225.7
Concentrated (c)	ML	27.3	32.6	26.5	43.6	n.y.a.	225.7
Cider and perry	ML	19.0	18.4	(d)9.4	(d)9.8	n.y.a.	225.7
Canned or bottled fruit (excl. canned pulp)	'000 tonnes	146.7	157.6	152.0	186.2	179.2	185.3
Jams	'000 tonnes	32.6	29.3	30.3	29.8	29.5	30.4

(a) Containing at least 25 per cent by volume of pure fruit juices. (b) Excludes fruit drinks consisting of diluted fruit juices with or without artificial flavourings. (c) Excludes grape must, and comprises actual quantity of concentrated juices. (d) Excludes alcoholic cider and perry.

APPARENT CONSUMPTION OF FRUIT AND FRUIT PRODUCTS
(kg per capita per year)

Year	Fresh			Jams, conserves, etc.	Dried tree fruit	Processed fruit	Total, fresh equivalent weight
	Oranges	Other citrus	Other fresh fruit				
1981-82	29.5	6.9	37.8	1.8	0.5	10.3	97.4
1982-83	41.4	6.4	39.6	1.8	0.6	9.4	110.6
1983-84	43.4	7.7	38.1	1.8	0.7	9.8	113.3
1984-85	37.8	7.5	41.4	2.1	0.6	11.1	114.6
1985-86	33.7	7.1	42.1	1.9	0.6	8.0	106.9
1986-87	33.3	7.3	40.6	1.9	0.5	7.8	106.4

Fruit exports

The value of exports of fruit and fruit products (excluding grapes) has in most recent years accounted for more than a quarter of the value of the production of fresh fruit. Fresh or chilled fruit (mostly apples, pears and citrus) account for some 40 per cent of this; preserved fruit (mostly canned pears and peaches) make up most of the remainder; only small quantities of dried fruits (other than grapes) are exported. The total value of those exports has been relatively constant in recent years.

FRUIT EXPORTS: VALUE F.O.B.
(\$ million)

Year	Fresh and chilled				Canned or bottled				
	Apples	Pears	Oranges	Apricots	Peaches	Pears	Peaches and pears	Pine-apples	Fruit salad
1981-82	19.0	13.7	8.9	1.0	15.4	13.7	2.1	3.6	7.5
1982-83	15.7	17.8	12.6	1.1	13.8	16.5	2.4	2.2	9.8
1983-84	13.7	15.9	9.4	1.2	13.4	10.9	1.8	2.5	10.7
1984-85	12.0	21.3	14.4	0.4	12.1	17.9	1.4	3.9	10.2
1985-86	17.7	28.5	18.9	0.8	19.3	17.8	1.9	5.2	14.6
1986-87	21.9	34.6	27.0	1.1	24.3	29.5	1.7	6.0	22.1

Fresh apple exports to Europe have been markedly reduced in recent years mainly because of rising shipping costs and improved storage techniques in Europe. On the other hand, markets in other areas such as South-East Asia and the Middle East have been maintained in most years. Fresh pear exports to Europe have also declined but not to the same

extent as apples. Other export markets for pears, such as South-East Asia, have gained importance in recent years. Exports of citrus, predominantly oranges, were relatively steady at around 30,000 tonnes for the five years to 1984-85 but increased rapidly to an estimated 50,000 tonnes in 1986-87. Citrus exports are sensitive to competition from the United States. Exports of oranges were made to Japan for the first time in 1983-84, and sales in subsequent years have been steadily expanding. The Australian industry believes there is a potentially very important trade with Japan.

FRUIT: VALUE OF PRODUCTION AND EXPORTS
(\$ million)

Year	Gross value			Exports (a) value f.o.b.
	Orchard fruit	Tropical, berry and other	Total	
1981-82	365	99	464	122
1982-83	396	113	509	135
1983-84	418	135	552	117
1984-85	522	149	671	152
1985-86	518	161	679	196
1986-87	634	203	837	242

(a) Fruit and nuts, excluding grapes (fresh and dried); includes fresh, dried and preserved and fruit preparations.

Fruit imports

Small but increasing quantities of fresh fruit, mainly off-season citrus from the United States, are imported, while most imports of dried fruit consist of dates from China and Pakistan and dried apricots from Turkey. Imports of orange juice increased to a peak of 106 million litres in 1983-84, but have since declined to 55 million litres in 1985-86.

Marketing and regulation of the fruit industry

Apples and pears

The Australian Apple and Pear Corporation has the function of promoting and controlling the export of Australian apples and pears as well as the promotion of trade and commerce in apples and pears within Australia. It also has power to promote, or engage in, research relating to the production, packaging, handling, transportation or marketing of apples and pears and to promote new apple and pear products.

The current underwriting schemes for export apples and pears terminate at the end of the 1990 export season. Under the schemes, the government guarantees a minimum export return separately for 'at risk' and forward sales of apples and pears which is equal to 85 per cent of the average export returns in the last three of the previous four years. If the average export return for any of the four categories of exports should fall below the bigger price in any year, the government will make up the difference without limit.

Canned fruit

On 29 November 1979 the Commonwealth enacted legislation restructuring the industry's marketing arrangements. Similar complementary legislation has been enacted by the four States of New South Wales, Victoria, South Australia and Queensland.

Under the legislation, the Australian Canned Fruits Corporation (replacing the Australian Canned Fruits Board) is empowered to acquire and sell the production of canned apricots, peaches and pears and is responsible for determining prices, terms and conditions for sales

in both Australian and export markets. Sales are made through markets nominated by canners and approved by the Corporation. Markets are classified as Pool and Non-Pool with returns from Pool markets equalised by the Corporation. Entitlements for sales in Pool markets are allocated to canners prior to the start of each season.

The Corporation's administrative expenses are financed by a levy imposed on the production of canned fruits under the *Canned Fruits Levy Act 1979*.

The Corporation is advised in the performance of its functions by the Australian Canned Fruits Industry Advisory Committee.

In October 1984, the operation of the Australian Canned Fruits Corporation (ACFC) was extended for a further three years to the end of 1987. A more commercially orientated and flexible corporation was achieved with the expansion of the Corporation's board to make it more effective in its commercial operations, more accountable to industry and government and more capable of achieving its objective of improving returns to growers.

For further data on fruits and fruit products see the publications *Fruit, Australia* (7322.0), *Production Bulletin No. 3: Food, Drink and Tobacco, Australia* (8359.0), *Apparent Consumption of Foodstuffs and Nutrients, Australia* (4306.0) and *Value of Agricultural Commodities Produced, Australia* (7503.0)

Grapes

Grapes are a temperate crop which require warm to hot summer conditions for ripening and predominantly winter rainfall. Freedom from late spring frosts is essential. They are grown for wine-making, drying and, to a lesser extent, for table use. Some of the better known wine producing areas are the Barossa, Clare, Riverland, Southern Districts and Coonawarra (SA); North-Eastern Victoria and Great Western (Vic.); Hunter and Riverina (NSW); Sunraysia (NSW and Vic.); Swan Valley and Margaret River (WA).

Nearly all the dried fruit is produced along the River Murray and its tributaries in Victoria and New South Wales with small localised areas in other States.

VITICULTURAL STATISTICS: AREA, PRODUCTION AND VALUE

Year	Area		Productions: grapes used for—			
	Bearing	Total	Winemaking	Drying	Total (a)	
					Quantity	Gross value
	'000 ha	'000 ha	'000 tonnes fresh weight	'000 tonnes fresh weight	'000 tonnes fresh weight	\$m
1981-82	63.7	68.4	499.9	361.7	884.9	222.8
1982-83	61.9	66.5	431.3	310.3	768.1	212.5
1983-84	60.2	64.5	495.1	320.0	840.9	217.0
1984-85	59.9	64.0	559.0	296.8	889.6	259.4
1985-86	60.0	63.8	509.9	358.8	906.6	270.0
1986-87	54.0	57.0	477.0	262.3	782.6	272.2

(a) Includes grapes used for table and other purposes.

Multipurpose grapes are used predominantly for winemaking and drying, the latter process being particularly susceptible to adverse seasonal conditions. A serious oversupply of dried vine fruit existed on world markets in 1983 and 1984, however the situation has improved since 1985 as a consequence of reduced production from northern hemisphere suppliers in late 1984. Australian exporters have made significant sales on international markets. The Australian Dried Fruits Corporation is the body responsible for the organisation of the export trade in dried vine fruits. The Corporation also administers the statutory Dried Vine Fruits Equalisation Scheme and the Dried Sultana Production Underwriting Scheme. Both these schemes were restructured by the government in 1985 following an inquiry into the dried vine fruits industry by the Industries Assistance Commission. The Government's objective was to make the industry more responsive to market signals. Until 1983, imports

of dried vine fruit had been largely insignificant. However, since that time significant imports have occurred each year, the major sources being Greece and the United States. The Australian industry has demonstrated injury from subsidised imports from Greece and countervailing measures have been implemented.

Varietal statistics: 1987 season

VITICULTURE: AREA AND PRODUCTION BY VARIETY, 1987 SEASON (a)

	Area of vines at harvest			Grubbings (actual and/or intended)	Production			
	Bearing	Not yet bearing	All vines		Grapes used for—			Total
					Wine- making	Drying	Other	
Red grapes—								
Cabernet								
Sauvignon	3,249	218	3,466	51	24,676	—	—	24,676
Currant (incl.								
Carina)	1,362	106	1,467	45	5	18,078	14	18,097
Grenache	2,321	9	2,330	185	30,686	—	61	30,747
Mataro	703	1	703	66	9,952	—	17	9,968
Pinot Noir	448	221	669	1	3,162	—	—	3,162
Shiraz	4,955	48	5,003	262	48,873	—	34	48,907
Other red grapes	1,021	245	1,266	22	8,252	49	1,852	10,153
Total red grapes	15,819	1,096	16,915	749	128,525	18,126	10,845	157,496
White grapes—								
Chardonnay	2,102	523	2,625	7	18,594	—	—	18,594
Doradillo	1,145	11	1,156	74	29,138	62	30	29,230
Muscat Blanc	457	57	514	24	5,597	—	45	5,642
Muscat Gordo								
Blanco	3,942	236	4,179	96	76,654	17,032	408	94,094
Palomino and								
Pedro Ximenes	1,478	14	1,492	122	25,595	—	12	25,606
Rhine Riesling	3,702	67	3,769	113	40,005	—	20	40,025
Semillon	2,477	146	2,623	39	36,636	—	—	36,636
Sultana	15,941	402	16,343	405	40,407	219,639	23,366	283,412
Waltham Cross	1,282	29	1,311	115	2,295	8,618	4,258	15,171
Other white grapes	603	73	676	44	7,940	52	644	8,636
Total white								
grapes	38,252	2,014	40,266	1,252	350,251	245,462	32,558	628,271
Total grapes	54,071	3,110	57,181	2,001	478,776	263,588	43,403	785,767

(a) Varietal data not collected in Northern Territory and the Australian Capital Territory.

DRIED VINE FRUIT: PRODUCTION, EXPORTS AND CONSUMPTION (dried weight)

Year	Production				Exports		Total		Consump- tion of dried vine fruit
	Raisins	Sultanas	Currants	Total	Raisins/ sultanas	Currants	Quantity	Value f.o.b.	
	'000	'000	'000	'000	'000	'000	'000	\$m	
	tonnes	tonnes	tonnes	tonnes	tonnes	tonnes	tonnes	kg	
1981-82	5.8	78.5	5.9	90.2	38.5	0.8	39.4	49.5	1.8
1982-83	3.9	64.9	4.7	73.4	57.1	2.4	59.5	59.7	1.9
1983-84	1.4	69.0	4.6	75.0	51.6	0.9	52.5	54.1	1.7
1984-85	2.1	60.1	5.7	67.8	61.5	1.0	62.4	58.0	2.3
1985-86	5.2	72.9	6.3	84.4	48.4	2.9	51.3	71.3	2.3
1986-87	1.9	58.8	5.2	65.9	54.5	2.3	56.8	96.5	1.9

Wine industry

Australia produces a wide range of wine and brandy products. Over the past twenty years there has been a distinct trend towards greater production and consumption of unfortified or table wines. In the twelve months ending June 1987 sales of table wine accounted for nearly 78 per cent of all sales of Australian wine. The large growth in table wine sales has been principally due to the successful marketing of wine in 'casks' (usually fibreboard, box-shaped, 4 litre containers equipped with dispensing faucets).

While imports of wine are relatively insignificant (2.2 per cent of the apparent domestic market), exports are becoming increasingly important and now account for 6.5 per cent of production. Legislation reconstructing the Australian Wine and Brandy Corporation as the body responsible for the control of the export trade in wine, brandy and grape spirit products was enacted in June 1986. The Corporation has the power to regulate exports as well as organise promotion and publicity functions in export markets and in Australia.

PRODUCTION, CONSUMPTION AND EXPORT OF WINES

Year	Pro- duction	Exports		Consump- tion in Australia per capita
		Quantity	Value	
			f.o.b.	
	mil. litres	mil. litres	\$m	litres
1981-82	402.7	8.4	14.0	19.1
1982-83	340.1	8.0	13.4	19.7
1983-84	396.2	9.0	16.8	20.4
1984-85	451.2	8.8	17.4	21.3
1985-86	389.2	10.9	21.3	21.6
1986-87	371.6	21.2	44.6	21.0

For further details on viticulture, dried vine fruit, wine, etc. see the following publications: *Fruit, Australia* (7322.0), *Sales and Stocks of Australian Wine and Brandy* (8504.0) and *Viticulture, Australia* (7310.0).

Miscellaneous Crops

The principal crops not covered above include fodder crops, tobacco, hops and mushrooms which in 1986-87 had gross values as follows:

Crops	Gross value	Per cent of total crop gross value
	\$m	%
Fodder crops (hay)	79.1	1.0
Lupins	135.9	1.8
Tobacco	65.0	0.8
Hops	8.1	0.1
Mushrooms	50.7	0.7
Other (incl. nurseries)	585.0	7.6

Fodder crops

As well as crops specifically for grain, considerable areas of Australia are devoted to fodder crops. These crops are utilised either for grazing (as green feed), or conserved as hay, ensilage, etc.

This development of fodder conservation as a means of supplementing pasture and natural sources of stockfeed is the result of the seasonal and comparatively unreliable nature of rainfall in Australian agricultural areas.

FODDER CROPS: AREA AND PRODUCTION

Year	<i>Hay (a)</i>				
	Area	Production		<i>Green feed or silage (b)</i>	
		Quantity	Gross value	Area	Silage made
	'000 ha	'000 tonnes	\$m	'000 ha	'000 tonnes
1981-82	380	1,043	77.1	936	413
1982-83	408	907	100.6	1,292	301
1983-84	377	1,269	99.5	896	698
1984-85	258	848	60.3	876	502
1985-86	252	773	64.5	1,005	620
1986-87	306	942	72.9	1,191	679

(a) Principally oaten and wheaten hay. (b) Principally from oats, barley, wheat and forage sorghum.

Lupins

Lupins are grown primarily as a grain crop, but grazing of standing crops and stubble is also an important use. Because of their high protein content, lupins are becoming increasingly important in livestock feed and for human consumption, particularly in some of the Asian countries.

There has been a significant expansion of lupin production in recent years, particularly in Western Australia which is the major producer and exporter of lupins. Smaller quantities are also grown in New South Wales, Victoria and South Australia mainly for domestic use.

FARMSTOCKS OF CEREAL GRAINS, HAY AND SILAGE (^{'000 tonnes})

At 31 March	<i>Cereal grains</i>				
	<i>Barley</i>	<i>Oats</i>	<i>Wheat</i>	<i>Hay</i>	<i>Silage</i>
1982	628	1,356	832	4,941	502
1983	506	711	970	2,983	333
1984	627	1,705	1,021	6,789	642
1985	684	1,479	910	5,872	697
1986	872	1,403	1,185	5,555	851
1987	729	1,406	1,045	5,783	817

Tobacco

Tobacco is a summer-growing annual which requires a temperate to tropical climate, adequate soil moisture and a frost-free period of approximately five months. In Australia, all tobacco is grown under irrigation. Because of specialised requirements, production is limited to areas with suitable soils and climate. The main centres of production are the Mareeba-Dimbulah districts of north Queensland and Myrtleford in north-eastern Victoria. Other areas where tobacco is grown include Bundaberg, Beerwah and Texas (Queensland) and Yetman and Coraki (New South Wales). All tobacco grown in Australia is of the flue-cured type except for small quantities of burley tobacco produced mainly in Victoria.

TOBACCO: AREA, PRODUCTION AND OVERSEAS TRADE

Year	Area '000 ha	Production (dried leaf) '000 tonnes	Exports (value f.o.b.)		Imports (value)	
			Unmanu- factured	Manu- factured	Unmanu- factured	Manu- factured
			\$'000	\$'000	\$'000	\$'000
1981-82	6.6	13.3	2,080	8,551	46,268	23,187
1982-83	6.7	13.4	4,835	9,667	52,916	30,420
1983-84	6.5	14.4	2,434	12,172	58,939	31,425
1984-85	5.4	12.5	110	14,545	59,789	27,692
1985-86	4.7	10.7	158	15,021	64,495	33,197
1986-87	5.1	12.2	149	17,157	82,523	33,617

Marketing

In 1965 the Commonwealth and State Governments agreed to a stabilisation plan which provided for an annual Australian tobacco leaf marketing quota of flue-cured tobacco and a guaranteed minimum average reserve price. The plan is administered by the Australian Tobacco Board, constituted under the *Tobacco Marketing Act 1965*, and is composed of representatives of the Commonwealth Government, tobacco-growing States, growers and manufacturers.

Following a review by the Industries Assistance Commission of the tobacco industry in 1982, the Government announced a new 5-year stabilisation scheme which began in 1984. The new scheme is designed to rationalise marketing arrangements in the industry. The scheme provides that the annual tobacco leaf quotas are adjusted in line with consumption, that manufacturers' stocks are reduced to a level equivalent to 13 months' consumption by 1988, and that prices be adjusted so as to significantly reduce the gap between Australian and world prices by 1990.

Hops

Hops are grown from perennial rootstocks over deep, well-drained soils in localities sheltered from the wind. The hop-bearing vine shoots are carried upon trellises, from which they are later harvested. The green hops are kiln-dried and baled on the farm. The dried hops can be further processed at centralised processing establishments into pellets, extract or high density packs. The pelleted form constitutes the bulk of the exported hops.

The area planted to hops in Australia is about 1,300 hectares. About 65 per cent of plantings are in Tasmania (confined to the Derwent, Huon and Channel areas in the south-east, the Scottsdale-Ringarooma district in the north-east, and the Gunn Plains in the north-west of the State). The other hop producing areas are the Ovens and King Valleys in Victoria and a small area near Manjimup in Western Australia.

Australian hop production is about 2,600 tonnes, approximately 70 per cent of which is used by domestic breweries, with the remainder being exported.

Mushrooms

Statistics of mushroom growing were collected for the first time in all States for the year ended 30 June 1975.

MUSHROOMS: AREA, PRODUCTION, GROSS VALUE AND IMPORTS

Year	Total production				Imports			
	Area	Quantity	Gross value	Canned or bottled production	Dried		Canned or bottled	
					Quantity	Value f.o.b.	Quantity	Value f.o.b.
	hectares	tonnes	\$m	tonnes	tonnes	\$'000	'000 litres	\$'000
1981-82	57	9,382	21.7	4,776	120	1,478	6,413	8,454
1982-83	65	10,266	27.1	n.p.	58	895	5,845	8,447
1983-84	69	11,036	29.4	n.p.	94	1,447	4,760	7,218
1984-85	76	12,857	36.7	n.p.	92	1,449	4,426	8,278
1985-86	70	13,026	43.8	n.p.	81	1,669	3,201	6,426
1986-87	76	15,203	50.7	n.p.	76	1,742	5,180	9,238

Jojoba

Jojoba is an arid zone perennial shrub native to the Sonoran Desert in the United States and Mexico where it has a reputation for its ability to survive and grow under extremely adverse conditions. About 50 per cent of seed weight consists of a high quality liquid wax suitable for a wide range of industrial applications.

Attempts are being made to establish a jojoba growing and processing industry in Australia using wild, unimproved planting material. Research in this country has investigated the environmental factors controlling flowering and fruit growth, the physiological basis of jojoba's adaptation to moisture and temperature extremes, and the sites with the best potential to support an industry.

The future development of a jojoba industry depends upon the use of improved, high-yielding plant lines and the selection of the best plantation sites. Although there are many proposed uses for the wax, future market size and price structure are unknown.

Livestock

Since 1861, annual enumerations of livestock 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 ten-yearly intervals from 1861 to 1971, and then from 1981 on by single years, are given in the following table.

LIVESTOCK, AUSTRALIA
('000)

Year	Cattle	Sheep	Pigs	Year	Cattle	Sheep	Pigs
1861	3,958	20,135	351	1951	15,229	115,596	1,134
1871	4,276	41,594	543	1961	17,332	152,679	1,615
1881	7,527	62,184	816	1971	24,373	177,792	2,590
1891	10,300	97,881	891	1981	25,168	134,407	2,430
1901	8,640	70,603	950	1982	24,553	137,976	2,373
1911	11,745	98,066	1,026	1983	22,478	133,237	2,490
1921	13,500	81,796	674	1984	22,161	139,242	2,527
1931	11,721	110,568	1,072	1985	22,738	149,747	2,512
1941	13,256	122,694	1,797	1986	23,436	155,561	2,553
				1987	21,915	149,157	2,611

While livestock numbers (particularly sheep) have increased substantially since 1861, marked fluctuations have taken place during the period, mainly on account of widespread droughts which have from time to time left their impressions on the pastoral history of Australia.

Australia has suffered ten major widespread droughts since the keeping of rainfall records began:

- 1864–1866 All States were affected except Tasmania.
- 1880–1886 Southern and eastern mainland States were affected.
- 1888 All States were hit except Western Australia.
- 1895–1903 This drought, one of the worst on record, halved Australia's sheep population (originally 100 million) and cut cattle numbers (12 million) by 40 per cent.
- 1911–1916 Wheat crops were affected in most States, sheep numbers declined by 19 million and cattle by 2 million.
- 1918–1920 During this period, parts of Western Australia were the only areas completely free from drought.
- 1939–1945 This prolonged drought affected crops and/or pastoral areas in all States. Sheep numbers fell from 125 million in 1942 to 96 million in 1945.
- 1965–1967 This drought, in its impact on Queensland, New South Wales and Victoria, ranked with the 1902 drought as one of the most severe on record. It resulted in a 40 per cent drop in the wheat harvest, a loss of 20 million sheep, and a decrease in farm income of \$300–500 million. There was a chain reaction to other industries, with heavy losses being suffered by manufacturers of farm machinery and the New South Wales Railways. Effects of the drought were worsened by water rationing in irrigation areas.
- 1972 Widespread drought occurred throughout Australia.

Much of eastern Australia experienced one of the worst droughts on record in 1982 and early 1983. Widespread and soaking rains during the autumn months of 1983 greatly alleviated the situation and most areas received further good rains during 1983–84. However, 1985 saw the return of light and variable rainfall conditions. In July 1985, much of New South Wales and western Queensland had again been drought declared and regional areas of concern were notified in western Victoria, parts of South Australia and Western Australia, and much of the Northern Territory. Good rains during August 1985 relieved much of this problem.

For further details of droughts in Australia *see* the special article at the end of Chapter 16 in *Year Book* No. 71.

The years in which the numbers of livestock attained their peaks are as follows: cattle, 1976 (33,434,000); sheep, 1970 (180,080,000); and pigs, 1973 (3,259,000).

Cattle

Cattle-raising is carried out in all States, the main object in certain districts being the production of stock suitable for slaughtering purposes and in others the raising of dairy herds. While dairy cattle are restricted mainly to southern and to coastal districts, beef cattle are more widely distributed. Cattle numbers in Australia increased slowly during the 1960's and 1970s, despite seasonal changes and heavy slaughterings, to a peak of 33.4 million in 1976. There was a continuous decline, aggravated by drought conditions, to 22.2 million in 1984. Improved seasonal conditions and higher export prices in 1984 encouraged producers to commence rebuilding herds and numbers increased to 23.4 million in 1986.

Beef cattle production is often combined with cropping, dairying and sheep. In the north (north of the 26th parallel), cattle properties and herd size are very large, pastures are generally inimproved, fodder crops are rare and beef is usually the only product. The

industry is more intensive in the south because of the more favourable environment including more improved pasture.

For further details on cattle, see *Livestock and Livestock Products, Australia* (7221.0).

CATTLE NUMBERS
(^{'000})

<i>31 March</i>	<i>NSW</i>	<i>Vic.</i>	<i>Qld</i>	<i>SA</i>	<i>WA</i>	<i>Tas.</i>	<i>NT</i>	<i>Aust. (incl. ACT)</i>
1982	5,429	4,121	9,782	1,013	1,942	628	1,624	24,553
1983	5,018	3,408	9,349	828	1,754	562	1,548	22,478
1984	5,036	3,487	9,154	813	1,730	542	1,390	22,161
1985	5,226	3,576	9,413	846	1,673	554	1,484	22,784
1986	5,409	3,720	9,662	914	1,690	570	1,458	23,436
1987	4,868	3,478	9,012	912	1,659	535	1,439	21,915

CATTLE NUMBERS, BY AGE, SEX, PURPOSE
(^{'000})

	<i>31 March—</i>					
<i>Classification</i>	<i>1982</i>	<i>1983</i>	<i>1984</i>	<i>1985</i>	<i>1986</i>	<i>1987</i>
Milk cattle—						
Bulls used or intended for service	49	47	46	45	43	37
Cows, heifers and heifer calves	2,661	2,642	2,693	2,697	2,655	2,561
House cows and heifers	73	69	66	63	61	41
Total	2,783	2,757	2,805	2,806	2,759	2,639
Meat cattle—						
Bulls used or intended for service	527	499	498	524	554	513
Cows and heifers (1 year and over)	11,032	9,929	9,964	10,274	10,626	9,795
Calves under 1 year	5,023	4,644	4,455	4,897	5,010	4,738
Other cattle (1 year and over)	5,188	4,649	4,438	4,282	4,487	4,230
Total	21,770	19,721	19,356	19,978	20,678	19,276
Total, all cattle	24,553	22,478	22,161	22,784	23,436	21,915

Sheep

With the exception of a short period in the early 1860s, when the flocks in Victoria outnumbered those of New South Wales, the latter State has occupied the premier position in sheep raising. Western Australia is the second largest sheep raising State, followed by Victoria. Sheep numbers reached a peak of 180.0 million in Australia in 1970. They then declined rapidly up to March 1973 as producers turned off large numbers for slaughter and moved from wool-growing towards grain and beef production. By 1975, the numbers had again increased to 151.7 million, but in March 1978 the numbers had fallen to 131.4 million, the lowest since 1955. Improved seasonal conditions during 1978 and 1979 enabled producers to begin rebuilding their flocks. By March 1980, numbers had risen to 136.0 million. Subsequently, high levels of drought-induced slaughter led to a decline in numbers to 134.4 million by March 1981. Numbers rose to 138.0 million in March 1982 with improved seasonal conditions and the attractiveness of sheep enterprises relative to cattle contributing to the growth in numbers. Subsequently, drought conditions saw the flock reduce to 133.2 million in March 1983. The increase in flock numbers to 139.2 million in March 1984 reflects flock rebuilding by producers in response to favourable seasonal conditions beginning in the autumn of 1983, improved lambing rates, and a favourable outlook for wool and live sheep enterprises. This trend continued and, in March 1986, flock numbers reached 155.6 million.

SHEEP NUMBERS
(millions)

<i>31 March</i>	<i>NSW</i>	<i>Vic.</i>	<i>Qld</i>	<i>SA</i>	<i>WA</i>	<i>Tas.</i>	<i>Aust. (incl. NT, ACT)</i>
1982	48.7	25.3	12.3	16.7	30.3	4.5	138.0
1983	48.1	22.7	12.2	15.4	30.2	4.5	133.2
1984	51.0	24.6	13.0	16.4	29.5	4.6	139.2
1985	55.5	26.5	14.0	17.3	31.6	4.8	149.7
1986	58.0	26.9	14.3	17.9	33.2	5.1	155.6
1987	52.2	26.6	14.6	17.2	33.5	5.0	149.2

SHEEP, BY AGE AND SEX
(millions)

	Sheep: 1 year and over				Lambs and hoggets (under 1 year)	Total, sheep and lambs
31 March	Rams	Breeding ewes	Other ewes	Wethers		
1982	1.8	68.5	4.8	30.5	32.4	138.0
1983	1.7	65.6	5.5	28.8	31.6	133.2
1984	1.7	70.3	4.9	30.5	31.8	139.2
1985	1.8	71.0	5.4	33.3	38.3	149.7
1986	1.8	72.1	6.6	38.7	36.3	155.6
1987	1.7	72.1	4.2	37.5	33.6	149.2

The combined value of wool and sheep slaughtered during 1985-86 is estimated at 20.5 per cent of the gross value of agricultural commodities. This proportion varies with wool and meat prices and seasonal conditions. Australia has about 20 per cent of the world's woolled sheep but produces around 25 per cent of the world's greasy wool output. In addition, in the year ended 30 June 1986 the sheep industry produced 578,000 tonnes of mutton and lamb. Exports of live sheep for slaughter during the same period totalled 6.4 million head, with Kuwait and Saudi Arabia accounting for 61 per cent of the total.

SHEEP AND LAMBS: ANALYSIS OF MOVEMENT IN NUMBERS
(millions)

<i>Year ended 31 March</i>	<i>Season</i>	<i>Number at beginning of season</i>	<i>Lambs marked</i>	<i>Live sheep exports</i>	<i>Sheep and lambs slaughtered (a)</i>	<i>Estimated deaths on farms (b)</i>	<i>Number at end of season</i>
1982	1981-82	134.4	44.8	6.3	28.3	6.6	138.0
1983	1982-83	138.0	45.4	6.2	30.8	13.1	133.2
1984	1983-84	133.2	44.5	6.6	25.0	6.8	139.2
1985	1984-85	139.2	51.9	6.3	27.2	7.9	149.7
1986	1985-86	149.7	49.8	6.8	31.5	5.7	155.6
1987	1986-87	155.6	48.3	7.1	32.5	5.2	159.1

(a) Comprises statistics from abattoirs and other major slaughtering establishments and includes estimates of animals slaughtered on farms and by country butchers; also includes animals condemned or those killed for boiling down.
(b) Balance item.

LAMBING

<i>Year ended 31 March</i>	<i>Season</i>	<i>Number of breeding ewes at start of season</i>	<i>Mating intentions at start of season</i>	<i>Actual matings</i>	<i>Ratio of actual matings to intended matings</i>	<i>Lambs marked</i>	<i>Ratio of lambs marked to actual matings</i>	<i>Ratio of lambs marked to breeding ewes</i>
		million	million	million	%	million	%	%
1982	1981-82	66.9	61.9	60.5	98	44.8	74	67
1983	1982-83	68.5	64.6	60.9	94	45.4	74	66
1984	1983-84	65.6	58.9	58.5	99	44.5	76	68
1985	1984-85	70.3	65.9	63.5	96	51.9	82	74
1986	1985-86	71.0	65.3	62.8	96	49.8	79	70
1987	1986-87	68.0	64.3	60.8	95	47.3	78	69

Pigs

Over the past 30 years there have been significant changes to the structure of the Australian pig industry. Initially, pigs were raised as part of a dairying operation where there were abundant supplies of liquid skim milk. Today, however, with introduction of factory separation of milk and cream, coupled with the low grain prices of the 1960s, pig raising has become more and more associated with grain production.

In addition there has been a major move away from the so called extensive method of pig raising to the intensive conditions that apply today. This has meant an increase in the capital investment in the industry and a greater degree of specialisation in pig raising. The average pig production unit today would be based on approximately 300 sows with feeds being almost exclusively grain based. While the number of sows in Australia has remained fairly constant the number of pig farmers has decreased.

PIGS NUMBERS
('000)

<i>31 March</i>	<i>NSW</i>	<i>Vic.</i>	<i>Qld</i>	<i>SA</i>	<i>WA</i>	<i>Tas.</i>	<i>Aust. (incl. NT, ACT)</i>
1982	766	406	513	374	263	47	2,373
1983	794	387	551	405	300	51	2,490
1984	799	404	556	417	300	48	2,527
1985	814	410	563	402	274	47	2,512
1986	798	432	585	414	278	45	2,553
1987	830	432	579	422	295	46	2,611

Poultry

The commercial poultry industry comprising hatcheryworkers, egg producers and broiler growers is highly specialised, although a proportion of production comes from 'backyard' egg producers, roughly estimated at from 20 to 25 per cent of the total. There are also separate research schemes funded jointly by industry and government for the egg and meat chicken industries but close liaison exists. Both sectors are good examples of specialised, large scale, capital-intensive production.

POULTRY NUMBERS (a)
(^{'000})

31 March	<i>Chickens</i>			<i>Other poultry</i>			<i>Total all poultry</i>
	<i>Hens and pullets for egg production</i>	<i>Meat strain chickens (broilers)</i>	<i>Total chickens (b)</i>	<i>Ducks</i>	<i>Turkeys</i>	<i>Other poultry</i>	
1982	14,930	27,478	44,761	317	713	213	46,004
1983	15,532	30,296	48,389	294	467	243	49,393
1984	14,075	31,318	47,529	370	535	239	48,673
1985	13,497	33,761	50,109	219	653	293	51,273
1986	13,752	35,619	51,807	288	580	378	53,053
1987	13,506	39,187	55,579	350	1,126	430	57,608

(a) Data are for numbers of poultry on agricultural establishments as reported in the annual Agricultural Census. (b) Includes breeding stock and data not available for separate publication.

For further details on pigs and poultry see publication *Livestock and Livestock Products, Australia* (7221.0).

Meat Production, Slaughtering and Other Disposals

The ABS collects details of slaughtering and meat production from abattoirs, commercial poultry and other slaughtering establishments and includes estimates of animals slaughtered on farms and by country butchers. The data relate only to slaughtering for human consumption and do not include animals condemned or those killed for boiling down.

PRODUCTION OF MEAT BY TYPE (a)
(^{'000} tonnes)

Year	<i>Carcass weight</i>					<i>Dressed weight (b)</i>	
	<i>Beef</i>	<i>Veal</i>	<i>Mutton</i>	<i>Lamb</i>	<i>Pig meat</i>	<i>Total meat</i>	<i>Total all poultry (c)</i>
1981-82	1,526	50	234	277	228	2,316	286
1982-83	1,482	61	250	280	239	2,313	314
1983-84	1,303	42	169	296	253	2,064	298
1984-85	1,271	39	215	301	260	2,086	345
1985-86	1,344	41	258	320	269	2,232	367
1986-87	1,469	39	285	297	282	2,373	384

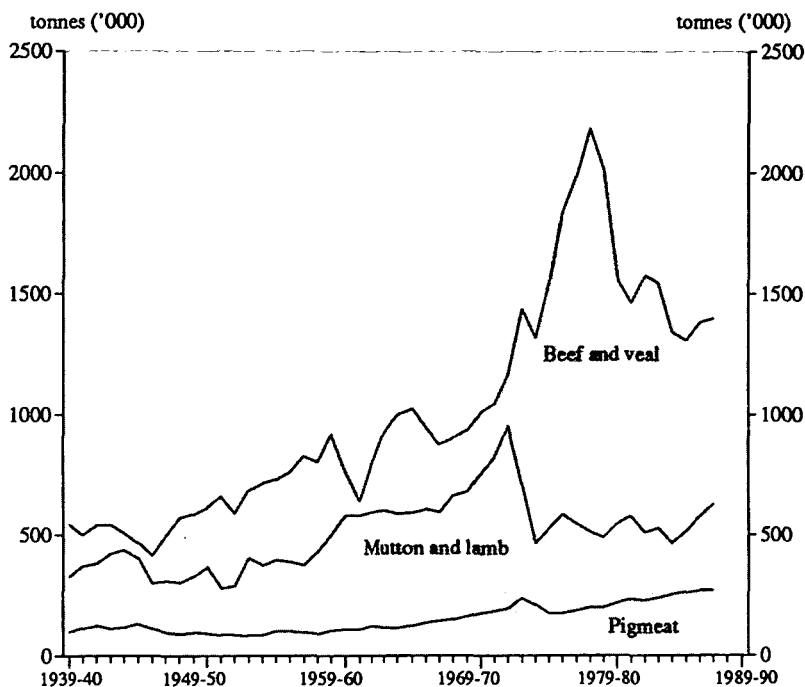
(a) Excludes offal. (b) Dressed weight of whole birds, pieces and giblets. (c) Includes other fowls, turkeys, ducks and drakes.

NUMBERS OF LIVESTOCK AND POULTRY SLAUGHTERED FOR HUMAN CONSUMPTION
(million head)

Year	<i>Cattle</i>	<i>Calves</i>	<i>Sheep</i>	<i>Lambs</i>	<i>Pigs</i>	<i>Chickens (a)</i>	<i>Other fowls (b) and turkeys</i>	<i>Ducks and drakes</i>
1981-82	7.2	1.5	11.9	16.3	4.1	205.9	10.0	2.0
1982-83	7.4	1.7	13.1	16.9	4.2	226.2	10.9	1.9
1983-84	6.0	1.3	8.4	17.1	4.4	216.2	10.2	1.7
1984-85	5.8	1.2	10.5	17.5	4.5	244.2	10.7	2.1
1985-86	6.2	1.2	12.9	19.1	4.5	258.4	11.8	2.3
1986-87	6.7	1.2	14.5	17.7	4.7	249.4	11.2	2.1

(a) Comprises broilers, fryers and roasters. (b) Comprises hens, roosters, etc.

PRODUCTION OF MEAT, AUSTRALIA
1939-40 to 1986-87



Mutton and lamb

Production of sheepmeats in Australia is closely associated with the wool industry. Sheep grazing often occurs on mixed farms in conjunction with beef and/or grain enterprises and in some areas producers specialise in lamb production. The supply of sheepmeat depends greatly on seasonal conditions, decisions to build up or reduce flock numbers, expectations of wool prices, live sheep exports and the pattern of domestic consumption of meat.

There was a movement out of sheep raising in Australia early in the 1970s, principally as a result of low wool prices, and many producers diversified into cattle and grains. Flock numbers declined from a peak of 180.0 million in 1970 to a low of 131.0 million by 1978. After 1978, wool and sheepmeat prices improved and the trade in live sheep for slaughter overseas continued to expand. As a result, the national flock size increased slightly to 136.0 million by March 1980. Since March 1980, flock numbers have fluctuated as a result of climatic and market conditions peaking at 138.0 million in March 1982, before dropping to 133.2 million in March 1983. Total Australian sheep flock in March 1988 was 154 million head.

Sheepmeat production declined rapidly from the high levels of the early 1970s, which were associated with flock reduction, to annual levels of between 400,000 and 600,000 tonnes from 1973-74. Lamb production declined from a peak of 316,000 tonnes in 1985-86 to 294,000 in 1987-88, while mutton production has varied between 230,000 and 300,000 tonnes in recent years until 1983-84, when it declined to 169,000 tonnes. Production increased to 289,000 tonnes in 1987-88.

A high proportion of lamb is consumed in Australia with per capita consumption remaining steady at about 14-16 kilograms per year. A high proportion of mutton produced is exported. Australia is the world's largest exporter of mutton, with Japan and the Middle East being the main markets.

Live sheep and lamb exports for slaughter during 1987-88 totalled 6.7 million head, a decline of 15 per cent on the previous year due mainly to the closure of markets such as Algeria and Libya.

Beef and veal

The cattle industry is very dependent on international trade in beef and is subject to great fluctuations. Over half of Australia's beef and veal production is exported, with the United States and Japan the main outlets.

Beef and veal production in Australia rose markedly in the 1970s, reaching peak levels of over 2.0 million tonnes in 1977-78 and 1978-79, but declining to 1.3 million tonnes in 1984-85. The increase in production followed the rapid expansion of the beef herd that had occurred during the late 1960s and early 1970s mainly in response to relatively profitable beef prices and increased demand from overseas markets.

In the mid 1970s, poor economic conditions and heavy domestic supplies of beef in major importing countries led them to impose severe restrictions on their imports. With reduced international demand and heavy supplies in Australia, saleyard prices fell greatly and remained low for about four years. The depressed conditions were accompanied by a severe reduction in the national herd.

Improved seasonal conditions during 1983, accompanied by strengthening overseas demand, resulted in a move towards herd rebuilding. However, the high level of drought-induced slaughterings during 1982 had reduced the breeding herd base implying very slow herd expansion until 1986. Higher slaughtering in 1987-88 was due to record beef prices in the US and a larger than expected number of tenders in Japan. Current projections by the Australian Meat and Livestock Corporation (AMLC) indicate that cattle numbers will slowly increase over the next few years. While slaughtering and production will fall slightly in the short term during the rebuilding process, numbers should expand to 25.5 million by 1992 implying a production increase of over 100,000 tonnes on 1987-88.

Of historical significance to the beef industry in 1988 was the opening of the Japanese and Korean beef markets which will provide substantial opportunities to increase beef exports in the coming years.

Pigmeat

Significant changes have taken place in the pig producing industry in recent years. Capital investment and corporate takeovers have seen the emergence of a few large companies producing 30 per cent of all pigs sold in Australia. These moves on top of the trend to more intensive and efficient production techniques have seen pigmeat production rise steadily since 1982 to reach 285,000 tonnes in 1987-88. In addition, there has been an increase in the slaughter weights of pigs reflecting the demands of the fresh pork trade.

It is believed that about 60 per cent of production is processed into bacon, hams and smallgoods, with the rest sold as fresh pork. Less than 2 per cent of the industry's output is exported. The increasing production of pigmeat therefore reflects a steady increase in per capita domestic consumption over the past three years.

In recent years a small but useful market for the meat of feral pigs has been established in Europe.

Prices paid for pigs at auction have varied quite markedly in recent years. Profitability in the industry may be eroded in the coming year due to higher feed grain prices (see Australian Bureau of Agricultural and Resource Economics forecast, *Quarterly Review of the Rural Economy* Volume 10 Number 2).

Poultry meat

The poultry meat industry developed rapidly in the 1970s with both output and consumption rising steeply, although in recent years production has exceeded demand and excess production capacity in the industry continues. Genetic and technical improvements and the organisation of the industry into large-scale enterprises have raised efficiency and helped to reduce production costs relative to other meats. The price competitiveness of chicken meat compared with other meats, especially beef, continues to improve, consolidating the position of poultry meat as the second most important meat after beef in Australia diets.

EXPORTS OR FRESH, CHILLED OR FROZEN MEAT

QUANTITY (a) ('000 tonnes)						
1981-82	536.3	6.3	112.6	29.9	1.5	4.1
1982-83	598.3	7.8	131.8	35.5	1.8	2.2
1983-84	447.3	4.3	58.6	31.7	2.0	1.2
1984-85	406.3	5.2	59.7	27.7	3.2	1.2
1985-86	471.1	5.9	89.8	49.8	2.8	1.7
1986-87	559.9	5.6	107.8	55.2	3.9	2.8
VALUE f.o.b. (\$ million)						
1981-82	1,009.8	14.4	155.3	50.7	3.1	7.3
1982-83	1,164.8	17.9	167.1	61.1	5.4	4.4
1983-84	1,109.6	10.6	84.0	53.4	6.2	2.5
1984-85	1,062.2	16.2	91.7	50.1	11.9	2.5
1985-86	1,301.5	15.7	123.9	87.1	9.9	3.6
1986-87	1,735.1	17.7	165.3	122.1	14.1	5.9

(a) Quantity data on beef, veal, mutton and lamb exports are shown in carcass weight equivalents.

Exports of live animals

For details of the regulation governing the export (and import) of live animals see *Year Book* No. 61.

EXPORTS OF LIVE ANIMALS

Year	Livestock,			Poultry		
	Sheep and lambs	Total (a)		Day old chicks	Total	
		Number	Value f.o.b.		Number	Value f.o.b.
		—'000—	\$'000		—'000—	\$'000
1981-82	6,009	6,112	214,886	809	935	720
1982-83	6,992	7,086	212,277	370	415	565
1983-84	6,349	6,434	228,481	477	568	693
1984-85	6,256	6,316	216,707	234	369	503
1985-86	6,368	6,537	217,716	289	333	700
1986-87	7,658	7,765	213,700	255	397	900

(a) Also includes cattle, calves, buffaloes and pigs.

PRODUCTION AND EXPORT OF BACON, HAM AND CANNED MEAT

Year	Production			Exports			
	Bacon and ham (a)		Canned meat (b)	Bacon and ham (c)		Canned meat (d)	
	Bone-in	Bone-out		Quantity	Value	Quantity	Value
	—'000 tonnes—			'000 tonnes	\$m f.o.b.	'000 tonnes	\$m f.o.b.
1981-82	18.1	57.8	34.6	0.5	1.9	19.7	50.5
1982-83	17.1	55.6	n.a.	0.5	2.3	21.6	58.7
1983-84	18.4	55.5	n.a.	0.5	2.3	18.6	57.7
1984-85	17.7	58.5	n.a.	0.3	1.3	12.9	38.0
1985-86	18.1	55.9	n.a.	0.1	0.8	14.7	41.9
1986-87	13.4	63.1	n.a.	0.6	2.2	13.9	42.2

(a) Production of bacon and ham 'on the bone' is shown in terms of 'bone-in' weight, while production of boneless bacon and ham is shown in terms of 'bone-out' weight. Production of canned bacon and ham, which is reported in terms of 'stated net weight of packs', is included in the 'bone-out' category. (b) Canned weight. Includes bacon, ham and meat and vegetables, but excludes rabbit, poultry and baby foods. (c) Cured carcass weight of smoked or cooked bacon and ham. Includes 'stated net weight of packs' of canned bacon and ham. (d) Canned weight; excludes canned bacon and ham.

GROSS VALUE OF LIVESTOCK SLAUGHTERINGS AND OTHER DISPOSALS (a)
(\$ million)

<i>Year</i>	<i>Cattle and calves</i>	<i>Sheep and lambs</i>	<i>Pigs</i>	<i>Poultry</i>	<i>Total</i>
1981-82	1,890.1	646.7	396.1	362.7	3,295.6
1982-83	2,076.2	548.0	414.9	412.7	3,451.8
1983-84	2,118.0	585.0	375.5	430.2	3,508.6
1984-85	2,253.2	576.1	438.1	512.6	3,783.3
1985-86	2,367.3	531.6	438.3	559.1	3,896.4
1986-87	2,819.7	721.2	468.5	601.7	4,611.0

(a) Includes adjustment for net exports of live animals.

Consumption

The methodology for calculating meat consumption has been revised for the years 1975-76 to 1983-84 and is now shown purely in carcass weight equivalent terms. Canned meat as such is not available. Carcass weight is defined as ex abattoir (i.e. bone-in). Owing to diverse cutting practices by butchers and the difficulty in clearly defining 'retail weight of meat' it is considered impractical to derive a factor for the purpose of expressing estimated meat consumption in terms of retail weight. (Estimates of retail weight as a percentage of carcass weight range from 70 per cent for beef, 80 to 85 per cent for lamb and 80 per cent for pork.)

APPARENT CONSUMPTION OF MEAT AND MEAT PRODUCTS AS HUMAN FOOD

<i>Year</i>	<i>Beef and veal</i>	<i>Mutton</i>	<i>Lamb</i>	<i>Pigmeat (a)</i>	<i>Offal</i>	<i>Total meat</i>	<i>Poultry meat</i>
TOTAL ('000 tonnes)							
1981-82	750	53	245	227	66	1,341	294
1982-83	701	68	247	233	67	1,316	311
1983-84	654	81	261	254	53	1,303	309
1984-85	660	104	267	256	44	1,331	341
1985-86	656	113	268	269	43	1,349	365
1986-87	635	118	241	270	55	1,319	378
PER CAPITA PER YEAR (kg)							
1981-82	49.8	3.5	16.3	15.1	4.4	89.1	19.6
1982-83	45.9	4.5	16.2	15.3	4.4	86.1	20.3
1983-84	42.3	5.2	16.9	16.4	3.4	84.3	20.0
1984-85	42.1	6.6	17.0	16.4	2.8	85.0	21.8
1985-86	41.4	7.1	16.9	17.0	2.7	85.0	23.0
1986-87	39.4	7.4	15.0	16.8	3.4	82.0	23.5

(a) Includes pigmeat products such as bacon and ham.

NOTE: Beef, veal, mutton, lamb, pigmeat and offal are expressed in terms of carcass weight, and poultry meat in dressed weight.

For further details on meat production and slaughtering see the following publications: *Livestock and Livestock Products, Australia* (7221.0), *Value of Agricultural Commodities Produced, Australia* (7503.0) and *Apparent Consumption of Foodstuffs and Nutrients, Australia* (4306.0).

Australia Meat and Livestock Corporation—AMLC

Legislation was enacted to establish the AMLC from 1 December 1977. The Corporation, which regulates and promotes the export of both meat and livestock and the promotion of domestic consumption, replaced the Australian Meat Board.

In mid 1984 the Australian Government introduced measures to restructure the administration of the Australian livestock and meat industry. Legislation enacted at the time, or foreshadowed, had three primary components:

- a restructured AMLC;
- establishment of the Australian Meat & Livestock Industry Policy Council (AMLIPC);
- the foreshadowed replacement of the Australian Meat Research Committee (AMRC) with an incorporated body called the Australian Meat and Livestock Research and Development Corporation (AMLRDC).

The AMLC has the power to trade in meat and livestock in a manner which accords with adopted policy and with normal commercial practice. its power is also extended to engaging in sole trading or to permitting restricted trading by a specified holder or holders of meat or livestock licences. The exercise of this sole or restricted trading power is limited to circumstances where: a monopoly buying power is, in the AMLC's opinion, distorting normal market forces; such action is necessary or desirable to ensure that producers receive a fair return for the meat or livestock exported to that market; the exercise of sole trading powers would be beneficial for the further development of that market; the exercise of sole trading powers would be in the best commercial interests of the industry.

In order to foster consultation, the AMLC may, for the purposes of considering any matter relating to the performance of its functions, make arrangements for consulting persons and bodies representative of different sectors of the industry.

The AMLC's main functions are to:

- improve the production of meat and livestock in Australia;
- encourage and promote the consumption and sale of Australian meat, and the sale of Australian livestock, both in Australia and overseas;
- encourage, assist, promote and control the export of meat and livestock from Australia.

Exporters of meat and livestock are licenced by the AMLC and have to comply with its requirements in relation to export trading. The AMLC assists exporters in overseas market development and conducts meat promotion activities in Australia and abroad. It has authority also, to perform a wide range of other functions aimed at improving the production of meat and livestock for the general benefit of the meat and livestock industry.

Two bodies have been established within AMLC to undertake major programs for the meat and livestock industry. These are the Authority for Uniform Specification of Meat and Livestock (AUSMEAT), which is developing and implementing a meat and livestock description language, and Computer Aided Livestock Marketing (CALM) which is conducting livestock sales by computer.

Australian Meat and Livestock Industry Policy Council—AMLIPC

The legislation referred to above established a new statutory body, the AMLIPC, to relieve the AMLC of responsibility for the examination of all broad industry policy issues. It is intended that AMLIPC:

- facilitate the participation of industry in the development and formulation of industry policies;
- provide a forum of consensus, building between different sectoral interests within the industry;
- provide opportunities, through AMLIPC Working Groups, for all interested parties to work together on the factual examination of industry problems, and to present practical proposals to government for their solution.

Wool

The Australian Sheep Flock contains nearly 12 per cent of the world's sheep and produces over 30 per cent of the total annual production of wool. This is largely due to the more than 80 per cent of Australian sheep which are pure Merino and raised primarily for their heavy fleeces of fine quality wool.

Wool production

Wool as shorn from the sheep ('greasy wool') contains an appreciable amount of grease, dirt, vegetable matter and other extraneous material other than the clean wool fibre. The exact quantities of these impurities in the fleece vary between countries, differing climatic and pastoral conditions, with seasonal fluctuations and with the breed and condition of the sheep. It is, however, the clean wool fibre that is ultimately consumed by the textile industry and the term 'clean yield' is used to express the net wool fibre content present in greasy wool.

Since the 1946-47 season, the average clean yield of Australian wool has been assessed annually. In the early years, the average clean yield was assessed on the basis of a small number of tests and subjective appraisal. However, in recent years the Australian Wool Corporation has calculated the clip average yield on the basis of laboratory tests of yield applied to nearly all wool offered for sale at auction in Australia. It was 64.31 per cent in 1985-86.

Wool scoured and carbonised in Australia before export, however, has a somewhat lower clean yield than the whole clip, because much of the greasy wool treated locally for export in this form is dirty, low-grade wool. The quantity of scoured and carbonised wool exported during 1985-86 was about 16 per cent of total raw wool exports in greasy terms. For the clean yield of Australian scoured wools exported, a standard factor of 93 per cent has been adopted.

The following table shows details of total wool (i.e. shorn, dead, fellmongered and exported on skins) as well as the numbers of animals shorn, the average fleece weight and the gross value of the wool.

SHEARING, WOOL PRODUCTION AND VALUE

Year	Sheep and lambs shorn	Average fleece weight	Wool production			
			Shorn wool	Other wool (a)	Total wool	
					Quantity	Gross value (b)
	million	kg	'000 tonnes	'000 tonnes	'000 tonnes	\$m
1981-82	155.2	4.26	661.0	56.2	717.2	1,789
1982-83	149.1	4.30	641.5	60.2	701.7	1,761
1983-84	152.6	4.40	671.2	56.4	727.6	2,016
1984-85	168.2	4.48	752.7	61.6	814.3	2,434
1985-86	173.8	4.39	762.1	67.9	830.0	2,693
1986-87	179.8	4.53	813.7	73.2	886.9	3,338

(a) Comprises dead and fellmongered wool, and wool exported on skins. (b) Gross value is based, for shorn wool, upon the average price realised for greasy wool sold at auction and, for skin wools, on prices recorded by fellmongers and skin exporters.

The wool market

The primary raw wool market in Australia is at public auctions where brokers, acting on behalf of woolgrowers, receive wool into store, and arrange sampling for measurement of the main, variable physical characteristics. The wool is then offered for sale at a rostered auction. Some 80 per cent or more of the clip is normally marketed this way, the remainder being sold privately at transaction prices agreed between the grower and a buyer.

The Australian Wool Corporation, on behalf of all growers, operates a minimum price support scheme at public auction sales.

Wool receivals

TAXABLE WOOL RECEIVALS

Year	Receivals			Dealers as per cent of total receivals	Shorn wool production (b)
	Brokers (NCWSB)	Dealers (a)	Brokers and dealers		
	—'000 tonnes—			per cent	'000 tonnes
1981-82	539.0	141.4	680.4	20.8	661.0
1982-83	509.6	141.2	650.8	21.7	641.5
1983-84	535.5	152.9	688.4	22.2	671.2
1984-85	588.3	164.0	752.2	21.8	752.7
1985-86	599.2	167.6	766.8	21.9	762.1
1986-87	627.5	187.5	815.0	23.0	696.2

(a) Includes brokers who are not members of the National Council of Wool Selling Brokers of Australia (NCWSB).
(b) Obtained from the annual Agricultural Census.

Under the terms of the Wool Tax Acts, all growers pay a tax on the gross value of shorn wool sales, to provide financial backing for wool promotion, research and the operation of a statutory Reserve Price Scheme. The ABS collects details of the total amounts of taxable wool received by wool selling brokers and dealers each year. These figures exclude wool received by brokers on which tax had already been paid by other dealers (private buyers) or brokers.

Wool marketing arrangements

The Australian Wool Corporation is a Commonwealth statutory authority, established at the request of the nation's woolgrowers to undertake a number of functions on their behalf, principally to stimulate the demand for Australian wool. Most important among these functions are the Reserve Price Scheme in the raw wool market, and comprehensive global wool promotion programs.

The Reserve Price Scheme was introduced to the market in 1970 and seeks to provide a measure of wool price stability, in Australian dollar terms, to the benefit of the industry.

A Minimum Price for each wool type is established at the commencement of each wool selling season (financial year). Any wool which fails to attract bids equal to or higher than this minimum is purchased by the Corporation at that price and held until demand improves. As well, when the market is trading at these minimum price levels, the Corporation may intervene in the market with the aim of providing market stability. This may be needed, for instance, when there is exchange rate uncertainty or when the market enters a cycle of volatile price change.

Finance for the operation of the Reserve Price Scheme is provided by growers, through a compulsory Wool Tax.

The Australian Wool Corporation has a number of other responsibilities which include supervision of the industry's comprehensive research programs, establishing, monitoring and when necessary enforcing industry agreed clip preparation standards, shearer training and encouraging efficiency within the sphere of wool handling and transport. It also operates extensive commercial storage facilities on the industry's behalf.

Wool testing

The Australian Wool Testing Authority came into existence in 1957 but its role became more prominent with the introduction, in 1971, of wool valuation techniques relying on objective specification of wool's main physical characteristics. From the first sales of wool in this manner in the early 1970s, this technique has achieved universal acceptance and now 99 per cent of all wool sold at auction is accompanied by certified measurements for yield, (i.e. the amount and type of clean wool fibre), average fibre diameter and the percentage and type of vegetable fault.

During 1986-87, commercial testing commenced for the additional characteristics of staple length and strength. While the uptake of these additional measurements to date has been modest (17 per cent of 'combing' wool types during 1987-88) these new measurements are seen as necessary to future marketing efficiency for Australian wool.

At the direction of the Commonwealth Government, the Authority, which had operated as a division of the Corporation, was transferred to the private sector effective from the beginning of July 1982. The new company is known as AWTA Ltd.

Wool promotion

Since 99 per cent of the Australian wool clip is exported, the other major arm of wool marketing is the demand stimulating activities carried out in manufacturing and consumer markets around the world. These programs, which commenced in 1937, were significantly scaled up in the 1960s in response to the challenge posed by synthetic fibres. In more recent times these programs have again been increased in an effort to ensure wool's future as a preferred textile fibre in the world's major consumer markets. Growers have financed wool promotion since its inception, and for 1987-88 this was at the rate of 3.5 per cent of gross wool sales revenue, totalling \$188.9 million. This was boosted by a Commonwealth Government contribution of \$31.3 million, which meant a total \$220.2 million was available for wool promotion during the year. The majority of these funds are remitted to the International Wool Secretariat which operates actively in more than 50 countries around the world.

Wool research

Australian woolgrowers have financed industry research programs since 1937. In recent times this was coordinated through the Wool Research Trust Fund to which both the woolgrowers and the Commonwealth Government contributed. The Fund was administered by the Commonwealth Department of Primary Industries and Energy.

From 1 July 1986, the task of determining industry research priorities and allocating funds was transferred to a new body, the Wool Research & Development Council which was constituted as a committee of the Australian Wool Corporation.

Major recipients of wool industry research funds include the Commonwealth Scientific and Industrial Research Organization (CSIRO)—especially in the fields of wool textiles and wool production; Bureau of Agricultural and Resource Economics; universities and States departments of agriculture/primary industry.

Wool income

Fluctuations in wool prices have a marked effect on agricultural and national income. In 1945-46 the gross value of wool production was \$117.2 million, representing 17.4 per cent of the gross value of all agricultural commodities produced, while in 1955-51, when prices reached a peak during the Korean War, wool was valued at \$1,303.8 million, or

55.6 per cent of total agricultural industries. More recent figures for the contribution of wool income to total agricultural production and national exports reflect the growth in other commodities over the intervening years, rather than a decline in the fortunes of the wool industry.

WOOL INCOME (per cent)

<i>Year</i>	<i>Value of wool as a per cent of total agriculture</i>	<i>Value of wool exports as a per cent of total Australian exports</i>
1981-82	14.1	10.2
1982-83	15.0	8.5
1983-84	13.1	8.7
1984-85	15.8	8.7
1985-86	17.5	7.3
1986-87	19.3	10.9

The gradual strengthening of wool prices since the mid 1970s has seen wool's contribution to total national export revenue increase steadily. This trend has accelerated in the years since 1983-84 when export income from wool has climbed from just over \$2 billion to reach \$6 billion during 1987-88. This means that wool is again Australia's largest earner of export revenue, as it has been for most of the 200 years of European settlement in Australia.

Stocks

Stocks shown below of raw and semi-processed wool were held by wool processors, scourers, fellmongers, brokers, dealers and the Australian Wool Corporation. They exclude wool on skins since this wool is not recorded as production until fellmongered in Australia or exported on skins.

WOOL STOCKS ('000 tonnes)

<i>At 30 June</i>	<i>Stocks of—</i>					
	<i>Raw wool</i>		<i>Semi-processed wool</i>		<i>Total wool</i>	
	<i>Greasy</i>	<i>Clean</i>	<i>Greasy</i>	<i>Clean</i>	<i>Greasy</i>	<i>Clean</i>
1982	210.7	131.6	8.5	5.3	219.2	137.0
1983	305.4	189.5	8.2	5.1	313.6	194.6
1984	368.4	232.1	9.6	6.1	378.0	238.2
1985	332.8	212.5	9.1	5.9	341.9	218.3
1986	299.0	190.9	8.5	5.5	307.5	196.3
1987	191.2	122.2	9.9	6.4	201.3	128.6

Wool processing

During the 1970s there was a trend to increased early stage processing of Australian wool before export. The last 2 years has seen a further wave of investment in this area, with some expansion of existing facilities and some new plants being built. There is now sufficient capacity in Australia to process over 20 per cent of the Australian wool clip prior to export.

The main scope for expanded domestic processing remains with worsted types for export in scoured or combed top form. Japanese processors initiated the export of scoured worsted types from Australia, and Japan became Australia's major market for scoured wool in

1973–74. In more recent times China has emerged as a major destination for Australian wool, much of which is part processed prior to export.

Before 1975 the wool processing industry was largely centralised in cities close to major ports. Since then, however, much of the expansion has been in decentralised, inland locations.

Wool consumption

Two series of calculations on Australian wool consumption are shown below:

- Consumption of raw wool, which measures consumption in terms of scoured wool used by mills;
- Consumption of processed wool, which is calculated from the usage of woollen and worsted yarn.

Raw wool comprises greasy, slipe, scoured and carbonised wool. This series has been included for purposes of comparison with other countries.

CONSUMPTION OF RAW AND PROCESSED WOOL
(’000 tonnes)

Year	Consumption of raw wool		Consumption of processed wool					
			Worsted yarn used (a)		Woollen yarn used (b)		Total	
	Greasy	Clean	Greasy	Clean	Greasy	Clean	Greasy	Clean
1981-82	55.5	33.1	8.6	5.1	15.3	9.5	25.1	15.1
1982-83	54.7	32.7	9.8	5.8	13.1	8.2	24.1	14.5
1983-84	54.4	32.4	9.8	5.7	14.4	8.9	25.5	15.2
1984-85	59.3	35.4	10.7	6.3	17.0	10.6	28.9	17.4
1985-86	62.5	37.3	10.5	6.1	18.3	11.4	29.9	18.1
1986-87	62.9	37.6	11.4	6.7	17.1	10.7	29.8	17.9

(a) Wool content of yarns containing a mixture of wool and other fibres. (b) Comprises pure and mixed woollen yarn.

The second series is considered to be a more satisfactory measure of Australian wool consumption, principally because allowance is made for significant quantities of wool tops exported. However, both series relate to consumption of wool by the wool textile industry, and should not be used as measures of consumption of wool at retail level. It has not been possible to estimate wool consumption at retail level because of the impracticability of obtaining reliable data concerning the wool content of the multiplicity of woollen and worsted piece-goods.

Exports of wool

From its earliest days the Australian wool industry has been export oriented, and today approximately 99 per cent of total annual production of wool is exported.

Apart from wool in its natural ‘greasy’ state, and in part processed forms (i.e. scoured, carbonised, top and noil) a significant quantity of wool is also exported on sheep skins.

EXPORTS OF WOOL

Year	Selected exports ('000 tonnes: greasy basis)			Total exports	
	Greasy and stipe	Scoured and carbonised	Exported on skins	Greasy basis (a)	Value f.o.b.
				'000 tonnes	\$m
1981-82	497.6	93.0	50.6	667.9	1,913
1982-83	487.7	82.0	54.2	653.6	1,881
1983-84	497.7	95.7	50.7	669.8	2,049
1984-85	554.9	108.5	55.4	746.8	2,548
1985-86	607.9	130.4	61.2	830.5	3,098
1986-87	677.2	150.6	65.8	923.6	3,888

(a) Includes processed wool.

For further details on sheep shorn, wool production and overseas trade see the following publications: *Livestock and Livestock Products, Australia* (7221.0), *Sheep Numbers, Shearing and Wool Production Forecast, Australia* (7211.0), *Shearing and Wool Production Forecast, Australia, Preliminary* (7210.0), *Livestock Products, Australia* (7215.0), *Foreign Trade, Australia* (5409.0, 5410.0), *Production Bulletin No. 4, Australia* (8360.0) and *Value of Agricultural Commodities Produced, Australia* (7503.0).

Dairying

Dairying in Australia has experienced quite significant changes in recent decades. In response to changed demand patterns and consumer preference, both in Australia and overseas, there have been dramatic changes in cow numbers, farm productivity, product mix, export levels and major export destinations.

Although dairying occurs in all States, Victoria, Tasmania and New South Wales combined account for 80 per cent of total milk production. In recent years there has been structural adjustment in some States to match production with domestic market demand particularly liquid milk demand. With the exception of some inland irrigation areas, e.g. the Goulburn-Murray Valley and the M.I.A., most dairying is centred along the coastal belt. Some feed lot dairies have been established in Australia.

Production

Wholemilk production has been around 6,000 million litres in more recent years with Victoria representing approximately 60 per cent. Although total production has stabilised, this has been associated with a fall in both cow numbers and the number of registered dairy farms. In 1986-87 there were some 17,600 registered dairy farms with 1,697,000 cows in production. This compares with 1982 figures showing some 20,300 farms and 1,812,000 cows.

The factors behind the yield gains of about 4 per cent per annum since 1982 include improved feeding programs (pasture and supplementary), genetic/breeding gains and generally enhanced farm management practices. Economy of operation gains have been possible as average farm and herd size has increased. This has enabled more economic application of new technology.

There has also been change within the processing sector, reflecting adjustments to relative prices. Persistent world stockpiles of butter have depressed export prices over recent years. As a result there has been a marked swing away from butter production to cheese and wholemilk powder production. Associated with falling butter production has been a fall in skim milk powder production. New technology, e.g. short method cheese production and

ultra filtration, is enabling the processing sector to improve its relative competitiveness. Recent amalgamations within the processing sector should enable further competitive gains.

Domestic market

The consumption of dairy products in Australia has undergone change in recent years in both the volume and composition of dairy product consumption. These changes generally reflect changes within the Australian population as Australia becomes more culturally diverse. Other factors influencing dairy food consumption include changed consumer preference, e.g. more diet/health conscious, and changed relative prices (butter with respect to margarine). Liquid milk sales account for around 27 per cent of total milk production and compete heavily against other non-alcoholic beverages, e.g. fruit juices. Changes in manufactured dairy produce consumption have been more dramatic than for liquid milk. Recent product developments such as spreadable butter and butter/vegetable oil blends have been commercialised with reasonable success.

Since 1960 annual per capita cheese consumption has risen by an average of 7.9 per cent with current levels at around 8.4 kilograms. The area of greatest growth has been in the specialty type cheeses while per capita consumption of traditional cheddar type cheeses has stabilised at around 4.5 kilograms per annum. The cheeses to have experienced quite large increases include Camembert, Mozzarella and Parmesan.

Recent figures indicate a slight trend towards locally produced cheese at the expense of imported product—particularly from the EEC. This trend towards local product reflects international currency movements and a more responsive local processing sector. Smaller, sometimes on-farm, cheese plants have been recently established in response to this consumer trend towards the specialty type cheeses.

MILK CATTLE NUMBERS ('000)

*Cows and heifers used or intended for
production of milk or cream for sale*

	<i>Bulls used or intended for service</i>	<i>Cows (in milk and dry)</i>	<i>Heifers</i>		<i>House cows and heifers (a)</i>
			<i>1 year and over</i>	<i>Under 1 year</i>	
<i>31 March</i>					
1982	49	1,810	465	387	73
1983	47	1,792	460	390	69
1984	46	1,809	483	401	66
1985	45	1,809	475	413	63
1986	43	1,770	488	397	61
1987	37	1,716	464	381	41

(a) One year and over, kept for the establishment's own milk supply.

International marketing

During 1987–88, Australia exported dairy product to the value of \$488 million (f.o.b.). In value terms, the main exports were cheese and milk powders, especially skim and whole milk. Given changes in the international marketing environment—especially the EEC—the direction of Australian dairy product exports has changed significantly over recent years.

World market price minima for dairy products are established under the General Agreement on Tariffs and Trade (GATT). The minima are determined after consultation with relevant signatory nations. GATT minimum prices for all major products were increased in March 1988 in response to the tightening international stock situation.

Government assistance

New institutional market arrangements in the Australian dairy industry were introduced on 1 July 1986. This scheme was developed after much industry consultation and replaced an equalisation scheme which aimed to protect the industry from unexpected and sharp falls in market prices. Central to the former scheme was that returns on export markets were pooled and manufacturers received an equalised return.

Under the current scheme there is to be no equalising of returns and, as such, individual manufacturer performance may be reflected in farm gate returns. The general thrust of the new arrangements are to further expose the industry to market forces, both locally and overseas. An integral part of the current arrangements is the operation of the Market Support Payments and the Supplementary Support Payment funds. These funds aim to support export market returns.

The Market Support Payments Fund is financed via an all milk levy which is determined by government following recommendation of the Australian Dairy Corporation. The all milk levy for 1988–89 was set at 45c/kg milkfat; current legislation prevents the levy exceeding 45c/kg milkfat.

The Supplementary Support Payment Scheme was established to cover the transition from the former underwriting/equalisation scheme to the current arrangements. Product levies are payable on all domestic sales of butter and certain cheese varieties. The Treasurer announced in the 1988 May Economic Statement that the phase-out of the Supplementary Support Scheme would be accelerated, with levies reduced heavily in 1988–89. Supplementary Support will cease entirely from 1 July 1989. Assistance to industry is also offered via the Rural Adjustment Scheme which provides financial assistance for such things as farm build-up, farm-improvement and household support. Government funding of dairy research is provided on a dollar for dollar matching basis with industry funded contributions. Producers at present pay a 0.45 cents/kg milkfat levy for research and a 4.95 cents/kg milkfat levy for promotion.

The allocation of research funds is administered through the Dairy Research Council. Dairy Research Council supported research covers three broad areas—farm, manufacturing, and economics and marketing. Examples of more specific research include promotion effectiveness, cheese making technology, pasture renovation, animal nutrition and distribution.

PRODUCTION, UTILISATION AND GROSS VALUE OF WHOLE MILK

Year	<i>Whole milk intake by factories (a)</i>			
	<i>Market milk sales by factories</i>	<i>Milk used in the manufacture of dairy products</i>	<i>Total intake</i>	<i>Gross value</i>
	—million litres—			\$m
1981–82	1,552	3,716	5,268	1,033.9
1982–83	1,573	3,951	5,524	1,186.5
1983–84	1,572	4,351	5,923	1,153.2
1984–85	1,593	4,445	6,038	1,035.4
1985–86	1,625	4,412	6,037	1,106.7
1986–87	1,685	4,491	6,176	1,257.4

(a) These milk intake figures have been collected (from milk factories) by the Australian Dairy Corporation and replace statistics of whole milk production and utilisation previously compiled by the ABS.

Industry outlook

Prices received by Australian manufacturers for both domestic and export products are heavily dependent on policies within the EEC and the United States; with commodity prices relating directly to world stock levels. Production quotas and disposal schemes in the EEC particularly have effectively removed the stockpiles that have overhung the international market in recent times. As a result, world prices have firmed considerably, and this is being reflected in higher payments to producers for manufacturing milk.

At present, trade between Australia and New Zealand is covered by a Memorandum of Understanding. This aims to ensure that there is close liaison between the two countries on matters such as third markets, respective domestic issues regarding production, pricing etc., and access to each country's market. Currently, sales growth of New Zealand is restricted to growth in the total Australian market. Access is currently set at approximately a 5 per cent share of the Australian cheese market. Negotiations on the terms of the Australia-New Zealand Closer Economic Trade Agreement (CER) in 1988 determined that trade in dairy products between the two countries is to be unrestricted by 1990. The reaction of the Australian Dairy industry to this development will be crucial to the Industry's future.

While the international market heavily influences the Australian dairy industry, so too does the domestic market. It is possible that the national liquid milk market may be less controlled in the future. This possibility, together with changing consumer preferences provides the Australian dairy industry with significant challenges.

PRODUCTION AND TRADE OF BUTTER AND CHEESE

Year	Butter			Cheese			
	Factory production	Exports (a)		Factory pro- duction (c)	Exports (b)		Imports
		Quantity	Value f.o.b.		Quantity	Value f.o.b.	
		'000 tonnes	'000 tonnes \$m		'000 tonnes	'000 tonnes \$m	'000 tonnes
1981-82	76.4	5.0	14.0	153.3	57.5	122.9	16.1
1982-83	88.3	15.5	41.1	158.2	54.5	134.6	19.7
1983-84	111.3	27.4	50.3	161.1	54.6	141.1	22.3
1984-85	114.0	40.7	69.2	159.6	67.6	163.7	22.3
1985-86	105.0	42.9	71.6	170.1	66.1	165.5	20.3
1986-87	103.9	27.3	52.9	177.5	62.2	164.3	17.7

(a) Excludes ghee and butter concentrates. (b) Includes processed cheese exports. (c) Factory production is shown only for non-processed cheese.

APPARENT CONSUMPTION OF MILK, BUTTER, CHEESE AND MARGARINE

Year	Apparent consumption Total			Apparent consumption Per capita per year				
	Market milk	Butter	Cheese	Market milk	Butter	Cheese	Margarine	
							Table	Other
		'000 tonnes	'000 tonnes		kg	kg	kg	kg
1981-82	1,552	65	105	103.1	4.3	7.0	6.8	2.7
1982-83	1,572	61	113	102.9	4.0	7.4	6.8	2.8
1983-84	1,572	60	118	101.6	3.9	7.7	6.9	2.7
1984-85	1,594	62	126	101.8	3.9	8.1	6.6	2.3
1985-86	1,625	60	125	102.5	3.8	8.0	6.9	2.1
1986-87	1,655	56	130	102.6	3.5	8.1	6.8	2.1

For further details on the dairying industry see the publications, *Livestock and Livestock Products, Australia* (7221.0), and *Production Bulletin No. 3: Food, Drink and Tobacco, Australia* (8359.0).

Beekeeping

The beekeeping industry consists of approximately 300-400 full-time apiarists, who produce approximately 70 per cent of Australian honey, and a large number of part-time apiarists who produce the rest. Some of these apiarists move as far afield as from Victoria to Queensland in an endeavour to obtain a continuous supply of nectar for honey from suitable flora. While honey production remains the predominant sector of the industry, production of breeding stock and provision of pollination services is significant.

Exports of honey are regulated by the Australian Honey Board which also promotes honey consumption.

Statistics in the following table relate to apiarists with forty or more hives.

BEEKEEPING STATISTICS

Year	Number of apiarists	Honey produced					Beeswax produced	
		Number of beehives		Quantity	Average production per produc- tive hive	Gross value	Quantity	Gross value
		Productive	Total					
		'000	'000					
1981-82	2,263	405	552	24.8	61.3	18,211	482	1,978
1982-83	2,182	390	540	22.5	57.7	16,605	424	1,613
1983-84	2,148	393	529	25.0	63.6	19,220	467	1,622
1984-85	2,222	413	553	28.0	67.7	21,257	528	2,077
1985-86	2,250	427	560	26.9	63.0	25,387	490	2,035
1986-87	1,851	472	537	25.3	53.6	33,038	465	1,988

EXPORTS OF HONEY AND BEESWAX

Year	Honey		Beeswax	
	Quantity	Value f.o.b.	Quantity	Value f.o.b.
	'000 tonnes	\$'000	tonnes	\$'000
1981-82	12.8	10,596	303	1,216
1982-83	14.8	13,075	368	1,387
1983-84	11.0	11,152	256	963
1984-85	17.5	16,480	390	1,589
1985-86	14.6	16,724	292	1,352
1986-87	11.9	16,615	235	1,134

Honey levy

The *Honey Levy Acts (Nos 1 & 2) 1962* impose a levy on domestic sales of honey. The rate of levy is set by regulation up to a maximum of 2.70c per kg fixed by the legislation.

The *Honey Export Charge Act 1973*, imposes a charge on exports of honey. The legislation provides for a maximum charge of 1.5c per kg.

For further information, see the publication *Livestock and Livestock Products, Australia* (7221.0).

Eggs and Egg Products

Commercial egg production in Australian States (including NT but excluding ACT) in 1985-86 was about 183.1 million dozen. The decrease in recent years is expected to continue as all States endeavour to reach their goal of maintaining quota hen numbers at such levels as will result in production being very close to domestic needs with very little left over for export. Such action has been taken as the net return on exports of shell eggs and egg products has been well below the cost of production in past years.

EGGS AND EGG CONSUMPTION (million dozen)

Year	Recorded commercial production	Exports (a)	Apparent consumption in Australia as human food	
			Total	Per capita (number of eggs)
1984-85	185.8	6.3	178.6	137
1985-86	183.1	7.6	177.4	134
1986-87	184.5	4.7	(b)184.5	(b)138

(a) Includes shell egg and egg products in shell egg equivalent. (b) Data from 1982-83 consists of commercial disposals only.

Exports

The Australian Egg Board, established by Commonwealth legislation in 1947, was responsible for coordinating export marketing arrangements. It was empowered to purchase surplus domestic supplies from State marketing authorities, if they so wished, and to arrange to sell such eggs or products on overseas markets.

EXPORTS OF EGGS AND EGG PRODUCTS

Year	Eggs in shell		Eggs not in shell			
	Quantity '000 doz	Value f.o.b. \$'000	Liquid form		Dry	
			Quantity tonnes	Value f.o.b. \$'000	Quantity tonnes	Value f.o.b. \$'000
1981-82	1,143	1,095	5,013	6,400	62	219
1982-83	2,672	1,763	3,455	4,108	85	682
1983-84	6,734	3,541	6,892	6,112	95	312
1984-85	1,964	1,837	3,696	4,462	203	1,058
1985-86	2,315	2,743	2,315	2,743	129	652
1986-87	916	1,436	1,869	4,008	43	231

Following reviews of the Board's operations, in the light of falling export quantities resulting from industry actions to reduce surplus production, the Commonwealth Government announced in August 1984 its decision to abolish the Australian Egg Board. Legislation was enacted late in 1984 to abolish the Board.

Any export marketing is now undertaken by the individual State Board concerned under the aegis of an Exporters Committee established by the Australian Egg Marketing Council (AEMC). The AEMC is a non-statutory body whose membership is made up of the members of the State Egg Marketing Boards.

Exports are predominantly in egg pulp form—white, yolk and whole egg.

Agricultural Improvements

Irrigation on agricultural establishments

Irrigation is one of the factors by which agriculture is developed. The variability in stream flow and annual rainfall means that successful irrigation of crops and pastures is dependent on storage. Ground water supplies are also used in areas where the quantity is adequate and the quality is suitable. The area of land irrigated (approximately 1.8 million hectares in 1986-87) forms 9.2 per cent of the total area under crops.

Chapter 16, Water Resources, contains additional details of water conservation and irrigation with international, national and interstate aspects.

Irrigation statistics are collected every three years in the Agricultural Census and represent area actually irrigated.

SOURCE AND USAGE OF WATER, AUSTRALIA

Irrigation— area irrigated, by source 1986-87 (b)	Area	Percentage of total area irrigated	Estimated annual water use in 1983-84 (a)			
			Irrigation	Rural (excl. irrigation)	Urban/ industrial	Total
	'000 hectares					
Surface water—						
State irrigation schemes	924.2	51				
Rivers, creeks, lakes	501.8	28				
Farm dams	112.2	6				
Total surface water	1,538.2	85			n.a.	
Town or country reticulated (c)	6.9	1				
Underground (ground water)	266.5	15				
Total, all sources	1,811.7	100	10,226	1,342	3,062	14,629

(a) Source: 1985 Review of Australia's Water Resources and Water Use. Water Use Data set, Department of Resources and Energy; Australian Water Resources Council. The data in the original are shown by Drainage Division and provide a sound basis for the efficient utilisation of existing resources and the planning of future projects. (b) Source is the Agricultural Census and represents area actually irrigated. (c) This source represents irrigation water which has come from either surface or underground sources.

Fertilisers

Most Australian soils are deficient in phosphorus. Because of this and the significant but less widespread deficiency of sulphur in many soils, phosphatic fertilisers, particularly single superphosphate, account for the bulk of fertiliser usage. Nitrogen deficiency is also general in Australian soils and the use of nitrogenous fertilisers is increasing. Potassium deficiency however is confined mainly to soils in the higher rainfall areas which are intensively cropped or used for irrigated pastures.

The pattern of fertiliser usage in Australia has changed dramatically in recent years. Prior to 1973-74 the usual consumption ratio of elemental N:P:K has been 2:6:1, but by 1983 the ratio had changed to almost 3:3:1. This variation has resulted from a combination of reduced consumption of phosphatic fertilisers with an increased consumption of nitrogenous fertilisers.

The domestic industry has sufficient manufacturing capacity to meet normal local demand for phosphatic fertilisers but not nitrogenous fertilisers. Australia is dependent on imports of potassic fertilisers, rock phosphate and sulphur. Imports of compounded high analysis fertilisers and specialised fertilisers were insignificant until 1982-83. Since then, however, imports have been rising strongly, largely as a result of oversupply and lower prices on the world market.

ARTIFICIAL FERTILISERS: AREA AND USAGE

<i>Year</i>	<i>Area fertilised</i>	<i>Super- phosphate used</i>	<i>Nitrogenous fertilisers used</i>	<i>Other fertilisers used</i>
	'000 ha	'000 tonnes	'000 tonnes	'000 tonnes
1981-82	26,777	2,873	395	599
1982-83	n.a.	2,562	429	633
1983-84	n.a.	2,481	414	721
1984-85	26,407	2,374	421	885
1985-86	25,089	2,160	408	869
1986-87	24,473	2,079	401	850

Since the Second World War there has been a great expansion of the area of sown pasture accompanied by an increased use of fertilisers. New pasture varieties (including tropical species) have been developed, and nutrient or trace elements deficiencies in soils identified.

The main artificial fertiliser used in Australia is superphosphate, over half of which is used on pastures, mainly in areas with moderate to good rainfall. Large quantities are also used on cereal crops.

SUPERPHOSPHATE USAGE

Selected crops and pastures

<i>Year</i>	<i>Sown and native pastures</i>	<i>Lucerne</i>	<i>Wheat</i>	<i>Other cereals</i>	<i>Sugar cane</i>	<i>Total</i>
AREA FERTILISED ('000 hectares)						
1981-82	12,240	106	9,361	4,034	301	26,777
1982-83	10,711	n.a.	9,299	n.a.	300	n.a.
1983-84	10,175	n.a.	9,672	n.a.	292	n.a.
1984-85	10,686	133	9,694	4,588	297	26,407
1985-86	10,674	n.a.	8,813	n.a.	288	25,089
1986-87	10,399	n.a.	8,525	n.a.	289	24,064
SUPERPHOSPHATE USED ('000 tonnes)						
1981-82	1,518	21	801	416	31	2,873
1982-83	1,289	n.a.	777	n.a.	27	2,562
1983-84	1,229	n.a.	720	n.a.	23	2,481
1984-85	1,227	24	618	352	18	2,374
1985-86	1,211	n.a.	499	n.a.	16	2,160
1986-87	1,130	n.a.	437	n.a.	16	1,981

PRODUCTION AND IMPORTS OF FERTILISERS

Item		1981-82	1982-83	1983-84	1984-85	1985-86 (a)	1986-87
PRODUCTION							
Superphosphate (b)	'000 tonnes	3,464	2,877	2,668	2,647	n.a.	n.y.a.
Mixed chemical fertilisers (including complete manure)	'000 tonnes	1,092	967	990	1,167	n.a.	n.y.a.
Leaf and foliage type fertilisers (including dry and liquid form)	tonnes	7,765	6,846	n.p.	n.p.	n.a.	n.y.a.
Manure (without added chemical fertilisers)(c)	tonnes	26,677	34,128	39,107	37,545	n.a.	n.y.a.
IMPORTS							
Crude fertilisers (mainly natural phosphate)	'000 tonnes	2,772	2,148	1,689	1,763	1,922	1,452
	Value \$m	128.6	109.1	86.3	89.5	107.6	85.3
Manufactured, mineral or chemical fertilisers—							
Nitrogenous (d)	'000 tonnes	108	101	91	201	200	290
	Value \$m	16.2	15.6	14.8	41.8	29.9	42.4
Potassic (e)	'000 tonnes	255	203	228	239	195	227
	Value \$m	26.7	20.7	23.1	29.3	27.2	26.6
Other (f)	'000 tonnes	92	273	389	437	331	119
	Value \$m	19.1	53.1	87.8	106.7	89.6	28.1

(a) No Manufacturing Census was conducted in respect of 1985-86. (b) Includes double and triple superphosphate and ammonium phosphate in terms of single superphosphate. (c) Blood, bone and/or offal, and other material. (d) Mainly ammonium nitrate, ammonium sulphate, calcium ammonium nitrate, sodium nitrate and urea containing in the dry state more than 45 per cent by weight of nitrogen. (e) Mainly potassium chloride and potassium sulphate. (f) Includes phosphatic fertilisers and compounds of the main elements nitrogen, phosphorus and potassium (NPK complete).

Agricultural machinery on agricultural establishments

Statistics on the type of agricultural machinery on agricultural establishments were published in early issues of the *Year Book*. Additional information was published in the publication *Agricultural Land Use, Improvements and Labour, Australia, 1980-81* (7103.0). Details of the sales of new tractors for agricultural purposes are given in the quarterly publication *Sales and Stocks of New Tractors, Australia* (8507.0).

Employment in Agriculture

Employment on agricultural establishments

Prior to 1976, data on employment collected at the annual Agricultural Census differentiated between permanent full-time employees and temporary employees. Full-time workers excluded casual or seasonal workers and other persons working only part-time. Casual or seasonal workers were shown as temporary employees.

In the past it has been difficult to maintain comparability of employment on agricultural establishments from year to year because of the changing number of lessees and share farmers and because of the tendency of many farmers to include part-time family helpers as full-time workers in their returns. Since World War II there has been a decline in the percentage of people living in rural areas due, in part, to a rising standard of living accompanying the introduction of new techniques and increasing use of capital equipment, fuel, fertilisers, and pesticides. As a result, a smaller agricultural labour force is now producing a larger output of farm products.

**EMPLOYED PERSONS IN AGRICULTURE AND SERVICES TO AGRICULTURE
(’000)**

<i>Month of August</i>	<i>Males</i>	<i>Married females</i>	<i>All females</i>	<i>Persons</i>
1982	281.7	87.1	101.0	382.8
1983	290.2	80.2	94.1	384.2
1984	279.3	80.0	93.8	373.1
1985	287.4	89.5	107.1	394.5
1986	278.4	94.0	112.1	390.6
1987	300.4	98.8	116.7	417.1

Regulation of Australian Agricultural Industries

Year Book No. 61, pages 837–57, contains a summary of the means by which agricultural industries are assisted and regulated. It is not intended as a comprehensive statement of all the consultative and legislative assistance and control measures that exist, but rather as a description of the way in which these processes affect the crops, livestock and livestock products referred to earlier in this chapter.

Agricultural Research by CSIRO

Agricultural research conducted by the Commonwealth Scientific and Industrial Research Organization (CSIRO) is directed primarily to aspects of agricultural production and processing that are of widespread significance and require mid-term to long-term research. It is aimed at establishing principles, practices and technologies that will improve the efficiency and long-term viability of Australian agriculture and its capacity to respond to changing needs. It is vertically integrated, covering all aspects from production through to post-harvest handling, storage and processing, and includes studies designed to integrate new plant varieties, animal breeds and production technologies into sound production systems.

CSIRO's research is appropriate for attacking problems or developing opportunities that transcend State boundaries; are complex and require concentration of disciplinary effort for their solution; and may need sustained long-term effort before they yield practical results. Its agricultural research complements that of State government departments and universities, and the Organization attaches considerable importance to collaborative research with them.

CSIRO's agricultural research covers the following research areas: plant improvement; plant physiology and biochemistry; soils and plant nutrition; crop and pasture pests and diseases; livestock production; livestock health; agricultural systems; wool textiles and marketing; food handling, processing and storage; and agricultural and veterinary chemicals. There is also research directly relevant to the agricultural industries carried out within the research area of environmental protection and rehabilitation.

Most of CSIRO's agricultural research is performed within the Institute of Animal Production and Processing and the Institute of Plant Production and Processing. The Institute of Animal Production and Processing carries out scientific and technological research aimed at improving the efficiency of livestock production and processing and the quality and safety of human foods. The Institute's activities include research on control of indigenous and exotic animal diseases; nutrition, reproduction, genetics and management of livestock; methods of processing, handling and storing meat, dairy foods, and fruit and vegetables; and wool textiles and marketing. This research is performed by the following constituent units of the Institute—the Divisions of Animal Health; Animal Production; Tropical Animal Production; Food Processing; Wool Technology; and the Australian Animal Health Laboratory.

Research in the Institute of Plant Production and processing is directed to improving the profitability and stability of industries based on field crops, pastures, horticulture and forests, and to providing knowledge for the use and management of Australia's soils, plants and insects. Specific objectives are: to increase understanding of basic plant biological processes and their interactions with insects and soils; to increase the variety and quality of plant-based products to meet market needs; to develop more efficient production systems; to develop technologies to provide new opportunities for Australian industries; and to improve the community's understanding of Australia's plants, insects and soils. This research is performed in the following constituent Divisions of the Institute: Entomology; Forestry and Forest Products; Horticulture; Plant Industry; Tropical Crops and Pastures; and Soils.

The Institute of Industrial Technologies is also engaged in research of direct benefit to the agricultural industries through research on the design and synthesis of potential agricultural chemicals performed by the Division of Chemicals and Polymers.

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