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EDITORIAL**STRUCTURAL CHANGES IN THE DAIRY INDUSTRY.**

The Australian dairy industry employs nearly one quarter of the total rural labour force and the value of its production places it third in the list of primary industries. The progress of the industry to its present status has been accomplished in the face of physical and institutional handicaps, some of which still persist.

Dairy farming has been carried on in widely scattered areas and in regions of sub-tropical and warm temperate climates so that, in the earlier or pioneering period, and even to-day, conditions have hindered the effectiveness of the marketing system and have also impeded efforts to make available high quality, but perishable, products for consumption in Australia and overseas.

The improvement of transport services, particularly the extension of coastal rail facilities in the early years of the present century, together with developments in the field of refrigeration engineering have widened the ultimate scope of the industry and have made possible the subsequent development of efficient marketing organizations with large financial resources. Changes of this kind have been accompanied by the adoption of many scientific methods of farm husbandry involving farm mechanization, pasture improvement and increasing efficiency of herd **management.**

The changes which have been taking place in the pattern of farm management, and the rate at which these changes have been taking place, have not been uniform in all districts, or on all farms within any one district. These variations in land use patterns are worthy of close analysis. They cannot be explained by the postulation of any simple formula. To appraise the varying land use techniques, in order to explain for example any differences in productivity between farms, would require the detailed examination and sympathetic understanding of the whole complex of factors which influence the dairy farmer in his day-to-day management.

One approach to such a study is the method of the detailed field survey based on personal interviews with a number of farmers in a small but representative area, with the object of studying a wide range of topics. The results of such a survey could not be applied to other areas or to the industry as a whole without some significant qualifications. However, such a survey would be of value in assisting a fuller understanding of the more intricate character of the dairy industry and the various problems with which farmers are faced.

A survey along these lines was carried out on the Lower North Coast in the early part of 1951. A general description of the character of land utilization, farm production, and farm tenure in the survey area is published herein. It is intended that the results of a closer examination of the relationships between some of these factors will be published in a later issue.

The survey demonstrates the varied character of land use on the dairy farms surveyed. The reasons for some of these differences were found to be neither few in number nor easily distinguishable.