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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.

Vol. 3

JANUARY, 1939.

No. 5

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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.

In this issue is an article dealing with the North Coast Statistical Division of the State. This is the first of a series of articles descriptive of the geographical, rural, industrial and certain other features of each of the fourteen divisions into which New South Wales is divided for purposes of recording areas and quantities of agricultural, pastoral and mining production and (in part) population. These divisions correspond very closely with the Meteorological Divisions of the State. The Map included in this issue takes the place of the usual graph, in this issue only, and is intended for reference in connection with the said series of articles.

on freight rates and prices.

4. Tasmanian potato crop promises well. Estimated exports for 1939 will reach one million bags compared with 1,105,000 in 1938. Sydney is the main market.
5. Sales of New South Wales wool for six months ended 31st December, 1938, totalled 624,245 bales, average realisations being 10.6d per lb., compared with 540,455 bales and 14.3d per lb. for similar period previous year. The respective total values were £8,391,031 and £9,651,409.

NOTES ON SHEEP AND LAMB SUPPLIES.

Fluctuating supplies of sheep and lambs give cause for some wonderment. They suggest that if it were practicable to regulate supplies there should be an all-round improvement. The word 'regulate' implies regimentation, unfortunately. Regimentation might be an easier pill to swallow, however, if coated with better average returns and it must be conceded that regulation of supplies would not be justified, if its benefits failed to include better returns to producers.

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HIGHLIGHTS.

1. The Royal Commission of Inquiry into the Fruit Industry of New South Wales is in its final stages and word is to hand of a similar Commission which has been inquiring re distress in the Fruit Industry of South Africa.
2. In Poland retail sales of eggs must be by weight, not number.
3. First cargo of maize ever to be exported from Australia to Canada arrived recently at Montreal and Quebec - further shipments depend on freight rates and prices.
4. Tasmanian potato crop promises well. Estimated exports for 1939 will reach one million bags compared with 1,105,000 in 1938. Sydney is the main market.
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Sheep and lambs are auctioned at Homebush Sale Yards (formerly known as Flemington), Sydney, on Monday and Thursday each week. On the Thursday immediately preceding New Year's Day, approximately 36,000 head of sheep and lambs were yarded: the following Monday being a public holiday, that yarding had to meet the requirements until the following Thursday, when approximately 64,000 sheep and lambs were penned for sale. Query: why 36,000 head when the next sale-day was a week away? Query: why 64,000 with the next sale-day only three days off and two of those Saturday and Sunday when killing at the Abattoirs is suspended?

What was the effect upon prices? On the Thursday which saw 36,000 head of sheep and lambs yarded, there was a gain in values of from Two Shillings to Four Shillings per head for sheep and from One Shilling to One Shilling and sixpence per head for lambs and hoggets. These substantial gains, it is regrettable to say, were entirely offset on the following Thursday when, as stated, yardings of sheep and lambs were in the vicinity of 64,000. On that day, recession of prices corresponded with the advance of prices on the previous Thursday, and the recession applied to almost double the number of animals. Admittedly, this was an exceptional fluctuation as to range, but reference to the records of yardings of sheep and lambs throughout the past twelve months reveals more than a few instances of fluctuations that could have been expected to adversely affect prices levels.

Notes of this description are not the place for complete or searching examination of cause and effect, but a little analysis may not be out of place. Purchasers of the 64,000 head bought with the knowledge that, with only one day left in the week for killing, they would necessarily have a substantial carry-over into the following week. They knew, too, that fresh yardings would be offered on the following Monday (actually 36,000 sheep and lambs came to hand) and realised that the carryover would have to be shifted into waiting paddocks (or shepherded in near-by localities) and fed and watered for at least two days. They realised, too, that the utmost care of the sheep and lambs thus held would not prevent falling-away of condition and out-turn of carcase weights (particularly as regards lambs). One would expect buyers to make due allowance for these considerations. Hence, no doubt, the recession of prices and the swallowing-up of the producing industry's gains of a week earlier.

On the face of it, there appears to be need for regulated instead of haphazard despatches to the Saleyards. As to the difficulties of regulation, one cannot say much here. Varying seasonal conditions in different parts of the producing areas of the State and varying degrees of ability on the part of producers to hold their stock would probably be outstanding among them. No doubt, too, there would be widely divergent personal attitudes towards such regulation and altogether the promotion of co-ordinated
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effort in this field could be expected to be as difficult as in many another. It is a fact, however, that, not infrequently, progressive industries find both ways and means of overcoming difficulties of the kind.

How is the consumer affected by irregular supplies of cattle and sheep? The consumer is affected through the consequent vagaries of retail prices. High prices in the retail butchers' shops reduce the average consumer's inclination or capacity to buy usual quantities of meat. It is true that we are a people accustomed to a relatively high ration or consumption of meat but, even with us, there are directly competing foods such as eggs, as well as others of a less directly competitive character, whose increased use may and not uncommonly does mean reduced consumption of meat. Apart from relatively high prices and not forgetting that occasionally the fluctuation carries prices below the average mean, it has always to be remembered that instability of retail prices makes for difficulty in household budgeting and prejudices the items concerned, as to their use by a great majority of citizens.

A.A.W.

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INCREASED SURCHARGE ON GOODS IMPORTED INTO NETHERLANDS INDIA.

The Secretary, Department of Commerce, Commonwealth of Australia, reports that advice has been received from the Australian Government Commissioner at Batavia to the effect that after January 1st, 1939, the surcharge on goods imported into Netherlands India will be increased from 25% to 50%. Thus the duty on Australian butter, instead of being 12% ad valorem, plus 25% surtax (= 15% ad valorem in all) as at present, will be 12% duty, plus 50% surtax, or 18% ad valorem.

The Australian Government Commissioner made representations to the Netherlands Indian Authorities in the hope that, in the case of butter, the surcharge would not be increased, and, in the case of flour, the reduced rate of 6% ad valorem would continue to operate. It is regretted, however, that these representations were unsuccessful. From January 1st, 1939, the duty on wheat flour will be 12% ad valorem, and, in accordance with the practice established in previous years, no surcharge will be imposed.

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PHYSICAL FEATURES AND PRODUCTION OF THE
NORTH COAST STATISTICAL DIVISION NO.1.

Introductory.

A general resume of the Statistical Divisions of New South Wales was published in the October, 1937, issue. It is now proposed to deal more fully with the particular divisions, commencing with the North Coast Statistical Division No.1. For the convenience of readers, a map of the State, showing each of the Statistical Divisions, is placed in the back of this number.

The area of New South Wales lying between the sea on the East and the Great Dividing Range to the West is substantially, though not wholly, its coastal section and that section extending over a distance of approximately 700 miles from the Queensland border in the North to the Victorian border in the South is divided into four Statistical Divisions, viz., the North Coast (No.1), the Hunter-Manning (No.2), the Metropolitan (No.3) and the South Coast (No.4). For the most part the Western limits of these coastal statistical divisions have been placed east of the main ridge or ridges of the Great Dividing Range and they vary in width from sea-shore to their respective western boundaries from an average of about 55 miles in the North Coast Division and an average of about 36 miles in the South Coast and Metropolitan Divisions to an average of approximately 80 miles in the Hunter-Manning Division. Apart from river flats, the characteristic topographical feature of this coastal section of the State is its undulating to hilly and mountainous terrain, well-watered by coastal rivers, of which the most important (proceeding from North to South) are the Tweed, Brunswick, Richmond, Clarence, Bellinger, Nambucca, Macleay, Hastings, Camden Haven, Manning, Wollomba, Karuah, Hunter, Hawkesbury, Shoalhaven, Clyde, Moruya, Tuross, Bega and Towamba.

North Coast Division No. 1.

Area, Population and Climate.

According to the New South Wales Year Book, the North Coast Statistical Division, which extends from the Queensland border to slightly south of the Macleay River, is contained in 26 local governing areas, consisting of 16 Shires and 10 Municipalities, the combined areas of which total 6,965,288 acres (= 10,883 sq.miles), of which 3,343,884 acres are alienated or in process of alienation; whilst 3,621,404 acres are unalienated Crown Lands. The holdings in this area include a proportion of unalienated Crown Lands held under lease as well as most of the alienated lands and comprise in all 4,737,858 acres. In 1936/37 approximately 129,000 acres were under crop and 1,625,000 acres carried sown grasses. At the time of the 1933 census the population was over 146,000. Some of the more important towns in order of population are Lismore (11,700), Grafton (6,400), Casino (5,300), Kempsey (4,800) and Murwillumbah (3,900). The climate of the North Coast is mostly sub-tropical; the winters are mild and, although humid weather is experienced in /the

the height of summer, there is an absence of extremes of heat or cold which makes this a climatically favoured region. The average annual rainfall ranges from approximately 37 inches at Grafton and Tabulam to nearly 80 inches in the vicinity of Byron Bay and Dorrigo. The mean temperature for the year is from 66 to 69 degrees, the summer mean being 75 to 77 degrees and the winter mean 56 to 59 degrees.

Dairying the chief Industry.

Foremost in the industries of this division of New South Wales is the dairying industry. The possibilities of the north coastal rivers and the area watered by them were first widely realised by dairy farmers of the South Coast of the State in about 1880. A substantial migration from the south to the north followed and since then dairying has advanced to become the most important industry in this section of the State. The considerable extent of rich pasture lands gives ideal conditions for the raising of dairy herds, whilst the moderate climate and ample rainfall are also extremely helpful factors in production. The manufacture of milk products in this division is considerable. Factories have been established at Kempsey, Ulmarra, Grafton, Casino, Lismore, Byron Bay and numerous other towns for the preparation of butter. There are also factories for other processed dairy products, such as cheese, condensed milk and casein.

Of the total of 98 butter factories in New South Wales, 37 are situate in this Division and the latter are responsible for more than half the annual production of butter in the State. The pre-eminence of this Division in relation to butter production in New South Wales may be illustrated in another way. If the 98 butter factories of the State be listed in order of production in respect of a recent period for which figures are available, eight of the first ten places are filled by North Coast factories.

Most of the dairying activities in this division occur within twenty or thirty miles of the sea, but large numbers of cattle are also grazed on the foothills and in mountainous country to the west, many of these being marketed for beef purposes. Pasturage, consisting in the main of *paspalum dilatatum* (but also including grasses such as couch, Rhodes, water couch, cocksfoot, rye, kikuyu and clovers) is normally available in the dairying areas throughout the whole year, though, of course, growth falls away considerably in the winter months. Fodder conservation, principally by the conversion of green crops such as maize, sorghum, etc., into silage, is receiving increasing attention, in order to provide reserves of feed for use in the colder months or during dry spells. It is not the practice to provide housing for dairy cattle in the winter, as in many other countries.

Maize the principal Crop.

On account of its value for fodder, maize is grown in nearly all areas where dairying is the chief industry. In the North Coast Statistical Division, maize production is second only

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to dairying in importance. The river flats are occasionally inundated by floods which supply a rich deposit of silt, forming a soil in which maize grows to perfection. Sufficient moisture is normally precipitated to help the growing crop, whilst at the period of maturity the maize is substantially assisted by the warm weather. The North Coast contributes almost half of the State's annual production of maize; in addition to some 48,000 acres for grain, a further 6,000 acres of maize were grown for green fodder in this division in the 1936/37 season. The largest maize-growing districts in this Division, in order of volume of production, are:- the Richmond, Macleay and Clarence River areas. Large quantities of maize are sent to the Sydney market each year, whilst local consumption for pig feed and fodder for other stock is even greater. In a good season yields of eighty and more bushels of maize to the acre are produced on river flats, and on less fertile soils, where maize is grown for farm consumption only, from thirty to forty bushels per acre can be obtained. The periods of maturity range from January to March for early maize and April to July for later crops.

Pig-raising of considerable importance.

Pig-raising may be regarded as the third industry in importance and is carried on more or less in conjunction with dairying and maize growing. The climatic conditions are, as a rule, particularly favourable to the production of well-developed and healthy swine. In this industry, New South Wales leads the other States and, in production, the North Coast division is the most important in New South Wales, over forty per cent. having been raised in that area in the seven years ended 30th June, 1937. Moderate numbers are marketed as pork but the curing of bacon and hams is by far the more important side of the industry. Over the ten years ended 30th June, 1937, the bacon and ham production of the North Coast was second only to the Metropolitan Division, which draws on other parts of the State for a great part of its live pig supplies. By using products of both dairying and maize-growing, the North Coast farmer is able to raise pigs relatively easily and economically. There is still scope for considerable extension in this industry, as it is by no means fully developed.

Banana culture a feature.

Of the primary industries which remain to be enumerated, banana-growing is possibly the most outstanding. The semi-tropical conditions which prevail on the North Coast are eminently suitable for the growing of this fruit; fertile hilly slopes with the advisable altitude above frost levels and within reach of sea breezes, are favoured sites for the plantations. A rapid development in banana culture was apparent in the Tweed River districts from 1914 to 1922 but between the latter year and 1927 a virus disease known as "bunchy top" almost destroyed the industry. Subsequent to 1927, however, a system of quarantine and rigid control enabled the industry to recover fully from the outbreak. According to the Official Year Books, Commonwealth of Australia, for the years 1934 to 1937 (the latest available) both the acreage under bananas in

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New South Wales and the value of the crop have been greater than the acreage and value of bananas in Queensland in the financial years 1932/1933 to 1935/1936, inclusively; previously Queensland had led the way in this respect. The major portion of the New South Wales production of bananas is grown in the districts watered by the Tweed, Brunswick, Richmond and Nambucca Rivers and in areas adjacent to Woolgoolga and Coffs Harbour.

Sugar Cane a valuable crop.

The lower portions of the Tweed, Richmond and Clarence sections of the North Coast division are notable for the production of the only sugar cane grown commercially in New South Wales; although the quantity is small in comparison with that produced in Queensland, considerably more could be grown and, as it is, the income from this industry is an appreciable contributor to the wealth of the districts mentioned. Actually, sugar-cane growing in Australia commenced here. For the decade ended 30th June, 1937, the average annual acreage of sugar cane harvested was 8,523 for an average return of £311,240 or £36.10.4 per acre. The cane harvested is crushed in the Colonial Sugar Refining Company's mills at Condong, Broadwater and Harwood, and the raw sugar shipped to Pyrmont, Sydney, for refining.

A present and potential source of wealth.

A highly important industry which must not be overlooked is timbergetting with its associated saw-mills. Notable among the earliest settlers of the Northern Rivers were timber cutters, attracted primarily by the abundance of cedar; as timber-cutting progressed, the country was opened up and the possibilities of the land for farming pursuits became apparent. Vast quantities of valuable timber have already been cut for milling and for railway sleepers, telegraph poles, etc., and even more destroyed as a preliminary to cultivation, so that the more readily accessible forests and scrubs have been depleted; nevertheless, goodly areas of original forest still remain, especially in mountainous sections between the Macleay and Clarence Rivers, of which the Dorrigo region is the most notable. On the spurs of the McPherson and Great Dividing Ranges to the north and west of Casino near to the Queensland border other valuable and extensive tracts exist. This North Coast Division possesses a greater variety of species of timber than any other part of New South Wales; the chief of these species are Hoop Pine, Cedar and Hardwoods such as Blackbutt, Tallowood, Spotted Gum, Flooded Gum and various Brushwoods. The Hardwoods constitute the bulk of the timber milled now-a-days, as the Cedar has been mostly cut out and what remains is chiefly in inaccessible localities, whilst the Hoop-pine has been considerably depleted. With the object of re-establishing the Hoop-pine forests, the Forestry Commission has a nursery at Brooklana, on the Eastern Dorrigo, for the propagation of seedling trees to be utilised in its reafforestation programme.

The magnitude of the timber-getting industry in the North Coast Division is illustrated by the Forestry Commission's figures of "Gross Timber Consumption" (expressed in superficial feet) for the year ended 30th June, 1937, for the Casino and West Kempsey Forestry Districts:-

	<u>Hardwood</u>	<u>Hoop Pine</u>	<u>Brushwood</u>	<u>Fuel</u>	<u>TOTAL</u> (Super.ft.)
Casino	30,689,620	13,168,987	5,540,047	10,302,125	59,700,779
West Kempsey	59,859,085	4,047,299	16,026,929	37,575,000	117,508,313

The boundaries of the Forestry districts do not correspond with those of the Statistical Divisions, but the Casino District lies principally within the North Coast Division, and the West Kempsey District, although extending south into the Hunter-Manning and west into the Northern Tableland Division, has its main timber country in the North Coast Division between the Macleay and Clarence Rivers.

Estuarian Fisheries.

The estuaries and ocean inlets of this richly-endowed Division figure importantly in the fishing industry of New South Wales; the largest fishing centres are based upon the Tweed, Clarence and Macleay Rivers. In addition to catering for local requirements, considerable quantities are shipped from time to time to Sydney and also to Queensland markets. Including prawns, crayfish, crabs and oysters, as well as fish, the average annual value produced in the five years ended 1937 (as recorded by the Fisheries Branch of the Chief Secretary's Department) was £99,467. By systematic and scientific exploitation of the ocean waters adjoining, that figure will doubtless be substantially exceeded in the future.

North Coast Potatoes supplement Sydney's supplies.

Still another important item of production, and one of the few remaining ones which can be treated here as a separate industry, is the growing of potatoes on the North Coast. As a general rule, the potato sowings take place in rotation with maize. The rich soils are well adapted to potato production and, with the assistance of regular rains, a good marketable product is usually ready by the month of October. Harvesting of potatoes is mostly completed by December when the ground is prepared for the late maize crops. The quantities produced are appreciable and coming, as they do, when other New South Wales stocks, as also Tasmanian shipments and Victorian supplies, are dwindling, they are a welcome supplement to potato supplies in the North Coast towns and on the Sydney market.

Numerous miscellaneous items of production.

Many other items deserve mention. Maize has already been the subject of a paragraph and reference should also be made to the large areas of other fodder crops grown for the use of the dairy herds and pigs, the chief of these in 1936/37 being Oats (10,000 /acres)...

acres), Rape, Sorghum, etc. (19,000 acres), Lucerne (5,000 acres) and Rye (2,000 acres), the produce whereof is utilised principally in the feeding of the stock on the farms. Various tropical fruits, such as pineapples, papaws and mangoes yield satisfactorily in selected localities. Pumpkins and onions are successfully grown, the latter mostly for local requirements. Other crops of importance include tomatoes, beans, cucumbers, sweet potatoes, swede turnips and passion-fruit. Broom millet is also produced. Mention of tomatoes is reminder that included in this Division are some of the most highly-favoured districts of the State for production of this popular product. Large and increasing quantities of high-grade tomatoes are grown, principally for the Sydney market, the production in 1936/37 amounting to approximately 122,000 half-cases. The facilities for passion-fruit production should also be noted as this fruit, like tomatoes, is the subject of growing demand. Considerable attention has been devoted in recent years to the cultivation of beans, heavy consignments of which are forwarded to the Sydney market from time to time. The edible nut commonly known as the "Queensland Bush-nut" (*Macadamia ternifolia*) is indigenous to portions of this Division of New South Wales and capable of fairly extensive cultivation for commercial production.

Popular with tourists and holiday makers.

This article would not be complete without mention of the scenic and holiday attractions with which the North Coast abounds. A rich endowment of river, sea and mountain scenery is generously supported by the exotic beauty of sub-tropical vegetation and plant growth. In such environment, the various farming activities have added attraction and towns and villages a distinctive appeal for tourists. The numerous seaside resorts are very popular with visitors from other centres of the State, as well as from Victoria and Queensland.

Schedules of Production and Livestock.

The following schedule, compiled from the New South Wales Statistical Register, shows the average annual quantities of the various primary products of major importance which were produced in the North Coast Statistical Division during the five year period ended 30th June, 1937:-

North Coast Division - Average Annual Production Five Years ended 30th June, 1937.

Dairy:			
Butter	..	68,891,339	lbs.
Cheese	..	885,962	"
Bacon and Hams	..	8,600,719	"
Maize	..	1,404,615	bushels
Potatoes	..	4,756	tons
Other Root Crops	..	1,801	"
Bananas	..	908,065	cases
Sugar Cane	..	234,160	tons
Tomatoes	..	92,372	½-cases
Beans and Peas (Value)	..	£13,636	
Fish	..	3,926,639	lbs. /An

An estimate only is possible of the value of the foregoing production. On the basis of last year's wholesale prices levels in Sydney for the commodities previously mentioned, with timber added, a total of £7,250,000 is suggested as a possible approximation of total value.

Based on figures published in the Statistical Register, the average annual numbers of livestock in this Division over the same period were:-

Horses	53,275
Cattle - Cows in Registered Dairies	529,281
" - All Other	322,026
Pigs	164,212

A.A.W., C.K. & T.McK.

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DOMESTIC MARKETING REGULATED IN BRAZIL.

According to a recent issue of "Foodstuffs Round the World", Decree Law No.620 of August 17, 1938, regulates the organization of fruit and vegetable markets in the principal consuming centres of Brazil, and creates the entrepot for the Federal District. These marts will promote, under commercial classifications, the sale, storage and preservation of fruit and vegetables. Products to be sold in the surrounding areas must pass through the established markets, excepting those intended for industrialization or which may be sold at retail by small registered producers. Official supervisors will condemn all products considered unsuitable for consumption and industry.

To regulate the market supply, fruit and vegetables will be warehoused in cold storage. Existing cold storage facilities as well as any market centres or cold storage plants subsequently organized by co-operative associations or companies, as provided for by the Decree Law, will come under the supervision of the Ministry of Agriculture. Other than for cold storage, charges will not be imposed on products for the obligatory inspection and commercial classification. Buying and selling, wholesale or retail, will be carried out by official auction. Only small producers duly registered at the Ministry of Agriculture will be permitted to sell at retail.

By the terms of the Decree Law, companies desiring to erect cold storage plants for warehousing fruit and vegetables will be exempt from taxation and will be granted facilities for importing necessary refrigeration equipment. Speculative operations, monopolies, and the retention of products either within or outside the areas of distribution will be prohibited. The market will maintain a service for the publication of bulletins containing quotations and the details of auctions. The Decree Law further states that the Government will order the revision of taxes and charges relating to fruit and vegetables in order to lower selling prices.

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A SURVEY OF SOME OF THE METHODS ADOPTED FOR
FINANCING MARKETING ORGANISATIONS OR SCHEMES.

In the three instalments of this article already published, the methods adopted for the financing of marketing boards in New South Wales and similar organisations in Queensland and Great Britain have been dealt with. The series is now concluded (following visit of Director of Marketing to Melbourne) with a survey of the principal features of the financial provisions of the Marketing of Primary Products Act, 1935, of Victoria, and their application by the Marketing Boards constituted under that Act.

Victoria - The Marketing of Primary Products Act, 1935:

In December, 1935, the State of Victoria passed an Act resembling closely but not completely copying the New South Wales Marketing of Primary Products Act, 1927-1934. The financial provisions of the Victorian Act depart substantially from the New South Wales model. They include one whereby a Board may arrange with the Treasurer of Victoria for advances to cover expenses of formation and administration incurred prior to the receipt by the Board of the commodity in relation to which it is established. Under subsection (i) of Section 18(1) of the Victorian Act a Board is permitted to deduct from the net proceeds of the sale of the commodity in respect of which it is established, an amount not exceeding one half-penny in the £ of such proceeds for the purpose of establishing a reserve fund to be used for any purpose in connection with the operations of the Board. Under Section 32(1) a Victorian Marketing Board is empowered, with the approval of the Governor in Council, to make a levy on, and to be paid by, the producers of the commodity controlled by the Board in such amount or at such rate and to be paid by such persons and on such basis and for such period or otherwise as the Board, "with the approval of the Governor in Council and by notification in the Government Gazette, specifies", and "may in any case where it thinks fit retain the amount of such levy out of the funds in its hands arising from the sale or pledge of the commodity".

Still dealing with the Victorian Marketing Act, the proceeds of any levy imposed under Section 32(1) are to be paid to the credit of a special account in the books of the Board and applied:-

- (a) In payment of such administrative expenses of the Board as the Board from time to time determines.
- (b) In payment of any advances made to the Board for the purposes of the Act.
- (c) In establishing and maintaining a fund for effecting insurances against pests, fire, hail, flood or other casualty.

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- (d) For use in co-operation with the Department of Agriculture or any other Government Department in its instructional or experimental work in connection with the commodity in relation to which the Board is constituted.

The Chicory Marketing Board of Victoria:

In a recent majority decision of the High Court of Australia in the case of Matthews v. Chicory Marketing Board of Victoria (two out of the five Justices who heard the case dissenting) the imposition of any levy in accordance with Section 32 of the Victorian Marketing of Primary Products Act, 1935, was held to be invalid by reason of the provisions of Section 90 of the Constitution of the Commonwealth of Australia, which stated that the power of the Commonwealth Parliament to impose duties of customs and of excise, and to grant bounties on the production and export of goods should become exclusive, etc. The levy by the Chicory Marketing Board of £1 per half-acre on all areas in Victoria planted with chicory during the year ended 30th June, 1937, was held to be in the nature of an excise duty. It is understood that this judgment could be the subject of appeal to the Privy Council and it will be interesting to learn whether any such action is contemplated or taken.

Three other Marketing Boards have been constituted in Victoria, namely, the Onion, Egg and Maize Marketing Boards, respectively.

The Egg and Egg Pulp Marketing Board of Victoria:

This Board which was established on 10th February, 1937, consists of four members elected by the producers and one member nominated by the Government. After approximately six months organising to enable the control of the industry to be changed with a minimum of inconvenience to all concerned, the first pool was launched on 16th August, 1937, on which date all eggs produced in the State of Victoria were divested from the producers and became vested in the Board; owners of 25 hens or under were exempted from the operations of the Act.

As this Board does not own or conduct a selling floor, eggs are received, candled, graded and sold on its behalf by 28 approved merchants acting as its agents. The Board determines the prices at which eggs, in their prescribed grades, shall be sold locally. It grants (or withholds) producer agencies entitling poultry farmers to sell direct, under prescribed conditions, and conducts the pooling activities implied in the Act. The Board determines an estimated quota of eggs for export and instructs its authorised Agents to submit every egg of a quality suitable for export for examination by officers of the Department of Commerce.

The Board's Agents remit direct to the producers net advances on all eggs received, such net advances consisting of the market price, as determined by the Board from time to time, less the approved deductions of:-

1d per dozen Pool Deduction.
 $\frac{3}{4}$ d " " Grading Charge.
 4% Selling Commission.

The Producer Agents, who number approximately 3,000, are required to furnish to the Board monthly returns of their sales, and to forward with each return pool contributions at the rate of one penny per dozen eggs sold.

Inclusive of the Producer Agents, but exclusive of owners of 25 hens or under (who are exempt), the producers sending their eggs through the authorised channels number 20,000. Of the eggs marketed, the Board's Agents handle approximately 75% and the Producer Agents the remaining 25%.

The administrative expenses of the Board, together with various stabilising and equalisation costs of the Pool, are met from the 1d per dozen Pool Deduction (or contribution) deducted by the authorised Agents or remitted by the Producer Agents. The First Annual Report of the Board shows that for the 1937/1938 Pool, covering a period of 46 weeks from 16th August, 1937, to 2nd July, 1938, Pool contributions totalled £67,743.13.2, whilst Expenditure, etc., amounted to £42,756.9.7, leaving a surplus of £24,987.3.7, from which it is proposed to pay producers a final advance of one-third of a penny per dozen on eggs supplied to the Pool. The total production for the Pool was 16,258,478 dozen, of which 3,400,200 dozen were exported overseas in shell, the equivalent of 182,066 dozen was exported overseas in pulp, while 12,676,212 dozen were sold on the local market, either in shell or pulp form. The average prices paid and the marketing costs, etc., were stated to have been:-

	Pence per dozen
Average gross price for all grades	14.58
Less Marketing Costs	.44
	<hr/> 14.14
Board Agents' charges for grading, selling, commission and cleaning	1.37
Board's expenses	.19
	<hr/> 1.56
Average net return to producers	<hr/> 12.58

The Victorian Maize Marketing Board:

With jurisdiction over the whole of that State, this Board also consists of four growers' representatives and one Government representative, who hold office for a period of two years. The Board does not conduct a selling floor, but appoints two agents only to act on its behalf, allowing $2\frac{1}{2}\%$ commission to those agents, who pay $\frac{3}{4}\%$ commission to country agents who inspect samples, arrange deliveries, threshing and truckings. The City
 /agents....

agents pay a first advance against the maize to the growers. The difference between the advance paid to the growers and the price realised is transmitted by the City agents to the Board and out of that balance the Board's running expenses are deducted, the surplus being distributed amongst the producers as a final payment. Should it be found necessary to store maize, the Board receives an overdraft from its bankers.

The Onion Marketing Board of Victoria:

A poll of producers held on 3rd February, 1936, being in favour of its establishment, this Board was constituted on 26th March, 1936, to control the marketing of onions throughout the State of Victoria. Consisting of four members representing the producers and one Government representative, the Board has a two year tenure of office, the present one being appointed as from 5th April, 1938. A poll of producers held on 2nd December, 1938, favoured the continuance of the control of the industry by the Marketing Board.

Onions produced in the State are vested in the Board and are received at depots situated in the chief centres of production, where they are stored in racks and trays for bagging and delivery as required to fulfil orders. The growers receive a first advance payment on delivery, and subsequent payments according to the surplus accruing from realisations after the various costs of administration, handling and marketing expenses have been deducted.

As the onions sold later in the season have to be picked over periodically, the costs incurred are heavy. Moreover, a considerable proportion of the onions produced in Victoria has to be exported to other States, principally to New South Wales, but limited quantities are purchased by South Australian and also New Zealand buyers; the Board sells the exported onions on an f.o.b. Victorian port basis. These two factors complicate the marketing of this product, and also render it necessary for the Board to arrange financial accommodation (on the security of the onions vested in the Board) to meet the advance payments to growers and the administrative and marketing expenses prior to sales being effected; this accommodation is liquidated from subsequent realisations. As the onions received each season are handled on the pooling system, total costs are debited pro rata and realisations credited similarly.

The Onion Marketing Board has endeavoured to popularise onions, and conducted an advertising campaign in Sydney and elsewhere during 1937 by radio, posters, recipe booklets, etc.

C.K.

SHEEP AND CATTLE SALES AT HOMEBUSH, SYDNEY.

Sheep and lambs fairly plentiful:

Despite the protracted spell of heat wave conditions during the month of December, supplies of sheep and lambs at Homebush Saleyards were moderately heavy, totalling 316,819 head, or over 13,000 more than the number penned in November. This total, however, represented a decrease on that for December, 1937, when 333,365 head were yarded.

Graziers generally experience unfavourable year:

The year just past has been unfavourable in so far as the fat sheep and lamb industry of New South Wales was concerned and to say that it has passed through a very difficult time would not in any manner be overstating the situation. Graziers experienced many setbacks but perhaps the worst were the drought conditions which prevailed and the incidence of the grasshopper. In quite a number of districts flocks were considerably reduced by mortality during the drought. Again, too, the lamb drop was far short of that of normal years, so that consignments of sucker lambs to Homebush decreased and, in many instances, lacked the bloom so desirable in this class of lambs. That the country, particularly those areas from which supplies of mutton and lamb for Sydney's requirements are principally drawn, is passing through another dry spell is evidenced by the fairly large numbers of sheep and lambs submitted which were only in fair condition, the suckers and lambs showing lack of condition far more than the grown sheep. Quite a few of the lambs offered were affected with grass seeds and also were very "dry". Apart from odd consignments of good to prime suckers from more favoured centres, very few lines showing quality were available. At this stage it would appear that the peak of the lamb season is past but, provided rain is received to freshen pastures and promote a new growth of herbage, there is still a possibility of an improvement in quality from those districts where the lamb drop was late.

Standard of offerings shows slight improvement:

Although a slight improvement was noticeable in the general quality of the pennings during December, they could by no means be classed as good. Plain and fair trade sheep were forward in fairly large numbers while the percentage of good to prime light and heavyweight sheep was only small. The bulk of the supply comprised shorn descriptions, the fleeces ranging from a quarter to third wool with occasional lines of full woolled. The absence of prime heavy sheep in no way affects the local trade but makes it difficult for exporters to fulfil quotas. Most lines of good to prime heavy sheep were absorbed by those interests operating in near country districts. As was the case during November, suitable trade weight mutton was plentiful but the quality was by no means all that could be desired, being mainly on the plain side.

/Irregular

Irregular market for grown sheep:

The market throughout the month was decidedly irregular, several rises and falls of 1/- to 1/6 per head occurring in grown sheep. After the Christmas vacation, when the last sale during December was held, one of the strongest markets experienced at Homebush for some considerable time ruled, values for grown sheep advancing by 2/- to 4/- per head or an increase of from 1d to 1d per lb. on carcase price. The main contributing factors to this sharp rise were the absence of sales for more than a week and the shortage of mutton supplies at the Abattoirs; thus buyers were particularly eager to secure their requirements and competition from all operators was very strong; furthermore, the supply of sheep was relatively small in view of the fact that there would not be any further sales for another week. During December best quality wethers sold to 18/- per head and ewes to 15/-, with a large proportion of the stock forward making from 8/- to 12/- each. For the most part, rates for wether and ewe mutton ranged from 1³/₄d to 3d per lb., according to weight and quality, the most usual figure being from 2d to 2³/₄d, but, when prices made the sudden upward move, buyers paid to 3³/₄d per lb. for ewes and to 4d per lb. for wethers.

Values of suckers, lambs and hoggets remain steady:

In direct contrast to the sheep market, values of suckers, lambs and hoggets were remarkably steady and did not vary to any great extent for the better grades. Fair to plain lines, however, were at times a little easier to buy, but the gain in buyers' favour was only small. Some of the best lambs penned realised to 24/- per head but round about 20/- each appeared to be the most usual price at which good lambs sold. Other classes made from 12/- to 17/- per head and a good number entered local trade channels at this level. Rates per pound for the carcase were mainly 5³/₄d to 6³/₄d for good quality suckers and 5³/₄d to 5³/₄d for fair to plain descriptions. Odd sales of outstanding suckers were made at the satisfactory figure of 6³/₄d per lb. Summer lambs made to 5³/₄d but regular prices per pound for this grade of lamb were 4³/₄d to 5³/₄d. Hoggets were never at any time heavily yarded and when available were chiefly of good quality; rates per pound mostly were 3³/₄d to 4³/₄d with a few lines realising 4³/₄d.

Downward trend apparent in skin market during 1938:

The skin market did not vary to any great extent during December and the reflex on the values obtained for sheep and lambs was only slight. For the 12 months ended 31st December, 1938, 4,091,033 skins were sold as compared with 3,448,875 for 1937, which indicates a substantial gain in the year's operations. Prices for skins were at their best in January when the top rate for merino was 12³/₄d per lb. and for crossbred 10³/₄d. Another phase of this market, which is so closely allied to the Homebush values of sheep and lambs, is that, apart from the months of July and August, when prices temporarily improved, rates showed a generally downward trend throughout, the lowest level being reached during May and June.

/More....

More favourable pastoral conditions required:

The year as a whole has been a most difficult and hard one for the meat producers in general and it is to be hoped that in the New Year conditions will be more favourable, so that graziers will be in a better position to improve the quality of the stock consigned to Homebush, for it is only by producing good quality sheep and lambs and marketing better stock that an increase in home consumption can be achieved and a greater share in overseas markets secured.

Supplies of cattle still on the increase:

Increased numbers of cattle continued to arrive at Homebush, supplies for December, when eight sales were held, exceeding those of the previous month by upwards of 3,500 head. The percentage of Queensland stock was considerably smaller, amounting to approximately 600 for the whole period as against 1,500 for November. There were slightly more bulls and stores auctioned, the total figure being in the vicinity of 2,500. For the same period last year (1937) supplies were lighter, while the quality was much below the standard seen during this month.

Quality fairly satisfactory but not as good as during November:

For the most part, good to prime cattle were rather difficult to secure but, with the exception of odd sale days, buyers were able to purchase cattle of very suitable trade weights and at the same time showing fair condition. On the days when they were available, Queensland cattle proved a valuable addition and, although not suited to all operators, competition for them was always keen. The proportion of plain descriptions was high, particularly so with cows, heifers and young cattle. What can be expected in the New Year is pure conjecture but with present pastoral conditions not at all pleasing, the outlook for continued supplies of fat stock is not very bright.

Light to medium weight bullocks and steers well in evidence:

At the two sales prior to the Christmas holidays and the last sale of the month many very attractive drafts of bullocks and steers were noticed; earlier in the period, however, it was sometimes difficult to find more than occasional pens showing anything like quality. Keen buying was a feature at various times, as was evidenced by sales held on separate days and conducted by independent selling agents. The cattle referred to were mostly bullocks of medium to heavy weight and of fair to good trade description, with odd pens approaching prime grade. The number sold on each occasion was over 100 head and average realisations in the first instance showed only a difference of one penny per head, while the figures for the later sale varied by 8/- per head. In the latter case, the general consensus of opinion was that the higher price truly indicated the slightly better quality of the consignment. This steadiness in values, however, was not always apparent, fluctuations being often noticed which would be

/hard.....

hard to explain and which tend to make the task of the owner no easy one when seeking to market stock at the most favourable time.

To illustrate this point, two sales have been selected as typical of what occurs from time to time. Early in the month a very attractive consignment of about 40 Shorthorn steers was auctioned; they were about 3 years old and outstanding examples of breeding and finish. The price paid for the heaviest of the draft was £12.4.0 per head, whilst the equivalent rate on a per 100 lb. basis for the complete number was approximately 37/-. Just over a fortnight later steers of the same breed, slightly heavier and a little older but nevertheless comparing very favourably with the earlier line, brought only 34/- per 100 lb. Had these latter been offered three days later, it is practically certain that they would have realised at least £1 per head more.

Cows and heifers generally lacking in quality:

Cows and heifers were well represented throughout but unfortunately plain and medium lots predominated and, as the supply of beef of this type was plentiful, a depressing effect on values was the immediate result. Towards the end of December, improved quality animals were more in evidence and the general briskness of competition was responsible for a recovery which was not altogether expected. In some places, cows especially were about £2 per head dearer at the close than at the lowest part of the market earlier in the month. Some good to prime Hereford cows disposed of on 29th December realised an average price of £9; weighing 540 lb. to 550 lb. the rate on the hoof was 33/- per 100 lb. A similar line sold on 12th December made approximately 30/- per 100 lb.

Good vealers in demand:

Nothing particularly outstanding in vealers and yearlings was available but the showing, both as regards numbers and quality, was very fair. During the time when other cattle were selling at lower values, the effect on this class of beef was proportionate and at times very young calves were purchased at surprisingly cheap rates but of course these were never more than just fair trade beef. As usual, good to prime vealers and young heifers were in demand at high levels and for those that could correctly be described as vealers, from 40/- to 44/- per 100 lb. of beef covered the variation in the top range of prices for the month.

Market weaker early but closed very strong:

The market during the period was subject to fluctuation. The decline which was gradual throughout November continued well into December; good cattle were not greatly affected, except in a few instances but in places fair to good trade lines declined up to 40/- per head in value, with still further depreciations noticeable for plain descriptions. Towards the end of the month, however, as previously pointed out, buyers were very active, some of the bigger operators purchasing freely practically all types of cattle. The effect on prices was pronounced and at closing very satisfactory realisations were general.

G.C. & A.T.

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

Firm market for Potatoes:

The outstanding feature of sales of potatoes during December was the very good demand ruling for all varieties. As a shortage of vegetables was in evidence, supplies of potatoes in Sussex Street passed from first hands soon after being landed, while at Alexandria, swift clearances of tubers were effected at every auction held during the month.

Arrivals of Tasmanian potatoes (17,964 bags) were much heavier than during November and, for the most part, comprised New Bismarcks which were quoted early at £15, later firming to £16 per ton. Brownells, which came to hand during the first week of December only, constituted the balance of the Tasmanian stocks and moved out satisfactorily at £13. Prices for the light shipments of Queensland New potatoes, aggregating 425 bags, were fixed at £12 to £13 per ton. Sales for the 16,100 bags of Western Australian Delawares were firm at £13 to £14; the market for this variety was better at the end of the month than in the initial stages but agents were able to sell consignments rapidly throughout.

Growers from the Northern River districts of New South Wales consigned only 1,933 bags of potatoes by sea to Sussex Street, representing a marked decline in the total for November. Auction sales were held early in the month and realisations were £9 to £13 for new grade, £2.15.0 to £6.10.0 per ton for No.2 grade and 1/3 to 4/6 per bag for Chat grade. As only limited quantities were available later, disposals were effected by private treaty at £13.10.0 per ton for the New Grade tubers.

Supplies of New Potatoes railed to Alexandria from New South Wales centres totalled 27,058 bags. Although 3,644 bags of these were withdrawn for reconditioning, the general quality of most lines offered was good and a large percentage of these stocks was in greater request and realised higher prices than supplies sold in Sussex Street. A large number of buyers attended throughout and stocks cleared satisfactorily at the following rates:- New Grade, Medium and Small £6.3.4 to £11.0.0, Good £11.5.0 to £14.0.0, Choice and Extra Choice to £18; No.2 Grade from £3.0.0 for inferior to £15.15.0 per ton for choice and 6/3 to 10/3 per bag; and Chat Grade 2/- to 14/- per bag according to quality. A small consignment of 56 bags of new potatoes from Queensland was railed to Alexandria and brought £11.10.0 per ton at auction.

Heavier arrivals of Victorian Onions:

The market for Victorian onions in Sussex Street was good. Arrivals, totalling 7,450 bags, were greater than those for November and were mostly of the Brown Globe variety, only a small number of Whites coming to hand in the concluding stages. Clearances were excellent and prices showed a marked increase, being £15 to £20 for Brown Globes and £20 to £22 per ton for White onions. Queensland
/growers...

growers forwarded 4,100 bags, including Brown and White varieties, by sea to Sussex Street; request for both was good and sales were effected at higher rates. Brown onions were quoted early at £14 to £15 and, as the month came to a close, were clearing rapidly at £18 per ton. White onions opened at £14 to £15 and, like Victorian Whites, were in demand later at £18 to £22 per ton. The request for the 500 bags of South Australian White onions received in Sussex Street was satisfactory and deliveries were made at from £20 to £22. Stocks of onions at Alexandria comprised 977 bags of locally produced Brown and White and 200 bags of Victorian Brown Globes. Both offerings were well within buyers' requirements and were disposed of readily at the following quotations:- Victorian Brown Globes £20; Local - Brown £14.11.8 to £15.10.0, White £8.0.0 to £16.10.0 per ton, according to quality.

Supplies of Pumpkins increase:

As was the case during the previous month, the entire stock of pumpkins available in Sussex Street (9,744 bags) and at Alexandria (18 trucks) was of Queensland origin. Offerings were heavier than in November and early sales were recorded at slightly lower rates. As the month progressed, however, the request improved and prices showed a decided upward trend. In Sussex Street, £6 per ton was obtained for the first sales but values later increased to £9. At Alexandria, stocks met a similar demand to that prevailing on the wharves and brought from £5.10.0 to £11 per ton.

Tasmanian growers consigned 629 bags of swedes to Sussex Street, these realising from £11 to £14 per ton. Only limited quantities of Tasmanian Blue and Grey Dry Peas were available in Sussex Street and, towards the close of the period, vendors stated that the market was practically bare of both the Blue and Grey types. Sales of both varieties were made at 9/- to 9/9 per bushel.

Quiet demand for Oaten Chaff:

The 247 trucks of oaten chaff railed to Alexandria were slightly in excess of the quantity received the preceding month. Demand was slow and agents found difficulty in disposing of stocks at lower rates than those quoted during November. The quality of the yardings was mixed and some lines again showed signs of weather stain. Medium grade and stained lots were disposed of at £4.10.0 per ton while choice realised up to £6.12.6.

Lighter yardings of Wheaten Chaff:

A limited request prevailed for the smaller railings of wheaten chaff, amounting to 48 trucks, and only portion of the supplies was cleared. Prime quality met a fairly steady market, bringing up to £5.10.0 in small lines but, the majority of the yardings being of medium to good grade, it was necessary to accept from £4.0.0 to £4.15.0 per ton in order to maintain deliveries.

/Prime.....

Prime Lucerne Chaff in satisfactory request:

Although the quantity - 93 trucks - of lucerne chaff received at Alexandria was practically the same as for November, rates for prime quality showed an increase and satisfactory sales of this grade were recorded at up to £7.15.0 per ton. However, only fair disposals of the remainder were made at from £5.0.0 to £7.0.0, according to quality.

Lucerne Hay still heavily supplied:

Generally speaking, the inquiry for lucerne hay in both selling markets was fairly steady and good clearances of prime quality were effected. Heavier stocks were available at Alexandria, 99 trucks of New Green and Dry hay arriving from the Maitland district and 93 from other centres. Demand for the Maitland supplies was steady and stocks moved out at £2.15.0 to £7.0.0 per ton according to the quality and the amount of moisture present in the bales. Mature lucerne hay consigned from centres other than Maitland also met a reasonable request at from £4.10.0 for medium quality to £8.0.0 for prime dry. In Sussex Street, larger shipments of Hunter River New Green Hay were received but vendors reported satisfactory deliveries at £3.15.0 to £6.5.0 per ton.

Disposals of Oaten Hay satisfactory:

Victorian growers consigned 79 bales of oaten hay to Sussex Street and sales were recorded at the unaltered rate of £11.0.0 per ton. Only a small portion of the 38 trucks on hand at Alexandria was submitted to buyers, the bulk being taken direct to stores; from £5.10.0 to £8.10.0 per ton was obtained for that offered.

Prices of Straw decline:

The 15 trucks of local Straw consigned to Alexandria cleared steadily at from £4.0.0 to £5.0.0 per ton. The market for the larger stock of Tasmanian straw on offer in Sussex Street - 6,420 bales - was a shade easier than during the previous month, the reduced rates of from £4.10.0 to £5.0.0 per ton being quoted.

Grain still selling slowly:

The 120 trucks of wheat on hand at Alexandria were more than sufficient for buyers' immediate requirements and agents were obliged to accept lower prices than those ruling during November. Realisations ranged from 1/10d to 2/10d per bushel.

The maize available at Alexandria consisted of 987 bags of Local Yellow and 809 of Queensland Yellow. Sales were made at the following rates:- Local Yellow 4/6d to 4/9d (Choice 5/-); Queensland Yellow 4/6d to 4/9d per bushel. Gradual clearances of the 530 bags received by sea from the Coastal districts of New South Wales were effected, supplies from the North Coast bringing

/4/4d

4/4d to 4/6d per bushel for large grain and 4/6d to 4/8d for small grain varieties, whilst Illawarra stocks realised 4/6d to 4/9d.

Of the 88 trucks of oats which arrived at Alexandria, only limited quantities were sold and prices were lower at 2/3d to 3/6d per bushel.

Seven trucks of barley were in position and realised from 2/4d to 2/6¹/₂d per bushel by auction.

E.A.G.

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TRADING IN FRUIT AND VEGETABLES AT THE CITY MUNICIPAL MARKETS.

Trading in both fruit and vegetables generally was very satisfactory throughout the greater part of the month, particularly just prior to the Christmas holidays when retailers bought heavily in anticipation of increased business during the festive season. Contrary to expectation, however, retailers, almost without exception, found business very dull during the period and clearances were not satisfactory. As a result, trade requirements were limited when the market re-opened on Wednesday, 28th December, and demand continued to be slow during the few intervening days before the New Year, with values generally lower.

Scarcity of Summer Fruits.

During the month of December there is usually an abundance of summer fruits such as peaches, apricots, plums and nectarines, while the early varieties of apples such as Mobbs Royal, Carrington, etc., make their appearance on the market in fairly large quantities, particularly from the County of Cumberland and nearby coastal districts. This year, however, unfortunately for growers in these areas, a terrific wind storm which reached hurricane force was experienced on Saturday, 10th December, and caused widespread damage resulting in a shortage of stone fruits. The position was relieved to some extent by the receipt of consignments of plums and peaches from Victoria, but only temporarily as supplies from this source were much smaller than was anticipated.

High prices for quality Apples.

With only relatively light shipments of apples forward from Tasmania and Victoria to supplement the limited quantities from New South Wales districts, supplies on the Sydney market were smaller than for a number of years. Local Granny Smiths and Delicious continued to realise high prices while values of Democrat and Yates which constituted the bulk of the interstate consignments showed a gradual improvement as available quantities decreased. Carringtons and new season cookers made their appearance about the middle of the month but were mostly of small size and a large proportion of the receipts was wind-falls which were difficult to
/dispose....

dispose of. Clearances of choice fruit, however, were readily effected and very satisfactory prices were realised.

Market for Stone Fruits generally satisfactory.

Stocks of peaches and plums were fairly plentiful early in December and small fruit became rather difficult to sell. Choice fruit, however, moved out readily but prices generally were about 2/- per half-case lower. Following the disastrous wind storm on 10th December, which was responsible for an estimated loss of approximately fifty per cent. of the stone fruit crops in early districts, supplies were considerably lighter and values showed a steady upward trend. About a week before Christmas considerable quantities of both plums and peaches came to hand from Victoria and this had a temporary steadying effect on the market but during the few days prior to the holidays trading was buoyant and clearances were effected at very satisfactory prices.

Nectarines were moderately supplied and choice large fruit sold freely at prices ranging to 12/- per half-case with odd sales at higher rates.

As a result of large quantities of apricots coming forward from inland areas to augment supplies from local districts, prices declined by about 1/- per case but were then fairly steady throughout the remainder of the period.

Cherries were in light to moderate supply but sufficient to meet all requirements. There was fairly keen competition for the best quality St. Margarets and Florence and a relatively high average price was obtained throughout the month.

Upward trend in Orange values.

Vendors of Valencia oranges found it somewhat difficult to dispose of small fruit during the first week but later with steadily shortening supplies all sizes moved out more freely and values showed an upward trend. It would appear that in a number of coastal districts the bulk of these oranges have been marketed and reports from the Murrumbidgee Irrigation Area disclose that there is only a limited quantity of fruit to come forward. Generally firm rates prevailed at closing and realisations for selected packs were very satisfactory.

Lemons generally were rather slow of sale and demand centred principally around choice, cured or well-coloured fruit of small to medium size. Clearances, however, were much better than during the previous month and values showed an improvement of about 2/- per case over the period. The relatively small consignments of Grape-fruit forward from New South Wales districts were in request and up to 16/- per case was realised for standard grade fruit.

/Bananas....

Bananas and Passion-fruit heavily supplied.

During the first fortnight bananas were heavily supplied and stocks of ripe and inferior fruit found little demand, even at low prices. This had a depressing effect on sales generally and values depreciated. Although heavy consignments continued to come forward supplies of lower grade descriptions were subsequently cleared and the market showed a substantial improvement, both as regards prices and disposals.

Comparatively small quantities only of pineapples were received from Queensland early in the period and higher prices, ranging to 18/- per tropical case, were realised; although greatly increased quantities came to hand later these improved rates were well maintained.

Passion-fruit were heavily stocked and a gradual depreciation of values was apparent.

Adverse weather affects vegetable supplies.

Owing to the continued hot, dry weather, green vegetables, particularly peas, beans and cabbages, were in light supply and quite a small percentage was of choice quality. Of the choice peas available, those from New England districts predominated, the conditions being more favourable in these localities. The bulk of the supplies from other areas was for the most part of only poor to medium quality. Choice lots were in request throughout and prices showed a steady upward trend, the peak being reached just prior to the Christmas holidays when 18/- and, occasionally 20/- per bushel was secured.

Early in the month the best quality beans obtainable realised only 8/- per bushel but, with rapidly lessening supplies, values gradually improved. Retailers competed freely for choice lines for the Christmas trade at rates ranging to 20/- per bushel.

Cabbages and Tomatoes sell well.

Cabbages sold particularly well during the month considering the hot weather conditions prevailing and prices obtained were most satisfactory.

Tomatoes were plentiful during the first week of the period but later available stocks from New South Wales districts were only moderate. Considerable quantities came to hand from Victoria in bushel cases but, as these were inferior both in type and quality to those produced in this State, did not offer any serious competition. Choice locals, both green and firm, coloured descriptions met a good inquiry throughout and, while prices showed marked fluctuations, rates generally were quite satisfactory.

E.J.C.

WHOLESALE PRICES OF VARIOUS COMMODITIES IN
SYDNEY (N.S.W.) DURING DECEMBER, 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 December, 1938:-

<u>Commodity</u>	<u>From</u>	<u>To</u>
Wheat:		
Bulk - old	2/2 ³ / ₄ d	2/5d per bushel
" - new	2/4 ³ / ₄ d	2/6 ³ / ₄ d " "
Bagged - new	2/5d	2/7 ³ / ₄ d " "
Flour	£7.10.0	£13.5.0 per ton
Bran £5.0.0 per ton)	no variation.	(including £5.15.0 tax)
Pollard £5.0.0 " ")		
Eggs (Hen)	1/2d	1/4d per dozen
Butter:		
Choice 161/2 per cwt.)	no variation.	
First Quality 156/6 " ")		
Second Quality 151/10 " ")		
Cheese:		
Loaf 11d per lb.)	no variation.	
Large 10 ¹ / ₂ d " ")		
Special Brands	1/0 ¹ / ₂ d	1/1d per lb.
Pigs (Abattoir Sales):		
Prime light porkers	33/6	45/6 per head
" med. wgt. "	38/6	55/6 " "
" heavy "	45/6	57/6 " "
" baconers	55/6	73/6 " "
Backfatters	£4.15.0	£8.7.6 " "

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SYDNEY WOOL SALES - DECEMBER, 1938.

The Sydney Wool Selling Brokers' Association advises that 95,227 bales of wool, including 91,743 greasy and 3,484 scoured, were sold in Sydney during the month of December.

The average prices realised were as follow:-

<u>Class of Wool</u>	<u>Per Bale</u>	<u>Per lb.</u>
Greasy	£13.12. 8	10.9d
Scoured	16. 0. 4	16d
Greasy and Scoured	13.14. 5	11.1d

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

F R U I T.

STATE	Pineapples tropical cases	Bananas tropical cases	Other Fruit cases	Tomatoes half bushel cases	TOTALS packages
Queensland	23,335	16,640	14,662 ^x	76,093	130,730
Victoria	56	204	22,212	3,726	26,198
Tasmania	-	-	33,250	-	33,250
Sth. Aust.	-	-	3,578	-	3,578
West Aust.	-	-	-	61	61
TOTALS:	23,391	16,844	73,702	79,880	192,052

Note: x Also 60 trays Strawberries.

V E G E T A B L E S.

STATE	Potatoes bags	Onions bags	Swedes bags	Pumpkins bags	Melons Crates	Cucs. & Chillies cases	Other Veggies. Pkgs. Tons	TOTALS Pkgs. Tons
Queensland	11,578	10,498	-	15,246	1,033	9,722	7,725 8 $\frac{3}{4}$	55,802 8 $\frac{3}{4}$
Victoria	5,092	7,529	-	-	-	-	772 -	13,393 -
Tasmania	4,100	-	858	-	-	-	27 -	4,985 -
Sth. Aust.	1,331	988	-	-	-	-	6,232 -	8,551 -
West Aust.	19,397	-	-	-	-	-	- -	19,397 -
TOTALS:	41,498	19,015	858	15,246	1,033	9,722	14,756 8 $\frac{3}{4}$	102,128 8 $\frac{3}{4}$

SOUTHERN AUSTRALIA

SOUTH PACIFIC OCEAN

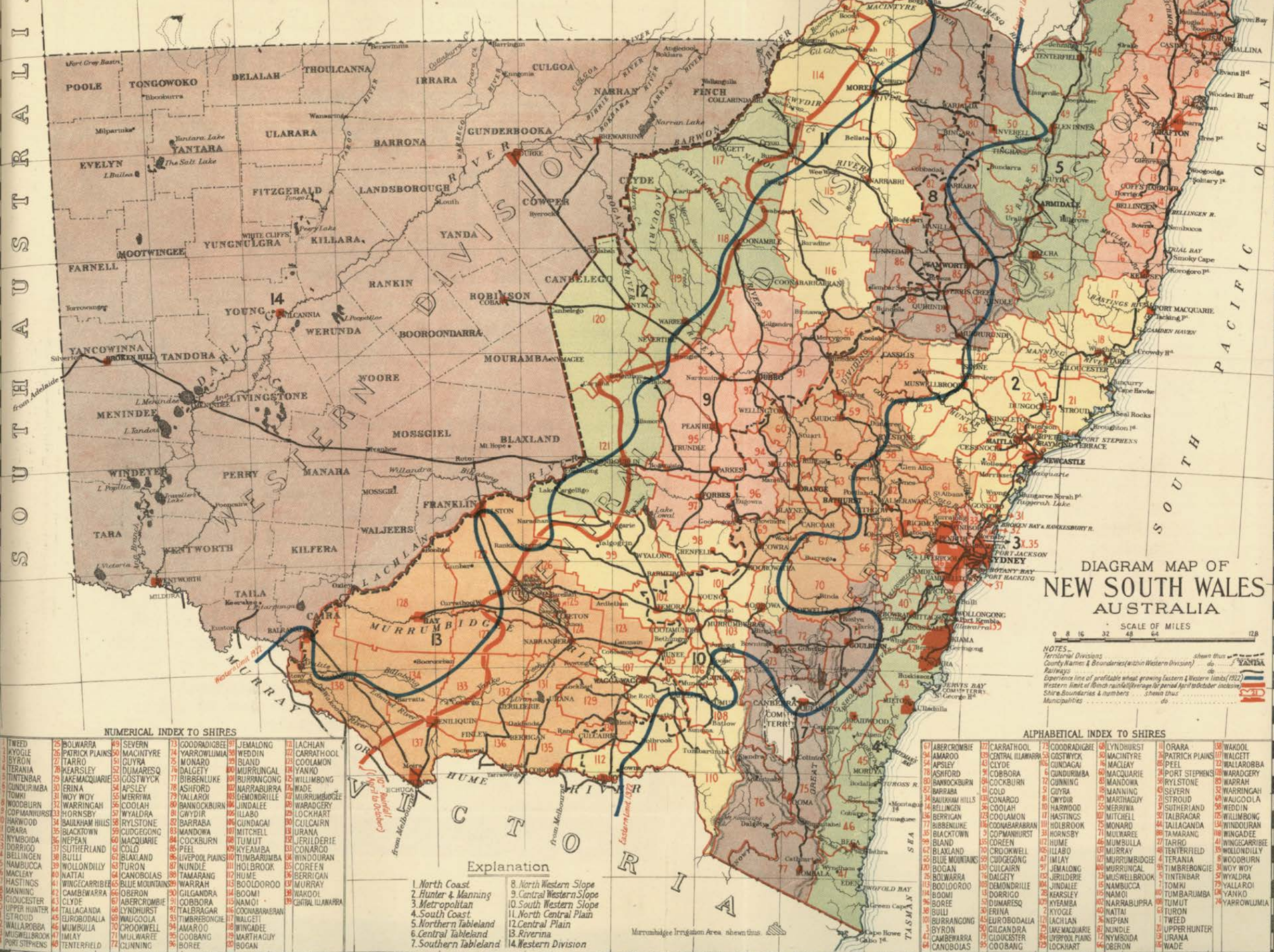


DIAGRAM MAP OF
NEW SOUTH WALES
AUSTRALIA

SCALE OF MILES
0 8 16 32 48 64 80 96 112 128

NOTES
Territories & Divisions shown thus
County Names & Boundaries (within Western Division) shown thus
Railways shown thus
Exposures of profitable wheat growing Eastern & Western limits (1922) shown thus
Western limit of 10 inch rainfall (average for period April to October inclusive) shown thus
Shire Boundaries & numbers shown thus
Municipalities shown thus

NUMERICAL INDEX TO SHIRES

1 TWEED	25 BOWWARRA	49 SEVERN	73 GOODRADIGBEE	97 JEMALONG	121 LACHLAN
2 KYOGIE	26 PATRICK PLAINS	50 MACINTYRE	74 YARROWLUMIA	98 WEDDIN	122 CARRATHOOL
3 BYRON	27 TARRO	51 GUYRA	75 MONARO	99 BLAND	123 COOLAMON
4 TERANIA	28 KEARSLEY	52 DUMARESQ	76 DALGETY	100 MURRUMUNGAL	124 YANKO
5 TINTENBAR	29 LAKE MACQUARIE	53 GOSTWYCK	77 BIBBULUKE	101 BURRANGONG	125 WILLIMBONG
6 GUNDURIMBA	30 ERINA	54 APSLEY	78 ASHFORD	102 DEMONDRILLE	126 WADE
7 TOMKI	31 WOY WOY	55 MERRIWA	79 YALLAROI	103 JINDALEE	127 MURRUMBIDGEE
8 WOODBURN	32 WARRINGAH	56 COOLAH	80 BANNOCKBURN	104 ILABO	128 LOCKHART
9 COPMANHURST	33 HORNSBY	57 WYALDRA	81 GWYDIR	105 CUNDAGAI	129 CULCAIRN
10 ORARA	34 BULKHAM HILLS	58 RYLLSTONE	82 BARRABA	106 MITCHELL	130 URAHA
11 HAWKWOOD	35 BLACKTOWN	59 CUDGONG	83 MANDOWA	107 TUMUT	131 JERILDERIE
12 RYMBODA	36 NEPEAN	60 MACQUARIE	84 COCKBURN	108 KYEAMBA	132 CONARCO
13 DORRIGO	37 SUTHERLAND	61 COOLAH	85 BELLINGHURST	109 TUMBARUMBA	133 WINDOURAN
14 BELLINGEN	38 BULLI	62 BLAKLAND	86 LIVERPOOL PLAINS	110 HOLBROOK	134 CORREAN
15 NAMBURRA	39 WOLLONDILLY	63 TURON	87 NUNDELL	111 HUME	135 BERRIGAN
16 MACLEAY	40 NATTAI	64 CANOBOLAS	88 TAMARANG	112 BOOLOO	136 WAKOOL
17 HASTINGS	41 WINGECARRIBEE	65 BLUE MOUNTAINS	89 WARRAH	113 BOOMI	137 CENTRAL LACHLAN
18 MANNING	42 CAMBARRA	66 OBERON	90 GILGANDRA	114 NAMOI	
19 GLOUCESTER	43 CLYDE	67 ABERCROMBIE	91 TALBRAGAR	115 COONABARRAN	
20 UPPER HUNTER	44 TALLAGANDA	68 LYNHURST	92 WINGEBONGIE	116 WALGETT	
21 STROUD	45 EUROBODALLA	69 WAUGOOIA	93 CROOKWELL	117 WINGADEE	
22 WALLAROBBA	46 MUMBULLA	70 CROOKWELL	94 AMAROO	118 MARTHAGUY	
23 MUSWELLBROOK	47 IMILAY	71 CROOKWELL	95 COOBANG	119 BOGAN	
24 PORT STEPHENS	48 TENTERFIELD	72 CUNNING			

- Explanation
- 1. North Coast
 - 2. Hunter & Manning
 - 3. Metropolitan
 - 4. South Coast
 - 5. Northern Tableland
 - 6. Central Tableland
 - 7. Southern Tableland
 - 8. North Western Slope
 - 9. Central Western Slope
 - 10. South Western Slope
 - 11. North Central Plain
 - 12. Central Plain
 - 13. Riverina
 - 14. Western Division

ALPHABETICAL INDEX TO SHIRES

1 ABERCROMBIE	27 CARRATHOOL	53 GOODRADIGBEE	79 LYNHURST	105 ORARA	131 WAKOOL
2 AMAROO	28 CENTRAL LACHLAN	54 MACINTYRE	80 MACLEAY	106 PATRICK PLAINS	132 WALCOTT
3 APSLEY	29 CLYDE	55 GUNDAGAI	81 MACQUARIE	107 PORT STEPHENS	133 WALLAROBBA
4 ASHFORD	30 COCKBURN	56 GUNDURIMBA	82 MANDOWA	108 RYLLSTONE	134 WARRAH
5 BANNOCKBURN	31 COCKBURN	57 GUNNING	83 MANNING	109 SEVERN	135 WARRINGAH
6 BARRABA	32 COOLAH	58 GUYRA	84 MARTHAGUY	110 STROUD	136 WAUGOOIA
7 BATHURST	33 CONARCO	59 GWYDIR	85 MERRIWA	111 SUTHERLAND	137 WEDDIN
8 BELLINGEN	34 COOLAH	60 COOLAMON	86 MITCHELL	112 TALBRAGAR	138 WILLIMBONG
9 BIBBULUKE	35 COONABARRAN	61 COONABARRAN	87 HOLBROOK	113 TALLAGANDA	139 WINDOURAN
10 BLACKTOWN	36 COPMANHURST	62 COPMANHURST	88 HORNSBY	114 TAMBORUMBA	140 WINGECARRIBEE
11 BLAND	37 CORREAN	63 CORREAN	89 HUME	115 TENTERFIELD	141 WOLLONDILLY
12 BOGAN	38 CROOKWELL	64 CUDGONG	90 IMILAY	116 TERANIA	142 WOODBURN
13 BOULWARRA	39 CUDGONG	65 CULCAIRN	91 JEMALONG	117 TIMBREGONGIE	143 WYALDRA
14 BOOMI	40 DALGETY	66 DEMONDRILLE	92 JERILDERIE	118 TINTENBAR	144 YALLAROI
15 BOREE	41 DORRIGO	67 DUMARESQ	93 KEARSLEY	119 TOMKI	145 YANKO
16 BULLI	42 EUROBODALLA	68 KYEAMBA	94 KYOGIE	120 TUMBARUMBA	146 YARROWLUMIA
17 BURRANGONG	43 GILGANDRA	69 LAKE MACQUARIE	95 LACHLAN	121 TURON	
18 BYRON	44 GLOUCESTER	70 LIVERPOOL PLAINS	96 LAKEMACQUARIE	122 TWEED	
19 CAMBARRA	45 GLOUCESTER	71 LOCKHART	97 LYNHURST	123 UPPER HUNTER	
20 CANOBOLAS	46 GOOBANG		98 NAMBURRA	124 URANA	
			99 NUNDELL	125 WADE	
			100 OBERON		