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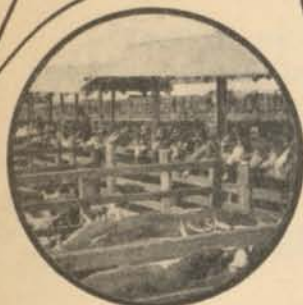
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# MONTHLY MARKETING

## REVIEW



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

Vol. 1

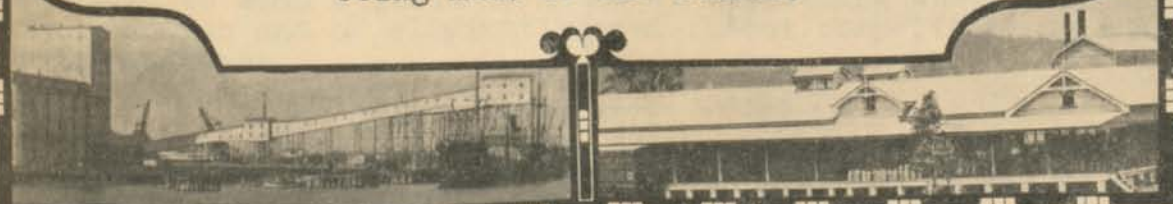
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MONTHLY MARKETING REVIEW.

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.

III.

For the purposes of these Notes, the constitutional aspect of State marketing legislation presents no particular difficulties of statement. Prior to the federation of the Australian colonies in the year 1901, each colony was entitled to exercise legislative control with reference to both its internal and external trade. The advent of Federation effected substantial changes in the legislative powers of the colonies or, as they then became, States, with reference to their external trade. Section 92 of the Federal Constitution provided (inter alia) that "trade between the States shall be absolutely free"; hence it was no longer lawful for the erstwhile colonies to limit or regulate interstate trade by the imposition of tariff duties. Moreover, in terms of Section 51 of that Constitution, legislative authority with respect to trade and commerce with other countries passed to the Federal Parliament. With reference, however, to their internal trade, the legislative powers of the States were substantially unaltered by the advent of Federation. That is to say, that among the sovereign powers which the States did not surrender to the Commonwealth of Australia was that of regulating trade in their own products within their own borders. It has recently been asserted, also, that the States retained power to regulate trade within their own borders in the products of other States of the Commonwealth. It is not germane to the present purpose of these notes to discuss that phase of the situation, more than to mention that whilst exercise of so important a power would necessarily be subject to the provision already mentioned that "trade between the States shall be absolutely free", it could be made a valuable means of completing State marketing organisation and of eliminating cut-throat competition on interstate markets.

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It remains to add (for the purposes of these notes) that the State marketing legislation and the State Marketing Boards referred to in the September issue of this "Review" are based

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upon the legislative power to control their own internal trade which the States possess under their respective constitutions and which (it should be added for greater clarity) the Commonwealth of Australia Constitution Act does not confer upon the Federal Parliament.

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The question may be asked whether any particular difficulty arises in so wording State marketing Acts that no encroachment, implied or actual, upon Federal powers takes place. Perusal of the said Acts will show that each contains special provision aimed at the prevention of any conflict with Federal powers or Federal legislation. Under the New South Wales Act a State Marketing Board may be either State-wide in its operation, or it may be constituted in respect of part of the State only. In either case, in addition to controlling the marketing of the commodity it represents in the area for which it is constituted, it may engage in interstate or overseas trade, in the latter case observing the requirements of any Federal legislation which may exist as to grading, containers, or the like. In point of fact, the Rice Marketing Board of New South Wales has an extensive interstate trade and the Egg Marketing Board in respect of the Counties of Cumberland and Northumberland and the Shires of Nattai and Wollondilly in New South Wales is the largest individual overseas exporter of eggs in the Commonwealth of Australia.

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Prior to the Privy Council decision in the case James v. Commonwealth of Australia, it was held, by reason of decisions of the High Court of Australia, that Section 92 of the Federal Constitution - that which declares that "trade between the States shall be absolutely free" - banned the States, but not the Commonwealth. The Privy Council decided that the provisions of Section 92 bound both the Commonwealth and the States and this interpretation led to a decision by the Commonwealth Parliament to seek authority by referendum for the amendment of Section 92 in order to restore the position as it had been deemed to exist prior to the Privy Council decision. The referendum was taken on 6th March, 1937, and resulted in defeat of the proposed amendment of Section 92. The position is, therefore, (a) that Section 92 binds both Commonwealth and States, (b) that Commonwealth Marketing Boards, or Marketing Boards authorised to control the marketing of a given product or commodity throughout Australia cannot be created, (c) that the States, having the power to constitute State Marketing Boards, are alone entitled to establish such instrumentalities in Australia, and (d) that Australian-wide marketing control can only be secured by co-operation between State Marketing Boards, or as the result of co-operation between such other competent bodies as may exist in the respective States.

(To be continued)

A.A.W.

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THE SEAPORTS OF NEW SOUTH WALES - A RESUME OF THE  
FACILITIES AND OTHER RELEVANT MATTERS.

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Owing to its geographical position, the expansion of industry in New South Wales is dependent to a large degree on shipping facilities and other transport services. The coastline of New South Wales, which has an approximate length of 700 miles is well provided with natural harbours, artificial harbours, bar harbours and also a number of roadsteads which afford shelter to shipping.

There are four natural harbours where vessels of deep draught may enter; these are Port Stephens, Broken Bay, Port Jackson (Sydney Harbour) and Jervis Bay. Port Jackson ranks first in importance in New South Wales and Australasia on account of its extent, natural facilities and volume of trade; Port Stephens and Broken Bay have not been developed to any great extent owing to their being relatively close to Newcastle and Sydney, respectively. Jervis Bay, which is 82 miles south of Sydney, is looked upon as a very fine harbour and part of this has been ceded to the Commonwealth Government as a port for Canberra, the Federal Capital. At Newcastle, where there is a bar harbour at the mouth of the Hunter River, extensive accommodation has been provided for overseas shipping. Artificial harbours have been constructed at Coff's Harbour, Wollongong, Port Kembla, Shellharbour, Kiama and Ulladulla, but, with the exception of Port Kembla, they can only be used by relatively small vessels.

There is quite a number of bar or estuarine harbours, both on the North and South Coasts of this State, but the entrances are usually blocked to some extent by sandbars. Breakwaters have been constructed to control the movement of sand at the majority of bar or estuarine harbours so that the navigable channels may be maintained with little difficulty. The bar or estuarine harbours on the coast of New South Wales are:- Tweed River, Richmond River, Clarence River, Bellinger River, Nambucca River, Macleay River, Port Macquarie, Camden Haven, Manning River, Forster, Crookhaven, Bateman's Bay, Moruya River, Narooma (Wogonga River) and Merimbula. In addition, the following are safe anchorages under certain weather conditions:- Byron Bay, Woolgoolga, Trial Bay, Crowdy Bay, Seal Rocks, Botany Bay, Bermagui Bay and Twofold Bay. At this stage, however, the shipping trade of the ports other than Sydney, Newcastle and Port Kembla is relatively small.

The principal port of New South Wales is Port Jackson (Sydney Harbour) which has a safe entrance and provides good shelter. The total area of the harbour is 14,284 acres, or about 22 square miles, with a depth of not less than 80 feet at the heads and approximately 30 feet over about half of the total area. The foreshores, which extend a distance of over 188 miles, afford splendid facilities for wharfage, actual figures being 266 berths with a total length of 76,993 feet.

/The .....



The wharves are about 4 to 5 miles from the heads and are situated close to the main business centre of Sydney. The principal wharves are leased to the various shipping companies whose vessels regularly carry cargo to and from the port, but other wharves are available for those vessels which are only occasional visitors to Sydney. Out of the total of 266 berths available, 82 are given over to overseas, 27 to interstate and 43 to intrastate vessels, the balance comprising ferry berths, harbour trade berths and cross wharves adjoining ships' berths. A very important feature of Sydney Harbour is the Terminal Wheat Elevators at Glebe Island, between Rozelle and White Bay where special facilities are employed for the bulk handling of wheat and where grain may be loaded into vessels at the rate of 1,400 tons per hour. Another prominent feature of Sydney harbour, although not closely allied with shipping facilities, is the Harbour bridge, spanning the Harbour between Dawes Point on the southern and Milson's Point on the northern side. The bridge was opened for traffic on the 19th March, 1932, and the cost of the entire structure was in the vicinity of £10,000,000. The total length of the bridge with railway and roadway approaches is  $2\frac{3}{4}$  miles, although the main arch of the structure is a steel arch span of 1,650 feet. The clearance for shipping is 170 feet from high water level and the width of the deck, overall, 160 feet; it carries a roadway 57 feet wide in the centre as well as a pair of railway tracks on each side and a footway 10 feet wide on each extreme outside.

Some idea as to the extent of shipping in Port Jackson may be gained from the figures for the year ended 30th June, 1936, which show that 6,985 vessels with an aggregate tonnage of 10,479,774 tons entered Sydney harbour, coastal vessels numbering 4,398 and oversea and interstate 2,587, the tonnage being 1,502,746 and 8,977,028 tons, respectively.

Port Jackson and Botany Bay are in close proximity, no more than 12 miles separating the southern head of the former from the northern head of the latter and at their nearest points are separated by not more than 6 miles. A great part of Sydney is built upon the area lying between the two harbours. Botany Bay is, as yet, substantially undeveloped and although its natural facilities from a shipping point of view are much inferior to those of Port Jackson, actually it is a potentially valuable harbour, destined, no doubt, to be the future subsidiary port of the commercial capital of Australia. Already it is spoken of as ideally suited for development as Sydney's air-port for flying-boats from overseas.

The second port in New South Wales is Newcastle, which, in addition, may be regarded as the fourth port in Australia in regard to the volume of shipping entering and clearing the port. The harbour is situated at the mouth of the Hunter River and, although its limits are not defined, an area of about 990 acres is enclosed by about 8 miles of coastline. The area used by shipping is about 570 acres, excluding the entrance to the harbour and the inner basin which, together, cover an area of approximately 162 acres.

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The entrance between the breakwaters is 1,500 feet; the navigable channel is 600 feet wide with a minimum depth of 25 feet 6 inches at low water, but it is possible for vessels drawing 29 feet to enter at high water during favourable weather conditions. The harbour is considered to be safe in all kinds of weather and breakwaters have been erected to improve the entrance and prevent the ingress of sand.

Although Newcastle is primarily a coal loading port, the proximity of the coal fields has resulted in the establishment of many other important industries, principally iron and steel works and other allied metal trades. Progress has been made in shipping wool, wheat and frozen meat, a terminal elevator being erected for the export of bulk wheat and suitable wharfage provided for wheat loading purposes.

Out of the total wharfage of 22,900 feet provided, 9,198 feet are used for the shipment of coal, 6,722 feet for general cargo, 2,643 feet for government purposes and 3,397 feet are leased. A floating dock of 15,000 tons capacity is available at the Government Dockyard, Walsh Island. The main railway system connects with the general cargo wharves and, as well, extends to the coal wharves. Shipping entering the port during the year ended 30th June, 1936, totalled 3,885 vessels, aggregating 4,422,581 tons made up of coastal vessels 2,333 - 1,094,584 tons, interstate 1,101 - 1,678,460 tons and overseas 451 - 4,422,581 tons.

Port Kembla, one of the artificial harbours on the New South Wales coastline south of Sydney, has facilities both for the loading and discharging of cargo from coastal and overseas vessels. Situated, as it is, in the centre of a rapidly expanding industrial centre, it must not be overlooked as ranking among the foremost ports in the commercial activity of the State. Iron, steel and coal are perhaps the commodities handled the most at this port, but, with additional works being constructed for the manufacture of various items, the future development of the port seems assured. Connected as it is with the South Coast rail system and the Southern Line network, it is probable that in later years quite a proportion of this State's primary products will be shipped overseas and to other States from this rapidly-growing port. Reference is made in a later part of this article to the volume of trade at this centre.

In both Sydney and Newcastle Harbours ferry services, which are controlled by private companies, are operating. The conditions under which such services are conducted are governed by licenses. Figures for the year ended 30th June, 1936, show that 45 boats licensed to carry 34,728 passengers were operating and passengers carried during the same year aggregated 24,559,760.

The prosperity and national wealth of New South Wales are shown to a large degree in the cargoes shipped and discharged at the various ports, the chief of which are Sydney, Newcastle and Port Kembla, the interstate and overseas trade of this State being

/largely ....



largely confined to these three centres. The commodities handled are wide and varied and embrace practically each one of our primary products as well as manufactured articles and miscellaneous goods from most countries of the world.

The greater part of our overseas trade is handled at Sydney, the activities of the ports of Newcastle and Port Kembla being largely centred in the local coal mining and steel industries. Cargoes handled at these two ports are chiefly dead weight, while a large proportion of the cargoes shipped and discharged at Sydney is recorded in tons measurement.

In the following table, figures are shown which indicate the volume of trade at Sydney, Port Kembla and Newcastle for the twelve months ended 30th June, 1936:-

Year ended 30th June	SYDNEY				NEWCASTLE		PORT KEMBLA	
	Interstate		Overseas		Inter-state	Over-seas	Inter-State	Over-seas
	tons weight	tons measurement	tons weight	tons measurement	tons weight	tons measurement	tons weight	tons measurement
1936	478,974	598,895	840,659	972,307	1,266,415	128,458	319,736	42,494
			<u>CARGOES SHIPPED</u>					
1936	190,649	594,713	1,165,737	284,031	1,990,887	285,981	171,879	83,523

Vessels engaged in the overseas trade with New South Wales are chiefly under the British Flag and owned for the most part by ship-owners in the United Kingdom, while the control of the interstate trade is in the hands of shipping companies registered in Australia.

(To be continued)

G.C.

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The wheat crops of New South Wales were materially improved in many areas by useful rains during October. In the later districts, yield prospects were considerably improved and the risk of a serious failure averted.

During early November, heavy rains fell in the north-west and these will help considerably the late crops in that district as this section of the State did not participate to any marked extent in the earlier rains.

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THE LIVESTOCK INDUSTRY ACT, 1937, OF THE UNITED KINGDOM.

The Livestock Industry Act, 1937, was enacted on the 20th July, 1937, in order to make provision for the development and better organisation of the livestock industry and other industries connected therewith in the United Kingdom; for paying a subsidy to producers of fat cattle; for regulating the importation of livestock and meat, the holding of livestock markets and the slaughtering of livestock. The Act has been divided into eight sections, with relevant subsections dealing with various phases of the meat and livestock industry and, while the greater part of the Act relates to the overseas producer, Section 3 is the one of most interest to those engaged in the industry in Australia, as this Section deals solely with the regulation of imports of livestock and meat into the United Kingdom.

Under the provisions of Section 3 of the Act, the Board of Trade may, by order which is in the nature of a proclamation, regulate the importation into the United Kingdom of any such livestock or meat as may be described in the order, if it appears to the Board, having regard to the interests of all classes of persons concerned, whether producers or consumers, and to the commercial relations between the United Kingdom and other countries, that the making of the order is desirable as a means of securing the stability of the market for livestock and meat in the United Kingdom.

In any such orders the Board of Trade may determine, for any such period as may be specified, the quantities of such livestock or meat, or of any description thereof, which may be imported. The order may describe such livestock or meat by reference to the country or place from which it is exported to the United Kingdom and shall contain such provisions as appear necessary to the Board of Trade for securing the operation and enforcement of the scheme of regulation contained in any such order.

Orders made by the Board of Trade under Section 11, Part III, of the Livestock Industry Act, 1937, shall cease to have effect on the expiration of 30 days from the beginning of the day on which the order was made, unless before the expiration of the period the order has been approved by each House of Parliament, without prejudice, however, to anything previously done under the order, or to the making of a new order.

It is clearly set out in the Act that the provisions in no way affect the importation of bacon and hams as no power is given to the Board of Trade under the Act in respect of these items. The Board of Trade has also been given power to obtain information from all persons engaged in the meat trade, of stocks of meat and any other particulars in regard to meat and livestock.

It is also defined that any order made may be applicable to the whole of the United Kingdom or to any part thereof.



THE ORGANISATION OF THE DRIED FRUITS INDUSTRY FOR  
MARKETING PURPOSES.

The Dried Fruits Industry in Australia may be divided into two sections, viz., Dried Vine Fruits and Dried Tree Fruits, the production of each of which for 1934-35 was:-

Dried Vine Fruits - 1934-35.

	<u>Sultanas &amp; Lexias</u> Tons	<u>Currants</u> Tons	<u>Total</u> Tons
Victoria	29,637	8,801	38,438
South Australia	12,234	9,259	21,493
New South Wales	3,381	755	4,136
Western Australia	646	2,037	2,683
<b>TOTAL:</b>	<b>45,898</b>	<b>20,852</b>	<b>66,750</b>

Dried Tree Fruits - 1934-35.

<u>Fruit</u>	<u>N.S.W.</u> lb.	<u>Vic.</u> lb.	<u>S.A.</u> lb.	<u>W.A.</u> lb.	<u>Tas.</u> lb.	<u>Total</u> lb.
Apples	5,029	3,301	51,408	652	742,339	802,709
Apricots	573,837	116,007	2,250,640	1,918	-	2,942,402
Figs	45,736	6,239	53,200	2,080	-	107,255
Peaches	277,845	165,363	540,848	633	-	984,689
Pears	44,548	22,773	326,256	378	-	393,955
Plums	23,367	-	73,248	-	-	96,615
Prunes	3,705,907	571,715	1,206,128	3,534	-	5,487,284
Nectarines	18,774	379	87,920	66	-	107,139
Other	-	-	-	360	-	360
<b>TOTAL:</b>	<b>4,695,043</b>	<b>885,777</b>	<b>4,589,648</b>	<b>9,621</b>	<b>742,339</b>	<b>10,922,428</b>

Total Production from 1928-29 to 1934-35.

<u>Year</u>	<u>Dried Vine Fruits</u> Tons	<u>Dried Tree Fruits</u> Tons
1928-29	72,194	4,188
1929-30	73,446	4,377
1930-31	50,802	4,067
1931-32	60,353	2,402
1932-33	77,025	5,137
1933-34	68,497	4,980
1934-35	66,750	4,876

(The above figures are from the Commonwealth Production Bulletin No.29).



Statistics show that Victoria and South Australia are the main producers of Dried Vine Fruits, which are grown chiefly along the River Murray Irrigation areas, but extensive vineyards are also cultivated in Western Australia and New South Wales. Whilst Tasmania produces the bulk of the Dried Apples, New South Wales and South Australia are the main sources of the other Dried Tree Fruits.

The major portion of the prunes produced in New South Wales is grown in the Young district and on the Murrumbidgee Irrigation Areas, whilst the Irrigation Areas, including particularly the Murrumbidgee and Curlwaa, grow most of this State's other Dried Tree Fruits and also the Dried Vine Fruits.

Australia's production of Dried Fruits showed a gradual increase from 1901 up to the end of 1918; the high prices ruling during the last years of the World War stimulated plantings whilst large numbers of returned soldiers were placed on closer settlement areas suitable to vine and fruit tree culture, with consequent expansion in output. In round figures, Dried Vine Fruit production was:-

1901	2,000 tons	1918-19	15,000 tons
1910	9,000 "	1924-25	38,000 "
1914-15	10,000 "	1934-35	66,000 "

Up to 1912, Australia imported some raisins and currants, but since that year, she has become an exporter in increasing quantities. The local consumption is between 13,000 and 14,000 tons a year, so that approximately 80% of the production has to be exported. Shipments overseas during 1934-35 aggregated 54,499 tons, valued at £2,025,105. Of the total exports, 64% went to the United Kingdom, 28% to Canada and 6% to New Zealand. The quantity of Dried Tree Fruits exported during 1934-35 was 2,458 tons, valued at £134,426, the bulk going to Great Britain.

The United States of America is the largest producer of all dried grapes (currants, sultanas and raisins), Greece second, Turkey third and Australia fourth, whilst Persia, Palestine, Crete, South Africa, Cyprus and Chile grow considerable quantities. Greece is the largest exporter, with Turkey, Australia and the United States rivals for second place. Approximately half the world export of raisins and currants is consigned to the United Kingdom; other large importers are Germany, Netherlands, Canada, France, the Irish Free State, Belgium and New Zealand, whilst the United States, an exporter of raisins, imports currants from Greece, though in decreasing quantities.

Australia can only profitably compete in overseas markets for dried fruits where she receives preference and thus her main outlet is within the British Empire, particularly the United Kingdom where, following the agreement reached at the Imperial Economic Conference at Ottawa in 1932, the tariff on most of the dried fruits imported from foreign countries was increased and

/became .....



became £2 per ton on currants, £7 on apricots and £10.10.0 on sultanas, lexias, prunes, peaches, pears and nectarines. The Anglo-Grecian Trade Treaty precludes any immediate prospect of an advance in the present rate of preference (£2 per ton) being secured for Australian currants imported into Great Britain, but the rates for other dried fruits are of considerable benefit to Australian growers.

The growers deliver the fresh fruit to packing sheds established throughout the settlements, and it is then processed by machinery which cleans, stems, grades and packs it. The larger packing houses are equipped with efficient modern plant and are in a position to grade the products uniformly and thus market standard packs and the smaller sheds, though usually not so up-to-date, are subject to the same export requirements as to standards of quality.

Each of the four States (Victoria, South Australia, New South Wales and West Australia) has in operation an Act providing for the control by a State Board of dried fruit packing and selling within the respective States; every packing shed must be registered with the Board each year, and penalties are provided for non-registration. The New South Wales and Victorian Acts provide that registration may be refused any new packing shed if it is considered there are already sufficient sheds in a district capable of dealing with the fruit produced there. The administrative expenses of the Boards are met by charges on the dried fruit produced by each grower, these charges being mainly collected through the packing sheds.

The four State Boards confer from time to time and make estimates of production and domestic consumption of the various varieties of dried fruits; having thus determined the proportion of the production which should be retained for Australian requirements, uniform quotas are declared under the provisions of the State legislation in each State for the purpose of sale within that State. Whilst this method could prevent the sale in the State of origin of dried fruits in excess of the quotas determined, interstate trade could not be controlled by State legislation, and it was therefore necessary to pass a supplementary Commonwealth Act. The Commonwealth Dried Fruits Act 1928-1935 provided that dried fruits should not be transferred from one State to another except by license. These licenses were issued by the State Dried Fruit Boards as prescribed authorities for the Commonwealth, subject to conditions, inter alia, that export quotas were to be complied with; these export quotas were determined by the Commonwealth Minister for Commerce on the recommendation of the prescribed authorities (the State Boards) and were supplementary to those declared under the State Acts. This regulation of interstate trade by means of the Commonwealth Dried Fruits Act 1928-1935 was attacked in the Courts in what is now known as the "James Case" and it was subsequently held by the Privy Council to be in excess of Constitutional powers. The decision led to the Commonwealth holding a referendum seeking a constitutional amendment, but without success. However, practically all the various dried fruit packing houses and distributing agents in Australia have continued the system previously in existence on a co-operative basis.

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The Commonwealth Dried Fruits Control Board was appointed in 1925 under the Dried Fruits Export Control Act, 1924, for the purpose of controlling the export overseas and distribution after export of Australian dried vine fruits. It consists of three representatives elected by the growers of each of the States of Victoria, New South Wales and South Australia, one by the growers of West Australia, two representatives with commercial experience appointed by the Commonwealth Government and one Commonwealth Government officer. The Board has established a London agency to organise the overseas marketing and supervise the quality condition and sale of the fruit, appraise each parcel prior to its offer for sale, and confer with distributors to secure improved marketing conditions. A levy of one-eighth penny per lb. on all dried sultanas and of one-sixteenth penny per lb. on all dried currants and lexias exported is collected by the Customs Department and paid to the Control Board for administrative and propaganda purposes.

The bulk of the dried fruit packed in Australia is handled by packers, agents and merchants who are members of the Australian Dried Fruit Association (A.D.F.A.), which controls the industry in accordance with the Federal and State legislation. It charges a "Head Office Levy" of 2/6d per ton to cover its costs of administration, which is mainly confined to the maintenance of prices in order to take advantage of tariff protection. It also imposes an "Interstate Charge" in order that the grower who sells his fruit in a nearby market may not reap a greater return than one who has to ship further afield; the total charges for freight, handling, marine insurance, exchange, port marking, wharfage and other shipping costs on fruit sold in Australia are estimated and apportioned amongst the growers in the different States as equitably as possible, and agents deduct a flat rate per ton to cover these charges, paying any excess to or debiting any shortage to the A.D.F.A.

The Dried Vine Fruit Industry has been closely associated with wine production; when prices of dried currants and lexias declined to an unprofitable level, quantities of grapes were diverted to distilleries causing a glut in spirit and a fall in the value thereof, leading to the passing of the Wine Export Bounty Act of 1924. Conversely, an increase in the values of dried fruits causes a diversion of some of the grapes from the wineries to the packing houses.

Whilst the Dried Fruit industry can be said to be in a generally satisfactory position and there is a considerable area of land available suitable for Vine or Fruit culture, any further development is not likely to be encouraged unless Australia is allotted a greater quota on the British market or receives further preferences from other dominions.

C.K.



EXPORT OF GRAPES TO CHINA.

Some time ago a communication was sent by the Director of Marketing to the Australian Trade Commissioner in Shanghai (Mr. V.G. Bowden) requesting the supply of information relating to the importation of grapes into Hong Kong and Shanghai. This action was taken with a view to testing the possibilities of China as an outlet for a proportion of this State's surplus production of grapes.

A reply has come to hand and the gist thereof is published for the information of interested parties. With regard to Shanghai, Mr. Bowden states that the Chinese Maritime Customs are unable to furnish statistics relating to the import of grapes, as separate records are not kept for this fruit. Grapes are included in the general statistical item "Fresh Fruits not otherwise recorded", but to quote figures of imports under this heading would not be of any value since the quantity of grapes contained therein could not be given.

From inquiries which were made in the trade it appears that the demand for imported grapes is very limited, because the fruit is not only expensive, but also for the reason that Chinese fruit dealers are not keen to handle it in view of the likelihood of their sustaining losses.

Grapes are chiefly imported from the U.S.A. and to a lesser extent from Australia; imports from other than these countries are said to be negligible. It has been estimated that the total annual import of grapes into Shanghai is now in the vicinity of 6,000 boxes, some of which are packed 32 lbs. to the box and some 22 lbs. There is no means of checking this estimate and therefore it should be accepted with reservation.

Grapes are produced in China and are sold on the local market roughly during the period July to October. Chefoo is the main producing centre. Chinese grapes are not regarded as being of very good quality, and they are said to keep only for a short time after picking.

The duty on grapes imported into China is 20% ad valorem, and with respect to imports into Shanghai, which is the main entrepot, additional charges are levied amounting to 14% of the duty. These charges consist of 5% Flood Relief Surtax, 5% Revenue Surtax, 3% Conservancy Dues and 1% Wharfage Dues. There are no quotas or restrictions relating to the import of grapes into China.

By way of general remarks, the Trade Commissioner says that Australian grapes are quite well-known to fruit importers, but it is doubtful whether the trade can be increased to any substantial extent. The high Customs duties and low exchange are factors which tend to curtail demand. Dealers buy only according to their requirements based on their established monthly sales. There is not much

/possibility ....



possibility of pushing sales to reach a wider class of consumer since even with lower prices per case of imported fruit the amount of reduction distributed over per lb. or other selling unit would not bring down the retail price to a great extent, and certainly not sufficiently to permit the purchase of Australian grapes by the average Chinese householder.

With regard to Hong Kong, Mr. Bowden was in communication with the Superintendent of Imports and Exports and he advised that separate statistics are not kept of the imports of grapes into Hong Kong. There are no quotas or restrictions relating to the imports of grapes into Hong Kong, nor are they subject to any Tariff duty.

It is understood that Australian grapes are well-known to and favoured by fruit importers in Hong Kong, but the market for grapes there is not very extensive, consumption by the Chinese population being very small indeed. It is believed that a fair proportion of the imports of grapes into Hong Kong are re-shipped on deck to Haiphong and Saigon in French Indo-China.

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#### THE OTTAWA AGREEMENT.

The terms of the Ottawa Agreement did not come under review at the Imperial Conferences, which took place between Great Britain and the Dominions shortly after the Coronation. These Conferences dealt mainly with questions of defence and foreign policy, and the question of trade between Empire countries was made the subject of a series of bi-lateral talks.

Since the Ottawa Conference several economic changes, affecting both Great Britain and the Dominions, have taken place, and, for that reason, modifications in the structure of Imperial trade are forecast. A policy of support for the home farmer, as well as the favouring of imports from countries who purchase British goods, has been growing steadily in Great Britain. Again, expansion of manufactures in the Dominions has taken place, and in several instances, whilst manufactured goods from Empire countries were allowed into Britain duty free, United Kingdom manufactures are subject to duty in the Dominions. A further factor which might affect Imperial trade is the proposed treaty between Great Britain and the U.S.A., as it is understood that the U.S.A. is endeavouring to secure greater freedom of trade with the Empire.

The present United Kingdom-Australian trade agreement expires at the end of this year, and it is understood that a new agreement will be discussed early in 1938. India has given notice to terminate the Ottawa Agreement, but, pending the completion of a new agreement, its terms still remain in force. Canada has completed a new agreement with Great Britain and a new Canadian-Australian pact became effective as from 1st October, 1937. Preliminary talks between New Zealand and Great Britain have taken place, but no finality has, as yet, been reached.

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THE WHEAT GROWING INDUSTRY OF NEW SOUTH WALES.

In this, the second of a series of articles on wheat growing, the development of this important industry is further traversed and a schedule is appended setting out the areas sown for grain in New South Wales and Australia since the beginning of the century. It is proposed to insert in future issues statements showing details of production, exports and average prices, etc.

Land has been acquired for wheat growing in various ways. The principal methods have been by the selection of Crown lands and by the purchase of subdivided private pastoral lands. The purchase of the latter has either been made from the Crown (where the Government has resumed private holdings for the purpose of subdivision) or direct from the owners. Originally, most of the land was utilised for pastoral purposes and the bulk of it had considerable value for use in that direction. However, the development of labour-saving machinery, the improvement in farming practice, and the good prices obtainable for wheat (particularly between 1903 and 1929) rendered wheat growing a profitable undertaking and consequently much of the pastoral land suitable for wheat culture was subdivided into farms for this purpose. At the same time good returns were being obtained from sheep, and on this account, as well as because of sentiment, many of the large holdings were retained as such.

From 1929 till last year the low prices ruling for wheat made wheat growing unattractive. The sheep industry has not suffered to the same extent, and for this and other reasons the value of pastoral lands has remained at a fairly high figure.

The technique of farming, owing principally to the activities of the Department of Agriculture, has reached an advanced stage of efficiency, despite the fact that yields are apparently low. The comparatively low State average yield of approximately 12 bushels per acre is due to the low rainfall in the wheat belt, particularly on the Western side. There, a very large acreage is grown where the average annual rainfall is from 15 to 17 inches per annum, and the resultant low yield in this portion of the wheat belt brings down the State average.

Wheat farms vary in size from about 500 to 2,000 acres. This crop is also grown on farms of considerably more than 2,000 acres. To a considerable extent wheat growing is conducted in conjunction with sheep raising, and to a lesser extent with dairying. Many of the wheat farms in the more favourable districts are from 500 to 700 acres in size, the farmers depending almost entirely on wheat growing, although they may keep a few sheep. On the larger farms more sheep are kept, the proportion of wheat to sheep on a revenue basis varying according to the area and pastoral nature of the land, from a predominance of wheat to a predominance of sheep.

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On many farms sheep raising for the production of fat lambs has become of considerable importance during recent years and, in order partly to increase the feed supply for sheep and partly to eradicate diseases to which wheat is subject but to which oats are immune (such as flag smut and foot rot), oats are being more extensively sown in rotation with wheat.

In 1913 the wheat acreage was 3,203,000 acres, in 1928 4,090,000 acres and in 1930-31 the peak of 5,135,000 acres was reached. This was largely due to a special Governmental appeal to the wheat-growers.

Owing to the low price realised for the 1930-31 harvest and the difficulty in financing operations, the area declined to 3,683,000 acres next year. As the realisations were again unremunerative, production was stimulated by means of a Federal Bounty, whilst Relief Acts were passed in succeeding years to and including the 1935-36 crop; from August, 1935, prices improved and those for 1936-37 have been satisfactory.

The production figures for the seasons 1930-31 to 1936-37 are:-

<u>Season</u>	<u>Production</u> (bushels)	<u>Yield per acre.</u> (bushels)
1930-31	65,877,000	12.83
1931-32	54,966,000	14.92
1932-33	78,870,000	16.42
1933-34	57,057,000	12.45
1934-35	48,678,000	12.50
1935-36	48,822,000	12.68
1936-37 (a)	54,837,000	13.84

(a) subject to revision.

(Figures from Commonwealth Production Bulletin).

Preliminary returns for 1937-38 sowings indicate an increase of approximately 14% above the 1936-37 acreage.

The New South Wales Government Statistician estimates that the average annual consumption of wheat in this State is 20,500,000 bushels, made up of:-

	<u>Bushels</u>
Converted into flour for home consumption ..	12,750,000
Various other purposes, mainly poultry feed ..	3,250,000
Seed requirements .. ..	4,500,000
<u>TOTAL:</u> ..	<u>20,500,000</u>

This leaves the exportable surplus for 1936-37 at approximately 34,000,000 bushels. A proportion of the New South Wales surplus, varying from year to year, is absorbed by other States, principally Queensland, but the bulk has to be sold overseas.



W H E A T.Area sown for Grain - New South Wales and Australia.

YEAR	NEW SOUTH WALES	AUSTRALIA
	acres	acres
1900-01	1,530,609	5,666,614
1901-02	1,392,070	5,115,965
1902-03	1,279,760	5,156,049
1903-04	1,561,111	5,566,340
1904-05	1,775,955	6,269,778
1905-06	1,939,447	6,122,746
1906-07	1,866,253	5,982,186
1907-08	1,390,171	5,383,911
1908-09	1,394,056	5,262,473
1909-10	1,990,180	6,586,236
1910-11	2,128,826	7,372,456
1911-12	2,379,968	7,427,834
1912-13	2,230,500	7,339,651
1913-14	3,203,572	9,287,398
1914-15	2,756,543	9,651,081
1915-16	4,186,493	12,484,512
1916-17	3,805,699	11,532,828
1917-18	3,328,656	9,774,658
1918-19	2,409,633	7,990,165
1919-20	1,474,035	6,419,160
1920-21	3,126,775	9,072,167
1921-22	3,194,403	9,719,042
1922-23	2,942,539	9,763,861
1923-24	2,945,040	9,540,434
1924-25	3,549,367	10,824,966
1925-26	2,924,745	10,201,276
1926-27	3,352,298	11,687,919
1927-28	3,029,950	12,279,088
1928-29	4,090,083	14,840,113
1929-30	3,974,064	14,976,564
1930-31	5,134,960	18,164,920
1931-32	3,682,945	14,741,313
1932-33	4,803,943	15,765,504
1933-34	4,584,092	14,901,271
1934-35	3,892,768	12,544,178
1935-36	3,851,373	11,956,966
1936-37	3,962,000	12,284,000

Extracted from "Commonwealth Production Bulletin" No.29 and  
 "Quarterly Summary of Australian Statistics", Bulletin No.148.



HEAVIER YARDINGS OF SHEEP AND CATTLE  
AT HOMEBUSH SALEYARDS, SYDNEY.

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The industrial dispute at the Homebush Abattoirs early in October seriously disorganised the auctions of sheep and lambs on several sale days at the Homebush yards and resulted in a considerable falling-off in the numbers which would have been normally disposed of. The actual pennings for the month aggregated 244,716 head of which 143,355 were suckers, old lambs and hoggets and 101,361 wethers and ewes. Comparing these figures with the totals for the same month last year, it was found that they were 82,000 head less, which constitutes quite a considerable quantity of mutton and lamb. Naturally, with supplies short early in the month, prices for sheep and lambs were particularly high, especially for those sold during the period of the dispute, when an endeavour was made by agents to clear those sheep and lambs which were on their hands. Supplies of mutton and lamb, both for the wholesale and retail meat trade were scarce, resulting in a sharp rise in price to the consumer. On the resumption of selling, which occurred on Monday, 18th October, values for sheep and lambs became more normal. Another feature during October was the discontinuance of the three selling days per week, which had not met with a full measure of success. Commencing on Thursday, 28th October, 1937, there was a reversion to the bi-weekly sales held on Monday and Thursday of each week and they will be conducted on these days until the New Year, when the position will be reviewed. The shortage of rolling stock and the difficulty of keeping sufficient trucks in operation to cope with the demands of a three day selling week is said to have influenced the decision. At this stage it is difficult to foresee just what the position will be in the New Year and whether sales on three days in each week will then be justified.

Speaking generally, the yardings throughout could be regarded as a fair average only from the viewpoint of the meat trade. A large number of the wethers and ewes penned were of fair to good trade quality, there being a scarcity of prime, sappy sheep for local and export requirements. As might be expected, only occasional consignments of full-woolled sheep were forward, the greater part of the supply comprising shorn descriptions. Apart from the early part of the month, when the position created by the industrial dispute resulted in very high values, rates for all grades of mutton were, for the most part, considerably lower than during the previous month; good light wether mutton at the closing sales of September was costing  $4\frac{3}{4}$ d per lb., while similar mutton sold on the last sale day in October was only worth  $3\frac{1}{2}$ d, with odd sales at  $3\frac{1}{2}$ d per lb. Although values fluctuated considerably for both wethers and ewes during October, the month as a whole could be taken as showing a decline of from 1d to  $1\frac{1}{2}$ d per lb. for the better grades of mutton with plainer grades showing a still further reduction. Some of the best shorn wethers sold to 21/- per head, but average values were from 14/- to 18/-, with

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ewes selling at from 12/- to 17/- per head. The cost of wether mutton on the hoof during the closing sales was 3d to 3½d per lb. and ewe mutton 2½d to 3d, with odd sales of very choice reaching 3½d per lb. Very plain mutton could be purchased as low as 1d per lb.

With the advent of heavier yardings of sucker lambs, it was noticeable that there was considerable activity amongst those buyers engaged in the export trade. Quite a fair proportion of the pennings was suitable for buyers' requirements, but the fact should not be overlooked that there were also large numbers of lambs on the dry side and not up to the standard required in the export trade. Taking into consideration the adverse seasonal conditions experienced during the lambing and growing period, however, the lambs have shown up remarkably well. Some very good prices have been realised, up to 30/- per head being obtained on several occasions; most sales, however, were effected at prices ranging from 20/- to 26/- for the better descriptions, with other classes realising relatively lower rates. The market was irregular, but values for the most part did not depreciate to such an extent as was the case with grown sheep; the fall ranged from ½d to ¾d per lb., but the greater part of the lamb sold was only ¼d lower. Prices ruling at the closing sale of October were:- Suckers to 6½d, hoggets to 4d, old lambs to 5½d per lb. for the better grades with plainer descriptions lower. Despite the lower prices for mutton and lamb at the Homebush Saleyards, the returns to graziers may still be regarded as satisfactory. Prices realised for mutton and lamb during the corresponding month last year were on an average considerably lower than those ruling this year, although values during the closing sales were at about the same level in each instance.

Values for skins did not hold in several instances. A decline of ¼d per lb. was noticeable for some classes of skins, while in a number of cases the fall exceeded ½d. While this affected the actual realisations per head of sheep and lambs, the reduction in skin values was not reflected to any large degree in the ruling rates for mutton and lamb.

Cattle sales were not affected by the industrial trouble at the Abattoirs. Over 26,000 head were auctioned, representing an increase of 2,000 on last month's total. There were also larger numbers forwarded from Queensland stations, while nearly 3,000 of the total comprised bulls and stores.

The general appearance of the stock indicated that conditions in grazing areas left much to be desired. However, the rains received about mid-October proved particularly beneficial to a considerable portion of the State and promoted growth of grasses. Nevertheless, many districts received only light falls, noticeably in the more Western parts and the position in some areas continues adverse. The prevalence of huge swarms of grasshoppers over a wide tract of country added to the unfavourable outlook.



In a few instances owners were able to consign cattle worthy of any fat stock market. Outstanding lots among these were particularly well finished; they represented only a very small proportion of the total, and showed by contrast how inferior a large number of the cattle were. On one sale day, fully 80% were no better than stores, it being extremely difficult to find more than an odd pen of prime grade.

Shorthorns made the best showing among the bullocks offered and several small drafts arriving from the north-west were of really good quality. There was always a moderate supply of fair to good trade beef in evidence which met a satisfactory demand.

Fair to medium quality steers were represented in reasonable numbers on most sale days but, generally speaking, prime lots were rather scarce. Early in the month a line of mixed breeds and suitable weights made the equivalent of from 43/- to 44/- per 100 lbs. dressed weight. For this and similar lines, buyers evinced a keen interest.

Cow and heifer beef, with the exception of plain and inferior types, was in demand throughout the period; fluctuations were apparent but generally rates were high. Heifers of prime quality in some instances were disposed of at the equivalent of 40/- and over per 100 lbs. of beef. Occasional lots were particularly attractive in appearance and showed the result of careful handling.

For quite an extended period a shortage in the number of good vealers and yearlings has been evident, and it was a change to see one or two outstanding drafts yarded. On one sale day a draft of about 100 vealers was noticed which was as good as any seen at Homebush for some time. From eight to fourteen months old, with weights ranging from 340 lbs. to 530 lbs., they averaged £9.0.0 per head. The highest rates paid for this class of beef were from 47/- up to 52/- per 100 lbs. on the hoof.

No great variation was noticeable in the market during the period under review. Taking into consideration the general lack of quality, the numbers yarded and the increased supplies of mutton and lamb available, the market position throughout could be regarded as very satisfactory.

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During the period 1st December, 1936, to 2nd November, 1937, wheat exports from Australia were equivalent to 93,264,279 bushels. Shipments of wheat, and flour expressed in terms of wheat, from New South Wales aggregated 27,376,488 bushels, Victoria 30,009,113, South Australia 20,920,251, and Western Australia 14,958,427.

The total exports from Australia for the corresponding period of the previous season amounted to 90,488,556 bushels.

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

A dull demand continued to rule for potatoes during October. New season's tubers commenced to arrive in appreciable quantities from the Northern Rivers and approximately 9,000 bags were available in Sussex Street. Prices for these early in the period were as high as £8.0.0 per ton but, later, due to a decline in the standard of the offerings, agents experienced difficulty in obtaining £4.0.0. Buyers seemed to prefer the old season's tubers to the new and it was interesting to note that realisations for the former were generally in excess of those for new tubers. At the end of October, however, 600 bags of Western Australian new "Delawares" were received; these were of large size and cleared rapidly at £6.0.0 to £8.0.0 per ton, despite the fact that they were slightly immature. Tasmanian shipments amounted to 60,870 bags and the market showed a tendency to firm. The whiteskin potatoes on offer were only of medium quality due to the advancement of the season and Bismarcks were practically unobtainable. The result was an increased demand for Brownells, values of which appreciated. The range of prices throughout the month was as follows:- Brownells £5.0.0 to £7.0.0; Bismarcks and Arranchiefs £3.10.0 to £4.10.0; Snowflakes £4.0.0 to £5.0.0 per ton. The first Victorian shipments to arrive for some considerable time were received and totalled 3,000 bags. These were of the Snowflake variety and moved out quietly at £4.0.0 to £5.0.0 per ton, according to quality.

Turning now to potato-selling activities at the Alexandria Railway Goods Yard, we find that the position was practically unaltered from that of September, except that new potatoes were more in evidence. Local growers consigned 10,434 bags of old and 1,644 of new season's tubers. Prices recorded at auction ranged as follow:- (Old) No.1 Grade £2.0.0 to £6.0.0, No.2 Grade £2.0.0 to £2.13.4, Seed £2.0.0; (New) £4.1.8 to £10.5.0, No.2 Grade £2.10.0 to £7.15.0 per ton. The market tone varied in sympathy with that for interstate stocks and prices fluctuated accordingly. Generally speaking, the demand was firmer during the early part of the month.

The period under review marked the commencement of the local white onion season at Alexandria. Deliveries became appreciable at the very beginning of the month and, although the first two consignments realised £30.0.0 and £22.15.0 per ton, respectively, prices soon declined to the more normal level of £9.5.0 to £14.0.0 per ton. Supplies approximated 4,700 bags and inquiry was more or less dictated by the variations in the weather. The lower rates mentioned in the above range ruled during one or two inclement periods of the month. Shipments from Victoria amounted to nearly 6,000 bags but as these were augmented by the arrival of 1,200 from Queensland, the market had an easier tendency. Quotations were:- Victorian - (Brown) £13.0.0 to £15.0.0, (White) £11.0.0 to £15.0.0; Queensland - (Brown) £12.0.0 to £15.0.0, (White) £11.0.0 to £12.0.0 per ton.

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The general state of the market may be considered unsatisfactory as supplies were in excess of trade requirements.

Local pumpkins were practically unobtainable as the season was far advanced. The field was left clear for Queensland stocks and, due to the poor market ruling in Brisbane, these were quickly forthcoming. Sea arrivals amounted to 1,200 bags which met with a fairly satisfactory request at from £7.0.0 to £9.0.0 per ton. A total of 59 trucks was received at rail and the market opened at £5.0.0 to £7.0.0 per ton. About the middle of the month it advanced to £10.0.0 but later declined to £8.10.0. Trading was fairly steady.

Tasmanian swedes, carrots and parsnips were practically out of season and the moderate quantities available were not of a very high standard of quality. The totals of the shipments were:- Swedes 545 bags; Carrots 304; Parsnips 166. Speaking generally, carrots were more in request than the other vegetables and rates right throughout the period were firm at £10.0.0 per ton. Those of swedes and parsnips, however, showed little variation from the prices quoted during September, both selling at £4.0.0 to £5.0.0 per ton. The old season's supplies are now almost exhausted and it is not expected that much trading in these vegetables will be transacted until the new stocks are ready.

Rail consignments of local oaten chaff to Alexandria were fifty per cent. larger than they were during September. It is natural, therefore, that the unfavourable conditions noticeable during the previous month should continue to rule. The 200 trucks received were in excess of trade requirements and this fact, coupled with considerable rain in the country districts, resulted in prices declining by upwards of 30/- per ton. Sales during the first half of the period ranged from £4.5.0 to £7.5.0 but, subsequently, £6.5.0 per ton was the best price obtainable. The 4,800 bags of oaten chaff received from Tasmania also tended to weaken the position and, due to an indifferent standard of quality, agents experienced difficulty in clearing stocks. Prime was quoted at £6.0.0 to £6.10.0 per ton, with sales for medium at as low as £5.0.0. The 60 trucks of wheaten at rail acted more or less as a supplement to the oaten chaff and other than choice lines were slow to clear. From £4.0.0 to £7.0.0 per ton was realised.

The market for the 93 trucks of lucerne chaff was regulated by that of grain chaff. A brisk demand was apparent early and prices were at the high level of £8.5.0 per ton. Agents, however, soon found themselves obliged to reduce prices in order to effect satisfactory clearances and realisations ranged from £4.15.0 to £6.10.0 per ton for the remainder of the period. Sales of lucerne hay were also adversely affected by the increased competition and, although stocks amounting to 202 trucks were lighter, prices showed a general depreciation. Maitland soft hay predominated throughout the greater part of the month and on several occasions realisations were as low as £2.0.0 per ton, even for passable quality. When the market was favourable, however, £4.10.0 was easily obtainable. Stocks from other  
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centres benefited by the shortage of mature hay and cleared well at £5.10.0 to £7.10.0 per ton. Shipments of lucerne hay from the Hunter River to Sussex Street were much larger. Demand, however, was at all times quite satisfactory and stocks sold well on arrival at the following rates:- (medium) £1.10.0 to £2.10.0, (prime) £3.0.0 to £4.15.0 per ton.

Supplies of Victorian oaten hay in Sussex Street were much lighter and totalled only 80 bales. Demand was far from brisk, however, and this offering was ample for all requirements. No change in prices took place, £9.10.0 per ton being quoted. Local oaten hay was also less in evidence and only portion of the 15 trucks at rail was offered to buyers. The market was a little easier at £8.0.0 to £9.10.0 per ton.

Generally smaller offerings of Tasmanian straw resulted in a very satisfactory inquiry for that product. Stocks, which totalled 5,100 bales were more equal to the demand and each shipment cleared rapidly on arrival at £4.10.0 per ton. Local consignments were also less extensive and the 8 trucks at rail moved out well at £4.5.0 to £5.0.0 per ton.

A surprising improvement in quality was a feature of wheat railed to Alexandria. Offerings, which totalled only 38 trucks, were of a high standard and, consequently, were much in request. Prime lots were sold at 5/- to 5/4<sup>1</sup>/<sub>2</sub>d per bushel, whilst choice realised from 5/5d to 5/8d.

Due to the lateness of the season, only small quantities of Northern Rivers maize were forthcoming during October. There was practically no country demand but, as supplies were insufficient to satisfy even local requirements, rates advanced steadily. The market opened at 5/3d per bushel, advanced to 5/6d during the second week of the month and was firm at 5/9d for the remainder of the period. Northern Rivers crops are now almost exhausted but it is expected that shipments from the Illawarra districts will soon commence. The sixteen trucks of choice maize in position at Alexandria were also in firm request. Yellow was quoted at 5/8d to 5/10d per bushel with White at 5/6d.

Very few oats were offered to Sydney buyers. Moderate quantities arrived from Tasmania but were all taken for milling purposes. The 10 trucks of local oats at rail were of varied quality and prices ranged from 3/6<sup>1</sup>/<sub>2</sub>d to 4/- per bushel accordingly.

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Imports of dried fruit of all varieties into the United Kingdom in 1936 totalled 167,600 tons, and were 13,300 tons, or 7 per cent., less than in the preceding year. This figure is considerably lower than the average of the period since the War, the decline being due to smaller imports of currants and dried tree fruits.

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

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Reports issued by the various Departments of Agriculture revealed that at the end of September approximately 1,143,000 cases of apples were held in cool storage in the principal apple producing States of the Commonwealth, this total being made up as follows:- New South Wales 176,272, Victoria 630,000, Tasmania 221,000 and South Australia 115,847. Weekly shipments to the Sydney market from Tasmania during the month of October, however, averaged only approximately 20,000 cases, while consignments from Victoria were only moderate in comparison to the large stock held in cool storage. French Crabs, Sturmer Pippins and Democrats comprised the bulk of the Tasmanian shipments and selected sizes of these varieties, if of choice quality, moved out fairly well during the early part of the month. Small and inferior fruit, however, was practically unsaleable and was offered at low prices in an endeavour to effect clearances. Owing to the prevalence of breakdown in later shipments, particularly in French Crabs and Sturmer Pippins, buyers turned their attention more and more to New South Wales grown Granny Smith. By the end of the month, this was the only variety to sell at all freely and values appreciated by about 1/-, best lines realising to 11/- per case. Good quality local Delicious also met a steady demand and up to 17/- per case was obtained for some extra choice lots; many brands, however, were showing the effects of long storage and had to be disposed of at reduced rates. Yates was the principal variety coming forward from Victoria, special grades meeting a steady demand at prices ranging to 9/- per case.

Only a few pears were available and Victoria was again the main source of supply. There was ready sale for choice, sound fruit at satisfactory rates but lines showing any sign of breakdown had to be cleared regardless of price.

Only limited quantities of main crop Navel oranges were available, the end of the season having been reached. Choice sold readily, realising as high as 12/- per case. Considerable quantities of second crop fruit came to hand, but this, with the exception of a few odd brands, lacked quality and was very difficult to sell. Ample supplies of grapefruit were forthcoming and, while demand for the most part was somewhat dull, quality fruit realised satisfactory prices, some sales being recorded to 12/- per case. The season being well advanced, main crop mandarins generally had so depreciated in quality as to be almost unsaleable and were superseded by second crop fruit of superior grade, the best sizes of which moved out freely at rates ranging to 12/- per case. Lemons were plentiful, but other than choice medium sized "cured" were not in request and agents had difficulty in clearing stocks, even at the nominal prices ruling. At the end of the month there was an improvement in the market and a further advance in prices was anticipated during the month of November. Fairly heavy supplies

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of Valencia oranges came to hand, principally from Coastal areas, and the sizes most suitable for retail purposes moved out well, the general range of prices being from 6/- to 9/- per case. Only limited consignments came forward from the Irrigation Area as growers in that locality were preparing for the export of large numbers of cases to New Zealand when the embargo was lifted early in November. It is anticipated, however, that when export does commence, substantial quantities of fruit rejected as not being up to export standard will be placed on the Sydney market.

Small parcels of cherries came to hand from the Lakesland and Camden districts during the third week of the month, and the quality for so early in the season was very good. Early consignments of choice fruit realised from 12/- to 15/- per quarter-case but subsequently values receded, from 7/- to 9/- being obtained when supplies became more plentiful. Considerable quantities were received from the Young district towards the close of the month; while clearances were satisfactory, lower prices were accepted as the Lakesland-Camden fruit was of better quality.

The first apricots of the season were received from the Kurrajong district. The first of the best quality fruit to reach the market was packed in quarter-cases and realised to 6/-, but as supplies increased the standard half-bushel case was used and closing quotations were 5/- to 8/6.

Arrivals of bananas for the month showed a slight decrease on September figures, the total being 29,130 as compared with 30,600 for the preceding month. Generally, demand was quiet but the rates ruling at the end of September were well maintained with closing values showing a slight improvement for "eights" and "nines".

Supplies of pineapples totalling approximately 15,200 tropical cases for the month showed a decrease of about 3,000 cases. The quality on the whole was satisfactory; the sizes were mostly those in general demand and the standard of maturity varied sufficiently to meet all requirements. Stocks moved out steadily throughout the month and prices showed an upward trend during the last fortnight, closing rates showing an improvement of about 2/- per tropical case.

Consignments of papaws from Queensland increased steadily throughout the period, rising from 450 cases during the first week to 660 during the last. Values showed a gradual downward tendency as supplies increased, closing quotations being about 2/- lower at 10/- to 12/- per tropical case.

Supplies of local strawberries increased steadily while Queensland supplies declined and ceased altogether about the third week of October. Locals met a steady demand, ruling prices being

/ 8/- .....



8/- to 12/- per dozen punnets with some sales of extra choice berries at higher rates.

Large quantities of tomatoes came to hand from Queensland, the peak being reached during the week ended 22nd October when consignments aggregated approximately 25,000 half-cases. This was followed by upwards of 24,000 the following week and the total arrivals for the month exceeded 81,000 half-cases. Only small quantities arrived from the Coffs Harbour district at the beginning of the month but by the end weekly consignments amounted to about 8,000 half-cases, with a grand total for the period of 13,100. Daily supplies from local glasshouses were also considerable but stocks were well within normal requirements. Very satisfactory prices were ruling at the beginning of October, quotations during the first week being as follows:- Queensland 9/- to 12/-, repacked 12/- to 16/-, Local Glasshouse 10/- to 16/-, Hothouse 16/- to 20/- per half-case, while the first Coffs Harbour consignments sold at prices ranging from 10/- to 18/- per half-case. These high values were not maintained, however, a downward trend taking place as supplies increased. During the last week rain was experienced on the principal selling days; this restricted demand considerably and prices were reduced all round in an endeavour to stimulate sales.

Beans continued to come forward from Queensland and the Northern Rivers of this State but in much smaller quantities. Quality was lacking owing to the dry weather and, although stocks were offered at low rates, agents were unable to effect clearances. Moderate quantities of very good quality from the Gosford-Tuggerah district came forward early in the period and cleared readily at the satisfactory prices of 6/- to 9/- per bushel. Supplies quickly increased, however, and values showed a corresponding decline. At the end of the month, with the advent of warmer weather, plentiful stocks were available and sellers were forced to reduce values to low levels to effect disposals, closing quotations being from 1/- to 3/6 per bushel.

Peas were heavily supplied throughout. Increasing quantities from the Irrigation Area and the Central Western Slopes came to hand to supplement the ample supplies from districts in closer proximity to Sydney. The bulk of the surplus stocks was purchased by canneries and this stabilised the market to a considerable extent but prices realised were by no means high, the ruling rates for choice lines fluctuating between 3/6 and 5/- per bushel.

Stocks of cabbages were ample to meet all requirements and moved out steadily at prices ranging from 2/- to 5/- with some extra choice at higher rates. Moderate supplies of cauliflowers came to hand but met only a limited demand. Prices, however, were very satisfactory, up to 9/- per dozen being obtained for the best quality lots.

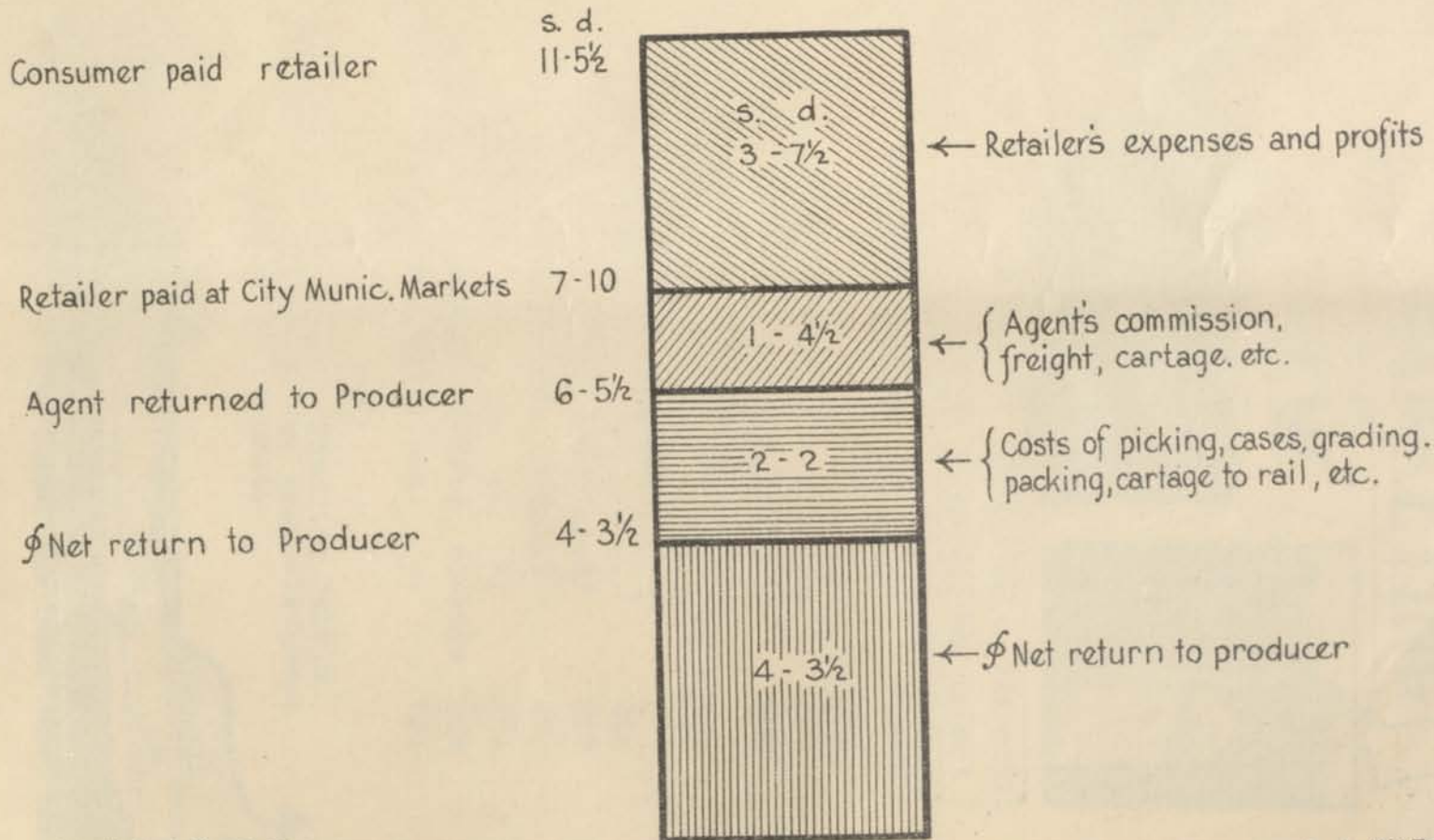


(Navel,- Choice 100-163) **ORANGES** (Per. Bushel Case)

"SPREAD" BETWEEN THE RETURN TO THE PRODUCER  
AND THE PRICE PAID BY THE CONSUMER

SEASON,- MAY TO AUGUST 1937.

37.1261



204

Compiled - J.H. 1.11.37  
Drawn - J.H. 2.11.37  
Checked - C.K. 2.11.37

⌘ Costs of production should be deducted from this return.

A. A. WATSON.  
DIRECTOR OF MARKETING