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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 FEBRUARY, 1939. No. 6

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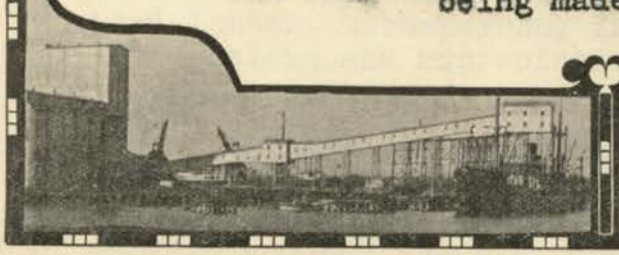

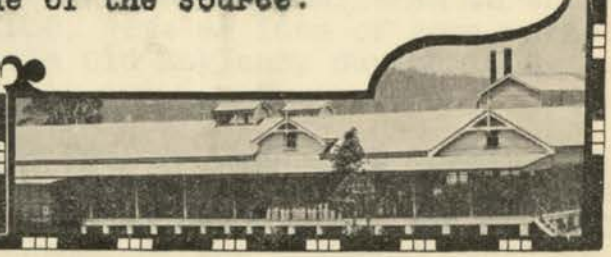

MONTHLY MARKETING REVIEW

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.

HIGHLIGHTS.

1. Heatwave results in serious scarcity of eggs in Sydney, causing sharp increase in prices and rationing of stocks.

2. New Zealand consignments of vegetables attracted to Sydney by high values consequent upon shortage due to dry conditions.

3. British Government proposes adoption of policy to link marketing of Empire and Home products by commodity councils controlling supplies.

4. According to a recent American report, an intensive campaign is under way in Japan to popularise the use of whale-meat as a substitute for beef, but the unpleasant odour of whale-meat is retarding success

5. An English newspaper describes a project for the construction of a pulp and paper mill in Canada in which certain expensive grades of paper would be produced from apple tree prunings.

SUNDRY NOTES.

(a) English News.

The following excerpts from notes published in the "Farmers' Weekly", London, December 30, 1938, give an idea of some marketing and allied problems and happenings in Old England, during 1938.

In February, 1938, the Poultry Technical Committee recommended to the Government of the U.K. formation of a permanent commission, compulsory registration of hatcheries, the regulation of markets and the granting of premiums for approved breeders. Action is promised in 1939.

/In ....

In May, potato prices in England jumped in extraordinary fashion and those who had 'potatoes in clamp' came into their own. 'Majestus' that were worth 70s. a ton fetched £6 to £7, with merchants eager to buy more.

In June, an increase of 4d a gallon in the wholesale price of liquid milk in England for July was awarded by Sir Stephen Demetriadi, the arbitrator appointed to settle the dispute between the Milk Board and the distributors over the farmers' demand for a two months' advance in prices, owing to drought costs. The Arbitrator stated he would have preferred to have given a smaller increase over a longer period.

August: in a review of the English Government's agricultural policy, the Minister for Agriculture stated: "We believe in regulated marketing for the producer of home agriculture and no more dumping of foreign produce on our shores, bringing insecurity to the home farmer."

In September, while guns rumbled through London's streets, leaders of British farming and representatives of the food trades were summoned to secret conferences in Whitehall. Arrangements were made for all food supplies to come under the direct control of the Government at a few hours' notice.

In November, the Potato Marketing Board of England was called upon to answer a storm of criticism against restriction of sales by the Board when they decided to raise the riddle and prohibit the sale of potatoes weighing more than 1 lb. The answer on behalf of the Board was that if prompt and drastic action had not been taken by the Board there was no doubt that within a few weeks potato prices would have fallen to 30s. a ton and even lower.

December saw the withdrawal of a Milk Industry Bill from the Commons in response to milk producers' objections and the granting of a temporary subsidy on Barley.

(b) General.

It is permissible to remark that there is a strong family resemblance between marketing procedures and problems the world over. 'Farming makes the whole world akin'.

In our last issue, under the heading "Domestic Marketing Regulated in Brazil", there was mention of a decision that "buying and selling, wholesale or retail, will be carried out by official auction". This decision of the Brazilian authorities is of more than passing interest.

/Cattle .....

Cattle, sheep and other stock offered for sale in public saleyards in New South Wales (in Australia, for that matter) are auctioned. Potatoes, onions and grain are commonly auctioned at the Alexandria railway terminal at which they are sold in Sydney, New South Wales. Fruit, vegetables and fish, on the other hand, offered at the City Municipal Markets in Sydney (the largest public markets of the kind in Australasia) are sold by private treaty. As an added touch of variety, table poultry sold in Sydney's Municipal Markets are auctioned.

Note that the Brazilian sales are to be carried out by 'official' auction. This may mean that the auctioneer is to be an official - a person employed by the Government, or by some municipal or other statutory body - who has no other interest in the sale than to offer the goods, call and receive bids and 'knock down' to the highest bidder in accordance with the statutory rules governing such sales. Such a system recalls the practice over many years in this State, whereby Crown Lands were offered at auction by Crown Lands Agents who are, of course, permanent officials of the State. More to the point, it recalls a verbal statement made to the writer as to selling practice at the public markets in Johannesburg, South Africa.

The practice described as occurring at Johannesburg was one under which fruits and vegetables were auctioned in the Municipal Market on behalf of either growers or their agents by Municipal Auctioneers. One is reminded, too, of a suggestion ventilated some years ago before the Potato Growers' Council of New South Wales for the adoption of parallel procedure at the Alexandria Railway Terminal, so that all potatoes sold there would be auctioned on behalf of owners or agents by auctioneers employed either by the State direct or by the Railway Department.

For many years the auctioning of fruits and vegetables by private auctioneers was a feature of the Brisbane Markets in Queensland as, indeed it still is of public markets in various parts of the world. Whether or how the system could be applied in Sydney's Fruit, Vegetable and Fish Markets, whether it would be practicable to do so and whether such a course would be expedient or desirable are interesting subjects for future Notes.

A.A.W.

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For the year ended 31st December, 1938, exports of citrus fruits from New South Wales to New Zealand aggregated 139,551 export cases, of which 139,182 were Oranges, 319 Mandarins and 50 Grapefruit. Thus, although the total was below that for 1931/32 (the year before the embargo came into force), New Zealand proved a valuable outlet for New South Wales citrus during the past year.

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PHYSICAL FEATURES, PRODUCTION, TRANSPORT FACILITIES AND MINERAL RESOURCES OF THE NORTH COAST STATISTICAL DIVISION NO. 1.
(CONCLUDED FROM LAST ISSUE).

Transport Facilities.

(a) Sea.

For a lengthy period, the only method of transport of goods from or to this Division was by sea. The New South Wales coast hereabouts is not well equipped with safe natural harbours: in these circumstances coastal trading vessels from both Sydney and Brisbane navigated the larger rivers for some distance upstream, small river boats then carrying goods further inland. The principal drawback to this was and is the presence of sand bars at the mouths of the rivers, which from time to time during rough weather, despite dredging, prevent the entrance or exit of ocean-going vessels. In the course of years quite a number of ships were wrecked on or near these bars, notwithstanding the fact that, in the last decades of last century and early in the present one, large sums were expended upon engineering works intended to make entrance to or exit from the more important of these rivers safe for shipping. Such bar or estuarine harbours are those at the mouths of the Tweed, Richmond, Clarence, Bellinger, Nambucca and Macleay Rivers. The natural anchorages provided by roadsteads at Byron Bay, Woolgoolga, Trial Bay and Coff's Harbour led to these becoming ports of call for the coastal boats; in more recent years the construction of breakwaters at Coff's Harbour has created an all-weathers port at that place. The development during this century of rail and road transport facilities has resulted in a gradual decline in the volume of cargo offering for carriage by sea, but quite a large proportion of North Coast produce is still forwarded to market by this means.

(b) Rail.

The first railway to be built in this division ran from Grafton to Murwillumbah, a distance of 147 miles. In time motor services linked this single track line with other New South Wales railway lines and with Queensland. These connecting and "feeder" motor services ran from Grafton to Kempsey, Grafton to Glen Innes, Lismore to Tenterfield and from Murwillumbah to Coolangatta, which is just over the Queensland border. The North Coast railway line from Sydney was built in sections: gradually the gaps were filled in and when the bridging of the Clarence River at Grafton was successfully achieved, the subject division of the State had complete railway connection with the great Metropolitan market of Sydney. Agitation for a connecting link between Murwillumbah and the Queensland rail head at Coolangatta failed to achieve its object. However, with a view to the strategic importance of providing unbroken railway communication between Sydney and Brisbane, an agreement was made between the Governments of the Commonwealth, New South Wales and Queensland, for the construction of a line of the standard 4 ft. 8½ in. gauge of New South Wales between Kyogle and Brisbane, the former having previously been linked with the

/main ....

main North Coast line at Casino. Prior to the consummation of this agreement, the rail route between Sydney and Brisbane had been via Northern Tableland with a break of gauge at Wallangarra on the Queensland border. The route via Kyogle being approximately 100 miles shorter, with no need for transhipment, immediately became the principal railroad between the two capitals. Of recent years, branch railway lines have been constructed in this Division between Glenreagh and Dorrigo, and between Booyong and Ballina. The total rail mileage within the Division (vide Railway Timetable) is 364.

(c) Road.

Although the necessity for some of the motor services lessened or ceased when the North Coast railway reached South Grafton, motor transport continued as an important feature of transport facilities within the Division and as linking it with Northern parts of the State west of the Dividing Range and with Queensland. Mention should be made of the regular motor services between Lismore and Brisbane, Lismore-Casino and Tenterfield and from Grafton to Glen Innes. Road transport within this Division is catered for by many excellent main roads of which the most important is the section within its borders of the Pacific Highway linking Sydney and Brisbane. There is also the first section of the Gwydir Highway from Grafton to Collarenebri via Glen Innes, Inverell and Moree. These main roads are built and maintained by the Main Roads Board of the State but the 26 Municipalities and Shires within the Division are also responsible for a network of roadways, including concrete ways within a number of the Municipalities. Total mileage of main roads only within the Division is 900, approximately.

(d) Air.

Air transport from North Coast towns, such as Lismore, to Sydney and Brisbane, is rapidly growing in popularity. Aeroplane landing facilities are available at Lismore, Grafton, Coff's Harbour, Kempsey and other centres.

Mineral Resources.

Although the North Coast Division is not very prominent in the mining industry of New South Wales, it has a number of mineral resources worthy of mention, some of which will, no doubt, be exploited to a much greater extent in the future. What are known as the Clarence coal series occupy a considerable area in the Clarence, Richmond and Tweed River districts, but at present they are only considered to be suitable for local use; for example, a small mine at Tyalgum supplies coal for the Murwillumbah Electric Power Station and for household fires. Gold mining, on a limited scale, is carried on in various centres, the more important of which are Coramba, Dalmorton and Dorrigo. In addition, gold, in a very fine state of division, occurs in accumulations of "black sand" on beaches along the coast, especially between Byron Bay and Clarence Heads. While these "black sands" have been worked

/intermittently....

intermittently in the past in search of gold, they are now more notable for the other minerals associated therein, such as tinstone, platinum, zircon, garnet, ilmenite and monazite, and at present sand from beaches near Ballina and Yamba is being treated for the recovery of zircon, rutile and ilmenite. An officer of the Mines Department (Mr. E.J. Kenny) states that ores of antimony are developed so typically in the Nambucca and Bellinger River Districts that the region may be regarded as an "Antimony Province"; the market for this metal, however, is subject to heavy fluctuations at short notice, so that output has been irregular. For the calendar year 1937, the North Coast Division accounted for 131 tons of the State's total of 144 tons of antimony.

Deposits of other minerals, etc., have been proved at various centres, although not all are being worked at present. Examples of these are:- bismuth in the Macksville area; molybdenum at Kempsey and Macksville; cinnabar at Pulganbar; diatomaceous earth (and opals) at Tintenbar and Wyrallah; manganese at Murwillumbah and asbestos at Kyogle and Yugilbar.

A.A.W. & C.K.

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A "HOME CONSUMPTION" PRICE FOR WHEAT — RESUME OF LEGISLATION —

The Commonwealth and six States of Australia, acting in co-operation and within the limits of their respective legislative powers, recently made statutory provision for a scheme for the benefit of the wheat-growing industry of Australia, the object being an improved average return to the Australian wheat-grower for the product of his labours.

The following statistics will afford insight into the position of the wheat industry of Australia and will emphasise its importance in the national economy:-

Year	Production bushels	Exports ϕWheat & Flour bushels	Value of Exports Wheat & Flour £
1932/33	213,926,981	149,865,970	21,953,822
1933/34	177,337,803	87,638,144	12,140,705
1934/35	133,393,232	109,462,298	16,219,751
1935/36	144,217,769	106,613,021	18,570,857
1936/37	151,389,952	98,887,364	24,351,714

ϕ Flour expressed in equivalent of bushels of wheat.

The annual averages for the 5-year period quoted are:-

Production bushels	Exports bushels	Value of Exports £
164,053,147	110,493,359	18,647,370

/Any.....

Any marked retrogression in such a valuable export industry is a matter of grave concern to both Federal and State Governments as well as those dependent upon wheat-growing for a livelihood. The following schedule of average prices realised by farmers at New South Wales railway sidings shows considerable variations, ranging from 1/7 to 4/8 per bushel and indicates embarrassment of the industry due to fluctuating price levels:-

Season	per bushel	Season	per bushel
1927/28	4/7	1933/34	2/2
1928/29	4/-	1934/35	2/6
1929/30	3/2	1935/36	3/1
1930/31	1/7	1936/37	4/8
1931/32	2/7	1937/38	3/8
1932/33	2/3		

Owing to the low prices ruling for wheat during the seasons 1930/31 to 1935/36, the Commonwealth Government provided financial assistance to Australian wheat-growers per medium of grants in the form of bounties and payments on an acreage basis in respect of the areas sown for grain. Portion of this sum was collected by a Commonwealth Flour Tax which operated at the rate of £4.5.0 per ton from 4th December, 1933, to 31st May, 1934, and £2.12.6 per ton from 7th January, 1935, to 24th January, 1936; the balance was made up by allocations from consolidated revenue.

During the 1932/33 season the Government of New South Wales made available the sum of £450,000 to be distributed to wheat-growers in this State in conjunction with the New South Wales share of the grant provided by the Commonwealth Government.

No monetary aid was made available in respect of the 1936/37 or 1937/38 crops as an improvement had taken place in both overseas and local prices. During 1937 the price of wheat in Sydney averaged about 5/- per bushel but by the end of August, 1938, after varying fluctuations, a steady downward trend had brought the Sydney value to 2/10½d per bushel. On 29th August, 1938, the Prime Minister of Australia and the State Premiers met in conference to consider the wheat-growing industry and as a result of the deliberations which then took place a plan was formulated for permanently assisting the industry. The underlying principle of the scheme was the payment of a "home consumption" price for wheat consumed in Australia.

At the conference referred to it was agreed that:-

(a) The States would pass legislation to fix such prices for flour sold for home consumption in Australia as would provide for wheat-growers a payable average price on all the wheat produced by them.

(b) Subject to (a) the Commonwealth Government would legislate to impose a tax upon flour sold for home consumption in Australia, the proceeds to be distributed among wheat-growers in proportion to the quantities of wheat respectively produced by them.

/The ....

The States having fulfilled their obligations, the Commonwealth Government passed six measures to permit of the scheme becoming operative, each of these being assented to on 2nd December, 1938. The Acts were:-

No. 48: Flour Tax (Wheat Industry Assistance) Assessment Act, 1938. Relating to the collection of the Flour Tax, liability of persons to taxation and submission of returns by flour millers.

No. 49: Flour Tax Act, 1938.
Authorising imposition of tax not exceeding £7.10.0 per ton on flour manufactured in Australia by any person and sold by him or used by him in the manufacture of goods other than flour.

No. 50: Flour Tax (Stocks) Act, 1938.
Empowering tax to be collected on stocks of flour exceeding one half ton held on 5th December, 1938, by other than the manufacturer.

No. 51: Flour Tax (Imports and Exports) Act, 1938.
Providing for tax on all flour and other wheat products imported into Australia on or after 5th December, 1938, for home consumption and for wheat exported from Australia on and after a date to be fixed by proclamation.

No. 52: Wheat Tax Act, 1938.
Making provision for a tax not exceeding 1/- per bushel for wheat sold in Australia to a "wheat merchant" (includes all persons, organisations, etc., in Australia to whom wheat is sold by the producer of the wheat) on and after a date to be proclaimed.

No. 53: Wheat Industry Assistance Act, 1938.
Dealing with the general administration of the scheme and the allocation of moneys collected from the flour tax among the States for distribution amongst wheat-growers, etc.

Acts Nos. 51 and 52 are intended to apply only if the price of wheat advances beyond 5/2 per bushel, f.o.r. Williamstown, Victoria, which is regarded as being equivalent to 4/8d per bushel at country sidings. Should such a position eventuate, it is proposed that Proclamations shall be issued fixing a tax upon wheat grown in Australia and sold either locally or exported. The tax is to be at the rate which bears the same proportion to the excess of the price of a bushel of wheat f.o.r. Williamstown over 5/2d as the quantity of wheat which, in the opinion of the Committee appointed under the Act, will be consumed in Australia during the twelve months following the preceding first day of October bears to the total crop which is estimated to be harvested during that period. In other words, if the price of wheat at Williamstown should rise to 5/8d and the quantity to be consumed in Australia is assessed at one-third of the crop to be harvested during the particular period, the tax would be 2d, viz., one-third of the difference between 5/2d and 5/8d.

/The .....

The amounts thus collected are to be placed to the credit of a special "Wheat Tax" account and applied as hereinafter described.

The legislation passed by the New South Wales Government which is typical of that of the other States, consists of:-

(a) Wheat Products (Prices Fixation) Act, 1938.

This Act authorises the Governor to fix by proclamation the minimum prices at which flour may be sold and the maximum prices at which flour, bran, pollard, bread and such other substances declared by proclamation to be wheat products may be sold in New South Wales or any specified part thereof by the manufacturer. In no case shall the minimum price for flour be less than £11 per ton delivered on the buyers' premises in Sydney in bags and the maximum price so delivered must not exceed £13.10.0. Provision is also made for the appointment of an Advisory Committee of three persons to assist in the administration of the Act.

(b) Wheat Industry Stabilisation Act, 1938.

This measure sets up the machinery to distribute the money granted to the State of New South Wales by the Commonwealth and prescribes the authority to undertake this work.

The method of operation of the scheme is set out below:-

(1) A Committee known as the Wheat Stabilisation Advisory Committee was appointed under the Wheat Industry Assistance Assessment Act 1938 (Commonwealth) to assist in the administration of the scheme. This Committee comprises five members, one of whom is to be a representative of the consumers. Among the functions of the Committee is the submission of recommendations to the Minister as to the rate of tax to be imposed in relation to (a) flour manufactured locally, (b) flour and other wheat products imported, (c) wheat sold locally or exported if the price exceeds 5/2d per bushel f.o.r. Williamstown.

(2) In accordance with Section 15 of the Flour Tax (Wheat Industry Assistance) Assessment Act every person by whom flour is manufactured in Australia and who during any month sells or uses flour upon which tax is chargeable must within 21 days after the close of the month furnish a return on the prescribed form to the Commissioner showing the flour so sold or used. He must also remit the amount of the tax within the time stated. The rate of tax was fixed at £5.15.0 per ton from 5th December, 1938, but this was reduced to £5.7.6 per ton from 16th December, 1938. A tax of £5.15.0 was also imposed on stocks of flour exceeding ½ ton held by other than manufacturers when the scheme came into operation, viz., 5th December, 1938.

/(3).....

(3) A Fund known as the "Wheat Industry Stabilisation Fund" has been established under Act No.53. Into this fund must be paid all moneys collected from the imposition of the flour tax. The Act also provides that there shall be kept in this Fund two accounts, viz.:-

(a) "The Wheat Industry Special Account"; and
(b) "The Wheat Tax Account".

In the first year in which moneys are collected, a sum of £500,000 is to be transferred from the general fund to the "Wheat Industry Special Account" and in each year of the period of four years next succeeding that first year such amount, not exceeding £500,000 as the Minister may determine, must also be paid into it.

All amounts collected as a tax upon wheat exported from Australia or upon wheat produced and sold in Australia must be paid into the "Wheat Tax Account". (It should be borne in mind that this tax is only payable if the price of wheat exceeds the equivalent of 5/2d per bushel f.o.r. Williamstown).

(4) The total amount paid into the Wheat Industry Stabilisation Fund after deducting therefrom the amounts transferred to the Special Account and the Wheat Tax Account, administrative expenses and specified minor payments is to be applied in making payments to the States on the basis of the proportion which the quantity of wheat produced in each State bears to the total quantity produced in Australia.

(5) In accordance with the provisions of sub-section 7 of Section 6 of Commonwealth Act No.53 the States are required to distribute the moneys paid to them by the Commonwealth among the wheat-growers of the States in proportion to the quantity of wheat sold or delivered for sale by each grower during the year in respect of which the payment is made to the States.

The amount must be paid to the grower irrespective of any prior contract under which he had assigned or transferred his right in the wheat.

(6) The £500,000 to be transferred to the Special Account during the first year is to be allocated as follows:-

New South Wales	..	£100,000
Victoria	..	£200,000
South Australia	..	£100,000
Western Australia	..	£100,000

The allotment was made by Parliament, provision having been made for the amounts stated in Section 7 of the Wheat Industry Assistance Act. The reason for setting aside this money from the first year's collections was that in 1938 drought conditions were experienced in portions of the various States, some growers recording complete failures and others negligible yields, and it was decided that they should receive assistance. The State of Victoria suffered more than the other States, hence its higher allocation.

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The States are required to distribute the sums mentioned amongst distressed wheat growers in accordance with such method of distribution as is decided upon by the Minister for Commerce, after advice from the State Ministers for Agriculture.

It is worthy of note that the New South Wales Government supplemented the Federal grant by an amount of £187,000 making the total sum available for necessitous farmers in this State £287,000.

(7) Any amount paid to a State from the Special Account in any of the next succeeding four years is to be applied to meeting the cost of transferring wheat farmers (under such conditions as are approved by the Federal Minister after advice from the State Minister for Agriculture) from lands unsuitable for the economic production of wheat or of arranging for such lands to be used for other purposes. Notwithstanding this provision the Minister is empowered to allocate the whole or portion of the sum available for affording relief to distressed wheat-growers under such method of distribution as he may determine after advice from the State.

(8) In New South Wales the authority prescribed for distributing all moneys available under the scheme is the Rural Bank of New South Wales and it will be necessary for growers to make application to that Institution on the required forms, the closing date proposed for the receipt of applications being 30th June, 1939 (in respect of the 1938/39 season).

(9) In the event of the price of wheat advancing beyond 5/2d per bushel f.o.r. Williamstown, a tax will be imposed on the basis described previously upon each bushel of wheat produced in Australia and sold either locally or exported. The money thus collected will be paid by way of financial assistance to the States in such proportions and at times as the Minister determines. Any amount so paid to a State must be distributed amongst the flour millers in that State in accordance with such method of distribution as is decided by the Minister after advice from the State. The price of flour is thus intended to be prevented from rising above a reasonable level.

(10) The scheme involves absolutely no interference with the methods of buying and selling of wheat, flour, bran and pollard or (subject to any proclamation of a minimum or maximum price for flour or maximum price of other wheat products) the method of fixation of ordinary market prices. With regard to wheat the farmer sells his available stocks when and to whom he elects and at whatever price he negotiates with miller, shipper, merchant, poultry farmer or other person. Conversely the miller, shipper, etc., buys his requirements of wheat on the open market as heretofore at market rates.

/(11) ....

(11) The miller fixes the price of flour in the usual way in relation to the fluctuations in the open market prices for wheat and adds the amount of the flour tax when selling his flour to bakers, etc., but he must observe any proclamations which may be issued from time to time fixing the minimum or maximum prices for flour (such prices, as previously stated, cannot in accordance with the Act, be less than £11.0.0 or more than £13.10.0 per ton, respectively).

The State Government has already proclaimed £12.10.0 per ton (delivered on buyers' premises) as the maximum price at which flour may be sold in certain specified areas within the City of Sydney and Metropolis.

(12) Poultry farmers are able to purchase their supplies of wheat at the ordinary market rates, while Section 14 of the Flour Tax (Wheat Industry Assistance) Assessment Act, 1938, provides that the flour tax shall not be imposed on bran or pollard "which is unsuitable for use as food for human consumption" or "flour for use as or in the manufacture of food for animals or birds".

(13) The export trade in flour is protected as flour tax is not payable in respect of flour exported or to be exported.

(14) Growers selling wheat for seed purposes are entitled to participate in payments under the scheme but wheat retained for seed would not be included in the scheme as the stipulation is "sold or delivered for sale".

(15) There is provision in the (State) Wheat Products (Prices Fixation) Act aiming at protecting the consumer against excessive prices of flour, bread and other wheat products. In this connection a proclamation was gazetted on 9th December, 1938, under the New South Wales Wheat Products (Prices Fixation) Act fixing the maximum retail price of a 2-lb. loaf of bread at 5½d over the counter in certain industrial areas in the City and Metropolitan Municipalities.

It is not possible at this stage to state what rate per bushel growers will be entitled to receive as a result of the adoption of this plan as this cannot be determined until the whole of the collections have been made for the year and the total quantity of wheat upon which payment is to be made is known. In the meantime, it is anticipated that an interim payment will be made.

Experience in the practical application of the scheme may, of course, show, as happens in many cases where accustomed practices are departed from, that modifications, alterations or additions are required but these will no doubt become apparent and the necessary remedies applied. The Governments of Australia have taken co-ordinated measures and have placed upon their respective Statute Books legislation which aims at giving a modest but necessary return to those engaged in the greatest of all Australian agricultural industries.

G.J.

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PHYSICAL FEATURES, PRODUCTION AND GENERAL DESCRIPTION OF THE HUNTER-MANNING, STATISTICAL DIVISION NO. 2.

Following on previous articles which have appeared in our October, 1937, and January, 1939, issues, relating to physical features and primary production of the various divisions of the State, it is now proposed to deal with the Hunter-Manning, or Statistical Division Number 2.

Statistical particulars of area and population.

Including a considerable proportion of the more fertile land of New South Wales, the Hunter-Manning, according to statistics published in the New South Wales Year Book, comprises 29 local governing areas consisting of 15 Shires and 14 Municipalities, and has a total area of 8,395,562 acres (equal to 13,118 square miles). Holdings of 1 acre and upward aggregate 4,990,003 acres, of which 4,102,304 acres are lands alienated or virtually alienated, and the balance Crown Lands. During 1936/37 119,000 acres were under crop and 452,000 acres sown with grasses. At the last census, taken in 1933, this division had a population of 302,012, whilst the figures for the principal towns were:- Newcastle and Suburbs 104,485, Cessnock 14,385, Maitland (East and West) 12,329, Taree 4,581, Singleton 3,668, and Muswellbrook 3,287. On a population basis, the Hunter-Manning ranks next to the Metropolitan (or Cumberland) Division. To a large extent, this is due to the rich coal deposits in the vicinity of Newcastle, Cessnock and Maitland, which materially assisted the rapid growth of manufacturing industries at Newcastle between the years 1911 and 1933. In that period the population of this city (inclusive of its suburbs) increased from 54,603 to 104,485.

Widest of the Coastal Divisions.

The Great Dividing Range takes a decided westerly bend where it skirts the headwaters and surrounds the valley of the Hunter River and tributaries. It thus allows a much greater width of coastal belt here than elsewhere, the maximum being over 150 miles. The dividing range in this particular part is of lesser average height than the ranges further north and south and is not of sufficient altitude to have any great influence on weather and rainfall. The greater distance of much of this Division from the sea, however, is a contributing factor towards a lower annual average rainfall than occurs in the North Coast Division; nevertheless, the range of from 22 inches per annum at Denman to 60 inches at Port Macquarie may be regarded as very satisfactory. The mean temperatures of both winter and summer are slightly lower than those for the North Coast.

Rivers and Streams.

Like the rest of the coastal strip, the country is traversed by numerous rivers and sizeable streams which are subject to periodical floodings. In their upper courses these rivers and streams flow

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through broken, mountainous and heavily timbered country, while in the lower basins undulating and, at times, extensive and very rich alluvial flats exist, where lucerne, maize and similar crops can be cultivated with the prospect of heavy and high quality yields.

Of the rivers referred to, the most important is the Hunter, winding its way to the sea for a distance of 287 miles. At Singleton it has a drainage area of 6,580 square miles and an average annual run-off of 627,610 acre feet. Next in importance are the Hastings and Manning, both over 100 miles in length, while the foremost of the smaller streams are the Camden Haven and Wollomba. The famous Hawkesbury forms portion of the southern boundary but, so far as Division Number 2 is concerned, it is comparatively unimportant.

Extensive Coast Line.

The coast line of the Division takes in that strip from Point Pioneer, slightly north of Port Macquarie (where the Hastings enters the sea) and bearing south-west for approximately 170 miles to Broken Bay, into which the Hawkesbury flows. Spacious inlets and several lakes or lagoons are to be found at intervals. The estuary at the Hunter River has been converted into a serviceable harbour for the rapidly growing centre of Newcastle, while Port Stephens, as yet undeveloped, possesses a magnificent expanse of land-locked water, great stretches of which exceed 30 feet in depth. In point of situation, too, this latter harbour is well qualified to constitute a commercial outlet of the future for not only the Hunter-Manning, but a great part of Northern New South Wales. Broken Bay, previously referred to, also provides good anchorages.

Picturesque Lakes.

The lakes in this Division are all coastal and do not differ greatly in character from their prototypes occurring along other parts of the Coast. They are partly marine and partly estuarine. It is said that they were formerly coastal valleys at higher levels than they occupy at present, and that they were "drowned" by the sea when the subsidence occurred which formed the existing harbours and present coastal levels. Their entrances are in most cases shallow and are often blocked by the action of sea and wind upon the sand. Lake Macquarie, only 8 miles south of Newcastle, is the largest, having an area of some 44 square miles. A chain of very beautiful lakes, of which the principal are the Myall and Wallis, lies further north, while the popular Tuggerah Lake is situated toward the southern extremity of the division's coast line. The picturesque scenery of the surrounding country, together with the extensive fishing and oyster grounds, has made these lakes a mecca of tourists and holiday makers from many parts of the Commonwealth.

Varied primary pursuits.

As may well be imagined, such a favoured area as the Hunter-Manning is particularly well suited to agricultural and pastoral pursuits, varied in nature and wide in scope. Projects

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as far apart in character as citrus growing and cattle raising are actively and progressively carried on and, in their respective areas, are equally successful. Furthermore, standards of quality of the majority of products are unusually high.

Maize and Lucerne of special importance.

Maize and lucerne are perhaps the most important crops, the former being grown for grain and fodder, and the latter for hay and fodder purposes. A big proportion of the maize is produced in the vicinity of the Hastings and Manning Rivers, with further tracts on the Patrick Plains, near Singleton, in the vicinity of the Hunter River. On the Manning, broom millet and lucerne, in addition to maize, are cultivated extensively under a system of mixed farming, with dairying on a larger or smaller scale as a basis. Further south, on the Hunter River, maize-growing and dairying give way largely to lucerne, broom millet, pumpkins, melons, potatoes and onions, which are produced on land that ranks amongst the richest on the Coast of New South Wales.

Production of both maize and lucerne is from year to year generally heavy and, whilst the maize harvest is much less than that of the North Coast Division No.1, it forms a big proportion of the State's aggregate. In 1936/37, with over 30,000 acres devoted to maize, a yield of 621,933 bushels was obtained, representing approximately one-fifth of the total for New South Wales. The area sown to and the production of lucerne have for a long period been important features of rural life of the Hunter-Manning. Land set aside for this valuable fodder in 1936/37 exceeded 32,000 acres, about equal quantities being planted for green feed and harvested for hay. For the year quoted the yield of hay is given at 38,936 tons contributing, as in the case of maize, a big share of the State's total.

New green and slightly matured lucerne hay arriving from the Hunter-Manning are important and sought-after supplies in the Sydney markets. Time and again consignments from this area have relieved shortages. Drought conditions accentuate the normal request, since much of the mature hay from tableland districts is then diverted to the west and, in these circumstances, Sydney buyers rely largely on Hunter River growers.

Other fodder crops.

Only comparatively small quantities of oats are cultivated and these mainly for green feed. Other fairly important fodder crops are millet, rape and sorghum, though much of the area sown to millet is devoted to fibre and grain production. Wheat for grain and hay is also to be found in moderate quantities, holdings in districts around Muswellbrook and on the Upper Hunter being prominent in this respect, but when compared to the yields from the far greater extent of wheat growing lands of inland Divisions, production is practically negligible.

/Dairying ....

Dairying a flourishing industry.

Naturally enough in this area, as in other parts of the Coastal divisions, the dairying industry flourishes. The advantage of proximity to big centres of population serving as outlets for fluid milk as well as butter and cheese, is an added stimulus to the industry. The City of Sydney draws extensively on factories in central and southern portions of the Division, such as those located at Singleton, Dungog, Branxton, Bowthorne, Wyong and Hexham, for its daily milk supply. The proportion of fluid milk supplied does not remain constant, being dependent on many factors, not the least important being seasonable conditions, but for the season 1937/38 this division supplied 6,810,421 gallons, equal to over 25% of the 26,544,530 gallons received by the Sydney Milk Board. For the same year, approximately 1¾ million gallons of milk were delivered from factories to the Milk Board in Newcastle, while direct sales by suburban dairymen in the Newcastle area were estimated to total 1½ million gallons. Butter production, of course, is extensive, figures from 1927/28 to 1936/37 disclosing that an approximate average of 25,000,000 lbs., or nearly one-quarter of the State's total, came annually from the 17 factories of the Hunter-Manning division. The output of cheese is appreciable, being in the vicinity of 1,250,000 lbs. annually for the ten years to 1936/37, representing close to one-fifth of the cheese manufactured in New South Wales. Subsidiary activities connected with dairying, such as the breeding of pigs, also receive a good deal of attention, as indicated by an examination of figures relating to Bacon and Ham for the ten-year period mentioned above; the output was never lower than 1,204,470 lbs. and in one particular year exceeded 3,000,000 lbs.

Fat Stock Raising.

Not all of the cattle, however, are raised for dairying, quite large areas being devoted almost exclusively to beef production. To a lesser degree, also, sheep for both wool and mutton are found on holdings considered to be suited for this purpose. The reserves of fodder in the nature of maize and lucerne play their part in the development of high quality stock and, as a fattening area, the Hunter-Manning is most certainly near to the ideal, for, apart from carrying capacity, proximity to Sydney and Newcastle makes it especially attractive. As to the capabilities of the division, it is a noteworthy fact that were it not for supplies from graziers in such districts as Dungog, Gloucester and Paterson, the numbers of suitable beef cattle arriving at Homebush Saleyards (Sydney) during the recent drought would at times have been reduced to a mere handful. In periods of drought the importance of safe districts like these cannot be over-estimated. Another feature of the division which contributes in no small measure to the soundness of the live stock industry is the existence of a modern Abattoir at Newcastle (owned and conducted on behalf of various Municipalities by the Newcastle District Abattoir Board and to vest in and belong to the Council of the City of Greater Newcastle from April, 1939) which was described in an article published in the February, 1938, issue of this Review.

(To be continued)

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SHEEP AND CATTLE SALES AT HOMEBUSH, SYDNEY.

Sheep and Lambs in short supply.

A notable feature of the month's operations at the Homebush Saleyards was the sudden falling-off in supplies of both mutton and lamb. Despite the fact that the first sale held during January saw 63,803 head yarded, which was the heaviest penning for about 4 years, the aggregate of sheep and lambs forward for the month was only 295,256 head or approximately 21,500 less than the number available during December. Looking back to the month of January, 1938, we find that consignments of sheep and lambs arriving at Homebush Saleyards were considerably heavier, totalling 352,742 head or 57,486 more than reached the market during the period under review.

Much needed rain somewhat relieves acute pastoral position.

Although general rains were not received in New South Wales, some measure of relief was afforded in a number of centres by fairly substantial falls which replenished diminishing water supplies and gave parched and burnt up pastures much needed relief. Although still far from satisfactory, the position is better than for some time past.

Prime Mutton and Lamb scarce.

That there is a scarcity of good to prime mutton and lamb throughout the sheep raising areas of the State is evidenced by the light supplies of quality stock reaching the Homebush Saleyards. It cannot be overlooked, however, that when lots showing finish came to hand, they were very attractive; this was the case with several lines of prime sheep and lambs offered during the month. For the most part, however, the yardings included large numbers which could only be classed as fair to medium, while many of the sheep and lambs auctioned were extremely plain and showed the effects of the dry season experienced.

Wide disparity in numbers penned.

One thing was particularly noticeable and that was the irregularity of supplies. The opening sale was marked by a heavy yarding of 63,803 and then on the next sale day the total dropped to 36,583 head, whilst subsequent pennings numbered 45,847, 28,497, 35,134, 26,743 and 58,649. Such widely divergent yardings are difficult to follow and reflect on prices to create a somewhat unstable position in the industry.

Fluctuating values for wethers and ewes.

As a result of the large number of sheep available during the opening sale, when supplies far exceeded buyers' requirements, competition was dull and inactive. Operators were faced with the necessity of holding a big proportion of the sheep over the week-end and made due allowance for this factor when assessing values. A sharp

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decline in prices resulted, the fall ranging from 2/- to 4/- per head. There was little change in the market for the two following sales, but from then on values showed an upward movement so that the fall experienced early in the month was practically recovered. At the final sale held during January prices again declined sharply from 1/- to 3/- per head. This irregularity of the market is a reflex of the supplies on demand, and indicates only too well how prices are affected by the sudden rise or fall of the number of sheep submitted for sale.

There were some very satisfactory prices obtained, up to 24/- for wethers and 18/- per head for ewes being paid on several occasions. Generally speaking, however, realisations ranged from 12/- to 16/- for good wethers and 10/- to 14/- for ewes, with fair to medium sorts at relatively lower levels. Rates per pound for mutton were on the average higher than those ruling during December of last year but, although fewer sheep were marketed, lower than those obtained in January, 1938. The highest price paid on the hoof during January, 1939, was 3¾d per lb. for wethers and 3½d per lb. for ewes but rates were chiefly in the vicinity of 2¾d to 3¼d for wethers and 2d to 3d for ewes. Plain and inferior sheep were disposed of at relatively lower values.

Medium to plain sheep in better demand.

A highlight of the month's operations was the improved demand for medium to plain sheep. This was occasioned by the scarcity of good trade mutton forcing operators to secure their requirements from the medium to plain grades with a resultant improvement in prices; on one occasion values for this class of wether and ewes advanced by from 1/- to 2/- per head.

Lamb market mostly steady.

The demand for lambs and hoggets was much steadier throughout than was the case with sheep, due chiefly to somewhat restricted numbers. Although the month's operations opened with a fall of up to 1/- per head for fair to plain lambs, subsequent sales showed a recovery, while values for good to prime grades also advanced by from 1/- to 2/- per head. This strong position of the lamb market was not fully sustained over the closing stages, rates declining by about 1/- per head. Some of the best prices paid for lambs ranged to 22/- per head but from 16/- to 20/- were the most consistent values. Choice quality suckers made 6¾d per lb. on the hoof but these were only few in number. The greater part of the best quality lambs and suckers made 5½d to 6¼d per lb. according to weight. There was also a fairly consistent demand for hoggets and up to 4¾d per lb. was realised; mostly, however, this class of meat was disposed of at from 3¾d to 4¼d per lb.

Better prices probable in near future.

Although it is not possible to forecast the future in regard to rainfall, it is thought that, with the sheep flocks so

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much reduced through drought and heavy sellings by the graziers, should beneficial rains be experienced in the country, owners will be enabled to hold their sheep for fattening and the next wool clip, so that there will be a scarcity of both mutton and lamb at Homebush, with resulting high prices.

Heavy yardings of Cattle.

Large numbers of cattle continued to come forward for sale at Homebush. There were only seven selling days during January; nevertheless, aggregate yardings (28,297 head) exceeded the December total by more than 1,500, although cattle were sold on eight days during the latter month. Only a few head, comparatively speaking, came to hand from Queensland owners. Of the January total of 28,297, the relatively small number of 2,806 was disposed of in the store section.

Plain types predominate.

Generally the proportion of good to prime quality cattle was small, large numbers of plainer types being available on each sale day. Notwithstanding this fact, operators were usually able to fulfil their requirements in respect of cattle suitable for the local trade. Under existing conditions it does not appear as if greater numbers of fats can be expected at Homebush. Some improvement in pastoral conditions can possibly be looked for in a number of districts following the rains of late January but, on the whole, the outlook is not very bright for other than medium quality cattle.

Bullocks and steers principally of light to medium weight.

Bullocks and steers of light to medium weight were fairly plentiful and mostly of fair to good trade standard. A feature, however, was the scarcity of good quality lots of weighty bullocks, usually odd beasts only of this description being available. When offered they were the subject of keen inquiry from buyers specialising in this class of cattle. Many of the bullocks and steers sold were of mixed breeds, straight lines of Durhams, Herefords or Black Polls being rarer. Some typical sales during the month were: Good quality Shorthorn bullocks weighing 775 lb. dressed weight sold at £13.5.0 per head, equivalent to 34/- per 100 lb.; Shorthorn bullocks weighing 650 lb. made £11.14.0 per head or 35/- per 100 lb. A draft of prime Hereford and Hereford-Durham cross steers brought £10.17.0 per head or 38/- per 100 lb. of beef on the hoof.

Cows and heifers plentiful.

Cows and heifers, generally speaking, were plentiful but large numbers of somewhat plain and inferior descriptions were included. However, a fairly large percentage comprised fair to good quality trade lines, while occasional beasts of prime grade were to be seen. At a number of sales prime heavy cows sold particularly well, no doubt due to the general scarcity of weighty bullocks,

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and as high as £12.0.0 per head was recorded at times. The bulk of the supply in this section consisted of mixed breeds of dairy strain. An outstanding line of cows offered on one sale day and which surpassed any seen for some time, was 36 Herefords of medium weights, ranging from 575 lb. to 620 lb.; they brought up to £9.13.0 per head, making 29/- to 30/- per 100 lb.

Keen request for prime vealers and yearlings.

Increased numbers of vealers and yearlings were yarded and, although the general standard was medium, some good to prime lots of good breeding were to be seen, and these were usually keenly sought after.

Values generally show downward trend.

The heavy yardings had an adverse effect on values, the market showing a steady downward trend throughout the month. This was more noticeable in respect of cattle lacking quality. Heavy grades sold fairly well, while prime descriptions of all classes were not effected to such a great extent. At the sale held on the 19th January, reports of rain in some pastoral centres were responsible for a temporary recovery in prices but this was not maintained. At most of the auctions held during the month it was noticeable that competition during the afternoon was inclined to become dull and the market developed weakness and irregularity.

G.C. & S.R.

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Auction Sales of New Potatoes on the North Coast Steamship Company's wharves, Darling Harbour, Sydney. 1938/39 Season.

A feature of the 1938/39 potato marketing season in Sydney, which commenced last October, is the introduction of auction selling as the general medium for the disposal of Northern Rivers potatoes on the wharves at Darling Harbour. In previous seasons, sales by auction had been held in only a few instances, as agents in general preferred to decide on a market rate and to arrange sales by private treaty. Auction selling, however, has proved remarkably successful over a number of years at the Alexandria Railway Goods Yard and has two main points to recommend it. Firstly, as growers invariably receive higher prices for better samples, they are encouraged to raise their grading standard to as high a level as possible. Secondly, it often occurs that less time is required for the agent to effect the sale. The difficulties in past years at Darling Harbour, however, were to congregate all buyers on the one wharf at a set time and to ensure that all agents would favour the auction. These obstacles were overcome at the commencement of this season, and notices were issued by the agents concerned that all lines would be auctioned upon arrival of the shipment. Results surpassed expectations and all parties benefited from the introduction. There is every likelihood that the same method will be favoured for the early 1939/40 crop next October, whilst, in the meantime, the system of sale by auction continues to operate with customary smoothness at the Alexandria Railway Goods Yard.

T.McK.

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

Higher rates for Potatoes.

Inquiry for potatoes at both selling centres was very firm throughout January and stocks of all varieties were disposed of rapidly. As was the case last month, a proportion of the consignments from local sources had to be reconditioned before being submitted to auction.

In Sussex Street, the total quantity of potatoes available comprised 76,640 bags from Tasmania, representing a heavy increase over the December supply, and 7,250 bags from Western Australia. During the first week of January Tasmanian Brownells were quoted at £15.10.0 and Bismarcks at £15 per ton. The market rates for the next week increased to £18 and £17, respectively, later declining to £15 and £14 per ton. Subsequently, however, owing to the excellent demand in evidence, agents were obliged to fix the prices at £20 for Brownells and £19.10.0 per ton for Bismarcks. Similar fluctuations were experienced for the Western Australian Delaware variety which realised from £14 to £17 per ton. The shipments of Western Australian tubers are becoming very light, as the season for this variety is drawing to a close.

The 6,663 bags of new potatoes from New South Wales centres consigned to Alexandria met with a good request. The auction sales were attended by a large number of representative buyers, who participated keenly in the bidding and supplies quickly passed from first hands at the following rates:- New Grade £9.10.0 to £18.5.0, No.2 Grade £6.0.0 to £15.6.8, Chats £8.0.0 to £10.10.0 per ton and 4/- to 15/3 per bag.

A noticeable feature about the stocks submitted during January was the decrease in receivals of new potatoes and the increased arrivals of Brownells, indicating the close of the season for the "new" and the commencement of that for "old" potatoes.

Receivals of Onions from New Zealand.

Owing to the excellent demand evident for onions and the light stocks available from Australian sources, New Zealand growers consigned 2,200 bags of brown onions to Sussex Street during the month. The quality of the shipment was reported to be fairly satisfactory and sales were recorded at from £25 to £28 per ton.

A total of 7,069 bags and 119 tons of onions were received in Sussex Street from South Australia and Victoria.
The rates paid for these offerings were higher than those obtained for some years past. The market was excellent and ready disposals were effected at the following levels:- Victorian Brown £25 to £32, White £20 to £30, Picklers £10 to £16, and South Australian Whites £25 to £28 per ton.

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The arrivals at Alexandria comprised 429 bags from South Australia, 320 bags from Victoria and 128 bags from New South Wales centres. A similar demand to that ruling in Sussex Street was apparent and sales were made at £27 to £30 per ton for Victorian Brown, £28 for Brown and £26 to £28 for White onions from South Australia, and £26.1.8 to £30 for New South Wales Brown.

Pumpkins in good request.

The market for pumpkins during January was at all times good, although early in the month rates were lower than those ruling in December. The 13,240 bags of Queensland pumpkins shipped to Sussex Street were in good request and, although early realisations were £7.10.0 to £11 per ton, closing values were £18.

At Alexandria, receivals totalled 27 trucks from Queensland and 1 from local growers. The truck of local produce arrived early in the month and sold at £7 per ton, whilst the Queensland consignments met with good demand and ranged in price from £7.10.0 to £18 per ton.

Increased offerings of Swede Turnips from Tasmania.

Tasmanian swedes were more heavily supplied than in December but the 2,402 bags available cleared very quickly at £10 to £22 per ton.

The first consignment of Tasmanian carrots for this season came to hand during January; the 172 bags on offer were disposed of at £25 per ton.

Request for Tasmanian peas was again strong. Stocks were only light and were insufficient to fulfil buyers' requirements. Rates for Blue Peas ranged from 9/- to 12/- whilst prices for the Grey variety were from 9/- to 11/- per bushel.

Limited request for white chaff.

Although a smaller yarding of oaten chaff, 222 trucks, was available at Alexandria, rates declined still further. The market was similar to that ruling during December and difficulty was experienced in disposing of stocks, even at prices lower than those quoted that month. Vendors stated that the carry-over on the ground was fairly substantial and medium quality lines were very hard to clear. Sales were effected at the following levels:- Medium £4.5.0 to £5.0.0, Good £5.5.0 to £6.0.0 and Choice and Extra Choice £6.5.0 to £6.10.0 per ton.

Demand for the 48 trucks of wheaten chaff at rail was quiet. Offerings were in excess of buyers' needs and only good to prime chaff was in request. A few extra special lines were submitted early in the month, realising from £5.10.0 to £6.0.0 per ton, but the major portion of the supply was of medium to good grade and moved out slowly at from £4 to £5 according to quality.

/Slight .....

Slight decline in rates for lucerne chaff.

The 108 trucks of lucerne chaff railed to Alexandria during the month were slightly in excess of the quantity received during December. Disposals of all qualities were made at about 5/- below the rates ruling last month, but very fair clearances were reported at £4.15.0 to £5.15.0 per ton for medium, £6.0.0 to £6.15.0 for good and £7.0.0 to £7.10.0 for prime Green lucerne chaff.

Satisfactory market for lucerne hay.

The market for lucerne hay at Alexandria and Sussex Street this month was quite satisfactory and steady deliveries took place throughout. At Alexandria stocks on offer comprised 58 trucks from Maitland and 113 trucks from other centres. Maitland hay sold steadily at the following prices:- New Green £5.10.0 to £7.5.0, Dry Green £5.15.0 to £7.0.0 per ton. Inquiry for the mature variety consigned from other districts centred principally around prime dry Green, which realised from £7.10.0 to £8.0.0, whilst other descriptions passed from vendors' hands at values ranging from £4.0.0 to £7.5.0 per ton, according to quality. Growers from the Hunter River district consigned 332 bales of New and Dry Hay by sea to Sussex Street; these stocks sold steadily at £5.10.0 to £6.10.0 for New and £6.0.0 to £6.15.0 per ton for Dry Hay.

Prices for Victorian Oaten hay unaltered.

A slightly larger shipment of Victorian special oaten hay, 100 bales, was available in Sussex Street at the unchanged rate of £11 per ton. Only a portion of the 51 trucks of the oaten hay consigned by New South Wales growers to Alexandria was offered to buyers. The market was over-supplied and towards the close of the period this commodity was practically unsaleable. During the month some sales were reported at from £5.5.0 to £8.10.0 per ton.

Heavier arrivals of local straw.

Although smaller shipments of straw, totalling 5,030 bales, were received from Tasmania, this was more than offset by heavier arrivals at Alexandria where 38 trucks from New South Wales districts came to hand. Consequently, request was somewhat restricted and disposals were quiet at the following rates:- Local (at Alexandria) £3.10.0 to £4.0.0, prime to £4.10.0; Tasmanian (in Sussex Street) £4.15.0 to £5.0.0 per ton.

Improved inquiry for wheat.

The demand for the lighter arrivals of wheat at Alexandria, aggregating 55 trucks, showed a slight improvement but prices were lower. Sales were effected by both auction and private treaty at from 1/10½d for inferior to 2/8d per bushel for F.A.Q. wheat.

/Limited....

Limited request for maize and oats.

Stocks of maize available at Alexandria were made up of 2,140 bags of local and 513 bags of Queensland origin, the total being considerably above that for December. Demand was slow at 5/- to 5/6 for local and 4/8½d to 4/11d per bushel for Queensland Yellow maize. The 1,564 bags of South Coast and 79 of North Coast maize shipped to Sussex Street sold quietly, the low rates ruling for wheat having an adverse effect on the request for maize. Stocks were only partially cleared at the following rates:- Large Grain 5/- to 5/2d, Small Grain 5/2d to 5/3d per bushel.

Portion of the 27 trucks of oats at rail was offered at auction, realisations reported ranging from 2/7d to 3/1d per bushel.

E.A.G.

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TRADING IN FRUIT AND VEGETABLES AT THE CITY MUNICIPAL MARKETS.

Quality affected by adverse weather.

The excessive heat and extremely dry conditions which prevailed during early January seriously affected the quality of both fruit and vegetables in most districts. Extensive damage was reported from many areas as the result of bush fires and the record high temperatures experienced on Saturday, 14th January.

New season apples on offer.

Small quantities of apples of the 1938 crop, chiefly Democrats and Yates from Tasmania and Victoria, respectively, were available during the early part of the month and prices up to 20/- per case were recorded for the best quality descriptions. Later, consignments of new season varieties such as Gravenstein and McIntosh Red were submitted from both New South Wales and Queensland centres. These apples were mostly small and lacking in colour and were not easy to dispose of but larger sized coloured lines cleared well at very satisfactory rates. Granny Smiths from the Irrigation Area and other early districts were also on offer and sold freely as cookers. A comparison of prices ruling during the month under review with those recorded for the same period in 1938 shows those for the current season to be much higher, although the fruit was of smaller size and generally lower quality.

The general trend of the market throughout the month was downward and with supplies becoming progressively more plentiful, small fruit became increasingly difficult to dispose of.

Choice pears in demand.

Williams pears were forwarded in moderately large quantities from Victoria, and later in the month were available from New South Wales districts, also. A good demand for choice

/lots ....

lots was experienced throughout and values were fairly regular but with a weaker tendency noticeable towards the end.

Supplies of Valencia oranges varied from light to fairly heavy and prices fluctuated accordingly, but only within a small margin so that, on the whole, values were well maintained.

Peaches heavily stocked towards end of month.

There was a good request for the light to moderate stocks of peaches available up to about the third week of January and prices were relatively high. Towards the end of the month, however, large quantities, principally Elbertas, were received from the Irrigation Area to supplement local supplies and moderately heavy consignments from Victoria. This resulted in a rapid fall in quotations. As stocks could not be cleared quickly enough, vendors were obliged to avail themselves of cool storage facilities to avoid losses. During this period of plentiful supplies demand centred principally around choice local Shanghais which sold readily, but at reduced rates.

Nectarines from both coastal and inland districts were also on offer but the bulk consisted of small fruit, which was somewhat difficult to dispose of. Choice large fruit, however, was always in request at very satisfactory prices. Supplies of plums varied from moderate to fairly heavy. Large descriptions of quality cleared well but small fruit was difficult to sell. Angelina Burdett, Wickson and Narrabeen were the most popular varieties.

Cured lemons in request but green fruit neglected.

There was little inquiry for other than choice coloured (preferably cured) lemons early in the period under review, but towards the middle of the month only comparatively small quantities were available and clearances were readily effected at advanced rates, odd sales being recorded to 24/- per case. These high prices induced growers to market large quantities of green immature fruit which proved to be practically unsaleable. Other lines were showing the effects of the excessive heat and continued dry weather and were almost devoid of juice. This had a depressing effect on the market generally and resulted in a considerable fall in rates.

Increased supplies of passion-fruit.

Values of choice passion-fruit showed a steady upward trend until the end of the third week when realisations were recorded to 12/- per half-case. With greatly increased supplies available, however, rates, within the space of a few days, dropped to former levels.

Improved prices for bananas.

Supplies of bananas were for the most part of moderate dimensions and consisted of a greater percentage of the larger sized fruit. There was a good demand for choice lines and, while fluctuations occurred, values mostly were higher. Odd sales of

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special quality fruit were effected at as high as 28/- but generally the market ranged from 14/- to 24/- per tropical case, according to size and quality.

Pineapple market fluctuates.

Pineapples were plentiful during the first two weeks of the month and were the most reasonably priced fruit obtainable. Later, owing to a falling-off in supply, values showed a steady upward trend, up to 18/- per tropical case being recorded for the best quality descriptions. By the end of the month, however, increased consignments came forward and prices receded to former levels.

Satisfactory realisations for grapes.

Grapes were available throughout the month, first from Queensland and later from New South Wales districts, and very satisfactory prices were realised, particularly for Black Muscatels.

Water Melons smaller than usual.

Fairly plentiful supplies of water-melons were forward but owing to the hot dry weather conditions which prevailed during the growing period, were much smaller in size than usual. Prices recorded, therefore, may not at first appear to compare favourably with those obtained in former years, but, in actual fact, values were relatively high.

Rock Melons well supplied.

Ample stocks of Rock Melons were received from both the Irrigation Area and local sources. Prices were not high, the general range being from 6/- to 9/- per tropical case but were fairly evenly maintained throughout the period.

Green Vegetables scarce.

Owing to the exceptionally hot dry weather and the shortage of water in many areas, all kinds of vegetables, particularly greens, were scarce. This was most noticeable after the record high temperatures which prevailed on Saturday, 14th January.

High prices for peas and beans.

Usually during a time of scarcity in New South Wales considerable quantities of peas and beans are forthcoming from Victoria but as the unfavourable conditions prevailed in both States, consignments from the South were limited. Apart from the scarcity of supplies, the quality of the bulk of both the peas and beans on offer left much to be desired. Nevertheless, stocks mostly were cleared readily and; while variations occurred, high prices were realised, up to 22/- and 24/- per bushel, respectively, being recorded. The fluctuations in prices which took place from time to time were due to the fact that the high rates ruling

/periodically.....

periodically retarded sales to such an extent that vendors were obliged to accept lower values to facilitate clearances.

Prices of cabbages relatively high.

There was a remarkably good demand for the moderate supplies of cabbages available throughout the period. When the prices obtained during the month just past are compared with those quoted for the same period last year it is revealed that they are much higher and, when it is taken into consideration that the cabbages this season were generally much smaller and of vastly inferior quality, it will be seen that the rates this year have been extremely high. Cabbages which in a normal season would have been ploughed in or fed to stock were brought to market and sold at prices which would ordinarily have been good values for choice quality "heads".

Record Rates for spinach.

Spinach was in short supply and cleared readily at exceptionally high prices. Some sales were effected for as much as 10/- per dozen bunches, which is said to constitute a record. Most other kinds of bunched vegetables, particularly beetroot and carrots, were also rather scarce and brought satisfactory rates.

Lettuce, which is always a good selling line in hot weather, met a strong request throughout the period and values of choice lots were well maintained. The bulk of the offerings was of only poor to medium quality but supplies cleared well.

Steady demand for choice tomatoes.

Although consignments of tomatoes were received from Victoria and Queensland to supplement local supplies, stocks were, for the most part, moderate. There was a steady demand for choice quality descriptions with buyers showing a preference for firm coloured locals. Early in the month prices tended to ease, particularly during the cool change which followed the heat wave but later the market recovered and closing quotations were from 1/- to 2/- per half-case higher than the rates ruling at the beginning of the period.

E.J.C.

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The "Fruit, Flower and Vegetable Trades' Journal" (London) of 3rd December, 1938, contains interesting particulars concerning the voluntary scheme for potato grading, to be adopted by the Potato Marketing Board, Great Britain, as from 1st January, 1939. This scheme provides for three standards which must be in strict accord with the conditions under which producers entering the scheme will agree to grade, viz., Standard (yellow label), Select (table) (green label) and Select (chipping) (orange label). Distinctive bag labels to indicate that the standards have been adopted will be supplied to producers by the Board gratis.

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WHOLESALE PRICES OF VARIOUS COMMODITIES IN SYDNEY (N.S.W.) DURING JANUARY, 1939.

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 January, 1939:-

Commodity	From	To	
Wheat:-			
Bulk - old	2/3d	2/3¾d	per bushel.
" - new	2/5d	2/6d	" "
Bagged - new	2/5¾d	2/6½d	" "
Flour	£12.5.0	£12.10.0 (including £5.7.6 tax)	per ton.
Bran	£5.0.0	£5.5.0	per ton.
Pollard	£5.0.0	£5.10.0	" "
Eggs (Hen)	1/4d	2/-	per dozen.
Butter:-			
Choice 161/2d per cwt.			
First Quality 156/6d " "	No variation.		
Second Quality 151/10d " "			
Cheese:-			
Loaf 11d per lb.			
Large 10½d " "	No variation.		
Special Brands	1/1d	1/2d	per lb.
Pigs (Abattoir Sales):-			
Prime light porkers	29/6d	44/6d	per head
" med.wgt. "	36/6d	50/6d	" "
" heavy "	43/6d	54/6d	" "
" baconers	56/6d	76/6d	" "
Backfatters	£5.0.0	£10.0.0	" "

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SYDNEY WOOL SALES - JANUARY, 1939.

The Sydney Wool Selling Brokers' Association advises that 87,802 bales of wool, including 84,451 greasy and 3,351 scoured, were sold in Sydney during the month of January, 1939.

The average prices realised were as follow:-

Class of Wool	Per Bale	Per lb.
Greasy	£13. 5. 7	10.7d
Scoured	£17. 0. 7	17.4d
Greasy and Scoured	£13. 8. 5	10.9d

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

F R U I T.

STATE	Pineapples tropical cases	Bananas tropical cases	Other Fruit cases	Tomatoes half bushel cases	TOTALS packages
Queensland	16,622	10,956	24,339	1,971	53,888
Victoria	23	242	18,206	5,079	23,550
Tasmania	-	-	16,980	-	16,980
Sth. Aust.	-	-	3,591	-	3,591
West Aust.	-	-	-	-	-
TOTALS:	16,645	11,198	63,116	7,050	98,009

V E G E T A B L E S.

STATE	Potatoes Bags	Onions Bags	Swedes Bags	Pumpkins Bags	Pumpkins Tons	Melons Crates	Cucs. & Chillies Cases	Other Vegs. Pkgs.	Other Vegs. Tons	TOTALS Pkgs.	TOTALS Tons
Queensland	2,227	6,361	-	22,495	8¼	1,866	79	3,315	13¼	36,343	21½
Victoria	4,094	13,021	-	10	-	-	-	963	-	18,088	-
Tasmania	21,128	-	664	-	-	-	-	148	-	21,940	-
Sth. Aust.	584	1,703	-	-	-	-	-	1,991	-	4,278	-
West Aust.	17,956	-	-	-	-	-	-	-	-	17,956	-
TOTALS:	45,989	21,085	664	22,505	8¼	1,866	79	6,417	13¼	98,605	21½

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

L.39-1

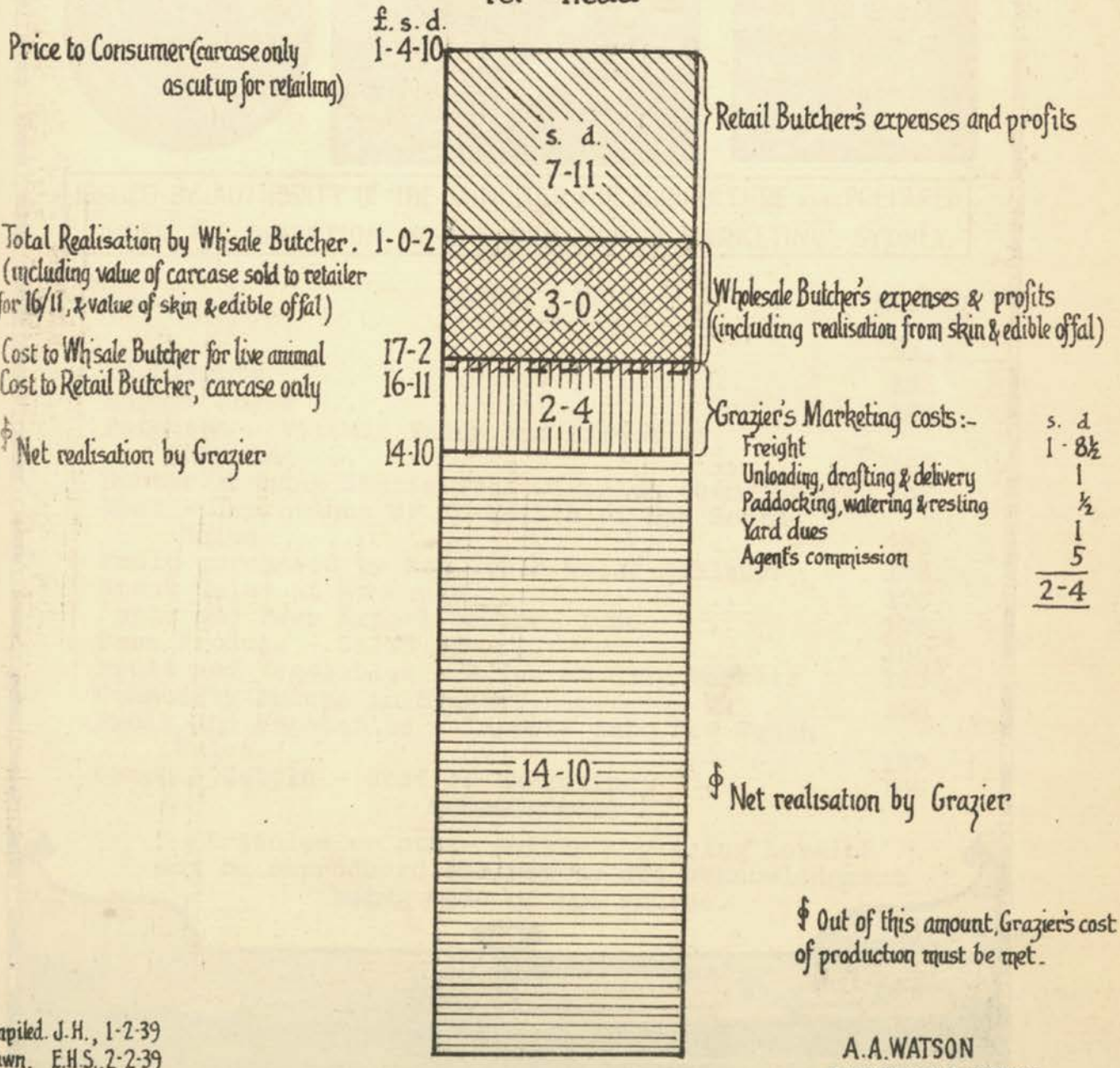
LAMB (Good Trade)

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

JANUARY 1939

39-151

Per Head



$ Out of this amount, Grazier's cost of production must be met.

Compiled. J.H., 1-2-39
Drawn. E.H.S., 2-2-39
Checked. C.K., 2-2-39

A.A. WATSON
DIRECTOR OF MARKETING.

Basis of graph: Lamb 30 lb. dressed weight sold on hoof at 17s-2d.