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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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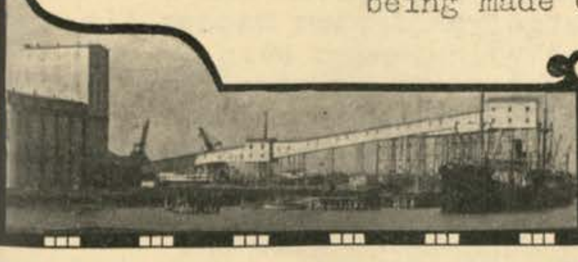

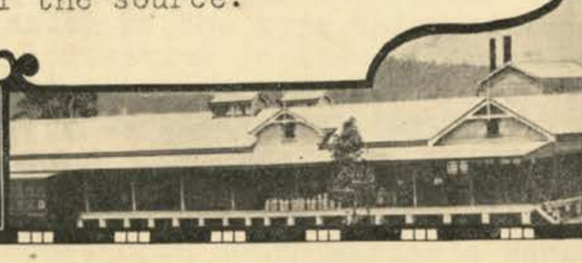

MONTHLY MARKETING REVIEW.

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.

IX.

South African Marketing Legislation.

The Chief of the Division of Economics and Markets, Department of Agriculture and Forestry, Union of South Africa, has been good enough to send me, on request, copies of Acts 48 of 1934, 58 of 1935 and 26 of 1937. The first-mentioned of these Acts establishes and defines the functions of a Livestock and Meat Industries Control Board, the second constitutes a Wheat Industry Control Board and defines its functions and the third is the Marketing Act, 1937. It is the last-mentioned Act that is of main concern in this series of Notes, but perusal of the two previous measures is useful introduction to the comprehensive enactment of 1937. The earlier measures, that is to say, give clear indication of a trend of public policy in South Africa which could be expected to lead to a more comprehensive experiment in the field of statutorily-organised marketing. That field, as this series of Notes has shown, is in process of exploration in a number of countries. Perhaps, one could more correctly say 'exploitation' and so distinguish between those that have actually moved into this most promising field and those that contemplate so doing and are exploring its possibilities. It is highly significant, one imagines, that the United Kingdom, New Zealand, the Dominion of Canada and a number of its Provinces, the Union of South Africa and at least three of the Australian States have all passed marketing legislation of the type which aims, by statute, to give opportunity for collective in lieu of individual marketing of primary products - all-embracing instead of partial co-operation - unified in place of competitive selling by primary producers.

The work of preparing notes upon South Africa's Marketing Act of 1937 is rendered agreeably easy by a Summary and Elucidation of its Provisions and Procedure by Mr. A.P. Van der Post, Assistant Chief, Division of Economics and Markets, Department of Agriculture and Forestry. What follows is really a series of extracts from Mr. Van der Post's very lucid review.

The Act is a general enabling measure permitting of the establishment of regulatory boards of control in respect of agricultural produce without the necessity of special legislation by Parliament. For this purpose it provides -

1. for the establishment of a National Marketing Council, consisting of five or six members, as the Governor-General may determine, two of whom - the Chairman and Deputy-Chairman - shall be officers of the Department of Agriculture and Forestry:

2. for the establishment of a producers' committee, of eight members, six of whom shall be nominated by the South African Agricultural Union, and of a Consumers' Committee of eight members, two of whom shall be nominated by the United Municipal Executive of South Africa:

3. for the submission of schemes to the Minister, for their examination by the Marketing Council, their submission to the vote of producers if they are accepted by the Minister, their final approval by the Governor-General by proclamation in the Gazette, and for the possible amendment, review, revocation and suspension of schemes.

The National Marketing Council's functions are mainly:-

(a) To investigate all schemes for the establishment of regulatory boards of control submitted to, and referred to it by, the Minister; to draft and submit such schemes to the Minister, if he so desires; and to assist in the organisation of any regulatory board.

(b) To exercise a certain amount of control over all schemes actually in operation by, for example, inspecting them and auditing their books of account and by attending any of their meetings or those of any committee appointed by a board.

(c) To advise the Minister about decisions of the regulatory boards in regard to matters such as prices and quotas.

(d) To advise the Minister about such marketing matters as he may refer to it, and about the prohibition or regulation of the importation or exportation of any agricultural product.

/The....

The functions of the Producers' and Consumers' Committees are as follow:-

The Producers' and Consumers' Committees are advisory and consultative bodies which the Minister may consult in connection with any matters affecting the interests of respectively producers and consumers and which the Marketing Council may similarly consult in regard to any scheme. Each of these committees may also make representations to the Minister or the Marketing Council in regard to matters affecting the interests of producers and consumers, respectively.

Each Committee shall consist of eight members appointed by the Minister for two years and shall elect its own Chairman. Six of the members of the Producers' Committee shall be nominated by the South African Agricultural Union and two of the members of the Consumers' Committee by the United Municipal Executive of South Africa. The Minister himself shall nominate the remaining members, that is, two in the case of the Producers' Committee and six in the case of the Consumers' Committee.

Any association of producers, or any co-operative society or company, or any board established in terms of any control act already passed by parliament (that is to say, the Dairy Industry, the Live Stock and Meat Industries, the Mealie Industry, the Tobacco Industry and the Wheat Industry Control Boards), may submit a scheme for the regulation of the marketing of the product in which it is interested.

The scheme must be submitted in writing to the Minister of Agriculture and Forestry. The Minister himself may prepare a scheme and the Marketing Council may also submit a scheme.

When a scheme has been submitted to the Minister, he may, after consultation with the Marketing Council, and in the case of a scheme embodying any so-called marketing powers, also with the Consumers' Committee, reject it, or refer it back with his comments to the party who submitted it, or approve of it provisionally.

When the Minister has approved of a scheme provisionally, he must refer it to the Marketing Council for investigation and report. He may further publish particulars of the scheme in the Government Gazette and in the private press and invite parties interested in the product to which the scheme relates to lodge any objections to, or make any representations concerning, the scheme to him in writing within four or more weeks (as specified in the notice) from the date of publication of the scheme in the Gazette.

/After....

After consideration of the report of the Marketing Council upon any scheme and of any objections to or representations concerning the scheme, the Minister may, if he is satisfied that the scheme will be practicable and effective, accept such scheme and, subject to certain conditions, prescribed in Sections 21 and 22, recommend it to the Governor-General for approval.

Every scheme submitted to the Minister must set forth its name, the product to which it relates and the area within which it shall apply. It must provide for the proper organisation and administration thereof, and for the establishment, constitution and method of appointment of the board which is to administer it, for the board's funds, powers and duties, for the issue of regulations, and define the persons or classes of persons engaged in the production or marketing of the product, or any class or grade of the product, to which the scheme will apply.

The funds are to be raised by means of a levy imposed on the product concerned and payable by producers on such quantities as they may sell or by parties dealing with the product in the course of trade, or by both producers and such dealers. The levy may be imposed in respect of any class, grade or standard of quality of the product concerned and may vary as between different classes or grades or standards of quality or as between that portion of the product sold on the domestic market and that exported. Any levy decided upon must be made known by the Minister by notice in the Government Gazette.

The scheme must also provide for the proper representation of producers on the board which is to administer it and may provide that parties other than producers, such as middlemen and consumers, may be represented on the board, but the producer-members must constitute the majority of the members of such board. The Minister may appoint an officer of the Department of Agriculture and Forestry as a member of any board.

The powers of boards may be distinguished as regulatory and marketing powers. Regulatory powers, although, on the whole, similar to those exercised by existing boards of control, have been considerably extended.

A scheme may provide that no person, whether producer or dealer, shall sell the product concerned unless he is registered with the board administering the scheme, and that no person shall be so registered unless he complies with requirements prescribed by regulation (persons whose registration is refused, however, have the right of appeal to the Minister).

/A scheme....

A scheme may further provide for the keeping of proper records by persons handling the product in the course of trade, for the appointment of advisory committees, for the co-opting of at most two advisory members, and, finally, for a fine not exceeding £100 for transgression of the provisions of the scheme.

Other powers are those of advising the Minister as to the grades and methods of packing and marketing the product concerned, whether produced locally or imported; of determining the quantities of the product which may be introduced into, or removed from, or sold in, a specified area during a specified time; of acting as agent and conducting a pool for the sale of the product concerned; and of treating that product, grading, storing and processing it, insuring, advertising and transporting it, financing any operations of pooling it may adopt, and making advances to the contributors to the pool.

The marketing powers which regulatory boards may exercise relate to the buying, selling and preparation for sale of the product concerned and the sale thereof only to, or through the agency of, the relative board or to such person or through such agency as the board may determine.

Subject to the approval of the Minister, these powers include the determination of the description and quantities of the product which producers may sell and the purpose for which they may be sold, and the determination of the prices below, at or above which, the terms on which, and the persons to whom or through whose agency the product, in unconverted or converted form, may be sold by the producer or by any person handling it in the course of trade.

Finally, a board may be empowered, with the approval of the Minister, to prohibit the sale of the product concerned except under permit issued by it, and such permit may be cancelled in case of contravention of any provision of the scheme or any regulation made under the Act.

In the case of schemes containing merely regulatory powers, the Minister may recommend approval thereof to the Governor-General without submitting it to the vote of the producers concerned, if he is satisfied that its introduction will be in the interests of those producers. Similarly, he may recommend for approval a scheme submitted by any of the existing five boards of control established by special legislation.

/The....

The Minister must submit to the vote of the producers concerned any scheme containing marketing powers, but need not do so in the case of a scheme submitted by any of the existing five boards. He may, however, also decide to submit a purely regulatory scheme to the vote of the producers concerned.

In the case of a purely regulatory scheme which has been submitted to the vote, the Governor-General can assent only if he is satisfied that the majority of the producers who voted upon the scheme have approved of it and, during the three years preceding such voting, have produced more than half the total quantity of the product produced in the area in which the scheme is to apply. In the case of a scheme containing marketing provisions, the majority voting in favour of the scheme must be three-fifths of the producers concerned and they, too, must have produced more than half the quantity of the product produced in the area concerned during the preceding three years.

In the case of a scheme relating to a product in respect of which a board, established by special legislation, is already in existence, the Governor-General may by proclamation in the Government Gazette suspend any provision of the relevant act which, in his opinion, is inconsistent with the provisions of the scheme.

When once proclaimed, a scheme is binding upon all persons to whom and in the area to which it applies.

Amendments of schemes may be submitted to the Minister in writing by the organisations which are entitled to submit schemes or by the Consumers' Committee or by the Marketing Council, and shall be dealt with in similar manner as new schemes submitted to the Minister.

After the expiration of two years from the date upon which a scheme came into operation, the Minister may call upon producers interested in the product to which a scheme applies to vote upon the continuance or otherwise of the scheme. The procedure in connection with such voting is the same as that prescribed in the case of a new scheme and the Governor-General may revoke such scheme if similar approval of discontinuance is given as is prescribed in the case of approval of a new scheme.

If the Minister, upon receipt of representations, has reason to believe that a scheme imposes an undue burden upon either producers or consumers or is contrary to the public interest, he may appoint a committee of not more than three persons, to investigate and report upon the working of the scheme in question. If, after the receipt of the report of such a committee, and a recommendation by the Marketing Council, the Minister is satisfied

/that.....

that the complaints were justified, the Governor-General may suspend the onerous provisions for a period not exceeding six months. The report (of the Committee) and the recommendation of the Marketing Council must be tabled in both Houses of Parliament.

At the request of both Houses of Parliament the Governor-General may by proclamation in the Government Gazette revoke or amend any scheme or repeal or amend any amending proclamation.

Decisions by any regulatory board to prohibit producers to sell a product except to or through the medium of the board or to or through the medium of such person as the board may determine, or to prohibit the sale of any classes or grades or quantities other than those determined by the board, or to prohibit any person from selling such product or selling it at any price other than that determined by the board, must be submitted by the board to the Marketing Council who shall transmit them to the Minister together with its comments.

Similarly, every regulatory board must, within three months of the close of its financial year, submit a report of its activities during that year to the Marketing Council.

Any levy imposed by the board and any decision to restrict the sale of a product or any class or grade thereof, and any decision to fix prices or to control the sale of a product by the issue of permits, must be made known by the Minister by notice in the Government Gazette. The Minister may also by notice in the Government Gazette prohibit the introduction into, or the removal from, an area, of any product, or the sale of such, except under permit issued by the board concerned. Decisions requiring persons to export to an oversea market determined by a board, or to furnish information to a board about a product, shall be conveyed to the persons concerned by registered post or be made known by the Minister by notice in the Government Gazette.

Loan Funds: An agricultural marketing fund shall be established by appropriations by Parliament from which the Minister may make loans to regulatory boards on the recommendation of the Marketing Council. Loans may also be obtained by regulatory boards from the Land and Agricultural Bank.

Returns: The Minister is empowered by notice in the Government Gazette to call upon local authorities or upon any other specified person (other than a producer) handling live stock or agricultural produce in the course of trade, at auctions for example, or as buyer or seller, to render periodical returns to the Secretary for Agriculture and Forestry.

/Imports ......

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/Imports ......

Imports and Exports: The Governor-General is empowered to control the importation or exportation of any regulated product by proclamation in the Government Gazette.

National Mark: The Governor-General is also empowered by proclamation in the Government Gazette to prescribe a national mark in respect of a specified product. A national mark so prescribed may be used only by a person with the written permission of the Minister. Furthermore, provision is made for an inspection service in connection with such national mark.

Offences: The offences, fines, and the validity of any procedure under the Act are defined, as well as the admissibility of certain records as evidence at criminal trials.

Indemnity: The South African Railways and Harbours Administration is protected in the case of its refusing to accept for transport produce which may not be removed from, or into, an area consequent upon a decision of a regulatory board.

In concluding this series of Notes, an attempt will be made to supply a comparative review of the legislation already surveyed. There is a fundamental likeness or kinship between each of the several Acts, though the Parliaments that have passed them and the communities concerned are widely separated. On the other hand, there are differences of method and varying degrees of comprehensiveness, which it should be useful to note.

(To be concluded).

A.A.W.

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The Imperial Economic Committee, in a publication "World Consumption of Wool in 1937", states that the relatively high price of wool during the early part of the year proved favourable to the utilisation of wool substitutes. Increased consumption and many technical improvements were reported in Germany and Italy, while Japan's output of staple fibre showed a sharp increase. In the United States also, trade reports indicated a larger output of mixtures of wool with other cheaper fibres. Owing to the absence of reliable information it is not possible to gauge the extent of the utilisation of other fibres in the United Kingdom wool textile industry. The output of staple fibre increased in 1937, and it seems not unlikely that part of this output is being utilised in mixtures with wool.

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CONFERENCE OF VEGETABLE GROWERS.

The Annual Conference of the Vegetable Growers' Association of New South Wales was held in the Municipal Chambers, Bankstown, on 1st and 2nd June, 1938. This was the first occasion of holding the Conference at a venue outside the City of Sydney and it afforded an opportunity to vegetable growers in this and adjacent important producing areas to attend and become conversant with the activities of the Association. Results achieved justified the departure from previous practice, the Conference proving a highly successful one. The attendance of the Minister for Agriculture (Hon. A.D. Reid, M.L.A.) was much appreciated, and, in view of the interesting and highly informative nature of his opening address, the opportunity is taken to publish it in these columns. The Minister stated:-

"The request by the Vegetable Growers' Association of New South Wales that I should open and address this year's Annual Conference of the Association has come to me early in my career as Minister for Agriculture and I am glad the opportunity has soon presented itself to contact with so important an industry. My pleasure was the greater when I learned that acceptance of the invitation would enable me to meet representative growers of both country and metropolitan centres.

It is very appropriate that the Conference should be held in Bankstown. I understand that Bankstown is the largest of our Metropolitan Municipalities and that within its borders there is a great amount of rural industry in the form of vegetable-growing and poultry-farming particularly. It is not unusual to refer to each of these as minor industries, but I do not so regard them. The acreage of individual areas devoted to those industries may be and usually is small, but the production therefrom is the result of intense farming and the aggregate outturn of each is a substantial item in the primary production of the State.

The following information in respect of the principal vegetable crops of New South Wales is compiled from figures published by the Government Statistician. They pay no attention to production from areas of less than one acre:-

Estimated Total Value of Vegetable Industry of New South Wales (exclusive of Potatoes) in the Year 1936/37.

	£
Market Gardens	382,195
Peas	97,908
Beans (Green, Broad and Dried)	39,574
Cabbages	14,906
Cauliflowers	16,867
Onions	5,642
Sweet Potatoes	12,418

/Pumpkins.....

		£
Pumpkins and Melons	..	73,926
Tomatoes ..	..	176,229
Turnips ..	..	38,278
Certain Root Crops	..	6,895
Total Estimated Value:		864,838
ADD Estimated Value of Potato Crop of New South Wales		512,581
Grand Total:		£1,377,419

As I have said, the foregoing grand total does not include any allowance for production from areas of less than one acre. One is very well aware, however, that there is a good deal of commercial production of vegetables on individual areas of less than one acre. As a rule, such production would be associated with other forms of farming. It is very difficult to form an estimate of the value of this production, but that it is appreciable cannot be doubted. Allowing for such production and for the necessarily conservative nature of the Statistician's estimate of the value of production from areas of one acre and upwards (and excluding the vast amount of "back-yard" production) it seems very safe to say that the value on the farms of the commercial vegetable production in New South Wales reaches somewhere between 1½ and 2 million pounds.

In the above figures I have included the estimated value of potato production. It is true that potato-growers have their own separate organisation known as the Potato Growers' Council of New South Wales and that the body whose annual conference I am now about to open represents all other vegetables. Whilst, however, the separate organisation of potato-growers has been deemed advisable, the fact remains that potatoes are vegetables and that a large proportion of the members of this Association are growers of potatoes as well as of other vegetables.

Having regard to the fact that poultry-farming is so important a feature of primary industry in the Bankstown Municipality, I may be pardoned for quoting the value to the State of that other so-called minor industry.

New South Wales

Value at Place of Production.

Eggs	..	£2,725,807
Poultry consumed	..	713,243
		£3,439,050

/The ....

The fact is that the vegetable-growing and poultry-farming industries which play so important a part in the welfare of this Municipality are necessary to the well-being of the State and each is so regarded by my Government. It is not my wish unduly to burden my address with figures, but the following, as illustrating the point I have been making will, I think, be of interest to you:-

Australia

Comparison of Production Values.

Extracted from Production Bulletin No. 30, Year 1935/36.

Vegetables	..	..	£7,080,000
Eggs and Poultry ..		..	9,578,000
Fresh Fruit	..	..	7,701,000
Mutton and Lamb (Locally Consumed)			8,893,000
do. do. (Exported) ..			4,465,000
Beef (Locally Consumed)		..	12,073,000
do. (Exported) ..		..	2,481,000

When it is remembered that commercial production from individual areas of less than one acre occurs so often in connection with the Vegetable and Poultry Industries and so rarely in connection with the other industries cited and that the statistical authorities do not concern themselves with production from smaller areas than one acre, it will be realised that in fact the comparison is probably even more favourable to those industries than the figures indicate.

I am impressed with the possibilities of expanding the vegetable industry in this State. There is a world-wide tendency to consume greater quantities of vegetables. In these days when so many Governments are increasingly concerning themselves with the physical development of their peoples, this tendency is being encouraged as conforming to sound dietary practice. Apart, however, from the trend to greater consumption, which must be decidedly encouraging to you gentlemen, there is the fact that New South Wales is a large importer of vegetables

Turning to the Handbook prepared in the State Marketing Bureau and copies. of which have been supplied to the members of Conference, I find that imports of Onions are responsible for nearly the whole of the State's consumption of this very widely used vegetable. The following figures are eloquent on this point:-

Year	Total Consumption	Imported
	Tons	Tons
1934-35	17,624	17,335
1935-36	19,745	19,514
1936-37	17,392	17,093

My Departmental officers assure me that the conditions are present in New South Wales to warrant a much greater local

/production....

production of Onions. The same, or a practically similar position prevails with regard to Potatoes as the following figures show:-

Year	Total Consumption (ex.seed)	Imported
	Tons	Tons
1934-35	101,439	72,346
1935-36	110,361	67,834
1936-37	130,747	83,492

Here again, I am assured that the position is that New South Wales could substantially increase her potato-production.

In other directions, I have been glad to note increased production in this State. For example, tomato-production has increased from 500,000 half-bushel cases in 1934-35 to 571,000 in 1936-37 and the position is that we produce approximately half our tomato requirements. The swede turnips position is particularly satisfactory. Over three years the production in New South Wales has increased from 4,700 tons to 10,100 tons per annum.

If I put it that there are three sides to the work of my Department, viz., the field, scientific and economic, with all three linked by the highly important general administrative activities, the question may arise in some of your minds - To what extent is the vegetable industry benefiting? I say 'some of your minds' advisedly, because those of you who are actively identified with the work of the Vegetable Growers' Association, or of its sister body the Potato Growers' Council, will know full well that in the field very valuable work is being done for the vegetable industry by the Agricultural Instructors set aside for that purpose. On the scientific side, equally valuable work is being done. Investigations carried out, or being carried out, by scientific officers of the Department touch a wide range of problems arising within the domain of vegetable-growing. They include investigations into Cold Storage, Spotted Wilt and Virus diseases and experiments in the control of Tomato Mite, Aphids on Tomatoes, Red Spider on Beans and Bean Fly. These are but a few of the activities intended to enable vegetable-growers to avoid the 'hit or miss' methods of past days. On the economic side, the work of the State Marketing Bureau is becoming widely known. The daily broadcasting of prices is a service that proceeds from Monday to Friday of each week with unfailing regularity. Investigations as to the 'spread' of prices between producer and consumer and the maintenance of close touch with marketing conditions and facilities are among activities directed to the economic welfare of your industry. I may fairly claim, therefore, that my Department is far from unmindful of your industry. The activities I have outlined will continue and I bespeak for my officers your co-operation as it is by mutual effort that the utmost good will be achieved.

Having spoken of the activities of the Department of Agriculture on your behalf, it is but right that I should refer to the work of your Association. It is the policy of the Department to

/assist......

assist organisations of primary producers. We do this, knowing that organisation for general purposes will inevitably lead to organised effort to promote specific objects. The work of the Department, in all of its phases, is helped by the existence of organisations. Thereby we are enabled to make and maintain contacts with groups of growers and to facilitate understanding of the Department's objects and purposes. This Association, as a matter of fact, came into being in the year 1931 as the result of a State-wide conference of vegetable-growers convened by one of my predecessors in the portfolio of Agriculture, the Hon. W.F. Dunn, M.L.A., and has fully justified the high hopes expressed at its inauguration. Through the Association country and Metropolitan growers are brought together in a spirit of mutual goodwill and co-operation.

Bankstown being in the County of Cumberland reminds me that practically all the great industries in which, as Minister for Agriculture, I am concerned had their Australian initiation within its borders. This year we have celebrated 'with joy and rejoicing' and with splendid pageantry the 150th Anniversary of the commencement of white settlement in Australia.

It is interesting to recall that round about 150 years ago, fruit and vegetable-growing were entered upon in the vicinity of Farm Cove in an area now covered by the Botanic Gardens. Sheep-farming and wheat-growing in the vicinity of Parramatta, vine-growing at Ryde and the cultivation of maize near Windsor are other instances of the founding of great industries in the County of Cumberland - the 'home County' of New South Wales.

This County right up to the borders of our Metropolis, as we see here in Bankstown and even closer in, is still the scene of much agricultural activity and, although its achievements in this respect are exceeded in other parts of the State, and notwithstanding that it long ago ceased to be a centre of production of wheat for grain or of any considerable numbers of sheep, it would be a very great mistake to suppose that rural interests and the sentiments and outlook that go with rural industries are missing from within its precincts. I can assure you gentlemen and through you each vegetable-grower, poultry-farmer, orchardist, pig-farmer, dairy-farmer and every other type of primary producer in this County that the Department of Agriculture is deeply concerned with your welfare, as with primary producers everywhere else in the State, and will gladly assist you to the best of its ability.

It now gives me very great pleasure to declare this Conference open."

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AUSTRALIA'S SHARE IN THE UNITED KINGDOM MARKET.

As primary products constituted over the five-year period ended 30/6/1937 97% of the total exports of Australia, it is interesting to follow briefly the trend of Australian trade with the United Kingdom in the chief primary products exported. The statement which follows has been specially prepared in the State Marketing Bureau from British Government Official records and it clearly illustrates the extent to which Australia supplies foodstuffs and other primary products to the people of the United Kingdom.

It is interesting to note, as well, the place Australia holds in comparison with competitors in this market.

Wool production is the major primary industry in the Commonwealth, and large quantities are exported annually. Actual figures show that during 1937 84% of the total requirements of the home country were drawn from Empire sources, of which Australia supplied 39%, New Zealand and South Africa's share being 23% and 12%, respectively. The Argentine contributed 9% towards the total.

The quantity of butter exported from Australia during the year was a little less than that of the previous season, comprising 16% of the total imports into the United Kingdom, but a falling-off in production due to unsatisfactory seasonal conditions was mainly responsible. New Zealand was the largest Empire supplier, providing 31% of the total imports, which represented an increase of 2% over the previous year. Australian butter is well received overseas and it seems reasonable to suppose that the increased exports which would be a natural corollary of more favourable seasons in Australia, would not unduly tax the absorptive capacity of the United Kingdom market.

It is pleasing to note that, although the total imports of wheat into the United Kingdom during 1937 were some 8,000,000 bushels less than in 1936, Australia maintained her position in the market with 23% of the total imports, which was the same as that for the previous year. Canada, however, which in the past has laid a very strong claim to the British market, supplied 35% of the total or a reduction of 22% on last year's figure.

The position in regard to frozen beef may be considered satisfactory as each year since 1933 has been marked with a steady increase in the quantities shipped to Great Britain. During 1937 Australia supplied two-thirds of the total imports of this commodity by United Kingdom.

Although Australia so far has not entered largely into the chilled beef trade, it is making remarkably steady progress on the U.K. market, during 1936 supplying 3.37%, and in 1937 5.11%, of the total imports. Although these figures are relatively small when compared with shipments made by other exporting countries, they indicate progress. Considerable experience has been gained from

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past shipments and, with improved chilling facilities being made by a number of shipping companies, the future looks promising for the chilled beef trade. Australia can produce the right kind of beef for the overseas markets and there is every prospect that the industry will assume larger proportions in the future, provided continuity of supplies is possible and other factors are given adequate attention.

A pleasing feature is the increase gained by both mutton and lamb on the British market; although not so substantial in respect of lamb, a rapid increase took place in the case of mutton. Actually mutton improved from 17% of the total imports to 27% of the aggregate and lamb from 26% to 28%. There seems to be little doubt that Australia, by devoting more attention to the raising of sheep and lambs suitable for the overseas trade, could earn an enhanced reputation for quality and an increasing share of the market in the United Kingdom.

Reviewing the situation as a whole, it is indeed gratifying to note that, except in a few instances, a larger share of the English market was obtained by Australian products. That share, however, can only be maintained by the closest attention to the product from the point of production to the point of distribution. The United Kingdom still constitutes by far the best overseas market for Australian primary products. In that market spirited competition is met, not only from other members of the British Empire, but foreign countries as well.

The following schedule includes a comparison on a percentage basis of the trend of Australian trade with the United Kingdom in our principal primary products during the years 1933 to 1937:-

Product	Total Quantity imported into United Kingdom in 1937 from all countries	Percentage of Imports to U.K. from Australia to total imports from all Countries.				
		1933	1934	1935	1936	1937
		%	%	%	%	%
Wool (lb.)	783,824,000	32	32	41	37	39
Butter (cwt.)	9,416,366	19	22	22	17	16
Cheese (cwt.)	2,936,879	3	4	5	3.4	4
Wheat (bush.)	180,849,243	26	21	18	23	23
Beef, frozen (cwt.) (including boned)	2,618,350	51	56	58	64	66
Beef, chilled (cwt.)	8,971,439	-	.66	2.69	3.37	5.11
Lamb, frozen (cwt.)	5,304,189	19	24	27	26	28
Mutton, chilled and frozen (cwt.)	1,498,725	20	29	25	17	27
Pork, chilled and frozen (cwt.)	1,057,416	11	8	16	23	22
Fresh Fruit:						
Apples (cwt.)	5,502,692	26	26	21	29	27
Pears (cwt.)	1,123,190	22	15	18	21	26
Eggs (doz.)	247,316,420	10	11	10	7	5

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THE EGG PULP SITUATION IN CHINA.

The Acting Australian Trade Commissioner in China (Mr. A.L. Nutt), writing from Shanghai on 18th March, 1938, gives an interesting review of egg pulp production in China and the present position regarding the 1938 pack.

Mr. Nutt states that in ordinary years the total pack of egg pulp is approximately 45,000 to 50,000 tons of which about 90% is processed in the spring months (March to end of June or early July). Shanghai is the largest packing centre with a contribution of in the vicinity of 50% of the total. Tientsin, Tsingtao and Hankow are the other main places where eggs are pulped.

Dealing with Shanghai first, Mr. Nutt reports that egg supplies are chiefly drawn from the Yangtsze river districts and from the area served by the Tientsin-Pukow railway, whilst small quantities are also obtained from Wenchow and district (about 400 miles south of Shanghai). Formerly a large proportion of Shanghai's requirements were obtained via the Tientsin-Pukow railway but, due to the Sino-Japanese hostilities, these supplies have been entirely cut off. It was expected that supplies from the areas bordering on the Yangtsze river north of Shanghai, particularly the Kompo district, would be available this season in fairly large quantities because that part of the country has not been ravaged by war yet. The river port of Nantungchow is the outlet for that district, which is a large producer of various foodstuffs including eggs. On the 14th of March the local Chinese authorities at Nantungchow closed the port, apparently for military reasons, and it was thought that as a result the pack in Shanghai this spring might be very substantially reduced.

With regard to Tientsin, the season there commences somewhat later than Shanghai and conditions in that area suggest that a 50% of normal pack may be possible. Tsingtao may also yield a similar percentage, but with regard to Hankow, the two packers who usually operate there have decided not to open their works this spring because of the risk involved. There are ample supplies of eggs obtainable from the districts usually serving Hankow, but in view of the likelihood of Sino-Japanese hostilities extending to Hankow (which is one of the remaining strongholds of the Chinese Central Government) in the near future, packers are not prepared to process and store their pulp there. They have no means of shipping it out under present conditions. Hankow, which is a fairly important packing centre, is therefore eliminated.

Generally speaking, it may be said that in the areas of China where severe fighting has taken place all livestock including poultry has been destroyed. Hostilities have occurred along all the railway lines in the egg producing districts and along most of the waterway communications. It does not follow, however, that the whole countryside has been ravaged, but such would be the case at least in areas adjacent to the main lines of communication.

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The huge aggregate of eggs is obtained from many thousands of small farmers who have only a few birds each and they sell their eggs to the collectors throughout the countryside, buying for the different packers. Because rail transport is not now possible to the packing centres and waterway traffic is greatly interrupted, supplies from areas where eggs are still procurable are difficult to obtain owing to the lack of transport facilities.

Eggs are not generally pulped in the summer and autumn months, especially in the autumn when prices are too high to permit the pulp packers handling them profitably. However, in view of the present shortage, prices of eggs have ceased to be the most important factor and packers who in previous years have paid about $20 per 100 lbs. for eggs for pulping are now paying from $30 to $35 per 100 lbs. in order to procure supplies.

The main packing months are April and May, and it is yet rather early to give a firm estimate of the quantity of eggs which will become available during those months. Much depends upon whether conditions throughout the country brighten or become worse and whether the present lack of transport facilities can be overcome.

Mr. Nutt stated that inquiries made amongst the leading packers of egg pulp indicate that the total output in China this year would be about 25% to 35% of normal. In a supplementary report, however, dated 27th April, he states that the quantities now likely to be packed would be greater than previously anticipated. He goes on to say that the flow of eggs into Shanghai recently has been quite remarkable considering current conditions and it is due largely to the high prices which packers have been paying. These prices have induced farmers to forward the whole of their production and not to retain any eggs for their own consumption. The river port of Nantungchow has been opened for shipments again and supplies are also being obtained from coastal ports in the south such as Wenchow where, in normal times, eggs are too costly to purchase for pulping purposes.

Prices reached as high as $40 (approximately £3 A.C.) per 100 lbs. landed in Shanghai which is unremunerative to packers who are unable to show a profit on their overseas sales. It was necessary to pay such prices in order to procure essential supplies but, in view of the freedom with which eggs are now coming forward, a 25% decrease in the price was to be brought into effect by packers commencing on the 1st May, 1938. This, it was thought, might lead to a temporary curtailment of supplies, but as $30 (£2.5.0.A.C.) per 100 lbs. is highly payable to farmers, packers anticipated that they would continue to send their eggs forward notwithstanding the price reduction.

As far as Tientsin and Tsingtao are concerned, although the quantity of eggs being received is not up to normal it is very good considering conditions, and the final pack for the year at those places may not be very far short of average. /There ....

There are quantities of eggs available in the Nanking and Wuhu areas and they are cheap because farmers are unable to dispose of them, consequently consideration is now being given to commencing packing in Nanking if suitable arrangements can be made with the authorities there.

The quantity of eggs which packers have been able to secure in the different packing centres lately has far exceeded their earlier estimates and they now expect that by processing throughout the year the total pack may be equivalent to 50% to 60% of normal. It was anticipated that, unless something unforeseen occurred, May would be a heavy packing month as it would represent the height of the spring season for supplies.

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FRUIT PURCHASED BY N.S.W. RAILWAYS - 1937.

The following schedule indicates the quantities and values of the different kinds of fruit bought by the New South Wales Railway Department during the year 1937. An outstanding feature is the marked decrease in the purchase of oranges, 18,662 cases being bought compared with 29,604 in the previous year.

	Quantity		Purchase Price £
Almonds and Raisins	12,620	Lge. Pkts.	238
do. do.	11,160	Sml. Pkts.	85
Prune sweets	32,713	packets	882
Apples	14,898	cases	5,442
Apricots	181	"	47
Bananas	4,049	"	3,907
Cherries	3,709	"	848
Lemons	573	"	227
Mandarins	1,164	"	480
Oranges (Valencia)	6,635	"	2,823
do. (Navel)	12,027	"	5,204
Peaches	975	"	294
Pears	2,179	"	900
Pineapples	535	"	287
Plums	763	"	182
Grapes	4,245	"	1,152
Nectarines	325	"	122
Passion Fruit	152	"	66
Various	356	"	137

Total Purchases

	No.	Purchase Price £
Fruit - Cases	52,766	22,118
Almonds and Raisins		
Large Pkts.	12,620	238
Small Pkts.	11,160	85
Prune sweets	32,713	882
		£23,323

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MODERATE SUPPLIES OF CATTLE BUT SHEEP PLENTIFUL AT HOMEBUSH SALEYARDS, SYDNEY.

Large supplies of sheep reached the Homebush Saleyards throughout May, 255,996 sheep and 110,415 lambs being yarded, or some 89,000 more than in April. Continued unfavourable conditions in country districts where there was a scarcity of feed and water resulted in fairly substantial numbers of stock being forwarded for sale, which were in many instances little better than stores. Beneficial rains afforded some measure of relief to certain of the drought-stricken areas of the State towards the end of May and this was reflected in a material decrease in yardings at Homebush. At the last auction held in May there were only 13,200 head of sheep and lambs available, or about 29,000 less than the preceding sale day's total.

It is only to be expected on markets where quality sheep are scarce that demand for that class of stock would be strong and the period under review proved no exception. Although some lines of wethers and ewes were very attractive, quite a number of those penned were only of fair to good trade quality, while at all times there was a preponderance of plainer grades. The market during May was for the most part fairly steady; a sharp rise in values, however, occurred at the close, values being the highest for eight months, the rise varying from 1/- to 4/- per head, according to quality. Some very satisfactory sales of good to prime wethers were effected at prices ranging to 30/-, while ewes made to 24/- per head. Values for the most part, however, ranged from 18/- to 26/- for good wethers and ewes were mostly disposed of at 14/- to 20/- per head. Fair trade sheep and the plainer descriptions cleared at correspondingly lower levels.

The end of the month saw best wether mutton selling to 5d per lb. with occasional lots of nice quality light mutton making to 5¼d. On an average, however, wethers cost from 3d to 4d for fair to good trade and prime grades 3¾d to 4½d per lb. Rates for ewes were somewhat lower but up to 4¾d was obtained for the better sorts at the end of May, although mostly prices ranged from 3d to 3¾d according to weight and quality.

The short supply of good to prime sheep forced buyers to obtain the bulk of their requirements from the fair to good trade lines offering; this tended to create a much more stable position in respect of this class of mutton.

Moderate yardings of lambs were available but hoggets were at all times fairly scarce. As was the case with sheep, plain lambs were numerous, fair to good quality lots being far short of actual trade requirements. Owing to the scarcity of good quality lambs, values were consistently high, prime grade being in strong request from all sections of the trade. Some very high prices were recorded, up to 31/- per head being paid; generally, however,

20/-......

20/- to 28/- was the usual figure at which good lambs were disposed of according to weight and skin value. In the early part of May, lamb cost to 7¼d per lb., but towards the middle of the month values appreciated to 7½d and held to the last sale in the month when buyers paid 7¾d. This represents a substantial increase and would amount from 1/- to 2/- per head, according to the weight of lamb. Medium to plain sorts also participated in the improvement and showed a rise of from ¼d to ½d per lb.

There was a good deal of variation in the quality of the hoggets offered. Fair numbers were plain, nevertheless some very attractive pens were auctioned at prices varying from 25/- to 32/- per head; other grades, of course, realised lower values. With rates ranging from 4¼d to 5d for the most part, the market was fairly steady but the sharp rise experienced at the end of May forced the price per pound up to 6d.

The skin market displayed weakness, several decreases of from ¼d to ½d per lb occurring. This, taken into consideration with the actual realisations for sheep, resulted in high prices per pound for the carcases.

The acute seasonal position has in some measure been relieved, although some time must necessarily elapse before feed supplies are again adequate. Graziers in the favoured areas will now be in a position to build up their flocks which were so badly depleted owing to the drought and restocking activities are already apparent. Indications point to a shortage of stock at the Homebush Saleyards for some time to come and a continuance of the present high prices for sheep and lambs appears likely.

Although 28,463 head of cattle were sold at Homebush during May, the average daily yardings were considerably less than April; the total, however, exceeded that month by some 4,000. Once again, bulls and stores formed a big percentage of the stock offered, numbering in all 4,738 head.

Throughout the month the quality was never of a very high standard but it may be deemed reasonably satisfactory when the adverse pastoral conditions in most grazing areas are taken into consideration. With the coming of good and fairly general rains over an extensive section of the State, however, the prospect of an improvement in the cattle marketed is much brighter than for months past. It is true, of course, that some time must elapse before feed is available, while further rains are needed, particularly in the Riverina and the Western Division.

On some sale days, occasional outstanding lots of bullocks and steers were included in the supply but the great majority comprised chiefly fair to good trade descriptions. Early in the period, a notable consignment of bullocks, trucked at Moree, comprising Herefords and Shorthorns, sold to £12.14.0 and averaged £11.16.0 per head. They were generally of medium weight and fairly well furnished. Towards the close of the month,

/another....

another line of bullocks and steers of mixed breeds and very attractive appearance realised to £12.16.0 and averaged £12.6.0 per head. This latter draft was much lighter, the dressed weights being estimated to range from 560 lb. up to 640 lb. Sold on a rapidly rising market, they were worth approximately 40/- per 100 lb. on the hoof. Of the medium quality bullocks and steers, a sale selected as typical of many during the period, was a line of cattle of mixed breeds which would "kill" at from 580 lb. to 630 lb., the equivalent of 31/- per 100 lb. dressed weight being obtained. Many sales of really good trade lines were also noticed where prices on the hoof were from 33/- to 34/- per 100 lb.

Each sale day saw cows and heifers well in evidence, supplies from the recognised beef producing centres being considerably augmented by local stock of dairy strain. Plain to fair quality lots predominated but occasional consignments were really good, especially towards the close of the period. Among the latter was a line of about 50 cows and heifers of exceptionally good appearance - prime without being over fat. They sold at an average price of £10.7.0 per head, the tops realising £11.4.0.

Supplies of vealers were for the most part restricted to fair trade descriptions which were available in moderately large numbers. Sales were inclined to be somewhat unsatisfactory when compared with figures for previous months but a much better tone was apparent at the close.

The pronounced decline in values towards the end of April persisted for the first two sale days in May, when the market settled at lower levels than for some time past. Very little change was then noticeable in the general trend until the close when, following the advent of rain in country areas, values appreciated considerably, a feature being the big increase for medium grade cattle.

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The Bacon Industry Bill, introduced in the House of Commons in April, is, it is understood, designed to give effect to proposals for the re-organisation and assistance of the bacon and bacon-pig industries in Great Britain. The Bill, inter alia, provides for the establishment of a Bacon Development Board consisting of five persons appointed by the Minister of Agriculture and the Secretary of State for Scotland and four persons nominated respectively by the Pigs Marketing Board and the Bacon Marketing Board. It is proposed that the development board shall exercise functions in consultation with the marketing boards. Provision is made for the submission, approval, amendment, and revocation of factory rationalization schemes for the purpose of regulating the extent of the facilities for producing bacon and increasing the efficiency of the industry. Proposals in the Bill for the licensing of bacon factories are based on the provisions of the Bacon Development Scheme, 1935.

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

It was reported in the last issue of this Review that the market for Tasmanian potatoes in Sussex Street, which had been firm for the greater part of April, eased towards the close following an increase in the size of the weekly shipments. This tendency continued to be in evidence during May, as growers in Tasmania, encouraged by the higher prices ruling, increased their exports and Sydney received 114,476 bags. Agents, however, succeeded in maintaining rates at £1 per ton below the previous month's levels. Generally speaking, clearances were moderately satisfactory, particularly for the better quality Brownells and Bismarcks. The "Improved Pinkeye" variety, which was introduced on the market some months ago, has been officially classified as the "Alba" variety and is now known under that name. Prices over the month were as follow:- Brownells £9.0.0 to £11.0.0; Bismarcks £8.0.0 to £10.10.0; Albas £8.0.0 to £10.0.0; Snowflakes £7.0.0 to £9.10.0; Arranchiefs £7.10.0 to £9.10.0 per ton. The standard of quality of the Tasmanian tubers, generally, was satisfactory, although Snowflakes were reported to be slightly below average on account of "glassy end" caused by second growth. Other interstate supplies in Sussex Street comprised 3,100 bags of Victorian Carmans and 3,400 of West Australian Delawares. These met with a fluctuating demand from week to week and prices ranged from £7.0.0 to £10.0.0 per ton accordingly. Receivals at Alexandria from growers in New South Wales centres were more extensive during May and in all 12,027 bags came to hand. Considerable trouble was experienced through grub-infestation and a large percentage of stocks at rail was withheld from sale for re-grading. On the other hand, some growers maintained the previously high standards of quality and auction realisations for best "Factors" compared very favourably with the prices fixed for Tasmanian tubers on the wharves. Seed was keenly sought after early in the period but demand later fell off very materially. The range of prices was as follow:- No. 1 Grade £6.10.0 to £11.0.0, Seed £5.5.0 to £9.5.0 per ton.

Shipments of Victorian onions during May aggregated 16,350 bags. Despite this larger supply, a much improved inquiry was in evidence and prices advanced. The white variety was practically out of season and, as buyers competed keenly for possession of the moderate offering each week, values appreciated to range from £15.0.0 to £20.0.0 per ton. Prices of brown were regulated mainly by the quotations ruling in Victoria where a generally upward tendency was apparent. Agents were able to effect brisk clearances at £7.10.0 to £10.0.0. Supplies of picklers were rather small and prices firmed slightly to range from £4.10.0 to £6.10.0 per ton. In addition to the shipments to Sussex Street, 689 bags of Victorian Brown onions were consigned by rail to Alexandria. These moved out well at £9.0.0 to £9.10.0 per ton.

/Local .....

Local growers forwarded the only pumpkins to be available on the Sydney market during the period under review. Windsor consignments by road to the Municipal Markets continued to decline and buyers were more dependent upon arrivals by rail from the Maitland district. A much firmer market prevailed and, although prices ranged from £4.10.0 to £6.10.0 per ton, very few choice pumpkins were offered under £5.10.0. Arrivals at Alexandria totalled 57 trucks. It is reported that the Queensland pumpkins are almost ready and some supplies from that State may be expected soon. Agents are of the opinion that the greater proportion of consignments will come by rail as buyers are averse to purchasing bagged lots.

The quantities of Tasmanian vegetables received on the Sydney market during May were almost double those of the previous month. Swedes totalled 12,028 bags, Carrots 4,529 and Parsnips 910. Weather conditions were much more favourable to consumption and increased competition caused prices to advance. Swedes were quoted at £3.0.0 to £7.0.0, Carrots at £4.0.0 to £10.0.0 and Parsnips at £6.0.0 to £15.0.0 per ton. In addition, moderate stocks were forthcoming from Victoria and sold well each week at the same rates as those fixed for Tasmanian grown.

During the month beneficial rains fell over many of the drought affected areas of the State but the position in the South-West, Riverina and far Western districts was only slightly relieved. The rains did not arrive any too soon as agents had predicted that fodder supplies were in danger of giving out owing to the extremely active demand for forage and grain for hand-feeding of stock. Rain will be required in those districts where hand-feeding is still proceeding before prices of forage can be expected to decline.

Consignments of oaten chaff to Alexandria comprised 144 trucks from local and 11 from Victorian centres. A strong demand operated at all times and values advanced to the highest levels recorded since 1929. Local realised from £6.0.0 to £9.0.0 and Victorian from £6.0.0 to £8.5.0 per ton. Shipments of Tasmanian oaten chaff to Sussex Street amounted to the much larger total of 48,650 bags. These stocks were much in demand throughout and quotations were higher at £6.0.0 to £7.10.0 per ton. Receivals of wheaten chaff were again light, amounting to only 27 trucks, and realisations were at most times higher than those for oaten. From £7.10.0 to £9.0.0 per ton was recorded.

The market for lucerne chaff was again firmer during May despite the fact that the 76 trucks received represented double the offering of the previous month. Demand was more than equal to the supply and an increase of 20/- per ton was general. Considerable variations in quality, however, were apparent and rates ranged accordingly from £6.10.0 to £10.10.0 per ton. Trading in Maitland lucerne hay fluctuated. Prices opened firmly but an influx of very soft immature hay was responsible for a temporary

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collapse around the middle of the month. The position later righted itself, however, and with the breaking of the drought, green lucerne hay became much in request as a substitute for maize. Supplies of soft hay were then absorbed by consumption in the Metropolitan area. In all, Maitland growers forwarded 112 trucks for which quotations were as follow:- Soft and Green £3.5.0 to £7.0.0; Dry £5.0.0 to £9.0.0. These prices represent the highest realisations for immature fodder which have been obtained for many years. Arrivals of mature lucerne hay from various other centres of the State comprised 42 trucks for which rates advanced sharply to range from £6.15.0 to £9.0.0 per ton for medium and from £9.10.0 to £11.0.0 for choice. Shipments of new green hay from the Hunter River aggregated 321 bales during the period. Each consignment cleared well at £4.0.0 to £6.10.0 per ton.

Rail consignments of oaten hay received at Alexandria during May were smaller, amounting to 30 trucks. As a result, prices were higher at £8.0.0 to £9.0.0 per ton. In Sussex Street, 210 bales of Victorian oaten hay and 130 of Tasmanian came to hand. The former moved out steadily at £10.0.0 whilst the Tasmanian stocks, being differently baled and of slightly lower quality, realised £6.0.0.

Tasmanian growers introduced a new fodder commodity on the Sydney market during May under the name of "Red Clover Hay". It is understood that this product is not produced to any material extent in New South Wales, although it is grown in some of the Southern areas and consumed locally. On account of the shortage of fodder in the drought areas, however, the 1,800 bales received were much in request for country orders and, by reason of its comparative cheapness, growers found it a valuable stock ration. Quotations throughout the month were firm at £6.10.0 to £6.15.0 per ton.

The 4,600 bales of Tasmanian straw offered were well within requirements and agents experienced no difficulty in maintaining disposals at £4.10.0 per ton. Local growers forwarded only 17 trucks to Alexandria for which £3.15.0 to £4.10.0 was paid.

A very weak demand ruled for the 30 trucks of wheat railed to Alexandria during the period. Prices opened at 4/4d to 4/6d per bushel but soon declined to range from 3/9½d to 4/1d. Agents found it hard to maintain sales.

Maize was the one commodity on the market which suffered a severe setback by the advent of rain. For the first half of the month, a very strong demand was apparent and, in addition to the large reconsignments from Sydney to country areas, a considerable quantity of Queensland maize was absorbed in New South Wales by way of direct consignment over the Northern border. Prices at that time were high and agents were able to clear stocks at 5/3d to 5/6d per bushel. Once rain had fallen, however, a large return of stocks by rail was apparent. Prices declined sharply

/and....

and for the remainder of the month agents experienced difficulty in disposing of stocks at 4/6d to 4/9d per bushel. Consignments by sea comprised 7,700 bags from the Northern Rivers and large quantities from Queensland amounting to several thousand bags. By rail, 46 trucks came to hand for which the market showed the same variations as in Sussex Street.

Trading in oats on the Sydney market was much more extensive. Tasmania forwarded several thousand bags, portion of which was released on the open market at 3/7d to 4/- per bushel. Only 3 trucks of oats were railed to Alexandria, 3/8½d per bushel being quoted.

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

Demand for most kinds of fruit was somewhat limited throughout May and trading generally was of a quiet nature.

The opening of the fruit and vegetable markets simultaneously at 7 a.m. commenced on Monday, 2nd May, when the new vegetable market was opened for business.

There was a steady inquiry for choice local apples of selected sizes but values generally eased slightly early in the month owing to the arrival of heavy shipments from Tasmania. Towards the end of the month, however, prices of coloured lines of quality from both local and interstate sources hardened. Large New South Wales Delicious were sought after and prices ranging to 14/- per case were paid, with odd sales at higher rates. Clearances of local Granny Smiths were also satisfactory and values were steadily maintained.

Pears were only moderately supplied, the principal varieties available being Packhams Triumph, Winter Cole and Josephine. There was a good demand for choice fruit, particularly Packhams Triumph, which realised to 12/- per case. Winter Coles eased slightly during the second week when fairly large quantities were forward from Tasmania and Victoria but subsequently, when supplies from all sources were lighter, this fall in values was regained.

Navel oranges came to hand in steadily increasing quantities from coastal districts and the Irrigation Area for the first three weeks of May, and a gradual downward trend in values was apparent. There was subsequently a temporary shortage of stock, however, owing to rain in the producing areas holding up harvesting operations and prices advanced by about 2/- per case. Choice, coloured lemons met a fair inquiry early in the month and up to 9/- and 12/- per case was recorded for coastal and Irrigation

/Area.....

Area supplies, respectively. With large quantities available later, however, together with a weakening demand, prices declined. Irrigation Area consignments then practically ceased but supplies from coastal districts were more than sufficient to meet the limited demand, and values remained relatively low. Emperor mandarins were available in small quantities only early in the period but towards the middle of the month there was a noticeable increase in supplies. Most lines, however, were lacking in colour and were therefore not in favour with buyers and values depreciated. The quality improved somewhat towards the end of the month but as inquiry was still somewhat restricted prices showed no improvement. Small consignments of the Glen Retreat variety came to hand from Queensland. As this fruit was of exceptionally good colour and quality, it sold readily at rates ranging from 10/- to 14/- per case.

Purple Cornichon grapes were fairly plentiful early in the period but subsequently only odd small lots were available. Demand generally was limited and values depreciated. The Ohanez variety was also on offer in moderate quantities and cleared well at satisfactory prices.

Passionfruit, which were moderately supplied throughout, cleared steadily at rates ranging to 12/- per half-case until towards the end of the month when a much weaker demand was experienced and prices declined.

With only moderate supplies of pineapples available during the first fortnight, prices were relatively high. Later, however, consignments were forward and this, together with a rather quiet demand, resulted in a lowering of values.

Considerably increased supplies of bananas were on offer during the first half of the period under review owing to the heavier Queensland loadings. The quality generally was very good but there was a preponderance of large-sized fruit. Weather conditions were not conducive to brisk trade and values by the end of the third week showed a considerable decline. Later, however, there was a temporary shortage of supplies owing to floods in the producing areas of New South Wales and Queensland and choice fruit was sought after at advanced rates.

For the most part, tomatoes were moderately stocked. Only limited quantities came to hand from Victoria and as these generally lacked quality, they were not wanted and were reduced in price to facilitate clearance. Cooler weather conditions early in the month were not favourable to sales and a general easing of values was apparent. Choice, coloured locals moved out satisfactorily and the market was well maintained throughout the period, prices ranging to 12/- per half-case. Green descriptions, however, were slow of sale. During the week ended 25th May, the first consignments for the season totalling about 560 half-cases were received from Bowen (Queensland); satisfactory disposals were effected at 5/- to 8/- per half-case.

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During the first week of May moderate supplies of local peas were supplemented by heavy consignments from the Irrigation Area. Choice locals cleared readily but others were slow of sale and a considerable proportion was purchased by buyers operating on behalf of canneries; values generally showed a downward trend. The following week inland supplies were greatly reduced owing to extensive damage to crops by frost. Quality lines moved out freely at advanced rates and up to 14/- per bushel was recorded. These prices were not maintained, however, as supplies later were sufficient to meet all requirements.

Considerable fluctuations were apparent in both supplies and values of beans. Generally, however, choice descriptions cleared well and prices on the whole were very satisfactory. The first North Coast and Queensland consignments of any consequence came to hand during the week ended 11th May, totalling 200 bags and 30 cases, respectively. From then onwards consignments steadily increased.

Cabbages were plentiful throughout. While clearances of choice "heads" were for the most part very good, a gradual decline in values was apparent.

Stocks of cauliflowers up to the end of the third week varied from moderate to fairly heavy. Quality descriptions moved out well; prices fluctuated somewhat but up to 18/- per dozen was recorded. Exceptionally heavy supplies were on offer towards the end of the month owing to the heavy rain causing crops to mature more rapidly than usual and rates were considerably reduced to facilitate clearances.

Most kinds of bunched vegetables were well supplied and cleared steadily at satisfactory prices.

Lettuce were in relatively light supply; choice were particularly scarce and early in the month realised as high as 6/- per dozen. Later quotations, while still very satisfactory, were considerably lower.

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The area under potatoes in Victoria this season is estimated by the Department of Agriculture in that State at 42,000 acres compared with 45,627 acres planted in 1936-37. An average return of 3 tons per acre for the State is expected, giving a total estimated yield of 126,000 tons as against 200,000 tons in the previous season. It is possible the total available quantity of table tubers will be reduced through grub damage, which is estimated to range from 25% to as much as 50% in some districts.

Exports of potatoes from Victoria to New South Wales during May totalled 2,378 tons.

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WHOLESALE PRICES OF VARIOUS COMMODITIES IN SYDNEY (N.S.W.) DURING MAY, 1938.

The following table gives particulars of the range of wholesale prices in Sydney as collected and recorded by the State Marketing Bureau in respect of sales of various commodities during the month of May, 1938:-

Commodity	From	To	
Wheat:-			
Bulk	3/5¾d	4/1d	per bushel
Bagged	3/6¾d	4/1½d	" "
Flour	£9.5.0	£10.0.0	per ton
Bran £7.0.0 per ton)			
Pollard £7.0.0 " ") no variation			
Eggs (Hen) 2/- per dozen (no variation)			
Butter:-			
Choice 151/10d per cwt.)			
First Quality 147/2d " ") no variation.			
Second Quality 142/6d " ")			
Cheese:-			
Loaf 10½d per lb.)			
Large 10d " ") no variation			
Special Brands	11½d	1/-	per lb.
Pigs (Abattoir Sales):-			
Prime Light Porkers	33/6d	41/6d	per head
" Med.Wgt. "	40/6	50/6	" "
" Heavy "	45/6	54/6	" "
" Baconers	59/6	76/6	" "
Backfatters	£3.5.0	£7.0.0	" "

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SYDNEY WOOL SALES - MAY.

The Sydney Wool Selling Brokers' Association advises that 63,605 bales of wool, including 60,309 greasy and 3,296 scoured, were sold in Sydney during the month of May.

The average prices realised were as follow:-

Class of Wool	Per Bale	Per lb.
Greasy	£13. 6. 2	10.4d
Scoured	15.17. 4	16.7d
Greasy and Scoured	13. 8.10	10.6d

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RETURN OF FRUIT AND VEGETABLES IMPORTED INTO NEW SOUTH WALES
BY LAND AND SEA - APRIL, 1938.

FRUIT.

STATE	Pines cases	Bananas cases	Other Fruit cases	Tomatoes cases	TOTALS cases
Queensland	19,718	12,809	16,997	2,357	51,881
Victoria	19	165	15,435	31,397	47,016
Tasmania	-	-	231,075	649	231,724
Sth. Aust.	-	-	4,541	1,265	5,806
West Aust.	-	-	-	140	140
TOTALS:	19,737	12,974	268,048	35,808	336,567

VEGETABLES.

STATE	Potatoes Bags	Onions Bags	Swedes Bags	Pumpkins Bags	Cucs. & Chillies Cases	Other Vegetables Packages	TOTALS Packages
Queensland	122	35	-	485	105	1,845	2,592
Victoria	31,234	25,692	314	-	21	4,198	61,459
Tasmania	107,618	-	6,408	-	-	4,900	118,926
Sth. Aust.	961	148	-	-	-	9,319	10,428
West Aust.	-	-	-	-	-	-	-
TOTALS:	139,935	25,875	6,722	485	126	20,262	193,405

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

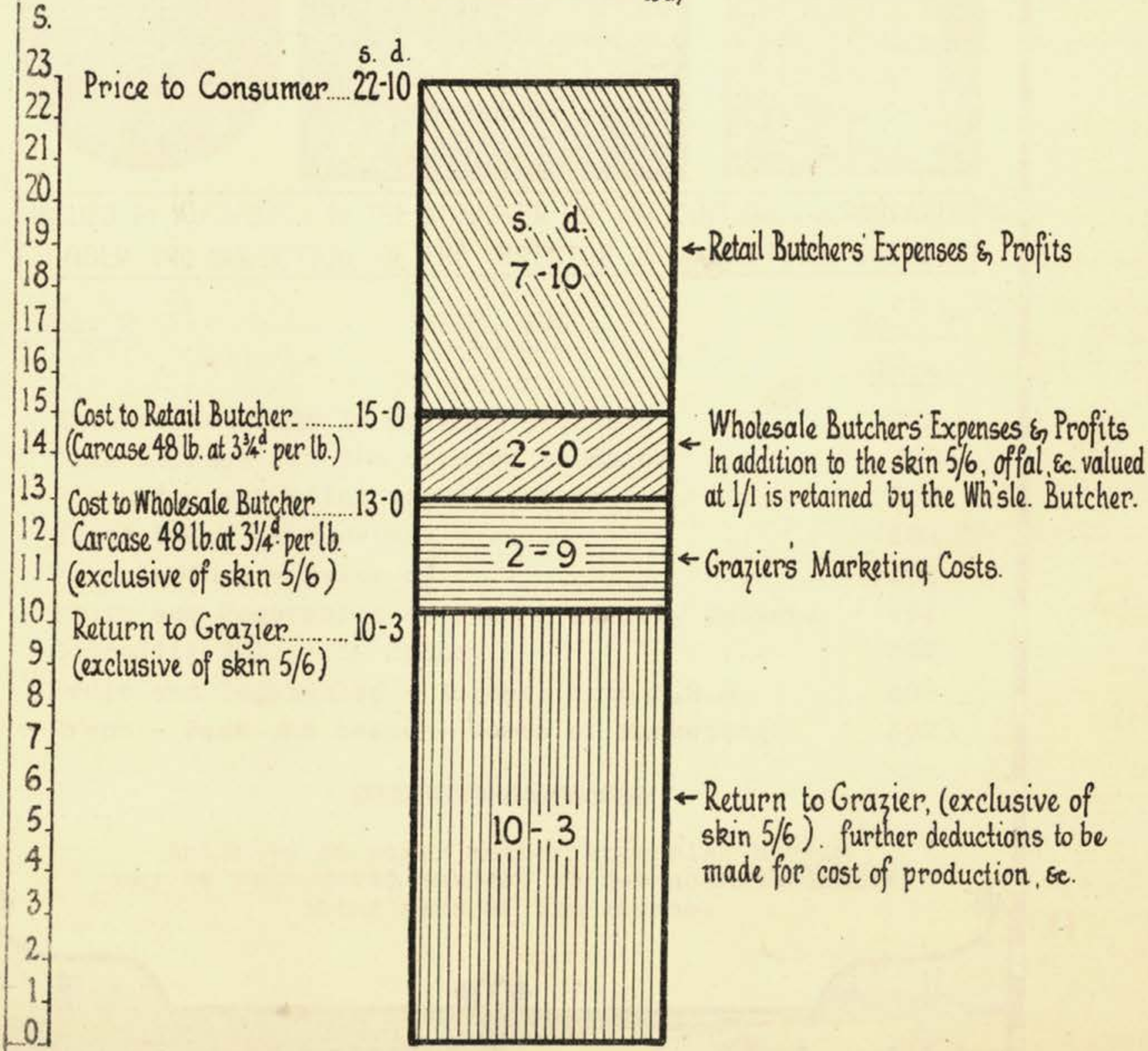
S. 1. e.

SHEEP (GOOD TRADE WETHER)

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

APRIL 1938

38-617



Basis of Graph: A Wether weighing 96 lb. live weight (dressed weight approx. 48 lb.) sold on hoof for 18/6 per head, inclusive of 5/6 skin value.

Compiled. J.H. 30-5-'38
Drawn. E.H.S. 1. 6. '38
Checked. G.C. 1. 6. '38

A. A. WATSON,
DIRECTOR OF MARKETING.