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

# MONTHLY MARKETING

## REVIEW



ISSUED BY AUTHORITY OF THE MINISTER FOR AGRICULTURE AND PREPARED  
UNDER THE DIRECTION OF THE DIRECTOR OF MARKETING, SYDNEY.

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## MONTHLY MARKETING REVIEW

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A miscellany of matters relating to the marketing of primary products, at home and abroad.

Released during the second week of each month.  
Issued by authority of the Minister for Agriculture and prepared under the direction of the Director of Marketing in the State Marketing Bureau, Department of Agriculture, New South Wales, Australia.

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### THE VEGETABLE GROWING INDUSTRY OF NEW SOUTH WALES - INDUSTRY ORGANISATION AND MARKETING PROBLEMS -

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(Address by Director of Marketing, Mr. A.A. Watson, to the Seventeenth Annual Conference of the Agricultural Bureau of New South Wales.)

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#### Introduction.

It is said that the favourite prayer of the average Scotsman is "Lord, gie us a guid conceit o' oorsels". Such a prayer on behalf of the vegetable industry of New South Wales might well be uttered. Here is an industry, producing that which is indispensable in the diet of the people, essential to their health and consumed daily in a vast majority of homes, that is quiescent, even apathetic in its collective approach to the public. That is not as should be. Every wool-grower is conscious of the outstanding economic importance of his industry to Australia. Every wheat-grower is 'out and about' and well informed as to the great part of his industry in the development and commercial life of the country. The dairy-farmer is equally to the fore, and very rightly so, in insistence upon due recognition of the importance of his industry to the nation's welfare. And so with the fruit-grower, whose right to a place in the economic sun of Australia is bravely won and gallantly held. But not so with the vegetable industry.

One reads of "mute, inglorious Miltons" who sleep in village churchyards, and it would almost appear that the vegetable industry of New South Wales is content to shine fitfully in obscure markets and, for the rest, to dedicate itself to economic vagueness and humility. I say 'almost' advisedly, remembering where lamps of organisation shine brightly. Wide-spread inertia notwithstanding, here and there are individual growers, or groups of growers, who realise that common interests demand representative attention and act accordingly.

#### Sydney Market Gardeners' Association.

A word or two about these bright exceptions will not be amiss 'right now', though I must be brief. First let me allude to the Sydney Market Gardeners' Association, comprising a majority of  
/the .....



the Australian growers within and about the Metropolitan Area and a few round Parramatta and Windsor. This body has had uninterrupted existence for about 40 years. It has functioned mainly in relation to the City Council and its officers with reference to selling spaces for its members in the City Vegetable Market, though many other matters have engaged its attention from time to time. Chinese growers are not members of this body, but Chinese market gardeners are now comparatively few and their virtual disappearance as a material factor in vegetable production seems inevitable.

### Foreign-born Growers.

Here may I interpolate brief mention of the fact that in recent years a substantial number of Italian, Maltese and other foreign-born Europeans have established themselves in the industry near Sydney. These people, by and large, are competent growers, but few among them are to be found in any growers' organisation (apart from such as may exist among themselves and of which I have no knowledge). Time, no doubt, will equip these people with improved knowledge of our language and better general understanding of our policies: then should come inclination to fuse or coalesce with the industry as a whole.

It is most undesirable, I suggest, that primary producers should be sectionalised on a racial basis. Our primary industries are geographically and inescapably Australian and those engaged in them who are not of our race should have all encouragement and be expected to become nationally and industrially Australian.

It seems likely that the vegetable industry, as one that can be conducted on the relatively small areas to which they were accustomed in Europe, is destined to see further additions to its ranks from foreign-born European immigrants. Recently, a Dutch gentleman representing the Netherlands Emigration Foundation informed me of a tentative project to place a number of Dutchmen in the metropolitan vegetable industry of this, the greatest of the Australian States. I learned with infinite pleasure that if Dutch immigrants come here they will do so intending to avoid any semblance of racial grouping. It called to my mind meeting "Pennsylvanian Dutch" people in the United States. They are 100% American.

Two vital needs will have been met if and when, in addition to swelling our population and bringing new cultural elements to our land, all immigrant growers become merged with our Australian growers in essential organisation of the vegetable industry. That they should stand aside from or, worse still, hamper the development of organisation that will benefit them equally with their Australian confreres is unthinkable. Of course, we must be patient with them, remembering they bring precious increase of population, but such patience may fairly go hand-in-hand with a policy aimed at their understanding and acceptance within reasonable time of the privileges and responsibilities of industry-wide organisation for marketing and allied purposes. In this connection, however, it behoves many Australian vegetable-growers themselves to remember that an ounce of example may be worth a ton of precept.

/Industry .....



## Industry Organisation.

In addition to the Sydney Market Gardeners' Association, organisations of vegetable-growers affiliated with the Vegetable Growers' Association of New South Wales are to be found at Valla (North Coast), Glenorie, Kurrajong, Leeton, Wilde's Meadow (Moss Vale), Preston's via Liverpool, and Moorebank. The Vegetable Growers' Association acts for all vegetables other than potatoes. The interests of potato-growers, as such, are taken care of by the Potato-growers' Council of New South Wales, a body made possible by the Primary Producers' Union, the Agricultural Bureau, the Farmers' and Settlers' Association and the Sydney Market Gardeners' Association, each of which includes potato-growers in its membership as well, of course, as other types of growers. Both the Vegetable Growers' Association and the Potato-growers' Council are doing notable work in their respective spheres. These are the lamps that burn brightly amid the encircling inertia, not to say the indifference of so many growers.

And now for one or two other matters, although I hope that nothing I shall say will serve to distract attention from the all-important subject of organisation. One could wish that wherever vegetable-growers gather together, the dominating topic would be industry welfare through industry organisation. In days of old there were war-cries to inspire warriors; today we have slogans to inspire movements. I suggest that "Industry welfare through industry organisation" is both opportune and appropriate for the vegetable industry of New South Wales.

## Fruit and Vegetable Chain Stores.

Recently, there has been talk of fruit and vegetable chain stores in Sydney. My interest in such proposals derives from two sources. Firstly, as Director of Marketing, I am required to be equally as interested in retail as in wholesale distribution. Secondly, it happens that during recent months I have been in a position to devote increasing attention to retail facilities and methods. I might add a third and a fourth reason. The third is my intention that study of retail problems shall be a considerable feature of the research work of the State Marketing Bureau and the fourth my belief that the primary producer, with whose marketing interests I am chiefly concerned, is tremendously affected by the presence, or absence, of economy and efficiency in connection with the retail stage of selling farm products.

Whether or not chain stores originated in the United States of America, it is in that country they have attained their greatest vogue and magnitude and there, so far as I know, we find the best examples of chain stores devoted to the retailing of fruit and vegetables. I am not to be tempted into a discussion of the merits or demerits of chain stores. The facts are sufficiently arresting and I leave you to draw your own deductions. Here are some particulars of the position in U.S.A. They are taken from an official publication of the United States Department of Agriculture,

/issued .....



issued from Washington, D.C., as recently as February of last year, following investigation by William C. Crow, Associate Agricultural Economist, Bureau of Agricultural Economics. Mr. Crow points out that the term "chain store" is restricted in its use by him to mean corporate chains only and hence does not include voluntary chains. I am indebted for my copy of the publication to Dr. A.G. Black, Chief of Bureau, whom I had the privilege of meeting when visiting Washington in October, 1935.

#### Scale of operations of Fruit and Vegetable Chain Stores.

Mr. Crow's brochure deals with 40 cities in the United States. It would take too long to quote the information he gives with regard to the fruit and vegetable chain store system as it operates in each of those cities, though I should greatly like to do so. The cities themselves are a representative selection ranging from Jacksonville, Florida, with a population of 135,000, to Los Angeles (1,238,000), Detroit (1,568,000), Philadelphia (1,951,000), Chicago (3,376,000) and New York itself with its teeming population of 6,930,000. In these 40 American cities, 158 chain fruit and vegetable store systems operated between them no less than 18,174 shops, or an average of 115 shops per chain store organisation. In Jacksonville, Florida, there were 6 chain store systems operating 50, 30, 24, 9, 8 and 4 shops, respectively, or a total for all of 125 shops. In Atlanta, Georgia (population 270,400), 3 chain-store systems operated 132, 99 and 32 shops respectively, or 263 shops between them. In Baltimore, Maryland (population 804,900) 3 chain store systems, 210, 175 and 75 shops respectively, totalling 460 shops. Boston, Massachusetts (population 781,200) had 3 chain store systems with 1,000, 600 and 400 shops respectively, or 2,000 in all. Los Angeles (population 1,238,000) had 4 chain-store systems with 236, 17, 9 and 8 shops, or a total of 270. Detroit (1,568,000) 4 systems of 550, 415, 370 and 10 shops respectively. Philadelphia (1,951,000) 4 systems operating 827, 383, 6 and 4 shops or a total of 1,220. Washington, District of Columbia, the capital of U.S.A., with a population of 486,900, had 3 chain-store systems operating 331, 250 and 50 shops respectively, making a total of 631 shops. Chicago, Illinois (3,376,000) had 5 systems operating 828, 735, 224, 98 and 5 shops respectively, or a total of 1,890, while New York (6,930,000) had 11 chain-store systems operating 1,400, 683, 650, 638, 550, 125, 35, 15 and three with 4 shops each, making a grand total of 4,108 chain-store fruit and vegetable shops in the New World's greatest city.

#### More as to the magnitude of Fruit and Vegetable Chain Store operations.

I have already mentioned that the 40 cities covered by the survey are the venue for 158 chain fruit and vegetable store systems controlling 18,174 shops. You will naturally want to know - What percentage of the total receipts of fruit and vegetables in those cities is handled by the chain stores? The answer, provided in Mr. Crow's excellent report, is 23.1%, or near enough to one-fourth.

/The .....



The sheer immensity of this business is almost unbelievable. The combined population of the 40 cities in question is 28,403,300 (vide a 1935 Atlas in my possession); so that 158 chain store systems, operating 18,174 shops, supply over 28,000,000 people with nearly one-fourth of their fruit and vegetable requirements. It sounds incredible: organisation of wholesale trade on such a scale would be remarkable, but this is organisation of retail trade, essentially a more difficult thing. The whole business is set forth in quite matter-of-fact style by Mr. Crow, suggesting that it ceased long since to be a novelty in America. The fact remains that, as described and as indicated by him, it stands as a veritable triumph of retail trading enterprise.

What results could be expected if Fruit and Vegetable Chain Stores became established in Sydney?

Corporate chain stores for the retailing of groceries, drapery, hardware, general merchandise, confectionery, pharmaceutical supplies and the like are well known in Australia. So far as I know, however, the chain store system has not yet been established in Australia on a basis of specialisation in the retailing of fruit and vegetables. I am informed that three such chain store organisations are to be found at Liverpool in England, from which I deduce they probably exist in other English cities.

Obviously, the fruit and vegetable chain store system in the United States has not put all other retailers of fruit and vegetables out of business, though it is reasonable to suppose they must have caused considerable displacement. Clearly, they rate as large individual wholesale buyers, many of them, no doubt, as the largest in their respective cities and some of them, it may be, as the greatest in North America concerned with the retail trade. The significance and possibilities of such big-scale buying will not be lost upon growers. The effect it could have in Sydney upon the existing facilities for and methods of wholesaling fruit and vegetables is a very interesting subject for speculation. Would buyers of the stature associated with chain store systems be content to function through existing intermediaries, or would they look for opportunities for direct buying? Would they, in time, be the means of deflecting an appreciable proportion of the supplies which now enter the City Municipal Markets and so appreciably reduce handling costs and, at the same time, the importance of those markets? I do not suggest, or even surmise, that the effect would be prejudicial, or otherwise, either to producers or consumers. Considerable adjustment and realignment of existing wholesale marketing might come to be involved and repercussions in relation to the existing retail trade would doubtless be seen in immediate and progressive and far-reaching changes. Conceivably, the successful advent of fruit and vegetable chain store systems in Sydney could be comparable, as to the scope of the changes it would cause, with the arrival of 'talkies' in the moving picture world. Again I say, I express no opinion as to the merits or demerits of fruit and vegetable chain stores. The most I can or should say is to point out that there are archaic, out-of-date features associated with existing procedure and that the law of change, to which all human interests are subject, will inevitably overtake Sydney's methods of wholesaling and retailing fruits and vegetables.

/Existing ....



Existing facilities for retail distribution of Fruit and Vegetables in Sydney.

At intervals of about three years, it is my practice, as Director of Marketing, to seek the co-operation of the Suburban Municipal and Shire Councils within the Metropolitan Area of Sydney in the compilation of a return showing the numbers of shops, stands, markets and stalls therein devoted to the sale of fruit and vegetables. The last occasion on which this was done was in 1937. The returns made were tabulated in September of that year. It was disclosed that fruit and vegetable shops and stands in the Metropolitan Area of Sydney (exclusive of the City proper) numbered 1,384. Of that number a very large preponderance, probably 90%, was shops. In future, a similar return will be sought from the City Council, though the main purpose of the return will continue to be the discovery of the facilities available in the suburbs where, of course, the great bulk of retail purchasing of fruits and vegetables occurs.

Conclusion.

Here I will conclude: it had been my intention to say something of the possibilities that may lie ahead of the canning of vegetables and vegetable juices in this country and of the high<sup>ly</sup> promising developments of quick-freezing in relation to vegetables, but the injunction laid upon me to leave as much time as possible for discussion is one with which I entirely agree and to which I gladly conform. Just one word, then, in closing and perhaps I may make this in my capacity of President of the Vegetable Growers' Association of New South Wales. Vegetable-growers! You have a great and essential industry in your hands, how great, far too many of you don't realise. Pray for 'a guid conceit' of yourselves and be assured that producers have nothing to fear from combinations of wholesalers or retailers, or both, provided they match organisation with organisation. It seems that your period of 'laissez faire' is passing rapidly and that circumstances may shortly compel what precept and enabling statutes can never command.

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AUSTRALIAN BARLEY CROP - 1939/40 SEASON.

The Commonwealth Government has announced that it will acquire the 1939/40 barley crop. The price for number one malting barley will be 4/3 a bushel ex rail Spencer Street or ex wharf Melbourne, while the rates for other grades will be fixed by the Australian Barley Board.

In the event of shipping difficulties preventing the usual export trade (it is estimated that the exportable surplus will be 6 million bushels) a special endeavour will be made to stimulate local sales for stock fodder purposes.

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PHYSICAL FEATURES, PRODUCTION AND GENERAL DESCRIPTION  
OF THE NORTHERN TABLELAND, STATISTICAL DIVISION NO. 5,  
NEW SOUTH WALES.

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In recent issues of the Monthly Marketing Review articles have appeared dealing with the various Coastal Divisions of New South Wales. It is now proposed to give similar descriptions of the Tableland Divisions, viz., Northern, Central and Southern, in that order.

General Description of Tablelands.

The Tablelands form the Great Dividing Range, which traverses the State from north to south and marks the division between the coastal districts and the slopes. They comprise an extensive plateau region, divided near the centre by what is known as the Cassilis or Hunter Gap; the Northern Tableland is situated north of this gap, while the Central and Southern are to the south. Generally the descent on the eastern side is steep, while on the west the slope is more gradual. The Tablelands vary in width from 30 to 100 miles. At various levels gently undulating upland plains occur throughout these Divisions.

The Northern Tableland.

The Northern Tableland, or Statistical Division No. 5, comprises principally the highlands known as the New England Range, and extends from the Queensland border to the northern side of the Peel River Valley, a distance of approximately 200 miles. Its average height is 2,500 feet, but a considerable area is at a greater altitude than 4,000 feet, and the highest point, Ben Lomond, is 5,000 feet above sea level.

As might be expected from the altitude, the climate mostly is characterised by temperate summers and cool winters, and a consistent rainfall ranging from 29 inches in the western parts to 40 inches in the eastern. The temperature is described as cool and bracing, the annual average being between 56° and 60°, the mean summer temperature between 66° and 72° and the mean winter between 44° and 47°. The New England districts are favoured as summer health resorts by residents both of the more humid coastal areas and of the hotter inland regions.

The whole Division is generally well watered, although the rivers are of minor size and are notable only as tributaries or headwaters of the larger coastal and inland streams. The eastern watershed gives rise to coastal rivers such as the Clarence and Macleay, whilst the western sees the commencement of the Dumaresq, Macintyre and Gwydir, all flowing inland to join the Barwon.

Area and Population.

The New South Wales Statistical Register shows that the Northern Tableland Division comprises 7 Shires and 6 Municipalities, and has a total area of 8,068,560 acres (approximately 12,607 square /miles) .....



miles). At 30th June, 1938, there were 3,697 holdings of 1 acre or upwards with an aggregate acreage of 6,531,627, of which 4,341,475 acres were alienated or virtually alienated lands and the remainder unalienated Crown Lands. 100,678 acres were under crop, while 31,889 acres were sown with grasses.

At 31st December, 1937, the population of the subject Division was 55,440 and that of the principal towns was:- Armidale 7,100, Glen Innes 5,450, Inverell 5,900 and Tenterfield 2,720.

#### Noted for fine wools.

The foregoing statistics show that only a limited area of the Division is cropped. The major portion of the holdings is utilised for pastoral pursuits, especially sheep for wool and cattle for beef purposes, of which wool-growing is probably the most important.

The Tableland Divisions are the most elevated parts of New South Wales, so that the climate is colder than elsewhere, while the rainfall is higher than further inland. The climatic condition and natural pastures are more favourable to the grazing of sheep, particularly wethers, for wool growing, than to the depasturing of breeding ewes. The Tablelands, however, are particularly suitable to the production of fine wools, and may be said to be the home of the fine-woolled small framed merino, producing many of the fine and super-fine wools raised in New South Wales. The wool, in addition to being fine, is reasonably clean, bright and free. While merinos predominate, a number of flocks of British breeds are to be seen.

In recent years, considerable areas have been improved by means of top-dressing of native grasslands and by the laying down of pastures, making them more profitable for sheep and, in places, causing a change over from wethers to breeding ewes. A certain amount of attention has been given to the raising of fat lambs in some of the more favoured centres, especially in the Central and Southern Tableland Divisions. Owing to the sparsity of rain during the winter and the severity of the climate during these months, as well as the distance from market, the fat lamb industry is unlikely to expand to any great extent in the Northern section.

As at 31st March, 1937, there were 3,361,260 sheep in the Northern Tableland division, almost half of which were in flocks of between 1,000 and 5,000 head; these were mostly grazed on the central and western portions.

#### Cattle raising and Dairying.

The eastern sections of this Division are more suitable to cattle than to sheep, and here most of the 222,613 "other cattle" (principally beef breeds) at 31st March, 1938, were depastured,

/although .....



although numbers of them were to be found also in the rougher parts of the western slopes.

Dairying is carried out to a limited extent, principally on mixed farms, the number of cows in registered dairies being 22,491. These dairies are mostly situated in the vicinity of the towns, having the supply of fresh milk as the primary object. However, a number of butter factories are located in the division, chiefly in the northern parts, the production from these in 1937/38 amounting to 1,767,444 lb. The factories are up-to-date and the expansion of dairying in this area has been a noteworthy feature of the more recent development of this industry. Pig-raising, usually in conjunction with dairying, is conducted on a small scale, the pigs in the Division totalling 7,744 and bacon and ham production for 1937/38 aggregating 301,623 lb.

#### Maize.

While the subject Division is mainly pastoral, west of Glen Innes, around Inverell and about Tenterfield there are extensive tracts suitable for cultivation. The country to the south and east of Glen Innes has been described as mountainous with ridges and fairly level areas that may be utilised for agricultural purposes, this being specially so about Glen Innes, Red Range, Glencoe, Stonehenge and Ben Lomond.

Owing to its summer rainfall, the Northern Tableland is suited to the cultivation of maize and, although they are not large, the yields obtained are profitable and dependable. On account of a lower moisture content, tableland maize is less subject to weevil depredations than is the coastal grain. A considerable expansion of the area cultivated has occurred during recent years, and the opinion has been expressed that the New England districts probably offer better possibilities for the further development of this industry than do any other parts of the State, as conditions there are not only favourable but suitable land is much more reasonably priced than it is in coastal areas. At the same time, the New South Wales market for this commodity is limited, so that a rapid increase in the future cultivation of this crop is not anticipated.

According to the New South Wales Statistical Register, 25,298 acres for grain and 1,429 acres for green fodder were sown with maize in the Northern Tableland Division in 1937/38, Glen Innes and surrounding district being foremost, followed by Tenterfield. The yield of grain totalled 522,009 bushels.

#### Other Cereals.

The growing of wheat for grain is practically confined to the Inverell portion of the Division, and in 1937/38 only amounted to 16,230 acres, yielding 251,628 bushels; 1,996 acres of this cereal were grown for hay. Climatic conditions are more favourable for the cultivation of oats, of which 7,063 acres were sown for grain and yielded 136,218 bushels, 20,886 acres were planted for hay and 7,375 acres for green fodder purposes, Guyra, Glen Innes and Armidale districts predominating. Lucerne, for hay and green fodder, was grown on 6,736 acres, of which approximately



one half was situated in the Inverell sector. Only very limited areas of other cereal and fodder crops were cultivated.

### Potatoes and other Root Crops.

The Northern Tableland is an important potato growing Division, producing approximately one quarter of the State's total yield, and centres such as Guyra, Black Mountain, Llangothlin and Red Range are well and favourably known for the quality of the tubers forwarded to both New South Wales and Queensland markets. In 1937/38, acreage planted totalled 5,112 from which 10,920 tons of potatoes were dug.

### Fruit Growing.

While the Division is suited climatically to the cultivation of various English fruits, production on a commercial scale is principally confined to the Uralla and Kentucky districts, with small areas of orchards in the Tenterfield and Glen Innes portions. A considerable proportion of the fruit therefrom is marketed in northern New South Wales centres or in Brisbane, Queensland. The Statistical Register shows that in 1937/38 there were 2,261 acres of productive trees and 1,043 acres of young trees not yet bearing, and that the chief fruits harvested consisted of 147,113 bushels Apples, 29,719 bushels Pears and 8,449 bushels Cherries.

### Vegetables.

The subject Division generally does not figure very prominently in the vegetable-growing industry of New South Wales. However, almost one quarter of the area devoted to turnips is within its borders, whilst peas from certain centres such as Ben Lomond and Guyra are welcome supplements to the supplies arriving on the Sydney market during the summer months. In all, 2,980 acres of vegetables were cultivated during 1937/38, including 1,289 acres of peas, 1,117 acres of turnips and 284 acres of pumpkins and melons.

### Forestry.

In common with other parts of the State, the more accessible forests of the Northern Tableland have been extensively exploited, but valuable areas are still to be found. Pine, cedar, rosewood, silky oak and coachwood are the most common of the softwoods, while blackwood, tallow, woollybutt, grey and red gum, peppermint and stringybark are the more important hardwoods. The report of the Forestry Commission reveals that in 1936/37 the estimated gross consumption of timber in the Glen Innes Forestry District comprised:-

Hardwood	..	9,487,139	superficial feet
Hoop Pine	..	2,987,086	" "
Cypress Pine		2,453,726	" "
Exotics	..	5,000	" "
Brushwood	..	1,428,626	" "
Fuel	..	20,453,384	" "
Total:-	..	<u>36,814,961</u>	" "

/Important ....



### Important Tin-Mining Districts.

The Northern Tableland ranks second only to the Western Division (containing the famous Broken Hill mines) in importance in respect to metalliferous mining, and in 1937/38 the 111 mines working had an output valued at £235,005. Tin is the principal mineral won, and occurs chiefly as Tinstone, which was first discovered soon after 1851 near Dundee and Paradise Creek; active tin-mining in New South Wales is said to have commenced in 1871, the first workings being on Newstead Station, near Elsmore, between Glen Innes and Inverell.

While tin is very widely distributed in New South Wales, it is in the northern portion of the State (and mostly within the boundaries of the Northern Tableland) that the principal deposits occur. According to the report of the Mines Department, the largest output of tin during 1937 was from the Tingha district, but quantities were obtained also at Deepwater, Glen Innes, Inverell, Tenterfield, Emmaville, Torrington and Wilson's Downfall; dredging was responsible for a considerable proportion of the output. Deposits of other minerals, etc., have been proved and worked to varying extents at numerous centres, some of the more notable of these being gold at Hillgrove and Drake; molybdenum at Deepwater, Bolivia and Glen Innes; wolfram at Emmaville, Deepwater, Glen Innes and Torrington; scheelite and antimony at Hillgrove; bismuth at Glen Innes, Deepwater, Bolivia and Torrington; lead-silver-zinc at Emmaville; manganese at Armidale, Deepwater, Uralla and Walcha; copper at Drake, silica at Tenterfield; fluorspar at Deepwater; arsenic at the Mole River, near Torrington, and at Tent Hill.

### Rail and Road Communications.

The Northern Tableland is connected with the metropolis of Sydney by the main northern railway line, which passes through Walcha, Uralla, Armidale, Guyra, Glen Innes and Tenterfield to Wallangarra, just over the Queensland border, where the Queensland line to Brisbane meets it. For many years, this northern line was the route by which the Sydney-Brisbane rail traffic was carried, but this recently has been superseded as the inter-capital route by the more direct North Coast line passing through Kyogle and Killarney.

Inverell, on the western edge of the subject Division, is the terminus of a branch from the north-western network. For some time now the residents of North-Western, Northern Tableland and North Coast districts have urged that rail communication between the inland areas and coastal ports should be provided by the continuation of a railway linking Inverell with Glen Innes and thence with Grafton. An alternative but less comprehensive scheme, which had been approved and commenced when the depression caused its abandonment, was to build a line from Guyra, on the northern line, to Dorrigo, the terminus of a branch of the north coast system.

In the absence of connecting lines between the practically parallel north coast and northern systems, direct passenger traffic

/between .....



between the main North Coast and Northern Tableland towns has been catered for by a number of motor services, such as the Port Macquarie-Walcha, Kempsey-Armidale, Grafton-Glen Innes, and Lismore-Casino to Tenterfield, whilst a "feeder" service to the inland districts runs from Glen Innes to Inverell.

The main roads of the Northern Tableland principally cater for motor traffic from the south to the north and from east to west (or vice-versa), the chief highways passing through it being the New England, which follows the same route as the northern railway, and is the alternate road link between Sydney and Brisbane; the Oxley, running from Port Macquarie via Walcha en route to Trangie; the Gwydir, from Grafton via Glen Innes and Inverell on to Collarenebri. In addition to the main roads and highways, maintained by the Main Roads Board of New South Wales, there are numerous other roads provided by the Municipalities and Shires.

#### Schedules of Production and Livestock.

The following schedules compiled from figures published in the New South Wales Statistical Register, give the average annual quantities of the principal primary products produced and the average annual number of livestock in the Northern Tableland Division for the five-year period ended 30th June, 1938:-

#### Northern Tableland Division - Average Annual Production Five Years ended 30.6.1938.

Wool	25,398,271	lb.
Oaten Hay	20,835	tons
Lucerne Hay	3,211	"
Maize (Grain)	398,276	bushels
Wheat (Grain)	135,222	"
Dairy Products:-		
Butter	2,030,466	lb.
Bacon & Hams	428,884	"
Apples	152,050	bushels
Pears	35,661	"
Cherries	7,575	"
Potatoes	12,622	tons
Turnips	1,219	"
Pumpkins & Melons	553	"
Peas (Value)	£8,361	

Applying the 1938 annual average wholesale prices in Sydney to the foregoing products, a suggested estimate of their approximate value, together with the value of timber produced and minerals won in this division, is £2,250,000

/Average ....



Average Annual Number of Livestock in Northern Tableland  
Division - Five Years ended 30.6.1938.

			<u>Head</u>
Horses	..	..	25,207
Cattle	- Cows in registered dairies	..	25,771
"	- All other	..	228,887
Sheep	..	..	3,189,347
Pigs	..	..	8,327

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C.K.

NEW SOUTH WALES GOVERNMENT RAILWAYS  
RATES FOR THE CARRIAGE BY PASSENGER TRAIN OF  
FRUIT (FRESH) AND VEGETABLES (GREEN)

Under the New South Wales Government Railways By-Law No. 945, effective from 1st October, 1939, the rates for the carriage by passenger train of Fruit (Fresh) and Vegetables (Green) are specified as:-

- (1) When cheaper than Half Stamped Parcels (Prepaid) Rates on the bulk weight, the rates for fruit (fresh), asparagus, beans (green), brussels sprouts, cabbages, cauliflowers, celery, cucumbers, cress, lettuce, parsley, peas (green), radishes, rhubarb, spinach, spring onions and tomatoes, packed in wooden cases, strong cardboard containers or in tins enclosed in wooden cases, carried by Passenger train at the convenience of the Commissioner for any distance within the State, will be:-

	<u>Each</u>
	<u>s. d.</u>
Standard two-bushel case or container ..	2. 9
Case or container not of standard capacity weighing from 57 lb. to 112 lb. ..	2. 9
Standard bushel case or container ..	2. 0
Case or container not of standard capacity weighing from 29 lb. to 56 lb. ..	2. 0
Standard half-bushel case or container ..	1. 0
Case or container not of standard capacity weighing from 15 lb. to 28 lb. ..	1. 0

Two or more cases of standard capacity securely fastened together which do not exceed the capacity of a standard half-bushel or standard bushel case will be charged for at the half-bushel case rate (1s.0d) or bushel case rate (2s.0d), respectively.

Two or more cases not of standard capacity securely fastened together which do not exceed 28 lb. or 56 lb. in weight will be charged for at the half-bushel case rate (1s.0d) or bushel case rate (2s.0d), respectively.

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- (2) Fruit and vegetables specified in Clause 1, when packed in tins, or in cases not of standard capacity exceeding 112 lb. in weight, will be charged for at Half Stamped Parcels (Prepaid) Rates.
- (3) The maximum rate for one wooden case of FRESH FRUIT not exceeding quarter-bushel size, consigned DIRECT FROM GROWER TO CONSUMER, and forwarded any distance within the State at the convenience of the Commissioner, will be 9d.
- (4) Freight must be prepaid when consigned to an unattended station. When freight is booked "to-pay" to a station where there is an Officer-in-Charge, an additional 25 per cent. (not to exceed 1s.0d) of the total freight will be charged. This additional charge will not apply when a consignment is despatched from a station at which Parcels Stamps are unprocurable.

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#### MARKETING PROPOSALS - AUSTRALIAN APPLE AND PEAR CROP.

The Minister for Commerce has announced that the Commonwealth Government plans to acquire and dispose of the Australian 1939/40 apple and pear crop. This has been deemed advisable in view of the probable limitation of shipping space available for the transport of the surplus production to overseas markets.

Some of the chief points of the proposed plan are stated to be:-

The scheme to be managed by the Australian Apple and Pear Board, with the assistance of controlling committees in each State.

The flow of fruit to local markets to be regulated, taking into consideration the dates of maturity of the crops in the chief producing districts and having regard to the cool storage facilities of the different States.

Export to be co-ordinated and full use made of any shipping space to overseas markets.

Growers to be registered, and their marketings to be controlled by licensing and direction.

The marketing to be conducted under a pooling system and growers to receive an advance of 2/- per case on apples and 3/- per case on pears, this to apply to 75% of the estimated commercial crop.

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SHEEP AND CATTLE SALES AT HOMEBUSH, SYDNEY.

Large number of sheep and lambs marketed.

The market at Homebush during October was particularly well supplied with lambs but the actual yardings of grown sheep were not so heavy. Perhaps one of the heaviest receivals of lambs ever recorded on any one day in the history of the Homebush saleyards occurred when 78% of the penning comprised lambs and suckers. During October an aggregate of 450,475 head of sheep and lambs was received, or 114,183 more than during the previous month; yardings at Homebush for October, 1938, amounted to 404,624 head. One of the main factors contributing to the exceptionally heavy consignments is the desire of producers to market their lambs as soon as possible, having in mind, of course, quality and finish, and thus avoid the grass seeds, which at certain times of the year seriously affect the lamb carcasses. The lamb season is somewhat later than usual, while over a large area of country grass is plentiful, so that grass seeds are expected to become more troublesome with the approach of warmer weather. As it is, some of the suckers at present coming forward have been affected with seed.

Scarcity of light trade sheep.

In direct contrast to the heavy consignments of lambs and suckers, grown sheep were in somewhat short supply and even more noticeable was the scarcity of light trade sheep, that is lines dressing from 36 to 42 lb. of mutton which are so much desired by operators for the local retail trade. Heavy sheep, however, comprised a fairly large proportion of the available supplies, animals dressing from 50 to 60 lb. of mutton being well represented. On occasions, too, sheep of up to 70 lb. dressed weight were noticed and at times it was difficult for the trade to absorb so much of the heavy class of mutton. Sheep of this class were overfat, other than for export purposes. Very few sheep in wool were yarded during October, practically all lots available being "off shears".

Values of heavy sheep weaker.

The continued preponderance of heavy weight descriptions, chiefly wethers, and the inability of local trade channels to absorb this class of mutton, caused a steady decline in values, the fall being more pronounced on sheep from 56 lb. weight upwards. This was in direct contrast to the strong demand prevalent during September and, although some of the fall must be allowed for in the price of mutton, a fairly substantial portion of the decline was attributed to lower skin values. Speaking briefly of the skin market, several auctions were held in October at which prices were considerably below those anticipated by the operators and other interests at Homebush, with a consequent adverse reflection on the rates paid for sheep on the hoof at the saleyards. The

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position generally in regard to skins is still a little uncertain but some measure of stability may be expected in the near future. Referring again to heavy weight mutton, a fair indication of the trend in prices is illustrated by the following actual sales. Good heavy woolly wethers weighing 56 lb. sold during early October cost 3d per lb. On the following saleday 54 lb. sheep were obtained for 2 $\frac{3}{4}$ d per lb. Later in the period sheep of similar weight were purchased for 2 $\frac{1}{2}$ d per lb. Towards the close of the month, however, lighter supplies of sheep promoted a much stronger demand and values improved, a line of 56 lb. wethers realising the equivalent of 2 $\frac{3}{4}$ d per lb. Summed up, a downward trend in prices of heavy sheep was evident for the greater part of October but the smaller yardings at the end of the month resulted in a partial recovery in values, which were, however, from  $\frac{1}{4}$ d to  $\frac{1}{2}$ d per lb. below those ruling at the opening sales, sheep dressing from 56 lb. upwards being affected most.

Although on occasions slight irregularities were apparent in the rates for light weight sheep, the market for the most part was fairly steady, closing prices approximating those obtained early in the month. Light trade sheep met a remarkably steady demand at satisfactory rates, the consistently high levels of the previous month being well maintained.

The average range of prices per lb. for light weight wether mutton was from 3 $\frac{1}{2}$ d to 4d per lb., the largest proportion of the mutton making 3 $\frac{3}{4}$ d per lb. Heavy sheep ranged from 1 $\frac{5}{8}$ d to 3d per lb., according to weight, but by far the largest volume of sales occurred at from 2 $\frac{1}{4}$ d to 2 $\frac{3}{4}$ d per lb. Ewes, which were slightly more numerous than during September, did not fluctuate to such a marked degree as wethers, heavy descriptions selling at from 1 $\frac{3}{4}$ d to 2 $\frac{3}{4}$ d per lb., with odd lots to 3d, and light realising from 2 $\frac{3}{4}$ d to 3 $\frac{1}{2}$ d, with a few making to 3 $\frac{3}{4}$ d per lb. A good percentage of the sales, however, were in the vicinity of 2 $\frac{1}{2}$ d for heavy and 3 $\frac{1}{4}$ d per lb. for light ewes.

Shorn sheep comprised by far the greater proportion of the pennings and realised to 19/- per head. Odd lots of full-woolled sheep sold as high as 25/- per head, but supplies were only relatively small.

#### Large percentage of suckers and lambs.

During October, the yarding of lambs and suckers was particularly large and attained record proportions. On the occasion previously mentioned, when lambs and suckers constituted 78% of the total penning, 45,500 head out of the aggregate of 58,871 were received and at other times they represented 70% or more of the supplies forward. Good quality suckers were numerous and, considering the heavy consignments, the percentage of quality lambs was very creditable. In common with the sheep yardings, heavy weight lambs and suckers were plentiful but there was also quite a fair showing of light weight descriptions, although some of these latter were starting to go back and were inclined to be dry.



A feature of the market was the sale of a consignment of Dorset Down lambs, said to be the first line of this breed offered at Homebush or in the Commonwealth. The lambs in question were in prime condition and of nice appearance. Although far too heavy for the trade, they killed out nicely, the carcasses showing a good proportion of flesh to fat; had they been marketed at a lighter weight, they would have been much better received by operators.

### Strong lamb market.

Despite the increased yarding of lambs, a consistently good demand prevailed and prices, although not as high as the peak rates obtained in September, could be regarded as very satisfactory under the circumstances. Little variation was apparent in the market for good light lambs or suckers until about mid-October, when a fall of up to 1/- per head occurred; before the close of the period, however, values had fully recovered. Medium to plain lambs and suckers and those affected with seed sold at prices a little below those of the preceding month, being from 1/- to 2/- per head cheaper.

It was particularly noticed that towards the end of October there was a much better inquiry for heavy lambs and suckers, the announcement of the prices at which meat was to be acquired by the British Government having a stimulating effect on lamb values. Contrary to the usual basis of valuations, the heavy class of suckers weighing from 34 to 38 lb. on occasions realised more per pound than some of the light weight descriptions. Reference to some of the sales during the period will serve to illustrate this phase. A draft of good quality Border Leicester Cross suckers weighing 38 lb. sold about mid-October at 5½d per lb. or 21/11 each. Towards the end of the month a line of Southdown Cross suckers weighing 37 lb. realised 23/2 per head or 6¼d per lb. In places, too, quality lambs weighing 36 lb. made 6½d per lb., the same rate as some of the choice light suckers dressing only 30 lb. Exporters were very active towards the close and suitable export lambs met with a brisk demand. Best quality suckers sold at prices ranging from 5¾d to 6½d per lb., with other grades bringing from 5d to 5¾d.

Several lines of exceptionally heavy lambs and suckers made to 27/- per head and a large percentage of the better grades realised from 18/- to 25/- each. Plain and inferior types sold from as low as 11/- per head.

### Prices 12 months ago.

It is interesting to compare the rates for mutton and lamb ruling during October 1938 with those for October, 1939:-

		<u>October, 1938.</u>	<u>October, 1939.</u>
Suckers	...	5¾d to 7¼d per lb.	5d to 6½d per lb.
Lambs	...	4½d " 6d " "	4½d " 5¾d " "
Wethers	...	1¼d " 3½d " "	1¾d " 4d " "
Ewes	...	1¼d " 3¼d " "	1¾d " 3¾d " "

/The ....



The exceptionally high prices for suckers in 1938 was due to the scarcity of good quality owing to the bad season. Grown sheep were available in greater numbers during October last year but the quality was not nearly so good, so that the prevailing rates were lower.

Slight increase in cattle supplies.

In like manner to that experienced during past months cattle have arrived at Homebush in consistent numbers, generally about 2,500 each sale day. The grand total for October was slightly in excess of September offerings and amounted to 23,677 head, including approximately 1,400 bulls and stores and a small consignment of about 200 "fats" from Queensland. It was pleasing to note that stock were, for the most part, in fine condition, evidence enough that the producing areas of the State are enjoying a particularly favourable season. Reports from practically all parts of New South Wales indicate a continuance of these conditions that have been so beneficial. A very different state of affairs existed at this time last year; the outlook then, to say the least, was disheartening. However, it seems that now, when we must rely perhaps more than ever before on our primary products, nature has come to our aid to do, as it were, her part in the national effort.

Announcement of beef export prices.

The prices to be paid by the British Government for Australian beef exports have been announced. The agreement between the two countries provides for the purchase of the exportable surplus for the twelve months ending 30th September, 1940. The following are the rates for the principal lines, in Australian currency, f.o.b.:-

Beef (Frozen): First quality ox:- hinds 5 15-64d,  
crops 3 9-32d; Second quality:- hinds 4 19-64d,  
crops 3 13-64d per lb.

It has been stated that prices will be announced in greater detail later. The agreement provides that 90 per cent. of the purchase price will be paid on shipment. Further, there will be no disturbance of the existing channels of distribution.

These rates will, no doubt, have a steadying effect on values at Homebush.

Values for bullocks and steers generally firm.

Well-grown bullocks were not seen in the proportion that is usual but there appeared to be sufficient to meet requirements. Heavy descriptions were fairly well in evidence, comprising lots from Queensland as well as this State. Whilst some were rather coarse in appearance, a fair percentage was very attractive. Towards the close of the period some outstanding consignments were auctioned, and it is proposed to detail two of these sales. About



50 Shorthorns from Byrock sold to £16.0.0 per head and averaged £14.7.9; the top pen was estimated to weigh approximately 1,000 lb. per head, and realised the equivalent of 32/- per 100 lb. on the hoof. Another lot (Herefords) trucked at Coolah was especially good, the heaviest of the draft bringing £16.11.0 each, or about 33/- per 100 lb. on the hoof, while a lighter yard made £13.8.0 per head. Other notable sales could be quoted where disposals were equally satisfactory. It was again evident that good medium to heavy bullocks were making about as much on a dressed weight basis as the light descriptions.

Steers were generally well represented and considerable numbers were of good quality, while on several occasions drafts were seen that were as near perfection as could be attained. Values realised indicated minor variations throughout the month, but in the main a consistent trend in buying was evident. Fair to good trade lots frequently made the equivalent of 32/- to 33/- per 100 lb., while prime grade consignments went as high as from 34/- to 36/- per 100 lb.

Good quality cows available but rates unsteady.

Throughout the period good quality cows made a very fair showing as regards numbers but were not always in request; the rates paid towards the close, however, were satisfactory and compensated for those days when prices were low and unsteady.

On some days plain and inferior descriptions were too much in evidence and detracted from the otherwise good yarding. Prices paid for these lines, although much lower, were nevertheless very fair returns for the type of beef.

Prime heifers well in evidence.

The heifers on offer ranged, for the most part, from fair trade to prime, with a satisfactory proportion of the latter. On some occasions well-bred heifers would undoubtedly have brought more money had they carried a little less condition. Of the good quality lots, several sales were noticed at from £8.10.0 to £9.10.0 per head, while many lighter weight sorts were disposed of at about £7.0.0 to £7.15.0 each.

Vealers rather scarce towards the end of the month.

During the early part of the month yardings comprised a fair percentage of vealers, usually ranging from fair trade to moderate numbers of prime. Later offerings, however, were marked by short supplies, especially of the very young light weight descriptions, and the price on the hoof showed a tendency to increase.

Market compared with last year.

In concluding the review it may be of interest to compare present realisations with those for October last year.  
/Prime .....



Prime grades of cattle were very much dearer twelve months ago than at present but so few good cattle were available then that the collective benefit to owners must have been only small. The difference in rates for prime cattle on a dressed weight basis, as quoted in October, 1938, and October, 1939, amounts to from 8/- to 10/- per 100 lb. Current values, however, are very satisfactory and, in view of the agreement with the British Government regarding the purchase of the surplus beef, it seems likely that these will be well maintained.

G.C. & A.T.

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

Excellent market for potatoes.

During October the first consignments of the season's crop of new potatoes were on offer, both at Alexandria and in Sussex Street, and it was noticeable that the general quality was very good, the only fault being that some stocks were too new to carry-over, so that such supplies had to be cleared as quickly as possible. In the "old" potato section, Tasmanian growers forwarded 62,324 bags to Sussex Street. In the first week of October, the market prices for Tasmanian varieties were £3 per ton below those ruling at the end of September, but next week the rates for all lines rose by £3. As stocks were well within buyers' requirements and an exceptionally firm inquiry prevailed, a further increase occurred the following week, bringing the price for No.1 Grade Brownells to £25 per ton. In the fourth week this quote was advanced to £26, but a sharp reduction of £8 to £18 per ton took place on 30th October, due to the fact that local new potatoes were available in substantial quantities. The month's range of prices for Tasmanian tubers was as follows:- Brownells No.1 Grade £18 to £26, No.2 Grade £12 to £18, Snowflakes £17 to £24, while Arranchiefs, which came to hand in the first week only, realised £20 per ton.

Other receipts of potatoes in Sussex Street comprised:- Victorian - Old 969 bags; Queensland, Old and New 1,398 bags; Western Australian - New Delawares 2,339 bags; Northern Rivers (N.S.W.), New and Old - 3,126 bags. The Victorian offering was mainly of the Carman variety and was disposed of at prices ranging from £20 to £24 per ton. On the arrival of only a small consignment of Western Australian Delawares towards the latter part of the month the market for this variety was very firm at £28 but larger quantities came to hand in the final stages and clearances were effected at the reduced rates of £22 to £23 per ton. The Queensland stock was of good quality and realisations were as follow:- Old - No.1 Grade £20 to £26, Seed Grade £19 to £20; New - New Grade £26 to £28 per ton. Following the procedure adopted last season, the Northern Rivers new tubers were offered by auction on the North Coast wharves in Sussex Street. At each sale the attendance of

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buyers was very large and disposals throughout the month were excellent. The demand at the start of operations was very good and prices were as high as £29.5.0 per ton for prime new grade lots but as increased stocks became available, rates fell, although the request was still firm. Realisations at auction were:- Old - No.1 Grade £20.10.0, No.2 Grade £17.10.0 per ton; No.2 Grade 14/-, Chat Grade 12/3 per bag; New - New Grade £18 to £29.5.0, No.2 Grade £11.5.0 to £24.10.0 per ton; No.2 Grade 15/3 to 17/-, Chat Grade 6/- to 26/3 per bag.

Arrivals of potatoes at the Alexandria Railway Goods Yard during October consisted of the following quantities:- Local - Tableland (Old) 2,426 bags; Coastal (mainly New) 4,108 bags; Queensland (Old) 448 bags. The market was similar to that in Sussex Street and vendors had little difficulty in clearing stocks. The Queensland offering was of satisfactory quality and brought from £20 to £22 per ton. In the local section, trading was very brisk, the auctions being well attended and sales were readily made at the following rates:- Local - Old - No.1 Grade £18.10.0 to £25.10.0, No.2 Grade £14.15.0 to £23.0.0, Chat Grade £7.10.0 to £16.15.0, Seed Grade £7.0.0 to £21.5.0, Second Growth Grade £15.0.0 to £23.0.0, Stock Feed £3.10.0 to £18.15.0 per ton, Chat Grade 5/9 to 18/-, Stock Feed 16/- to 20/6 per bag; New - New Grade £18.5.0 to £29.10.0, No.2 Grade £12.0.0 to £27.5.0 per ton, No.2 Grade 27/6, Chat Grade 7/6 to 29/3, Stock Feed 8/6 to 16/6 per bag.

#### Increased arrivals of local white onions.

Shipments of onions to Sussex Street during October totalled 2,240 bags of Brown and White varieties from Queensland. The market was steady and sales were recorded at prices ranging from £12 to £20 per ton, according to quality. In addition to the abovementioned receipts from Queensland, Egyptian Brown onions, carried-over in the stores from September's stocks, were available at £23 per ton plus sales tax. The outstanding feature of trading in this section was the increased arrivals of local White onions at Alexandria. The 4,251 bags at rail were of very mixed quality and were disposed of at the following rates:- By auction - Table £9 to £24, Pickling £16; By private treaty £8 to £19 per ton, quotations varying according to quality. In addition, Queensland growers forwarded 188 bags of the White variety by rail, and clearances by auction were recorded at £5 per ton. A novel experience for Alexandria was the receipt of 95 bags of Egyptian Brown onions, railed from Queensland; this offering was of only fair quality and was somewhat difficult to sell at £18 per ton plus sales tax.

#### Moderate request for Queensland pumpkins.

Queensland growers shipped 3,500 bags of pumpkins to Sussex Street during October. As these supplies were much larger than those of the previous month, the market was only moderately steady at prices ranging from £6 to £7.10.0 per ton. The 87 trucks railed from the same State to the Alexandria Railway Goods Yard

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met a similar demand to that in Sussex Street and deliveries were taken at from £4.10.0 for medium to £8 per ton for prime lots. The 2 trucks of local origin in position at Alexandria were sold partly by auction at £4.15.0 and partly by private treaty at £6.5.0 per ton.

Lighter stocks of Tasmanian vegetables.

Supplies of other vegetables from Tasmania during the month were much lighter than those during September. The 930 bags of swedes in position on the Sussex Street wharves were in good demand at from £3 to £7 per ton. Only 204 bags of carrots were received early in the month and these were disposed of without difficulty at from £10 to £14 per ton. The general quality of the 313 bags of parsnips on offer was only fair and accordingly prices ranged from £5 to £19 per ton. Receipts of vegetables at Alexandria comprised 1,655 bags of swedes and 4 bags of parsnips. These cleared steadily at the following rates:- Swedes - By auction £1.13.4 to £4.10.0, By private treaty £3 to £6; Parsnips - By auction £6 per ton. No supplies of Tasmanian Blue peas came to hand in Sussex Street but the Grey variety cleared very firmly at the unaltered rates of from 11/- to 11/6 per bushel.

Dull inquiry for white chaff.

New South Wales producers forwarded 263 trucks of Oaten and 45 trucks of Wheaten chaff to Alexandria during October. For the most part, the market remained dull and only small quantities were cleared from agents' hands at the following quotations:- Oaten - Medium and inferior £3 to £4, good £4.5.0 to £4.15.0, prime and extra prime to £5.5.0; Wheaten - Medium £2.15.0 to £3.5.0, good £3.10.0 to £4.0.0, prime and special £4.5.0 to £4.15.0 per ton.

General quality of lucerne only medium.

Arrivals of lucerne chaff at Alexandria during the month totalled 91 trucks. This stock was approximately the same as that for September and, being of very mixed quality also, was sold at prices ranging from £3.15.0 for medium and inferior lots to £7.0.0 per ton for prime green leafy supplies. The 448 bales of Hunter River lucerne hay shipped to Sussex Street were mainly of the New Green variety and realised from £2.15.0 to £4.0.0 per ton, the market being much easier. Consignments to Alexandria comprised 54 trucks from Maitland and 139 from other centres. The Maitland variety met a similar demand to that ruling for Hunter River stocks in Sussex Street and clearances were only fairly steady at the following rates:- New Green £2.10.0 to £4.10.0, Dry £4.0.0 per ton. On inspection it was seen that large quantities of "grassy" hay had been railed from other centres and such stocks were in limited request, even at the reduced rates of from £1.10.0 to £2.10.0, with odd lots to £3.0.0 per ton. A better inquiry prevailed for other qualities and varieties, these bringing from £3.10.0 to £7.0.0 per ton according to quality.



No stocks of Victorian special oaten hay came to hand in Sussex Street. Only a portion of the 23 trucks of oaten hay railed from New South Wales districts to Alexandria was available for sale and this was disposed of at from £3.10.0 to £5.0.0 per ton. The 5 trucks of wheaten hay in position were offered at from £2.17.6 to £3.10.0 per ton.

The 1,894 bales of Tasmanian straw received in Sussex Street were well within trade requirements and quotations were slightly firmer at from £5.10.0 to £5.15.0 per ton. The 73 trucks which arrived at Alexandria were of mixed quality and brought from £3.10.0 to £5.0.0 per ton.

Improved demand for wheat and maize.

Receivals of grain at the Alexandria Railway Goods Yard comprised:- Wheat 62 trucks; Maize - Queensland 3,510 bags, Local 2,775 bags; Oats 50 trucks. In addition, local growers shipped 1,236 bags of maize to Sussex Street. The wheat market was much firmer than that for September and, although more heavily stocked, maize also was in good request at slightly higher prices; on the other hand, disposals of oats were only fair. Realisations were as follow:- Wheat - By auction 1/8 to 3/-; By private treaty 2/3 to 3/1; Maize - At Alexandria - Queensland yellow 4/5 to 4/9, Local yellow 4/6 to 4/9; In Sussex Street - Northern Rivers yellow 4/6 to 4/7; Oats - By auction 1/5<sup>1</sup>/<sub>2</sub>d to 1/10<sup>1</sup>/<sub>2</sub>d; By private treaty 2/2 per bushel.

E.A.G.

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According to press statements, the Australian Minister for Customs intends to introduce a bill in the next session of the Federal Parliament to continue the wine export bounty. The present bounty of 1/- per gallon will expire on 29th February, 1940, and the Minister proposes to continue this rate for a further period of five years.

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In a recent report, the Australian Dried Fruits Association stated that the sale of surplus dried fruits to the British Government had been arranged by the Commonwealth Government through the Commonwealth Dried Fruits Control Board.

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

Steady trading was apparent throughout the month of October and clearances of most kinds of fruit were, for the most part, very satisfactory.

Rates for Valencia oranges fluctuate.

Wet weather at the end of September having interfered with harvesting operations, only relatively light supplies of Valencia oranges were available early in October and disposals were readily effected at enhanced prices. Later, increased quantities came forward but stocks were by no means heavy. A quiet demand was experienced, however, and the high values could not be maintained but receded to former levels. Towards the end of the month supplies were again light and prices showed an upward trend, closing rates being the highest for the period.

Navel orange season ends.

The end of the season for Navel oranges being at hand, only small quantities were received from New South Wales districts. Very satisfactory prices were realised for the better quality lines, some sales being recorded to 18/- per case. Moderate consignments came to hand from Victoria throughout the greater part of the month but from the third week onwards they were somewhat slow of sale and were offered at reduced rates to facilitate clearances.

Scarcity of quality lemons and grapefruit.

Only relatively small stocks of lemons were available early in the period and choice coloured descriptions brought enhanced rates. These higher prices induced growers to forward green and immature fruit from the spring crop but disposals were difficult to effect even at low levels. Choice coloured lots, however, continued to sell readily at satisfactory rates.

Grapefruit, also, was scarce, particularly special grades, and sold to advantage, although much of the fruit was rather too large for ordinary trade requirements.

Heavy supplies of bananas.

Arrivals of bananas on the Sydney market for the month from North Coast districts totalled 39,218 cases, while a further 9,642 were received from Queensland, making a grand total of 48,860 cases. Despite the heavy supplies, values of quality lines were fairly evenly maintained throughout. A considerable proportion of the offerings consisted of undersized and inferior fruit, which, with fully ripe lots, had to be disposed of at relatively low prices.

/Pineapples .....



Pineapples plentiful.

Pineapples also were heavily stocked, approximately 29,500 cases coming to hand from Queensland. Trading for the month opened with values showing a considerable fall, due to adverse weather conditions and a reduced selling period owing to the intervention of the Eight Hour Day holiday. Later, demand improved, allowing vendors to clear the bulk of their supplies before the arrival of fresh consignments and to increase prices. Towards the end of October, however, exceptionally heavy arrivals resulted in lower values.

Choice passion-fruit realise high prices.

Passion-fruit were scarce throughout the period and only a small percentage of the available supplies was of choice quality. Adverse weather conditions, such as frost, had a detrimental effect on crops and much fruit that had failed to fill found its way on to the market but had little value. Choice quality lines, however, were sought after and prices steadily advanced until at the end of the month special grade descriptions realised as high as 25/- per half-case.

The 1939 cherry season opens.

October saw the commencement of the 1939 cherry season. The first case was received from the Lakesland district about the middle of the month and was purchased for 20/-. Steadily increasing supplies were responsible for a gradual decline in values, until the market eventually settled down at 8/- to 12/- per quarter-case for the best quality fruit, with lower grades cheaper.

Early apricots received from local sources.

Early apricots - the first of the season - were received from local sources, notably Kurrajong, and realised very satisfactory prices.

Dessert apples dearer.

With the arrival of smaller shipments of apples from Tasmania during the first half of the month and only limited quantities coming forward from Victoria and New South Wales districts, supplies of coloured dessert descriptions were relatively light. Consequently, with choice lines in request, prices advanced by 1/- to 1/6 per case and, although subsequent Tasmanian consignments were heavier, these high values were well maintained. Local Granny Smiths were plentiful at first and the market had an easier tendency, but later supplies decreased and best quality lots sold at firmer rates.

Most kinds of vegetables clear satisfactorily.

Generally speaking, trading in the vegetable section of the Municipal Markets was fairly active and clearances were satisfactory.



Variable market for peas.

Peas were in relatively light supply (as were most kinds of green vegetables) owing to the wet weather during the early part of October, and values advanced, sales of choice lines being recorded to 14/- per bushel. Subsequently, however, heavy arrivals resulted in a sharp decline in values. The market improved again about the middle of the month, but only temporarily, as by the close of the period prices had receded to former levels.

Choice beans sell well.

Only comparatively small consignments of beans were received from Queensland and the North Coast districts of New South Wales, the bulk of the supplies coming forward from the Gosford district. Stocks were light early in the month and choice lots were in demand. As a result, prices rose to high levels, up to 18/- per bushel being obtained with odd lots to 20/-. Subsequently, increased quantities were available and lower rates were accepted to stimulate sales. By about the end of the third week prices had fallen to 6/- to 8/- per bushel, but from then onwards values showed an upward trend, closing quotations ranging from 7/- to 9/- with a few lots to 10/- per bushel.

Satisfactory clearances of choice cabbages.

Clearances of choice quality cabbages were satisfactory particularly during the early part of the period when a steady upward movement in values was evident. Later, increased quantities were on offer and the request for medium and lower grades was very limited, so that prices generally receded to relatively low levels, closing rates being from 1/- to 5/- per dozen.

Downward trend in values of tomatoes.

Consignments of tomatoes aggregating some 65,000 odd half-cases for the month were received from Queensland. These were supplemented by moderate to fairly heavy supplies from local glasshouses, while from about the beginning of the third week onwards field grown lots from the North Coast made their appearance on the market. Very satisfactory prices were realised early in the month, up to 20/- and 25/- per half-case being obtained for local glasshouse and hothouse, respectively. The market fluctuated somewhat during the balance of the period but the general trend of values was downward, with a sharp fall evident at the end of the third week.

E.J.C.



WHOLESALE PRICES OF VARIOUS COMMODITIES IN  
SYDNEY (N.S.W.) DURING OCTOBER, 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 various commodities during the month of October, 1939:-

<u>Commodity</u>	<u>From</u>	<u>To</u>
Wheat (1938/39 season's):		
Bulk	2/7d	2/8d per bushel
Bagged	2/8d	2/10d " "
(Line orders and truck lots 1d higher. From 11th October prices were fixed by the Australian Wheat Board).		
Flour	£7.12.3 (plus £5.2.9 tax)	£8.2.6 per ton (plus £4.12.6 tax)
Bran	£3.15.0	£4.10.0 per ton
Pollard	£3.15.0	£4.10.0 " "

Eggs (Hen) 1/- per dozen (no variation).

Butter:		
Choice	161/2d per cwt.)	
First Quality	156/6d " " )	no variation.
Second Quality	151/10d " " )	

Cheese:	
Loaf 1ld per lb.)	no variation.
Large 10 <sup>1</sup> / <sub>2</sub> d " " )	
Special brands	1/-

1/1d per lb.

Pigs (Abattoir Sales):		
Prime extra light porkers	32/6d	45/6d per head
" light porkers	40/6d	50/6d " "
" med.wgt. "	45/6d	60/6d " "
" heavy "	53/6d	63/6d " "
" baconers	63/6d	89/6d " "
Backfatters	£4.5.0	£10.10.0 " "

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WOOL SALES.

In view of the purchase of the surplus Australian wool production by the British Government, wool supplies in future will be appraised by representatives of the Australian Central Wool Committee and the selling brokers, and auctions will not take place as heretofore.

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RETURN OF FRUIT AND VEGETABLES IMPORTED INTO NEW SOUTH WALES  
BY LAND AND SEA - SEPTEMBER, 1939.

F R U I T.

STATE	Pineapples tropical cases	Bananas tropical cases	Other Fruit cases	Tomatoes half-bushel cases	TOTALS packages
Queensland	29,040	14,317	7,723 <sup>x</sup>	79,061	130,141
Victoria	7	124	9,742	4,769	14,642
Tasmania	-	-	116,510	-	116,510
Sth. Aust.	-	-	1,852	705	2,557
West Aust.	-	-	8,565	8,873	17,438
TOTALS:	29,047	14,441	144,392	93,408	281,288

x Also 3,953 trays Strawberries.

V E G E T A B L E S.

STATE	Potatoes	Onions	Swedes	Pumpkins		Cucs. & Chillies	Other Veggies.		TOTALS	
	bags	bags	bags	bags	Tons	cases	Pkgs.	Tons	Pkgs.	Tons
Queensland	27,758	751	-	5,951	1,359 $\frac{1}{4}$	1,956	11,220	18 $\frac{1}{2}$	47,636	1377 $\frac{3}{4}$
Victoria	12,137	1,613	365	-	-	-	7,592	-	21,707	-
Tasmania	58,705	-	1,733	-	-	-	1,893	-	62,331	-
Sth. Aust.	536	258	-	-	-	-	11,431	-	12,225	-
West Aust.	-	-	-	-	-	-	-	-	-	-
TOTALS:	99,136	2,622	2,098	5,951	1,359 $\frac{1}{4}$	1,956	32,136	18 $\frac{1}{2}$	143,899	1377 $\frac{3}{4}$



39.1

# HIDES

## CHANNELS OF DISTRIBUTION

39.1197

### ABATTOIR HIDES (Homebush-Sydney: taken off cattle at Abattoirs)

Private Sales to Tanners

Sold as leather  
by Tanners

Hide stores for grading  
and cataloguing

Sold at Auction  
at Royal Exchange

Tanners

Sold as leather  
by Tanners

Exporters

### COUNTRY HIDES (taken off cattle at country centres)

Private Sales to Country Buyers

Private Sales to  
Country Tanners

Sold as leather by  
Country Tanners

Sydney Hide Stores for  
grading & cataloguing

Sold at Auction  
at Royal Exchange

Tanners

Sold as leather  
by Tanners

Exporters

**NOTE** — Proclamation prohibiting export of hides  
and skins gazetted 20-9-39.  
(Furred skins and woolled sheepskins may  
be exported under permit.)

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Compiled - G.C.  
Drawn - E.H.S. 1-11-39.  
Checked - G.J.

A. A. WATSON  
DIRECTOR OF MARKETING.  
1-11-39