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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. 4

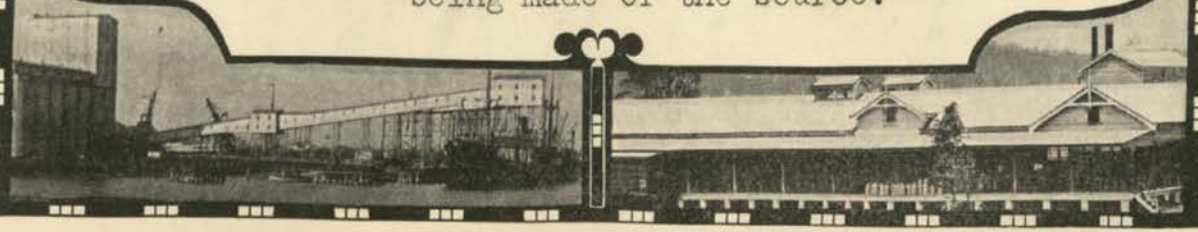
DECEMBER, 1939

No. 8

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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

Federal Government proposes convening special
conference early in 1940 to consider plans for
restricting wheat production.

First advance to wheatgrowers in respect of wheat
from 1939/40 season increased to 2/10^d per bushel
bagged and 2/8^d bulk, on rail at ports.

Director of Marketing's final official forecast of
wheat yield for New South Wales for 1939/40 crop is
66,000,000 bushels.

Australian Hide and Leather Industries Board appointed
by Commonwealth Government to control sale of cattle
hides locally and for export.

British Government will purchase Australian egg
supplies at following rates:-

| | | | | | | | |
|--------------------------------|----------|---|----------|----------|-----|------|----------|
| 13 ¹ / ₂ | lb. pack | - | 7/11.07d | sterling | per | long | hundred. |
| 14 | " | " | - | 8/6.85d | " | " | " |
| 15 | " | " | - | 9/9.5d | " | " | " |
| 17 | " | " | - | 9/10.6d | " | " | " |

All prices on basis of f.o.b. Australian ports.

METHODS OF SELLING FISH WHOLESALE.

Address by Director of Marketing (Mr. A.A. Watson).
to the Fishing Industries Association of New South Wales
on 23rd October, 1939.

I am concerned to raise the question as to the best method of selling fish wholesale. The question is one of very great importance, however you view it. My interest in it is due primarily to experiences incidental to the collection of prices at Sydney's Municipal Fish Market.

It may be postulated that that system of selling fish is best which is best calculated to make the catching of fish sufficiently profitable and the household consumption of fish sufficiently economical: I very respectfully put it to you that the interests of the wholesale seller, as such, whoever and whatever he may be and wherever he may operate should be such as will not operate to the detriment of these requirements.

Of course, the wholesale seller must make adequate provision for the financing of his undertaking and I am not disposed to the view that the wholesaling of fish is easier or freer from complexities than the wholesaling of, say, fruit or vegetables. All such wholesaling, as a matter of fact, is beset with difficulties and problems and these demand that the wholesaler shall have knowledge and experience in no inconsiderable degree and of a special kind. Capital, also, is a prime necessity. Taken all in all, the wholesale seller has as responsible and difficult a job as his confreres handling many other primary products and is equally entitled to a commensurate reward for his services. That, however, is not the question I am raising. The question is whether the system of wholesale selling of fish in our Fish Market is the one that best promotes the interests of producers and consumers and thereby best serves the public interest.

I approach this question with an open mind and in the belief that every wholesaler will agree that the form the particular service, that of selling fish wholesale, may best take should be considered dispassionately. Systems, after all, are evolved to meet circumstances and conceptions of the public weal that change from time to time. Nothing in this 'vale of tears', nothing, that is, of a material character, evades the law of change.

It is probably correct to say that, in the final analysis, all systems of wholesaling fish resolve themselves into one of two, viz., sale by auction and sale by private treaty. Examples of both these systems can be found in the various Fish Markets of the world and it should be practicable to determine which of them is in the best interests of producer and consumer, or whether the merit of each of them is governed by conditions that vary in different localities and may favour either system.

/I have

I have already said that my approach to the question is an open-minded one. I think, however, that you have a right to expect from me that perfect candour which is the shining characteristic of a Civil Servant. In my consideration of the Sydney Fish Market I have often wondered whether auction selling of fish would not be just as practicable as the auctioning of sheep or cattle at Homebush Saleyards or of potatoes at Alexandria. Admittedly, auction might necessitate a different market lay-out from that now used for private treaty selling, but one assumes and everyone, I think, will agree that selling methods must govern market facilities: I mean that markets, like factory buildings or newspaper offices, should serve and not determine the business methods of those who occupy them. It is further due to you to say that it has appeared to me that prices levels might be more satisfactorily determined in the Fish Market by auction than by private selling. It may be suggested that auction selling might present little advantage to buyers if the quantities of fish available were not known to them. Admittedly that could be so, but prospective buyers of sheep, cattle, pigs and calves at Homebush and of potatoes at Alexandria are in a position to obtain that information from disinterested and responsible authorities before commencing to bid. Possibly the same or similar arrangements could be made with respect to fish. There is also the question of concerted bidding to the detriment of true competition and the possible defeat of the system of auction, but it may be that equally serious possibilities could be cited in connection with private treaty selling. The fact is that both systems have their exponents and advocates. I am not prepared to say either that there are or that there are not weightier reasons for one system or the other at the Sydney Fish Market, but I do seriously suggest that the time has arrived for us to consider whether we are abreast of the times and as efficient as we should be in this highly important respect.

Of course there is far more in the problem of marketing fish to the best advantage of producer and consumer than the system of selling at the Municipal Fish Market. In the five minutes at my disposal, however, I have selected this question as one worthy of attention. After all, we can only deal with one question at a time and if I have been rash in selecting this one, at least it will be the means of letting you know where a need for information exists.

-----oooOooo-----

In furtherance of the Federal Government's scheme to acquire the whole of the Australian pome fruit crop as from 1st March, 1940, it has been announced that every grower of one acre or more of apples and/or pears must apply for registration and submit particulars of the number of cases of the different varieties of apples and pears produced by them in the years 1937, 1938 and 1939 and an estimate of the yield in 1940. Fruit Inspectors and Instructors have already been supplied with Registration and Estimate Forms for distribution to growers.

- CATTLE, SHEEP AND PIGS -
BREEDS PREFERRED BY OPERATORS AT HOMEBUSH SALEYARDS,
SYDNEY, NEW SOUTH WALES.

Much has been heard in recent years of the ideal type of baby steer and fat lamb for the United Kingdom market, and it is well known that countries such as Argentine and our sister dominion, New Zealand, have achieved rather enviable reputations in their respective spheres by producing an article eminently suited to the needs of this market.

Among the many reasons for this practically undisputed position, and perhaps one of the most important, is the attention given to breeding of the required type of cattle and sheep, having in view continuity of supply of a high quality product.

In both the Argentine and New Zealand conditions experienced are in many respects vastly different from those met in Australia, and, although the former countries may be fortunately placed from some angles, there is no doubt that they faced difficult situations, and are still confronted by problems which remain to be solved if standards achieved in the past are to be maintained.

In Australia much has been done to improve standards of quality and efforts to date have yielded some measure of success, but not, perhaps, as much as could be attained by a concentrated and well-directed campaign on the part of all connected with the industry.

It is not the purpose of this article to offer any criticism of Australian methods or to advance any suggestions as to improving present standards, but to quote as a matter of interest the results of observations at Homebush Saleyards, Sydney, over a period of years by officers of the State Marketing Bureau as to what is actually happening at the largest and most important stock market in the Commonwealth.

No doubt, graziers have, from time to time, discussed the question of the particular breeds of cattle and sheep buyers favoured and whether big operators, who catered largely for the local trade, were keen to secure particular types.

Observations have shown that a definite preference is noticeable for certain breeds of cattle and sheep and also for pigs. It must be remembered, however, that this preference cannot always be exercised for the obvious reason that there is no such thing as continuity of supply of the desired stock.

Cattle - choice of buyers restricted.

So far as cattle are concerned, the claims of the Aberdeen Angus breed are well-known, and Homebush buyers are keen to secure this class of beef, provided it is young and in prime condition.

/The

The opinion has been expressed that for the export trade the Aberdeen Angus steer raised and fattened on the right lines is practically without equal. One fact, however, that cannot fail to impress the observer at Homebush, is that this breed of cattle must be in prime condition, otherwise the majority of operators prefer to overlook them entirely, or, at most, to pay a very low price for them.

In this State, Herefords and beef Shorthorns are numerically strong and herds are well established, so that, naturally, they are much more in evidence at Homebush than other breeds. The better types of Herefords and Shorthorns (and this would include the small numbers of polled stock) are very attractive and meet competition which is, generally speaking, just as keen as for Aberdeen Angus. Moreover, both Herefords and Shorthorns are often the subject of stronger competition because of the hide value which, in certain consignments, particularly of the former breed, is an important consideration in the purchase. Unfortunately, a fairly large percentage of Herefords and Shorthorns marketed at Homebush are not up to modern standards, some being rather coarse in appearance, while a great number carry too much bone in comparison with meat.

Devons and Red Polls are so seldom seen in any great numbers at Homebush that it is difficult to say which of the two is preferred; Devons, however, seem as a general rule to meet better competition, all things being equal.

The order of preference at Homebush, so far as it can be exercised, might therefore be indicated:-

| | | |
|-----------------------------|-----|------------------------|
| (a) Aberdeen Angus | .. | Young and Prime |
| (b) Shorthorns, modern type | ..) | Very little difference |
| (c) Hereford, " " | ..) | |
| (d) Devons | .. | Prime |
| (e) Red Polls | .. | Prime |

The order, as set out, is by no means arbitrary as no absolute preference can definitely be established.

So far as "off" quality stock are concerned, and these are numerous, particularly in bad seasons, Herefords and Shorthorns are usually favoured, as it is claimed that they 'kill out' better than other breeds under adverse conditions.

Sheep - mainly Merinos.

Grown sheep marketed at Homebush are practically all Merinos; buyers, therefore, have little choice. Only occasionally are Crossbred sheep offered, but their excessive weight generally renders them a little difficult for operators to handle and they are mostly purchased by near country butchers who are able to cut these heavy carcasses in their trade.

/Lambs

Lambs - Down crosses favoured.

In the lamb section it is a well-known fact that the Southdown Cross produces a lamb of excellent shape and attractive appearance. The active competition which a pen of quality Southdown Cross lambs promotes leaves little doubt as to the preference of operators for this breed of lamb. Border Leicester Cross-bred Lambs, which are marketed in large numbers annually, are also very favourably regarded, but to a somewhat lesser extent than the Southdown Cross.

The Dorset Horn Cross Lambs and the Romney Marsh Cross Lambs also have their supporters, especially when they are in prime condition. Several other types of lambs are marketed, including the Corriedale Cross, Ryeland Cross, Shropshire and Suffolk Cross and may be said to be preferred in that order. Merino Lambs are also marketed but the carcass is not so good as that of the Cross-bred lamb from the butchers' viewpoint, Merinos being chiefly bred for wool production.

Pig section - cross breeds popular.

Pig sales at Homebush are relatively of lesser importance than either cattle or sheep, but this article would not be complete without comment on this phase of the general stock market.

The four principal breeds favoured by buyers are:- Berkshire, Tamworth, Middle White and Large White. For specific purposes, however, cross breeds are generally more sought after than the pure type. The trade may be said to be divided into four sections, viz., Local Pork, Export Pork, Local Bacon (light) and Export Bacon (heavy). The breeds in favour for each of these sections are as follow:-

Local Pork: Berkshire or its crosses.

The most sought for type in this section is probably the Berkshire - Tamworth cross.

Export Pork: White crosses.

For export purposes carcasses are required which show a clear white skin without the darker blemishes likely to be seen on types such as the Berkshire.

Local Bacon: Tamworth and Tamworth crosses.

Particularly the Tamworth - Berkshire cross.

Export Bacon: Pure Tamworth, Large White
and Large White crosses.

J.W., G.C. & A.T.

THE ANNUAL REPORT OF THE EGG MARKETING BOARD
- POOL YEAR ENDED 3rd JUNE, 1939 -

The Egg Marketing Board for the Counties of Cumberland and Northumberland and the Shires of Nattai and Wollondilly, New South Wales, has been the subject of a number of previous articles published in the "Monthly Marketing Review". The following summary of some of the special features of its operations for the Pool Year ended 3rd June, 1939, has been culled from the interesting and comprehensive Annual Report issued by the Board.

Production.

The production of eggs under the compulsory Pool during the year totalled 20,426,526 dozens, an increase of 84,779 dozens. Of these, 13,453,427 dozens or 65.86% were marketed through the Board floors and 6,973,099 dozens (34.14%) were sold by producer agents. It is pointed out that the disposals by producer agents have shown a continued increase, indicating the wide freedom given producers under the compulsory pooling as established by the Board and the steady and loyal support accorded to the Board by the industry.

The increase in production could reasonably have been expected to have been greater had not the poultry farming industry been so adversely affected by the heat wave and bush fires of January, 1939. Apart from the effect on production, peculiar marketing problems resulted which were reflected in the finances.

Disposals of Eggs.

Of the total production of eggs, 3,292,050 dozens or 16.12% were exported and 17,134,476 dozens (inclusive of sales by producer agents) or 83.88% were sold on the local market. The percentage of local market sales to total production is the highest ever recorded, while sales in quantity on the local market also reached a new high level, showing an increase of over 6% on the year.

With regard to receipts by the Board, 11,525,105 dozens were consigned to the Sydney floor and 1,928,322 dozens to the Newcastle floor, either direct or through depots. The Newcastle figure represented a continued increase and constituted a new high record. These receipts were disposed of as under:-

| | <u>Sydney Disposals</u> | | <u>Newcastle Disposals</u> | |
|------------------|-------------------------|-------------------|----------------------------|-------------------|
| | <u>Dozens</u> | <u>% of Total</u> | <u>Dozens</u> | <u>% of Total</u> |
| Sales and Sundry | | | | |
| Disposals ... | 7,041,114 | 59.48 | 689,485 | 42.66 |
| Exported ... | 2,789,940 | 23.57 | 502,110 | 31.07 |
| Cold Stored ... | 1,111,800 | 9.39 | 238,830 | 14.78 |
| Pulped ... | 798,397 | 6.74 | 185,751 | 11.49 |
| "Imperial Star" | | | | |
| Shipment ... | 96,000 | .82 | - | - |
| | <u>11,837,251</u> | <u>100.00</u> | <u>1,616,176</u> | <u>100.00</u> |

/of

Of the Newcastle receivals, 312,146 dozens were transferred to Sydney for disposal, which accounts for the differences between Receivals and Disposals.

Of the 10,161,377 dozens sold on the local market in shell or pulp form, distributing agents purchased 1,699,729 dozens, while the balance (83.27%) was sold by the Board's selling section.

Average Gross Price.

The average gross prices paid for all eggs received by the Board during the last three Pools were:-

| | | | |
|---------|-------|---------|------------|
| 1938-39 | | 1/3.569 | per dozen. |
| 1937-38 | | 1/4.14 | " " |
| 1936-37 | | 1/3.233 | " " |

It will be noted that there was an average decrease of .57ld per dozen during the past year as compared with the previous year but the Board points out the 1938-39 price has only been exceeded once in a complete Pool year, that is, in 1937-38.

On the other hand, the report states that steady feed costs throughout the year were of considerable assistance to the industry, as most producers experienced a reduction of approximately 20% in the costs of feed compared with the previous year.

Export.

The whole of the exports was consigned to and sold in the United Kingdom. The London season proved disappointing, as, although early shipments realised favourable prices and there was an indication of buoyancy in the market, several factors combined to bring about a decrease in price levels. Of such factors, special mention is made of the Czechoslovakian crisis of September, 1938, the comparatively mild English winter during late October and November, 1938, and serious complaints regarding the quality of eggs from another Australian State. Consequently, the realisations for the export season showed a decline. In addition to the lower realisations, local f.o.b. charges were higher, due to an increase in the cost of cases and packing material, while overseas charges also were heavier, principally owing to the greater use of cold storage on arrival in the United Kingdom.

The Export Account showed a loss of £25,698.5.10, whereas there was a profit of £1,455.4.3 in 1937-38.

Cold Storage.

1,350,630 dozens Eggs were placed in cold storage during the period December, 1938, to March, 1939. During November and December, 1938, the Board sold forward considerable quantities under contract, considering this preferable to selling eggs outright and allowing other interests to control the storage.

/The

The operations of the cold storage section were seriously affected by the heat wave of January, 1939, and repercussions arising therefrom, and it was found impossible to obtain the prices that had ruled during the previous year, so that stocks stored at cost prices of 1/9 to 2/- per dozen had to be disposed of at a loss.

Despite the reduction of storage charges from 1.6d to 1.26d per dozen, the Cold Storage Section showed a deficit of £12,438.5.10.

Egg Pulping.

Increasing wages resulted in increased costs for storage and pulp containers. In addition, the prices for egg pulp, which had been agreed upon by the Australian Pulp Stabilisation Committee, proved to be rather too high and, in common with all other States, the Board finished the year with a heavy surplus of unsold pulp, which had to be written down to the lower valuation set for 1939-40. A loss of £11,077.6.6 was sustained by this section.

In order to bring its pulp manufacturing methods up-to-date, the Board sent one of its members, Mr. R.C. Blake, to the United States of America to investigate methods there. Mr. Blake recommended the purchase of two machines, which have now been installed and enable the Board to prepare a much more satisfactory product, with very beneficial results on sales.

Pool Contribution.

It being evident that the 1d per dozen pool contribution would be insufficient to provide the equalisation funds required to offset the stabilisation costs of export, cold storage and pulping, the Board increased this contribution to 2d per dozen from 23rd January, 1939.

Balance Sheet and Accounts.

The Balance Sheet discloses a deficit for the year of £14,584.0.2, comprising the following details:-

| | £ | s. | d. |
|--|-----------------|-----------|----------|
| 1. Deficit on the normal trading operations of the Pool, including stabilisation activities. | 3,255. | 1. | 3 |
| 2. Provision for repayment of proportion of the 1933-1934 Pool deficit. .. | 3,140. | 0. | 0 |
| 3. Interest for the Pool year on the 1933-1934 deficit. | 588. | 18. | 11 |
| 4. Building Amortisation provision. | 7,600. | 0. | 0 |
| | <u>£14,584.</u> | <u>0.</u> | <u>2</u> |

/Note

Note by Editor.

A Pool Deficit really represents money over-advanced by the Board to the industry. The long-established practice of the Board is to pay producers the full Sydney market prices for all eggs delivered less selling commission and a deduction for equalisation of possible losses on cold storage, pulping and export. It sometimes happens that the deduction for equalisation is not sufficient, or, in other words, that world's parity in London, particularly, falls lower than usual: in these circumstances a deficit occurs which is carried forward to the next pool. On the other hand, it sometimes occurs that prices levels rise higher than usual and, in these circumstances, a Pool Surplus occurs. Over the years of the Board's operation, surpluses have aggregated substantially more than deficits as the following figures show:-

| <u>Pool</u> | <u>Deficiency</u> | | <u>Surplus</u> | |
|--|-------------------|-------|----------------|-------|
| | £ | s. d. | £ | s. d. |
| 1929-30 | 3,582. | 8. 0 | - | |
| 1930-31 | 4,748. | 12. 7 | - | |
| 1931-32 | - | | 35,741. | 17. 8 |
| 1932-33 | - | | 24,181. | 12. 8 |
| * 1933-34 | * 44,741. | 17. 7 | - | |
| 1934-35 | - | | 3,946. | 8. 11 |
| 1935-36 | - | | 22,242. | 11. 3 |
| 1936-37 | 13,568. | 13. 3 | - | |
| 1937-38 | - | | 30,803. | 7. 2 |
| 1938-39 | 14,584. | 0. 2 | - | |
| <hr/> | | | | |
| Aggregate:- | £81,225. | 11. 7 | £116,915. | 17. 8 |
| | | | 81,225. | 11. 7 |
| <hr/> | | | | |
| Net Surplus for period of Board's operation:- | | | £35,690. | 6. 1 |

* This particular deficit differs from the others inasmuch as, substantially, it represents revenue that was due from suppliers but not collected for a special reason. Its collection was subsequently spread over a period of years and approximately £29,000 has since been paid: actually, therefore, it could be treated as a deferred payment and removed from the above statement.

SHEEP AND CATTLE SALES AT HOMEBUSH, SYDNEY.

Reduced numbers forward for sale.

There was a falling-off in the numbers of sheep and lambs at the Homebush Saleyards during November in comparison with the heavy yardings of the previous month, the total being approximately 252,000 head. The main rush of the sucker lamb season is now over and while there is still quite a number yet to be marketed it is doubtful whether supplies will be as heavy as those experienced in October. During November there was a better showing of grown sheep, more being offered than was the case during October.

Industrial trouble at Abattoirs causes stoppage of sales.

During the greater part of 1939, there were no industrial disputes at the Homebush Abattoirs but, unfortunately, on Thursday, November 16th, trouble developed amongst the mutton slaughtermen and sales were not held until the following day (Friday, 17th), which was the last sale by auction during the month. Although only about 13,000 sheep and lambs were penned on Monday, 20th November, 1939, selling agents and buyers, after considering the situation which had arisen decided to postpone all auction sales of sheep and lambs indefinitely, or until such time as work was resumed by the slaughtermen. At a special meeting of the Sydney Fat Stock Salesmen's Association, members decided to arrange for a limited supply of sheep and lambs for Thursday, 30th November, the intention at the time being to sell by private treaty. Fortunately for all interests concerned, the dispute at the Abattoirs was settled, and agents thereupon decided to offer stock forward by auction. Some delay occurred due to a conference of agents and buyers, who would not operate until official confirmation of the strike settlement had been received. The Meat Industry Commissioner having intimated that killing would be resumed at the Abattoirs on Tuesday, 5th December, the first sale of sheep and lambs by auction since Friday, 17th November was held, 8,148 head of stock being offered.

Heavier yardings of sheep.

There was a much better representation of grown sheep during November, there being an increase in the numbers of both wethers and ewes. Good to prime heavy sheep again comprised by far the greater proportion of supplies with only a moderate showing of light trade descriptions. Very few woolly sheep were on offer.

Lower rates for heavy wethers.

Supplies of heavy mutton were somewhat large and as only a limited quantity can be placed through local trade channels, the bulk must necessarily be exported. Prices fixed by the United Kingdom Government for the purchase of surplus mutton generally were regarded by the trade as too low, and this coupled with the continued heavy supplies resulted in lower realisations. An indication of the trend in prices is given in a few actual sales:-

/Early

Early in November heavy wethers weighing 50 lb. sold at 13/2 each or the equivalent of 3d per lb. Later in the month, 56 lb. wethers realised the equivalent of 2½d per lb. A slight recovery in values was apparent about the middle of the month, when a line of nice quality wethers weighing 56 lb. made 16/2 per head or approximately 2⅝d per lb.

Rates for heavy sheep, however, during the month ranged from 2d to 3d per lb., realisations, of course, varying with the actual dressed weight of the carcass.

Rates for ewes and light weight wethers fairly steady.

The supply of light trade wethers and all classes of ewes was relatively light. Demand generally was good and although the market had an easier tendency towards the middle of November, the decline was not so pronounced as was the case with heavy wethers. A much weaker tone was apparent in respect of medium to plain light weight mutton over the closing stages of the auctions, a fall of from ¼d to ½d per lb. being noticeable. A few of the sales of light sheep are given below.

Good trade wethers weighing 44 lb. sold at 14/- each or the equivalent of 3½d per lb. Later in the period a line of 40 lb. wethers was secured for 3½d per lb. Light trade ewes weighing 36 lb. sold at 10/2 each or the equivalent of 3¼d per lb. Subsequently a draft of 36 lb. ewes was purchased for 10/2 per head or the equivalent of 3d per lb.

Viewed broadly, it could be said that wethers made from 12/- to 18/- each, ewes 10/- to 15/-, with a few lots of outstanding quality realising slightly higher prices. Light wethers sold at from 3d to 4d per lb., according to quality and ewes from 2d to 2½d per lb. for heavy and 2½d to 3½d for light. Average realisations throughout November were not quite so good as those of October, but there were only 4 sale days which could be regarded as truly reflecting values.

Falling-off in lamb numbers.

Viewed in the light of the previous month's heavy yardings, supplies of lambs were relatively small, approximately only a little over half of the total penning as against as much as 75% in October. For the present, at least, large consignments of lambs appear to be over and, while reasonable numbers are still to be marketed, it is not expected they will assume such large proportions as during the preceding months.

Shortage of light lambs.

The numbers of good quality light lambs and suckers available were by no means heavy; the supply, however, included quite a few of medium grades. In direct contrast was the offering of heavy lambs of which fairly large numbers were forward for sale. The quality of many of the heavy descriptions noticed left little to be desired.

/Reasonably

Reasonably steady market.

Realisations for good quality lambs and suckers generally were without much variation during the early part of the month but about mid-November prices advanced by 1/- per head. Following on the strike previously referred to, there was a sharp drop in prices of 2/- per head for good quality lambs and in places, more for the medium to plainer grades. This was brought about by the fact that buyers who normally have their stock slaughtered at the Homebush Abattoirs were faced with the necessity for making whatever arrangements they could for killing at the Riverstone Meat Works or by the Sydney Meat Preserving Co at Auburn; added handling costs and other factors, of course, were fully considered by buyers when making their bids. Apart from this, however, prices for the most part could be regarded as good, several outstanding lines of lambs making 27/- per head, while from 18/- to 25/- was a fair average of realisations for the better grades. Exceptionally light suckers and some of the plainer grades were disposed of at lower rates.

Representative sales during the period are given below and convey a good impression of the trend of the market.

Good quality Southdown cross-bred suckers weighing 36 lb. sold at 21/8 each or the equivalent of 6d per lb. Exceptionally good quality Dorset Horn cross-bred lambs weighing 45 lb. made the equivalent of 5³/₄d per lb; this line realised the very satisfactory price of 25/1 per head. A further instance was the sale of a draft of choice Southdown cross-bred suckers at 20/7 each; they weighed 32 lb. and made the equivalent of 6⁵/₄d per lb. On the same day 38 lb. shorn lambs realised 6¹/₄d per lb.

Prices for quality lambs on an average were better than during October, a gain of approximately ¹/₄d per lb. being apparent. Best suckers of weights ranging from 26 to 34 lb. sold at from 5³/₄d to 6⁵/₄d. Heavier types from 36 to 40 lb. at prices from 5³/₄d to 6¹/₄d and 40 lb. lamb and upward from 4³/₄d to 5³/₄d per lb.

Hoggets, of which only limited numbers were offered, realised from 3¹/₂d to 4¹/₄d per lb., according to weight and finish.

Apart from the period of depressed prices brought about by the industrial trouble, the realisations for sheep and lambs should be quite pleasing to the grazier.

Cattle supplies maintained.

As in the case of sheep, cattle marketing operations at Homebush were upset during the latter portion of the month because of the industrial dispute at the Homebush Abattoirs. The last regular sale was held on Monday, 20th November. On Thursday, 23rd November, a limited yarding was disposed of by private treaty and on the last day of the month about 570 head were auctioned during the afternoon. Prior to the cessation of normal selling activities,

/cattle

cattle continued to arrive in consistent numbers and the total for November was 20,081 head, including about 1,300 bulls and stores. As might be expected, this aggregate was somewhat less than that for October. Quality continued to be satisfactory. On most sale days good trade cattle predominated, whilst the percentage of prime sorts available was usually good. On one or two occasions, however, quality on the whole could only be described as fair and not up to the standard which could reasonably be expected in view of the seasonal conditions which continue to be very satisfactory over the greater part of the State, although certain areas in the North West and parts of the Coast are being affected by dry weather.

Consignments of bullocks decline.

Bullocks were well in evidence early in the month but later consignments showed a falling-off as regards numbers. Quality for the most part could be described as good trade with odd lots prime. Light weight descriptions predominated and heavy grades were usually to be seen in occasional lots only. Prices were very satisfactory and early in the period they showed an improvement on the previous month's levels, all classes realising to 35/- per 100 lb. dressed weight. Values subsequently declined slightly but prime grade was never lower than 33/- per 100 lb. It has been noted that since the outbreak of war heavy bullocks have frequently realised the same price per 100 lb. as the lighter weight animals. Early in the month a line of good quality Shorthorn bullocks weighing approximately 700 lb. sold at £12.5.0 per head, equivalent to 35/- per 100 lb., whilst later a pen of prime bullocks of the same breed from Gunnedah, weighing about 850 lb., sold at £14.1.0 per head, equivalent to 33/- per 100 lb.

Quality steers well supplied.

In contrast with bullocks, steers were well supplied. Quality generally was good and the percentage of prime lines offered was most satisfactory. Values were maintained at recent high levels and early in the period prime light sorts realised up to 37/- per 100 lb. Rates fluctuated subsequently but top prices were never lower than 35/-, whilst heavier descriptions of good trade quality ranged from 31/- to 33/- per 100 lb.

Variable offerings of cows.

Supplies of cows were variable, both as to numbers and quality. Generally, however, this class of cattle was well in evidence and of fair to good trade quality. On some occasions prime lots were fairly well supplied. Heavy sorts were mostly in evidence.

Considering the numbers offered, prices were very pleasing, especially for the heavy cattle which frequently brought as much per 100 lb. as the lighter descriptions. Early in the month prime cows sold to 32/- per 100 lb. The market eased subsequently but soon recovered and for the most part sales of good to prime sorts were effected at 28/- to 31/- per 100 lb.

/Supplies

Supplies of heifers limited.

Consignments of heifers were somewhat limited but quality on the whole was very satisfactory. Prime sorts were always in demand, although over-fat beasts were somewhat dull of sale. Early in the period prime light heifers sold to 35/- per 100 lb., whilst 36/- was realised later. Values fluctuated, however, and a fair proportion of the consignments changed hands at rates ranging from 29/- to 33/-.

Arrivals of vealers steady.

Vealers made a fair showing throughout the month and quality for the most part was good. Consignments comprised mostly medium to heavyweight descriptions. Prices fluctuated considerably, values of prime grade sorts varying between 40/- to 43/- per 100 lb.

Viewed as a whole, the market during November was a very satisfactory one as far as prices were concerned and existing conditions indicated that values will be maintained for the present.

G.C. & J.W.

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HONEY IMPORTS INTO THE UNITED KINGDOM.

The Agent General for New South Wales in London reports that the Board of Trade has announced that it is issuing an Open General Licence authorising, until further notice, the importation into the United Kingdom of honey if consigned from any part of the British Empire, except Palestine and Transjordan, whether imported before, on or after 14th November. Imports of honey may therefore now be effected without further licensing if consigned to the United Kingdom from a British Empire territory (except Palestine and Transjordan, for which individual licences are still required).

The Board of Trade also announces that no licences will be issued until further notice for the importation of honey from foreign countries.

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

Tasmanian potatoes in smaller supply.

Owing to the advanced stage of the season, receivals of Tasmanian potatoes in Sussex Street continued to decline during November. The smallest shipments for some considerable time came to hand and the quantity available for sale totalled only 6,584 bags. Early in the month, clearances of No.1 Grade Brownells were effected at £12, but prices rose sharply at the beginning of the next week to £20 per ton. However, the market subsequently settled down and, despite the smaller quantities received, rates for Brownells were steady at £12 per ton. The first shipment of the month from Tasmania contained some Snowflakes and No.2 Grade Brownells which were quoted at £11 and £6 per ton, respectively.

Heavy supplies of local tubers.

A feature was the increase in the weekly shipments of new potatoes from the Northern Rivers of New South Wales. A total of 24,515 bags was available and following the usual procedure, sales by auction were conducted on the wharf on various days during each week. The tubers generally were in fairly good condition but some showed signs of "wet rot" and "second growth", while a few instances of grub infestation were noticed. Prices fluctuated considerably, realisations ranging as follow:- New Grade £7 to £21.10.0, No.2 Grade £3 to £18.10.0 per ton (5/- to 8/- per bag), Chat Grade 2/- to 15/-, Stock Food 7/- to 8/- per bag

Very large consignments of local new potatoes were also received at the Alexandria Railway Goods Yard. The North Coast was the main source, supplies aggregating 40,197 bags. The first consignment for the season from Windsor, comprising 280 bags, came to hand, and it is expected that heavier quantities will be available very shortly. The auction sales attracted a representative number of buyers and agents reported that, on the whole, clearances were fairly satisfactory. Irregularity in demand was responsible for the wide range in realisations but towards the latter end of the month prices generally remained constant. Rates were as follow:- New Grade £6.10.0 to £20.6.8, No.2 Grade £3.10.0 to £18.0.0 per ton (small lots 3/- to 12/3 per bag), Chat Grade 2/6 to 13/8, Stock Food 8/- to 9/6 per bag.

Interstate consignments reach the Sydney market.

During the first week of November, 1,300 bags of new Factors were received in Sussex Street from Queensland. They were of mixed quality and choice lines were disposed of at £12 per ton, with medium and other grades at relatively lower prices. A shipment comprising 6,400 bags of new Delawares from Western Australia also came to hand. The offering showed occasional signs of "second growth" but most of the tubers were fairly good. This shipment reached the market when prices were high and deliveries were taken at £19 per ton, but agents reported sales at rates ranging to £12 per ton for

/stocks

stocks received later in the month.

At Alexandria, 375 bags of Queensland New Factors were on offer but these were ordered to be repicked. After reconditioning New Grade realised from £10.10.0 to £11, Second Growth Grade £9.10.0 per ton and Stock Food 3/3d per bag.

Lower prices continued to rule for onions.

At the beginning of November, a fairly good demand prevailed for onions but as the quantities received from local as well as Queensland growers increased, disposals were effected at comparatively lower rates. Realisations for local onions throughout the month were as follow:- White, at auction £4.5.0 to £11.10.0, by private treaty £5 to £10; Brown, at auction £8 to £8.11.8, private sales, £7.10.0 per ton. Portion of the Queensland supplies at Alexandria was sold by auction, Brown onions realising £6.10.0 to £9 and White £8 to £9 per ton. However, the majority of sales of onions from Queensland were made by private treaty at £8 to £11 for "whites" and £9.10.0 to £11 for the brown variety. Shipments of Queensland onions to Sussex Street during November totalled 5,819 bags of both Brown and White. The quality for the most part was good but again owing to heavy supplies, prices depreciated from £12 at the beginning of the month to £9 per ton at the close.

Steady inquiry for pumpkins.

Supplies of pumpkins on the Sydney market were derived mainly from Queensland districts and comprised 42 trucks by rail and 3,558 bags by sea. Some old season's stocks were included in early consignments but subsequently new season's crops only were in evidence. The consignments at Alexandria cleared well at prices ranging from £8.10.0 to £12 and £9 to £12 per ton was obtained for stocks in Sussex Street. Locally grown supplies at both markets were light and consisted of 129 bags shipped to Sussex Street and 71 bags at rail. Clearances were made by auction at £8 to £10.10.0 per ton.

Other vegetables lightly supplied.

The 118 bags of Tasmanian parsnips received during the month were of poor quality and consequently no rates were fixed. Sales were effected by private treaty and no prices were disclosed. No swedes or carrots came to hand from Tasmania as the season in that State is now over but it is anticipated that supplies of new season's swedes will be available some time in December.

Quiet demand for white chaff.

Oaten chaff on the Sydney market consisted of 166 trucks received at Alexandria from local sources. Occasional choice lines were noticeable but the bulk was of medium quality only. Buyers showed little inclination to purchase other than best lots, which

/realised

realised to £5.10.0 per ton. Other sales were recorded as follow:- Medium and inferior £2.15.0 to £4, good £4.5.0 to £4.15.0 per ton. Wheaten chaff to hand from various districts in New South Wales amounted to 39 trucks. Owing to the light supply, inquiry was slightly better than for the oaten variety at prices ranging from £2.10.0 to £5 per ton.

Deliveries of lucerne chaff were a little heavier, the total quantity available for sale amounting to 102 trucks. Some really choice lines sold readily but difficulty was experienced in clearing lower quality chaff. Sales were made at £3 for inferior to £6.15.0 per ton for choice.

Steady inquiry for lucerne hay.

A fairly steady inquiry was apparent for new green lucerne hay from Hunter River districts. Consignments to Alexandria comprised 54 trucks and sales were made at prices ranging from £2.10.0 to £3.15.0 per ton. Shipments of Hunter River lucerne hay to Sussex Street totalled 415 bales and, although good quality hay sold as low as £1.10.0 per ton, rates at times reached £3.10.0. Supplies of mature and partly dry hay from other centres within New South Wales consisted of 117 trucks. This offering met a quieter demand as compared with the Hunter River hay but any choice lines cleared well at from £5.5.0 to £6 per ton. It was noticed that "grassy" hay comprised portion of the yarding and sales were reported at £2 to £3, whilst medium to good lots brought from £3.10.0 to £5 per ton. A consignment of "derrick-pressed" hay from the Forbes district realised £3.10.0 per ton at auction.

A total of 39 trucks of oaten hay was received at Alexandria from local sources, a large percentage being consigned direct to a private firm. The balance was sold at £4 to £5 per ton.

Agents reported that a fairly good demand ruled for 1,501 bales of Tasmanian straw which were released on the Sussex Street wharves. The general range of values was £5 to £5.10.0, but early in each week, when choice lines were available, as high as £5.15.0 per ton was obtained. The 67 trucks which arrived at Alexandria from various country districts were of mixed quality and consequently a fairly wide range in prices was noted. Damaged lots realised from £2.10.0 to £3, medium to good £3.10.0 to £4.5.0, prime £4.10.0 to £4.15.0 per ton.

Firmer wheat market.

Arrivals of wheat at Alexandria totalled 40 trucks, as compared with 62 trucks received in October. Supplies generally were about equal to the demand. Towards the close of the month, the market was firmer and prices advanced. Sales by auction were effected at 2/7d to 3/2¹/₂d and by private treaty at 2/8d to 3/3d per bushel.

/Maize

Maize scarce.

The maize available at Alexandria consisted of 1,071 bags of local yellow and 1,519 of the same variety from Queensland. Disposals were steady at the following rates:- Private sales, Local Yellow 4/6 to 4/7, Queensland Yellow 4/5 to 4/8; At auction, Queensland Yellow 4/4 to 4/5½ per bushel. Steady clearances of the 753 bags of Yellow maize received from the Northern Rivers were effected at 4/6 to 4/7 per bushel. Supplies were a great deal lighter than during last month.

Most of the 41 trucks of oats which arrived at rail were offered for sale by auction. Quality was medium only and sales in the main were slow at prices ranging from 1/2 to 1/9 per bushel, according to quality.

A quiet request was also evident for the 9 trucks of barley in position, which realised from 2/- to 2/2 per bushel.

E.J.

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

During the period under review, the soft fruit season commenced in earnest and by the end of the month cherries, plums, apricots and peaches were available in considerable quantities. Trading throughout November was, on the whole, very satisfactory and clearances of quality fruit were readily effected.

Apples advance in price.

Usually at this time of the year retailers turn their attention more to summer fruits and reduce their purchases of apples to a minimum. This season was no exception but as supplies of apples were quickly diminishing values were not adversely affected. In fact, an upward movement in prices was evident, particularly in respect of choice New South Wales grown Delicious and Granny Smith, and special quality lots of these varieties realised to 24/- and 20/- per case, respectively. In most instances, the range of prices was considerably lower, nevertheless an increase of from 1/- to 2/- per case on the previous month's values was apparent.

Shipments from Tasmania varied from approximately 13,000 to 19,000 cases per week and moderate consignments were also received from Victoria. There was a steady inquiry for quality lines of interstate fruit and a gradual improvement in the market was noticeable. Demand was principally for small fruit of quality suitable for the 1/- per dozen retail trade. The high rates ruling allowed only a small margin of profit in most instances and this was another reason for the retailer reducing his purchases of apples.

/Only

Only limited quantities of pears available.

Practically the only pears available were limited quantities of Josephines from Victoria and vendors had little difficulty in disposing of stocks at enhanced prices.

Upward trend in values of Valencia oranges.

Valencia oranges were for the most part only moderately stocked. Prices fluctuated within narrow limits during the first half of the period but subsequently clearances were more readily effected and there was an upward movement in prices to the extent of 2/- per case. As values advanced, smaller fruit was more sought after and when rates reached their peak counts of 198 to 216 to the case were the subject of most inquiry.

Satisfactory rates for best cherries.

During the early part of the month the Young district was the main source of supply for cherries. Choice packs had ready sale and an upward trend in the price of the best descriptions was apparent. Later, considerably increased quantities were received from inland districts but values of choice lots were evenly maintained. "Unfaced" or "loose" packs were not popular and realisations were shillings per quarter case lower than for choice, faced packs in the orthodox case. Owing to the wet weather experienced in producing areas about the middle of the month, a large percentage of the fruit which arrived on the market opened in a rather bad condition and had to be disposed of as quickly as possible, even at low rates, to avoid wastage. A good demand, however, was maintained for choice lines and sales were effected at very satisfactory prices ranging in some instances to 8/- per quarter case for extra choice lots of mid-season varieties. These prices ruled throughout the balance of the period.

Choice apricots and peaches sell well.

The bulk of the apricots was received from near Metropolitan centres during the greater part of the month with small quantities from inland districts making their appearance towards the close of November. There was a good demand for choice, large fruit at prices ranging to 10/- per half-case but small or inferior descriptions were rather difficult to dispose of.

A small consignment of peaches (the first of the season) received about the 8th November realised up to 12/- per half-case. From then onwards supplies steadily increased but quality fruit continued to sell well and values were fairly steady. Demand for the most part centred on the larger sizes; small fruit, which was fairly plentiful, was rather slow of sale.

/Small

Small plums difficult to clear.

There was a good demand for choice, large plums, especially the Wilson variety, in a condition suitable for shipping and prices ranging to 10/- per half-case were obtained with odd sales of extra choice at higher rates. Substantial quantities of a small fruit were received and vendors had difficulty in effecting clearances, particularly as representatives of jam factories were not buying on the open market during the greater part of the period.

Passionfruit command high prices.

Passionfruit were very scarce early in November, supplies being almost exclusively from Queensland. Quality lots were in request and sales of special lines were recorded at as much as 24/- per half-case. Later, consignments from the North Coast augmented Queensland supplies but choice lines, although cheaper than at the beginning of the month, continued to command high prices.

Bananas heavily stocked.

Heavy supplies of bananas received from the North Coast were supplemented by consignments from Queensland. Prices during the first week were a little higher than those ruling at the end of October but clearances of choice continued steadily and values were fairly evenly maintained. Considerable quantities of ripe and inferior fruit were on offer at times but were disposed of satisfactorily without adversely affecting the market for the better quality descriptions.

Values of pineapples fluctuate.

November opened with only moderate supplies of pineapples on hand. A very sharp rise in prices was apparent on Monday, 6th November, the best packs making to 12/- per tropical case. Later, however, heavy consignments came to hand and sellers were obliged to accept lower rates to facilitate clearances. Towards the end of the month only relatively small quantities were available and rates advanced sharply by from 3/- to 4/- per tropical case and the upward trend in values continued throughout the remainder of the month, closing quotations being from 10/- to 15/- per tropical case.

Variable market for tomatoes.

An outstanding feature of the vegetable market during the first half of the month was the exceptionally heavy supply of tomatoes and the consequent slump in prices. Consignments totalling up to 28,000 half-cases were received from Queensland during the first two weeks in addition to fairly large quantities from the North Coast of this State and heavy supplies from local glass houses.

/Rates

Rates fell sharply, in some instances the decline being as much as 5/- per half-case; vendors were obliged to progressively reduce prices in order to stimulate sales and towards the middle of the month values had receded to relatively low levels. Later in the period, only comparatively small consignments were received from Queensland owing to the devastation of crops by severe hail storms. Fairly large supplies came to hand from the North Coast and local sources but the advent of warmer weather was more favourable to sales with the result that clearances were more readily effected and a steady improvement in prices was evident. An advance of from 3/- to 5/- per half-case was apparent from the middle to the end of the month.

Peas cheaper.

Peas were heavily stocked, supplies being considerably in excess of ordinary requirements, and prices fell steadily. Surplus stocks, however, were purchased on behalf of canneries and this prevented values falling to extremely low levels.

Beans - Supplies and values fluctuate.

There were considerable fluctuations in both supplies and values of beans. The period opened with choice selling readily at prices ranging to 8/- and occasionally 9/- per bushel. Towards the end of the first week of November, however, heavy supplies came to hand and prices fell by 2/- to 3/-. Only relatively small quantities were available at the beginning of the second week and sales were effected at enhanced prices. Later in the same period, however, owing to more plentiful stocks, a falling-off in the general quality and a weaker demand, values receded to former levels. Consignments were fairly heavy during the balance of the month and, as inquiry was somewhat limited, vendors found it more difficult to effect clearances and a steady weakening in values was apparent.

Lettuce heavily stocked.

Lettuce supplies were exceptionally heavy, particularly during the first half of the month, and prices remained comparatively low.

Cabbages fairly plentiful.

During the early part of the month supplies of cabbages were very substantial; sales were quiet and lower prices were accepted to facilitate clearances. At the end of the second week, however, an improved inquiry resulted in an upward movement in values. The market received a slight setback during the following week but towards the end of the month the new season's crop from the Moss Vale district commenced to come forward and quality lines cleared steadily at prices ranging to 5/-, with odd sales to 6/- per dozen.

E.J.C.

WHOLESALE PRICES OF VARIOUS COMMODITIES IN
SYDNEY (N.S.W.) DURING NOVEMBER, 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 November, 1939:-

| <u>Commodity</u> | <u>From</u> | <u>To</u> |
|---------------------------|---------------------------------|---|
| Wheat: | | |
| Bulk (1938/39) | 2/8d | 2/10d per bushel. |
| Bagged (1938/39) | 2/10d | 3/- " " |
| Bulk (1939/40) | 2/9d | 2/10d " " |
| Bagged (1939/40) | 2/11d | 3/- " " |
| Flour | £8.2.6 (plus £4.12.6 tax) | £8.12.9 per ton (plus £4.2.3 tax) |
| Bran | £3.15.0 per ton) | No variation. |
| Pollard | £3.15.0 " ") | |
| Eggs (Hen) - | 1/- per dozen | (no variation). |
| Butter: | | |
| Choice | 161/2d per cwt.) | no variation. |
| First Quality | 156/6d " ") | |
| Second Quality | 151/10d " ") | |
| Cheese: | | |
| Loaf | 11d per lb.) | no variation. |
| Large | 10½d " ") | |
| Special Brands | 1/- to 1/1 " ") | |
| Pigs (Abattoir Sales) | | |
| Prime extra light porkers | 29/6d | 42/6d per head. |
| " light porkers | 38/6d | 47/6d " " |
| " med.wgt. " | 43/6d | 57/6d " " |
| " heavy " | 53/6d | 62/6d " " |
| " baconers | 65/6d | 89/6d " " |
| Backfatters | £4.10.0 | £9.0.0 " " |

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

FRUIT

| STATE | Pine-apples cases | Bananas trop.cs. | Other Fruit cases | Tomatoes half-bush cases | Melons crates | TOTALS packages |
|------------|----------------------|---------------------|-------------------------|--------------------------------|------------------|--------------------|
| Queensland | 42,338 | 10,462 | 6,479 ^x | 73,657 | 54 | 132,990 |
| Victoria | 2 | 101 | 13,491 | 1,272 | - | 14,866 |
| Tasmania | - | - | 98,578 | - | - | 98,578 |
| Sth. Aust. | - | - | 2,213 | - | - | 2,213 |
| West Aust. | - | - | 1,350 | 208 | - | 1,558 |
| TOTALS: | 42,340 | 10,563 | 122,111 | 75,137 | 54 | 250,205 |

x Also 364 trays Strawberries.

VEGETABLES.

| STATE | Potatoes | Onions | Swedes | Pumpkins | | Cucs. & Chillies | Other Veggies. | | TOTALS | |
|------------|----------|--------|--------|----------|--------------------|---------------------|----------------|------------------|---------|--------------------|
| | Bags | Bags | Bags | Bags | Tons | cases | Pkges. | Tons | Pkges. | Tons |
| Queensland | 8,776 | 7,276 | 19 | 11,452 | 1387 $\frac{3}{4}$ | 6,410 | 9,740 | 16 $\frac{1}{2}$ | 43,673 | 1404 $\frac{1}{4}$ |
| Victoria | 7,436 | 1,844 | 99 | - | - | - | 1,927 | - | 11,306 | - |
| Tasmania | 66,506 | - | 889 | - | - | - | 567 | - | 67,962 | - |
| Sth. Aust. | 295 | 220 | - | - | - | - | 9,498 | - | 10,013 | - |
| West Aust. | 2,344 | - | - | - | - | - | - | - | 2,344 | - |
| TOTALS: | 85,357 | 9,340 | 1,007 | 11,452 | 1387 $\frac{3}{4}$ | 6,410 | 21,732 | 16 $\frac{1}{2}$ | 135,298 | 1404 $\frac{1}{4}$ |