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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.

IV.

The British Marketing Acts.

The form and extent of the powers of the English and Scottish Marketing Boards are set forth, as to basic legislative provision, in The Agricultural Marketing Acts, 1931 and 1933. What follows is a brief resume of those Acts.

A scheme relating to the marketing of an agricultural product of Great Britain may be submitted by any persons who satisfy the Minister that they are substantially representative of the persons who produce that product in the area to which the scheme is applicable. Before approving a scheme the Minister shall invite objections and representations with respect to it, allowing not less than six weeks for this purpose.

After considering any objection made, the Minister may direct a public inquiry by a competent and impartial person at the cost of the Government. If the Minister be eventually satisfied that the scheme (with or without modifications) will conduce to more efficient production and marketing, he may, after consultation with the Board of Trade, submit a draft of the scheme he approves to Parliament and if each House approve such scheme, it shall come into force on a date specified in the order.

Every scheme shall provide for the registration of any producer who makes application for that purpose and shall constitute a board to administer the scheme which shall be composed of elected representatives of registered producers.

Then follows (within a time specified in the Scheme) a poll of the registered producers on the question whether the scheme shall remain in force. If a majority be polled in favour
/of

The British Marketing Acts (Contd.)

of the scheme equal to two-thirds of the votes that could have been cast and, if such majority of votes be cast by registered producers capable of producing not less than two-thirds of the product which all the registered producers voting are capable of producing, then the scheme comes into operation at the expiration of a suspensory period. Provided, further, that if it be proved to the satisfaction of the Minister at any time before the expiry of the 'suspensory period' that the number of producers voting on the poll was less than half the total number (excluding those exempted or entitled to be exempted under the Scheme) he shall forthwith, by order, revoke the scheme.

By 'suspensory period' mentioned in previous paragraph is meant a period beginning on the date when the scheme is approved and ending at the expiration of such period (not being less than one month or more than two months).

If it be decided as the result of the poll that the scheme shall remain in force, every producer who is not registered or exempted from registration will be prohibited from selling the product concerned.

A scheme may provide for (inter alia)

(a) empowering the Board to buy the product, to produce such commodities from that product as may be specified in the scheme, and to sell, grade, pack, store, adapt for sale, insure, advertise and transport the product and any commodity so produced by the Board;

(b) requiring producers to sell the product only to or through the agency of the Board;

(c) requiring registered producers to furnish to the Board such estimates, returns, accounts and other information as the Board may consider necessary;

(d) enabling the Board to encourage agricultural co-operation, research and education.

Any producer who sells the product in contravention of the provisions of the scheme shall be liable on summary conviction to a fine not exceeding £5, or, on conviction on indictment, to a fine not exceeding £200 and, in either case, to an additional fine not exceeding half the price at which the product was sold.

There is provision in the Act for the appointment by the Minister of two Committees for Great Britain, England and Scotland, respectively, viz., a Consumers' Committee and a Committee of Investigation.

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The British Marketing Acts (Contd.)

A Consumers' Committee is charged with the duty of considering and reporting to the Minister on the effect of any scheme on consumers and any complaint made to the Committee as to the effect of any such scheme on consumers.

A Committee of Investigation shall, if the Minister so directs, report to the Minister on any report made by a Consumers' Committee and any complaint made as to the operation of a scheme which, in the opinion of the Minister, could not (in terms of the Act) be referred to a Consumers' Committee.

If a Committee of Investigation reports that any provision of a scheme, or any act of omission of a Board administering a scheme is contrary to the interests of consumers, the Minister may (after consultation with the Board of Trade) amend the Scheme or may, by order, revoke it or may order the Board to rectify the matter, subject, however, to the necessity for submission of the Minister's proposal to both Houses of Parliament and to the power of Parliament to annul such proposal and subject, further, to the Minister giving the Board concerned notice of the action he proposes taking and considering any representations which the Board, within fourteen days of such notice, may make.

Some explanation is necessary of what is meant by 'contrary to the interests of consumers' (see previous paragraph). The Act makes the very interesting provision that "in considering whether any person represents the interests of consumers of any product, or whether any provision of a scheme or any act or omission of the Board administering a scheme is contrary to the interests of consumers regard shall be had to the interests of persons who purchase the product, or commodities produced wholly or partly therefrom, for their own consumption or use and not to the interests of persons who purchase the product, or such commodities as aforesaid, for the purpose of any trade or industry carried on by them."

For the purpose of making loans to Boards administering schemes under the Act, there is provision for the establishment and maintenance of "The Agricultural Marketing Fund", an English fund administered by the Minister for Agriculture and Fisheries and "The Agricultural Marketing (Scotland) Fund administered by the Scottish Department of Agriculture, under the control and direction of the Secretary of State for Scotland.

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The British Marketing Acts (Contd.)

Yet another provision of the Act which cannot be omitted from these notes is one which empowers the Minister to constitute one or more Agricultural Marketing Reorganisation Commissions for Great Britain, England or Scotland, charged with the duty of preparing in accordance with the Act schemes for regulating the marketing of such agricultural products as the Minister may direct.

For the purposes of this particular series of notes, it is not necessary to review the Act of 1933 in detail, though it may well have attention in another series. Part I deals with the Regulation of Importation of Agricultural Products and Sales of Home-produced Agricultural Products, Part II with Development Schemes for Organising the Production of Secondary Agricultural Products and Part III with Amendments of the Act of 1931.

Part I of the Act of 1933 links-up with the Act of 1931 in its first section. It provides that the Board of Trade, after consultation with the Minister for Agriculture and Fisheries and with the Secretaries of State concerned with agriculture in Scotland and Northern Ireland, respectively, may make an order regulating the importation into the United Kingdom of any such agricultural product as may be specified in the order, provided it appears that those in whose interests the order is made have taken all such steps as are practicable and necessary for the efficient reorganisation, by means of agricultural marketing schemes "or schemes under this Act" of their industry.

Another provision of Part I to which reference may be made here, is that empowering the Minister to appoint a Market Supply Committee "to review generally the circumstances affecting the supply of agricultural products in the United Kingdom and to make recommendations as to any steps which ought, in the opinion of the Committee, to be taken for regulating that supply...."

Part II of the Act of 1933 also makes contact with the Act of 1931 in its first section, which provides that the Boards respectively administering two or more agricultural marketing schemes may submit for approval by the appropriate Minister a development scheme for organising in connection with the said marketing schemes "the production of that secondary product to which any of the said agricultural marketing schemes applies." Ministerial approval is subject to submission to and approval by Parliament.

The British Marketing Acts (Contd.)

A development scheme under Part II may require that no person shall produce the secondary product in premises in an area to which a related marketing scheme applies, unless he is exempt from registration under the marketing scheme, or unless he holds in respect of those premises a producer's license issued by a Development Board. The object of a producer's license is efficient production and reducing or preventing excessive production. Drastic penalties are provided for production in contravention of a development scheme.

It is provided that the secondary products to which Part II applies are bacon (including hams) and any agricultural product wholly or partly manufactured or derived from another agricultural product covered by an order in force under the Act of 1933.

The amendments of the principal Act of 1931, as set forth in Part III of the Act of 1933, though important, call for no particular reference in this series of notes beyond mention of the fact that provision is made for the inclusion in the membership of a Board administering a marketing scheme of two persons co-opted by the Board, after consultation with the Market Supply Committee.

Regarding the matter of co-opting Board members, the Act of 1933 states (inter alia) that "every person co-opted to a Board shall be a person who, in the opinion of the persons co-opting him, is specially qualified for membership of the Board by reason of his commercial or financial ability". This provision savours of that in the New South Wales Act for inclusion in the membership of a Marketing Board of not more than two Government nominees.

Part IV of the Act of 1933 commences with an interesting provision for the sale of eggs by weight or under grade designation. For the rest its miscellaneous and supplementary provisions require no comment here. A second amending Agricultural Marketing Act was passed in 1953. It is a very short measure, the provisions of which need not be reviewed in this series of notes.

A.A.W.

(To be continued).

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CORRECTION: In "Notes on Marketing Organisation", on page 180 of the November issue the word 'banned' appearing in Line 5 of the last paragraph should read 'bound'.

THE CALIFORNIAN AGRICULTURAL PRORATE ACT AND ITS OPERATION.

The Agricultural Prorate Act was passed by the Legislature of California in 1933, with a view to providing machinery for controlled orderly marketing of agricultural products.

For some years prior to 1933, the producers of the bulk of the more important agricultural crops in California had encountered difficulties in the way of satisfactory marketing. These problems were due to the seasonal or annual surpluses which at some time or another during the marketing period glutted the markets, thus rendering it impossible for producers to obtain reasonable returns. Under conditions where surpluses were available and there was no marketing control, the competition between growers to dispose of their perishable and semi-perishable crops tended to depress all prices to low levels, and it was found difficult, if not well-nigh impossible, to restore them to a reasonable basis during the marketing season.

Co-operative marketing organisations have filled a prominent position in the distribution of Californian crops, more especially since 1923. These organisations have as one of their primary objects the orderly marketing of the products of their members and their efforts have shown that market stability and improved price levels accrue from orderly marketing. It has also been demonstrated that failure to include in a marketing programme even a relatively small proportion of the production available for marketing at any one time tends to nullify orderly marketing endeavours.

This experience led, in the years just prior to the passage of the Prorate Act in 1933, to a number of efforts being made with various crops to include all of the production in individual marketing programmes and it was demonstrated that eminently satisfactory results in the way of market stabilisation could be obtained when entire crops were sent to market under controlled orderly marketing. These schemes entailed voluntary support only. It was found that all production could not be held under the control of a voluntary programme and that all growers could not be expected to continue voluntary adherence as the extra profits accruing to deserters from the scheme invariably appealed to the greed of a sufficient number of producers to cause programmes of a voluntary character to break down.

The conclusion arrived at in the light of the foregoing experience was that it was useless to set in operation schemes based on support by all, or even nearly all producers, unless the means could be found to compel adherence to such a scheme once it was put into effect. The Agricultural Prorate Act is deemed to be a means whereby that purpose can be accomplished and is said to be a logical outcome of an experience of over ten years in which there
/was...

was evolved a sound method to solve the problem of agricultural surpluses for Californian farmers.

Proration has been defined "as the arbitrary allocation, on a proportionate basis, of the available market among the interested producers with a curtailment of marketings to correspond with existing adequate demand". The Act is designed to afford the producers of any agricultural commodity the opportunity of coming under a marketing control scheme which will save them the losses often sustained in marketing products that sell at prices which do not return cost of production. The regulation of the marketing of the entire flow of a given commodity is contemplated, thus avoiding gluts and famines and assuring stabilised prices. The Act applies to producers of perishable or semi-perishable crops in which a surplus exists at some time during the marketing season with the exception of commodities which meet substantial marketing competition from other States. In passing, it may be said that the Act authorises control of a crop only when it is ready to market and then only to the extent necessary to insure its orderly movement to market. Such control does not include price fixing.

The first step towards the establishment of a proration zone is for the producers concerned to present a petition. All districts in California producing the crop to be prorated and marketing it in a substantial volume at the same time are included in the same zone. A district need not be included unless marketing competition is furnished. Under the Statute no programme can be initiated for any crop except at the instance of at least two-thirds of the producers of the crop having at least 51% of such crop and then only after the Agricultural Prorate Commission (a body appointed under the Act for its administration) is satisfied upon certain points, including the following:-

- (1) that the economical stability of the agricultural industry concerned either is imperilled or is about to be imperilled by prevailing market conditions
- (2) that agricultural waste is occurring or about to occur, the waste being defined as the waste occurring in harvesting, packing and shipping that portion of crops for which no demand exists at reasonable prices
- (3) that the institution of a prorated marketing programme will conserve the agricultural wealth of California and prevent economic waste
- (4) that the programme will advance the public welfare without injustice to any producer
- (5) that the commodity in question cannot be marketed at a reasonable profit other than by means of the programme.

/Upon...

Upon the institution of a proration programme in a marketing zone, the Agricultural Prorate Commission selects a programme committee consisting of seven members, five of whom are producers and two handlers operating in the zone. If any marketing agency handles more than one-fifth of the production it is entitled to name such proportion of the producer-members of the committee as the production it controls is of the total production, with a limit of three. In actual practice it would appear that subject to statutory safeguards for the protection of the public against unreasonable prices, and to the requirement that all producers be treated impartially, the producers, through the committee largely of their choice, administer the marketing programmes. The programme committee determines the method, manner and extent of proration and may modify the programme at any time with the approval of the Commission. The programmes vary in their features according to the character of the commodity concerned and the marketing practices prevailing in its distribution. Where crops are harvested and marketed over a limited period of time, the marketing season is divided into proration periods of from one to two weeks. The production of each grower which will be available during any one proration period is determined by actual check or by estimates. The programme committee decides what available markets will absorb in the same period at prices returning to producers their costs of production plus, at times, a small profit. If the market is unable to absorb available supplies, the percentage of curtailment is arrived at and applied to the production of each grower, and each is permitted to market the same percentage of his available production. The same method is applied to production which is sold annually en masse. A percentage of curtailment is fixed and the marketings of each producer are restricted in the same proportion. The quantity which is so curtailed is held for subsequent introduction into marketing channels or diverted for use in other directions.

It may be mentioned here that no programme may be imposed upon growers nor can it be continued after 40% of the producers with 40% of the production, petition for its termination.

(To be continued).

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The pastoral outlook in New South Wales at the close of October was fairly satisfactory, except for the Western half of the State. During November some good falls of rain occurred on the Coast and Tablelands, and parts of the Slopes and North Central Plain also benefited. In each of these divisions, except where grasshoppers have denuded pastures, the position, in the main, is fairly good. The Riverina, Central Plain and Western Divisions, except for scattered storms experienced a dry spell; feed dried off rapidly and the position, in a number of districts, will become serious unless rain occurs at a very early date. Apart from some of the less favoured districts, where surplus supplies are becoming depleted, available water is adequate for present requirements.

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THE ORGANISATION OF THE MEAT INDUSTRY FOR
MARKETING PURPOSES.

The pastoral industry in New South Wales, ever since its modest beginnings in the early days of settlement, has bulked largely, not only as the main rural activity but as the chief source of the national wealth. With the development which has taken place with the passage of years we have reached the stage where about 90% of the area of the State utilised for the principal forms of primary production is devoted to grazing.

The following figures which have been extracted from the Commonwealth Quarterly Summary of Statistics shows the present distribution of cattle, sheep and pigs in the Commonwealth.

STATE	CATTLE	SHEEP	PIGS
New South Wales	3,388,538	55,300,000	436,944
Victoria	2,091,246	17,663,103	314,301
Queensland	6,033,004	20,125,000	304,888
South Australia	335,354	7,900,000	93,458
Western Australia	882,761	9,024,758	98,026
Tasmania	270,035	2,000,000	45,163
Northern Territory	900,535	25,000	555
Fed.Capital Territory	10,186	243,669	629
Total Australia	13,911,659	112,281,530	1,293,964

It is of interest to note that New South Wales has more sheep and pigs than any other State and is only exceeded by Queensland in the number of cattle.

Only slightly over 1,000,000 sheep are grazed in the Coastal belt of New South Wales as the climatic conditions are not very favourable for sheep raising. The Tablelands carry over 12 million, the Western Slopes over 16, the Central Plains and Riverina between 16 and 17 and the Western Division approximately 7 million. Although by far the greater percentage of sheep in this State is raised primarily for wool, substantial numbers are slaughtered, the total being over $6\frac{3}{4}$ millions in the year ended 31st March, 1935. Of the cattle, about one-third of the total is kept for dairying and is largely depastured in Coastal districts; the other two-thirds are raised for slaughtering and are distributed in the following manner:- approximately one-third in the Coastal area, one-quarter each in the Tablelands and Western Slopes Division, with nearly 350,000 in the Central Plains and Riverina and almost 90,000 in the Western Division. Most of the pigs are raised in conjunction with /dairying...

dairying and are killed for consumption as pork or bacon. It will be seen, therefore, that the meat industry of New South Wales is very important and of considerable dimensions.

The slaughter of live stock for sale as food, either for local consumption or for export, is permitted only in places licensed for the purpose, in accordance with the Cattle Slaughtering Act 1902. In country towns, licensed slaughter houses are inspected by a local officer appointed and controlled by the local Government authorities. In Newcastle, the second City of the State, public abattoirs were established in 1912 under the control of a Board elected by the Councils of the local areas in the district.

In the Metropolitan area of Sydney, the bulk of the stock is slaughtered at the State abattoirs at Homebush Bay, situated on the Parramatta River, about 8 miles to the west of the City. Cattle sold at the Homebush Sale Yards (in close proximity to the Abattoirs) are inspected in the Yards by a Meat Commission's Inspector before being offered for sale and those showing signs of disease are marked as "suspects" and receive special attention at the Abattoirs. Sheep and lambs are not subject to any inspection other than that which takes place after slaughter. There is a staff of inspectors at the State Abattoirs, and Inspectors are also stationed at the Sydney Meat Preserving Company's and the Riverstone Meat Company's Works at Auburn and Riverstone, respectively. In the case of small privately owned slaughter houses in the County of Cumberland outside the Metropolitan Area, Meat Commission's Inspectors attend on the days slaughtering takes place and inspect all animals killed. The operations of the Inspectorial Staff are supervised by the Veterinary Officers of the Metropolitan Meat Industry Commission, who pay regular visits to the different establishments.

The following summary shows the distribution of slaughtering operations in New South Wales in the year ended 31st March, 1935. For the purposes of classification in this table the term "Abattoirs" relates to establishments in which 100,000 or more sheep were slaughtered.

District and Establishments	Sheep	Lambs	Cattle			
			Bullocks	Cows	Calves	Pigs
State Abattoirs	1,736,256	1,281,535	126,070	78,584	137,758	158,260
Other Abattoirs	540,982	779,289	35,427	10,677	15,128	22,582
Balance of County						
Cumberland ..	25,511	3,304	1,662	2,658	1,059	45,553
Total, Cumberland	2,302,749	2,064,128	163,159	91,919	153,945	226,395
Country Abattoirs	217,291	132,167	34,757	22,960	18,962	31,145
"Slaughter Houses	878,254	114,485	138,466	129,150	193,559	233,141
Stations & Farms	1,039,136	61,898	12,841	7,446	4,273	14,378
Total, Country	2,134,681	308,550	186,064	159,556	216,794	278,664
Grand Total ..	4,437,430	2,372,678	349,223	251,475	370,739	505,059

/The number...

The number of licensed slaughterhouses in New South Wales at 31st March, 1935, was 1,186.

The slaughter of stock and the sale of meat in the County of Cumberland, which contains the Metropolitan Area, are under the control of the Metropolitan Meat Industry Commissioner, who is appointed by the Governor. The greater proportion of the live stock intended for killing is forwarded from country districts by rail to Flemington (or Homebush as it is usually referred to), in the case of sheep or cattle, or to the Homebush Abattoir Saleyards in the case of pigs and calves, for sale by auction by various selling agents. The carcass butchers purchase the animals on the hoof and deliver them to the Commission for slaughter at the State Abattoirs. In passing, it must not be overlooked that considerable numbers of stock purchased in the country are brought down for slaughter at the Abattoirs without passing through the Homebush Saleyards. Following delivery, the stock are killed and treated by the staff of the Abattoirs, and, after chilling, the carcasses are delivered to the owners early in the following morning. There is a distributing depot at Pyrmont on the Darling Harbour railway line, but the bulk of the meat now passes through the new Meat Hall at the Abattoirs. Delivery of meat for local consumption is from the Depots mentioned to retail butchers, mostly per medium of motor vans. The Abattoirs have a scale of charges covering the costs involved, whilst for frozen meat there are additional fees for freezing, wrapping, storage and delivery to ship's side.

Thomas Sutcliffe Mort of Sydney, New South Wales, who experimented in the shipping of cured meat to England as early as 1843, returned to this phase of his many-sided activities in 1870, when he began a series of experiments in freezing and thawing meat with a view to repeating his earlier attempt to send it to England. He chartered the first steamer for the frozen meat trade in about 1875 and although this shipment involved Mort in very heavy loss his work in this direction paved the way for the success achieved in 1878. The meat export trade did not assume its present importance in New South Wales until towards the end of the nineteenth century, when the provision of refrigerated space in steamers made it possible to send frozen meat overseas. Since then, although it has been subject to vicissitudes, this trade, embracing both frozen and canned meats, has grown considerably. Most of the large modern steamers visiting the ports of New South Wales have refrigerated space provided, whilst a number of vessels have been specially equipped for the carrying of chilled cargoes. During 1932 a system was evolved whereby chilled meat might be kept long enough to permit transport from Australia to the English consumer, and this has enabled Australia to compete on a more equal footing in the more profitable chilled meat trade which had previously been monopolised by South American suppliers.

(To be continued)

C.K.

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

Considerations of space precluded the publication of this article in its entirety in the November issue. In continuation, the following is largely given over to a discussion of the various acts, etc. which have been passed to provide for the proper control and management of the different ports of the State.

There is quite a number of small vessels operating along the coast of New South Wales which, as well as carrying general cargo, transport considerable quantities of farm and dairy produce, fruit and timber from the North and South Coast ports of the State. The interstate vessels, as their name implies, trade largely between Sydney and Newcastle in New South Wales and the capital cities of the other States of the Commonwealth; cargoes are mostly of a miscellaneous nature, but there are times when they are comprised almost entirely of fruit and vegetables, chiefly apples and potatoes. Reference in this instance is made particularly to those vessels trading between Tasmania and Sydney and to a somewhat lesser degree between Sydney and Melbourne.

The Federal Parliament is empowered under the Commonwealth Constitution to make laws relating to trade and commerce with other countries and among the States, which includes navigation and shipping as well as such matters as lighthouses, lightships, beacons, buoys and quarantine. The Federal Navigation Act (1912-35) contains inter alia, special legislation in regard to navigation and shipping. The provisions of the Act apply to all ships registered in Australia as well as to those vessels of British ownership on round voyages to or from Australia. It is also necessary for all vessels engaged in the coastal trade to be licensed.

Since 1901 and up to February, 1936, the State Department of Navigation exercised control in an administrative capacity over all ports in New South Wales, excluding Sydney, as well as administering the Harbour and Tonnage Rates Act (1920) which authorised the collection of harbour and tonnage rates at all ports other than Sydney, the control of this port being vested in the Sydney Harbour Trust. The Maritime Services Act, 1935, which came into operation on the 1st February, 1936, transferred the powers and functions of the State Department of Navigation and the Sydney Harbour Trust to the Maritime Services Board of New South Wales. The personnel of the Board consists of five commissioners, appointed by the Government, of whom two, representing shipping and commercial interests, devote only part of their time to the Board's work. The Act also provides for an Advisory Committee, which has been appointed and comprises five members, all Governmental appointees. The function of the Committee is to advise the Board in all matters relating to the Port of Newcastle. The Chairman of the Committee is nominated by the Maritime Services Board and the other four members are representative of interests relating to the administration of the port. /In...

In New South Wales certain charges, known as port charges, payable in respect of ship's cargoes and shipping are imposed by the Commonwealth Government under the provisions of the Lighthouse Act and the Federal Navigation Act, and by the State Government under the Navigation Act of New South Wales, the Harbour and Tonnage Rates Act and the Sydney Harbour Trust Acts. The State enactments are administered by the Maritime Services Board of New South Wales. Under Federal Legislation the principal charges levied are light dues, fees for the survey of ships and the adjustment of compasses. Commonwealth light dues are required to be paid in respect of every ship entering any port in Australia and are payable quarterly at the rate of 9d per ton net. The payment of these dues at any one port enables a vessel to enter any other port or ports without incurring additional fees during a period of three months. In the case of those vessels only calling at one port in Australia en route to an overseas destination, the charge is 5d per ton net, although provision is made whereby a proportion of the light dues may be refunded if a vessel is laid up for a period of at least one month. To ensure the safety of sea-borne goods and passengers, the Federal Navigation Act requires that all sea-going vessels must be surveyed at least once in every 12 months and it is an offence for any vessel to put to sea without a survey certificate, issued by the Federal Department of Navigation or some other approved certificate. All fees for the survey of vessels and for the compass adjustment are collected by the Federal authorities and paid over to licensed marine surveyors and compass adjusters. The amount of fees payable for a 12 months' certificate vary in respect of the class, type and tonnage of the vessel, being approximately from £4 for boats up to 100 tons burden with proportionately higher rates for larger vessels; the fee for sailing ships, however, is relatively lower. Rates payable for compass adjustment range from £2.2.0 to £7.7.0. The New South Wales Government also imposes a harbour and light rate of 4d. per ton net, payable half-yearly.

In addition, the Maritime Services Board of New South Wales imposes pilotage rates on all vessels entering or clearing a port in the State, where pilot stations are established, the charge being 1½d per ton (net) on arrival and on departure for ships in ballast, arriving for refitting or docking, or proceeding to a port for provisions, pleasure, repairs, coal or through heavy weather or in the case of distress. Vessels which do not come within the above category are charged at the rate of 2½d per ton net on arrival and on departure, the maximum charge in the case of the ports of Sydney and Newcastle being £25 and the minimum £3; at all other ports the minimum charge is £1.10.0. Vessels, of course, whose master holds a pilot's certificate and those employed in the whaling trade are exempt unless a pilot is actually engaged.

As well as the above charges in respect of pilotage, vessels in port and moved from one place to another in any port are required to pay harbour removal dues at rates varying from £1 to £4.10.0, the size of the vessel being the chief factor in determining the amount of dues to be paid.

/Tonnage...

Tonnage rates are payable during the stay in port of all vessels over 240 tons which are berthed at a wharf, the charge being 3/16d per ton gross, for each period of six hours. In the case of vessels under 240 tons there is a charge made in Sydney Harbour known as a berthing charge, the amount levied being from 1/- to 10/- according to passenger capacity, and is payable by vessels engaged in picnic excursion or passenger traffic; other vessels pay at the rate of 2/6d to 10/- per day. In all other ports berthing charges are computed at the rate of 2/6d for each period of six hours. In the case of those companies who lease wharves in the port of Sydney, relevant tonnage rates and berthing charges as accrued are paid in conjunction with the rental of the wharves.

Apart from the charges made against shipowners of which brief reference has previously been made, owners of goods landed or shipped at Sydney are required to pay inward and outward harbour and wharfage rates. It is not possible to deal fully with all such rates and they have only been briefly outlined in this instance. The inward rate in Sydney Harbour is usually 4/- per ton charged either by weight or measurement (i.e. 40 cubic feet to the ton); outward rates are usually 1/0 per ton, but in both instances there is a number of special rates which apply to certain commodities, some of which are coal, wheat, wool and timber. Ports other than Sydney also have separate charges, which differ in respect of coastwise and interstate goods and goods to or from overseas, the inwards rates payable being 2/- per ton for local and interstate goods and 4/- per ton for overseas goods, while the outward rate is 1/- per ton unless otherwise directed by the authorities.

Finally, in dealing with the usual shipping charges, it should not be overlooked that cargo placed on any wharf in Sydney Harbour is subject to storage and shed charges if not removed within certain specified periods. An exception to the rule is made in the case of certain wharves in Darling Harbour, where virtually free storage is given to potatoes by the lessees of those wharves. The charges for inwards cargo are 4d. per ton per day during the first week, 5d. for the second week, 6d. for the third week and 7d. for each succeeding week. Goods for shipment are charged at the rate of 1d. per ton per day. The scale of charges at other ports in New South Wales vary and range from 2d. to 6d. per ton per day. The amount usually paid in the nature of shed charges is 1/10d per square foot of floor space occupied.

In conclusion it might be said that to ensure the safety of vessels navigating the coastline of New South Wales, some 25 lighthouses as well as other warning and navigation lights have been erected, and are controlled by the Commonwealth Government.

THE WHEAT GROWING INDUSTRY OF
NEW SOUTH WALES.

In the articles which have appeared in the last two issues on this subject, attention has been devoted principally to the early history and development of the industry and in continuing this series it is most desirable that emphasis should be laid on the importance of wheatgrowing in the general economy of the State. This involves two main considerations (a) employment and (b) the benefits accruing to the State from the circulation of money received in payment of wheat and wheat products exported.

In dealing with (a) it is pointed out the number of holdings on which wheat is now grown in New South Wales is approximately 17,000. On some holdings more than one farmer operates e.g. in the case of sharefarming. On the other hand, in some instances one grower conducts wheatgrowing operations on more than one holding. It is estimated that in this State about 20,000 persons are engaged in growing wheat. If, however, we take into account the members of the families of married growers who are permanently employed on wheat farms the figure quoted would be increased very considerably. Apart from wheatgrowers and their families the industry provides employment for a large number of men throughout the sowing and harvesting periods and this is particularly apparent at harvest time. Not only is labour required for harvesting but available employment embraces bag-sewers, carters, silo and stack hands, receiving agents and their assistants, railwaymen, weighbridge operators, etc. Additional work is also provided in the city of Sydney in receiving wheat from the country, unloading into stacks and silos and in loading into ships for export. Then again the maintenance and repairing of railway rolling stock and the transport of goods such as bags, duplicates, tractor fuel etc., provides another avenue of employment.

Whilst it is very difficult to secure any accurate figures as to the numbers of persons the wheat growing industry so employs there is no doubt that many thousands are thus engaged. To give an illustration of the far reaching effect of the extension of the industry in a country district the figures relating to a particular Shire in the South Western portion of the State may with advantage be quoted. In 1922 the population of the Shire referred to was 6,570 and of the Municipality which it embraced 786, a total of 7,356. In 1936 the population of the Shire and Municipality totalled 12,580. The principal industries are wheat and sheep. No material change has occurred in sheep but in 1922 the area under wheat was 235,000 acres and in 1936 469,000 acres, an increase of 234,000. The increase in population was 5,224. Assuming that the increase in population is wholly attributable to the influence of wheat, each increase of about 45 acres represented an increase of one person. It will, of course, be understood that this may not apply generally and that this figure would include not only those engaged in wheat
/production...

production but also those who would secure a livelihood indirectly such as business men, tradesmen and others. At the same time a clear indication is obtained of the value of the industry from an employment viewpoint.

As regards (b) if we examine statistics covering the value of exports of wheat and flour we find that the annual average in respect of the five years 1932/33 to 1936/37 was £5,345,514 for New South Wales and £18,649,408 for Australia. It will be remembered that during the greater part of this period the price of wheat was comparatively low, the Government Statistician's yearly average for bagged wheat (Sydney basis) being as under:-

1932	..	..	3/0 ³ / ₄ d	per bushel.
1933	..	..	2/10 ¹ / ₂ d	" "
1934	..	..	2/8 ¹ / ₂ d	" "
1935	..	..	3/2 ¹ / ₂ d	" "
1936	..	..	3/7 ¹ / ₂ d	" "

It will thus be seen that with normal harvests and with overseas prices at their present level the new wealth entering this State and the Commonwealth would considerably exceed the average for the five year period previously quoted.

It is not only the farmer who derives advantage from the money thus received but the whole community benefits. The money circulates through the various channels of trade and commerce and its influence is felt by all sections. The farmer is able to meet at least some of his commitments and to increase his purchases of manufactured goods which are the production of our secondary industries. This results in additional employment and so increases the spending power. Any circumstances which arise to reduce the value of wheat exports therefore has a direct bearing on the prosperity of the State. Governments have recognised this fact and during periods of low prices have provided financial assistance to the industry. Criticism has on occasions been levelled against the granting of such aid, but it has to be remembered that the condition of the industry which rendered assistance necessary was not due to inefficiency on the part of those engaged in it but to circumstances entirely beyond their control. The simple fact is that the wheat market is influenced by overseas parity and during the seasons 1931/32 to 1935/36 when financial help was given the markets throughout the world were in a depressed condition and many farmers throughout the State and the Commonwealth would have found it impossible to have continued in the industry at the prices then obtaining had they not been helped by the Government. Particulars of the amounts made available to the industry and the method of payment will be included in the January issue.

The accompanying schedule gives details of production in New South Wales and Australia between 1901 and 1936/37.

W H E A T.

Production - New South Wales and Australia.

Year	New South Wales	Australia
	Bushels	Bushels
1900-01	16,173,771	48,353,402
1901-02	14,808,705	38,561,619
1902-03	1,585,097	12,378,068
1903-04	27,334,141	74,149,634
1904-05	16,464,415	54,535,582
1905-06	20,737,200	68,520,772
1906-07	21,817,938	66,421,359
1907-08	9,155,884	44,655,673
1908-09	15,483,276	62,590,996
1909-10	28,532,029	90,413,597
1910-11	27,913,547	95,111,933
1911-12	25,080,111	71,636,347
1912-13	32,466,506	91,981,070
1913-14	37,996,068	103,344,132
1914-15	12,812,803	24,892,402
1915-16	66,726,459	179,065,703
1916-17	36,585,380	152,420,189
1917-18	37,704,626	114,733,584
1918-19	18,324,640	75,638,262
1919-20	4,387,209	45,974,992
1920-21	55,610,993	145,873,050
1921-22	42,759,389	129,088,806
1922-23	28,660,824	109,454,842
1923-24	33,171,300	124,993,271
1924-25	59,752,435	164,558,734
1925-26	33,000,619	114,504,392
1926-27	47,373,713	160,761,886
1927-28	27,042,000	118,199,775
1928-29	49,257,000	159,679,421
1929-30	34,407,000	126,884,622
1930-31	65,877,000	213,594,391
1931-32	54,966,000	190,612,188
1932-33	78,870,000	213,926,981
1933-34	57,057,000	177,337,803
1934-35	48,678,000	133,393,232
1935-36	48,822,000	144,217,769
1936-37 (a)	54,837,000	150,468,321

(a) Subject to revision.

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

IMPROVED DEMAND FOR SHEEP AND LAMBS, BUT
CATTLE EASIER - HOMEBUSH SALEYARDS, SYDNEY

The unsettled state of the meat trade during October, which adversely affected the numbers of sheep and lambs coming forward for sale, was in no way reflected in activities throughout November. The pennings on each sale day were consistently high and the month's total of 413,878, comprising 211,203 sheep and 202,675 lambs was 169,162 head more than during October and substantially in excess of the aggregate for the month of November last year.

With skin values one of the determining factors in price realisations both for mutton and lamb and the actual return to the producer, it might justifiably be assumed that with the skin market falling steadily rates for sheep and lambs at the Homebush Saleyards would also be adversely affected. Competition during the month as a whole, however, was particularly good and the strong demand resulted in better prices for practically all grades of sheep and lambs, even though lower skin values ruled. Although rates were not so high as the extreme of last month, they were much better than those ruling at the close of October. Sheep and lambs were making almost as much per head as they were in November of last year, but with the lower values for skins, mutton and lamb prices were for the most part considerably higher.

The condition and class of the sheep and lambs yarded were not the best, due to a large degree to the shortage of feed in quite a number of stock raising centres. The grown sheep "forward for sale" included all grades of mutton, with fair to plain wethers and ewes preponderating. Buyers often found it difficult to secure mutton to meet the requirements of their particular trade. There was a good supply of prime heavy mutton, comprising wethers and ewes over 50 lb. dressed weight, but good quality lines for the hot weather trade, ranging from 38 lb. to 44 lb. dressed weight, were at all times rather hard to obtain. There were plenty of sheep of these weights yarded, but they were hard and dry and included aged ewes and 8 tooth wethers not very well suited to trade needs. Sheep showing quality were eagerly sought after and rates for mutton advanced from $\frac{1}{2}$ d to $\frac{3}{4}$ d per lb. for the greater part of the month, the peak prices being $3\frac{1}{2}$ d for wethers and $3\frac{1}{2}$ d per lb. for ewes; these values, however, were not fully maintained and the closing sales were marked by an easier tendency, mutton being from $\frac{1}{2}$ d to $\frac{3}{4}$ d per lb. cheaper, wethers selling to $3\frac{1}{2}$ d and ewes to $3\frac{1}{2}$ d per lb. During the month some of the best wethers yarded sold at 23/-, but on the average good wethers cost from 15/- to 20/- per head, while ewes sold at from 12/- to 17/- for the better grades. Fair to plain sheep sold at from 6/- per head and in places made little better than 1d per lb.

The supply of lambs was heavy and, as is usual at this time of the year, suckers comprised by far the largest part of the pennings in this section; old lambs and hoggets were only yarded in limited numbers. Choice suckers were rather scarce, but plain and /dry...

dry lambs could be found in large numbers and but little better than fair trade quality. The offering of really good trade lambs, which were nicely finished and carrying fair condition was not at any time in excess of requirements. Good export lambs, which were by no means heavily supplied, met with a very strong demand, competition from those buyers engaged in the overseas trade being particularly active.

Having due regard to the class of lambs offering and the lower values obtaining for skins, prices were satisfactory, good export and trade suckers selling at 6d. to 6½d per lb. for the greater part of the month and appreciating by ½d to 6½d per lb. during closing sales. Fair to good sucker lamb cost from 5½d to 6d, while plain suckers mostly sold in the vicinity of 5d to 5½d per lb. on the hoof. The market for hoggets remained fairly constant throughout but rates showed a tendency to harden at the end of November, buyers paying from 4d to 4½d per lb. for this class of meat.

During the month an outstanding draft of suckers realised 28/- per head, but values for the most part ranged from 20/- to 25/- for the best lambs, with other grades at correspondingly lower levels.

The scarcity of young veal owing to a dispute among the calf slaughtermen at the Homebush Abattoirs tended to create a much better demand for lamb in the retail trade.

Apart from the usual trade interests who operate at the Homebush Saleyards, restockers were active, a fair number of suitable sheep being disposed of for purposes other than slaughter.

The market throughout was largely in sellers' favour and while skins have not been making entirely pleasing prices, the actual return to the grazier on the whole should prove satisfactory.

November yardings of cattle showed considerable variation in the numbers forwarded, but the grand total 31,231 was 5,000 head more than that of the previous month. The usual heavy supply of store stock was available, while a small number of Queensland cattle was on offer at various times throughout the period.

Early in the month some rather fine examples of fat stock well-suited to the trade were included and a fairly big proportion of cattle of good appearance, although not prime, was represented. For the remainder of the month the majority of cattle offered generally was plain. Among these very plain and inferior grades were several drafts of young calves which were disposed of for a few shillings per head.

Stock owners perhaps are inclined to take the view that since a really good market has been obtaining for the past few months there is no reason why they should risk holding cattle that are not
/"fat"...

"fat" when their value at the moment is fairly high. The trend of the market, particularly during November, however, has indicated that with so many plain descriptions continually coming forward, rates must eventually fall to a low level and affect values of the better class of cattle.

The bullocks and steers available in the period under review were chiefly light to medium weight; in fact, only very small numbers of a heavy description were noticed, but as the demand at this time of the year centres around the lighter weights, the absence of the heavier cattle was not greatly felt. Among the really prime and attractive lines offered, Shorthorns and Herefords were the breeds figuring most prominently; a draft of the former of weights very suitable for the trade and of a very high standard of quality, sold at an average of £14.18.0 per head. The beef on the hoof in this instance was worth close to 43/- per 100 lb. Later in the month, when values had receded somewhat, an attractive draft of Hereford bullocks and steers from the South-west of the State made from 40/- to 42/- per 100 lb. They met with strong competition and rates realised were well above average.

From the middle of the month to the end the demand for cow beef fell off almost completely. Among the reasons ascribed were the large numbers of old cows available and the almost entire absence of any suitable lines. By way of contrast, representative sales on 11th November were recorded to as high as 38/- per 100 lb. of beef but subsequently agents had difficulty in disposing of cows of the same weight at 30/- per 100 lb.

Heifers, vealers and yearlings continued scarce both as regards number and quality. Values for the most part were low for the inferior descriptions but those showing any condition usually met with a brisk demand and very high rates were paid in many instances.

Considerable irregularities and fluctuations in the market were evident throughout the period, the general lack of quality of the stock and the inconsistency of supplies being contributing factors. There was a fairly steady upward trend during the earlier part of November followed by a quick fall at the end of the month. However, rates for the better class of stock at least were, with a few exceptions about on a par with those ruling at the beginning of November.

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The Elgin Gas Corporation Ltd. which has been conducting experiments in the transport of fruit, etc. overseas by a gas preserving process advises that a further shipment has been forwarded to London by the s.s. "Brisbane Star". The shipment consists of eggs, pineapples, cherries, plums, peaches and apricots. Considerable interest attaches to the tests thus being made as it is claimed by the Company that the gas process is much cheaper than ordinary refrigeration.

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

The market for potatoes in Sydney during November was a very uncertain one at all times and considerable fluctuations were apparent. These were caused by the variations in the quantities of the periodical arrivals and by changes in the weather. A feature was the steady increase in the quantities of new season's potatoes coming forward. At the Alexandria Railway Goods Yard, rail offerings included 7,376 bags of new and 6,626 of old season's tubers. At the beginning of the month, a strong demand ruled for new and values ranged from £6.3.4 to £9.1.8 per ton. A collapse in the market, however, was in evidence about the middle of the month and some quotations, even for passable quality, were as low as £3.0.0 per ton. A slight recovery took place towards the close and £5.10.0 to £6.15.0 was obtainable. Old season's tubers realised from £1.5.0 to £4.3.4 and, contrary to the position during October, were in poor request. Only one truck of Victorian old potatoes was available and it brought £3.5.0 per ton.

In Sussex Street, the sources of supply varied considerably. Shipments from Tasmania totalled 53,853 bags; the greater portion of which was received during the first fortnight. These were augmented by approximately 2,000 bags from Victoria and, early in the month, a dull market ruled. Quotations were as follow:- Tasmanian: (Old) Brownells £6.0.0; Snowflakes £3.0.0 to £4.0.0; Arranchiefs £2.0.0 to £4.0.0. Victorian: Snowflakes (Old) £4.0.0 to £4.10.0 per ton. Towards the close, a few new season's Tasmanian Bismarcks were on offer and these cleared rapidly at £7.0.0 to £9.0.0 per ton. Western Australian Delawares were well to the fore during November and the 4,520 bags available were well within the requirements of the trade. They were much in demand for country orders because of their keeping qualities and brought from £6.0.0 to £9.0.0 per ton. The balance of the potatoes on the Sussex Street market was composed of approximately 12,500 bags of new from the Northern Rivers. A very unstable demand was apparent for these supplies and realisations were highest around the middle of the month. The market opened at £4.0.0 per ton but, due to a temporary shortage it soon advanced to £8.10.0. With the arrival of the new Bismarcks, however, values depreciated for locals and £4.0.0 to £4.10.0 became the general market range.

Generally speaking, throughout the month of November the offering of onions in Sydney was far in excess of trade needs. Victorian shipments amounting to 3,050 bags were much smaller but the shortage was more than made up by the heavy arrivals from Queensland. Prices for Victorian Brown onions were as high as £12.0.0 per ton early but later £8.0.0 was difficult to obtain. White were in light supply and realised £11.0.0 per ton. The 7,000 bags received from Queensland were of varied quality and prices presented a wide range. Quotations for Brown and White at the commencement of the month were £12.0.0 and £11.0.0 per ton,

/respectively, ...

respectively, but subsequently rates for both declined to £5.0.0. This was attributed to the consistency of supplies and the general decline in quality consequent upon the lateness of the season. At rail, local onions were well represented, approximately 5,300 bags being received. Quotations, which fluctuated considerably, ranged as follow:- Brown £5.10.0 to £8.0.0, White £5.0.0 to £11.0.0. Pickling onions of both varieties realised from £7.0.0 to £9.0.0 per ton.

Queensland pumpkins completely dominated the market during the period under review and a very firm demand was in evidence. Consignments by sea amounted to 5,350 bags, the bulk being new season's. Rapid clearances took place, old being quoted at £5.10.0 to £10.0.0 per ton and new at £9.0.0 to £12.0.0. Rail offerings at Alexandria totalled 57 trucks. The market opened at £5.0.0 but soon advanced to range from £8.10.0 to £10.0.0, according to quality.

Tasmanian old season's swedes were scarce, only 33 bags being received. These were disposed of at £4.0.0 per ton. The last small consignments of old Carrots and Parsnips also arrived during the first week of the month. Carrots were quoted at £10.0.0 per ton but no definite rate ruled for Parsnips. New swedes, however, were not long in making an appearance and, before the month closed, 1,115 bags had been marketed. These were very immature, however, and realised from £2.0.0 to £6.0.0 per ton.

Arrivals of local oaten chaff at Alexandria totalled 171 trucks. Generally, this supply was enough for buyers' needs. The market remained at the lower level which ruled at the close of October, prices varying between £5.0.0 and £6.10.0 per ton. Demand was more restricted than in the previous month. Only 1,100 bags arrived from Tasmania and an indifferent inquiry ruled. It was the low realisations, which ranged from £4.15.0 to £5.10.0 per ton, which finally effected a cessation of deliveries. The 48 trucks of wheaten chaff at rail were again difficult to clear and only choice lines met with any appreciable request. These realised from £6.0.0 to £6.5.0 per ton, with sales of inferior and medium at £4.5.0 to £5.15.0.

A steady improvement in the market for local lucerne chaff at Alexandria was a feature of November trading in forage. A smaller supply, totalling 85 trucks, was available and, although values were far below those of early October, they were generally more satisfactory than those at the latter end of the same period. For choice lines, agents were able readily to obtain from £6.0.0 to £7.0.0 per ton, whilst even inferior sold steadily at £4.5.0 to £5.10.0. Considerable variations, however, were apparent in the request for lucerne hay. Rail consignments from the Maitland district comprised 114 trucks for which there was a wide range of prices. Generally £2.0.0 to £4.10.0 per ton was quoted but a few special lines in small bales cleared briskly at as high as £5.10.0.

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The lowest price quoted in the above range ruled during one or two periods of over-supply and was not the result of inferior quality. Mature hay from numerous other centres, but mainly from Mudgee, totalled 75 trucks. Inquiry was fairly satisfactory and quotations ranged from £4.0.0 to £7.0.0 per ton, although choice seldom brought less than £6.10.0.

Despite a heavier stock of Victorian oaten hay in Sussex Street, agents were able to maintain values as an improved demand operated. Shipments amounted to 190 bales, which moved out well each week at the firm rate of £9.10.0 per ton. Large quantities of local oaten hay were railed to Alexandria and mostly passed into store. No prices were disclosed but it is understood that they were based on the Sussex Street quotation.

The firmer tendency which was apparent in respect of Tasmanian straw during October continued during the period under review. Supplies which totalled 7,600 bales were much more extensive but the increase in competition resulted in firmer rates. Quotations ranged from £4.10.0 to £4.15.0 per ton, although the latter rate was more general. Twelve trucks were yarded at Alexandria, a considerable portion of which was forwarded from Victoria. From £4.0.0 to £5.0.0 per ton was received, according to quality.

The month of November marked the introduction of new season's wheat to Alexandria. Consignments, which totalled 119 trucks, were more than treble those received during October. Early in the period, 5/6d per bushel was the ruling rate, but the market eased in sympathy with the general decline in overseas and local quotations. Demand, however, was quite satisfactory and 4/5d to 4/11d was obtained throughout the remainder of the month.

Stocks of maize on the Sydney market included 2,600 bags from the Northern Rivers and 712 from the Illawarra district. Most of the former supply was released from stores on the North Coast and arrived unexpectedly. The market, which opened at 5/9d per bushel soon depreciated to 4/9d for both Yellow and White. Inquiry was constant but larger arrivals were instrumental in reducing competition. The consignment from the South Coast was the first to be received from that area this season. It was due largely to the weaker market ruling for Northern Rivers stocks that larger offerings were not forthcoming from the Southern parts of the State. Quotations ranged from 5/6d per bushel early to 4/9d towards the close.

Most of the 26 trucks of oats railed to Alexandria was taken into store. A good demand ruled for the balance and 2/9d to 3/9d per bushel was obtainable.

FRUIT AND VEGETABLES - TRADING AT THE CITY MUNICIPAL
MARKETS - SYDNEY.

The wet weather conditions which prevailed during the early part of the month when precipitations of varying intensity were an almost daily occurrence had a retarding effect on sales of fruit generally and resulted in a downward trend in the values of many lines. Later in the month the seasonal "slump" was experienced and trading at closing was rather dull, practically all kinds of fruits being affected. During the first part of the period the earlier varieties of cherries came to hand in large quantities principally from the Young and Orange districts, and as the bulk of the supplies arrived in a bruised condition owing to the heavy winds experienced in the producing areas sales were difficult to effect even at low rates. The market improved considerably when supplies of the earlier sorts began to wane and more abundant stocks of the better quality later varieties such as St. Margaret and Florence were available, choice lines realising very satisfactory prices. During the last week, however, a weakening demand resulted in a decline in values.

Early apricots from local districts showed the effects of excessive rain which detracted from their keeping quality and made it imperative for agents to clear stocks as quickly as possible regardless of price. During the latter half of the month considerable quantities were received from the Irrigation Area but demand was confined principally to large choice descriptions and small fruit which constituted the bulk of the supplies became increasingly difficult to clear and resulted in a large amount of wastage. Plums met a similar experience - the earlier sorts such as Early Jewel soon gave place to Wilson's Seedling which sold fairly freely when first available but with increasing supplies stocks began to accumulate and small fruit became practically unsaleable particularly as factories ceased buying operations on the City Markets. Later Santa Rosa and Shiro became the predominating varieties on the market and as supplies were lighter and the general quality much superior to the earlier lines an improvement in values was apparent, but small fruit was still difficult to clear and continued to cause vendors some concern.

Peaches made their appearance on the market during the second week of the month but the first arrivals were rather immature for ready sale. Better quality fruit came to hand later, at first in small quantities, and very satisfactory prices were obtained, odd sales to 15/- per half-case being reported. A gradual downward trend in rates was apparent, however, as supplies increased until towards the end of the month such large quantities were forthcoming that agents found it impossible to clear stocks of small or poorly coloured descriptions, retailers limiting their purchases /principally...

principally to large fruit of choice quality. As "brown rot" fungus was prevalent in many brands the loss from this cause was considerable, not only in peaches but also in plums and apricots; but cherries this season, so far at any rate, have been particularly free.

Some interesting comments were made by the Sydney representative of the Queensland Committee of Direction of Fruit Marketing on wastage and seasonal values, which, with the author's permission are being included in this article in their entirety for the information of readers. He states -

"At this time of the year there invariably occurs a slump in values for all fruits, the principal contributing factor being the presence on the market of plentiful supplies of plums, peaches, apricots and cherries. This influx occurs at a time when the great majority are "saving up" for Christmas gifts, which of late is tending to become a more expensive business, resultant upon the extensive advertising by those who sell such articles. Previously, the only effective method the seller of fruit could utilize, was to reduce prices in order to sell this article in the face of competition from other sources.

The week just past is the first of what may be termed the period of general waste. Stocks of fruit of all descriptions can be seen any day, rapidly becoming masses of fermenting pulp. In the words of a commentator in the local press, "Cases of plums, carefully grown and packed are sent to market to become in a few days, merely cases of decaying fruit awaiting a condemnation certificate and conveyance to the rubbish tip." These comments could be applied to almost every variety of fruit on the market.

In the same article the question is asked, "Is the product in the shop being as eagerly sought and consumed as in the years gone by?" The answer as far as the writer of this report can see is -- No. The reason for the answer is possibly visionary and embraces apparently unconnected circumstances. Fruit is a necessary article in the diet of a child. Normally, it could be presumed that a youngster would eat twice as much fruit as a grown up but there are far less children now compared with a generation ago. The declining birth rate has been too widely discussed for any to be ignorant of its general effects, but this is one in particular. Less (fresh) fruit is eaten (proportionately).

Then again, the whole world is constantly changing and progressing in many respects, consequently, we who make it, must have our attention attracted to something new all the while. Has the actual appearance and taste of fruit been changed in the last 100 years? In one respect only. It /has...

has been put into bottles and cans. The result -- More and more fruit is preserved every year and there is a decided swing from the fresh article to the canned. It would be ridiculous to suggest that fruit will ever entirely lose its identity, but think it over. This is the age of "something new", or rather "something old in a new form", coupled with the greatest sales factor in the world to-day -- advertising."

Generally speaking the public demand for apples was on the wane throughout the month a preference being shown for the increasing quantities and varieties of summer fruits available. Sales during the early part of the month when stone fruits were not plentiful were very satisfactory particularly for local Granny Smiths of Extra Fancy and Fancy grades, the popular sizes realising to 15/- per case with odd sales of special quality fruit at higher rates. Towards the end of the month most brands were showing discoloration of the skin - the effects of the long period for which they were held in cool storage - and had to be cleared as quickly as possible regardless of price. This and the seasonal preference for summer fruits referred to earlier in this article, had a depressing effect on the market generally and was responsible for the decline in values of the relatively small percentage of good quality fruit available. The same remarks could be applied to local Delicious and in fact to practically all varieties, with perhaps the exception of Democrats which contrary to other lines showed a slight improvement towards the end of the month owing to it being practically the only coloured apple of any quality obtainable. Prices of other coloured varieties, if choice, were satisfactory but the quality generally was very indifferent. Fairly extensive consignments were received from Victoria while weekly shipments from Tasmania varied between 14,000 and 21,000 cases, and consisted chiefly of Democrats and Sturmers. The latter variety was difficult to sell unless of large size and outstanding quality, in fact small fruit was practically unsaleable and accumulated stocks were apparent in any part of the market where Tasmanian apples are handled.

The season for main crop Navel oranges had practically finished at the end of October, considerable quantities of second crop fruit however came to hand throughout November, but was practically unsaleable and was offered for as low as 1/- per case to effect clearances. The export of Valencia oranges to New Zealand commenced at the beginning of the month under review, and it was reported that growers in the Irrigation Area from which export consignments were drawn were offered from 15/- to 17/- per case, f.o.r., for their best quality fruit. Only limited quantities were therefore received on the Sydney market from that quarter until about the middle of the month when ample supplies were forthcoming from both inland and coastal districts. Heavy rain in coastal areas during the early part of the month delayed harvesting operations with the result that only small consignments reached the city markets during the...

the first fortnight and values were relatively high, the popular sizes realising to 10/- per case. The continued wet weather also had the effect of producing black spot to a considerable extent in many coastal crops thus reducing the quality of a large proportion of the heavy supplies available towards the end of the month to plain grade. This class of fruit was difficult to clear and had a depressing effect on the market generally; buyers confined their activities to selected sizes of choice quality fruit and allowed plain grade descriptions to accumulate.

Supplies of bananas were a good deal heavier than for sometime, total arrivals for the month being in the vicinity of 50,000 cases of which about 33,000 were from New South Wales and 12,000 from Queensland. Rain and the abundant supplies of summer fruits restricted demand and prices were gradually eased down owing to the necessity of preventing, as far as possible, the accumulation of ripe fruit.

Peas and beans, with odd exceptions when rain interfered with harvesting, were heavily supplied, but only a relatively small proportion was of choice quality. Choice peas met a steady demand and a gradual upward trend in values was apparent, closing quotations being recorded to 10/- per bushel. Medium and inferior descriptions, however, were difficult to sell but the position was relieved considerably by buyers operating on behalf of canneries purchasing the greater proportion of the surplus stocks. Values of choice beans improved early in the month but the large quantities of inferior quality descriptions on offer had a depressing effect on the market and by the middle of the month values had fallen to low levels and failed to recover to any appreciable extent.

Cabbages were fairly plentiful throughout the month, and were generally speaking of very good quality. Demand for the most part was quiet but rates remained nominally steady at 1/- to 4/- per dozen.

Lettuce were heavily supplied during the greater part of the period under review but only a comparatively small percentage was of choice quality, small and inferior descriptions predominating. Wet weather retarded sales and adversely affected values early in the month but with the advent of warmer weather conditions stocks moved out more freely with a corresponding improvement in prices.

Large quantities of tomatoes came to hand from the North Coast and local districts and were supplemented during the first three weeks by fairly heavy consignments from Queensland. Supplies from local glasshouses gradually fell away, the season being practically finished by the end of the month. This, however, was more than balanced by the increasing quantities of outdoor descriptions which arrived. During the first fortnight values declined but advanced for choice lines towards the end of the month.

A.4.

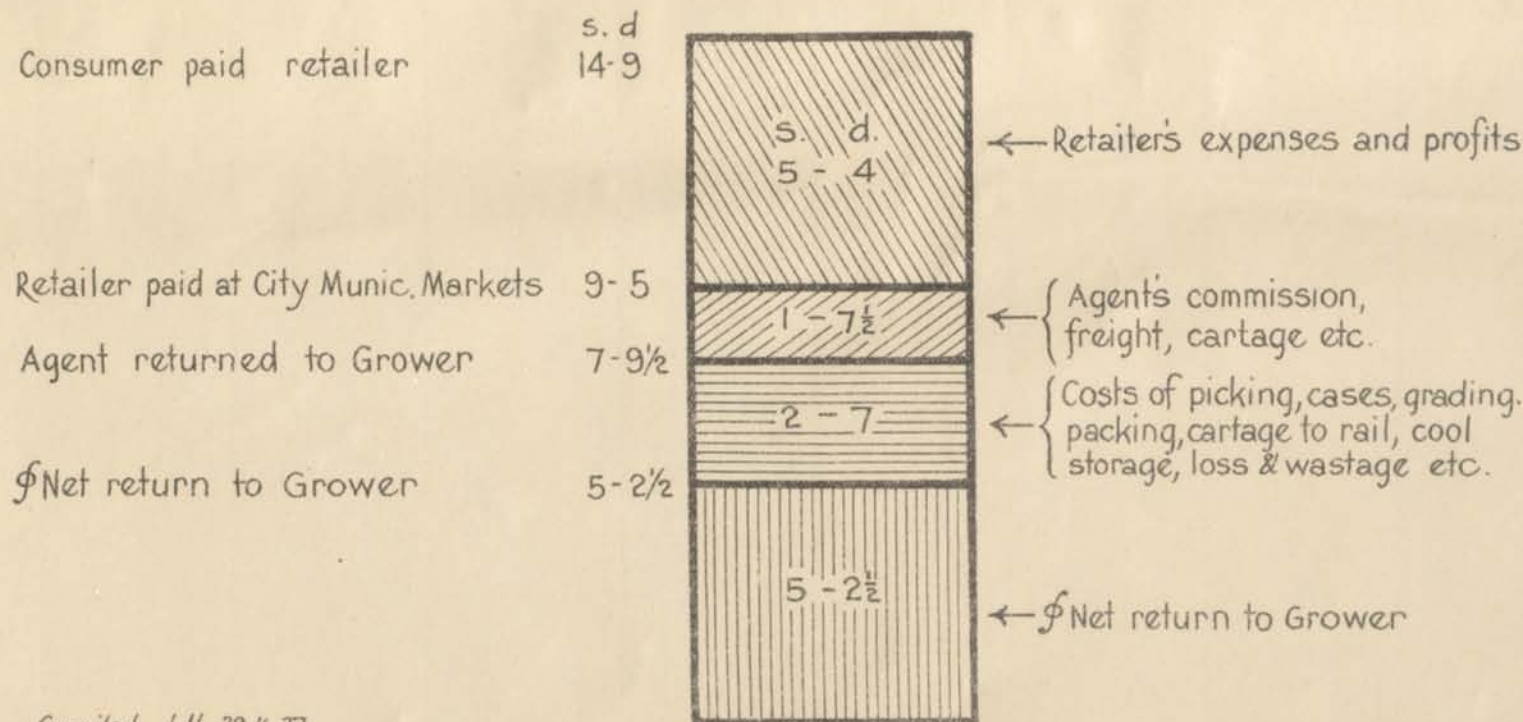
STATE MARKETING BUREAU-DEPT OF AGRICULTURE N.S.W.

(2 $\frac{3}{4}$ " Extra Fancy & Fancy) **APPLES** (Per Bushel Case)
GRANNY SMITH

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

SEASON, - NOVEMBER 1936 to OCTOBER 1937

37.1373



Compiled - J.H. 29.II.37
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⌘ Costs of production should be deducted
 from this return.

A. A. WATSON,
 DIRECTOR OF MARKETING