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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.

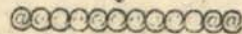
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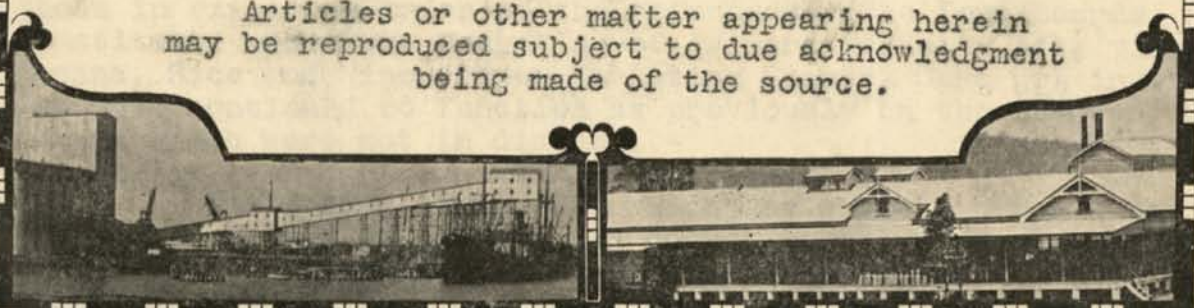
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MONTHLY MARKETING REVIEW.

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.

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REVIEW, BY DIRECTOR OF MARKETING, OF DEVELOPMENTS  
DURING 1937.

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History will record the year 1937 as a memorable one in the annals of Australian marketing. Among events and developments of note to all Australian primary producers must be mentioned the defeat of the Federal Government's referendum proposals on marketing and the expiry and temporary continuance of the Ottawa Agreement. Of deep interest in New South Wales, particularly, have been the building of a new Vegetable Market by the City Council of Sydney - now nearly completed, partially occupied and easily the finest market building in Australasia -, a further partial lifting of the New Zealand embargo on Australian citrus fruits, the inauguration and suspension of tri-weekly in lieu of bi-weekly sales of cattle and sheep in the Metropolitan sale yards at Homebush, the adoption of the chain system of slaughtering at the Metropolitan Abattoirs, the election of an entirely new personnel of producers' representatives on the Egg Marketing Board, and last, but not least, the appointment of a Commission of Inquiry into the fruit industry.

The object, so far as marketing was concerned, of the Commonwealth Government's referendum proposals, was an amendment of Section 92 of the Commonwealth Constitution Act to enable statutory control of interstate trade. The most remarkable feature of the result was that a majority of the electors in each and every State negatived the proposal. The final figures for Australia were 1,259,808 in favour and 2,214,388 against. The industries immediately affected by the referendum were the dairying and dried fruits industries. In each case, however, it has been found possible to continue the operation of marketing schemes on similar lines to those in existence prior to the referendum. The four Boards constituted under the Marketing of Primary Products Act, viz., Eggs, Banana, Rice and Wine Grapes Marketing Boards, were not involved and have continued to function as previously on the basis of State powers which were not in dispute.

The Ottawa Agreement, which was operative for a period of five years from 1932, expired in August last but remains in operation pending the trade discussions which will take place in London early this year between the British, American and Dominion Governments.

The erection of a new Vegetable Market at the City Municipal Markets will fulfil a long-felt want. It will not only /enable ....

enable a considerable number of additional growers to secure stands to sell their own vegetables but more space will become available in other buildings for the sale of fruit. The new building and land have involved the City Council in an expenditure of £500,000 approximately. It is expected that the new Vegetable Market will be opened on 1st March, 1938, and that it will provide accommodation for 506 selling stands.

#### TRANSPORT.

On the transport side of marketing, the effect of the advent of the motor truck continues to be seen in marketing from new growing areas made practicable by good roads and swift transport, whilst that from not a few old ones is given new life. At the same time, the efficiency of rail transport is fully maintained and so the lot of the average grower in relation to transport may be said, without exaggeration to have been improved tremendously of late years, by the efforts in connection with both rail and road conveyance.

On the question of the competition between rail and motor truck, the present provisions of the transport statutes in New South Wales appear to be maintaining what may be described, from a marketing point of view, as a reasonably equitable balance. The year under review saw the adoption of amended rail freight charges in respect to wool, livestock, wheat, hay, straw and chaff. These represented, in the main, partial restorations of reductions made during the worst depression years.

An unsatisfactory feature of road transport is that which is seen in the absence of statistics as to quantities of the various kinds of fruit, vegetables and farm produce conveyed in this manner. From both the general statistical and the marketing points of view this is a serious lack. The consignor by rail must fill in a consignment note. The consignor by sea must complete a shipping advice and so it has always been practicable to compile reliable information as to products brought to market by rail and sea. The question arises: Would it be imposing undue hardship upon the motor truck user, if, like his confreres who utilise train and boat, he, too, were required to fill in a consignment note for deposit by the carrier at a convenient point? In this manner, a serious deficiency in necessary information could be rectified.

#### PRICES TRENDS.

Wool. Reviewing the experiences of the various primary industries we find that the value of wool was considerably less than that of 1936 and the clip was also lighter. The average price obtained per lb. of greasy wool from the 1936/37 clip was 16.48d (Sydney basis) as compared with the average of 13.7d per lb. realised for the 530,174 bales which were sold during this season's series of sales ended on 16th December, 1937. The clip is

/estimated ....

estimated at 1,180,000 bales so that approximately only one half has been disposed of and, as there was a hardening tendency towards the close of the December sales, the season's average is likely to be above the present figure. The last wool sale of 1937 closed in an optimistic atmosphere and 10 bales from the Yass district realised the highest price of the season, viz., 28<sup>3</sup>/<sub>4</sub>d per lb.

Wheat. For the greater part of the subject year, the wheat market has been most buoyant and prices have been the highest since pre-depression years. The maximum price recorded for the year was 5/10d per bushel bulk and 5/11d bagged (Sydney) on March 31st and April 6th and 7th. Throughout the ten months January to November the average monthly prices ranged from about 5/- to 5/8d per bushel but during November values declined and on 29th December the lowest price for the year, viz., 4/4<sup>1</sup>/<sub>2</sub>d per bushel (bulk), was quoted.

Beef. Considerable expansion occurred in the export trade in chilled beef, Australian shipments for 1936/37 being 378,624 cwts. compared with 203,300 cwts. for the year 1935/36.

Sheep and Lambs. Values of sheep and lambs sold at the Homebush Saleyards have been for the most part high, though fluctuations naturally occurred from time to time according to the numbers offering, quality, and other contributing factors. Graziers, generally, have not experienced ideal conditions, many districts having been faced with feed shortage owing to dry conditions and prevalence of grasshoppers. Consequently, considerable numbers of sheep and lambs which in normal years would have been held for "finishing off" in better condition were forwarded to the market and could not be regarded as entirely suitable for the requirements of the trade. Nevertheless, prime sucker lambs brought up to 8d per lb., wethers to 5d, ewes to 4<sup>1</sup>/<sub>2</sub>d and hoggets to 5<sup>1</sup>/<sub>2</sub>d per lb. on the hoof. A good conception of the strong position of the market can be gleaned from the fact that sales were made of ewes to 40/-, wethers to 42/- and suckers and old lambs to 37/- per head. A weaker tone in the skin market over the latter part of the year caused a decline of values in the sheep market, but with a stronger demand now in evidence for wool the position should improve.

Cattle. The cattle section was affected similarly to the sheep market in respect of the quality of quite a proportion of cattle offered for sale. Producers, owing to adverse conditions, could not in many instances hold their stock sufficiently long to allow of their being marketed in prime condition. The numbers coming forward were more than ordinarily heavy and the sale on 29th April when 4,879 head were auctioned constituted a record. Market values throughout the year were generally satisfactory from the producers' point of view. From January to mid-July no more than  
/normal .....

normal fluctuations were apparent but after that period a particularly strong upward trend became evident. The price per 100 lb. of beef steadily increased by from 8/- to 14/- above the lowest levels of the year. At several sales even mediocre and plain grades of beef reached surprisingly high rates, but recent prices were more in line with those obtained earlier in the year.

Eggs. Poultry farmers have experienced a very trying year, principally by reason of high feed prices. Wholesale prices of eggs, whilst yielding an average return better than for some years, had not maintained an average proportionate to the increased cost of poultry feed. The total quantity of eggs delivered to the Egg Marketing Board's floors in Sydney and Newcastle during the 1936/37 pool period was 15,147,862 dozens, while producers acting under permit disposed of 5,900,000 dozen direct, making an aggregate total of 21,047,862 dozens, compared with 20,742,413 dozens during 1935/36. The average price of first grade hen eggs from March to July was 1/9d per dozen but a fall in values then took place and in September, October and November the ruling rate was 1/2d. On the 8th December the Egg Marketing Board increased the price of first grade eggs to 1/4d per dozen, which is the highest December price for some years. Prospects for the industry, at this time, are definitely good.

Potatoes. Turning now to farm produce we find that Tasmanian potatoes were at all times more extensively supplied. As a result, prices did not advance sharply as is usual at the end of the season and £6.0.0 per ton was the highest secured, as compared with £19.0.0 realised for Tasmanian Brownells last year. Local old potatoes suffered from the increased competition and, generally, the year was not a good one for local growers. Northern Rivers new stocks were forthcoming in the usual quantities but realisations were lower. Onions were at most times too heavily supplied and a weaker market ruled. In the pumpkin market, Queensland was more substantially represented than in previous years, owing to low prices in that State.

Chaff and Hay. Considerable fluctuations were apparent in forage prices. Periods of drought caused chaff realisations to attain the highest level for several years. Oaten chaff reached £8.5.0 per ton and the market all the year round was firm at about £6.0.0. Wheaten chaff brought £8.0.0 per ton and lucerne chaff, although plentifully stocked, was quoted at £9.0.0 at times with the general level at £6.10.0 to £7.0.0 per ton. The first shipments of Tasmanian oaten chaff for many years were received during 1937. These stocks had a steadying effect on the market and, but for them, prices of local grain chaff would have soared. Lucerne hay sold well at all times and periodical scarcities were apparent. Generally, £7.0.0 per ton was easy to obtain and as high as £10.0.0 was quoted. Soft lucerne hay from Maitland was in particularly strong request because of its comparative cheapness as fodder. The grain market was regulated by overseas quotations

/and ....

and the expectations of our own harvest. New season wheat samples have so far been excellent. Prices of wheat, maize and oats were the highest for several years although the market has settled with the cessation of drought in country districts.

Rice. It is interesting to note that the rice crop on the Murrumbidgee Irrigation Area was a record one, the harvest yielding approximately 42,000 tons of paddy rice. A satisfactory average net return to the grower was secured by the Rice Marketing Board.

Butter. The dairying industry also enjoyed a more prosperous year, weather conditions being generally favourable and production satisfactory. The local wholesale price of butter which had remained constant at 140/- per cwt. since the introduction of the equalisation scheme in 1933 was increased on 20th June last by 1d per lb. to 149/4d per cwt. and cheese rose from 9½d to 10d per lb.

Pigs. The market for pigs has also been very firm, particularly during the last few months, values of all lines showing an increase on last year's figures.

Fruit. Returns from the sale of fruit in the City Municipal Markets varied considerably in comparison with 1936. Values of oranges improved and this also applied to plums and nectarines. Banana prices showed a strong upward movement during the year and each month prices were considerably higher than in 1936. The Banana Marketing Board, which entered its second year of operation towards the end of August, 1937, has effected important changes in the marketing and selling of bananas. In addition to establishing a modern ripening plant and selling floor at Lismore to serve the Northern Tablelands Area, similar facilities are in process of being provided by the Board in the City Municipal Markets for the Metropolitan Area. A selling organisation with ripening facilities has also been opened in Hobart, Tasmania, to which supplies are forwarded direct.

Apples and pears, including such popular varieties as Jonathan and Granny Smith apples and Packham's Triumph and Winter Cole pears were sold at lower levels during the latter months of the year than during the corresponding period of last year. This was due to increased arrivals on the Sydney markets. In addition to heavy Tasmanian supplies, reference to rail consignments recorded in the State Marketing Bureau shows that receipts during the eleven months ended 30th November, 1937, exceeded those for the same period of last year by 212,514 cases of apples and 39,120 cases of pears.

Exports. Perhaps the best indication of the prosperity of the primary industries is obtainable from an examination of the Australian export figures. In 1935/36 the value of our overseas trade was £136,381,221 but in 1936/37 it increased to £160,471,847.

THE CALIFORNIAN AGRICULTURAL PRORATE ACT  
AND ITS OPERATION.

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The December issue contained the first section of an article under this heading and this was devoted principally to a survey of the events leading up to the passing of the Californian Agricultural Prorate Act in 1933 and the main provisions of such Act. In continuation, the following additional information has been prepared and gives particulars of schemes in operation and the benefits resulting to producers therefrom.

Since the Act became effective in 1933, programmes have been put into operation in relation to various commodities, which are set out hereunder together with a brief outline of their history, according to a report by the Agricultural Prorate Commission.

Lettuce Proration Zone No.1	Instituted 23rd January, 1934. Terminated 31st August, 1935 (on petition).	Operated during marketing season during unusually difficult marketing situation.
Lettuce Proration Zone No.2	Instituted 28th April, 1934.	Operated each year since its inception. Most successful.
Apple Proration Zone No.1	Instituted 28th April, 1934.	Prevented from functioning in 1935 owing to unfavourable lower court decision. Resumed operations 1936.
Potato Proration Zone No.1	Instituted 21st May, 1934.	Never operated as market conditions mostly favourable.
Grape Proration Zone No.1	Instituted 17th June, 1934.	Operated in 1934 but not in 1935 owing to uncertain legal position. Resumed activities in 1936.
Artichoke Proration Zone No.1	Instituted 2nd September, 1934.	Never operated as marketing conditions deemed sufficiently favourable.

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/Tomato ....

Tomato Proration Zone No.1	Instituted 16th October, 1934.	Operated in 1934. Inactive 1935 owing to unfavourable Court action. Resumed operations in 1936.
Sweet Potato Proration Zone No.1	Instituted 16th October, 1934.	Operated 1934/35. Operations suspended 1935 unfavourable lower Court decision. Resumed operations 1936/37.
Celery Proration Zone No.1	Instituted 1st November, 1934.	Has operated to advantage each season since.
Milk Proration Zone No.1	Instituted 18th March, 1935.	Began activities in 1935. Unfavourable lower Court decision and discontinued activities when milk was excluded from Act.
Lemon Proration Zone No.1	Instituted 19th April, 1935.	Has not been able to function owing to legal proceed- ings.
Tomato Proration Zone No.2	Instituted 8th November, 1935.	Commenced operations in 1936 season.
Olive Proration Zone No.1	Instituted 21st October, 1936.	Programme formulated for application to 1937 crop.

Reports indicate that in addition to the foregoing products, programmes have been instituted with respect to the marketing of both raisins and prunes and it is said that there is some activity among the growers of pears for canning purposes and rice growers which indicates that they might present petitions to the Commission at an early date for the institution of similar programmes for prorated marketing with respect to those industries.

It has been estimated that the gains to producers coming within the scope of the marketing programmes outlined above aggregated nearly  $3\frac{1}{2}$  million dollars to the end of the 1936/37 season.

The programmes are controlled, financed and enforced through the use of certificates classified as primary and secondary. Each producer is entitled to a primary certificate which must indicate in a general way the quantity of the commodity under proration which he will have for marketing. Under such primary certificates are issued secondary certificates which accompany all deliveries of the commodity and unless this certificate is issued a producer is not allowed to market or even harvest. Both classes of certificates are negotiable between producers and are issued by the zone agent appointed by the committee with the approval of the Commission. This agent administers the proration programme on behalf of the Commission.

The Agricultural Prorate Act contemplated that the Commission set up under the provisions thereof would in time become self-supporting, its support being derived from a percentage (10%) of all funds raised by the various marketing programmes. Subsequently, by amending legislation passed in 1955, the Commission was enabled to collect a maximum of 15%, with power to reduce it, if the revenues received enabled such a course to be taken. The expectations that the Commission would be self-supporting, however, have so far not been realised, as it has been involved in a very considerable amount of litigation. Troubles of this kind are gradually lessening since the constitutionality of the proration method of achieving orderly marketing of agricultural products was sustained by the Supreme Court of California. The decision, which was given on 29th February, 1956, also made it clear that the Act had no other constitutional objections and this has led to a number of programmes, which had remained inactive owing to the uncertain legal position, resuming operations.

The Commission, in reviewing the circumstances surrounding the operations carried on under the Act, reports that there are no indications that the improvement in returns to the farmers of California has resulted in any increase in prices to the consumers. There has been a lessening in the speculative factor, with the result that a number of intermediate agencies between grower and consumer have safely eliminated the allowance usually made to cover speculative risks, thus narrowing the "spread" between producer and consumer. Also, the constant volume of distribution charges and the large proportion they constitute of the price the consumer pays, permits a substantial increase in the producer's share in the cost to the consumer, without materially affecting the price to the latter. Further programmes have been carried out without any waste of products fit for food; crops covered by the Prorate Act have been moved to market in an orderly manner and consumers have not been affected by any temporary curtailments found necessary.

The Commission in its report states that the great majority of producers are heartily in accord with the prorated marketing system of counteracting surpluses. There are some, of  
/course, ...

course, who cannot view the programmes in other than a selfish light and a smaller number who experience difficulty in fitting their usual marketing methods into a common programme, but both these groups are gradually emerging from their difficulties.

Prorated marketing programmes, it is said, have not eliminated any engaged in distributing services. The volume of business available to distributing agencies has been curtailed from time to time by a regulated movement over a longer period and it is also true the speculating gains of such agencies have been seriously affected, but on the other hand, in a number of instances, the aggregate seasonal movement has been materially increased under the influence of trade confidence in stabilised price levels.

The view has been expressed that the Agricultural Prorate Act is a logical progression from methods shown by experience to be inadequate, and is a step in advance, not only as a necessity, but also as a practical remedy for the surplus problem in Californian agriculture.

(To be continued)

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INCREASE IN EGG PRICES.

The Egg Marketing Board has fixed the following prices for the various classes of eggs, to take effect from the 7th January, 1938:-

Hen	1/6d	per	dozen
Medium	1/2d	"	"
Pullet	1/-	"	"
Case	1/2d	"	"
1st Duck	1/3d	"	"
2nd Duck	1/1d	"	"

The prices represent an increase of 2d per dozen in the case of hen eggs and 1d per dozen in respect of medium, pullet and case eggs, while values of duck eggs remained unchanged. The new prices are the highest which have obtained during the month of January since 1930.

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THE ORGANISATION OF THE MEAT INDUSTRY  
FOR MARKETING PURPOSES.

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The first of a series of articles under the above heading appeared in the December issue. In this, the second article, attention is given to the requirements of the Commerce Meat Export Act and Customs Prohibited Exports Act and to the constitution of the Australian Meat Board.

In order to ensure a high standard, special attention is given to the preparation and transport of meat for export. Stringent regulations as to freedom from disease and as to grading have been issued under the Commerce Meat Export Act and Customs Prohibited Exports Act regarding meat intended for shipment overseas and these Regulations are enforced by thoroughly qualified Inspectors. All stock killed for export are examined in a manner similar to those required for local consumption and carcasses which have been in cold storage and are intended for export are re-examined immediately before shipment.

Under the Meat Export Control Act, 1935, an Australian Meat Board was set up consisting of 18 members, including -

- (a) One member in respect of each State and of the Northern Territory, to represent the stock producers, with an additional member in the case of New South Wales to represent Southern Riverina, such members to be appointed on the nomination of the stock producers sections of the Meat Advisory Committees of the various States and Southern Riverina, and in the case of the Northern Territory on the nomination of the Northern Territory Pastoral Lessees' Association.
- (b) One member to represent the pig producers of Australia appointed on the nomination of the Council for the Australian Pig Industry.
- (c) One member in respect of each State which exports more than 15,000 tons of meat annually (at present New South Wales, Victoria and Queensland) to represent meat exporting companies in such States, and appointed on the nomination of the Minister after consultation with the Meat Exporters' Association in each State concerned.
- (d) One member to represent the co-operative organisations of Australia which export mutton and lamb, appointed on the nomination of the Minister.
- (e) Four members to represent publicly-owned abattoirs and freezing works which deal with meat for export from Australia, such members being -

(i) .....

- (i) The Metropolitan Meat Industry Commissioner, N.S.W.;
- (ii) The Chairman of the Queensland Meat Industry Board;
- (iii) The General Manager, Government Produce Department, South Australia;
- (iv) The General Manager, W.A. Government Meatworks, Wyndham.

(f) One member to represent the Commonwealth Government.

Members, other than the Government representative and those specified under (e) above, who hold membership during the pleasure of the Governor-General, are appointed for a period of three years and are eligible for re-appointment.

The Board is empowered to control and regulate the Australian export trade in meat, undertake the advertisement of Australian meat overseas, submit recommendations as to the quality, standards and grading of any particular class of meat intended for export and take any action it considers would lead to the improvement of the quality or the prevention of deterioration, before or during transport, of meat intended for export. It also advises the Commonwealth Government on all matters in connection with any export programme, and, in addition, arranges contracts relating to the shipment and insurance of meat. The Board may conduct directly, or encourage by disbursement of funds, such other activities, experiments or investigations as will tend to the advancement of the meat export industry.

The Act provides for the appointment of a London representative to keep the Board advised as to current prices and other matters relating to the sale of Australian meat in the United Kingdom, and also to represent the Board on the International Meat Conference and the Empire Meat Council, etc. This London representative will also be instructed to inquire into the possibility of finding new markets not served by present deliveries.

The expenses of the Board are met from levies imposed under the Meat Export Charges Act, 1935, on meat exported; exemptions from these levies may be made on the Board's recommendation and such exemptions were made as from 21st May, 1936, in respect of:-

- (1) Any meat exported to any island in the Pacific Ocean situated between the Equator and the 33rd degree of South latitude.
- (2) Meat comprised in any one shipment on which the amount chargeable does not exceed the sum of one shilling.
- (3) Canned meat.
- (4) Meat exported as ships' stores.

The Board controls the export of meat through the issue of licenses, as only a licensee may ship meat overseas, and the regulations under which licences are issued provide that the Board may require the holders to withhold from export the whole or any portion of any meat, meat products or edible offal intended for export, etc.

(To be continued)

C.K.

THE WHEAT-GROWING INDUSTRY OF NEW SOUTH WALES.

As stated in the preceding article on this subject, it is proposed to deal in this issue with the assistance rendered to the wheat industry during the depression years per medium of bounties and other relief payments. The following table sets out the amounts provided by the Commonwealth Government in this connection:-

<u>Amounts paid to Wheat growers as:</u>	<u>Year</u>	<u>N.S.W.</u> £	<u>Total for Australia</u> £
Bounty	1931-32	950,546	3,429,314
Relief	1932-33	570,902	2,000,000
Relief	1933-34	911,094	3,053,000
Bounty	1934-35	531,593	1,462,414
Special Relief	1934-35	100,000	573,250
Relief	1934-35	590,000	2,004,944
Relief (a)	1935-36	565,284	1,078,906
<b>TOTAL:</b>	--	4,219,419	14,401,828

(a) Subject to revision.

The amount made available in respect of the 1931/32 season was distributed by the Commonwealth Government direct and took the form of a bounty at the rate of 4½d per bushel on wheat harvested in Australia during the period 1st October, 1931, and 31st March, 1932, and sold or delivered for sale between 1st October, 1931, and 31st October, 1932.

In the following season, 1932/33, the Commonwealth Government allocated a total of £2,000,000 for relief payments, and this sum was paid to the various State Governments which distributed the money to wheat-growers within their respective boundaries. The New South Wales Government supplemented the Federal grant of £570,902 by an amount of approximately £445,000 from funds collected under the New South Wales Flour Acquisition Act making the total payments in this State £1,015,902. The method of distribution adopted by the New South Wales Government was:-

(a) ½d per bushel on all wheat railed as a contribution towards rail freight.

(b) In addition to (a) payments on an acreage basis as under:-

Area not exceeding 249 acres	4/- per acre.
From 250 acres to 349 "	3/9 " "
" 350 " " 449 "	3/6 " "
" 450 " " 549 "	3/3 " "
Area exceeding 549 acres	3/- " "

/In ....

In the 1933/34 season the Commonwealth Government again utilised the services of the State Governments to make the actual payments to growers and stipulated that the States should apply the sums made available to reducing the cost of production of wheat including the cost of transport and marketing and providing for the needs of individual growers. An important condition on this occasion was that financial assistance must be confined to those growers who did not receive taxable income (Federal) during the financial year ended 1933.

The New South Wales allocation was paid in 2 advances as follows:-

First Advance	..	2/6d	per acre.
Second "	..	1/9 <sup>7</sup> / <sub>8</sub> d	" "

The market value of wheat still being at an unpayable figure in 1934/35, the Commonwealth Parliament again made financial provision for assisting this important export industry. The condition restricting payments to those who had no taxable income was not applied in this instance. Considerable losses were sustained by wheat-growers in the 1934/35 season as a result of adverse weather conditions and the prevalence of grasshoppers, and additional monetary assistance was allocated to the various States to enable special grants in such cases.

In accordance with the recommendations of the Royal Commission on the wheat industry, the assistance in 1934/35 was on the basis of 3d per bushel bounty, supplemented by 3/- per acre on wheat sown to grain, together with the special grants referred to above.

The total sum paid during this (1934/35) season to wheat-growers throughout Australia exceeded £4,000,000.

The Commonwealth Parliament again passed legislation to enable wheat-growers to be assisted in the 1935/36 season. The method of payment was again left to the individual States subject to the proposed method being approved by the Commonwealth Minister for Commerce. The New South Wales share was £565,284 and of this approximately £472,284 was utilised in paying 2/6d per acre to all growers and the balance of £93,000 was distributed on a special unit basis as an additional grant to those who had suffered losses through adverse circumstances.

As a result of an improvement in world wheat values, no bounties or special relief payments of the nature quoted have been made since the 1935/36 season. However, in addition to the assistance previously outlined, the Loan (Farmers' Debt Adjustment) Act, 1935, made provision for £12,000,000 to be made available to the States for the adjustment of farmers' debts. This assistance related not only to wheat-growers but to those engaged in all forms of rural production. Of this amount £10,000,000 was allocated as follows:- New South Wales £3,450,000; Victoria £2,500,000; Queensland £1,150,000; South Australia £1,300,000; Western Australia £1,300,000 and Tasmania £300,000. It was decided that the remaining £2,000,000 was to be allocated in the same proportion but to be subject to review at a later date.



W H E A T.

Gross Value of Production - New South Wales and Australia.  
(at place of production).

Year	New South Wales	Australia
	£	£
1900-01	2,051,297	(a)
1901-02	2,517,480	(a)
1902-03	507,231	(a)
1903-04	3,974,840	(a)
1904-05	2,428,500	(a)
1905-06	2,920,500	(a)
1906-07	2,943,150	(a)
1907-08	1,831,180	9,245,900
1908-09	2,774,000	13,625,253
1909-10	5,111,990	18,048,770
1910-11	4,303,310	16,458,187
1911-12	4,113,400	13,303,326
1912-13	5,238,580	16,645,292
1913-14	5,988,200	18,769,017
1914-15	3,274,450	7,056,808
1915-16	13,352,980	42,042,424
1916-17	7,165,890	34,995,873
1917-18	7,385,140	28,873,208
1918-19	3,538,650	20,299,980
1919-20	2,194,020	20,422,727
1920-21	20,164,060	62,169,360
1921-22	9,077,550	55,154,664
1922-23	6,689,200	20,458,930
1923-24	7,602,840	29,956,055
1924-25	16,684,950	53,547,135
1925-26	8,588,740	35,723,949
1926-27	10,695,500	42,452,792
1927-28	6,197,220	31,895,047
1928-29	9,851,400	38,303,014
1929-30	5,447,770	27,298,848
1930-31	5,215,260	25,047,297
1931-32 (b)	8,130,390	33,728,078
1932-33 (c)	9,858,750	33,315,515
1933-34 (c)	7,013,260	27,896,604
1934-35 (b)(c)	7,149,580	24,737,593
1935-36 (c)	8,137,000	29,768,293

New South Wales figures from N.S.W. Statistical Registers.  
Australian figures from Commonwealth Production Bulletins.

(a) Not available. (b) Including Wheat Bounty. (c) Including Relief  
paid to Wheat-growers.

ADVERSE SEASONAL CONDITIONS AFFECT QUALITY OF STOCK  
AT HOMEBUSH SALEYARDS, SYDNEY.

The unsatisfactory conditions which have prevailed over the greater part of the mutton and lamb producing centres of the State for some time past resulted in a marked falling-off in the general quality of the sheep and lambs offered at the Homebush Saleyards during December. The shortage of feed forced many lines of sheep and lambs on the market which in normal seasons would have been held for fattening. Supplies were particularly heavy, the actual penningings for December totalling 333,365 and, although somewhat less than the previous month's total, exceed the penningings during December, 1936, by 34,156 head.

Despite the heavy yardings which buyers were confronted with on each sale day, values were very satisfactory for the most part.

The grown sheep offered were chiefly only of fair to good trade quality and, while buyers could obtain ample supplies of suitable trade weight mutton, the quality left a lot to be desired. Many lines of sheep were hard and dry and carrying plenty of age and when dressed would not show a very attractive carcass. Really good trade wethers and ewes and those weights required for the export trade were on many occasions difficult to secure. Demand for quality was at all times good, nevertheless values for mutton generally were lower than during the previous month due to a large degree to an improvement in skin values. Some of the best lines of wethers sold realised to 26/- per head and ewes to 20/-. Average values, however, ranged from 15/- to 19/- for good quality wethers and 12/- to 16/- per head for ewes. Many sales of very plain sheep were made at prices ranging from 4/- per head, which gives a very good indication as to the quality of this section of the penningings.

Mutton prices on an average were about  $\frac{1}{2}$ d per lb. lower than those ruling during November, the top rate for wether mutton being  $3\frac{1}{2}$ d per lb. and ewe mutton 3d per lb. on the hoof. Normally, however, wethers cost from  $2\frac{3}{4}$ d to  $3\frac{1}{4}$ d and ewes  $2\frac{1}{2}$ d to  $2\frac{3}{4}$ d per lb., according to weight for the better grades, but other classes sold at correspondingly lower figures.

A feature of the market was a definite increase in the number of hoggets yarded, more being available than for some considerable time. Although during the early part of the month when supplies were not so heavy, buyers paid from  $4\frac{1}{2}$ d to  $4\frac{3}{4}$ d per lb., the increased numbers yarded resulted in a fall of from  $\frac{1}{2}$ d to  $\frac{1}{4}$ d per lb., closing rates being  $3\frac{3}{4}$ d to  $4\frac{1}{2}$ d per lb.

Suckers were forward in larger numbers, also a moderate supply of old lambs, the latter showing a tendency to increase. Really choice quality lambs were at all times scarce, a large

/proportion ....

proportion of the supply being of fair to good quality only. Plain dry suckers were well represented in the penning. One pleasing feature of the month's activities was the consignment of lambs from the Camden district; they were a Southdown Cross and for all-round excellence of quality left little to be desired. Raised and fattened so close to Sydney, when compared with the other lamb producing centres of New South Wales, they were indeed a very creditable effort on the part of the owner and on both occasions, when marketed, topped the market.

Right throughout the month prices for lambs and suckers were comparatively steady, values not fluctuating to such an extent as was the case with grown sheep. One line of particularly good quality suckers sold to 30/- per head, while on many occasions sales were made to 27/-; generally, however, good quality suckers and old lambs realised from 20/- to 25/- per head, according to size and weight. Plain lambs reached as low as 8/- per head but were unsuitable for the trade and were purchased by graziers for restocking purposes. Prices on the hoof for the carcase reached 6 $\frac{3}{4}$ d per lb. for choice suckers and a good deal of lamb was sold at this very satisfactory figure; on an average, however, 5 $\frac{3}{4}$ d to 6 $\frac{1}{2}$ d per lb. was the most consistent price, buyers basing their operations chiefly on these price levels. Plainer grades could at all times be obtained at relatively lower rates.

The month's operations could be regarded as very satisfactory, demand at all times being good and the resultant prices quite favourable from the grazer's viewpoint.

A fairly substantial decline in the number of cattle sold was evident during the month of December. About 25,000 were auctioned, or over 7,000 less than the previous month. The holiday period intervening and restricting selling days no doubt affected supplies, but on the other hand, many centres must, as a result of the continued dry conditions, have found difficulty in forwarding suitable stock. Of the total cattle, bulls and stores accounted for at least 12% and on two sale days more than 500 head were offered. In fact the position in regard to stores has become so acute that arrangements have been made to commence selling at 8.30 a.m., or half an hour earlier than usual in order that the fat stock auction might not be unduly delayed as has been the case in the past.

Unfortunately no improvement in the quality of cattle was apparent nor could this desirable state of affairs be reasonably expected. On two or three days, however, an occasional attractive draft was noticed while throughout the period a moderate showing of suitable trade cattle was available. This latter class of beef sold rather well mainly owing to the demand created by reason of the hot and sultry weather conditions that prevailed. Plain and inferior stock were always far too much in evidence, some lots being easily the worst penned for a long time.

/Once ....

Once again very few heavy cattle were yarded and bullocks weighing over 750 lb. were almost entirely absent. Light to medium weight bullocks and steers made up a big proportion of supplies, but many were quite unsuited to certain operators. On one particular day a fairly big draft of Black Polls was included; they were well furnished and of good appearance. Beef of this type sold readily. For good quality light to medium weight beef rates varied considerably ranging from 34/- to 42/- per 100 lbs. Quite a number of sales, however, were noticed where the equivalent of from 38/- to 40/- per 100 lbs. was realised. A notable line of Shorthorn bullocks, heavier than the usual run, averaged £13.12.0 per head; they were not prime but had an attractive appearance, and on the day sold the price was considered very satisfactory.

Cow and heifer beef was for the most part exceedingly cheap as the majority was of very plain description. Any suitable lines, however, met with a keen demand and rates rose accordingly. As an instance of this, a sale of a line of well-bred shorthorn heifers numbering about 50 in all, averaged the high price of £8.18.0 per head. They were not too fat and about 2 years old. The rate per 100 lbs. greatly exceeded that realised for plain quality.

Vealers and yearlings were generally well represented but quality animals were in comparatively short supply. Those few that were good sold well, the rate per 100 lbs. on the hoof being between 44/- and 48/-. Medium quality and plain lots were at times very cheap but occasional sales were effected at fairly high levels.

During the earlier part of the period, the market showed signs of weakening but recovered somewhat after the first three sale days. Values for plain and medium lines did not share in the rise but towards the middle of the month as the good cattle improved in value a steadier tone was noticeable for the medium and plain. The brighter tone was maintained to the end of the period. Altogether the market was distinctly in favour of the seller, showing a gradual upward trend. Certainly plain and inferior cattle were cheap at times but it is hardly to be expected that the trade can continue to absorb this class of stock at anything like high prices.

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The Victorian Department of Agriculture advises that the estimated yields of apples and pears in that State for the 1937/38 season are 2,500,000 bushels of apples and 1,500,000 bushels of pears compared with a production of 2,873,327 and 1,657,763 for apples and pears, respectively, in 1936/37.

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

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Conditions associated with the disposal of potatoes on the Sydney market during December showed no improvement on those of the previous month and sales were generally unsatisfactory. Supplies were much smaller but were in excess of the demand which waned with the advent of hot weather. Local growers railed 17,529 bags of tubers to Alexandria. These were all of the new season's crop and included 3,716 bags of special "Factors" from the Dorriggo district. The latter were the one bright feature in an otherwise dull market; most lines had been raised from Certified Seed and, being grown in red soil, possessed appearance as well as quality. Competition amongst buyers was keen and realisations for these Dorriggo stocks were the highest on the Sydney market. From £5.0.0 to £7.16.8 per ton was obtained at auction. The remainder of the local stocks was from various districts, mainly Windsor. Throughout the greater part of the month, clearances were slow and, although rates touched £6.18.4 per ton, they ranged mostly from £3.5.0 to £5.0.0. In one or two periods of over-supply agents were obliged to dispose of choice potatoes at £2.10.0 per ton.

Shipments from Tasmania aggregated 26,224 bags, representing less than half the November supply. Nevertheless, values were lower because of a marked slackening in request. Only two varieties were represented, namely, old season's Brownells which were quoted at £4.0.0 to £5.0.0 per ton and new Bismarcks which realised from £6.0.0 to £7.10.0.

It is expected that new season's Brownells will be introduced around the middle of January.

Queensland brown onions were rather scarce during the month and the greater portion of the 2,950 bags of onions received from that State was of the white variety. The few brown lots which were on offer cleared well at £5.0.0 to £6.0.0 per ton and the inquiry for white, which had been fairly quiet during November, showed some improvement. Fewer local consignments were to hand and Queensland white benefited by the lack of competition. From £7.0.0 to £10.0.0 per ton was obtained, according to quality. Shipments of Victorian brown approximated 4,000 bags for which agents also reported a satisfactory request. Values throughout the month were firm at £6.10.0 per ton. Local growers railed 1,749 bags to the market for which quotations were as follow:-  
New South Wales (Brown) £5.10.0 to £6.0.0; (White) £5.0.0 to £10.0.0 per ton. The quality of the latter varied considerably.

Most of the trading in pumpkins on the Sydney market during December took place in Sussex Street. Shipments from Queensland aggregated 9,300 bags and were sufficient for all needs.

/Brisk...

Brisk clearances were reported each week, choice lines moving out rapidly at £8.0.0 with inferior at as low as £5.0.0 per ton. Very little business was done in pumpkins at Alexandria as only 8 trucks from Queensland were in position. These, however, met with an extraordinarily good demand at prices ranging from £4.10.0 to £7.0.0 per ton, according to quality.

No Tasmanian carrots or parsnips were available during the period under review and supplies are not expected until the new season commences. There were, however, 1,059 bags of new swedes from that State and inquiry for these was steady. Values did not vary throughout the month and were firm at £5.0.0 per ton.

The position regarding forage sales at Alexandria during the month of December was an extremely interesting one. The market in general had a tendency to firm and many rates advanced. A slight easiness was experienced towards the middle of the month when supplies were temporarily outside trade requirements. This situation, however, righted itself with the arrival of the holiday periods when stocks commenced to dwindle. Dry weather conditions in many country districts made buyers anxious concerning the regularity of supplies and, under the influence of increased competition, values advanced in the last week of the month. From £5.5.0 to £6.15.0 per ton was obtained for the 184 trucks of oaten chaff received during the period, although only odd sales were reported as being above £6.10.0. Wheaten chaff was more lightly supplied, only 25 trucks being available. The quality of the offering varied considerably and prices ranged accordingly from £4.10.0 to £6.5.0 per ton.

The improvement in demand for local lucerne chaff which was a feature of November trading continued to rule during the period. Consignments, amounting to 58 trucks, were again lighter and a much firmer market resulted. A general improvement in quality was also noticeable and choice lines sold readily at £7.0.0 to £7.10.0 per ton. Quotations for medium ranged from £5.5.0 to £6.15.0 per ton.

Turning now to lucerne hay, we find the one forage line for which a widely fluctuating market ruled. Supplies at Alexandria during December were very irregular and there were many occasions on which complete clearances were impossible, even at the lowest prices. Consignments from the Maitland district totalled 124 trucks which, if divided evenly over the period, would have been ample for all requirements. As it was, however, periods of glut caused prices to drop sharply and range from £2.0.0 to £3.10.0 per ton. At other times, from £4.0.0 to £5.5.0 per ton was obtainable for good quality hay. Mature stocks amounting to 69 trucks were mainly from the Mudgee district and many special lines were on offer. Sales in general ranged from £5.10.0 to £7.0.0 per ton and, but for the excessive supplies of soft hay, would no doubt have been higher. In Sussex Street, also, Hunter River Lucerne Hay was more heavily supplied. The 1,050 bales received moved out quietly at £2.0.0 to £4.10.0 per ton.

/Demand ....

Demand for Victorian oaten hay, which was firm during November, showed a complete reversal during December. Although only 60 bales were received, agents experienced difficulty in effecting clearances and, whilst attempting to maintain the market at £9.10.0 per ton, were obliged to make a few sales at £9.0.0. The quality of the 26 trucks of local oaten hay in position varied considerably and prices ranged according to quality from £5.0.0 to £9.0.0 per ton. Demand generally was satisfactory.

December stocks of Tasmanian straw, totalling 3,300 bales, were less than half the previous month's offering. The position was, therefore, very firm and the rate of £4.15.0 per ton, which was frequently attained during November, became the fixed price for the month under review. Clearances of the 34 trucks at rail were also most satisfactory. Varied qualities were available and prices ranged from £3.15.0 to £4.15.0 per ton.

The market, in general, continued to decline for the 83 trucks of local wheat at Alexandria. Quotations early were as high as 4/10<sup>3</sup>d but soon depreciated to range from 4/1d to 4/7d per bushel for the remainder of the period. Trading on the whole was very quiet, possibly on account of the intervening holidays.

Only 800 bags of maize were received from the Northern Rivers. These were slow to move and the market which opened at 5/6d eased later to 5/- per bushel for both Yellow and White. From the Illawarra district, stocks were very small amounting to only 220 bags. This shortage was caused by the dry weather conditions which necessitated reserving maize stocks for fodder. The shipments which did arrive, however, were of good standard and sold well at 5/3d to 5/6d per bushel.

The quality of the 53 trucks of local oats forwarded to Alexandria during December showed considerable variation. Large quantities passed into store but a good demand was reported for the portion which was offered to buyers. Quotations ranged from 2/9<sup>3</sup>d to 3/7<sup>3</sup>d per bushel, according to quality. There was no interstate competition.

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Reports from Agricultural Instructors and honorary Crop Correspondents for December indicate that the greater portion of the grazing areas of the State experienced particularly dry and hot weather. In some localities the adverse situation was relieved by the advent of rain storms of varying intensity, late in the month. In many instances, however, the falls were of a very scattered nature and afforded little benefit to grasslands, although they assisted in the replenishment of surface water supplies.

A period of hot weather has been the general experience of most districts throughout the State since the beginning of January and agistment country is in demand. In some localities hand-feeding is almost general.

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

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Trading during the first three weeks of the period under review was for the most part of a steady nature. A marked improvement, however, was apparent just prior to the Christmas season when a large volume of business was transacted and, while the market was not as animated prior to the New Year holidays, clearances, nevertheless, were very satisfactory in most lines.

With plentiful supplies of summer fruits available, old season apples, with the exception of Democrat (which was practically the only coloured variety with sufficient quality to show retailers a reasonable profit on their outlay) went out of favour with buyers and became increasingly difficult to sell, particularly as a large percentage of most sorts, including New South Wales grown Granny Smiths, did not hold their condition in cool storage and were lacking in quality when withdrawn. Satisfactory prices were obtained for the relatively small proportion which opened up in good condition but the balance was offered at nominal rates, in an endeavour to effect sales. Tasmanian shipments approximated 14,000 cases per week for the first three weeks but by the end of the month the total had decreased to little over 1,000 cases, owing to the unsatisfactory condition of the market. New season cookers from local sources were available in increasing quantities as the month progressed; choice large and medium sized descriptions met a steady inquiry but there was little demand for small fruit. Carringtons also came to hand from near metropolitan districts, and the best quality descriptions sold well. Gravensteins, too, made their appearance on the market but were too green to be sold for other than cooking purposes.

Small quantities of pears, including Williams but principally of the Clapp's Favourite variety, were supplied from local centres, as also from Victoria towards the end of the month, but were rather immature for ready sale.

The bulk of the heavy supplies of Valencia oranges which were forward during the first week of the period under review consisted of plain grade fruit in which black spot infection was prevalent, this being due to the excessive rains received during the harvesting period. This class of fruit met with little inquiry, stocks accumulated and losses from breakdown were extensive. Standard grades, however, moved out steadily but prices generally were easier. Supplies were not as plentiful later in the month and there was an improved demand for good quality fruit and prices showed an upward trend. Second crop fruit made its appearance on the market from time to time in considerable quantities but lacked quality and was practically unsaleable.

/While ....



While values of lemons fluctuated considerably there was on the whole a steady demand for small and medium sized fruit and prices ranging to 12/- per case were recorded for choice "cured" lemons from both coastal and inland districts. There was little inquiry for mandarins and rates were nominal.

Late varieties of cherries such as St. Margaret and Florence were available; supplies were fairly heavy early in the month but toward the latter end only moderate stocks came to hand. Generally a steady demand was maintained at firm rates with an upward trend in values towards the end of the month, when choice lines realised to 7/- per quarter-case.

Small plums were slow of sale, even though factory buyers were operating. Large fruit of quality, however, was in request and values showed a steady improvement.

The market was heavily supplied with small peaches, which vendors had difficulty in disposing of, even at low prices, during the first fortnight. This had a rather depressing effect on the market generally and, while choice large fruit met a steady demand, sellers were obliged to reduce prices. Subsequently peaches of better quality and in smaller quantities were forward, including consignments from Victoria; a good demand was experienced for quality lots and values appreciated.

Supplies of apricots from local districts were supplemented by fairly heavy consignments from the Irrigation Area. Small fruit was rather difficult to sell, demand being restricted chiefly to choice large descriptions. Prices ranged from 2/- to 4/6 early in the period but a steady upward trend in values was apparent throughout the month.

Small consignments of nectarines made their appearance on the market during the second week and by the end of the month fairly plentiful stocks were available. Choice large fruit sold freely at satisfactory prices, up to 10/- with some sales at higher rates per half-case being recorded.

Passionfruit were scarce at the beginning of the month and up to 20/- per half-case was realised for choice lines. Supplies principally from Queensland and the North Coast increased to such an extent that towards the close of the period they would have presented a serious problem had not the factories bought extensively for the manufacture of pulp. Prices declined by 12/- to 15/- per half-case over the period.

Although bananas were heavily supplied, values of choice quality descriptions were well maintained up till the Christmas season, but stocks of ripe and fully coloured fruit, which were extensive, were offered at attractive prices to facilitate clearances. During the intervening period between

/Christmas ....

Christmas and New Year, agents found it most difficult to dispose of accumulated stocks of ripe fruit. This had a depressing effect on the market generally, although good sound fruit realised satisfactory prices

Weekly consignments of pineapples from Queensland totalled in the vicinity of 3,000 cases and the quality of the fruit showed an improvement on that of last month. During the first fortnight satisfactory clearances were effected at prices ranging to 12/- but by the end of the month values had improved and up to 17/- per tropical case was recorded for the best quality lines. Buyers showed a marked preference for Northern Queensland fruit over that grown in the Southern portion of the State.

Queensland Rockmelons were fairly heavily supplied during the first and second weeks when arrivals totalled 1,358 and 1,028 cases, respectively. Consignments during the rest of the month were not as large but the deficiency was made up by increasing quantities from local sources. There was a good demand for quality melons and up to 16/- per tropical case was recorded for the best brands from Queensland, while immature and ripe fruit were cleared at lower rates.

Supplies of peas varied from moderate to heavy but only a relatively small proportion were of choice quality. Prices of choice lines fluctuated but generally there was a fair demand and from 8/- to 10/- was obtained for the best quality lots. Difficulty was experienced in disposing of inferior lines for which as low as 2/6d per bushel was accepted.

Beans for the most part were heavily stocked and indifferent quality descriptions constituted the greater proportion of the available supplies and were at times practically unsaleable. Considerable variations were apparent in prices of choice descriptions, the range over the period being from 2/- to 8/- per bushel. The 8/- was obtained during a temporary shortage about the middle of the month, while the low rate of 2/- ruled during a period of excessive supplies shortly afterwards. A little improvement was noticeable during the following week while at the end of the month values of choice lines had risen to 7/- per bushel.

Cabbages were plentiful throughout and demand for the most part was limited, inferior lines being difficult to clear. Prices generally ranged from 1/- to 4/- per dozen.

Weather conditions throughout the month were usually favourable to the sale of salad vegetables. Lettuce were for the most part heavily supplied but only a relatively small proportion were of choice quality. Choice "heads" were in request and, while prices varied somewhat, they were on the whole very satisfactory, up to 4/- per dozen being recorded.