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STATE MARKETING BUREAU - DEPARTMENT OF AGRICULTURE. N.S.W.

MONTHLY MARKETING





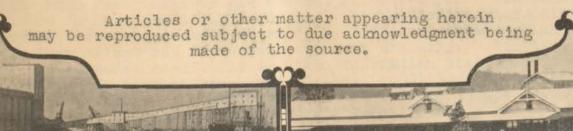




ISSUED BY AUTHORITY OF THE MINISTER FOR AGRICULTURE AND PREPARED UNDER THE DIRECTION OF THE DIRECTOR OF MARKETING, SYDNEY.

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MONTHLY MARKETING REVIEW.

A miscellary of matters relating to the marketing of primary products, at home and abroad.

Released during the second week of cach month.

Issued by authority of the Minister for Agriculturo and prepared under the direction of the Director of Marketing, in the State Marketing Bureau, Department of Agriculture,

New South Wales, Australia.

SUNDRY NOTES.

It has been stated from time to time in responsible quarters that the prices of bran and pollard are apt to accord with the simple formula that when exports of New South Wales flour rise local prices of bran and pollard fall and, conversely, when exports of flour fall away, prices of bran and pollard rise. Of course, there would be exceptions to this, as to every other rule, but the suggestion has been that it would more often hold good than not.

X-X-X-X-X

It is easy to see that a definite relationship between flour exports and bran and pollard prices could exist. Bran and pollard, being by-products of flour manufacture, would necessarily be produced in greater quantities when flour-mills were working at capacity and this would occur when the local demand for flour was supplemented by heavy orders from overseas. In other words, when exports of flour are brisk, the output of bran and pollard is expanded and the suggestion (vide the formula quoted above) has been that, in these circumstances, there would be a natural tendency for local prices of bran and pollard to recede.

x-x-x-x-x-x

How could the formula be upset? In several ways: among them (when flour exports are buoyant and out-turn of bran and pollard is heavy) a drought in, say, the New South Wales dairy-farming districts could give rise to additional demand which could more than offset the increased output at the mill. Similarly, adverse seasonal conditions in other Australian States could necessitate hand-feeding of stock and if these conditions coincided with a period of heavy production of bran and pollard in New South Wales, local prices of those commodities might not recede - they might even advance. Again, a heavy demand for bran and pollard from eversea, due to any cause, could have the effect at a time of abundant production of reducing local supplies and hardening local prices.

Could the formula be upset when flour exports are low and mills are working fewer shifts? In these circumstances, as we have seen, bran and pollard production decreases and, vide formula, prices could be expected to rise. If, at such a time, however, it happened that a demand from say, overseas or from other States fell away, stocks on hand in the mills might be sufficient for a normal local demand and prices could remain stationary. Similarly, if reduced mill activity corresponded with the existence of appreciable stocks on hand and with the cessation of any abnormal local demand, the formula could lack the conditions favourable to its operation.

x-x-x-x-x

Bran and pollard prices are a vital consideration to the poultry-farmer. So are the prices of wheat and certain other food stuffs, but no items in the poultry regimen are of greater importance than bran and pollard. The commercial poultry-farmer, i.e. the farmer who is either wholly or mainly dependent upon poultry for his livelihood, is quite unable, in those districts of New South Wales where commercial poultry-farming mostly occurs, to produce the whoat he feeds to his stock and this is mostly the case in respect of other grains: necessarily it is the case, also, with regard to bran and pollard and it seems to be accepted that it is not a payable proposition for the commercial poultry-farmer to buy wheat for gristing on the farm.

X-X-X-X-X

Most poultry farmers produce much of the green feed needed for their flocks, but that, for the great majority, is the beginning and the end of their self-grown food supplies for fowls. In many other branches of farming, a large measure of farm production for farm stock requirements is practicable: not so, however, in commercial poultry-farming.

X-X-X-X-X

Flock food supplies present the average commercial poultryfarmer with an abiding problem. This is not only true of the industry in New South Wales: the same problem confronts whole-time
poultry-farming all over the world, but, whereas poultry farmers in
some countries have made it the subject of large scale and systematic
attack, the industry in New South Wales has yet to do this. No
doubt, the industry-wide attempt to place bran and pollard supplies
(to mention no others) on a basis of reasonable price levels and
stability will ultimately be made. Meanwhile, study of the problem
proceeds and valuable data which is being systematically recorded in
the State Marketing Bureau establishes the facts as to fluctuations
in exports of flour and the concurrence of these with variations in
the prices of bran and pollard. The value of the formula is being
tested.

x-x-x-x-x-x

Determined that their customers would have no reason to complain of the quality of their oranges, the California Fruit Growers' Exchange outlined their problem to the General Electric Company which has now developed a special X-ray apparatus to show which fruit is good and which is defective. The oranges go through the apparatus on an endless belt past the X-ray tube - defective fruit casts a light shadow on a special screen and is thrown off the belt; good fruit throws a heavy shadow and passes on. (Digest of World Reading).

X-X-X-X-X

Cold storage experiments carried out by Mr. W.J. Williams, B. Sc., at the City of Sydney Municipal Cold Stores are of interest to potato-growers. In the course of an address at the last Annual Conference of the Vegetable Growers' Association of New South Wales, Mr. Williams gave particulars of results of recent experiments in keeping potatoes in cold storage. Results indicated that, when taken out, cold stored potatoes were 15% heavier than those placed in ordinary storage. Apparently, said Mr. Williams, the cold storage process allows of the retention of weight. This method of storing potatoes appears to warrant the attention of growers.

x-x-x-x-x

Delegates to the Vegetable Growers' Conference were interested to obtain an estimate of the cost of cold-storing peas. The advantage of cold storage would be expected to be reaped when supplies were comparatively short. Roplying to a delegate, Mr. Williams quoted 9d per bushel for six weeks' storage of peas.

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AN APPRECIATION.

The Director of Marketing has received a lotter in the following terms from a New Zealand Wholesale Importing House:-

"We thank the State Marketing Bureau and its Officials for the assistance they have been in the matter, which has resulted in a considerable sum going to New South Wales instead of overseas. It has also opened up the possibility of annual business providing the price is competitive."

THE SHEEP AND WOOL INDUSTRY IN AUSTRALIA.

In this, the third of a series of articles relating to the sheep and wool industry in Australia, attention is given to the local manufacturing side, wool publicity campaign and the duties and restrictions operating in various other countries. A schedule is appended indicating avorage prices per lb. realised for greasy wool sold at auction in New South Wales and Australia.

Although by far the greater proportion of our raw wool is exported overseas it must be remembered that considerable quantities are absorbed by local manufacturers. A number of large mills have been established in this and other States, for the manufacture of woollen matorials. Within recent years the manufacturing side has made considerable progress, due to the fact that, with the substantial saving in transport costs, duties, and other expenses, it is possible to manufacture the wool into material locally at prices that are competitive with those of the imported fabrics. So, too, we find all classes of woollen garments being manufactured locally, thus giving employment to many thousands of persons. Here, as in other directions, the Australian has demonstrated his remarkable capacity for undertaking skilled work with a degree of success that ranks him at least equal to the artisans in other countries where similar industries have been established for very many years. As an instance, one cannot do better than quote the notable achievement during October, 1931, of one of the leading business concerns in Sydney, in converting a quantity of wool into a three-picco suit of mon's clothes in the world's record time of one hour fifty-three minutes from the shearing of the sheep to the production of the finished garment, including all the intervening processes. Prior to this the world's record for a similar performance was secured in England, the time occupied being two hours ten minutes.

The latest information (1935/36) shows that 6,494 persons are employed in the woollen trade in New South Wales and 960 persons in wool scouring and fellmongering works.

Recognising the great national importance of the wool industry and the possible serious development of wool substitutes, the Commonwealth Parliament in 1936 passed legislation to provide for a compulsory levy for the establishment of a fund for wool publicity purposes. The following is a summary of the main provisions of the legislative enactments:-

"Wool Publicity and Research Act"
(Act No.24 of 1936)
Assented to 28th May, 1936.

The Act provides for the setting up of an Australian Wool Board consisting of one Government representative and six members nominated by the Australian Woolgrowers' Council.

The functions of the Board shall be to administer the funds obtained under the "Wool Tax Act" (Act No. 23 of 1936) which provides for payment of taxes at the rates of 6d per bale, 3d per butt or 1d per bag, on all wool grown in Australia and shorn on or after the 1st July, 1936. The funds are to be used for the improvement in production of Australian wool, or for the purpose of increasing or extending by publicity or research, or other means the use of wool throughout the world.

The "Wool Tax Assessment Act" (Act No. 22 of 1936) provides for returns to be furnished to the Commissioner of Taxation by wool brokers and dealers and for the collection of the tax by the Commissioner.

If a petition signed by at least 10% of the producers, who own at least 15% of the total shoep is presented to the Minister between 1st January and 30th June, 1940, a poll shall be taken as to whether the Wool Publicity and Research Act shall continue, and if a majority of producers voting who own more than one half of the sheep in Australia favour discontinuance of the Act, it shall cease to have effect from 31st May, 1941.

The following table sets forth the customs duties payable on Australian wool and restrictions operating in respect of its import into the principal importing countries:-

COUNTRY	CUSTOMS DUTY	RESTRICTIVE MEASURES
United Kingdom	Duty Free	Nil
Canada	British Proferential Tariff	Nil
U.S.A.	22 to 35 cents per lb., according to classifi- cation.	Nil
Japan	Duty Free	Limitation of imports to 800,000 bales per annum (1937)
Belgium	Duty Free	Nil
France	40 centimes per 100 kgs. plus import tax of 2%.	N1l
Italy	-	Subjected to regulation by quota & import lic- ensos.
Germany		Subject to licenses & further restricted by necessity for complicated scheme of payment
China India Notherlands	15/3 per 100 lb. Duty Free Duty Free	Nil Nil Nil

Average Price per lb. at Auction of New South Wales and Australian Wool (Greasy).

YEAR	NEW SOUTH WALES	AUSTRALIAN
1900 1901 1902 1903 1904 1905 1906 1907 1908 1909 1910 1911 1912 1913 1913-14 1914-15 1915-16 1916-17 1917-18 1918-19 1919-20 1920-21 1921-22 1922-23 1923-24 1924-25 1925-26 1926-27 1927-28 1928-29 1927-28 1928-29 1929-30 1930-31 1931-32 1932-33 1933-34 1934-35 1935-36	11.625 5.625 6.125 8.00 8.125 8.375 9.00 9.25 9.00 7.875 9.125 8.625 10.50 14.375 14.375 15.00 15.625 12.50 12.25 17.50 23.50 25.50 16.50 16.50 16.50 16.50 16.50 16.50 16.50 16.50 16.50 16.50 16.50 16.50 16.50 16.50 16.75 17.125 19.50 16.50 16.50 16.50 16.50 16.50 16.50 16.75 17.125 19.50 16.50	7.30 8.04 8.75 9.30 9.83 10.14 10.73 9.17 9.35 9.50 9.50 9.70 9.46 9.45 11.86 15.17 16.72 16.49 16.69 14.53 13.16 18,38 24.14 27.10 16.49 16.86 19.50 16.49 16.86 19.50 16.44 10.29 8.36 8.46 8.72 15.84 9.75 14.01

N.S.W figures from N.S.W. Year Book. Commonwealth figures from Commonwealth Production Bulletin No. 29. N.S.W. figures are for year ended 30th June. Commonwealth figures from 1900 to 1913 are for year ended 31st December. The six months ended 30-6-1914 are not covered by Commonwealth prices. Commonwealth figures from 1913-14 onwards are for year ended 30th June. N.S.W. prices are based on prices obtained at auction. Commonwealth prices from 1900 to 1925-26 are based on export values, whilst later figures are based on prices obtained at auction.

SALE OF VEGETABLES IN STANDARD PACKAGES - IS SUCH A SYSTEM DESIRABLE?

The old belief that the vegetable-growing industry in New South Wales was chiefly confined to Chinese market gardeners is gradually becoming obsolete and this industry has developed to such an extent that the value of production now exceeds £1,000,000 annually. As has been the usual experience in industries of this magnitude such development has been attended by difficulties in marketing, particularly as regards costs associated with the distribution between producer and consumer. General acknowledgment has long since been given to the necessity of vegetables as a unit in human diet, containing, as they do, vitamins that are essential to good health. This fact places an obligation on the community through its representatives in authority to ensure that the consumer can obtain supplies of vegetables at a reasonable figure consistent with a fair price to the producer.

The Department of Agriculture in New South Wales now has a scheme under consideration which is designed to reduce distribution costs, eliminate waste and afford greater protection to growers from dishonest or unscrupulous agents.

In brief the proposals are:-

- (1) Legislation to be introduced to provide that where vegetables are sold on a wholesale basis they must be in standard packages, the suggested sizes being 25 lb., 50 lb. and 100 lb.
- (2) The vegetables affected to be:Peas, beans, loose carrots, loose turnips, loose
 parsnips, pumpkins, swedes, sweet potatoes, brussels
 sprouts, potatoes (new and old) and onions.
- (3) The grower's mark or brand to be stamped on the package.
- (4) The agent disposing of the produce may open the package for inspection but must sell it as a whole and not in small parcels.
- (5) The agent must issue a receipt to the buyer with each sale which is impracticable at present.

The compulsory sale of vegetables in standard packages has been operating in Melbourne for some years and has given general satisfaction, while in the Brisbane markets it has also been introduced with slight variations of the Melbourne system and has proved successful.

The benefits that the grower might expect to derive from this scheme might be summarised thus:-

The agent would be required to issue receipts for each sale and the Government Inspector engaged upon the work of inspecting agents' books would be able to confirm that the producer received the full amount realised by the Agent for his produce, less permissible charges.

As the packages would be branded, the grower who put up a good pack would create a goodwill value for his consignments or in other words he would build up a reputation for himself for good quality and the buyer, knowing who the producer was, would in future ask for his brand and would probably be prepared to pay a premium for his supplies. At present the buyer obtains his supplies from the Agent and in most cases does not know who the producer is.

A grower who engaged in the practice of topping would, conversely, be required to take a lower price and would be compelled to "play the game". A healthier tone would thus be created throughout the market.

Waste which occurs in the weighing-up of numerous small parcels would be eliminated and the grower would be paid for the whole of his deliveries. At present it is common to see quantities of waste vegetables lying on the floors of the markets and in a period of 12 months the value of this waste would aggregate a large amount.

Unfair competition as between agents in soliciting business would be obviated and distribution costs would be reduced as the necessity for the engagement of travellers by honest Agents to counteract improper practices by their unscrupulous confreres would be removed.

It has been estimated that the adoption of the proposals would mean an additional £50,000 per annum to the vegetable growers of this State by the elimination of waste, the saving in distributing costs and the return of the actual realisations to growers.

The scheme has the support of the reliable Agents in the markets who are anxious that a better feeling should be promoted between the two major interests in this great industry, namely the grower and the distributor.

Under the existing conditions an Agent might receive 100 bushels of peas or beans for sale and to dispose of this he might have to make 40 sales made up of small parcels which would have to be weighed and in many cases wrapped up and the money collected. In the weighing process certain loss in weight through "spilling", etc. is inevitable and extra labour is required to put the business through and enable stocks to be cleared. Further, it is obviously extremely

difficult for agents to issue receipts for all these transactions and the section of the Farm Products Act relating to dockets could not be properly enforced. If standard packages were adopted, 100 bushels of peas, etc., could be disposed of with a maximum of about 4 sales. It might be said that the quantity of vegetables sold would be restricted under this plan but this has not been the experience in other States, as buyers collaborate in making their purchases.

Alternative suggestions have been put forward regarding the method of sale, one being that the package be sold by the agent without weighing, growers being allowed a margin of 1 lb. in each 25 lb. for shrinkage, etc., with a penalty for growers who do not pack the true weight. Growers would, of course, be expected to so pack that the net weight after shrinkage would be the standard weight. The other suggestion is that the packages - although standard in size - shall be weighed and the grower paid for the full weight. If the former were adopted the position would soon right itself as buyers would soon know from the brands who the growers were who packed short weight and would make provision in their prices in future to cover possible shortages when purchasing these brands, while the penalty provided would also be a deterrent.

As pointed out previously, agents who are desirous of dealing conscientiously with their clients can be seriously handicapped in their competition with less scrupulous sellers. It is contended, however, that improper practices would be rendered much more difficult by the adoption of the proposed new scheme as the enforcement of the docket system would enable the Government Inspector, as previously explained, to exercise a check that each grower received the exact amount realised for his produce less authorised deductions. One important aspect of this particular proposal is that dockets could be issued on Government stationery numbered consecutively to fortify the system.

An improvement in existing conditions is long overdue and the scheme outlined certainly does appear to offer a solution of many of the difficulties now confronting growers and reputable agents alike.

G. J.

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The value of agricultural production in Canada last year was the highest since 1930. The increase in the gross value of production over 1935 was nearly twelve per cent, while the rise in net value was over nine per cent. The advance in the gross value of production since the low point of the recent trade recession was 38.4 per cent. Gains in value of production were reported in 1936 from every province of the Dominion.

MARKETING BOARDS IN QUEENSLAND.

Various marketing (commodity) boards, which were constituted under the provisions of the Primary Producers' Organisation and Marketing Acts, 1926/32, are functioning in Queensland, the following boards being in existence:-

Arrowroot
Atherton Tableland Maize
Barley
Broom Millet
Butter
Canary Seed
Cheese
Cotton

Egg
Honey
Northern Pig
Peanut
Northern Plywood and Veneer Board
Plywood and Veneer Board
State Wheat Board

The Queensland Director of Marketing in his last annual report stated that as a result of the experience that has been gained by the application of the principle of collective marketing to primary products, it can confidently be claimed that the system of collective marketing has proved to be of very material benefit to the primary producers concerned. It has created a stability in marketing operations that otherwise would be lacking. Collective marketing, the Director goes on to say, has made possible the expansion of many of the agricultural industries, and generally orderly marketing has rendered it possible to mould a marketing programme, and in other ways assist the growers in a manner that could not have been achieved by individual effort. There are many instances where the volume of production in pre-pool days has, since the inception of pooling, been increased manifold.

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SMALLER CONSIGNMENTS OF SHEEP AND CATTLE AVAILABLE AT FLEMINGTON - INAUGURATION OF TRI-WEEKLY SALES.

The light supplies of sheep and lambs at the Flemington Saleyards during June were only seasonable, the market invariably being somewhat short at this time of the year. Although actual pennings were 5,000 head more than in June of last year, they were approximately 136,000 less than the number yarded during May.

Shearing operations in many country centres combined with the fact that some graziers are holding sheep and lambs for the wool clip, are largely responsible for the restricted supplies and there does not appear to be any immediate prospect of heavier yardings. The quality of the yardings throughout was mixed, ranging from plain to good with some particularly attractive lines of wethers and ewes also yarded. Suckers were not at any time plentiful and although old lambs were fairly well supplied, the same could not be said of hoggets, which at all times were particularly scarce.

Values for all grades of sheep and lambs generally were better than during the previous month and higher than at the same time last year; on one sale day prices reached high levels, lambs selling to 7\frac{1}{4}d, hoggets 5d, wethers 4\frac{1}{2}d and ewes 4d per 1b. Some of of the best quality sheep and lambs commanded high prices, a line of wethers selling at 39/-, ewes at 29/- and lambs at 34/- per head, which can be regarded as peak prices for some considerable time. Values right throughout, however, were generally not so high, ranging from 26/- to 34/- for best quality wethers, 18/- to 27/- for ewes and 24/- to 30/- per head for lambs, plainer quality sheep and lambs making less money than quoted above.

The market for all grades of sheep and lambs showed a strong upward movement throughout the greater part of the month, but the closing sales were marked by a sharp decline in values, amounting up to 4/- per head for sheep and to 1/6 per head for lambs; hoggets, however, owing to their scarcity, were not affected and sold consistently well during the period.

On an average best wether mutton cost from $3\frac{1}{2}$ d to $3\frac{3}{4}$ d per lb., ewe mutton 3d to $3\frac{1}{2}$ d per lb., hoggets 4d to 5d and suckers and lambs from 6d to 7d per lb., with plain to fair trade quality at lower rates.

In sympathy with the high prices ruling for stock on the hoof, wholesale quotations for mutton and lamb were advanced on several occasions.

In a survey of the yardings over the twelve months ended on the 30th June, 1937, it was found that 348,000 head more sheep and lambs were offered than during last year, the actual pennings at the Flemington Saleyards for the year ended 30th June, 1937, being 3,462,400 head of sheep and lambs, while the average annual pennings over the ten years period ended June, 1936, was 3,576,000 head.

The decision to alter the selling days at the Flemington Saleyards from two to three days per week, i.e. Mondays, Wednesdays and Fridays, was the outcome of a Conference convened by the Metropolitan Meat Industry Commissioner and attended by representatives of pastoral Associations, agents, buyers and railway officials.

The introduction of the chain system of slaughtering as part of the general re-organisation scheme at the Homebush Bay

Abattoirs, will provide that all of the killing will be done by the Commissioner's employees and meat will not be delivered to any retail shops until the day after it is killed; as it was thought that Thursday would not be a suitable day for the sale of lambs, it was decided after careful consideration of all factors affecting the position, to introduce the three days' selling per week. The new scheme operates from Monday, 5th July, 1937. It is considered that better classification of the stock yarded for sale will result in added benefit to stockowners, buyers and agents.

Although lighter supplies of cattle were received during the month of June, over 27,000 were offered for sale or at least 6,000 more than for the corresponding period of last year. Queens-land stations consigned about 1,400 head, while in the store stock section 2,430 were represented. Figures available for the year ended June, 1937, show that over 300,000 cattle were yarded; unquestionably this large total illustrates the importance of Homebush as a solling centre.

A slight improvement in quality was noticeable especially towards the latter end of the period. Plain and inferior descriptions were still in evidence but not to the same extent as of late, the bulk of most yardings being made up of fairly useful trade cattle.

As is usually the case, good to prime cattle were in strong demand and even early in the month when market values were not at their best relatively satisfactory rates were realised. Some rather good quality heavy bullocks were noticed the majority coming from western districts and Queensland stations. That section of the trade needing this particular type of beef, which has been scarce of late, competed freely, values in some instances reaching unexpected levels; the equivalent of 29/- and 30/- per 100 lb. on the hoof being common.

Occasional lots of prime steers were offered, rates being, in almost every case, satisfactory, particularly on the last three sale days. Trade lines were disposed of cheaply in the early part of the month, but as market values improved some very good sales were observed.

On the majority of sale days several really good drafts of cows and heifers were included, the heifers at times being all that could be desired. These cattle and others like them were no doubt "topped off" on other than natural pastures, but it is certain that the owners find this practice well worth while.

Buyers found it very difficult to obtain supplies of vealers suitable for their trade; choice lines were always in demand up to 41/- per 100 lb. of beef being paid, while fair to good quality lots under keen competition realised proportionately high rates. The market generally was a good one from the graziers' viewpoint, values showing an upward trend throughout the month.

STIMULATING THE LOCAL CONSUMPTION OF APPLES.

Generally speaking, apple crops have been very satisfactory this season (1936-37) and it has been estimated that the total yield for the Commonwealth will reach nearly $11\frac{1}{2}$ million bushels. The large harvest, together with the voluntary limitation of exports decided upon by the industry, is expected to result in a very heavy surplus. The quantity normally available for disposal within Australia is 5 million cases but this year it is likely to be in the vicinity of 7,000,000 cases. The question of disposing of this larger surplus has given rise to some anxiety and has resulted in an application being made to the Federal Government by the Apple and Pear Council for a grant for a publicity campaign to stimulate and increase local consumption.

The Council proposed that funds for the campaign should be raised by means of a levy on all fruit consumed in Australia, but this would necessitate legislation for excise or sales tax, both of which are impracticable from an administrative point of view. Further, it is now too late to collect a levy on exports, which have almost been completed for the season. The Acting Prime Minister, in a communication addressed to the Premiers of the various States, pointed out that the provision of funds for use in domestic publicity was not really a function of the Commonwealth but in vidw of the urgency of the matter, the Federal Government was prepared to grant up to £5,000 on a pound for pound basis with State Governments. It is proposed that the contribution of each State should be in proportion to that State's crop less the State's overseas exports.

The estimated production in New South Wales this season is 1,400,000 cases and estimated exports 100,000 cases, leaving a balance of 1,300,000 cases for disposal on the local market. On these figures, the amount to be contributed by the government of this State would be just over £900, based on the proposal submitted by the Commonwealth Government.

The New South Wales Government has signified its agreement to the scheme and it is understood that a number of the other Governments have agreed to co-operate.

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For the purpose of electing producer members to the Egg Marketing Board, the Minister for Agriculture has approved of the area under the Board's control being divided into three zones, each of which will return a member elected under the preferential system of voting. The scheme will be put into operation for the next poll to be taken on 29th October.

THE FISHING INDUSTRY ITS HISTORY AND DEVELOPMENT IN NEW SOUTH WALES.

In the early days of the colony of New South Wales, particularly the first quarter of the nineteenth century, fish played an important part in the supplying of food for residents at Port Mackson. By 1825 commercial advancement had begun and it was discovered that Sydney was most abundantly supplied with fish. Those were the days before middle-men and markets and the fisherman was also a fish-hawker who, as he made his way through Sydney town announced, with loud cries of "Fish-O", the particular attributes of his wares. It was not long, however, before commercial organisations arose to deal with the increase in selling activity consequent upon the ever-growing population. Competition began to operate and it was realised that an important industry had been created. A system of wholesale selling made its appearance at once.

Prior to 1872 the main fish-selling centre was at the foot of Erskine Street but, in the year mentioned, fish markets were erected by the City Council at Woolloomooloo. The building was, at the time, thought to be stupendous and was referred to in the daily paper as quite too extensive for the purposes for which it was des-The trade was then in its infancy, however, and it advanced so rapidly that in 1888 the accommodation was acknowledged to be quite inadequate. A contract was entered into for the erection of new buildings on the Western end of the site. These extensions were later added to and became the main markets when the original The facilities provided at Woolloomooloo building was demolished. for cleaning and scaling of fish showed a marked improvement on the relatively haphazard methods of handling which had existed previous-This market, which was controlled by the City Council, constituted until 1908 the only public fish market in the City of Sydney, although there were several small markets under private During the above year an inquiry was conducted into the suitability of the site of the markets and other relevant matters. In the resultant report it was recommended that a new Fish Markets be established on some site in the centre of Sydney.

The inquiry also included an exhaustive examination of the methods of agents operating in the markets and several important reforms, such as the offering of all fish by auction, were suggested. It is understood that agents took exception to the terms of the report, built a market of their own on land acquired at Redfern, outside the city boundaries, and moved there in a body. The Woolloomooloo markets were, however, carried on by the Council which conducted sales by auction until it was decided a year or two later that these markets were in the wrong location and operations were commenced in a building occupying the present site near Central Station.

/In 1912...

In 1912, a Royal Commission of Inquiry furnished a report on "The Supply and Distribution of Fish". This report considered all aspects of the Fishing industry in New South Wales and contained a severe criticism of the methods of operating which were in existence at the Commonwealth Co-operative Fish Exchange (Redfern Markets). It is recommended that all fish should be handled by the one market only, which should be controlled by the City Council. The Redfern market, however, continued to operate until 1922 when the City Corporation (Fish Markets Act) empowered the City Council to acquire the assets of the rival market. The Commonwealth Co-operative Fish Exchange was bought for £15,000 fourteen years after its inception. The agents who had operated therein transferred their business to the City Municipal Fish Market which has since been the sole fish market in the metropolitan area.

The demand for fish as an item of diet throughout New South Wales is considerable and the problem of catering for the requirements of the populace is no small one. Very large supplies, however, are available to meet this demand, it having been estimated that the waters along the coast contain more than 500 species of fish, of which at least 250 varieties are edible and of high commercial value. Supplies of marine fish, which arrive on the Sydney market, are obtained principally from coastal lakes and estuaries, Fresh-water varieties, such as the sea beaches and ocean waters. Murray Cod and Murray Perch are procurable from inland rivers, particularly the Murray and its tributaries. The operations of fishermen have generally been confined to the coastal lakes and estuaries in which their activities have been well developed. Netting and line fishing are methods most used in these waters. Persons catching fish commercially in tidal waters, also boats used for this purpose, must be licensed under the "Fisheries and Oyster Farms Act, 1935", the fee being 5/- per annum. The method of catching fish in ocean waters, known as "trawling", has advanced considerably since the arrival of the first three English trawlers in 1915. There is, however, still much room for further development, and in view of the wide margin afforded to fishermen it must be stated that the fishing industry is not being exploited to its fullest capacity. Of the quantity marketed annually, approximately 45% is obtained by the deep-sea trawlers, whilst the remaining 55% is supplied by the inshore-fishermen.

The following table (extracted from the Official Year Book, N.S.W. 1934/35) shows the quantity of fish marketed annually since the 1930/31 season and the method by which supplies were obtained:-

Calendar Year	Trawled Fish	Captured Otherwise lb.	Total lb.
1930 1931 1932 1933 1934 1935	18,311,620 13,067,922 11,740,708 11,110,280 10,304,160 10,794,484	9,957,611 10,711,630 11,296,307 11,467,850 11,597,677 12,871,548	28,269,231 23,779,552 23,037,015 22,578,130 21,901,837 23,666,032
	(To be con	ntinued)	E.J.C. & T.McK.

SELLING OUR LIVESTOCK - COULD OVERSEAS METHODS BE EMPLOYED IN AUSTRALIA.

In the selling of any primary produce the main object of the producer is to obtain the highest market values and this can only be achieved by marketing along sound practical lines. vary in different countries in regard to the disposal of sheep and cattle and space does not permit of dealing fully with the various means employed. Co-operative marketing of fatstock is in widespread use throughout the United States of America where it has been found that farmers can market their livestock successfully through their own business organisations. Unlike Australian methods under which all livestock is sold by public auction at so much per head on the hoof, sheep and cattle are invariably sold in the United States either by private treaty or auction at so much per pound liveweight. All animals coming forward for sale are carefully fed and watered on arrival at the selling centre, the owner of the stock paying for all feed consumed by the animals. Before the stock is offered for sale it is graded so that each lot may be penned and sold to the best advantage. The salesman handling the stock, as is the case in Australia, is fully qualified for the position and knows from experience and market conditions when he has reached the highest offer or bid the market justifies. After the stock is sold it is driven to the scales by a yardman and weighed by an employee of the selling company. At all markets, type-registering beam scales are installed, which stamp the weight of the stock directly on the ticket, the salesman afterwards marking the price per 1b. of the stock on the ticket, so that the owner receives the correct amount due to him for the stock. In every instance, both in large and small consignments the greatest care is exercised in order that accurate returns are made to all breeders who market livestock. In the United Kingdom, sales of fatstock on the hoof are made both at auction and by private treaty. In addition, a scheme also operates where cattle, sheep and pigs are sold by carcase grade and weight. Briefly the latter scheme provides for the selling of all animals at so much per pound dressed weight, according to grades and classifications as determined by the Ministry for Agriculture and Fisheries, grades in use being Nos. 1, 2, 3 and rejects. Any owner desiring to market his stock by this method first obtains quotations from the Ministry of the best ruling wholesale meat quotations obtained from carcase butchers; if satisfactory, these quotes are The stock are then forwarded to the accepted by the farmer. Abattoir where they are slaughtered, graded and weighed, the Head Grader issuing both to the producer and buyer certificates showing grades and weights, and the amount realised at the quoted prices, payment in most instances being made by the wholesaler to the producer within 48 hours after the issue of these certificates. relationship of supply and demand is, of course, one of the determining factors in the price paid to the producer for his animals.

It has been found, however, that producers who have used this scheme over considerable periods received far better returns than by selling on the hoof in the open markets.

All livestock marketed in Australia is sold at public auction on the hoof, agents at the various selling centres receiving, drafting and yarding the stock on the producer's behalf; buyers, guided by long experience, appraise values on their own estimates of dressed weights, giving full consideration to the supply and demand, also local and overseas prices for meat and by-products. The human element enters largely into such transactions and it is questionable in many cases whether the true value of a beast is realised according to the actual weight of meat obtained when the animal is finally dressed; again, looking at it from the butchers! viewpoint, whether in buying a beast he obtains the weight of meat he estimates he is paying for. Both in the United Kingdom and the United States of America, where cattle are sold on actual weight the element of risk is greatly reduced and an endeavour made to place the whole transaction on a more equitable basis for all concerned.

In Australia, where conditions differ so widely from those encountered overseas in relation to the marketing of livestock, it is likely that the methods employed have been reasonably efficient in the past, bearing in mind, particularly, the distances of large marketing centres from areas of production.

It is a fact that the various interests connected with the breeding and marketing of livestock are always willing to consider any project which is likely to be of benefit to the industry and place it on a sounder economic basis. The great improvement in recent years of the position of Australian beef, mutton and lamb on overseas markets is evidence of this and it is satisfactory to note that in keeping with the expansion of our overseas trade in these commodities it is the definite aim of producers to breed and market better stock, and sound development along these lines is taking place. It remains to consider whether our methods of marketing cattle cannot be brought to a still higher state of efficiency. With due regard to the record of our present system of selling livestock and its relation to local conditions it is problematical whether, in the light of overseas experience, it should continue indefinitely without amendment.

The Flemington Stock Saleyards in the Metropolitan Area of Sydney, New South Wales, hold a very prominent position in the livestock marketing organisation of Australia. Recently it was decided to hold three selling days per week at Flemington instead of two and the consensus of opinion is that this innovation will increase the general efficiency of the saleyard by promoting better grading of the stock offered.

In commenting upon the relative merits of selling on the hoof and at per pound weight, some interesting facts were quoted in 1932 in a report by a Departmental Stock and Meat Industry Committee on the Meat Industry of the Union of South Africa. The Committee considered that the sale of stock by weight could with advantage be introduced in certain markets in the Union of South Africa, though in respect only of certain classes of animals. It was pointed out that the method might result in lower prices for inferior quality stock, but the opinion was expressed that such prices would show how essential it is for the breeder of inferior stock to improve his breed and market only good quality animals; the view was advanced that sale by weight might actually prove a means whereby an improvement in the quality of livestock could be encouraged.

The grading and appearance of the animals offered in any livestock market is a strong determining factor in the appraisement of values not only overseas but here in Australia. The class and quality of stock yarded at the principal selling centres in this country might easily cause difficulties under a system of selling at per pound weight and until such time as inferior grades of cattle can be eliminated from the fat stock market and sold separately, the method of auctioning which is now in use appears to be the one best calculated to satisfy all sections of the industry,

It should not be overlooked, however, that the practice of selling on a per pound basis is a reasonable one and well worth the consideration of all those engaged in the livestock industry of Australia.

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THE FORECASTING OF CROPS AND ITS IMPORTANCE IN THE NATIONAL ECONOMY.

The demand for up-to-the-minute information regarding crop conditions and probable yields has grown to considerable dimensions in most countries during recent years. Development of agriculture was brought about by various causes such as mechanisation and improved farming practice and production has outstripped domestic needs in many countries, with the result that the situation arises where other markets must be found to absorb surplus products. In such circumstances, it was inevitable that forecasting of crops should become inseparable from the marketing of primary products.

Anticipation of supply is a factor which cannot be neglected by any of the parties interested in the disposal of agricultural products. Effective preparation for and actual marketing of the farmers' produce largely depends on the knowledge of probable yields and stocks. In older countries the value of such reports has long been recognised. In the U.S.A., for example, surveys have been disseminated from as far back as 1871 and the intervening years have seen very great development and improvement. The plan now operating in that country has passed through a full cycle of climatic and other influences that affect products of the land.

So far as New South Wales is concerned the introduction of the Marketing of Primary Products Act in 1927 enabled machinery to be set in motion establishing a system whereby the issue of reliable information concerning crop conditions and probable yields would be made possible. Section 27 (1) of that Act provides that the State Marketing Bureau shall "publish from time to time forecasts of primary production in each of the States of the Commonwealth of Australia, New Zealand and such other countries as the Minister may deem advisable". The reference in the Section to other States of the Commonwealth, to New Zealand and other countries is in view of the fact that agricultural products of New South Wales are apt to be closely affected by those of other States and countries. This Section of the Act contemplates that the State Marketing Bureau shall take steps to obtain copies of similar forecasts prepared by competent authorities in other States and countries for subsequent issue to growers within New South Wales for their information and It has been said that this State is leading the rest of Australia in its endeavour to establish crop forecasting as an essential and statutory service.

The issue of information based on the most complete data it is possible to obtain is the aim. It will be understood, of course, that it is well-nigh imporrible to issue a forecast which will always be borne out by subsequent events, as adverse weather conditions, fires, disease, pest damage, etc., may occur after the making available of any forecast, thus affecting its accuracy. On the other hand, particularly when dealing with crops in need of rain, the receipt of good falls subsequent to the release of a forecast may tend to considerably improve prospects.

Owing to the wide range of primary products in this State, so far it has not been possible to cover all, and the procedure adopted by the Bureau has been one of gradual development. Considerable preliminary work was entailed prior to embarking upon this particular phase of activity. Finally, it was decided that the necessary data to enable the publication of accurate information should be obtained from three main sources, viz. Field Officers of the Department of Agriculture, representative growers and the Bureau of Statistics. Realising that Field Officers almost without exception, have very extensive districts to cover and that their duties entail much travelling, the question of supplementing their reports presented itself owing to the fairly lengthy periods which could occur between visits to various centres.

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Hence the Director of Marketing sought the co-operation of farmers and other persons whose information relative to actual conditions within a reasonable distance of their respective homes would always be up-to-date. The response to the appeal made was beyond expectations and a large corps of voluntary reporters was enlisted. During the growing period of crops questionnaires are forwarded at regular intervals to Field Officers and the honorary correspondents for completion and return to this Bureau by a specified date. On receipt of the completed questionnaires the information contained therein is suitably summarised and a comprehensive survey of conditions existing throughout the various districts is prepared. So far as forecasts of yields are concerned, considerable preliminary data is necessary in respect of the area under crop (or the numbers of bearing trees in the case of fruit production) and in this connection the records of the Bureau of Statistics are largely availed of.

The demand for information relative to the wheat crop of this State is extensive and necessitates the release of an estimate of area sown, five separate monthly reviews of crop conditions and two forecasts of yields, a preliminary in October and a final figure in November. In dealing with this crop the Bureau has copted the services of over 350 honorary correspondents and most of these reporters have furnished information regularly since the inception of the service in 1930. In addition, the Bureau is assisted by the fourteen Field Officers of the Department of Agriculture stationed at various centres throughout the wheat belt.

Reviews of crop conditions and forecasts of probable production of maize, potatoes, apples, pears and citrus fruits are also prepared and made available. An important addition to this section of the Bureau's activities is the issue of regular monthly statements covering such important matters as the state of pastures, water supplies, stock movements, etc. The information which is used as a basis for this survey is furnished by graziers, stock inspectors and others interested in the pastoral industry. This service is welcomed not only by the man on the land but by mercantile, financial and other institutions.

A further service in the forecasting field is the publication at quarterly intervals of information regarding the budding and blooming of forest trees, crops, ground flora, etc. for the benefit of those engaged in the bee-keeping industry. By arrangement with the Forestry Commission of New South Wales the services of their Field Officers are requisitioned for the supply of the necessary date and a number of apiarists also assist. This industry is largely nomadic in character. Apiarists frequently shift their hives from one district to another in order that their bee colonies may obtain the necessary nectar and pollen supplies. It will readily be seen, therefore, that information along the lines indicated fills a definite need.

The continued co-operation of honorary Correspondents is a gratifying feature and it may safely be assumed that the value of crop forecasting is widely recognised by those engaged in pastoral and agricultural pursuits. In these modern times, when efficient marketing of primary products depends so largely upon a knowledge of crop conditions, yields, surpluses, etc., crop forecasting becomes a matter of vital importance.

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SALES OF FARM PRODUCE AT THE ALEXANDRIA RAILWAY GOODS YARD AND IN SUSSEX STREET, SYDNEY.

Consignments of potatoes from Tasmania amounting to nearly 122,000 bags were again heavier during June. Demand was extremely active, the cooler weather being responsible for increased consumption and, despite the much larger supplies, prices showed a general advance. The quality of the offering was more satisfactory as only a small percentage of inferior lines was included. Quotations, as fixed each Monday by agents, ranged as follow:- Brownells £5.10.0 to £6.0.0, Bismarcks £4.10.0 to £5.10.0, Snowflakes £4.0.0 to £5.0.0 and Arranchiefs £4.0.0 to £4.10.0 per ton.

clearances of locally grown potatoes at Alexandria were adversely affected by the increased competition from Tasmanian stocks. Rail offerings totalled 12,493 bags. Demand for seed, which was so active last month, continued during the early part of June. Subsequently, however, buyers appeared to have accumulated sufficient stocks for their immediate requirements and values reverted to normal levels, being below No. 1 Grade realisations in most instances.

Grub infestation and other defects were not so much in evidence, the general quality of the yardings being most satisfactory. Prices obtained at auction ranged from £3.5.0 to £5.11.8 for No. 1 Grade, from £2.15.0 to £4.11.8 for No. 2 Grade and from £3.0.0 to £6.6.8 per ton for Seed.

As a result of the smaller supplies of Victorian onions which amounted to only 8,700 bags, the market continued to advance during June. Inquiry was very keen at from £11.10.0 to £13.10.0 per ton for the brown variety and as high as £18.0.0 was recorded for white. Pickling onions were also available in large quantities and sold well.

Disposals of local pumpkins at Alexandria were more satisfactory. The range of prices was unchanged at from £3.0.0 to £5.0.0 per ton, but agents reported that demand for the 55 trucks available was much more brisk than in the two preceding months when request was extremely dull. The quality of the offering also showed some improvement.

Supplies of Tasmanian swedes received in Sussex Street were more than double those of the previous month. Demand, however, was stimulated by the cool weather prevailing and clearances of the 7,297 bags on offer were quite satisfactory at prices ranging from £3.0.0 to £5.0.0 per ton.

Notwithstanding the larger stocks of both carrots and parsnips values appreciated. This may be attributed to the improved inquiry which was noticeable for all vegetables. From £6.0.0 to £8.0.0 per ton was quoted for carrots and from £5.0.0 to £10.0.0 for parsnips.

During the early part of June a firm demand prevailed in the forage section of the Alexandria Railway Goods Yard and prices of most commodities continued to advance. The advent of rainy weather, however, which was so helpful in improving demand for vegetables adversely affected the inquiry for fodder lines and sales fell off. Oaten chaff, although more lightly supplied, met with a restricted request at £4.15.0 to £6.15.0 per ton. Wheaten chaff was also more lightly stocked but clearances were dull at prices ranging from £4.10.0 to £6.10.0. The 98 trucks of lucerne chaff at rail were of varying quality, no really choice lines being included. Sales were effected at from £5.10.0 to £8.10.0 per ton. At all times during the month a large carry-over was in position on the ground at Alexandria. Agents realised, however, that the dull demand was a result of the improved supplies of natural fodder in near-country districts and, as a roduction in prices would not have stimulated clearances, current levels were maintained.

The position regarding sales of lucerne hay at Alexandria, supplies of which amounted to 159 trucks, was much the same as that for chaff. Early in the period a good demand ruled, as dry conditions still compelled hand-feeding of stock. Rates also advanced, realisations being the highest for several years. As the month advanced, however, the general dull tone became evident and adversely influenced clearances. Stocks considerably exceeded the needs of buyers, and agents found difficulty in disposing of consignments. Rates throughout the month ranged as follow:— Maitland £4.15.0 to £7.5.0, Other Centres £6.0.0 to £10.0.0 per ton. Only 40 bales were received in Sussex Street from the Hunter River district. These moved out rapidly at prices ranging from £4.0.0 to £5.10.0 per ton.

Supplies of local oaten hay at Alexandria were much larger during June and seriously rivalled the stocks from Victoria which were also on the Sydney market. Agents reported that the general quality of the 660 bales of Victorian oaten hay received showed a marked decline. A much easier demand was apparent although the market level was maintained at £9.10.0 per ton. At rail, the general quality of the 62 trucks in position varied considerably but many choice lines were available. From £8.10.0 to £9.10.0 per ton was recorded although some sales to fill standing orders were recorded at higher prices.

Tasmanian straw was more heavily supplied during June, as shipments amounting to 5,950 bales were received. Demand, however, was quite satisfactory and the offering cleared well at from £4.5.0 to £4.15.0 per ton. A total of 800 bales of oaten straw was also received from Victoria. The standard of quality was lower than that of the previous month's deliveries and, as a result, the realisations were lower at £4.10.0 per ton. Consignments of local straw to Alexandria were much larger, amounting in all to 34 trucks, the quality of which varied considerably. A steady inquiry, however, assured good clearances at prices ranging from £3.15.0 to £5.0.0 per ton.

Demand for the 63 trucks of wheat railed to Alexandria during the period under review showed no improvement on that of May. Large quantities of inferior stocks were in evidence for which demand was poor at values ranging from 3/11 to 5/2½d per bushel. Choice lots were in fair request, although, due to the heavier offering, prices declined to a range of 5/4 to 5/9 per bushel.

Heavy rain was the cause of a generally weaker tendency in the maize market during June. The position as regards shortage of natural fodder was somewhat relieved and buyers restricted themselves to purchasing small quantities. Rates for the 7,975 bags on offer in Sussex Street were higher at 6/3 per bushel during the first quarter of the month, but dropped almost immediately to 5/9 per bushel consequent upon the heavy rains rostricting demand. At Alexandria a larger volume of business was transacted, and from 5/9 to 6/3½ per bushel was quoted for the 46 trucks at rail.

Prices for the 20 trucks of oats in position were again firmer. A good inquiry was experienced and stocks cleared well at rates which ranged from 2/11 to 3/6 per bushel according to quality.

MARKETING BUREAU - DEPT OF AGRICULTURE PEAS B9, P21. BEANS GRAPHS SHOWING "SPREAD" BETWEEN RETURN TO THE PRODUCER & PRICE PAID BY CONSUMER YEAR ENDED 315 MAY 1937 PER BUSHEL S. D. 9-11 AV. RETAIL PRICE PER BUSHEL (CONSUMER PAID) 9-2 AV. RETAIL PRICE RETAILERS EXPENSES 5. D (CONSUMER PAID) & PROFITS 3 - 2 RETAILERS EXPS S. D. & PROFITS 2-9 AV. WH. PRICE 6-9 MARKETING COSTS :- 5. (RETAILER PAID) AV. WH. PRICE 6-5 CARTAGE TO RAIL RAIL FREIGHT (RETAILER PAID) MARKETING COSTS:-COMMISSION (7½%) *RETURN TO 5 - 8 CARTAGE TO RAIL * RITURN TO PRODUCER RAIL FREIGHT PRODUCER COMMISSION (71%). 5 - 8= RETURN TO PRODUCER *RETURN TO PRODUCER 5-51 * NOTE - COSTS OF PICKING AND BAGGING AND OTHER COSTS ON THE FARM WOULD BE A CHARGE AGAINST THIS RETURN. Compiled J.H. _ 20-6-37 A.A. Watson. Drawn - E.H.S. _ 29 - 6 -37 Checked - G.C. - 30-6-37 Director of Marketing