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

# MONTHLY MARKETING REVIEW

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

Released during the second week of each month.

Issued by authority of the Minister for Agriculture and prepared under the direction of the Director of Marketing, in the State Marketing Bureau, Department of Agriculture, New South Wales, Australia.

## NOTES ON MARKETING ORGANISATION.

### 1.

In the sphere of agricultural economics, there have been many interesting developments in recent years, but it may be doubted whether any is of greater interest or significance than the advent in at least three Australian States of a particular type of marketing legislation. It appears very probable that the type referred to had its origin in Australia and it may easily be that Australia, which is better known abroad than at home as the place of origin of the "Torrens Title" and as the initial user of a system of voting at Parliamentary elections which guarantees the secrecy of the ballot, will be quoted as the author of a system of marketing control as novel in form and as far-reaching in results as were the outstanding reforms mentioned.

The system of marketing control referred to may be said to have made a first tentative appearance in Australia in the Wheat Pool Act, 1920, of Queensland. It may be that that Act could be regarded as linking up in some degree with the Wheat Acquisition Act, 1914, of New South Wales, but the connection, if any, is slight and the form of control under the New South Wales Act was not producer-control. The Queensland Wheat Pool Act, 1920, provided for the appointment by the Minister of a Board, called the State Wheat Board, of such number of representatives of growers and, if deemed desirable, other persons, as he thought proper, one of whom the Minister should appoint as Chairman. The Board was empowered to "sell or arrange for the sale of wheat, and do all acts, matters and things necessary or expedient in that behalf....." and, subject to certain exemptions, the Act provides that "all wheat shall be delivered to the Board, or their authorised agents, within such times, at such places and in such manner as the Board may fix or as may be prescribed". By the Wheat Pool Amendment Act, 1925, of Queensland, provision was made for the declaration of wheat as a commodity under and for the purposes of the Primary Products Pools Act, 1922 to 1925.

The Primary Products Pools Act, 1922, Queensland, was "an Act to provide for the constitution of Boards representing growers of specified commodities and to confer powers on a Board so constituted with respect to the marketing of the commodity for which it has been constituted; and for other consequential purposes". Constitution of a Board under this Act was required to be preceded by certain action, including declaration of the product as a commodity under the Act and of intention to constitute a Board in relation to the commodity. It was also provided that constitution of the Board was subject to the right of the producers concerned to demand a Poll and to decide thereat whether its establishment should occur. The Board, if and when constituted, was to consist of "such number of elected representatives of the growers of the commodity as prescribed", one of whom was to be appointed Chairman.

This Queensland Act was amended in the light of experience and is now known as the Primary Producers' Organisation and Marketing Acts, 1926 to 1932, but the provisions we are concerned with here remain fundamentally unaltered. In the sense, particularly, that they gave a commodity board the power "to sell or arrange the sale of the commodity", they remain the same today as in the beginning. In effect, they made provision for setting-up a Board with the sole right of selling within the State so much of the commodity it represented as was produced within the State, or of determining who should sell it. In lieu of as many selling controls as there were individual producers, or (it would be more correct to say) as many selling controls as individual producers cared to create, they gave unified control into the hands of a producers' Board, if the producers desired it. Of course, there were constitutional limitations in relation to interstate and overseas trade, but, these notwithstanding, a new and vital method had been devised for the marketing organisation of primary producers. The constitutional limitations will be the subject of later notes and it is sufficient to mention here that a State Marketing Board may participate in both inter-State and overseas trade, though its rights in those respects are not exclusive, as in the case of intra-State trade.

The familiar bug-bear of voluntary marketing co-operation is the great difficulty of making it fully representative of a given industry, or sufficiently so. Another serious difficulty besetting it is that of holding all of the membership to essential requirements. The former difficulty has occasionally been overcome by keen leadership aided by force of circumstances: the latter, by a system of binding members, individually, to the performance of undertakings set forth in contracts they are required to sign. Marketing control of the type indicated in the previous paragraph is designed as a method of securing complete (100%) co-operation by the will of a majority at a Poll: it contrasts sharply, therefore, with the

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method of endeavouring to secure successful, or fully successful co-operation, through the voluntary act of individual producers in joining a co-operative organisation, fortified, it may be, by a contractual relationship between the member and the organisation.

In Queensland, 14 industries are taking advantage of the Primary Producers' Organisation and Marketing Acts under which Marketing Boards are operating in that State in respect of the following commodities:- Arrowroot, Maize (Atherton Tableland), Barley, Broom Millet, Butter, Canary Seed, Cheese, Cotton, Eggs, Honey, Pigs (Northern), Peanuts, Plywood and Veneer, Wheat. There is also in Queensland a Committee of Direction of Fruit Marketing (commonly known as the C.O.D.). This body exists by virtue of the Fruit Marketing Organisation Act, 1923, of Queensland. Practically, it is a Marketing Board and provision exists whereby it may be brought within the scope of the Act governing Marketing Boards.

The following particulars of the Queensland Boards may be useful:-

| Board | Year of original constitution. | Remarks |
|---|---|---|
| Arrowroot | 1922 (no opposition) | Apparently permanent. |
| Atherton Maize | 1923 do. | Renewed in 1932 by $56\frac{2}{3}$ majority. |
| Barley | 1930 (81% majority) | Apparently permanent. |
| Broom Millet | 1926 (no opposition) | Renewed in 1929 and 1931 without opposition. |
| Butter | 1925 (75% majority) | Renewed in 1931 and 1934 without opposition. |
| Canary Seed | 1926 (75% majority) | Renewed in 1930 and 1933 without opposition. |
| Cheese | 1923 (91% majority) | Renewed 1927, 1930, 1933 and 1934 without opposition. |
| Cotton | 1926 (no opposition) | Renewed 1931 without opposition. |
| Eggs | 1923 (87% majority) | Renewed 1925 (73% majority) 1926 ($66\frac{3}{4}$% majority, 1929 (70% majority), 1933 (no opposition). |

/Fruit...

| Board | Year of original constitution. | Remarks. |
|---|---|---|
| Fruit (C.O.D.) | 1923 | Constituted originally for three years. The Act provided for a ballot being taken at the end of the 3-year period provided 500 growers demanded it, but no such petition was received until 1929 when continuance was affirmed for a further period of 5 years by an 87% majority. Apparently no ballot since requested. |
| Honey | 1929 (no opposition) | Renewed in 1929 without any opposition and in 1934 by a 59% majority. |
| Northern Pigs | 1923 (no opposition) | Renewed in 1926 without any opposition, and in 1931 by a 56% majority. |
| Peanuts | 1924 (no opposition) | Renewed in 1925 without opposition, in 1926 by a 90% majority and in 1930 by an 85% majority. |
| Plywood & Veneer | 1934 (no opposition) | |
| Plywood & Veneer (Northern) | 1935 (no opposition) | |
| Wheat | 1921 (97½% majority) | Extended in 1924 by 89% majority, in 1928 without opposition and again in 1934 without opposition. |

From Queensland, the subject type of legislation spread to New South Wales, where the Marketing of Primary Products Act was passed in 1927 as the direct outcome of a decision by the Conference of Producers and Consumers held in Bathurst in September, 1926, that (1) the various Committees (of Conference) indicate generally by their reports that they favour the principle of collective marketing and distribution and (2) in order to make this principle effective it is recognised that producers must have the opportunity of indicating by a ballot that the handling of their particular product should be controlled by a Board on which producers should have direct majority representation.

The Marketing of Primary Products Act, 1927, New South Wales, embodied the fundamental principles of the Queensland legislation as to Marketing Boards with the interesting difference that in New South Wales the initiative is entirely with the producers concerned, who must lodge a petition for a ballot on the question of constituting a Marketing Board, before the particular product is declared a commodity under the Act. Apart from Marketing Boards, the New South Wales Act breaks new ground in that it provides for the establishment of a State Marketing Bureau with specified and highly important functions of record and research in relation to wholesale and retail prices and costs of production of primary products, broadcasting and other methods of dissemination of prices information, forecasting of crops, co-operation with Marketing Boards and Co-operative Societies, organisation, operation and re-organisation of public markets and so on.

The New South Wales Act was amended in 1928, 1930, 1931, 1933 and 1934, but, as in the case of the Queensland legislation, no major departure from the fundamental principles of the original measure has occurred. Following are particulars of the Marketing Boards established in New South Wales:-

| Board | Date of original constitution | Remarks |
|---|---|---|
| Rice | 9.11.1928 | Growers have never sought a poll on question of dissolution. |
| Eggs | 16.11.1928 | Poll on 11.12.1931 showed 78% in favour of continuance. Poll on 25.1.1935 showed 73% for continuance. |
| Honey | 3. 5.1929 | Dissolved following a poll of producers held on 24.8.1932. |
| Wine Grapes | 3. 2.1933 | Growers have never sought a poll on question of dissolution. |
| Bananas | 9. 8.1935 | A poll on question of dissolution of a New South Wales Marketing Board cannot occur until 3 years after date of constitution; thereafter it may occur at 3-yearly intervals. |

In December, 1935, the lead given by Queensland and New South Wales was followed by the State of Victoria. The Marketing of Primary Products Act of that State is substantially a copy of the New South Wales Act of 1927-1934, so far as provision for Marketing Boards is concerned. In the short space of time in which the opportunity has existed, two Marketing Boards have been constituted in Victoria, viz., the Onion and the Egg Marketing Boards, respectively.

The Tasmanian Government presented a Marketing of Primary Products Bill to its Parliament in 1936, but it was rejected in the Upper House. It is understood that the measure will be re-introduced.

Under the Agricultural Marketing Act passed by the Parliament of Great Britain in 1931 and amended in 1933, three types of marketing organisations may be said to have been provided for, viz., (a) trading bodies which undertake all the buying and selling of the products they represent, (b) administrative bodies, which regulate but do not themselves trade, and (c) organisations which include features of both (a) and (b). Each type is brought into being after public inquiry and Parliamentary action, and a poll of the registered producers. A provisional Board appointed by the Minister functions for twelve months and then a representative board is elected by the producers on a regional or some other adequate basis.

According to the latest information available, eight marketing schemes are in operation under the British Act, involving Boards for the following industries:-

| Board | Date of Constitution. | Jurisdiction. |
|---|---|---|
| Hops | 7th July, 1932. | England. |
| Milk | 25th May, 1933. | Scotland, south of the Grampians. |
| Pigs | 5th July, 1933. | Great Britain. |
| Bacon | 5th July, 1933. | Great Britain. |
| Milk | 28th July, 1933. | England. |
| Potatoes | 20th December, 1933. | Great Britain. |
| Milk | 28th March, 1934 | Counties of Aberdeen and Kincardine, Scotland. |
| Milk | 6th July, 1934. | Certain other Counties of Scotland. |

The official publication from which the foregoing particulars of British Marketing Boards are extracted mentions pending schemes in relation to sugar, sugar beet, milk (Moray and Banff), milk (Argyle) and raspberries (Scotland). Further notes with respect to the form and extent of the powers of these Boards and their methods of functioning will appear in a later issue. Notes will also follow with respect to Canadian Marketing Boards and similar developments in New Zealand.

Reverting to the State Marketing Boards in Australia it is significant that each of the respective State enactments under which they function contains provision that "they shall not be deemed to represent the Crown for any purpose whatsoever"; there is provision for Crown representation on these Boards, but it is minority representation and in no wise intended nor permitted to affect the principle just enunciated.

(To be continued).

A.A.W.

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THE POTATO GROWING INDUSTRY IN NEW SOUTH WALES AND THE POSSIBILITY OF INCREASING PRODUCTION.

The potato-growing industry of New South Wales showed an improvement in the season 1935/36, both as to acreage and yields as the following figures demonstrate:-

| Year | Area (acres) | Production (tons) | Average Yield per acre (tons) |
|---|---|---|---|
| 1934/35 | 19,662 | 46,033 | 2.34 |
| 1935/36 | 22,743 | 62,882 | 2.76 |

The question naturally arises whether this improvement will progress until that stage is reached where New South Wales will again be within measurable distance of producing within her own borders the bulk of her potato requirements.

It is a puzzling fact that the potato industry of New South Wales is appreciably a smaller one to-day than it has been in years gone by. As far back as 1911 there were 44,452 acres under crop from which the highest aggregate yield on record was obtained, viz. 121,033 tons, whilst the highest yield per acre (3.1 tons) was recorded in season 1906/7. Reference to the Official Year Book of New South Wales shows that the total area planted to potatoes in this State and the total production therefrom were substantially less in the ten years ended 1936 than in the previous ten years ended 1926, notwithstanding the average yield per acre improved slightly.

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As the estimated annual consumption of potatoes in New South Wales is in the vicinity of 115,000 tons (State Marketing Bureau figure for New South Wales only), it will readily be appreciated that our production falls far short of domestic requirements. To satisfy these needs, substantial imports are made from other Australian States. Outside of very small supplies from Queensland, which are more than counterbalanced by exports from the New England district of this State into Southern Queensland, and limited imports from Western Australia, the whole of the potatoes needed to augment our own production are obtained from Tasmania and Victoria.

Such a state of affairs naturally impels one to ask "Is New South Wales capable of producing the total quantity of potatoes required for consumption within her own borders and, if so, why the shortage?"

Potato growing is carried out in many districts of New South Wales, the main producing areas being situated in the elevated or Tableland divisions. The production of early potatoes is mainly confined to North Coast districts, the growers in those areas being able to reap the advantage of placing their tubers on the Sydney market when Interstate supplies are at a comparatively low ebb. Expert opinion has it that potatoes can be grown successfully on many soils although sandy loams, loams or friable clay loams, are said to be the most satisfactory. These soils, it is understood, occur in many parts of the State where climatic conditions favour the growing of potatoes and at first glance there does not appear to be any reason, from that particular standpoint, why substantially increased areas should not be planted to the crop. This would enable production to be increased, to that point at least, where this State would be relieved of the necessity of importing such a large proportion of its requirements each year.

The following schedule gives an indication of the extensive areas which are suitable for cultivation of crops in the various statistical divisions of the State:-

| Statistical Division | Total Area of Division | Area Under Crops including Potatoes | Area Under Potatoes | Suitable for Cultivation | Proportion of suitable area cultivated. |
|---|---|---|---|---|---|
| | acres | acres | acres | acres | per cent |
| Coastal: | | | | | |
| North Coast | 6,965,000 | 123,000 | 1,542 | 545,000 | 22.6 |
| Hunter-Manning | 8,396,000 | 115,000 | 1,259 | 449,000 | 25.6 |
| Metropolitan | 958,000 | 33,000 | 346 | 143,000 | 23.1 |
| South Coast | 5,968,000 | 54,000 | 974 | 351,000 | 15.4 |

/Tableland:

| Statistical Division | Total Area of Division | Area Under Crops including Potatoes | Area Under Potatoes | Suitable for Cultivation | Proportion of suitable area cultivated |
|---|---|---|---|---|---|
| | acres | acres | acres | acres | per cent |
| Tableland: | | | | | |
| Northern | 8,069,000 | 76,000 | 5,802 | 440,000 | 17.3 |
| Central | 10,716,000 | 381,000 | 7,313 | 1,677,000 | 22.8 |
| Southern | 7,062,000 | 41,000 | 1,633 | 402,000 | 10.2 |
| Western Slopes: | | | | | |
| North | 9,219,000 | 431,000 | 221 | 1,814,000 | 23.7 |
| Central | 7,723,000 | 1,018,000 | 51 | 4,252,000 | 23.9 |
| South | 11,239,000 | 1,376,000 | 470 | 5,123,000 | 26.9 |
| Riverina: | 17,004,000 | 1,478,000 | 17 | 7,349,000 | 20.1 |

The above figures were published in the Official Year Book of New South Wales and are illuminating inasmuch as they disclose that in quite a number of divisions substantially less than a quarter of the lands suitable for cultivation is under crop of any description.

Let us assume that only 4% of the total area under crops of all kinds (excluding potatoes) within the statistical divisions which at present embrace the main potato-growing areas, i.e. the North Coast, Hunter-Manning, Northern, Central and Southern Tablelands, are suited to the production of tubers. This would give us an area of 28,738 acres and applying the average yield per acre for the twenty year period ended season 1935/36, viz. 2.15 tons would result in an aggregate yield from that area of 61,786 tons. Assuming further that the area already under potatoes and the yield obtained last season (22,745 acres from which 62,882 tons of potatoes were harvested) remain constant, our estimated annual consumption of 115,000 tons would be more than met by domestic production. The Commonwealth Statistician estimates Australian consumption at 119 lb. per head of the population. On this basis, annual consumption in New South Wales would be 140,000 tons and even this requirement would be met from New South Wales sources of supply if only 5% of the total area under crops of all kinds other than potatoes were devoted to that crop.

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It is recognised, of course, that in addition a considerable part of the areas suitable for cropping is used as grazing land for which it is better adapted from an economic point of view as well as climatic and other considerations, but the figures illustrate in a striking fashion what a small proportion potato crops bear to the total area under cultivation.

It is reasonable to assume that the necessary soils are available in districts having favourable climatic conditions, and other reasons which would account for the retrogressive state of the potato growing industry must be looked for. It is safe to say that much of the land in districts suitable for potato growing is used for the production of other crops or given over to some farming activity which is considered more profitable by the party using the land. Land-holders in such districts, however, may find it worthy of consideration as to whether they are engaging in a line of production which is the most advantageous.

In some quarters it is claimed that the marked irregularity of prices and the resultant unreliability of returns to growers, acts as a deterrent to any substantial expansion. It is true that considerable fluctuations have occurred in market prices from year to year and this is borne out by the following schedule which sets out the yearly average wholesale prices per ton which ruled for local potatoes on the Sydney market during 1920 to 1936.

Potatoes (N.S.W.)

Average Wholesale Prices (per ton) 1920/1936.

| Year | £. s. d. |
|---|---|
| 1920 | 12. 6. 3. |
| 1921 | 5.19. 0. |
| 1922 | 7.12. 6. |
| 1923 | 11. 9. 3. |
| 1924 | 6. 6.10. |
| 1925 | 11. 5. 7. |
| 1926 | 12.18. 3. |
| 1927 | 8. 1. 0. |
| 1928 | 5.13.10. |
| 1929 | 6.13. 6. |
| 1930 | 7.11. 6. |
| 1931 | 6.10. 8. |
| 1932 | 6. 0. 0. |
| 1933 | 4.12. 0. |
| 1934 | 6.17.10. |
| 1935 | 9. 4. 1. |
| 1936 | 7.18.11. |

/One is....

One is disposed to the view, however, that there are other contributing causes. Generally speaking, the quality of the tubers produced in the main growing districts compares very favourably with potatoes grown in other States, and in this regard the valuable work of the Department of Agriculture and of the Potato-growers' Council relating to seed certification and other activities must not be over-looked. However, many local growers do not pay sufficient attention to the "get-up" of their produce for market. The use of bags which have previously held fertiliser and those that are badly stained through various causes does not tend to impress buyers favourably. In many instances also, insufficient attention is given to that very important point, viz. grading. It is quite common for a consignment reaching metropolitan markets to require regrading, thereby adding an additional item to the grower's costs of marketing. The producer would be well advised to put good quality tubers into bags bearing his brand and thus play his part in obtaining a better appreciation of the virtues of the locally grown product.

Summed up, the position appears to be that the quality of the local potato is right but the methods employed in marketing leave much to be desired. It must be borne in mind that growers in other States will fight hard to maintain their prominent position in New South Wales markets and it is apparent that if local producers are to compete with any great degree of success with those of Victoria and Tasmania they must grow as good an article and give at least equal attention to the principles of efficient marketing.

There seems to be ample room for an expansion of the industry in the State and given proper cultural methods and effective marketing, producers are afforded the opportunity of obtaining reasonable returns.

S.D.R.

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The State Marketing Bureau within the last day or two issued a review of wheat crop conditions in New South Wales as at 1st September. A brief statement as to the position at the date mentioned should prove of interest to our readers.

Prior to mid August the outlook over a large proportion of the wheat belt was causing much concern. Subsequently, fair to good rains were received and these falls relieved the position very considerably. Sowings for the most part were responding well to the changed conditions but in many areas favourable weather with further rains will be necessary during September and October to enable them to recover from the serious setback experienced and to yield reasonably well. Over the greater part of the North West prospects were mainly satisfactory although in other divisions wide variations were apparent.

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## SALE OF FRUIT AND VEGETABLES - FACILTTIES IN THE SUBURBS OF SYDNEY.

In order to ascertain the extent of the facilities available for the distribution of fruit in the suburbs of the Metropolitan area of Sydney, the Director of Marketing, some years ago, wrote each of the Municipalities and Shires within that area. Request was made of each of the sixty Municipalities and eight Shires concerned for particulars as to the number of shops, stores or stands from which fruit is retailed. Replies received totalled 56, of which 50 were from Municipalities and six from Shires. Following is an indication of the nature of these replies:-

| | | |
|---|---|---|
| (a) | Letter merely received by Council ........................ | 1 |
| (b) | No record of number of shops, etc. ........................ | 4 |
| (c) | Will render assistance if officer sent .................... | 1 |
| (d) | No shops in area ........................................... | 1 |
| (e) | Payment required for information ........................... | 2 |
| (f) | No record, but number given from knowledge ................. | 1 |
| (g) | Numbers of shops and stands given separately ............... | 8 |
| (h) | Numbers of shops and stands given as one total ............ | 15 |
| (i) | Numbers of shops only ...................................... | 23 |
| | Total..... | 56 |

It will be observed that 47 of the Metropolitan local governing bodies responded to the request made by furnishing the information sought, or its equivalent: their action is a genuinely helpful contribution to the all-important task of analysing the fruit-retailing facilities of the greatest market in the Commonwealth for fruit-growers, as for all primary producers. There is the closest inter-dependence between urban and rural interests in Australia and the action of these Metropolitan Municipalities and Shires illustrates how widespread is the recognition of that fact in our greatest urban area.

The returns furnished were tabulated and the tabulation is, in itself, an interesting and instructive commentary upon the available facilities for fruit distribution. A few examples may be quoted. Balmain, with a population of 28,000 had 35 fruit shops and one stand, equalling one shop per 800 inhabitants. Bankstown with 25,000 inhabitants had 37 shops and stands, or one per 676. Glebe, with less than 20,000 inhabitants had 42 shops and 8 stands, or one shop per 400 of population. Kuringai with just under 28,000 inhabitants had 29 shops and one stand or one shop per 933. Paddington enjoyed the distinction of being the greatest fruit-retailing area in the Metropolis of Sydney, if number of shops be a guide; her population of 24,600 being catered for by 60 shops and stands in which fruit is sold. Area, of course, is a factor as well as

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population and it is significant that Paddington has an area of only 421 acres while Bankstown and Kuringai, for example, comprise nearly 20,000 acres apiece. It would appear that the greater the concentration of the population, the greater the opportunity for fruit-selling. That this should be expected is shown by experience in the City proper where concentration of pedestrian traffic is the root cause of buoyant business establishments.

With a view to obtaining up-to-date information and making a further survey of the kind, the various Shires and Municipalities were recently communicated with. Replies so far received total 53 and details of the results obtained will be made available in a future issue of this publication.

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

The following article is the third to appear under the above heading and will conclude the present series:-

Preparatory to discussing the marketing of fish in New South Wales, let us consider where production ends and marketing commences. A survey of production was included in the previous articles. Such production ends when the fish is caught, lifted out of the sea and detached from the net or hook, the process of marketing having then commenced. Subsequent operations may be divided into two classifications. The first includes handling prior to packing in boxes, the actual packing and the transport to the market centre. The taking of delivery at rail or boat, the transport to and, above all, the selling in the markets constitute the second stage. Proceeding with the first phase of marketing, we will take, for example, fish caught in the Clarence River area which, as has been previously stated, is the most important of the coastal estuaries as regards yearly production. Upon capture, the fish are placed with ice in cases of convenient size. They are then despatched by boat or motor lorry to Grafton, from whence they are railed to Sydney in ample time for the following morning's market. This day in transit, far from being detrimental to the quality of the product, is actually found to be of benefit as the packing in ice renders the flesh quite firm, thus facilitating handling and improving its keeping qualities and marketing value generally. Agents and the trade for the most part are of the opinion that supplies so treated are better and more wholesome than fish marketed, direct upon capture, without the chilling process.

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It is, of course, important to remember that by no means all of the fish caught in the coastal lakes and estuaries are forwarded to the Sydney Municipal Fish Markets for sale. Appreciable quantities captured in such areas are transported by road to the principal inland cities and towns. For instance, Armidale and Tamworth are supplied daily by this means with fresh fish from various parts of the North Coast. Then, again, Melbourne draws extensive supplies from southern estuaries of New South Wales. In country towns of New South Wales the principal method of distribution is by means of hawking from house to house rather than selling in a central market. It is expected that aviation will play a great part in the future development of the industry in distant places, where fresh fish is at present difficult to obtain. In fact, this phase of distribution is already in its experimental stages, and has met with a measure of success. It is planned to provide more than forty western towns daily by this means and it will be possible for towns as far west as Narromine and Bourke to be supplied with sea-fish a few hours after capture.

On turning to the wholesale marketing of fish in Sydney, it must be stated that the question is primarily one of facilities. A fish market is at present provided and controlled by the City Municipal Council and is situated in the Markets area near Central Railway Station. This market is open daily for the receipt of fish at any time after 9 p.m., but is not open to buyers until 5 a.m. the following day. This permits agents to take delivery of their various stocks and to display them conveniently and to the best advantage, prior to the commencement of selling operations. The bulk of the fish offered in this market is forwarded by the fishermen to the agents on consignment, although a few sellers dispose of their own locally-captured stocks. Sales to buyers are effected by private treaty. The selling of fish by auction was in operation in the earlier stages of the industry when supplies were less extensive, but it was abandoned some years ago in favour of the system at present in existence.

In addition to space for displaying and selling the goods, facilities are available to buyers for the scaling, cleaning, washing and filleting of the fish before they are removed. Men who, through years of experience, have become skilful at these operations, may be hired by buyers if they so desire. In the cleaning troughs at present provided, fresh water is used for washing purposes. Many persons in the trade have expressed the opinion that salt water is more suitable for this operation as it enhances the keeping quality of the fish, which is particularly important during the summer months. It is not economically possible, however, to provide the existing markets with sea water and, as they leave much to be desired, both as to size, equipment and conveniences, a proposal has been put forward for the erection of a modern building on a more suitable site. The development of the fishing industry has made the provision of more adequate facilities in the near future a necessity. Several places have been suggested as a site for these newmarkets, but none

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has yet proved itself wholly suitable. The latest proposal is that the present building be enlarged by the addition of a storey. The ground floor could then be used for cleaning and refrigeration purposes and the upper section for selling. This suggestion is viewed favourably by all members of the trade as it is realised that the provision of salt water for cleaning the fish is such a difficult matter that it merits only secondary consideration.

The prices of fish fluctuate considerably and these fluctuations are largely due to the variability of the quantities available. Buyers with well-established businesses are obliged to purchase their stocks regardless of cost in order to keep faith with regular customers and fulfil standing orders. The consequent increased competition is often the cause of exceedingly high price levels during a time of scarcity. The trade, however, has hopes of regulating supplies in the future and thus stabilise prices by the use of cool-storage, particularly the "quick-freeze" process. This it is hoped would enable surplus stocks in times of plenty to be carried over in perfect condition for use during periods of scarcity. The opinion has been expressed by persons well-versed in matters appertaining to cool-storage that it would be advantageous if freezing works were erected in close proximity to the point of capture of the fish so that they could be well chilled, then packed in ice and sent to market in the quickest and most direct way. It is held that this method would be even more beneficial than the use of ice alone, as at present. The advantages of refrigeration are so obvious that there is little doubt that in the near future it will be put into general use in all sections of the fishmongering trade, thus providing the consumer with fresh and wholesome fish at all times.

Thus, in concluding a short survey of the history and development of commercial fishing in New South Wales, it can confidently be stated that if the potential production of our coastal waters is exploited to its fullest extent a bright future is in store for this industry.

E.J.C. & T. McK.

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The Director of Marketing has received a communication dated 4th August, 1937, from the Cargill Crop Bulletin, Minneapolis, U.S.A., indicating that the harvest was then nearing completion in that country. The letter went on to say that the winter wheat harvest was finished with good results, although the black stem rust took a heavy toll of the wheat in Illinois, Indiana and Ohio, or the soft wheat area. The hard wheat section of the country turned out splendid yields of good quality wheat. Spring wheat was being harvested in the Northwest; South Dakota was nearly finished, southern Minnesota and southern North Dakota had started and was well advanced in this section. Black rust had also taken a heavy toll on the spring wheat together with heat and grasshoppers, but a fair crop was expected to be harvested. The Northwest Pacific Coast States had started harvesting and the results so far had been very good. The latest returns give winter wheat around 648 million, with spring wheat 193 million bushels.

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## THE ORGANISATION OF THE WINE INDUSTRY FOR MARKETING PURPOSES.

South Australia has the largest area of vineyards, with Victoria second and New South Wales third, followed by Western Australia and Queensland in that order. The average acreages for ten seasons 1925-1935 were:-

| | |
|---|---|
| South Australia | 51,911 |
| Victoria .. | 40,221 |
| New South Wales | 15,097 |
| Western Australia | 5,246 |
| Queensland .. | 1,783 |
| Total | 114,258 |

There was comparatively little noticeable fluctuation throughout.

In 1934-35, of a total Australian yield of 360,694 tons of grapes, 12,511 tons were used for table purposes, 95,793 for wine and 252,390 for raisins and currants, the respective values for the various States being:-

| | N.S.W. £ | Vic. £ | Q'land £ | S.A. £ | W.A. £ | Total £ |
|---|---|---|---|---|---|---|
| Table | 84,890 | 38,913 | 65,665 | 7,332 | 66,472 | 263,272 |
| Wine, etc. | 71,260 | 57,192 | 3,050 | 466,943 | 15,614 | 614,059 |
| Dried | 177,040 | 1,538,462 | - | 832,222 | 136,923 | 2,684,646 |

The average wine productions for ten seasons 1925-1935 were:-

| | | |
|---|---|---|
| South Australia | 12,529,365 | gallons |
| New South Wales | 1,693,062 | " |
| Victoria .. | 1,639,231 | " |
| Western Australia | 359,781 | " |
| Queensland .. | 39,182 | " |
| Total | 16,260,621 | " |

In New South Wales, approximately half of the acreage of vineyards is devoted to wine grapes, situated in the following districts:-

| | | |
|---|---|---|
| Murrumbidgee Irrigation Area | 4,000 | acres |
| Hunter River .. | 1,700 | " |
| Corowa .. | 900 | " |
| Small plantings at Mudgee, Forbes, Inverell, etc. | 900 | " |
| Total | 7,500 | " |

/On the...

On the Murrumbidgee Irrigation Area, which produces three-quarters of the State's total wine, most growers sell their grapes to wineries, which are also distributors or sell to distributors, but in the other districts the growers make the wine themselves and then sell to merchants.

In South Australia, the system of disposal is similar to that in the Murrumbidgee Irrigation Area, whilst in Victoria the two practices prevail, as, in some areas, such as the River Settlements, the grapes are sold to winemakers or distillers, whilst in other localities the growers make the wine themselves.

As the production of wine exceeds local requirements, a considerable quantity has to be exported, the figures for the past two years being:-

| | | |
|---|---|---|
| 1934/35 | .. | 3,394,593 gallons |
| 1935/36 | .. | 3,709,958 " |

the bulk of which was shipped to England. Although a measure of preference is extended to Empire wines under the British tariff regulations, this is not sufficient to offset the lower costs of production and the advantages of cheap freight to the English market of European wines. Therefore, in order that the Australian surplus wine might be exported without loss to the wineries, the Commonwealth Government passed the Wine Export Bounty Act, 1934, and put this into operation as from 1st March, 1935; this Act granted a bounty of 1/3d per gallon on fortified wine exported, provided that the maker had paid the grower the prices fixed, by regulation, for the grapes used; a lower rate of 1/2d per gallon is now payable as bounty.

The grape prices for each year's vintage are arrived at by the Grape Price Fixation Committee, of six representatives from the various States, presided over by the Comptroller-General of Customs, with several expert officers present in a consultative capacity, and recommended to the Minister for Trade and Customs, who, under the authority of the Wine Export Bounty Act determines the prices and issues a regulation accordingly.

The Wine Overseas Marketing Board was established under Federal Legislation in 1929, and consists of eight members, one appointed by the Commonwealth Government and the others elected by the industry (proprietary and co-operative wineries and distilleries) in New South Wales, Victoria, Queensland and South Australia. This Board controls exports as to quotas shipped and the minimum prices to be charged etc., and has a representative in England to watch its interests there. A levy of 1/6d per ton is made on all grapes used in the Commonwealth for the manufacture of wine and spirit in order to meet the administrative and other expenses of the Board.

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There are a number of State associations, e.g. The Co-operative Wine-making Companies of New South Wales, and the Rutherglen Vine-growers' Association, covering practically all the large wine-makers and exporters, and representing approximately 90% of the wine produced, which are affiliated with the Federal Viticultural Council and send delegates thereto; this Council elects the industry's representatives on the Grape Price Fixation Committee and Wine Overseas Marketing Board.

In New South Wales the growers on the Murrumbidgee Irrigation Area decided, by a poll held under the Marketing of Primary Products Act, to establish a Wine Grapes Marketing Board for the Shires of Willimbong, Wade and Carrathool, and this Board, consisting of two Government appointees and 5 elected representatives of the producers, was proclaimed on 3rd February, 1933. Since its inception, the Board has negotiated with the proprietary wineries on the Area each year as to the prices to be paid for grapes.

Although there are considerable areas of land suitable for wine growing and the production of various types of wine, there are no immediate prospects of any material expansion of the industry, as this depends on securing a suitable overseas market and the profitable export of wine without the payment of a bounty.

C.K.

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The question of finding an outlet for table grapes grown in New South Wales led to an inquiry being made recently as to the quantities imported into Singapore. A communication has now been received from the Australian Trade Commissioner in the Netherlands East Indies giving particulars of imports between July, 1935 and June, 1937. The details are as follow:-

| Country of Origin | July-December 1935 | January-December 1936 | January-June 1937 |
|---|---|---|---|
| | cases | cases | cases |
| Australia | 105 | 28,285 | 30,459 |
| U.S.A. | 18,242 | 22,260 | 3,405 |

The value of the fruit is not available, but from reliable sources the following estimate of imports for the twelve months ended 30th June, 1937, has been obtained:-

| | Boxes | Approximate Value |
|---|---|---|
| Western Australia | 13,000 | st.$ 65,000 |
| Eastern Australia | 8,000 | " " 44,000 |
| U.S.A. | 16,000 | " " 80,000 |

The Commissioner goes on to say that there are no restrictions, quotas or import duties imposed on the import of fresh grapes into Singapore.

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## STRONG DEMAND FOR SHEEP AND CATTLE AT HOMEBUSH SALEYARDS, SYDNEY.

The pennings of sheep and lambs at the Homebush Saleyards during August were comparatively light, available supplies totalling 234,022 or about 9,000 short of the July total. Going back to the sheep and lambs yarded during August of last year it was found that they were approximately 55,000 head less than during the current year so that the small yardings can only be regarded as seasonal. Over a large area of the State shearing was in progress and owners were holding back stock for the wool clip and improvement in the numbers comihg forward is not anticipated in the very near future. Adverse seasonal conditions experienced throughout the greater part of the year have created quite a scarcity of really good quality sheep, and now that conditions have improved in many centres owners will, no doubt, hold stock in order to improve their condition and market value.

In continuance of the three day's selling week, sheep have been sold each Friday during the month. Sales have received very little support, actual pennings being 3,387 head, made up of 1,103, 1,107, 528 and 649 head on the respective Fridays. Figures for July were 12,677 head.

Larger numbers of shorn sheep are making their appearance and occasional consignments have been very attractive. Full woolled sheep, however, predominated, some lines carrying exceptionally heavy skins. The wethers and ewes yarded were chiefly of fair to good trade quality, while suitable export lines were also fairly well supplied; a substantial number of plain, and in some instances very plain sheep, were yarded.

There has been an improvement in the suckers yarded each sale day, both in regard to quality and numbers. This does not necessarily imply that all the suckers yarded were prime; far from it. Quite a number were noticed lacking in finish and condition, having a dry and wasted appearance. Apart from these, however, they were for the most part very fair to good with some pens, notably Southdown cross and Dorset Horn cross, in very prime condition and of choice quality.

There was a particularly good demand for the greater part of the month, values reaching the highest level for this year. All grades of sheep and lambs were dearer than during July, best prices for wethers being 42/-, ewes 40/-, suckers and old lambs 37/- per head. Generally prices for good quality wethers ranged from 27/- to 37/-, ewes 20/- to 30/- and suckers and lambs 25/- to 31/- per head, with relatively lower figures for the plain to medium grades.

/Several ....

Several advances of from 1/- to 2/- per head occurred for both sheep and lambs with consequent higher prices per lb. on the hoof. Again, skin values depreciated thus advancing the cost of mutton and lamb to the consumer. Best quality sucker lambs cost 7½d per lb. on the hoof with fair to good trade realising from 6½d to 7d per lb., representing an advance of approximately ½d per lb. on July values.

Prime light wethers which could be obtained for 3½d per lb. early in the month were in strong demand during the closing sales at 4½d and in some instances 4¾d per lb. on the hoof. Ewe mutton advanced by over 1d per lb. and sold up to 4¼d.

Old lambs and hoggets also met with an improved demand, rates appreciating by ⅛d to ¾d per lb., according to the quality offering.

The strong position of the markets throughout has resulted in highly satisfactory returns to the producer, but the resultant high price of mutton and lamb to the consumer has somewhat affected the consumption of these commodities by the public.

A slight falling-off in the numbers of cattle yarded was noticed, the total being some 29,000; however, last years figures for the same period were easily exceeded. Truckings from Queensland accounted for a little over 700 head, or just short of half of the total forwarded for July sales, while store stock included in the supply was in the vicinity of 2,400 head.

It is gratifying to note that the unfavourable position in regard to pastures that existed at the close of July has been relieved by the receipt of fairly good rains over wide areas. Falls which have been experienced recently should further improve prospects. Reports that cattle in many centres are in fair condition and mostly improving should be pleasing to all sections of the industry; with a continuance of favourable conditions better quality yardings may be expected at Homebush in the future.

Cattle that passed through during the period under review were for the most part only fair to good trade beef. There were also large numbers of plain and, at times, very inferior descriptions offered. On almost every sale day, however, a moderate showing of quality cattle was available, which met, to a certain extent, the exceptionally strong demand experienced throughout the month.

With the exception of odd fluctuations in values of plain and medium quality descriptions, the market, already a satisfactory one from the graziers' viewpoint, showed a strong upward trend until towards the close of the period. At this stage certain buyers commenced operations on behalf of the Melbourne trade, and this was responsible for a sharp rise in values which were maintained, and

/even....

even bettered by the end of the month. All grades of cattle participated in the rise to a greater or lesser extent depending mainly on quality and to a limited degree on their suitability for the requirements of buyers.

As illustrating the sharp rise the following instance may be cited. A draft of good to prime bullocks and steers which was sold early in the period realised the equivalent of 33/- per 100 lb. of beef, while a line of similar quality stock of approximately equal killing weights was worth 40/- per 100 lb. at the latter end of the month. The rise per head in the case quoted amounted to an average of £2.5.0.

Of the bullocks and steers yarded it could be said that a great majority was plain but occasionally attractive consignments were noticed. A few pens of very nice Devons were at times in evidence, while on one particular day perhaps the largest draft of Aberdeen Angus cattle seen at Homebush for some time was on offer.

Cows and heifers were heavily supplied on most sale days, but although good to prime descriptions were sometimes included in fair numbers plain and medium lots were all too numerous. This state of affairs was very often responsible for a weakening in values, some lots being disposed of at comparatively low rates. On the other hand, good to prime cows and heifers met with an exceptionally strong demand. A typical sale of quality heifers disposed of at the top of the market was a line of Shorthorns weighing 520 lb. realising £9.15.0 per head; they were worth slightly over 37/- per 100 lb. on the hoof.

Throughout the whole of the month vealers and yearlings were rather scarce, buyers often experiencing difficulty in obtaining suitable lines. The position was relieved slightly on occasions but at no time were quality lots easy to secure.

From information available there are indications that the peak of values has not yet been reached. With a continuance of improved pastoral conditions, the outlook for owners is better than for some considerable time.

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The problems which are besetting the poultry farming industry in this State are also affecting those engaged in the industry in South Australia. It was recently announced that owing to the high prices ruling for poultry foodstuffs, costs had become much greater and the stabilisation of egg prices at a higher level was necessary. This has resulted in the formation of an Egg Equalisation Committee to operate in conjunction with Boards in other States.

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

Stocks of potatoes on the Sydney market during August were far in excess of trade requirements. Owing to a particularly good season in Tasmania, exports are well ahead of those of last year. (To date, 1,031,649 bags of tubers have been exported as compared with a total of 844,624 bags for the complete year, 1936, the bulk of these shipments being marketed in Sydney). A general decline of 10/- per ton resulted and clearances, even at the lower prices, were difficult to effect. Rates for the 116,713 bags received during August ranged as follow:- Brownells £5.10. 0 to £6. 0. 0; Bismarcks £4. 0. 0 to £5. 0. 0; Snowflakes and Arranchiefs £4. 0. 0 to £4.10. 0 per ton. The slackness in inquiry which was in evidence in Sussex Street also ruled at the Alexandria Market. Local growers forwarded 16,274 bags, a similar supply to that of last month. Prices, during the early part of August were fairly satisfactory, but later they showed a considerable depreciation. The following is a complete range of sales by auction:- New South Wales No.1 Grade £3. 1. 8 to £5.16. 8; No.2 Grade £2. 1. 8 to £5. 1. 8; Seed £2. 1. 8 to £4.16. 8 per ton. It is worthy of mention, however, that the quality of the offering was in no way below the standard set last month.

The market for Victorian brown onions was very firm. Supplies which arrived by sea, totalling 6,550 bags, were well within the needs of buyers and, as a result of the ensuing increased competition, prices showed a general advancement. Each week the shipments cleared rapidly on arrival at prices ranging from £13. 0. 0 to £14. 0. 0 per ton according to size and quality. Pickling onions were quoted at upwards of £18. 0. 0. Rail receivals totalled 767 bags for which a steady demand was reported at from £12.10. 0 to £13.10. 0 per ton.

Inquiry for pumpkins in Sydney during August was more satisfactory than at any other time this year. The greater part of the supplies on offer was consigned from Queensland districts. There was, however, no material difference between the respective qualities of local and Queensland pumpkins and prices were similar. Rail offerings from various centres amounted to 74 trucks. Clearances were fairly brisk at from £4.10. 0 to £7. 0. 0 per ton. Shipments from Queensland approximating 450 bags were available in Sussex Street and sold well at £6. 0. 0 to £7. 0. 0.

Although supplies of Tasmanian swedes were much larger during the period under review, prices were unchanged. Agents experienced little difficulty in disposing of the 4,720 bags received at from £4. 0. 0 to £5. 0. 0 per ton. Rates for the 3,240 bags of Tasmanian carrots on offer advanced considerably as compared with last month. Early in the month they were as high as £10. 0. 0 per ton but later they depreciated to £6. 0. 0. Inquiry for the 1,291

/bags...

bags of parsnips also available was reported to be most satisfactory. Steady clearances took place at from £5.0.0 to £8.0.0 per ton. It is worthy of note, that despite the heavier offering of potatoes, inquiry for vegetables showed no falling-off and in some instances it even improved.

The upward tendency in demand for forage, which was a feature of July trading, was again noticeable during August. At Alexandria during the early part of the month, grain chaff was extremely scarce and prices, under the influence of keen competition, soared to the highest level recorded since August, 1930. The position, however, returned to normal with the commencement of shipments of oaten chaff from Tasmania. Supplies from that state totalled in all approximately 23,200 bags and represented the first appreciable shipments for over five years. Local oaten chaff was more lightly supplied at Alexandria, only 121 trucks being received. Prices ranged from £5.0.0 to £8.5.0 per ton according to quality, whilst Tasmanian stocks were quoted at £4.10.0 to £7.10.0 in Sussex Street. The 39 trucks of wheaten chaff received acted more or less as a supplement to oaten and prices were regulated accordingly. Medium lots were sold at £4.10.0 to £5.0.0 per ton but rates for choice were as high as £8.0.0.

As regards lucerne products, it was noticeable that there was no shortage and that supplies were far in excess of those received during July. It is probable that, had these stocks not been forthcoming, prices of grain chaff would have reached unprecedented levels. Inquiry for the 117 trucks of lucerne chaff offered was adversely affected by the generally poor standard of the receivals. At all times a large carry-over of inferior and medium grades was in position and agents experienced difficulty in disposing of this even at prices as low as £5.0.0 to £6.5.0 per ton. All average to choice lots, however, met a ready inquiry at from £7.0.0 to £9.0.0 per ton, although very few sales took place at the latter figure. The position as regards lucerne hay was much more satisfactory. A high percentage of the 234 trucks at rail was from the Maitland district. These stocks were of immature quality but, if consumed promptly, they represented an excellent stock-fodder, which, comparatively speaking, was the cheapest obtainable. For this reason, competition was extremely keen and clearances of these offerings were far more rapid than of those from other districts. Soft and heated consignments were sold at as low as £2.0.0 per ton but the majority of the realisations ranged from £3.0.0 to £4.10.0 per ton. Hay of more matured quality from other centres moved out satisfactorily at from £5.0.0 to £9.0.0 per ton according to grade. In Sussex Street, 650 bales of soft Hunter River stocks were received by sea. Demand was keen at £1.10.0 to £4.5.0 per ton.

No improvement in inquiry for Victorian oaten hay was in evidence during the period under review. A total of 150 bales was

/again....

again received and prices showed no alteration at £9.10.0 per ton. Clearances were, however, far from satisfactory.

Consignments of straw from Tasmania which amounted to 3,050 bales were much lighter during August. An increase in competition resulted and rates reached a level which was 20/- per ton in advance of the previous month's realisations. Agents experienced little difficulty in disposing of stocks at from £4.10.0 early in the period to £5.15.0 per ton later. The greater portion of the 14 trucks received at Alexandria was from Victoria. Sales were also most satisfactory at from £4.15.0 to £5.12.6 per ton according to quality.

The easier tendency which was apparent in the wheat market at Alexandria during July continued to rule throughout the present period. In spite of the fact that a lighter offering totalling 46 trucks was in position, values continued to depreciate. It was noticeable, however, that less inferior consignments were available and rates presented a smaller range as follow:- Medium 5/- to 5/2½d; prime 5/4 to 5/10 per bushel.

Considerable rains in the country parts of New South Wales resulted in a marked falling-off in demand for maize. Prices fell steadily with each consecutive shipment and a general drop of 6d per bushel in the range was the result. Quotations for the 4,556 bags received were as follow:- Yellow 5/- to 5/6; White 4/9 to 5/9 per bushel. The quality of the maize showed some improvement as it was more mature than that received during July. Arrivals by rail amounted to 39 trucks. Small stocks from Queensland early in the month were sold at 5/9 to 6/- but, in sympathy with the decrease in Sussex Street, prices soon depreciated. The remainder of the offering was from local sources and cleared steadily at from 5/- to 5/8 per bushel.

The largest consignments of Tasmanian oats to be received for some considerable time were available in Sussex Street. An appreciable portion of the 3,800 bags shipped to Sydney was taken for milling purposes, but stocks offered to buyers were much in request at 4/- to 4/6 per bushel according to quality. The position as regards the 8 trucks railed to Alexandria was much the same. Rates, which ranged from 4/2 to 4/4 for choice, were at the highest recorded level since the first week of September, 1929.

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The Livestock Industry Bill recently passed in Great Britain provides for the constitution of a permanent Livestock Commission charged with the functions of keeping generally under review the production, slaughtering and marketing of livestock and of advising and assisting Ministers in matters relating to the industry.

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## TRADING IN FRUIT AND VEGETABLES AT THE CITY MUNICIPAL MARKETS, SYDNEY.

Although fruit, with the exception of apples, was in more or less moderate supply the market generally throughout the period was rather quiet. This may be accounted for to some extent by the high prices ruling for green vegetables throughout the greater part of the month. The apple market was not a bright one and there is little prospect of any material improvement during September if large quantities of inferior quality fruit continue to come forward. Shipments from Tasmania were heavy, aggregating approximately 172,000 cases for the month; the consignments consisted largely of small French Crabs and Sturmer Pippins which were practically unsaleable even at the low prices at which they were offered. Agents were able to clear the larger sizes of these varieties at fairly satisfactory prices provided the quality was good. French Crabs showing any sign of colour were neglected by buyers. There was a steady demand for selected sizes of choice, coloured sorts such as Jonathan, Scarlet Pearmain and Crofton, but small and inferior fruit of any description was difficult to sell. The only apple which was sought after to any extent was New South Wales grown Delicious, which sold readily at very satisfactory prices, some "specials" realising 15/- per case. This may be attributed to the general popularity of this variety and the limited quantities available. Choice local Granny Smiths met a steady demand throughout and prices showed little variation. No material improvement in the values of this variety is anticipated owing to the rather extensive quantities still held in cool storage and the large proportion of plain grade fruit in the available supplies. Many brands which were released from cool store showed "scald" a very short time after being placed on the market and had to be sold at nominal rates to clear. A total of approximately 227,800 cases of apples were in the various cool stores of the State. The greater proportion comprised Granny Smiths.

Only moderate supplies of pears were available during the month and quality descriptions were sought after, prices being maintained at fairly high levels. Lower grades, however, were neglected and agents were forced to clear stocks regardless of price. Fancy and Extra Fancy Grade Packham's Triumph realised to 13/- with some sales at higher rates, while such varieties as Winter Cole and Josephine were about 1/- per case cheaper.

Only moderate supplies of Navel oranges came to hand from Coastal districts, but large quantities in both crates and cases were received from the Irrigation Area. In addition, fairly extensive consignments were received from Victoria, South Australia as well.. as from the Murray Valley areas within this State. Large fruit which constituted the bulk of the stocks was not popular with buyers and consequently was slow of sale; choice medium sized fruit was in request at prices which fluctuated between 8/- and 10/- per case.

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There was little inquiry for lemons for retail purposes and disposals in the main were to buyers operating on behalf of factories. Large quantities of mandarins came to hand; the greater proportion was of small size and difficult to dispose of. Large and medium fruit was in request and sold readily at satisfactory prices, but any brands showing signs of puffiness were not in demand.

Only light supplies of bananas were received throughout the month and values showed a gradual upward trend, the ruling rates at the close of the period being from 20/- to 26/- per tropical case with odd sales of extra choice fruit higher. Reports received from the producing areas of the North Coast indicate that with the beneficial rains received and the fruit filling nicely, an increase in production can be expected during September.

There was a considerable increase in the quantity of pineapples from Queensland but prices remained steady at 7/- to 10/- per tropical case with special brands higher. As usual, a proportion of the consignments were exported to New Zealand where they are reported to be selling well.

Papaws were also in more plentiful supply which resulted in a considerable reduction in prices.

Heavy consignments of strawberries were received almost daily from the Northern State, but owing to an improved demand clearances were good, although in order to facilitate sales it was found necessary to reduce prices. Moderate quantities of locally grown berries were also available but, in competition with the well-coloured Queensland fruit, were slow of sale.

The moderate supplies of passion-fruit available were drawn principally from the Gosford, Mangrove Mountain district. Quality fruit found fairly ready sale but other was rather hard to sell. Values of choice lines were steadily maintained.

There was a steady increase in the quantity of peas coming forward. Earlier in the month only a relatively small proportion of the available supplies could be classed as choice, and some consignments which were affected by the wet conditions prevailing in the producing areas arrived at the markets in such bad condition that they had to be disposed of at low prices to avoid total loss. Towards the end of the month, however, there was a marked improvement in quality. Choice lines cleared steadily throughout at firm rates: medium to inferior lots were rather difficult to dispose of and quantities were sold to factories for canning purposes.

Supplies of beans from Queensland and the North Coast for the most part were only moderate and best lots were in request at prices as high as 15/- per bushel. Towards the end of the month,

/however..

however, consignments from both sources were more than doubled resulting in a considerable decline in prices.

Generally speaking, cabbages were moderately stocked and quality descriptions cleared readily at relatively high rates, up to 9/- per dozen being obtained in some instances. With increasing supplies, however, a gradual downward trend in values was apparent.

The moderate stocks of cauliflowers were drawn chiefly from the various growing centres within a radius of 40 miles of Sydney. Disposals were satisfactory and the market was maintained at fairly steady levels.

Only limited quantities of lettuce were available early in the month. Choice "heads", which were particularly scarce, were sought after at prices ranging to 4/- with some extra choice as high as 5/- per dozen. Supplies subsequently increased considerably with a corresponding decline in values.

This month marked the beginning of the season for hot-house and glass-house tomatoes, sales of early consignments of the former being effected at 20/- per half case. These prices were not maintained, however, owing to the competition of Queensland field tomatoes which were available at 4/- to 6/- and repacks at 6/- to 8/- per half-case. As quantities increased values of hot-house supplies receded to 17/- and 18/- and glass-house to 14/- and 15/- per half-case for firsts and these rates remained fairly steady throughout the balance of the period.

Weekly consignments from Queensland totalled in the vicinity of 12,000 half-cases and these cleared well at the above-mentioned rates with an advance of about 1/- to 2/- per half-case towards the end of the month.

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The Government of New South Wales has appointed Mr. J.E. McCulloch Stipendiary Magistrate a Commissioner to inquire into the fruit industry of this State and make recommendations with respect to:-

(a) The costs and method of production, and of marketing, and of sale and other disposal of fruit grown in New South Wales.

(b) Improvement in the financial position of the Fruit-growers in New South Wales, and

(c) Manufacture and sale or other disposal of by-products of fruit grown in New South Wales.

The Commissioner is also required to investigate and report upon matters associated with the orchard and nurseries registration fee.

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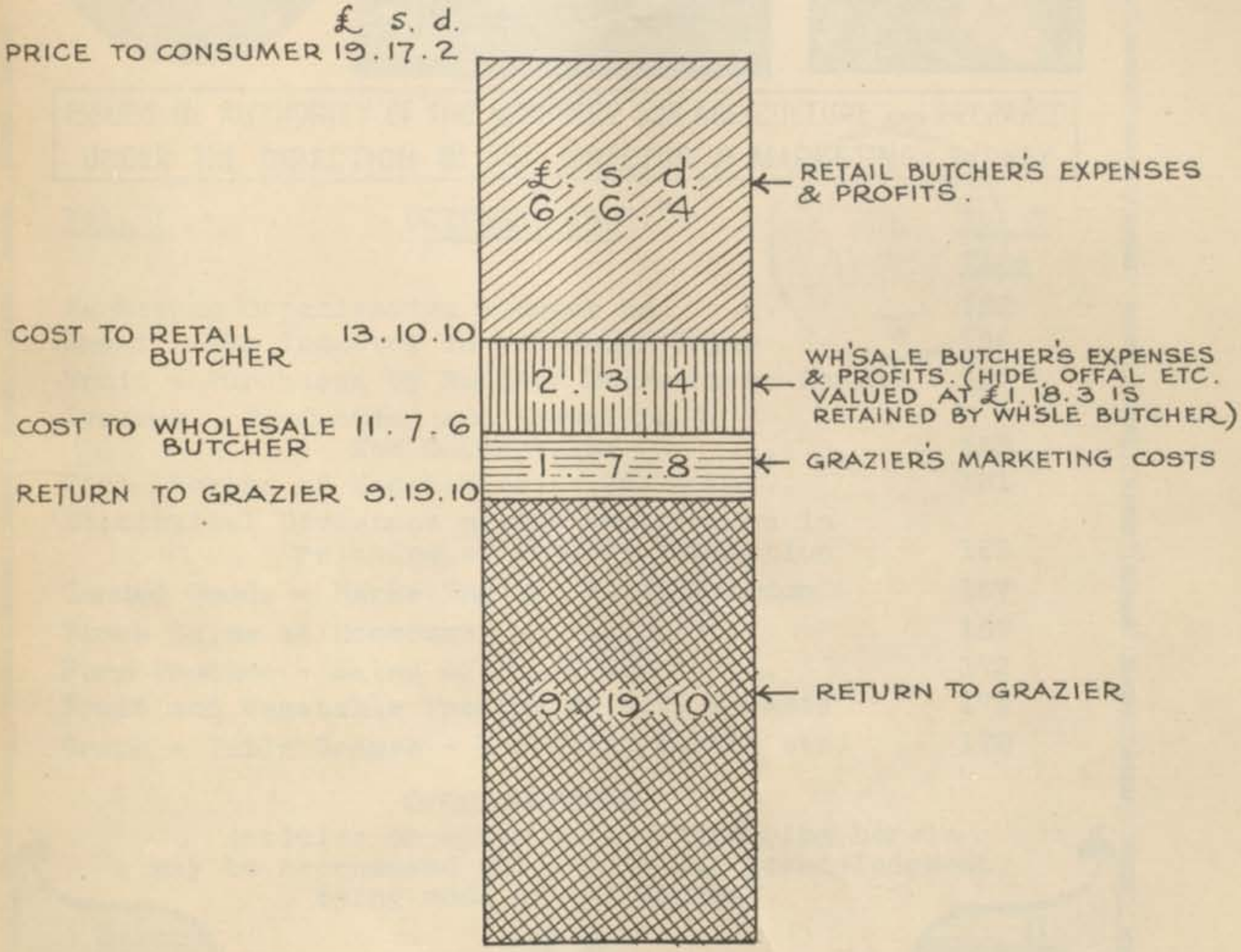
STATE MARKETING BUREAU - DEPT OF AGRICULTURE N.S.W.

C.I.C. 37.1007.

# CATTLE

## COSTS OF MARKETING, KILLING & DISTRIBUTION INCLUDING "SPREAD" BETWEEN THE RETURN TO THE GRAZIER AND PRICE PAID BY CONSUMER.

## AUGUST 1937




<u>BASIS OF GRAPH</u> :- A BULLOCK WEIGHING 1100 LB. (DRESSED WEIGHT APPROX 650 LB.) SOLD ON HOOF FOR £11.7.6.

Compiled: J. H
Drawn: E. H. S.
Checked: D. R.

A. A. WATSON
DIRECTOR OF MARKETING