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NEW SOUTH WALES
STATE MARKETING BUREAU
DIVISION OF MARKETING
AND AGRICULTURAL ECONOMICS
DEPARTMENT OF AGRICULTURE



MONTHLY
MARKETING
REVIEW



DECEMBER, 1944.

Vol. 12

No. 4

ISSUED BY AUTHORITY OF THE MINISTER FOR AGRICULTURE
PREPARED UNDER THE DIRECTION OF THE
CHIEF OF THE DIVISION OF MARKETING
AND AGRICULTURAL ECONOMICS
SYDNEY

MONTHLY MARKETING REVIEW.

A MISCELLANY OF MATTERS RELATING TO THE MARKETING
OF PRIMARY PRODUCTS, AT HOME AND ABROAD.

ISSUED BY AUTHORITY OF THE MINISTER FOR AGRICULTURE
AND PREPARED UNDER THE DIRECTION OF THE CHIEF OF THE
DIVISION OF MARKETING AND AGRICULTURAL ECONOMICS,
DEPARTMENT OF AGRICULTURE, NEW SOUTH WALES, AUSTRALIA.

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HIGHLIGHTS

Consequent upon the extremely low wheat yield and heavy demand for wheat supplies, the N.S.W. Minister for Agriculture has urged the Commonwealth authorities to transport wheat from Western Australia to New South Wales. While there is no immediate shortage in this State the Minister is planning ahead.

It is reported from London that a new all-British synthetic fibre named Ardil has been discovered. It is claimed that while it has given very satisfactory results it should not be called a "wool substitute" but "complementary to wool".

The British Minister for Agriculture recently announced that the British Government and farmers had evolved agricultural price-fixing machinery to avoid future disputes. The new policy provides for the fixation of prices until the summer of 1948 and it has been agreed that the financial situation of farmers should be reviewed every February. Decisions fixing farmers' remuneration will be reached up to 18 months in advance.

Pursuant to powers conferred upon him by the National Security (Food Control) Regulations the New South Wales Minister for Agriculture has issued an Order bringing all oats in the State under the control of his Department. No oats can now be sold without a permit from the Department.

A serious shortage of many classes of vegetables is threatened as a result of the prolonged drought which is being experienced over most parts of the State. Production of fruit has also been very adversely affected.

GLUTS OF FRUITS AND VEGETABLES.

A Royal Commission appointed by the Governor of Queensland recently published the final report on its investigations into the Fruit and Vegetable Industry in that State. In the course of the report, very interesting comments are made on the various factors and combinations of causes from which "gluts" in markets arise and suggestions are advanced whereby gluts and their effects may be mitigated to some extent.

It is stated that, "approaching this question, it is necessary to know in what sense the word "glut" is used. The ordinary meaning of "glut" is a condition in which the supply in a market exceeds the demand, so that the particular commodity which is in "glut" supply has to be sold at nominal prices or dumped. Using the word in this sense, there have been at times, gluts of certain commodities in the various markets in Queensland, but that does not mean that there have been at all these times, such an over-supply of the commodity that it could not be absorbed by the public at reasonable prices. In other words, a glut in market places does not necessarily imply that consumers are glutted.

Gluts in our markets arise from various causes and combinations of causes. In our view the principal causes of gluts are:-

- (1) Over-production resulting in over-supply at a particular time in a particular market or markets.
- (2) Faulty distribution.
- (3) Inadequacy of and non-enforcement of the law relating to grading, topping and maturity and other standards.

(1) Over-production.

It is obvious that over-production can result not merely in a glutting of the market, but a glutting of the public as well. We have heard of many instances when over-production of a particular commodity has resulted not merely in the dumping of the commodity at the market but in the farmer being forced to plough back into the land, even a mature crop which is not worth sending to market. This results in a total loss to the farmer but, of course, it saves him the cost of harvesting and transporting to market. This is not merely an economic waste to the farmer, but a vast economic waste to the community at large.

One of the things which has impressed us greatly is this question of sporadic over-production; its primary cause is the fact that at normal times it is left to each farmer to determine the quantum and type of commodity which he shall produce.

/The ...

The selection of these matters by the farmer depends upon many circumstances, including the geographical situation and suitability of his land, the seasonal conditions obtaining there, his evaluation of market trends which implies an evaluation by him of the quantities of particular commodities which are likely to come on to the market at the same time as his commodity, and various other factors. The data available to him upon which he evaluates these various factors are in some respects of necessity very meagre. Thus he has no means of knowing the quantity of a particular commodity grown in other districts which is likely to come into the market at the time when his commodity shall be marketable. He is inclined to be influenced by superficial factors, for example, if it has occurred that in a particular year he has received very low prices for a particular commodity, his inclination will be not to grow that particular commodity in the succeeding year, or to grow a very small quantity of it. This reaction from low prices in one year has a tendency to under-production in the succeeding year, and, similarly, a higher price in any particular year, tends to over-production in the succeeding year. Indeed high prices or even profitable prices for a particular commodity will cause primary producers who have never produced such particular commodity before, to swing over to its production. In short, while production remains unplanned, it seems impossible to know what the supply will be in the market at particular times.

This age-old oscillation between over-production and under-production can only be cured by some method of planned production. There are, of course, other factors causing over-production and under-production which planning cannot rectify. We refer to such things as unusual seasonal conditions, pests, diseases, etc. In the present war period the exhortation of the Federal Government to householders to grow as much of their own vegetables as possible, and to farmers to increase the production of vegetables, has resulted occasionally in gluts, and gluts arising from these causes are very likely to occur in the immediate future having in view the possibility or probability of the movement out of Queensland of large numbers of consumers. It will be well understood that the vegetables grown by householders reach maturity at the same time as the peak production of that commodity is reached by commercial growers.

(2) Faulty Distribution.

As we have pointed out previously, the market for Queensland-grown fruit and vegetables is all the eastern States of Australia, and several methods of marketing are employed by growers. The most usual method is by sale through agents in Brisbane and country towns and in Sydney and in Melbourne. The goods are consigned to the agent for sale on commission at rates already mentioned. In Brisbane the agents are congregated in two markets, one owned by the City Council and the other by the Brisbane Fruit and Produce Exchange Limited. Each agent occupies a section or sections of these markets, and since it is practically

/impossible...

impossible to carry on the business of an agent outside of these markets their size necessarily limits the number of agents. This factor also results in an agent being unable to expand the floor space available to him as his business increases, and it appears that some of the agents have not sufficient floor space adequately to cope with the quantity of fruit and vegetables handled by them. Growers consign their commodities to their selected agents and, with very minor exceptions, the agent has no pre-advice as to the quantity and variety of the commodities which will come on to his floor on a particular day. Generally his first knowledge of what he will be required to handle on a particular day is when the train or truck arrives at the market. In respect of Stanthorpe fruit and vegetables which are conveyed to Brisbane in a train controlled by the C.O.D. (Committee of Direction of Fruit Marketing, constituted under the Queensland Primary Products Organisation and Marketing Acts), information is available to the agents concerning the quantity and variety of fruit and vegetables consigned to them the night before the train arrives in Brisbane.

Where growers supply by road, there is a greater opportunity of contact between the agent and the grower, and some growers avail themselves of this opportunity of informing the agent of their probable supply in the immediate future. There seems to be no reason why rail suppliers should not give similar advice to their agent by telegram or letter.

Whether the giving of such pre-advice to agents would assist in such distribution is doubtful, but it would appear that if there were an authority which could divert to another market commodities consigned to a market which would appear to be about to be over-supplied, then such pre-advice would seem to be essential. The C.O.D. has selling floors in certain country towns to which it does in fact divert commodities consigned to it for sale. Pre-advice of consignments given to the C.O.D., then, should result in a better distribution of commodities by it.

The C.O.D. has floors at Cairns, Townsville and Rockhampton only, and the other agents have no floors outside of Brisbane. The C.O.D. is enabled, therefore, to bring about a small amount of diversion when over-supply threatens the Brisbane markets, but the other agents have no ready means of diversion. Each of these agents acts separately and his only means of relieving over-supply in Brisbane is by pushing sales to buyers in country towns. The difficulty which the Brisbane agent has in getting into touch with the sufficient number of potential buyers in the country is so great that his efforts would have a limited effect in relieving over-supply.

As we have said, the C.O.D. does, in fact, divert commodities to its country or Sydney selling floor, but some of this diversion is illegally done. When a grower consigns produce for sale on commission to the C.O.D. at Brisbane, the grower has selected the market and normally the C.O.D. is not entitled to
/sell ...

sell those goods in any other market without the authority of the grower which, however, is frequently obtained. In practice, what the C.O.D. does in some cases, is to purchase from the grower the goods at ruling Brisbane market price and then the C.O.D., being the owner of the goods, sends them to one of its other floors. Such a purchase from the grower is illegal if made without his consent, and thereupon the C.O.D. becomes disentitled to charge commission. Other agents pursue the same practice.

We think that the power to divert commodities from one market to another would be helpful in equalising prices throughout Queensland and will have a tendency to relieve gluts, particularly if some system of giving pre-advice to agents is instituted. We think the law should be amended at least in relation to the C.O.D. to permit it to send goods consigned to it for sale in a particular market to any of its other floors, providing that it returns to the grower the market price in the market to which the goods were consigned by the grower. It will appear later that we think that the C.O.D. should be given certain powers not enjoyed by other agents, upon the terms that it undertakes the duty of providing certain services to the community, the main duty being of opening floors in more country towns and the appointment of agents for the sale of fruit and vegetables by them in other towns.

Another cause of market glut is that retailers in peace time and particularly in war time are loath to handle goods which are in over-supply because the low prices they fetch return to the retailer a very small margin of profit while handling costs remain the same. Particularly is this so under price fixing in those cases where the margin of profit is on a percentage basis. In peace time, hawkers were a considerable factor in relieving market glut and they have practically disappeared in war time. In war time also the retailers' shortage of transport has had a serious effect in not relieving market glut, so that it can frequently happen that there is not available to the public who wants it a commodity which is in market glut. We see no reason why in order to supply a deficiency in distribution in war time, idle army trucks should not be used to transport to points in the suburbs particular commodities in over supply and sales made from such trucks. It must be remembered that, in the present circumstances, the less favoured portion of the community is seldom able to purchase at reasonable prices fruit and vegetables even when they are in over-supply. This inability is largely due to defects in distribution.

(3) Inadequacy of and Non-enforcement of Marketing Standards.

One of the causes of glut is the arrival at the market of unsound, immature, or low-quality fruit and vegetables or of commodities whose bad grading or topping inhibits sales.

One of the matters which has particularly struck us throughout the hearings and in private conversations is that the /arrival ...

arrival at the market of such commodities is regarded as a great "bugbear", not only from the point of view of gluts but generally. It was generally conceded that since the war the standards followed in relation to such matters have appreciably sunk. This drop in standards has been contributed to by several causes, the chief being that there have been ruling high prices and short supplies so that the grower has been induced to send to market commodities which he would not ordinarily send, and packed in a way in which he would not ordinarily pack them. The imposition of ceiling prices has also had an effect in this regard since, in many cases, the poorly packed and second class commodity attracts the same price as the first class commodity. This tendency of growers in war time to market such commodities in such a way has been permitted by the authorities upon the excuse that, in time of short supply, the only commodities which should be rejected are those unfit for human consumption. Our experience was that this policy was not confined to periods of short supply.

Under "The Fruit and Vegetables Act, 1927 to 1935" and Regulations, standards in these matters are prescribed, but in our opinion, even in pre-war days, the standards were quite inadequately enforced.

In our opinion the Act and the Regulations should be reviewed towards tightening up the standards, and the law should be fully enforced. There seems to be no reason why packing, grading, quality and maturity standards should not apply to all types of fruit and vegetables and not only to some as at present. Early this year there was a period when the market was glutted with tomatoes. We saw large numbers of cases of tomatoes which arrived in the market leaking, and at the same time there were in the market large numbers of cases of obviously immature tomatoes. Practically all these tomatoes had come from Stanthorpe and obviously should have been stopped being transported from Stanthorpe. Apart from the glutting effect in the market their transport involved an economic loss in cases, packing, and freight. In a period of fourteen days during this period 6,866 cases of these tomatoes were condemned after their arrival in the market. This number represented 9 per cent. of the total receipts. No doubt, in war time, man-power difficulties present some excuse for the non-enforcement of the law, but there is no excuse in peace time.

(4) Future Gluts and their Avoidance.

We have no doubt that gluts are likely to occur in the future for the reasons we have mentioned above. So far as we can see they could only be avoided, if at all, by a system of fully regimented production and distribution, but even under such a system an abnormally good season would produce a glut since planned production would involve aiming at a production sufficient for the public's requirements upon the basis of a year of worse
/than ...

than average seasonal conditions.

One of the great difficulties in marketing fruit and vegetables arises from the fact of their perishability. Most of them must be sold within a few hours, or at most days, of their reaching marketable condition.

Cold Storage - We think that the supplying of cold storage space at markets would have some effect in mitigating gluts, but heard a lot of conflicting opinion on the value of cold storage space in relation to the highly perishable commodities. So far as we could learn, no proper controlled experiments have been made in relation to cold storage of these commodities, or concerning the places at which cold stores could be best situated. A solution of these questions would depend upon such proper experimentation and we do not think that without that we would be justified in making any recommendation in regard to it. However, it is a matter which warrants full and careful enquiry. On the whole we are inclined to the view that the provision of such storage space would be helpful in mitigating gluts, e.g., it seems to be generally accepted that certain Stanthorpe stone fruits which tend to come in glut supply can be effectively cold stored for three weeks.

Canneries (in which we include jam-making, juicing, and processing factories) are helpful in mitigating gluts, and we were informed that the canning power of the canneries in Brisbane is able to handle all commodities which can be profitably canned. There are occasions when a commodity is in glut supply and the canneries do not absorb the surplus.

There are many commodities which cannot be suitably canned and others which cannot be profitably canned. The private canner naturally will accept only such a quantity of such a type of commodity as he can profitably can, and he cannot be expected to have on hand sufficient equipment and trained staff to handle all commodities which may at any time come in glut supply. The infrequency of the use of that equipment, etc., would mean that his business would be over-capitalised.

We do not think that even a cannery co-operatively owned by the growers would be able to carry such an over-capitalisation for the purpose of absorbing all canable commodities in glut supply.

A cannery to be successful must have a market for its produce and an assured annual supply of profitably canable commodities. No cannery which was designed to take everything offering could hope to be a financial success.

Dehydration as a relief from gluts offers very little hope. Dehydrated products command a very limited market and here again it is a question of having equipment available which would be used only sporadically. Successful commercial dehydration, like canning, requires a constant supply of commodities and a market for the dehydrated product."

SALES OF LIVESTOCK AT HOMEBUSH, SYDNEY.

Sheep plentiful.

Sheep and lambs were in very heavy supply during November when pennings totalled 497,087 head, an average yarding of 55,232 head being auctioned each sale day. Compared with the previous month's aggregate, the total represents an increase of approximately 185,000 head.

Plain sheep numerous.

The number of wethers and ewes available was 238,940 head but good quality lines were relatively light. Owing to the drought conditions in many areas a fairly substantial proportion was of plain to medium grade. Good to prime heavy ewes made a better showing than wethers, prime heavy wethers being scarce. Moderate numbers of fair to good light trade sheep were submitted.

Values of sheep decline.

Rates for good quality sheep early in the month mostly remained unchanged, although some sales of prime wethers were at higher prices. Subsequently, values eased, wethers showing a fall of from 2/- to 4/- and ewes 2/- to 5/- per head, spread over four sale days. Later in the period, and at closing sales, rates improved and the market for good quality sheep was from 1/- to 2/- better but realisations were not up to the level of those ruling at the opening sales. Plain to medium quality sheep generally were dull of sale, and on occasions agents experienced difficulty in clearing consignments of plain descriptions even at very low prices.

Some representative sales are listed below:-

At opening sales.

Good heavy	56 lb. wethers	{ skin 2/- }	made 28/10	each	or 5 ³ / ₄ d	per lb.
" trade	46 lb. ewes	{ " 3/- }	" 21/6	"	" 4 ³ / ₄ d	" "

First week

Good trade	46 lb. wethers	{ skin 1/6 }	made 22/8	each	or 5 ¹ / ₂ d	per lb.
" "	46 lb. "	{ " 1/3 }	" 18/8	"	" 4 ¹ / ₂ d	" "
" "	44 lb. ewes	{ " 3/- }	" 18/4	"	" 4 ¹ / ₂ d	" "
" "	40 lb. "	{ " 6d }	" 13/-	"	" 3 ³ / ₄ d	" "

Second week.

Good trade	40 lb. wethers	{ skin 1/- }	made 14/10	each	or 4 ¹ / ₄ d	per lb.
" "	46 lb. ewes	{ " 1/- }	" 16/4	"	" 4d	" "
" "	40 lb. ewes	{ " 6/- }	" 16/9	"	" 3 ¹ / ₂ d	" "

/Third

Third week

Good heavy	56 lb. wethers	(skin 2/-)	made	21/-	each	or	4d	per	lb.
"	"	"	"	19/11	"	"	3 ¹ / ₂ d	"	"
"	trade	46 lb. ewes	(" 2/-)	"	13/8	"	3d	"	"

Fourth week

Good heavy	56 lb. wethers	(skin 5/-)	made	24/10	each	or	4 ¹ / ₂ d	per	lb.
"	"	50 lb. ewes	(" 3/-)	"	17/4	"	3 ¹ / ₂ d	"	"
"	trade	40 lb. ewes	(" 6/-)	"	18/2	"	3 ³ / ₄ d	"	"
"	"	44 lb. wethers	(" 6/-)	"	23/1	"	4 ³ / ₄ d	"	"

Price of mutton lower.

Although on one occasion wethers realised to 6d and ewe to 4³/₄d per lb. (equal to the best prices obtained in October) the average cost of mutton over the period was lower. During the first half of the month, heavy wethers were worth from 4¹/₂d to 5³/₄d per lb. but subsequently they cost from 3¹/₂d to 4¹/₂d. Over the same period, light wethers realised 4¹/₂d to 5³/₄d and 3¹/₂d to 4³/₄d per lb., respectively. Heavy ewe mutton made to 4¹/₂d per lb. with a moderate proportion of sales at 3⁵/₈d to 4¹/₂d but prices chiefly ranged from 2¹/₂d to 3¹/₂d. Light ewes sold to 4³/₄d per lb. and at times from 3³/₄d to 4¹/₂d but generally prices ranged from 2³/₄d to 3¹/₂d per lb.

Heavy yardings of lambs.

Suckers and lambs were in heavy supply and were forwarded in larger numbers than grown sheep. The total for the period reached 258,147 head with plain to medium grades comprising a fairly large proportion of the supply. Good to prime light descriptions were relatively scarce but moderate offerings of good heavy lambs were included. Some lines, having due regard to the adverse season, were of exceptionally good quality.

Lower prices rule.

Although values at early sales were fully maintained, subsequent auctions were marked by a progressive decline until about mid-November. The fall in prices approximated from 3/- to 5/- per head, plain to medium descriptions being most affected. Over the latter part of the month realisations were higher, the improvement mostly being from 1/6 to 2/6 per head. Plain lambs and suckers generally were slow of sale and on occasions proved difficult to clear.

Variations in the market are indicated in the following sales:-

Opening auctions.

Prime 36 lb. suckers (skin 4/6) made 28/1 each or 8d per lb.
 Good heavy 40 lb. lambs (skin 8/-) made 30/10 each or 6 $\frac{3}{4}$ d per lb.

First week.

Good trade 32 lb. suckers (skin 4/-) made 22/8 each or 7d per lb.
 " heavy 42 lb. lambs (" 1/6) " 24/2 " " 6 $\frac{1}{2}$ d " "

Second week.

Good trade 33 lb. suckers (skin 4/6) made 22/10 each or 6 $\frac{3}{4}$ d per lb.
 " heavy 45 lb. lambs (" 6/-) " 27/10 " " 5 $\frac{3}{4}$ d " "

Third week

Good heavy 44 lb. suckers (skin 5/-) made 30/1 each or 6 $\frac{3}{4}$ d per lb.
 " trade 33 lb. suckers (" 4/-) " 21/7 " " 6 $\frac{1}{2}$ d " "
 " heavy 42 lb. lambs (" 1/-) " 21/1 " " 5 $\frac{3}{4}$ d " "

Fourth week

Good heavy 40 lb. suckers (skin 5/6) made 30/1 each or 7 $\frac{1}{4}$ d per lb.
 " trade 32 lb. " (" 3/6) " 23/- " " 7 $\frac{1}{4}$ d " "
 " heavy 42 lb. lambs (" 6/-) " 28/10 " " 6 $\frac{1}{2}$ d " "

Cheaper lamb.

On the average, both suckers and lambs were cheaper, suckers selling to 8d per lb. and lambs to 7 $\frac{1}{2}$ d per lb., whereas up to 8 $\frac{3}{4}$ d and 8 $\frac{1}{2}$ d per lb., respectively, was paid in October. At times during November, suckers made from 7 $\frac{1}{4}$ d to 7 $\frac{3}{4}$ d but mostly prices ranged from 6d to 7d per lb. Heavy lambs generally were worth from 5 $\frac{1}{2}$ d to 6 $\frac{1}{2}$ d per lb., although on occasions sales were made at from 6 $\frac{1}{4}$ d to 7 $\frac{1}{8}$ d. Good quality light lambs mostly were disposed of at 5 $\frac{1}{2}$ d to 6 $\frac{1}{4}$ d but early in the month this class realised from 6 $\frac{3}{4}$ d to 7 $\frac{1}{2}$ d per lb. Hoggets, which were in fairly short supply, continued to sell well, usually from 4 $\frac{3}{4}$ d to 5 $\frac{3}{4}$ d per lb., according to weight and quality, although occasionally as high as 6 $\frac{1}{2}$ d was realised.

Fewer pigs sold.

Marketing operations at the Homebush Abattoir Pig Sale-yards were upset during November, 1944, following industrial trouble at the Abattoirs. No sale was held on the 14th and only 300 pigs were submitted for sale on the 21st. Large numbers came to hand, however, on the first and final sale days. The aggregate for the month was 5,644 head, of which 2,970 arrived by rail. An additional 2,355 were sold by private treaty.

/Weaker...

Weaker market for light baconers.

Baconers were well represented and the consignments included all grades of weight and quality. Good trade descriptions made a satisfactory showing but the proportion of prime sorts was small.

The market was fairly steady when compared with the closing rates of the previous month, although values showed some decline on the final sale day, particularly for lighter descriptions. On a per head basis prices ranged to £7.2.6 while the equivalent rates per pound ranged to 9½d. At closing, a noticeable proportion of the fair trade descriptions realised only 8½d.

Lower prices for backfatters.

Backfatters were moderately supplied and while fair to good trade lightweights predominated, prime heavy pigs were well represented, particularly at the opening auctions.

The market was not quite so strong as during the previous period and values declined somewhat. Most good quality lines sold to 5½d per lb., although 6d was secured for prime heavy weights at closing. The highest price per head noted was £11.18.1.

Porkers in light supply.

Porkers were relatively lightly supplied, although all grades of weight were submitted. Pigs suitable as stores met a strong demand and lightweights ranged in price to 13d per lb. Other lines sold from 8d per lb.

Increased cattle consignments.

Consignments of cattle during November, 1944, were the heaviest for some time, the aggregate for the nine sale days being 20,257 head, including 2,183 auctioned in the store section. During the second week, 5,622 head were yarded, this number being the largest since April, 1943.

The general quality was again disappointing, while light-weight stock continued to predominate. The general standard, however, was no worse than that of the previous month, while on several occasions, particularly during the second half of the period, some improvement was noticed. Drought conditions continued to prevail and the pastoral position showed further deterioration.

Bullocks cheaper.

Numbers of bullocks forward each sale day varied considerably but supplies chiefly were very limited. Lightweights constituted the bulk of the supply, although all grades were represented. Quality mostly ranged from fair to good trade with odd pens of

/prime ...

prime grade.

The high level of values was not maintained during November, prices declining from the opening sale day until about the third week when they became more stabilised. At opening, practically all weights realised to 55/- per 100 lb. but later 51/- for lightweights was the highest noted. The market showed some improvement at closing when quotations for lightweights ranged from 49/- to 53/- per 100 lb. The highest price realised per head was £26.1.0. This sale, however, was an isolated one, highest rates generally being well below this figure.

Prime steers scarce.

Generally, steers were plentiful but small medium to fair trade beasts greatly predominated, while prime descriptions were relatively scarce. Good trade medium weights, however, made a fair showing.

The market was considerably weaker and during the third week quotations ranged from 45/- to 53/- per 100 lb. for good to prime quality. At closing, however, values ranged to 55/-.

Good quality cows scarce.

Cows were in moderate supply. Fair trade lightweights formed the bulk of supplies and the number of good quality sorts, particularly heavy weights, was usually small. Values were maintained early in the period and prime sorts continued to realise to 50/- per 100 lb. Later, however, the market eased, and during the final week heavy cows were quoted at 38/- to 43/- per 100 lb. and light from 36/- to 41/-.

Small heifers well supplied.

Small, fair trade heifers were generally well supplied but there was a shortage of heavier descriptions and prime sorts. The market was much weaker and although prime lines realised to 56/- per 100 lb. at opening highest rates later were 48/- per 100 lb. The market improved at the close.

Variable vealer consignments.

Truckings of vealers were variable but this class of stock was mostly well in evidence. All grades of quality were noticed and while medium to fair trade descriptions comprised the bulk of the lightweights, good trade sorts were well represented amongst the medium and heavy weight consignments. Values were maintained early in the period when quotations ranged to 66/- per 100 lb. Prices declined rapidly during the following few sale days but the market then became steady with rates for good to prime quality ranging chiefly from 48/- to 58/- per 100 lb.

G.C. & J.W.

FRUIT AND VEGETABLE SALES
AT CITY MUNICIPAL MARKETS, SYDNEY.

The extremely dry weather prevailing throughout the greater part of the State was reflected in early stone fruits reaching the market during the month. A large proportion of supplies lacked development, and the quality was also affected.

Large cherries sell well.

Consignments of cherries increased as the month progressed. The Orange and Young districts were the principal sources of supply. A large percentage of the fruit was very small and this class was somewhat difficult to clear at times. For reasonably large fruit there was a good inquiry and extra choice packs were in keen request. The prices realised showed considerable variation but apart from very small fruit, returns should be remunerative to growers. For a few outstanding lines, 20/- per quarter case and higher was paid.

Apricots realise high prices.

Only light supplies of apricots were available but the size and quality of coastal fruit was extremely wide. Towards the close of November, some small consignments were received from the Murrumbidgee Irrigation Area; this fruit generally opened up well and met ready sale. For choice large apricots from all sources high prices were paid, as much as 30/- per half case and occasionally more being realised, but small sizes had to be disposed of at much lower levels.

Supplies of plums increase.

After mid-November there was a marked increase in supplies of plums from coastal orchards and with the somewhat limited demand there was a sharp fall in values for medium to small sizes which comprised a large proportion of stocks. Any very large sizes, however, continued to realise relatively high prices. Some purchases were made for factory purposes.

Now season's peaches available.

Few peaches were available until after mid-November but supplies showed a marked increase towards the close of the month. There was a very good inquiry for large fruit which realised the maximum of tenpence per pound but small fruit proved slow of sale on a number of days, although offered at well below the ceiling rate.

Apple stocks nearly exhausted.

Consignments of apples from within New South Wales which
/comprised...

comprised Granny Smith, Delicious and Democrat generally were light. Request was keen for Granny Smith and Delicious and the ceiling price of 27/- per bushel was realised for other than very small sizes or off-quality packs. Demand for Democrats was not so brisk, nevertheless it was possible to obtain up to 27/- for some choice fruit.

An occasional case of new season's 'cookers' was received from coastal orchards. Interstate supplies included Jonathan, Rome Beauty, Granny Smith, Democrat and a few other varieties, but the quantities showed a considerable decline towards the close of the month and values generally were firmer. Marketing of Western Australian Granny Smiths was completed but Tasmanian Democrats were still available although owing to breakdown many lines had to be repacked.

Good quality pears sell at ceiling rates.

The only pears on offer were from Victoria and comprised principally Winter Nellis, Josephine and Winter Cole, although some Packham's Triumph were available early in November. The maximum of 28/- per bushel ruled for good quality lines of all varieties but lower rates had to be accepted for very small sizes and packs that were too ripe. Only relatively small supplies were forward prior to the close of the month.

Small oranges in limited request.

During the first two weeks of November, the market for Valencia oranges was over-supplied with small fruit, which was difficult to sell, although offered at low prices. Owing to these plentiful stocks values of some of the larger sizes had to be lowered and it was not until consignments declined and surpluses were largely cleared that the market recovered. Towards the close of the month, choice oranges of counts up to 180 were realising to 21/- but there was a wide range in rates for smaller fruit and in some quarters the very small sizes were not clearing to agents' satisfaction.

Pineapples in short supply.

There was a considerable decline in consignments of pineapples. The largest weekly supply approximated 4,300 cases but during the last two weeks of the month less than 3,000 cases were received. The quantities available were insufficient to meet trade requirements and rationing was necessary. The maximum of 25/- per case ruled.

Bananas plentiful and cheaper.

Owing to much heavier receipts, the market for bananas eased appreciably. Large quantities of fruit sold at low rates, especially small sizes and ripe lines. Early in the month the
/maximum...

maximum of 7d per lb. was obtained for specially selected large bananas but it was difficult to obtain above 6d subsequently, the general range being from 3d, while inferior lines were at as low as 1d per lb.

There was a good demand for papaws and rates advanced, choice packs selling to 40/- and occasionally higher.

Passionfruit were lightly stocked and up to 50/- per half-case was obtained.

Small consignments of apple mangoes were received from Queensland and up to 50/- per bushel was realised for best lines.

Falling-off in supplies of green vegetables.

There was a sharp falling-off in supplies of green vegetables owing to the drought conditions being experienced throughout the State. Towards the close of November the quantities of peas and beans coming forward provided only a small percentage of requirements and a number of buyers were unable to make any purchases at times.

Bean supplies inadequate.

Early in the month, Gosford, Tuggerah and the Port Macquarie districts provided the principal supplies of beans. An active demand ruled and the ceiling rate of 20/- per bushel was realised for choice descriptions. Only small quantities were received from local sources prior to mid-November and although fair quantities were available for a short period subsequently, the supply could not be maintained owing to the adverse conditions prevailing and receipts had fallen off to such an extent prior to the close of the month that buyers were unable to secure sufficient for their needs. The position generally was the reverse of that ruling during November, 1943, when the market was glutted and values dropped to extremely low levels.

Most peas sell at maximum rates.

Consignments of peas were insufficient to meet trade requirements for the first two weeks of November and all good quality offerings realised the maximum of 23/4 per bushel. On Tuesday, 14th November supplies increased, approximately 1,360 bags, including some Victorian lots, being available. Despite the increase in stocks no difficulty was experienced in obtaining the ceiling price for good quality lines. The position with regard to weather-damaged lots was not so satisfactory and the assistance of cannery buyers was sought to clear stocks. Towards the close of the month supplies were showing a marked decline and, with the exception of a few inferior lines, 23/4 per bushel was obtained.

/Tomatoes...

Tomatoes in demand.

Choice tomatoes met a satisfactory request throughout the month, particularly towards the close when stocks were much lighter. Supplies from local glasshouses were drawing to a close but new season's field grown tomatoes made their appearance and the quantities, although not large, were increasing. Demand for field-grown packs was very keen and the daily supplies were cleared promptly. Consignments from the North Coast were moderate and of quality, which was variable, ranged from choice to inferior. Some lines arrived in an immature condition and were withheld from sale. For choice packs the ceiling rate was obtained for the greater percentage but other grades sold from 7/- and lower prices were accepted for some inferior lots.

Cabbages sell at higher levels.

With the limited supplies of peas and beans on offer, demand for cabbages improved and values showed a strong upward movement, choice heads selling to 24/- per dozen during the latter part of the month.

Carrots and parsnips in short supply.

Carrots were in reduced supply and were scarce at times. Consignments from Queensland met a keen inquiry and the ceiling price of 25/- per cwt. was readily obtained. Loose parsnips were difficult to procure but limited quantities of bunched lots were available in the growers' section of the market. Rates were very firm.

Beetroot cheaper.

Beetroot was plentiful, especially bunched lines. Supplies were in excess of requirements at times and values eased.

Both swede turnips and sweet potatoes were practically unprocurable.

R.M.

It is reported from Washington that the U.S.A. Department of Agriculture estimates the production of winter and spring wheat as:- Winter wheat at 764,073,000 bushels (22,051,000 bushels less than at August 11); Durum wheat at 31,933,000 bushels (4,757,000 bushels less than at August 11), and other spring wheat at 282,641,000 bushels (26,650,000 bushels less than at August 11).

ALEXANDRIA RAILWAY GOODS YARD
AND SUSSEX STREET SALES.

Supplies of local potatoes fairly heavy.

Arrivals at Alexandria Goods Yard of local potatoes showed a marked increase when 57,559 bags were received as compared with a total of 11,025 bags last month. These arrived mostly from the following districts:- Murwillumbah, Casino, Kyogle, Grafton, Kempsey, Raleigh, Bonville, Macksville, Taree and Windsor. The tubers consisted mostly of new grade Factors with a few Katahdin, also a fairly large percentage of Factor chats. The tubers opened up in very good condition and it was necessary to regrade only about 400 bags. Demand was very keen for supplies for general trading purposes which were rationed and a fairly large percentage was taken over for essential services.

Queensland consignments increased to 8,988 bags of new grade Factors; these arrived in very mixed condition owing to greening, grub, mechanical injuries and faulty grading; about 2,900 bags had to be regraded. The bulk of the supplies was made available for general trading. Arrivals at Darling Harbour landing also increased when 13 trucks were received from Queensland and 14 trucks from local centres; these consisted mostly of new grade Factors and chats and were also released for general trading.

Tasmanian consignments at Sussex Street continued to decline and totalled 27,439 bags of mostly Brownell and Snowflakes as against 53,956 bags in October, a large percentage being taken over for essential services.

From Western Australia receipts at Sussex Street totalled 9,669 bags of Delawares; of these 6,000 bags were taken over for the Services and the remainder for civilian consumption. From the North Coast 1,555 bags of New Grade Factors were consigned to Sussex Street and these were disposed of at ruling rates.

Very light supplies of swedes available.

Receipts of swedes at Alexandria Goods Yard continue to be lighter; from local centres only 897 bags were on offer. Demand was fairly good and during the period clearances were made at £9.0.0 to £10.0.0 per ton. A small consignment, totalling 172 bags, arrived from Queensland and was sold at £8.0.0 per ton. No fresh supplies were received at Sussex Street from Tasmania during the period.

Local beetroot and Queensland sweet potatoes sell well.

Arrivals of local beetroot were restricted to 58 bags from the Maitland district. These met with good inquiry realising £16.0.0 per ton. Supplies of Queensland sweet potatoes amounted to 327 bags and these brought £16.0.0 per ton.

/Scarcity ...

Scarcity of carrots and parsnips.

During the period there were no fresh supplies of carrots and parsnips.

Pumpkin consignments increase considerably - sell well.

At Alexandria Goods Yard there was a considerable improvement in the quantity of pumpkins from Queensland when consignments totalled 36 trucks; all lines on offer were in request and were disposed of at ceiling levels - £22.10.0 per ton. At Darling Harbour landing arrivals included 7 trucks from Queensland which were disposed of at approximately £22.10.0 per ton.

Queensland onions in demand.

Consignments of brown and white table lots of Queensland onions continued to increase, 13,336 bags being received compared with 8,547 bags last month. Sales were easily effected at firm rates of approximately £21.0.0 per ton. At Darling Harbour landing supplies also showed a considerable improvement when 41½ trucks came to hand from Queensland; these brought approximately £21.0.0 per ton. There was also 1 truck of local brown and white and 1 truck of white table onions; no rates were disclosed for same.

Exceptionally light supplies of oaten chaff - lightest for many years.

Oaten chaff consignments during November were further reduced and reached the lowest level for a number of years, consisting of only 37 trucks; these met with very keen inquiry and practically all lots were rationed out to various buyers. Two trucks sold early in the period at £8.15.0 per ton but otherwise all lines reached ceiling levels, £10.5.0 per ton.

Wheaten chaff in request at ceiling rates.

Arrivals of wheaten chaff continued to be fairly light and only 19 trucks came to hand. No difficulty was experienced in disposing of same owing to the shortage of oaten chaff. All lots on offer brought the maximum rate of £10.5.0 per ton with the exception of one truck of medium which brought £9.15.0 per ton.

Lucerne chaff consignments decline.

Supplies of lucerne chaff were again reduced and only 38½ trucks arrived compared with 51½ trucks in October. These were all in demand and were disposed of at firm rates, sales being recorded as follows:- Inferior grassy £10.10.0, grassy £10.0.0 to £12.0.0, prime and choice at £12.10.0 to £13.10.0.

/Lucerne....

Lucerne hay consignments insufficient for requirements.

Maitland district continued to be the most favoured part of the State for supplies of lucerne hay. Although slightly less than October consignments the total received amounted to 120 trucks, being 20 trucks less than were available in October. Demand was very heavy and the quantity received was not sufficient to meet requirements. Early in the period new soft green lots sold at £7.0.0 to £9.0.0 with a few at £6.10.0; later, owing to very favourable drying conditions and the bulk of the lines being well made new green realised £10.0.0 to £11.0.0 per ton with few higher. There were also a few trucks of dump baled special lots which realised £11.0.0 to £12.10.0 per ton.

From other centres supplies showed an improvement, increasing by 14 trucks, and the total being 55½ trucks, including 28½ trucks of derrick pressed; a few of the latter were received from Queensland. Clearances were effected at the following rates: Inferior and grassy £7.10.0, good sound £10.10.0 to £11.10.0, and prime and choice lines £12.0.0 to £12.10.0. Derrick pressed lots from local centres and Queensland realised:- Inferior lines £9.0.0, good sound £9.10.0 to £9.15.0, few heated lines £9.10.0 to £10.10.0, prime £12.0.0 to £12.10.0, few choice £12.10.0 per ton.

Exceptionally heavy supplies of oaten and wheaten hay.

Supplies of oaten and wheaten hay were the heaviest for a number of years and the bulk arrived mostly from the North West districts owing to the unfavourable crops in other parts of the State. Demand was exceptionally good owing to shortage of oaten and wheaten chaff. Consignments aggregated 106½ trucks and comprised 73½ trucks of wheaten, 7 trucks of oaten rack and 26 trucks of oaten derrick pressed. Early a few lots of good sound sold at £8.15.0 with prime £8.10.0 to £8.15.0 and choice lines £9.0.0; later, owing to shortage of chaff prices were at the maximum rate of £9.0.0 per ton.

Straw consignments decline considerably.

Arrivals of straw showed a marked falling off compared with arrivals in October; only 24 trucks came to hand as against 60 trucks in the previous period. The following were received:- 3 trucks of oaten, 6 trucks of wheaten and 15 trucks of rice. Sales were recorded of prime oaten at £7.10.0 with stained wheaten and prime at £7.10.0 per ton. Some sales of rice straw were made at £5.10.0 with a few higher and a number of trucks were consigned to private buyers.

Exceptionally light supplies of wheat.

Arrivals of wheat at Alexandria Goods Yard were considerably reduced, consisting of only half the quantity received last /month ...

month and amounting to 22 trucks and 69 bags. Sales were made of F.A.Q. lots at 3/8, also a few hard varieties at 4/- per bushel, while a number of trucks were not available for general trading. Four trucks were offered at auction and included pick-up lots which realised 3/5²d per bushel.

Maize continues to be very scarce.

Supplies of maize showed a marked decline when only 2,359 bags came to hand as against 5,802 bags in October. Particulars were as follows:- 493 bags of yellow, 757 bags of white from local centres and 1,109 bags of yellow from Queensland. Owing to limited supplies being available the bulk of the arrivals was taken direct to store and not offered for general trading; consequently no sales were recorded. At Sussex Street arrivals from the North Coast were also considerably lighter, totalling only 571 bags of yellow. No rates were disclosed.

Oats again restricted.

Consignments of oats were limited to 10 trucks, the bulk of these being consigned to private buyers while others were taken direct to store and no prices were disclosed.

C.H.F.

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IMPORTATION OF WHEAT FROM WESTERN AUSTRALIA.

The Commonwealth Minister for Commerce and Agriculture has announced that shipments of wheat from Western Australia would be made early in the New Year to relieve the shortage in the Eastern States.

Federal Cabinet, he said, had authorised expenditure of up to £250,000 to pay for the initial shipments.

Freight would cost the Government from 1/6 to 1/8 a bushel. Shipments would be controlled by the Australian Wheat Board, which would see that adequate supplies were maintained.

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WHOLESALE PRICES OF VARIOUS COMMODITIES
IN SYDNEY (N.S.W.) DURING NOVEMBER, 1944,
AND CORRESPONDING FIGURES AT 31st AUGUST, 1939.

The following table gives particulars of the range of prices in Sydney, as collected and recorded by the Division of Marketing and Agricultural Economics, in respect of various commodities for the period indicated:-

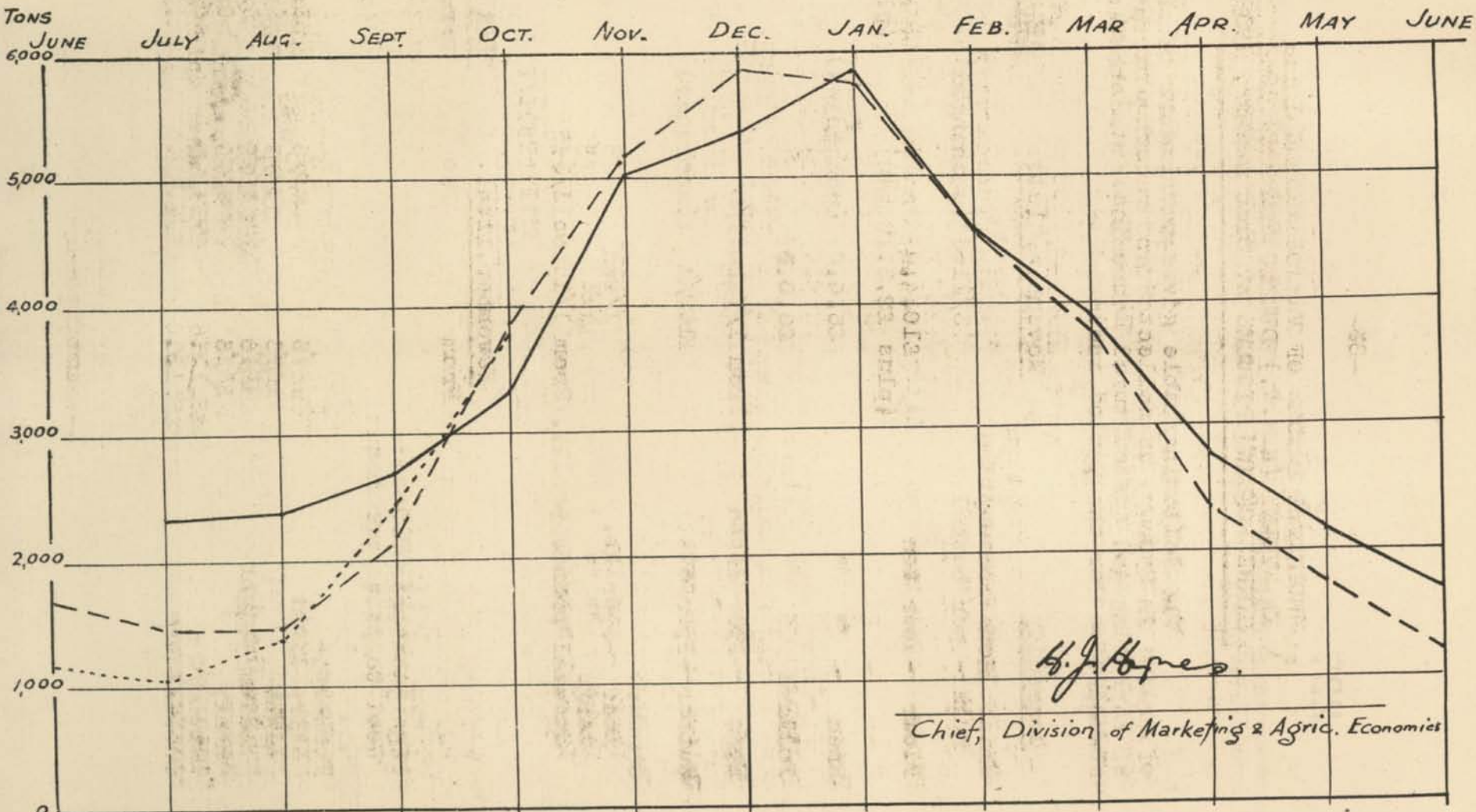
<u>Commodity</u>	<u>November, 1944.</u>	<u>31st August, 1939</u>
Wheat: Home consumption		
Bulk - per bushel	3/11½d (unchanged)	2/4d
Flour - per ton	£10.4.2 " (plus £2.8.10 tax)	£6.12.3 (plus £6.2.9 tax)
Bran - " "	£6.0.0 (unchanged)	£4.5.0
Pollard - " "	£6.0.0 "	£4.5.0
Eggs - per dozen	From 1/7 to 1/8	1/-
Butter - per cwt.	169/4 (unchanged)	161/2d
Cheese:		
Loaf - per lb.	1/0½d "	11d
Large " "	1/- "	10½d
Special brands per lb.	From 1/1d to 1/3½d	1/2d

	<u>November, 1944.</u>		<u>29th August, 1939</u>	
	<u>From</u>	<u>To</u>	<u>From</u>	<u>To</u>
Figs (Abattoir Sales):				
Good to prime per head:				
Porkers -				
Extra light	25/6	49/6	31/6	40/6
Light	40/6	54/6	39/6	44/6
Medium Weight	42/6	69/6	43/6	57/6
Heavy	51/6	73/6	50/6	54/6
Baconers	£3.11.6	£7.2.6	60/6	75/6
Backfatters	£5.15.0	£11.18.6	£4.5.0	£8.10.

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BUTTER PRODUCTION

N.S.W. FACTORY : YEARS 1942/43, 1943/44 AND PART 1944/45



H. J. Hayes

Chief, Division of Marketing & Agric. Economics

Compiled: R. B. McMillan
 Drawn: E. Shannon
 Checked: R. B. McMillan

1942/43 shewn thus: ——— 1943/44 shewn thus: - - - - - 1944/45 (part) shewn thus: ······