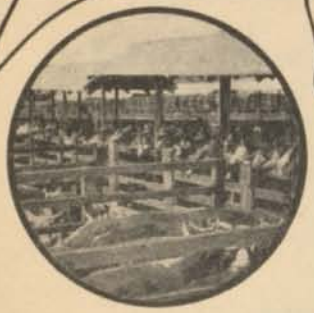
STATE MARKETING BUREAU - DEPARTMENT OF AGRICULTURE. N.S.W

# 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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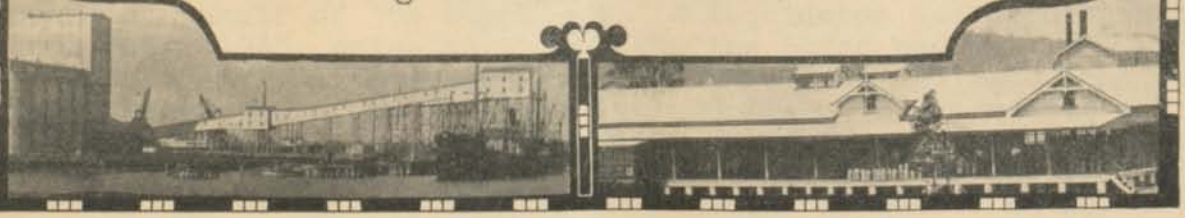

MONTHLY MARKETING REVIEW.

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.

II.

Further reference to the defunct Honey Marketing Board of New South Wales is, perhaps, necessary if only for the reason that the writer of these notes is not aware of any other instance of a Marketing Board, producer-created and producer-controlled and constituted under State marketing legislation, having gone out of existence. As said in these notes in last month's issue of "Monthly Marketing Review", the Honey Marketing Board was dissolved as the result of a poll held on 24th August, 1932. The New South Wales Marketing of Primary Products Act provides that an order to wind-up in such circumstances shall be made at any time within twelve months of the date of the poll. The Act has in mind that it may be undesirable, perhaps impracticable, to wind up an established business, with its various commitments, in less than twelve months. When the order to wind-up is made, liquidation is entered upon, at the conclusion of which formal dissolution takes place.

The Honey Marketing Board ceased to function with the object of new business when the poll of 24.8.1932 resulted in a decision to dissolve. The Board had come into being on 3rd May, 1929, so that it had had a full functioning life of 3¼ years, less approximately the first twelve months of its existence, during which preliminary organisation work occupied most of its time. At the date of the dissolution poll (24.8.1932) the Board was operating its second and final pool and there were approximately 4,500 60 lb. tins of honey on the Board's floor, the property of the Board on behalf of its suppliers. A liquidator was appointed on 14th July, 1933, prior to which date the Board had sold the whole of this honey and practically all of its plant and equipment and distributed the proceeds among its suppliers in accordance with the law. It remained for the liquidator to clear up outstanding matters, to prepare and arrange for a comprehensive audit by the Auditor-General and to make final dispositions: these duties having been duly performed, the Board was formally dissolved by Proclamation dated 2nd October, 1936.

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It would be a very great mistake to suppose that the fact of dissolution having been decided upon meant that the Honey Marketing Board had to sacrifice the 4,500 tins of honey it had on hand at that time. The wisdom of Parliament in giving a Board, in such circumstances, up to twelve months before being required to proceed to wind-up was made abundantly manifest. The said 4,500 tins of honey were sold by the Board over a period of two months at rates which aggregated a sound return. The proceeds were paid into the pool and the yield of that concluding pool (1932/33) on final distribution of the proceeds, showed an average realisation, exclusive of Board costs and over all grades of honey, of 18s.1½d per tin or 3⅝d per lb. The satisfactory nature of this return to the industry was not questioned. When the liquidator had finished his work, he found himself with the sum of £335.10.7 in hand. The Commercial Apiarists' Association of New South Wales agreed that the best method of utilising this money would be to apply it towards costs connected with the publication by the Department of Agriculture of a book, in course of preparation by the Government Apiarist, dealing with "Honey and Pollen Flora of New South Wales". Recently, at the request of that body, £55 of the sum in question was made available for the furtherance of a publicity campaign, sponsored by the Commonwealth Government, in the interests of increased honey consumption.

It is of interest to note that the period of the Honey Marketing Board's existence included the worst depression years.

In our next issue, these notes will deal with constitutional aspects of State marketing legislation and some notes will be made with respect to the form and extent of the powers of English and Scottish Marketing Boards. It will then remain, in accordance with plan, to say something about Canadian Marketing Boards and similar developments in New Zealand.

(To be continued).

A.A.W.

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A recent report received from the Director of Agriculture in South Australia discloses that the hot winds experienced in the lower rainfall districts of the State, particularly where soils are of a limestone nature, have reduced crop prospects.

In the wetter districts, these conditions have improved the vigor of the wheat plant and more or less balanced up for the damage done in other areas. On the whole, slightly less favourable prospects now prevail than at the end of August, but with seasonable conditions from now on, really good wheat yields should be harvested.

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# THE WHEAT INDUSTRY OF NEW SOUTH WALES.

The history and development of the sheep and wool industry in New South Wales was the subject of a number of articles appearing in recent releases of this publication.

In this and subsequent issues it is proposed to deal similarly with the wheat industry which is second only in importance to sheep and wool among the rural pursuits of the State.

Although wheat was grown from the very earliest days of the colony, New South Wales did not become self-supporting as regards this commodity until 1897. The reason for this was probably the fact that the Coastal areas were found unsuitable for wheat culture and lack of transport facilities prevented the development of the areas in the West where the crop is now extensively grown. The deficiency was made up by imports from the other States, from Tasmania at first and later from Victoria and South Australia.

In 1860 New South Wales produced 1,581,000 bushels of wheat on 128,829 acres. In 1897 the production from 886,112 acres was 8,853,445 bushels, which quantity was just sufficient for local consumption. From this time onward production steadily advanced and, except within occasional abnormally dry years, a balance was available for export.

Up till about 1914 wheat growing was confined to the better rainfall areas on the Western Slopes and in the Riverina. After 1915, owing to the introduction of better cultural methods, the development of hardier varieties and the designing of labour-saving machinery, the wheat belt was extended rapidly into the drier areas. At the same time the development of the fat lamb raising industry and the adoption of mixed farming militated against any great extension of wheat growing in the better districts. For example, in the Waugoola Shire (Cowra), 70,000 acres were sown to wheat in 1923, whereas the area in 1933 was only 72,515 acres. On the other hand, for the Bland Shire (Wyalong), the comparable figures are 259,000 in 1923 and 469,000 acres in 1933; while for Carrathool (Griffith-Hillston) the 1923 acreage was 16,000 and that for 1933 was 245,000 acres.

Although wheat growing has been extended into less favourable areas, the average yield for the State has steadily increased. For the period 1892-1901, it was 10.02 bushels per acre; for 1902-11, 11.04; 1912-1921, 11.62; 1922-1931, 12.02; and for 1925-1935, 12.60.

The wheat growing area of New South Wales runs in a broad belt through the State, from North to South, and is determined by soil and climatic conditions.

The Coastal area is unsuitable for wheat growing for grain on account of the humidity, which causes rust to develop and destroy the crop, but in any case the land in this region can be more profitably used for dairying and the production of maize and other crops.

/Wheat .....

Wheat is not grown to any extent on the mountain and tableland country, immediately west of the Coastal area, partly because the arable lands are not extensive and partly for the reason that better returns are obtained from other crops such as oats and potatoes, and also from cows and sheep. Owing to the somewhat moist nature of the climate in this portion of the State, the comparatively small quantity of wheat grown there is not of the best quality, the grain being soft, and consequently the flour produced from it is not suitable for the manufacture of bread.

The wheat belt commences on the Western Slopes and extends out to the Western Plains and through the Riverina. The features which make this area suitable for wheat growing are the existence of extensive areas of suitable soil, the suitability of the rainfall, and the correct temperatures.

The suitability of the soil is an important factor in wheat growing and must be considered in relation to the rainfall. In the first place the suitable soil must exist over extensive areas. In view of the relatively low price which farmers receive for wheat, even under normal conditions, they must be able to cultivate a large area at a low cost.

If a wheat grower has only a small area to cultivate, the cost of production becomes prohibitive. Economic production appears only possible when a wheat grower cultivates annually at least 200 acres in the more favourable districts on the Eastern side of the wheat belt, and 350 to 400 acres on the Western side where yields are lower.

The wheat soils of New South Wales are generally of a fertile character. They are well supplied with the constituents essential to the development of the plant, with the exception that there is a lack of phosphates in the Southern soils and also to some extent in the Western soils. Those in the Northern part of the State, however, are well supplied with all the necessary plant food constituents.

In those soils where there is a deficiency of phosphates, this constituent is supplied by the application of superphosphate at the rate of 50 to 80 lb. per acre, which is sown with the seed. By this means the yield is increased by approximately 6 to 10 bushels per acre in the Southern districts, and by about 3 bushels per acre in the West.

Furthermore, the soil must be fairly easy to work, and in those districts on the Western side of the wheat belt, where the rainfall is light, it must be of such a nature that it retains moisture and yet gives it readily to the crop.

On the Eastern side, where the rainfall is fairly good, a wider range of soils is suitable for wheat. This means that the heavier soils will give profitable returns and so also may deep light soils. On the whole, however, soils of medium texture of a loamy character with a retentive subsoil are the most suitable for wheat. In the wheat belt, an extensive area of such soils exists, particularly in the South and West portions. In the

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Northern section of the wheat belt, the areas of soils of this type are less extensive owing to a greater part of the land being of a rough, hilly nature, or consisting of heavy black soils which are unsuitable for wheat.

It is estimated that the total acreage in the wheat belt is approximately 58,000,000 acres, and it is probable that about 20,000,000 acres of this are suitable for wheat production, the balance being either too steep or stony, or the soil being unsuitable. Part of the area is not likely to be used for wheat growing, as it can be more advantageously utilised for grazing, in conjunction with adjacent pasture land.

It has also to be remembered that provision must be made for the rotation of crops, and for fallowing. For example, on a farm of, say, 900 acres where the full area is suitable for wheat, the most profitable practice would be to crop 300 acres with wheat, fallow 300 acres and have the balance of 300 acres under grass or fodder crops for sheep.

On this basis, under normal circumstances, about one-third of the suitable area could be cropped, giving a total area of approximately 6,000,000 acres that could be placed under wheat annually. This is possible, however, only if wheat prices are profitable and the industry becomes more attractive from a financial standpoint than sheep raising.

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It is learned that the British Government has decided to set up a Colonial Empire Marketing Board with the object of promoting the economic welfare of the British Colonies.

Outstanding features will be (1) the appointment of marketing officers; (2) an organised system of publicity, which will include participation in exhibitions; and (3) research. The activities of the Board in its earlier stages will be directed mainly towards the initiation of systematic investigations, not confined to the United Kingdom, into the methods of marketing Colonial produce and the possibilities of improving these markets without seeking immediate direct results from market promotion and advertisement. At a later stage the principal functions of the Board will be to help and encourage the producers and distributors concerned to build up efficient marketing organisations of their own.

The duties of marketing officers will include the acquisition and utilisation of marketing information and markets statistics.

The total expenditure of the Board is expected to be approximately £52,000 per annum.

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## PURCHASES OF FRUIT BY RAILWAY REFRESHMENT ROOMS.

Interesting information has been furnished by the Railway Department relating to fruit purchased by that Department during the last few years.

The quantity and value of the main fruits bought in the period 1933 to 1936, inclusive, are set out in the following schedule:-

| FRUIT. | 1933 | | 1934 | | 1935 | | 1936 | |
|---|---|---|---|---|---|---|---|---|
| | Quantity | Value | Quantity | Value | Quantity | Value | Quantity | Value |
| | cases | £ | cases | £ | cases | £ | cases | £ |
| Apples | 13,306 | 5,045 | 13,102 | 4,983 | 15,236 | 6,355 | 13,975 | 6,846 |
| Pears | 1,614 | 624 | 1,749 | 684 | 1,293 | 540 | 1,577 | 689 |
| Bananas | 2,276 | 2,329 | 3,616 | 2,657 | 5,443 | 3,609 | 5,257 | 3,984 |
| Oranges | 54,542 | 13,234 | 55,493 | 13,372 | 24,841 | 9,036 | 29,604 | 11,191 |
| Grapes | 9,646 | 2,111 | 5,321 | 1,436 | 4,341 | 1,298 | 4,259 | 1,137 |
| Cherries | 3,556 | 750 | 4,967 | 932 | 4,812 | 874 | 4,068 | 878 |

The figures disclose that purchases of the fruits mentioned have been fairly consistent except in respect of oranges which show a marked decline during the last two years. This is attributed to reduced quantities of citrus offering due to adverse seasonal conditions. On the other hand an increase is disclosed in the case of bananas.

The totals for all fruits purchased are as follow:-

| Year | Quantity (cases) | Value £ |
|---|---|---|
| 1933 | 154,581 | 26,170 |
| 1934 | 131,588 | 26,399 |
| 1935 | 106,613 | 24,281 |
| 1936 | 113,602 | 27,600 |

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# HISTORY OF PRODUCTION AND MARKETING OF OYSTERS IN NEW SOUTH WALES.

As an article of diet, the oyster has enjoyed a popularity which dates from time immemorial. It is regarded as one of the most delicious and nutritious foods that nature has made available to man. Australia, in this regard, is singularly well provided, as, for delicacy of flavour, the Australian rock oyster probably surpasses any found in other parts of the world. Oysters formed one of the principal articles of food of the Australian aborigines long before the advent of any European adventurers and, when English colonists commenced to settle on the coast of New South Wales, they were quick to appreciate the plentiful stocks which existed in most of the estuaries. In those days it seemed that the supply was inexhaustible and the idea that artificial aids to production would ever become necessary was probably regarded as ridiculous. Due, however, to the increase in demand for oysters which was consequent upon the progress of the settlement and growth of population, natural supplies became insufficient to meet all requirements. Extensive havoc also resulted from the use of live oysters in the manufacture of lime which was, at that time, in great demand as a component of mortar for the erection of stone buildings. By 1868 the supply was so depleted that the need for artificial aids to propagation became evident. Nevertheless, it was not until 1896 that any really organised methods came into existence. From that time onward, constant improvements in culture and modes of cultivation resulted in the oyster-farming industry reaching its present-day extensive proportions.

Of the various species of oysters to be found on the Australian coast, only two are of any commercial value. These are, firstly, the rock oyster known scientifically as "Ostrea cucullata" and, secondly, the so-called mud oyster (Ostrea angasi). The former is renowned for its superior edible and keeping qualities and is much more important commercially, being more prolific and widely distributed. It occurs on practically all parts of the Australian coastline with the exception of the extreme southern portion ranging from the northern boundary of Victoria around to approximately 150 miles north of Perth. It is, however, of most commercial value on the east coast from Rockhampton on the north to the Victorian border on the south. The mud oyster is to be found on the whole of the south coast and for some distance along the east coast but is present in the greatest quantities at Port Lincoln near Adelaide. It is, therefore, sometimes referred to as the "Port Lincoln oyster". It is larger than the rock oyster but does not possess the same delicacy of flavour. Mud oysters are not marketed in New South Wales but appear in large quantities on the Melbourne and Adelaide markets. These places also import rock oysters in considerable quantities and they are much in request at prices approximately three times as great as those realised for mud oysters. As regards their respective keeping qualities, the rock oyster is far superior for it will live out of water for upwards of three weeks as compared

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with the other variety which seldom exists for more than four days after removal.

Turning now to the production side of the industry, it must be stated that this may be purely natural or may be artificially assisted. The potential natural production is enormous, as each oyster during each spawning season ejects several millions of eggs. It has been estimated, however, that probably not more than two of these ever reach the adult stage. It is in counteracting this terrific loss, that scientific cultivation is so important. The period of an oyster's life at which the greatest numbers are annihilated is the free-swimming embryonic stage. Here the cultivator is powerless to help the process of natural production on account of the minute size of the embryo. It is, however, at the close of this portion of the oyster's life that he can assist. In passing from the embryonic to the spat stage the oyster must find some clean object in the water to which it may cement its shell, or else it must perish. Although the oyster may be said to swim, it is powerless to propel itself in any specific direction as, because of its size, it is at the mercy of the currents and waves. It is the cultivator's first duty to place in the water material suitable for catching the spat in places where natural objects are not available. Having secured the oyster, the farmer can then aid production by protecting the growing bivalve from its many enemies.

Methods of commercial cultivation vary considerably, largely in accordance with the artificial material available. The best spat-catching grounds usually occur at the mouths of rivers where the water is fairly clear and salty. These conditions are not, however, favourable to speedy growth and it is necessary to remove the spat to more brackish water for maturation. It is essential that the objects used for catchment should be reasonably smooth and should last for about three years without decay. It is advisable that they be of such a nature as to permit easy detachment of the oyster when fully grown. The most favourable material under these requirements is sandstone. Where this is not available, sticks of various kinds are used, the Black Mangrove being the best. In New South Wales, cultivation is about equally divided between stones and sticks. The method of leaning two slabs of stone together on a mud flat is used mostly at Port Macquarie and the Brunswick, George's and Clyde rivers. The two slabs are fixed in the mud so as to form an inverted "V". They are later reversed, in order to catch the maximum amount of spat. Stick cultivation is much favoured at Port Stephens where it has been carried on for upwards of twenty-four years. During that time it has also been introduced to the Hawkesbury River. Mangroves abound at Port Stephens and are substituted for the ample supply of stone which, at Port Stephens, is far too hard for oyster cultivation purposes. The sticks are laid together in bundles as more spat is captured in this manner. After six or twelve months, they are removed to suitable maturing grounds. The system in use in the Manning and Bellinger rivers, where oysters are grown on deep-water beds, is to use sticks only for the catchment of spat.

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When twelve months old, the oysters are knocked off and shovelled into the water. They sink to the river bottom and are gathered by dredge when mature. Oysters take from two to three years to mature in Australian waters. In the colder waters of the northern hemisphere the time is longer and ranges from four to five years.

The outstanding feature of the marketing side of the oyster industry is the fact that only a very small percentage of the oysters produced in New South Wales is sold in the City Municipal Markets in Sydney. The portion that is disposed of through this channel is sent by rail or boat from the point of production. The oysters are marketed in standard three-bushel bags which contain about 120 dozen mature specimens. The agents sell them on consignment at prices which fluctuate according to quality, demand and the variation of supplies. The principal method of distribution in this State, however, is by direct selling. The oysters are taken by motor-lorry from the place of production to the various city and suburban shops by both producers and dealers. Considerable quantities are handled through the city of Sydney. Much is consumed in the metropolitan area but a large portion is despatched to country towns and to other States, such as Victoria, South Australia and occasionally as far west as Perth in Western Australia.

The oyster which has proved itself most suitable for present marketing requirements is that which has passed through a two-year period of maturity. These are found to be tender and more palatable than those matured for longer periods as in European waters. Regulations are in force which provide that all oysters which are immature, that is smaller than the standard set down, can be legally sold only to cultivators as "spat" to be relaid on the beds or trays to complete their development. A fairly large trade is done in bottled oysters, partly through the market but principally through the hands of wholesale dealers. Producers also sell a considerable quantity of bottled oysters on main highways and railway stations which are in close proximity to the point of production.

The perishable nature of the product more or less demands that it be sold close to the place where it was produced or, at least, by a speedy and direct method. On account of this, the possibilities of an export trade are remote as, to send oysters to any place overseas, it would be necessary to can and probably cook them. Oyster growers are, for the first time since commercial cultivation commenced, finding it difficult to cope with the increasing local demand. The scope for development is ample. With the assistance of scientific effort, the difficulties which confronted many of the pioneers of the industry have been largely overcome and a bright future appears to be in store for it.

E.J.C. & T.McK.

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## COOL STORAGE OF VEGETABLES.

The Superintendent of the City of Sydney Municipal Markets (Mr. W.J. Williams, B.Sc.) recently delivered a lecture on various aspects of the cold storage of vegetables. Although it is impracticable to publish it in detail, a number of the more salient features are set out hereunder.

Mr. Williams points out that it is not often realised how useful vegetables are in the diet of mankind. They are generally used in every two out of the three meals in the daily routine living. The value of the production of vegetables throughout Australia for last year reached a total amount of almost £6,000,000, and when it is known that the average daily quantity used by the average family is approximately 3 lbs., the great importance of the industry can be more fully understood.

Vegetables are of value because of their vitamins, minerals and indigestable residue; some contain starch and some sugar. They hold on an average more than 90 per cent. of water. There is a wonderful choice over the four seasons of the year. They add, therefore, a great variety to our food.

Is it any wonder that the growing of vegetables throughout Australia demands a vast amount of attention. Market gardening radiates from the city well into the country districts and as the land values near the city become greater so the growing of vegetables extends far into the country districts.

On account of the concentration of the population in large cities and the tendency for vegetable growing to spread, it will be found necessary in future years to use cold storage to a very great extent, so that the city might be supplied with fresh vegetables.

Cold storage can be used for most classes of vegetables and Mr. Williams has conducted experiments with various kinds, such as Asparagus, Beans, Celery, Cabbages, Cauliflowers, Cucumbers, Carrots, Lettuce, Parsnips, Peas, Rhubarb, Turnips, Tomatoes, Onions, Mushrooms and Potatoes.

In some of the colder districts in Australia, it is possible that vegetables may become frozen (it often occurs in parts of America). While it is not likely to occur to any extensive degree, still it is well to know exactly how this frost might be removed. Vegetables that are frozen for a little time can be brought back to normal conditions if placed in a temperature of 36 to 38 degrees Fah., when the frost will thaw out gradually. In ordinary temperatures vegetables are likely to become soft, so that it is essential to use a controlled temperature. There is a large Interstate trade in a great many varieties of vegetables. The produce travels many thousands of miles to meet the demands in the capitals of the different States of Australia.

/Vegetables .....

Vegetables of the type with which Mr. Williams has experimented should be packed either in boxes, bags or in crates, as he states that the market gardener is not sufficiently careful with the products of his land and it is only after he has realised the necessity for the proper protection of his goods in crates that he will obtain better prices.

It is surprising the amount of damage that takes place in the handling of the vegetables from the garden to the market, and too much stress cannot be laid on the bruising and breaking of these, two serious matters when cold storage is taken into consideration, for it is where they are broken or bruised that moulds develop. The system of crating also gives the grower the opportunity of grading which is also essential if he is to obtain the confidence of the buying public.

If we are to successfully handle and cold store vegetables, we must remember the fact that they are alive. The process of respiration is continuous and goes on just the same as in animal life. They take in oxygen and give off carbon dioxide, water and, while doing this, generate heat. They live just at the rate at which they respire and this can be retarded by the use of low temperatures.

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## THE STATISTICAL DIVISIONS OF NEW SOUTH WALES IN RELATION TO PRIMARY PRODUCTION.

The State of New South Wales may be said to fall into four main physical divisions which correspond with the terrain, viz., Coastal, Tablelands, Western Slopes of the Great Dividing Range and the Western Plains. The meteorological divisions constitute a further subdivision of the four sections referred to and coincide with the natural divisions of the State from the standpoint of climate and allied considerations. It is upon these meteorological divisions that the statistical divisions are based and with which they are practically identical.

It is the function of the Government Statistician through the collection of statistics, figuratively speaking, to take stock annually of the resources of the State and, as climatic and physical conditions are deciding factors in the types of primary industry in the various parts of the State, so statistical divisions following the general outlines of the climatic or meteorological divisions may be regarded as representative cross sections of the State's rural production. Within each Statistical division are Police Patrol Districts. The services of State Police Officers within these districts are requisitioned by the Government Statistician for the collection of detailed information

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covering such matters as the numbers of stock being carried, areas under various crops, etc., etc. This procedure is facilitated by the fact that, as in each of the other Australian States, there is only one Police Force and that one State-controlled. Each statistical division also comprises a certain number of shires, Although police patrols may extend from one shire into another and, in a few instances, may overlap into another Statistical Division, in actual practice it is found that the information relating to particular shires or Statistical Divisions may be allotted without difficulty. From these Police returns, therefore, the Statistician is able to compile information as it applies to the various shires or Statistical Divisions, which combined, form returns for the State as a whole. It will readily be appreciated that the Statistical Divisions form useful units for recording production in the various primary industries. It is only by the collection of figures within definitely defined boundaries that one is able to make a comparison of such figures from year to year and thereby gain a true perspective of the position of the State's resources.

The State Marketing Bureau, among the many duties and functions allotted to it under the Marketing of Primary Products Act, is required to publish from time to time forecasts of primary production. For such forecasts it is necessary, in the first instance, to have a knowledge of the acreages under crop, the number of bearing trees and information of a similar character, and the Bureau regularly has recourse to the records of the Government Statistician for that data. In such circumstances and for the sake of uniformity and to facilitate interchange of information, the statistical divisions used by the Bureau of Statistics were adopted by the State Marketing Bureau.

In this article the four main physical divisions are broadly reviewed. The fifteen divisions into which these are divided will be the subject of individual articles in subsequent issues.

The Coastal division, extending from the Victorian border in the South to that of Queensland in the North, has a total length of about 700 miles. The average width of this Coastal belt is about 50 miles in the North and 20 miles in the South, the widest part (150 miles) being in the Hunter River Valley where the Great Dividing Range bears to the West. The land is undulating and traversed by numerous rivers. This division, which is blessed with adequate rainfall and a substantial area of rich soils, is considered one of the most productive regions of the State, if not of the whole Commonwealth. A considerable area from North to South is well adapted for and largely given over to dairying.

The warm, moist, sub-tropical climate of the Northern section of the Coastal division also favours the production of maize, bananas, sugar-cane, pineapples and various other crops.

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The production of tomatoes on the North Coast has assumed considerable dimensions during comparatively recent years, growers being able to forward their produce to metropolitan markets very early in the season, thus reaping price advantages. Harking back to the dairying industry, it should not be overlooked that pig raising for both pork and bacon is by no means an unimportant adjunct in Coastal districts. The Hunter River Valley is also the scene of a fairly large volume of cattle raising while sheep grazing is carried on in the more inland portions of the district. In this Valley, too, lucerne and wine-growing are important. The citrus production of the Gosford-Wyong-Hornsby-Parramatta districts is an interesting feature of primary production in the middle section of the Coastal division.

The activities of the rural population within easy distance of the City of Sydney are largely governed by the needs of the extensive metropolitan market. Dairying is carried on in such centres as Windsor, Richmond and Camden for the supply of raw milk to the City dwellers. In addition, fruit-growing, market-gardening and poultry-farming are extensively engaged in. Dairying is the main primary industry of the South Coast and, although butter is the main product, large quantities of cheese are also produced. Additional to dairying, maize, fruit, vegetable and potato growing figure in the primary production of the South Coast of New South Wales.

The Coastal belt is bounded on the West by the Great Dividing Range, the name given to a continuous chain of highlands stretching along the whole of the Eastern part of the Continent. Except for a Western bend skirting the valley of the Hunter, it runs for the most part parallel to the coastline. Immediately westward of the Great Dividing Range are the Tableland Divisions. Because of the nature of the country comprising these divisions they are extensively given over to pastoral pursuits but the soil is also tilled to a considerable extent, various kinds of cereals, root crops and fruit being grown. On the Northern Tableland, which is customarily referred to as the New England, large numbers of cattle are raised, more particularly along the Eastern escarpments, and sheep grazing is very extensive, climatic and other conditions favouring the finer-woolled merinos. Potatoes and pome and stone fruits are given considerable attention, whilst maize, oats and a little wheat are also produced. Sheep raising is the principal activity on the Central Tableland but wheat-growing is also important. Potato-growing is extensive, particularly around Millthorpe and Crookwell and district where many growers are engaged in the production of certified seed. Fruit and vegetable growing is fairly extensive, noticeably in the Bathurst and Orange districts, while other crops include maize and oats, of which fair quantities are marketed. The Southern Tableland is almost exclusively given over to wool-growing, relatively little land suitable for cultivation being available. Production of pome fruits is undertaken on an appreciable scale and a section of the Central Tableland potato-producing district extends into this division.

/The....

The Western Slopes Divisions, as the name indicates, comprise undulating lands on the western side of the Tablelands Divisions, gradually sloping to the plains country still further west. These areas, which are watered by the upper reaches of the inland rivers, usually receive regular and sufficient rainfall and may be deemed to be the most fertile regions of the interior. The North Western Slope extends from the Queensland border on the north to the Warrumbungle Mountains. This area is chiefly given over to sheep and wheat although cattle raising is a fairly important activity. A certain amount of maize, barley and broom millet is also grown.

The Central Western Slopes comprise a considerable extent of good agricultural land and many holdings have a portion under wheat, sheep being run on the balance. A number of districts is suitable for fat lamb raising and this phase receives a good deal of attention, crossbreds being the most favoured. The South Western Slope is another area of rich, well-watered land and are also largely given over to wheat and sheep, as in the Central Western Slopes Division. Fruit-growing is by no means unimportant, one of the main prune and cherry-growing districts of the State being located at Young. Pome fruits and potatoes are grown, noticeably around Batlow. Oats fill a fairly prominent place as a secondary crop in the Slopes Divisions.

The Plains of the Central Division and Riverina comprise the great sheep districts of the State and, as well, produce almost half of the wheat. They constitute the eastern section of a vast extent of practically level country which stretches from the western edge of the Slopes to the western boundary of New South Wales and have an average width of about 120 miles. Viewed generally they are not well watered and rainfall is low; large areas, however, have tapped subterranean supplies by means of artesian bores. The lower parts of the western rivers traverse these plains but they do not supply water to a very substantial area because of their fewness and irregular flow. The North Central Plain is almost entirely devoted to sheep, the production of wheat and oats being of relatively small importance. Wheat growing and sheep raising are the outstanding primary industries on the Central Plain, comparatively smaller quantities of oats being also grown. The "safer" districts are towards the eastern fringe. The large areas of fertile soil associated with the fact that the rains normally occur during the winter and spring months make the Riverina the most important district in the State from a wheat-producing standpoint. It has been estimated that more than one-quarter of the total yield in New South Wales during season 1936/37 was produced in this division. In addition, sheep-grazing is carried out extensively, and on the Murrumbidgee Irrigation Area, which is located within the Riverina, rice, oats, grapes, citrus, pome and stone fruits are important crops. Dairying and fat lamb raising also receive considerable attention. The plains of the Western Division, which comprises two-fifths of the total area of the State, boasts sheep-grazing as its only really important primary industry, chiefly owing to the low rainfall.

/New South Wales...

New South Wales is far ahead of the other States of Australia in the production of wheat and wool, which form the backbone of Australia's national wealth. This State is also well ahead in the production of coal, silver lead ore, zinc and zinc concentrates, and shares first place with Victoria in the matter of butter output.

As previously indicated herein, it is proposed to devote space in later issues of this publication to a detailed description of each of the Statistical Divisions of the State and the nature, extent, etc., of the various primary producing activities carried on therein.

----oooOooo----

The following interesting figures relative to the value of Australian production and exports, according to industry, during the ten year period ended June, 1936, have been supplied by the Commonwealth Bureau of Census and Statistics:-

| Industrial Group | Value of Production during ten years | Percentage on Total Production | Value of Exports during ten years | Percentage on Total Exports | Percentage exported of the Production in each Industrial Group. |
|---|---|---|---|---|---|
| | £A.1,000 | % | £A.1,000 | % | % |
| Agriculture .. | 784,429 | 20.65 | 281,680 | 24.40 | 35.91 |
| Pastoral .. | 894,911 | 23.56 | 605,202 | 52.43 | 67.63 |
| Dairy and Farmyard | 454,125 | 11.95 | 99,120 | 8.59 | 21.83 |
| Mining .. | 189,506 | 4.99 | 111,082 | 9.62 | 58.62 |
| Forestry and Fisheries | 144,490 | 2.75 | 13,791 | 1.19 | 13.20 |
| Total Primary Produce: | 2,427,461 | 63.90 | 1,110,875 | 96.23 | 45.76 |
| Manufactures .. | 1,371,292 | 36.10 | 43,490 | 3.77 | 3.17 |
| TOTAL: | 3,798,753 | 100.00 | 1,154,365 | 100.00 | 30.39 |

----oooOooo----

# MARKETING OF CANNED AND PREPARED FOODSTUFFS IN THE UNITED KINGDOM.

In response to inquiries made by the Department of Agriculture, a communication has been received from Mr. A.E.Heath, the New South Wales Agent-General in London, with regard to the marketing of canned and prepared foodstuffs in the United Kingdom. From the Australian point of view, the best prospects appear to be in the export of canned tomato products, for which there seems to be a large and expanding market in Great Britain. Mr. Heath states that the peak of such trade was reached in 1935 when imports totalled 954,000 cwts., but in the following year imports declined to 537,000 cwts., due to greatly reduced export by the two leading supplying countries, viz., Italy and Spain. During 1936, imports into Great Britain of tomatoes preserved in airtight containers receded by 264,760 cwts. from Italy and 151,453 cwts. from Spain in comparison with the previous year. It may be particularly noteworthy that Canada's export of similar commodities to Great Britain between 1932 and 1936 increased by approximately 130,000 cwt.

The British trade in canned tomatoes has always been dominated by Italy and Spain which together normally supply from 75 to 80 per cent. of such imports; the former country is the main source of supply. At the present time, however, Italy is sending considerably reduced quantities of canned tomatoes to Great Britain, whilst Spain has practically ceased export to this market, but the diminished imports from Spain and Italy have not been made good by the larger quantities coming forward from Canada. The future trend of marketing of canned tomatoes in the United Kingdom will thus depend largely, if not entirely, upon Italy and Spain and when these countries may be able to resume their former trade in these products. After examination of the chief factors governing the sale of canned tomatoes in this country, such as demand, prices, scarcity of supplies, duty preference of 10% for Empire products, and having regard to Australia's favourable monetary exchange position, it would seem that it might be now opportune for Australia to capture a portion of the British trade lost during the last year or two by Spain and Italy in canned tomatoes, and it is recommended that early trial shipments, comprising the most popular sizes, i.e., No.3 and No.2½ tins, should be made with a view to testing marketing prospects.

With regard to other tomato products, such as puree, pulp, catchup, sauces, juice and soup, it is understood that the turnover in these is not as great as with canned tomatoes, and that demand is governed by standard or grade of manufacture, variety and type of product offered for sale. The fact, however, that Canada supplies this country with considerable quantities of such products competitively with foreign countries more advantageously situated, is evidence that a lucrative trade for such exists in Great Britain

/and....

and there seems to be no reason why this should not be extended to include similar Australian products.

The British trade in canned mushrooms is small, and limited to the French button type, for sale to the hotel and restaurant trade. From particulars regarding existing prices for this type supplied it will be possible to estimate whether it may be practicable to market similar Australian products here economically, should supplies of such become available for export.

It would appear that the trade in this country for tinned asparagus is not greatly in excess of 30,000 cwts., the bulk of which is supplied by the United States of America. Comparatively small quantities of this product are imported here from Belgium, France and Canada, and also produced locally in England, but details of such quantities are not obtainable. Although somewhat differing views have been expressed by the several firms approached, it is clear that a definite limited market offering scope for development exists in Great Britain for various types and different sized packages of tinned asparagus and experimental shipments of Australian asparagus might be sent, to test the marketing prospects in this country, if and when any surplus exists. The picnic size, i.e., a round tin, containing 10½ ozs. of green grade tips, is greatest in demand here at the present time, and might, therefore, offer the best prospects.

With regard to other varieties of tinned vegetables, Mr. Heath goes on to say that, as production on a large scale of such is carried on locally in England, both for home consumption and export, it may be safely assumed that it will not be practicable to export these commodities from Australia economically, in competition with English packed commodities.

It is apparent that some attempt is being made by interested parties in Australia to test the possibilities of the United Kingdom market in canned goods of the nature referred to in the foregoing. It is understood that 5,000 cases of Australian Pack Tomato Puree recently arrived in London and were accepted by large importers of the product as being suitable for the market. This firm anticipates that the trade in tomato puree can be developed.

----oooOooo----

Some months ago an advertising campaign was started on behalf of the Western Growers' Protective Association (Los Angeles) to increase lettuce sales in the four major markets of the U.S.A. About 90% of the lettuce growers of California and Arizona contributed towards expenses and approximately £40,000 is being spent on newspaper advertising radio and dealer service. Results have been so satisfactory that a £10,000 campaign is already under way for melons, and something similar for carrots is planned for next year.

----oooOooo----

## INCREASED NUMBERS OF LAMBS YARDED AT HOMEBUSH, SYDNEY, BUT CATTLE SUPPLIES FALL OFF.

A definite upward movement in the numbers of sheep and lambs yarded at Homebush occurred during September, 29,000 head more coming forward than during the previous month. The total number available was 263,097 head and, while there was a falling-off in grown sheep yarded, particularly towards the close of the month, suckers and lambs showed a steady increase in numbers, rising from 8,300 head on one particular day early in the month to an offering of 23,500 during the last sale day of the period. Grown sheep, however, were scarce, particularly towards the end of the month.

Conditions in many of the sheep raising districts of New South Wales are far from satisfactory, lack of rain and the hot dry winds experienced causing feed supplies to deteriorate. As a result, there is a scarcity of really prime sheep.

The numbers of full-woolled sheep coming forward are now considerably smaller, but increased supplies of shorn descriptions were yarded throughout the month. Although consignments of really good trade and export lines were usually not sufficient for buyers' requirements, some sheep were available which were of good shape and in particularly nice condition; as is usual on markets rather bare of this class of mutton, excellent prices were obtained. Speaking generally, yardings could be said to comprise chiefly fair to good trade sheep with the usual proportion of plain sorts, and a relatively light supply of prime grade.

The suckers yarded included quite a number of dry and wasty descriptions; this would apply particularly to the earlier part of the month, when comparatively few were available. As supplies increased, a definite improvement in quality was noticed, the pennings including a much higher percentage of good export lambs. Several consignments of lambs of very attractive appearance and condition were received and met with a strong demand, chiefly from exporters, and in each instance they topped the market in price realisations.

Although values reached high levels last month, they were exceeded during the early part of September, wethers being disposed of at 42/-, ewes at 39/- and lambs up to 35/- per head, representing the highest rates for some considerable time. Apart from these early sales, values for all grades of mutton receded, the fall being from ½d to 1d per lb. spread over the greater part of the period. Owing to a relatively small yarding of sheep on the last sale held during the month, values for mutton rose sharply and practically regained the fall previously sustained, best wether mutton costing 4¾d and best ewe mutton 4¼d per lb. on the hoof; these rates were only ¼d per lb. lower than those ruling early in September.

During the early part of the month, when comparatively light supplies of suckers and old lambs were offered, prices were consistently high, suckers costing up to 8d per lb. and old lambs

/to 7d. ...

to 7d. As the number available on each sale day increased, the cost for all grades was lower, the fall being gradual and extending over most of the month, rates during closing sales being 6¾d for suckers and 5¾d per lb. for old lambs, a fall of 1¼d per lb. for both classes.

Full-woolled sheep were relatively cheaper throughout than the shorn descriptions, owing to the fall in skin values, the skin market declining on several occasions.

The high prices ruling at the Homebush Saleyards for mutton and lamb on the hoof have been responsible for an increase in wholesale meat prices which, when passed on to the public, have resulted in a falling-off in meat consumption.

The industrial dispute involving beef slaughtermen at the Abattoirs caused quite an upset in the cattle market early in September. Agents were left with upwards of 3,000 head of cattle on their hands and little prospect of profitably disposing of them. Fortunately, however, a sale was held on Monday 6th and from then on further dislocation was avoided.

As might be expected in such circumstances, there was a substantial falling-off in the number of cattle yarded, 24,000 head coming forward; normally this total might easily have been exceeded by from four to six thousand. Store stock accounted for slightly over 1,500 of the total offering. A decrease in Queensland consignments was apparent, about 500 head being included.

The fairly promising conditions in regard to feed early in the period were not maintained in many districts. Hot, dry winds and insufficient rains have caused considerable damage to pastures in many instances and also resulted in diminishing water supplies. It seems likely that good quality cattle will be even scarcer at Homebush if relief is not soon obtained.

Decided contrasts in the quality of the cattle sold during the month were noticed. At one sale there was not more than an odd pen of prime description available. At other times, however, really prime cattle were available; a line of Hereford steers comes to mind, while Devon cattle, represented in larger numbers than usual, made a rather good showing.

The high rates realised towards the end of August were not fully maintained in the first half of the period under review, all classes of beef being easier to cheaper for a time. Subsequent sale days, however, saw a distinct improvement despite the numbers of plain cattle offered. Competition became increasingly active, values towards the close being as high as those ruling at the end of last month. The fluctuations were far more apparent in respect of plain and medium quality lines, although good cow beef at one stage fell rather abruptly in value.

Bullocks and steers as usual comprised the bulk of the offerings, though steers of quality were often very scarce. Perhaps the best draft was disposed of about the middle of the month, on a weak market. The steers were an even lot estimated to "dress"

/480 lb. ....

480 lb. of beef and worth 40/- per 100 lb. on the hoof. Some rather attractive consignments of heavy bullocks were yarded and for the most part they realised very satisfactory rates.

Cows and heifers made up a big proportion of the supply throughout the period and, although this class of beef was subject to considerable fluctuation, rates generally were better than expected. Heifers were in demand and, if good, the highest rates were equivalent to 37/- and 38/- per 100 lb. dressed weight.

Occasional lots of attractive vealers and yearlings were yarded, a fair sprinkling of suitable trade descriptions being available. Judging by the demand, it seems that the trade could easily absorb far more of this class of beef than is at present coming forward. The rates obtained were unusually high, particularly towards the end of the month, many lots being worth over 46/- per 100 lb.

----oooOooo----

The bulk of the preliminary work in connection with the forthcoming poll for the election of producers' representatives to the Egg Marketing Board, which is to be taken on Friday, 29th October, 1937, has been completed.

The Minister for Agriculture (Hon. Hugh Main, M.L.A.) has received the following nominations from candidates desirous of contesting the election:-

No. 1 Electoral District.

Crooke, Alfred George.
French, Frederick Owen.
Nelson, Harry Rothery.

No. 2 Electoral District.

Bruce, William Hamilton.
Judson, Noel Frederick.
Mitchell, John.
Wheatley, Arthur Randolph.
Whitelaw, Robin Snr.
Williams, William Irving.

No. 3 Electoral District.

Blake, Richard Charles.
Duncan, Hugh Alexander.
Moulang, Frank.
Tegel, Julius Edward.

Ballot papers will be posted to enrolled producers on Wednesday, 20th October, 1937.

----oooOooo----

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

The position regarding potato clearances during September was even worse than that prevailing during the previous month. Tasmanian supplies, which amounted to 83,345 bags, were well outside the requirements of the trade. The warmer weather, also, resulted in a considerable slackening in demand and agents experienced some difficulty in disposing of stocks. Generally, rates were lower by 10/- per ton. Brownells were quoted at £5.0.0 to £6.0.0 and, being of good quality, were more in request than were the other varieties which sold at the following prices:- Bismarcks £4.0.0 to £4.10.0; Snowflakes £4.0.0 to £5.0.0 and Arranchiefs £3.10.0 to £4.10.0 per ton. The lowest rates mentioned in the foregoing range of prices ruled for the last three weeks of the month. Inquiry for the 10,728 bags of local potatoes railed to Alexandria was also very dull. Values obtained at auction were as follow:- No. 1 Grade £2.8.4 to £5.6.8; No. 2 Grade £2.0.0 to £2.15.0; Seed £2.1.8 to £2.5.0 per ton. As was the case in Sussex Street, the highest rates were obtained at the beginning of the month, the market collapsing completely towards the close. The quality of the offering was, however, well up to late standards. Moderate quantities of local new potatoes arrived from the Northern Rivers both by rail and sea. It is, however, too early in the season to expect any appreciable supplies from this source. Rapid clearances of the limited offering took place at £6.10.0 to £12.0.0 for No. 1 Grade and £4.11.8 to £10.0.0 per ton for No. 2 Grade.

Shipments of Victorian brown onions amounted to less than 7,000 bags. This quantity, being smaller than that received in August, was insufficient for trade requirements. The carry-over from week to week which was customary during the early part of the year was non-existent during September and each shipment moved out rapidly on arrival. Rates generally were firmer and ranged from £13.10.0 to £14.10.0 per ton. Brown picklers were also scarce and realised £17.0.0 per ton. Thirty-four cases of new season's Victorian white onions were on offer and although of poor quality they sold readily at £20.0.0 per ton. Rail consignments of Victorian brown onions, amounting to 390 bags, met a good inquiry at £13.10.0 per ton.

A practically unchanged market ruled for the 76 trucks of pumpkins railed to Alexandria. By far the greater part of the receivals was from Queensland districts and the quality was most satisfactory. The easier demand for potatoes was reflected slightly in that for pumpkins but, taken generally, the market was well maintained. Sales were effected at £4.0.0 to £7.0.0 per ton according to the standard of quality.

/Inquiry....

Inquiry for Tasmanian swedes, carrots and parsnips was adversely affected by the large supplies of potatoes. Agents reported that the quality of these vegetables was falling-off. Stocks of swedes, amounting to about 2,000 bags, were less than half those of August yet prices were easier at £3.0.0 to £5.0.0 per ton. Carrots (2,291 bags) on the other hand, met with a satisfactory request at £5.0.0 to £7.0.0 per ton. Supplies of parsnips moved out quietly at £5.0.0 to £7.0.0 per ton. Clearances were difficult to effect each week and on one or two occasions portion of the supplies was carried over.

The brisk demand for forage which was so much in evidence during July and August did not continue during the period under review. Despite the fact that supplies were lighter for the most part agents had difficulty in maintaining a satisfactory volume of sales. Rail stocks of oaten chaff were a little heavier, but only 2,500 bags arrived from Tasmania. Values showed a general decline of 10/- per ton. At Alexandria, sales of medium lots were made at prices ranging from £4.10.0 to £6.10.0 per ton with choice at £6.15.0 to £7.15.0, while £5.0.0 to £7.0.0 was obtained in Sussex Street. Quite a large percentage of the wheaten chaff on offer was of medium standard only and disposals were quiet at £4.0.0 to £5.15.0 per ton. A moderate selection of choice, however, sold at from £6.0.0 to £7.0.0. These values represent a general depreciation of £1.0.0 per ton.

Supplies of lucerne chaff at Alexandria, amounting to 66 trucks, were much lighter. Clearances early in the month, however, were restricted by large carry-overs of medium quality chaff on the ground which were slow to move. Later in the period, when this situation eased, a quiet tone continued to rule and stocks were found to be in excess of trade requirements. Quotations were as follow:- Medium £4.5.0 to £6.5.0, Choice £6.10.0 to £8.0.0 per ton. The slackness in inquiry for lucerne chaff probably resulted from the consistently large offerings of lucerne hay available during the month. By far the greater proportion of consignments was from the Maitland district. These immature stocks continued to clear steadily although periodically they were too great for buyer's needs. Realisations ranged from £2.10.0 to £5.15.0 per ton according to quality. The standard of receivals from other centres also showed considerable variation and sales accordingly were effected at values ranging from £4.10.0 to £8.0.0 per ton. Much larger supplies were forthcoming from the Hunter River during September. The 962 bales on offer in Sussex Street were of soft green quality but met with an excellent demand at £2.0.0 to £4.10.0 per ton.

Sales of oaten hay improved considerably. Although shipments from Victoria on offer in Sussex Street were much more extensive, better inquiry resulted in agents being able to effect good clearances at the unchanged rate of £9.10.0 per ton. Demand for the 32 trucks of local oaten hay at Alexandria was also very firm at £8.10.0 to £9.10.0 per ton.

/Most....

Most of the 35 trucks of straw railed to Alexandria during September was from Victoria. Generally speaking, quality was of a fairly good standard and prices accordingly were high at £5.10.0 per ton. A few inferior lines, however, were sold at as low as £4.5.0. per ton. In Sussex Street much heavier shipments from Tasmania resulted in a decrease of £1.0.0 per ton. The 9,225 bales received were more than sufficient for trade requirements and consequently moved out slowly at £4.5.0 to £4.15.0 per ton. One shipment of choice Victorian straw amounting to 400 bales was available early in the month and realised £5.5.0 per ton.

An easier market again ruled for local wheat at Alexandria. The general quality of the offerings, which aggregated 62 trucks, was not comparable with the standard set during August. A considerable quantity of inferior grain was received and was much sought after by poultry-farmers at prices ranging from 3/- to 4/11½d per bushel. Inquiry for choice lines was also satisfactory at 5/- to 5/7½d.

Supplies of maize on the Sydney market were much lighter. The country demand, which had been a mainstay of trading in previous months, was not forthcoming during the period and prices suffered a decrease. Shipments to Sussex Street from the Northern Rivers, totalling 3,655 bags cleared steadily at 5/- per bushel for yellow and 4/9 to 5/6 for white. The 32 trucks at rail also sold satisfactorily at 5/- to 5/4 for yellow and 5/6 per bushel for white. Due to the advancement of the season, stocks are now comprised of fully matured grain.

Small quantities of Tasmanian oats were shipped to Sydney during the period but were taken for milling purposes and consequently not offered to buyers. At rail, however, 13 trucks of medium quality were available. These realised from 3/1½d to 3/7 per bushel at auction.

----oooOooo----

In a recent publication issued by the Department of Agriculture, Scotland, interesting figures relating to livestock and poultry in Great Britain are published.

The numbers of livestock are taken, as on the 4th June, 1937, and disclose that horses totalled 1,004,900, cattle 7,908,000, sheep 24,686,300 and pigs 3,874,300 head. In regard to poultry, the total is shown at 63,733,700, which includes fowls 59,855,000, the balance comprising turkeys, ducks and geese.

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

During September, shipments of apples aggregating approximately 100,000 cases were received on the Sydney market from Tasmania; in addition to these, fairly large consignments came forward from Victoria. Increased quantities, consisting chiefly of Granny Smiths, were also released from New South Wales cool stores. Demand was somewhat disappointing during the early part of the month, but subsequently selected sizes of choice, coloured varieties met a better inquiry which resulted in a hardening of values, and in some instances an improvement of 6d to 1/- per case.

There was a steady request for choice, local Granny Smiths throughout the month and up to 10/- per case was obtained for the best sizes. Much of this variety, however, showed signs of scald a short time after its release from cool stores which necessitated quick sales at lower rates. Yellow fruit was not popular with buyers and was cleared, therefore, at considerably lower prices than those realised for firm green descriptions.

New South Wales grown Delicious, which were available in only moderate quantities, were in request, and special grades of large size realised to 15/- a case, with some extra choice higher. A proportion of the supplies was not of the best quality, however, and had to be marked down in grade and disposed of at lower rates. A large percentage of the Tasmanian shipments consisted of Sturmer Pippins and French Crabs of rather inferior quality. Choice, green French Crabs of large size cleared fairly satisfactorily, as also did choice Sturmers of about 2¾ inch grade. Small to inferior fruit, however, was practically unsaleable and stocks accumulated. This was offered by agents at low prices in an endeavour to clear stocks and a considerable quantity was sold to factories at nominal prices.

The greater proportion of the moderate supplies of pears was drawn from Victoria and consisted for the most part of Packham's Triumph, Josephine and Winter Nelis. Choice lines moved out freely at very satisfactory prices, Packham's realising in some instances to 15/- a case; other than choice, however, were found to be rather slow of sale.

Only limited quantities of Navel oranges came forward from Coastal districts but heavy consignments were received from the Irrigation Area. However, as these contained a greater proportion of the popular sizes than was the case last month, stocks moved out more freely at 5/- to 9/- per case, with extra choice lines at higher rates. Much of the lower grade fruit showed signs of over-maturity and showed a considerable amount of waste if not cleared within a reasonable time.

/Valencias .....

Valencias made their appearance on the market during the month. Supplies during the first three weeks were somewhat limited, which to a large extent was probably due to the fairly extensive exports to Canada. Considerably increased quantities, however, were available at the end of September. Early sales were rather slow owing to the competition of the sweeter Navels, but when more regular supplies were available and the sugar content had improved there was a steady demand for choice lots at 5/- to 7/- per case.

The market was dull for lemons throughout, demand being restricted chiefly to choice, medium-sized fruit. Much of the inferior descriptions was slow to clear and at times practically unsaleable.

Plentiful supplies of mandarins were at first available, particularly small fruit which was rather difficult to dispose of, demand then being for large sizes with tight skin and good juice content. Supplies gradually decreased and quality descriptions were sought after, the small fruit meeting with more ready sale. Special grades realised to 12/- a case.

Grapefruit were well supplied but only a relatively small percentage was of special grade. There was little inquiry for small to inferior lots, but choice lines cleared fairly well at 6/- to 9/-, while extra choice realised to 12/- a case.

Arrivals of bananas for the month aggregated approximately 30,600 cases. Of this number, 22,589 came from New South Wales districts and about 8,000 from Queensland. The high prices ruling during the early part of the month had a somewhat retarding effect on sales and as supplies increased agents found it more difficult to maintain values. Towards the end of the month considerable quantities of ripe fruit were on hand which had to be cleared at prices much below those ruling for firm, coloured descriptions. Rates for choice showed a decline of about 1/- to 2/- a case over the period.

Fairly heavy supplies of pineapples came forward from Queensland, the total being in the vicinity of 18,000 cases. A steady demand, however, was maintained throughout and prices remained fairly steady at 7/- to 10/- with an improvement of 1/- per tropical case during the last week.

According to a report issued by the Committee of Direction of Fruit Marketing, supplies of Queensland strawberries for the week ended the 4th October were the heaviest on record for 15 years. During this period, 3,536 trays and 885 cases (containing 20 packages or cheap boxes each) were placed on the Sydney market. From then on, however, consignments began to fall off and at the end of the month it was evident that the season was nearing its end. The quality generally was rather poor; the colour was good but the fruit was rather badly affected by mould and was very wasty.

/Demand ....

Demand was fair but not sufficient to clear stocks during the peak period when prices fell to 2/- to 4/- per tray and 4/- to 10/- per dozen packages. Subsequently, however, an improvement was experienced and trays realised to 6/- each, and packages 6/- to 14/- per dozen. Local strawberries made their appearance on the market. At first they were rather slow of sale in competition with the better coloured descriptions from Queensland, but by the end of the month quality had considerably improved and from 6/- to 12/- per dozen punnets was obtained with some extra choice at higher rates.

Passionfruit for the most part were moderately supplied. Prices fluctuated within narrow margins but generally were satisfactory for choice descriptions, ranging from 8/- to 11/- per half-case.

Peas were heavily stocked throughout the month, daily supplies varying from 1,000 to 2,000 bags. A considerable percentage was of only medium quality and was rather difficult to clear. Prices generally showed a downward trend, falling from 5/- to 8/- at the beginning to 3/6 to 5/- per bushel at the close of September.

Heavy consignments of beans were received from Queensland and the North Coast; only a relatively small proportion was choice, the quality for the most part being only medium. There was a steady demand for quality lines, but medium and inferior lots were difficult to sell. Choice realised to 9/- per bushel at the beginning of the month, but subsequently declined to relatively low levels, particularly during the third week when exceptionally heavy consignments came to hand. The collapse of the market was brought about by the lack of quality of the product rather than the quantity, as moderate supplies of choice locals (from the Gosford-Tuggerah Lakes districts) cleared readily at 8/- to 10/-, with some sales to 12/- per bushel, while North Coast and Queensland consignments were difficult to clear at low prices. Values of locals were maintained at these levels.

Of the estimated total of 64,000 half-cases of tomatoes which arrived on the Sydney market during the month from Interstate sources, approximately 50,000 came from Queensland and the balance from Western Australia. In addition, steadily increasing supplies were received from local glasshouses and hothouses. There was a steady demand for quality descriptions and, while prices fluctuated slightly, a gradual upward trend was apparent for Queensland and local supplies. At the end of the month the market was particularly bright, stocks clearing readily at considerably advanced rates; first grade local hothouse realised as high as 27/-, glasshouse to 23/- and Queensland to 14/- per half-case. Western Australian consignments were not popular with buyers and were rather slow of sale in competition with the better quality descriptions from Queensland.

----oooOooo----

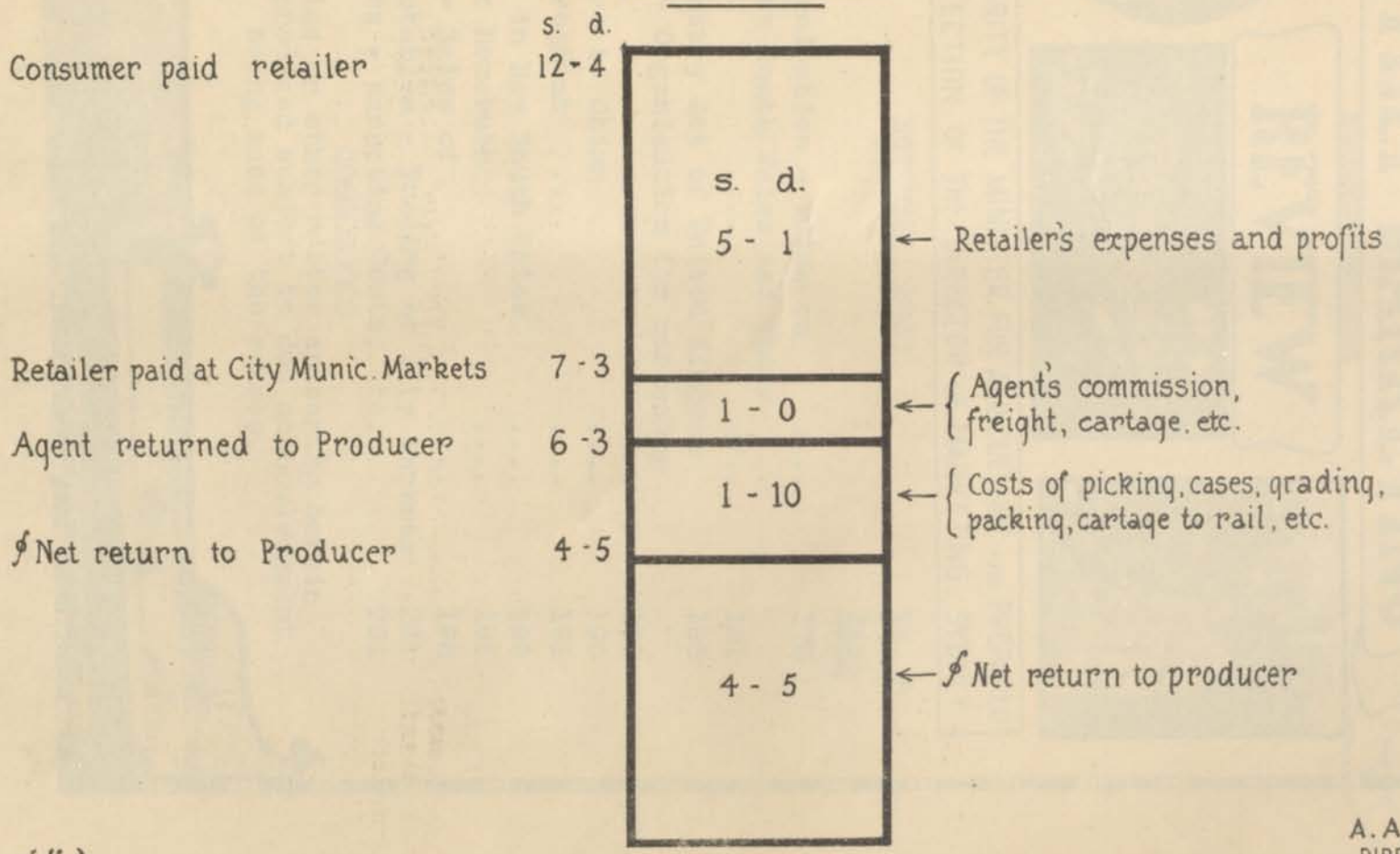
STATE MARKETING BUREAU - DEPT OF AGRICULTURE N.S.W.

G.1

# TABLE GRAPES (Black Muscat - Choice)

"SPREAD" BETWEEN THE RETURN TO THE PRODUCER
AND THE PRICE PAID BY THE CONSUMER
SEASON - JANUARY TO APRIL 1937

Per ½ bushel case




Compiled - J.H
Drawn - J.H } 30-9-37
Checked - C.K.

ƒ Costs of production should be deducted from this return.

A. A. WATSON
DIRECTOR OF MARKETING

G.1