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NEW SOUTH WALES
DIVISION OF MARKETING
DEPARTMENT OF AGRICULTURE

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MONTHLY
MARKETING
REVIEW



DECEMBER, 1940.

Vol. 6, No. 4.

ISSUED BY AUTHORITY OF THE MINISTER FOR AGRICULTURE
PREPARED UNDER THE DIRECTION OF THE
CHIEF, DIVISION OF MARKETING,
SYDNEY

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 CHIEF OF
THE DIVISION OF MARKETING, DEPARTMENT OF AGRICULTURE,
NEW SOUTH WALES, AUSTRALIA.

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HIGHLIGHTS.

Commencing at the close of November, a tropical storm resulted in the best rains for some considerable time being received over a wide area of New South Wales. The heaviest falls were recorded along the Coast, although many inland centres reported appreciable amounts. Market gardeners, orchardists and dairy farmers particularly should benefit.

Commonwealth Government's guaranteed minimum price to wheatgrowers increased from 3/6d per bushel f.o.r. ports to 3/10d f.o.b. ports for bagged wheat; the guarantee will apply to a maximum marketed crop of 140,000,000 bushels and will become operative from the 1941/42 crop.

Owing to the necessity for reserving available space for vital commodities the export of canned fruits to United Kingdom is unlikely for some time. It is announced that the Commonwealth Government will accept responsibility up to £800,000 to permit of processing 1940/41 Australian crop of canned fruits.

An announcement has been made that the Commonwealth Government will acquire next season's entire apple and pear crops, valued at £3,000,000.

It is reported that Commonwealth Prices Commissioner has decided that, following a reduction in cost of imported raw materials, the prices of jute goods will be reduced as from 13th December, 1940. The reductions will amount to 1¼d per lb. in the basic prices of jute rope and cordage and 1d per lb. in the trade prices of jute shop and sewing twine. A reduction of 1d per lb. in the basic prices of jute yarn and jute twist is also to be made.

The Egg Marketing Board of New South Wales is now placing supplies of dehydrated egg albumen (dried egg-white) on the market. These take the place of the imported article and are of the highest quality.

PHYSICAL FEATURES, PRODUCTION AND GENERAL DESCRIPTION
OF THE NORTH CENTRAL PLAIN STATISTICAL DIVISION NO.11,
NEW SOUTH WALES.

In the series of articles describing the individual statistical divisions of New South Wales we have so far dealt with the Coastal, Tableland and Slope sections. The remaining divisions comprise the Plains portion of the State and are divided into the North Central Plain (No.11), Central Plain (No.12), Riverina (No.13) and the Western (No.14). The Riverina will be described in two parts - "Riverina, exclusive of the Murrumbidgee Irrigation Area" and "The Murrumbidgee Irrigation Area".

The Central Plains and Riverina divisions, which have an average width of about 120 miles, constitute the eastern section of a remarkable extent of, for the most part, practically level country which stretches from the western edge of the Slopes to the western boundary of New South Wales. It is now proposed to say something of the physical features and production of the North Central Plain or Statistical Division No.11.

Historical

In the early days of the colony of New South Wales settlement was confined within the boundaries of the County of Cumberland, but during the term of Governor Macquarie livestock numbers increased so rapidly that it became imperative to seek additional pastures. The spread of settlement was at first restricted to accessible coastal lands with Sydney as centre, but in 1813 a way over the Blue Mountains was discovered by the intrepid Blaxland, Wentworth and Lawson. This was followed by the building of a trafficable road over the route taken by these explorers, thus providing for the movement of settlers to the hinterland of the State. A number of exploring expeditions progressively revealed the possibilities of the inland regions and in 1827 Alan Cunningham, on his northward trip from the vicinity of Bathurst to Moreton Bay, passed through some of the country now included in the North Central Plain division.

At first, the spread of settlement was restricted by the smallness of the colony's population though greatly facilitated, one imagines, by the absence of fierce and war-like tribes of aborigines of the type that hampered the spread of white settlement in North America and by the absence of predatory animals. By the year 1830, however, only 42 years from the foundation of the colony in 1788, the area of settlement extended up to 200 miles from Sydney. After 1828 the population, which then totalled 36,598, increased rapidly and its growth was furthered by a system of assisted immigration. A heavy influx of people followed the discovery of gold in 1851 and at the census of 1861 the population of New South Wales (from which Victoria had been separated in 1851 and Queensland in 1859) was 357,978. After the first unsettling effects of the gold rushes had worn off, many men turned their attention to primary pursuits /and

and the real era of rural development began, especially the expansion of the pastoral industry. Graziers pushed further and further afield in search of fresh pastures and it was in this manner that the North Central Plain, with extensive areas suited to sheep, was opened up. By 1884 the population of New South Wales had increased to 904,980 and much of the State was occupied by pastoral holdings of varying size. More than 35,000,000 acres had been alienated - of which 28,000,000 acres had been sold between 1861 and 1884 - and a large proportion of the remaining area of the State suitable for occupation was leased for varying periods. The North Central Plain division as a whole has been settled for many years and will always be remembered for its prominence in the expansion of the sheep and wool industry.

Boundaries, physical features and soils.

The division under discussion is situated in a north-westerly direction from Sydney. In the north it adjoins the sister State of Queensland, the dividing line being the McIntyre River from a point slightly east of Boggabilla to Mungindi. From Mungindi the western boundary follows the Barwon River approximately to where it is joined by the Gwydir River - some little distance north-west of the township of Pokataroo - and then swings first to the east and then to the south, passing close by Pilliga, until it reaches the most southerly point of the division, slightly to the north-west of Merrygoen. The southern boundary extends from this point in an easterly direction, and passes just south of Binnaway and over the Warrumbungle Ranges, terminating a short distance south-west of Bundella. From here the eastern boundary proceeds in a mostly northerly direction to the west of Tambar Springs, Mullaly, Gulligal and Gravesend to point of commencement.

Although over a large area of the division level or plain country is met with, undulating to hilly and even mountainous patches are encountered, and in the southern portion the Warrumbungle Ranges attain an altitude varying between 3,000 and 4,000 feet. The average altitude of the plain or level country is about 700 feet.

Most of the northern and western plain country is heavy black soil. Areas consisting of red to chocolate loams occur on the eastern side of the line from Moree to Narrabri. On the fringe of the Pilliga scrub to the west of Narrabri, and in parts of the Wee Waa district are to be found light sandy soils as well as greyish loams. In the Coonabarabran locality the country is of sandstone and basalt formation, with a reddish sandy loam and clay soils on the ridges, while many patches of raw sand and black-soil plains occur to the east and west.

Area, holdings and population.

Figures published in the New South Wales Statistical Register show that the North Central Plain embraces 4 Shires and 2 Municipalities, and aggregates 9,579,406 acres (or approximately

/14,968

14,968 square miles). At the 30th June, 1939, there were 1,928 holdings of one acre and upwards with a total area of 7,776,000 acres, of which 5,648,000 acres were alienated or virtually alienated lands, and the remainder unalienated Crown lands. Of the holdings mentioned, 1,742,000 acres were regarded as suitable for cultivation. During the year 1938/39 a total of 356,000 acres was under crop, 36,000 acres were sown to grasses, 67,000 acres of fallow were ploughed and worked, while an additional 32,000 acres of new lands were prepared by clearing and made ready for ploughing.

Taking into consideration the natural increases as well as allowing for decreases since the 1933 census, the Government Statistician estimated that at the 31st December, 1939, the total population of the division was 32,010 persons, the figures for the various Municipalities and Shires being:-

Municipality -	Moree	4,880	people
	Narrabri	3,390	"
Shire -	Booolooroo	3,640	"
	Boomi	3,280	"
	Coonabarabran	7,320	"
	Namoi	9,500	"

Climate and rainfall.

Much of the North Central Plain division experiences fairly high temperatures during the summer months but the humidity is not nearly so high as in that part of New South Wales adjacent to the coast; the winters are described as mild, with occasional heavy frosts. Over most of the division the mean annual temperature is approximately 68° while the mean summer and winter temperatures are 80° and 53°, respectively; however, in mid-summer temperatures of over 100° are experienced. The more elevated areas of the Warrumbungle Ranges have a considerably cooler climate. The average rainfall is by no means high and its intermittency is a source of worry to the grazier; generally speaking, the heaviest recordings are during the summer months and the annual average ranges from approximately 19 inches at Mungindi in the north-west to almost 28 inches at Coonabarabran in the southern portion. Subterranean waters, however, underlie a considerable area of this particular division, and artesian bores supply permanent water in many places and are of great practical utility to those engaged in pastoral pursuits.

Sheep and wool principal sources of rural prosperity.

The North Central Plain is well suited to the production of sheep and wool and usually carries the seventh largest number of sheep in the Statistical Divisions of New South Wales. The readiness with which feed, more especially herbage, responds to rain tends to offset the uncertainty of the precipitation. Grazing, with mixed farming and agriculture, prevails in this division, as

943 holdings are utilised for grazing only, 884 for agriculture and grazing, 59 for agriculture only, and 42 for other purposes; sheep-raising is the principal pastoral pursuit. Statistics show that on the 31st March, 1939, a total of 4,483,166 head of sheep and lambs were depastured in the North Central Plain or about 9% of the total for New South Wales. Although some excellent fat lambs are produced, it is generally recognised that the section as a whole is not capable of a large output whilst the rail distances from Homebush and other markets militate against any great expansion of this phase of the sheep industry. At the same time large numbers of lambs are raised for other purposes. During the year ended 31st March, 1939, 1,949,000 ewes were mated, from which 1,174,000 lambs were marked or a percentage of 60.2%, while the percentage lamb drop for the entire State was 52.6%; that season, however, was an adverse one for the State as a whole, particularly in the Western Division, Riverina, Central Western Slope, Central Plain and South Western Slope. The number of sheep depastured per square mile of country is not so high as in the Western Slopes and Tablelands divisions; according to the New South Wales Year Book the figure for the year 1939 was 215.5 head of sheep to the square mile in the Central Plains and Riverina, wherein the North Central Plain division lies, as against 352.2 in the Western Slopes and 300.2 in the Tablelands. This represents a decline over the past 48 years, as in 1891 the Central Plains and Riverina carried 352 head of sheep per square mile; it is said that this decrease is largely the result of the devotion of substantial areas to agricultural pursuits. The average wool clip in the division for the year 1938/39 was 8.26 lbs. per head for sheep and 3.77 lbs. per head for lambs, giving an aggregate total production of 32,640,682 lb. of greasy wool, valued at £1,400,830, a very useful contribution to the national wealth.

Cattle, dairying and pigs

Although cattle-raising is not as extensive as in some other divisions, nevertheless it contributes fairly substantially towards the rural wealth of the community; for the year ended 31st March, 1939, the cattle carried numbered 80,521 head, inclusive of 896 cows in registered dairies. It will be seen from these figures that dairying is of very minor importance. It is only practised in the vicinity of the larger towns for local milk supply. Most of the cattle are of beef breeds, and are either utilised for meat for local consumption or forwarded to Homebush for sale as fat stock for the home and export markets.

Statistics show that the number of pigs as at the 31st March, 1939, was 1,660 head, a small total compared with those of the other parts of New South Wales already dealt with. Owing to the distance from Sydney, very few would be consigned to that centre and most would be sold locally for slaughter and consumed as pork. In certain parts of the division wild pigs are found. From time to time these are captured and sent to various markets, but this phase of production cannot be regarded as having any great commercial value, other than as offering opportunities for wild pig hunting as a sport and a tourist attraction.

(to be continued)

MARKETING LEGISLATION AND SCHEMES

PROVINCE OF BRITISH COLUMBIA, CANADA.

Following on contacts made by the Chief of the Division of Marketing (Mr. A.A. Watson) during a visit to Canada in 1935, information relative to marketing of primary products in the Province of British Columbia has been furnished from time to time by Dr. Wallace R. Gunn, B.S.A., B.V.S., Livestock Commissioner, B.C. Department of Agriculture, and Mr. J.E. Lane, Chairman, B.C. Marketing Board.

Natural Products (British Columbia) Marketing Act, 1934.

Subsequent to the passing of the Natural Products Marketing Act of Canada in 1934 a number of marketing schemes was put into operation, including those for which supplementary provincial legislation was necessary. The Province of British Columbia was outstanding in this regard, and the Natural Products (British Columbia) Marketing Act was passed the same year. The Dominion legislation, however, operated for but a comparatively short period, being declared invalid by the Supreme Court of Canada. In brief, the judiciary held the view that it was beyond the jurisdiction of the Dominion Parliament to legislate on matters which, in substance, related to local and provincial matters. The Privy Council, in judgment delivered on 28th January, 1937, concurred with the view of the Supreme Court. Since these decisions, the Provincial Governments have either amended acts already in existence to bring them into line with the Court's judgment, or brought into being new enactments designed for the purpose of controlling the marketing of primary products within the Provinces concerned.

The Act (Natural Products Marketing (British Columbia) Act Amendment Act, 1936) as it now stands is very similar to the Ontario Farm Products Control Act, the principal features of which were referred to in the April, 1940, issue of the "Monthly Marketing Review". The main point on which the two Acts differ is that in the Ontario Act the initiative for the establishment of a marketing scheme rests with the producers, whereas the British Columbia Act reserves the initiative to the Lieutenant-Governor in Council. Sub-section (2) of Section 4 of the British Columbia Act, as amended, states (inter alia) - "The Lieutenant-Governor in Council may from time to time establish, amend, and revoke schemes for the control and regulation within the Province of the transportation, packing, storage, and marketing of any natural products, and may constitute marketing boards to administer such schemes."

As was explained in the March, 1938, issue of the "Monthly Marketing Review", the Boards set up under the British Columbia Act have not, as a general rule, exclusive authority to market a commodity; rather have they the power to designate agencies to undertake the duties of marketing. The purposes, as set forth in the Act, are, in general, to provide for the effective regulation

/and

and control of the transportation, packing, storing or marketing of the product within the area defined. However, one scheme - the Salt Fish Marketing Scheme - does impose on the Board the actual duty of marketing.

Marketing Schemes Instituted

<u>Scheme</u>	<u>Date put into operation</u>
Hothouse Tomatoes and Hothouse Cucumbers Marketing Scheme	22nd July, 1936.
Lower Mainland of B.C. Milk Marketing Scheme	27th October, 1936 (Amended 31st March, 1939).
B.C. Coast Vegetable Marketing Scheme	16th December, 1936.
B.C. Interior Vegetable Marketing Scheme	18th December, 1936 (Amended 14th March, 1939).
Tree Fruit Marketing Scheme	20th January, 1937.
Halibut Marketing Scheme	19th March, 1937.
Salt Fish Marketing Scheme	25th August, 1937.

Plebiscites were taken towards the end of 1938 and early in 1939 on the question of the continuance of the first four of these schemes. Voting was in favour of the continuance of all the schemes except that dealing with Tomatoes and Cucumbers; this was discontinued at once. The adverse vote in this case resulted from a variety of causes, the most important of which was said to be suspicion on the part of the Chinese producers that the real purpose of the scheme was to limit their control of the industry and increase that of the white producers; a unique feature of this scheme was the provision for separate representation of Chinese producers on the Board.

Powers and Functions of Boards.

Powers delegated to the Boards set up under the various schemes include:- compulsory sale through agencies chosen by the Board, power to fix maximum and minimum prices, control of transport, and licensing of persons engaged in production, processing, manufacture or marketing of the product. The Coast and Interior Vegetable Schemes empower their Boards, in addition to the above, to determine the "spread" which dealers shall add to the price, and to promote the vegetable industry by publicity or otherwise.

As mentioned above, the Salt Fish Scheme provides for the marketing of the product by the Board. It operates under conditions similar to those obtaining under the New South Wales Marketing of Primary Products Act. The Board has power, amongst other things, to sell, or otherwise dispose of, place in storage, or arrange for the storage of the product, and regulate the quantity to be received from producers or to be placed on the market.

LIVESTOCK AUCTIONS AT HOMEBUSH, SYDNEY.

PROLONGED DRY SPELL HAS DETRIMENTAL EFFECT
ON QUALITY OF YARDINGS.

Heavy supplies of sheep and lambs.

Although in places light to moderate falls had afforded some relief, there was little improvement in the drought position throughout New South Wales until the closing days of November, when a tropical rainstorm, which was effective into the first week of December, resulted in substantial rains along the coast and good falls in many inland centres. In many districts conditions were bad and graziers were forced to consign heavily to the stock markets. During November supplies at the Homebush Saleyards were heavy and on two occasions the aggregate daily penning exceeded 63,000, while the smallest daily total was 37,200 head. For the month the large total of 412,215 head of sheep and lambs was marketed or 26,956 more than for the previous month. With eight selling days in the period, this represents an average yarding of 51,527 head on each sale day. During the corresponding period of 1939 sales were disorganised by an industrial dispute, but, after making due allowance for the period in which sales were not held, the yardings for the current year were substantially heavier.

Quality reflects seasonal conditions.

Seasonal conditions were truly reflected in the quality of many lines of sheep submitted, some extremely plain lots being noticed. Aged and wasted ewes and wethers were offered in fairly large numbers but before the close of the month there was definite decline in the consignments of very plain sheep, particularly ewes. Medium trade sheep were fairly well supplied throughout, while there was quite a fair showing of good light to heavy mutton. It could be said that about mid-November the general quality of the yardings improved slightly. Extra heavy sheep dressing 60 lb. of mutton and upwards were again scarce, but some very attractive lots were available. Shorn sheep were plentiful, only odd drafts of woolly sorts being included.

In October 136,044 head of sheep were offered while the November figure was 169,415, which indicated how the adverse season had forced plain sheep on to the market.

Restricted demand for plain lines.

Owing to the export restrictions on third quality wethers and most lines of ewes, demand for this class of mutton was restricted, and, with large numbers offering, agents found it very difficult to effect sales at reasonable prices, so that many lots were disposed of very cheaply. Good quality wethers, however, for the most part sold well, although average realisations were

/somewhat

somewhat below those for the previous month. Some variation occurred throughout the period, supplies mostly being in excess of buyers' requirements, and at the end of November rates for mutton generally were $\frac{1}{2}$ d per lb. below those ruling at the opening auctions.

An indication of market trends is given by the following sales during the period:-

Early in November a draft of good trade shorn wethers weighing about 44 lb. sold at 12/5 each, equivalent to $3\frac{1}{2}$ d per lb., and nice quality shorn ewes, dressing approximately 38 lb. were disposed of at 10/1 per head, or 3d per lb. Following the heavy yardings about mid-November and a restricted demand, operators obtained 46 lb. shorn wethers for the equivalent of $2\frac{1}{2}$ d per lb., paying 10/2 per head, while fair to good trade shorn ewes weighing approximately 44 lb., sold at 7/9 each and cost 2d per lb. Improved prices were secured subsequently, and a draft of shorn wethers, dressing about 45 lb., realised 11/11 each or 3d per lb., while 36 lb. shorn ewes made 8/- per head, equivalent to $2\frac{1}{2}$ d per lb.

Only occasional pens of woolled sheep were offered and some fine big framed merino wethers brought 25/- each, while others realised from 21/- to 25/-; ewes carrying about 9 months wool made 17/- per head. Shorn wethers sold to 18/- each but most of the better grades were disposed of at from 11/- to 16/- per head, while shorn ewes mostly made from 8/- to 11/-. Medium quality wethers and ewes were obtained at from 4/- to 8/- and some of the exceptionally plain descriptions only realised from 6d to 3/- each.

At the opening sales held in November best light wether mutton was worth $3\frac{1}{2}$ d and heavy brought 3d per lb., while ewe mutton cost $2\frac{1}{2}$ d for heavy and 3d per lb. for light. Following the heavier yardings and reduced prices the carcass values were appreciably lower by the end of the month. Average costs for the period were from $2\frac{1}{2}$ d to $2\frac{3}{4}$ d for heavy and $2\frac{3}{4}$ d to 3d for light wethers, with ewes ranging from 1 $\frac{1}{2}$ d to 2d and 2d to $2\frac{3}{4}$ d per lb. for heavy and light sorts respectively.

Smaller yarding of lambs.

There was a further decline in the pinnings of lambs during November, a total of 242,800 head being received or some 7,000 less than the aggregate for the previous month. The offering of good to prime suckers showed a marked decline, while choice heavy types of lamb were difficult to secure. Nevertheless, some very attractive lots were received from more favoured centres and from holdings where extensive pasture improvement had been carried out. Plain to medium trade lambs, all showing effects of the protracted dry spell, constituted the major portion of the yardings.

/Quality

Quality lambs sell well.

An active demand for good to prime lambs and suckers prevailed throughout November, and, in the main, prices did not vary to any appreciable extent, realisations on the whole comparing favourably with the previous month's averages. Medium to plain lambs, however, did not meet such a good request, many lines being hard to sell and then only at relatively low rates.

The following are examples of actual sales recorded:-

At the opening auctions of the period 34 lb. suckers of good finish sold at 21/11 each and made 6 $\frac{1}{2}$ d per lb., while good heavy lambs, weighing 44 lb., realised 26/4 per head or 5 $\frac{1}{2}$ d per lb. Towards the end of November a draft of good quality suckers, weighing approximately 32 lb., was disposed of at 21/4 each, equivalent to 6 $\frac{1}{2}$ d per lb., while a line of good heavy shorn lambs of 38 lb. weight cost 6d per lb., and brought 20/3 per head.

Some of the best lambs penned made as much as 27/- each and odd lines brought 26/-; generally, however, realisations ranged from 18/- to 24/-, according to weight and finish. Medium to plain lambs cost from 3/- to 15/- per head according to quality and were generally dull of sale.

Best light suckers made to 6 $\frac{1}{2}$ d per lb., but chiefly were secured at from 6d to 6 $\frac{1}{2}$ d for light and 5 $\frac{1}{2}$ d to 6d per lb. for heavy. Medium trade sorts cost from 5d to 5 $\frac{1}{2}$ d per lb. and the plainer grades sold at relatively lower rates.

Taking into consideration the heavy supplies and the large percentage of plain to medium quality offering, realisations compared favourably with the previous month's averages.

Cattle supplies show small increase.

Towards the close of November, 1940, numbers of cattle arriving commenced to increase and the aggregate for the period - 14,240 head - was a little larger than that of the previous month. In the store section 1,266 were auctioned. During the corresponding period of 1939, when seasonal conditions were fairly satisfactory, the yarding totalled 20,081 head. From a pastoral point of view the position had continued to deteriorate and in many districts a critical stage had been reached; rains received at the close of November and extending into the first week of December should improve the outlook in many centres.

The quality of the offerings was again very disappointing, although some improvement was noticed towards the close of November. Mostly the consignments were of a very mixed character, and it was the exception rather than the rule to see evenly graded drafts. Despite the generally poor quality of the animals

/available

available, it was pleasing to note that some of the more favoured holdings were still able to market cattle in a very satisfactory condition.

Bullocks very scarce.

Only very limited numbers of bullocks were available, as, unlike the preceding month, no supplies arrived from Queensland to augment consignments from New South Wales sources. Prime bullocks were especially scarce and, for the most part, the pennings comprised fair to good trade types of lightweight description. On the first sale day good to prime light bullocks were quoted at 42/- to 47/- per 100 lb. Subsequently, values fluctuated somewhat, but were mostly higher, and on the final sale day prices rose considerably and were only slightly below the peak recorded in early October. Closing quotations were:- Heavy 42/- to 46/-, medium 45/- to 49/-, and lightweight 46/- to 51/- per 100 lb. It is hardly necessary to point out that only a small percentage of the consignments sold at these enhanced rates.

Values of steers maintained.

Steers were moderately supplied throughout but on the whole quality was far from satisfactory and, for the most part, only odd lots of prime animals were obtainable. On the final sale day, however, the percentage of good to prime drafts was much higher than the average throughout the month. As was to be expected, quality steers were in keen demand and prices, although they varied somewhat, remained at a fairly high level. At the closing auction, good to prime steers were quoted at 47/- to 53/- per 100 lb., but the average rates for the month were about 46/- to 51/6.

Plain cows well supplied.

Cows were again plentiful, and all grades of weight and quality were represented. Generally, however, the bulk of the consignments comprised plain and medium descriptions, and only odd lots of good trade to prime grade were available. As with other classes of beef, values fluctuated throughout the period, and were lowest in the middle of the month, when quotations for good to prime quality were:- Heavy 36/- to 40/-, light 39/- to 41/- per 100 lb. By the end of November, prices had risen 3/- per 100 lb.

Few prime heifers.

Except towards the close of the month, the consignments of heifers were very unsatisfactory and generally consisted of small animals of plain to medium quality; the limited proportion of prime beasts was mostly of heavyweight description. Quotations for good to prime heifers of all grades of weight ranged from 40/- to 47/- during the early part of the month but values subsequently advanced and prime lightweights sold to 51/- per 100 lb.; closing rates were 43/- to 49/-.

/Variable

Variable pennings of vealers.

The moderate numbers of vealers forward on most sale days included animals of all grades of weight and quality. Plain and medium sorts predominated, however, and generally the prime grade animals were to be found amongst the medium and heavy weights only. While values of vealers were steadier than those of other classes, some variation was recorded. On the second sale day quotations for good to prime vealers were 56/- to 61/- per 100 lb., but for the remainder of November rates ranged from 53/- to 57/-.

Cattle market closes firmer.

During the previous month cattle values reached peak levels, then declined somewhat sharply, but by the close signs of recovery were apparent. The November market was a fluctuating one but, on the whole, a firmer tendency was noticeable, especially at the final auctions, when some lines were distinctly dearer.

More pigs sold by auction.

The number of pigs auctioned during November, 1940, showed a further increase, and although there were only four sale days compared with five in October, the aggregate was 7,774 head, of which 4,110 were received by rail. Private sales in the Metropolitan Area declined slightly, totalling 2,722 head.

Prime porkers scarce.

Porkers were in heavy supply throughout but the bulk of the offerings comprised medium quality sorts and pigs in store condition. During the latter half of the period there was an improvement in the number of good trade descriptions available but prime porkers were consistently scarce. Values generally were lower than those ruling in October and on the final sale day, when offerings appeared to exceed buyers' requirements, the market for light porkers was the weakest experienced since March last, this class selling to 37/6 per head for prime grade of 60 lb. weight. Prices were highest on the first sale day when lightweights brought up to 44/6. Rates for heavy porkers (pigs dressing to 90 lb.) were more stable and highest realisations ranged from 56/6 to 58/6 per head. A feature of some sale days was the marked irregularity of the market for porkers, and on some occasions prices fluctuated to a surprising degree.

Steady market for baconers.

The moderate numbers of baconers available on each sale day comprised pigs of variable weight and quality. Although good trade sorts were well represented, the percentage of prime /descriptions

descriptions was small. On the opening sale day prices of baconers were slightly below the average rates of the previous month, but subsequently the market was firm and values generally showed no further alteration. Quotations for good to prime baconers dressing from 100 lb. to 150 lb. were 64/6 to 90/6 per head or approximately 8d and 7d per lb., respectively.

Smaller consignments of backfatters.

Except on one sale day, the pennings of backfatters were smaller than usual and quality generally was only fair, prime heavy sorts being rather scarce. The opening demand was steady and good to prime animals dressing 200 to 350 lb. were quoted at 5d to 5½d per lb. and those of 350 to 500 lb. brought 4½d to 5¼d. Subsequently values fluctuated and closing rates were ½d per lb. lower.

Pig values lower.

The market generally was not as satisfactory as that of the previous month, values of all lines being lower. On the final sale day, the prices obtained for porkers were extremely disappointing from the producers' viewpoint. Compared with November, 1939, all classes except baconers were cheaper, but in that month only 3,117 pigs were sold by auction.

G.C. & J.W.

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FLAX FIBRE AND TOW.

EXPORTS TO GREAT BRITAIN.

Since the outbreak of the war the possibility of large scale production of flax in Australia has received close attention of experts, while frequent reference to the subject has appeared in the daily press. In view of this the following information from an official source is of interest:

Negotiations by the Fibre Control Board of Great Britain with the Canadian Agricultural Supplies Board regarding the surplus 1940 crop of flax fibre have reached a successful conclusion. The final prices agreed upon have been favourably commented upon by growers, the majority of whom are apparently well satisfied with the offer. The authorised price for top grade is 35 cents per lb. f.o.b. Canada, which is the same as that paid for the 1939 crop; prices for other grades are slightly lower.

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SALES OF FRUIT AND VEGETABLES
AT THE
CITY MUNICIPAL MARKETS, SYDNEY.

Introduction of auction sales of fruit..

An interesting development in the City Municipal Markets on 12th November was the commencement of auction sales of all kinds of fruit by a firm of New Zealand auctioneers. This firm has leased a considerable area (comprising approximately 70 stands) in the No. 3 Fruit Market for its selling rostrum, for seating for buyers and for storage space for the fruit to be offered. As in the past sales in the fruit section have been conducted by private treaty, the introduction of auction selling represents a radical innovation, and so far the daily attendance of buyers has only been moderate; whether the attendance will increase as buyers become accustomed to the system is a question upon which the success of the venture largely depends.

Good disposals of stone fruits.

With the decline in quality of cool stored stocks of apples, buyers turned their attention to the stone fruits offering and good business was transacted in cherries, peaches and apricots, particularly towards the close of the month.

Keen demand for choice apples.

Considerable quantities of Sturmer and French Crab apples were available but few packs could be classed as "extra fancy"; the bulk of the stocks showed breakdown owing to prolonged storage and much wastage was apparent. There was a keen demand for the few lots of local Granny Smiths on offer, and high prices were paid for "specials". Democrats were also sought after, but they were scarce and advanced rates were secured for any quality lines. Victorian Yates and Rokewoods were forward and quality packs were disposed of readily. A few bushels of Allsops from orchards within the County of Cumberland appeared on the market during the last week of November, but mostly were very green and clearances were slow.

Oranges and grapefruit in request.

Consignments of Victorian Navels continued to arrive and these oranges sold well at increased rates. The principal trading, however, was in Valencias, for which there was a very satisfactory inquiry; as at no period were stocks heavy, vendors were able to obtain higher prices.

Although lemons were lightly supplied, there was no marked activity in this section of the trade and values of choice packs remained steady at around 12/- per bushel.

Arrivals of grapefruit from within New South Wales

/declined

declined considerably, but this was offset to some extent by a fairly heavy Victorian consignment. All lines were in request at firm rates.

Bananas heavily stocked.

Heavy stocks of bananas were carried on all floors. As demand was only moderate, considerable quantities of fruit matured and much difficulty was experienced in effecting clearances, even at very low prices. At closing, the market was weak and values were low; nevertheless, an early improvement was anticipated as the consignments from plantations were beginning to decrease.

Satisfactory sales of pineapples and papaws.

Apart from poor quality lots, pineapples sold satisfactorily and, compared with the previous month, realisations were higher. Some packs from Northern Queensland brought about 2/- per case more than similar fruit from the Southern districts of that State.

Despite fairly heavy arrivals, good sales of papaws were reported. Apparently this fruit is becoming more widely known to and popular with consumers. Values were well maintained, choice lines realising to 14/- per tropical case.

Cherry market mostly firm.

With the more popular varieties coming forward from the Orange and Young districts, the market for cherries was firm for the most part. During the last week of the month price ranges for choice were from 5/- to 8/- per quarter case, with specials at higher levels.

Increased offerings of peaches

Supplies of early peaches increased daily and at closing stocks were plentiful. Choice samples were in request, but the demand for medium and lower qualities was weak and small fruit was offered at very low rates to clear. Although the dry conditions adversely affected the development of much of the fruit, the quality of a fair proportion of the arrivals was very pleasing and very little fungus trouble was in evidence. However, the heavy rain which set in on the 30th November will no doubt cause a good deal of loss in any crops at a mature stage.

Choice apricots realise good prices.

The bulk of the apricots from coastal orchards lacked size but those from the Murrumbidgee Irrigation Area mainly showed satisfactory development. Sales generally were very good, choice packs realising to 10/- per half-case.

There was satisfactory inquiry for choice large plums, but small fruit was slow to clear.

Passionfruit cheaper.

Offerings from the Far North Coast and Queensland comprised the main passionfruit supplies, which increased considerably towards the close of November, causing prices to fall sharply.

Dry weather reduces supplies of vegetables.

The continuance of extremely dry weather conditions until the final days of November adversely affected the supply of green vegetables and at times high prices ruled for the principal lines. Trading generally was brisk, particularly on occasions when consignments were reduced.

Peas in request.

During the opening week of November the quantity of peas available mostly was sufficient for buyers' requirements and values of best lots ranged from 8/- to 12/- per bushel. In the next two weeks, consignments were much lighter and rates advanced sharply, the quote for choice quality being 12/- to 16/-. With the receipt of increased supplies from Victoria during the closing week, the market weakened and lower prices were accepted.

Fluctuating market for beans.

The demand for beans showed considerable fluctuation, largely owing to the varying quantities available from day to day. Peak values were obtained during the third week of the month when as much as 16/- per bushel was paid for choice lots.

In the final week, increased offerings from metropolitan gardens brought about a reduction in prices, although the purchase of fairly large quantities for despatch to Victoria had a steadying effect at times when consignments appeared to exceed local requirements.

The receipt of heavy rain on the last day of the month should assure a continuance of plentiful supplies during December.

Values of cabbages advance.

Receipts of cabbages from metropolitan gardens declined and the quality of those on offer was only medium to poor, while considerable moth infestation was apparent. Nevertheless, little difficulty was experienced in effecting sales at very satisfactory prices. Marketing of this vegetable from the Moss Vale districts commenced and some extra choice heads were included in the consignments. There was a keen demand for all lots from this area

/and

and up to 16/- per dozen was obtained for selected heads.

Tomato prices lower at end of month.

While the North Coast districts of New South Wales were the principal sources from which the tomato supplies were derived supplementary stocks were provided by local glasshouse and field-grown lots, as well as by consignments from Menindee, Balranald and South Australia. Comparatively high rates ruled for the first half of the month but subsequently an easier demand prevailed and lower prices were obtained. The season for glasshouse tomatoes has practically finished but increasing quantities from within the Metropolitan Division may be expected.

Keen inquiry for bunched vegetables.

There was a keen inquiry for the light supplies of bunched vegetables forward each day. Values of carrots, beetroot and spinach reached high levels, while such lines as eschalots and radishes realised "above average" rates.

R.M.

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FARM PRODUCE

SALES AT THE ALEXANDRIA RAILWAY GOODS YARD
AND IN SUSSEX STREET.

Shortage of potatoes.

Supplies of potatoes on the Sydney market were very light during the month of November, 1940. At the beginning of the month stocks were moderate and business was steady, but with each succeeding week supplies became smaller and buyers had difficulty in obtaining adequate stocks. From about the third week to the end of the month, a system of rationing was adopted by agents in order that buyers might be insured of obtaining at least portion of their normal requirements; in some instances they received only 3 or 4 bags when normally they would use 10 to 12. Shipments to Sussex Street from other States during the second week were interrupted owing to the temporary closing of Bass Strait. Interstate arrivals by sea for the period under review were as follow:- Tasmania 11,491, West Australia 25,730 and Queensland 600 bags. Tasmanian potatoes met a firm demand throughout, especially during the later stages, deliveries being taken for No.1 grade tubers at the fixed rates of £15 for Brownells and £13.10.0 per ton for whiteskin varieties. Inquiry for West Australian Delawares generally was strong, while compared with the same period last year shipments of this variety were considerably heavier. The arrival of these potatoes prevented to a certain degree what may have been a very serious shortage on the Sydney market. The fixed rate for new grade lots during the month was unchanged at £13 per ton. A Queensland consignment of

/600 bags....

600 bags was received in Sussex Street on 12th November during the week when no supplies were to hand from Tasmania or West Australia resulting in an early clearance of these potatoes at the fixed price of £16 per ton. The market for New Zealand potatoes was only steady at the beginning of the month but became firmer owing to decreasing supplies from other sources. The shipment comprising 9,000 bags, available on Monday, 4th November, completed the quota agreed upon with that country; clearances were effected within a fortnight at the following rates:- Whiteskins £12, Dakota Reds £10 per ton.

Growers in the Northern Rivers (N.S.W.) district shipped 5,426 bags to Sussex Street in November. Sales in the early part of the month were made by auction, but later, business was transacted by private treaty. The general quality was only fair and a portion of the supply needed regrading. Deliveries were taken at the following rates:- New grade £13.15.0 to £16.0.0, No. 2 grade £4.10.0 to £14.0.0 per ton, Chats 2/- to 8/- per bag.

At the Alexandria Railway Goods Yard, the total quantity of new potatoes received from local sources amounted to 15,055 bags, of which growers in the Raleigh district contributed 11,549 bags. The first of the new season's potatoes from Dorrigo were received on Tuesday, 26th November. The quality of the consignment was very good as is usual with tubers from that district. Queensland potatoes were available to the extent of 1,693 bags, portion of which had to be repicked. Demand at the beginning of the period was steady but firmed during the second week when supplies were short, and new grade lines which usually had been auctioned were sold by private treaty at a fixed maximum rate of £16.0.0 per ton. In the last week of the month, the market was very strong and choice No. 2 grade tubers also brought the fixed maximum price. Realisations at Alexandria during the month were as follow:- New South Wales - New grade £11.0.0 to £16.0.0, No. 2 grade £3.10.0 to £16.0.0 (4/6 to 20/9 per bag) per ton, and Chats 2/- to 13/6 per bag; Queensland - New grade £14.11.8 to £16.0.0 per ton.

Onions in great demand.

Throughout November, inquiry for onions, especially white types, was firm and prices were fairly high. At Alexandria, heavy supplies of local onions were received, the total receipts amounting to 6,168 bags. During the first week white onions realised to £21.10.0 per ton and advanced each week until the highest price during the present season, £31.0.0 per ton, was obtained in the last week. All sales were made by auction and the full range of realisations were as follow:- Brown - Table £17.0.0 to £25.15.0, Pickling £14.5.0 to £20.0.0; White - Table £16.10.0 to £31.0.0, Pickling £16.0.0 to £22.5.0 per ton and 20/6 per bag. Receipts from other States comprised 1,032 bags from Victoria and 292 from Queensland. Sales were effected at the following rates:- Victorian - White £19.5.0, Brown £17.0.0 to

/£20.0.0

£20.0.0; Queensland - Brown £21.0.0 per ton. Shipments to Sussex Street consisted of about 3,400 bags from Victoria and 201 from Queensland growers. Demand for stocks from both States generally was firm and sales were reported at £18.0.0 for Victorian White and £10.0.0 to £20.0.0 per ton for Brown Spanish lots. Queensland Brown and White table onions cleared at £23.0.0 to £25.0.0, while pickling onions brought £21.0.0 per ton.

Pumpkins in very short supply.

Throughout the period only small quantities of pumpkins were received on the Sydney market. At Alexandria consignments from Queensland totalled 5 trucks and realisations ranged from £18.0.0 in the first week to £30.0.0 per ton during the last week of the month. Receipts in Sussex Street comprised 855 bags from Queensland and 5 shipped from the Northern Rivers. All lines met a good inquiry and clearances were effected at £16.0.0 to £30.0.0 per ton.

Swedes have been coming forward from the Maitland district in fairly large quantities, the total amount received during November at Alexandria being 1,070 bags. All sales were effected by auction and demand generally was keen owing to the shortage of other types of vegetables. Realisations ranged from £7.10.0 to £13.5.0 per ton. The 6 bags of carrots and 1 bag of parsnips forwarded by rail from Maitland cleared by auction at £23.0.0 per ton and 20/- per bag, respectively. No stocks of these vegetables were received from Tasmania. It is expected that quantities of new season's swedes will be coming from Tasmania in December.

Good demand for chaff commodities.

The yarding of chaff at Alexandria during the period comprised the following:- Oaten - Victorian 8, local 111 trucks; Wheaten 39 and Lucerne 60. Request throughout the month was firm owing to the drought conditions prevailing. Victorian oaten chaff was quoted at £7 to £7.10.0 whilst chaff from local centres brought £5 to £8.5.0 by auction and £6 to £8.10.0 per ton by private treaty. Wheaten chaff realised £6.10.0 to £6.13.4 by auction and £5.15.0 to £7.10.0 per ton by private treaty. A large proportion of the supply of lucerne chaff was only of medium quality and inquiry was only steady; choice lines, however, met a keen demand and sales were effected as follow:- By auction - £6.11.8 to £9.10.0; Privately - £7.10.0 to £10.10.0 per ton.

Drought stimulates sales of lucerne hay.

Receipts of lucerne hay during November at Alexandria consisted of 71 trucks from the Maitland district and 81 from other centres. Green hay from Maitland sold readily and high prices were obtained for some lines. Realisations ranged from

/£4.10.0

£4.10.0 to £9.0.0 per ton. Hay from other districts was also in demand and deliveries were taken at the following rates:- By auction - £8.0.0 to £9.0.0, dorricks-pressed £6.15.0; By private treaty - £7.0.0 to £10.5.0 per ton. Shipments to Sussex Street from the Hunter River district amounted to 541 bales and sales were made at prices ranging from £5.0.0 to £7.15.0 per ton.

Only a portion of the 31 trucks of oaten hay forwarded to Alexandria was for sale, realisations being as follow:- By auction - inferior £5.5.0 to £6.10.0, by private treaty - inferior £5.5.0 to £8.10.0 for extra choice lots. No oaten hay was received in Sussex Street from Victoria.

Receipts of straw at Alexandria comprised 15 trucks from Victoria and 12 from local districts. Sales were steady at £4.10.0 to £5.0.0 for choice lots from both sources; one truck brought £3.11.8 per ton at auction. No Tasmanian straw was received during the month.

Grain sales.

Wheat to hand during the period amounted to 13 trucks, portion of which cleared by auction at 4/- to 4/4¹/₂d per bushel. F.A.Q. lots brought 4/5d per bushel by private treaty.

Receipts of yellow maize comprised the following:- At Alexandria - Queensland 1,328 bags, local 1,504; In Sussex Street - local 756. Demand was good and supplies became progressively lighter and as a result prices advanced. Sales by private treaty were effected at 6/- for Queensland and 6/- to 6/6 for North Coast maize. Auction sales were held on two occasions and clearances were made at 5/11 and 6/5d per bushel.

Portion of the 35 trucks of oats in position at Alexandria during November sold by auction at prices ranging from 3/6d to 3/10d per bushel. Private sales were reported at 3/6d per bushel.

R.E.J.

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"We must watch out lest conservation of our physical resources be pushed with full regard for the loss of dollars flowing off and down our streams, but no primary regard for wasted humanity. It is selfishness that has destroyed our natural resources, and to plead for conservation merely to stop the loss of dollars is to appeal to the same selfishness that wrought the destruction.

It is only when human beings become the primary objective that conservation becomes the highest national virtue. Conservation can never become our master plan except as a nation's restitution for a great wrong done - not only to land, but to people." - HENRY A. WALLACE, Secretary of Agriculture, U.S.A.

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WHOLESALE PRICES OF VARIOUS COMMODITIES
IN SYDNEY (N.S.W.) DURING NOVEMBER, 1940, AND
CORRESPONDING FIGURES AT 31st AUGUST, 1939.

The following table gives particulars of the range of prices in Sydney as collected and recorded by the State Marketing Bureau in respect of various commodities for the periods indicated:

<u>Commodity</u>	<u>November, 1940</u>			<u>31st August, 1939</u>	
	<u>From</u>	<u>To</u>		<u>From</u>	<u>To</u>
Wheat - Home Consumption:					
Bulk - per bushel	3/11 ¹ / ₄ d	} unchanged		2/4d	
Bagged " " "	4/2 ¹ / ₄ d			2/5d	
Flour - per ton	£10.1.2 (plus £2.8.10 tax)	£10.4.2 (plus £2.8.10 tax)		£6.12.3 (plus £6.2.9 tax)	
Bran - per ton	£6.0.0	} unchanged		£4.5.0	
Pollard " "	£6.0.0			£4.5.0	
Eggs (hen) per dozen	1/2	1/3		1/-	
Butter: per cwt.					
Choice	161/2	} unchanged		161/2	
First Quality	156/6			156/6	
Second " "	151/10			151/10	
Cheese:					
Loaf per lb.	11d	} unchanged		11d	
Large " "	10 ¹ / ₂ d			10 ¹ / ₂ d	
Special Brands - per lb.	1/-	1/2		1/2	
Pigs (Abattoir Sales):					
	<u>November, 1940</u>		<u>29th August, 1939</u>		
Good to prime - per head	<u>From</u>	<u>To</u>	<u>From</u>	<u>To</u>	
Porkers - Extra light	23/6	39/6	31/6	40/6	
" - Light	32/6	44/6	39/6	44/6	
" - Medium weight	36/6	53/6	43/6	51/6	
" - Heavy	50/6	58/6	50/6	54/6	
Baconers	64/6	90/6	60/6	75/6	
Backfatters	£3.15.0	£10.10.0	£4.5.0	£8.10.0	

Note: The pig sales nearest to 31st August, 1939, were those held on 29th August, 1939.

RETURN OF FRUIT AND VEGETABLES IMPORTED INTO NEW SOUTH WALES
BY LAND AND SEA - OCTOBER, 1940.

FRUIT.

STATE	Pineapples tropical cases	Bananas tropical cases	Other Fruit cases	Tomatoes half-bushel cases	Melons crates	TOTALS packages
Queensland	37,207	14,846	10,224 ^x	134,868	149	197,294
Victoria	9	82	46,711 ^o	749	-	47,551
Tasmania	-	-	50,733	-	-	50,733
Sth. Aust.	-	-	3,235	-	-	3,235
West Aust.	-	-	1,000	37	-	1,037
TOTALS:	37,216	14,928	111,903	135,654	149	299,850

x Also 1,279 trays strawberries.
o " 12 bags apples

VEGETABLES.

STATE	Potatoes	Onions	Swedes	Pumpkins		Cucs. & Chillies	Other Vegs.	TOTALS	
	bags	bags	bags	bags	tons	cases	pkges.	pkges.	tons
Queensland	4,156	1,514	-	15,212	227 $\frac{3}{4}$	10,179	7,950	39,011	227 $\frac{3}{4}$
Victoria	3,926	22,744	85	-	-	-	1,099	27,854	-
Tasmania	55,344	-	57	-	-	-	1,323	56,724	-
Sth. Aust.	731	135	-	-	-	-	6,025	6,891	-
West Aust.	1,259	-	-	-	-	-	-	1,259	-
TOTALS:	65,416	24,393	142	15,212	227 $\frac{3}{4}$	10,179	16,397	131,739	227 $\frac{3}{4}$

FISH

GRAPH SHOWING ESTIMATED "SPREAD" BETWEEN THE RETURN TO THE FISHERMAN AND THE PRICE PAID BY THE CONSUMER. DURING THE PERIOD 1.1.40 TO 30.6.40.

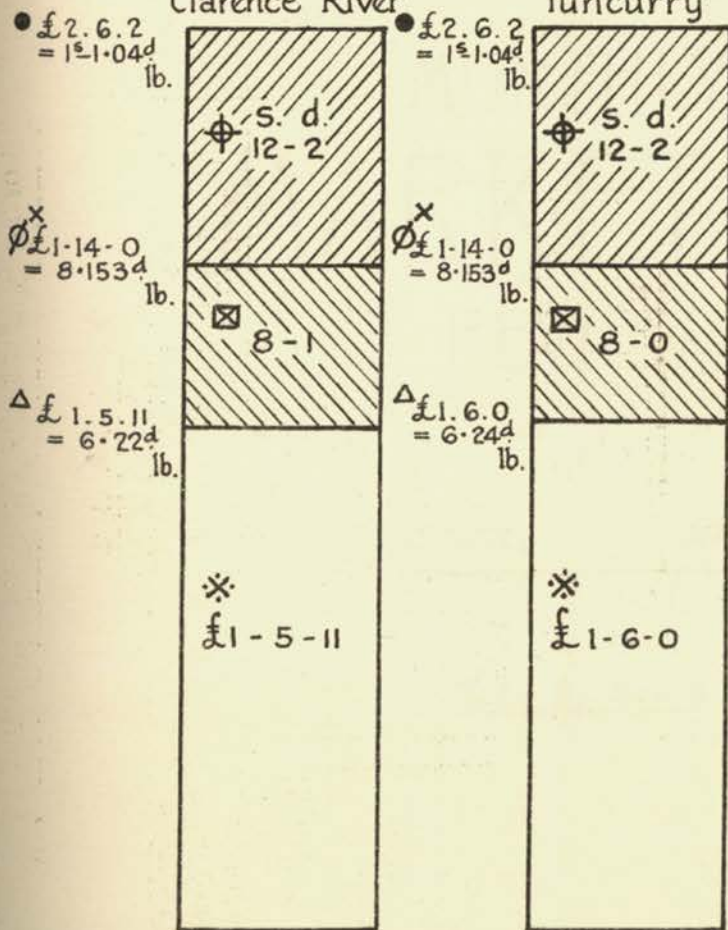
40.1223

BLACK BREAM

Box :- 50lb. = 42½ lb. cleaned.

MACLEAN
Clarence River

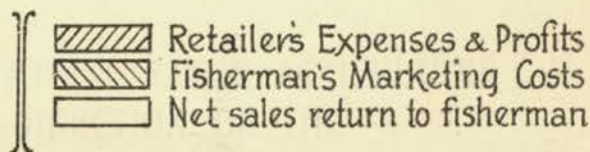
WALLIS LAKE
Tuncurry



NOTES:-

- * FISHERMANS COSTS OF CATCHING AND OTHER LOCAL COSTS TO BE DEDUCTED FROM THIS RETURN.
- ⊗ RETAILER'S COSTS OF CLEANING, CARTAGE, RENT OF SHOP, WAGES, WASTAGE ETC. TO BE DEDUCTED FROM THIS RETURN.
- ∅ THE GREATER PORTION OF BLACK BREAM SUPPLIES IS SOLD ON A PER LB. BASIS, THAT IS, IN SMALLER QUANTITIES AT HIGHER RATES THAN THE "PER BOX" QUOTATIONS
- ⊠ FISHERMANS MARKETING COSTS INCLUDE ICE, CARTAGE TO RAIL, RAIL FREIGHT, RECEIVING CHARGE, CARTAGE RAIL TO MARKET, MARKET DUES, AGENTS COMMISSION (10%), RENT OF BOXES, RETURN OF EMPTY BOXES.

● Retail Price (Consumer paid for cleaned whole fish)
 ⊗ Retailer paid (at City Municipal Markets)
 Δ Net sales return to fisherman.



Compiled, - G.C. 7.11.40
 Compilation Checked, - C.K. 7.11.40
 Graph Drawn, - E.H.S. 15.11.40
 Graph Checked, - C.K. 15.11.40

A. A. WATSON
 Chief of Division of Marketing