

CHAPTER XVI.

PASTORAL PRODUCTION.

§ 1. Initiation and Growth of Pastoral Industry.

1. **Early Statistics.**—In earlier issues of the Year Book will be found a brief reference to the pastoral industry in Australia prior to the year 1860. (See Year Book No. 6, page 330).

2. **Subsequent Statistics.**—While the statistical records of live stock in Australia prior to the year 1860 are somewhat defective, from that year onwards fairly complete particulars are available for most of the States. At the present time, statistics of live stock are collected annually in all the States principally through the agency of the police, but in the years 1885 to 1888 inclusive, and 1893 to 1895 inclusive, these particulars were not collected in South Australia, and similar gaps occur in the Victorian records for the periods 1895 to 1899 inclusive, and 1901 to 1903. In order to obtain totals for Australia for these years the missing numbers have been supplied by interpolation. The results so obtained probably differ but slightly from the actual numbers for the respective years.

3. **Increase in Live Stock.**—Particulars concerning the numbers of each of the principal kinds of live stock in Australia at decennial intervals from 1860 to 1920, and from 1922 onwards in single years, are given in the following table, and are shown continuously in the graphs hereinafter.

During the sixty-six years covered by the table the live stock of Australia increased considerably, horses 392 per cent., cattle 202 per cent., sheep 418 per cent., and pigs 182 per cent. The average annual increases which these aggregates represent are as follows:—Horses, 2.44 per cent.; cattle, 1.79 per cent.; sheep, 2.53 per cent.; and pigs, 1.58 per cent.

LIVE STOCK.—AUSTRALIA, 1860 TO 1926.

Year.	Horses.	Cattle.	Sheep. (a)	Pigs.
1860	431,525	3,957,915	20,135,286	351,096
1870	716,772	4,276,326	41,593,612	543,388
1880	1,068,774	7,527,142	62,184,252	815,776
1890	1,521,598	10,299,816	97,881,221	891,138
1900	1,609,654	8,640,225	70,602,995	950,349
1910	2,165,866	11,744,714	98,066,046	1,025,850
1920	2,415,510	13,499,737	81,795,727	764,406
1922	2,390,460	14,336,673	82,700,514	985,930
1923	2,327,440	13,357,508	84,011,048	897,874
1924	2,292,050	13,309,473	93,154,953	980,009
1925	2,250,361	13,279,785	103,563,218	1,128,374
1926	2,122,516	11,963,278	104,267,101	989,009

(a) See note to Table in § 4. 2 hereinafter.

4. **Fluctuations.**—The increases referred to, however, have not been continuous marked fluctuations having taken place during the period mainly on account of the droughts which have from time to time left their impress on the pastoral history of Australia. These were in evidence in 1868, 1877, 1883–4, 1892, 1893, 1895, and subsequent years, 1901–2, 1912, 1914–15, 1918, 1919, 1922–23, and again in 1925–26, in which latter years Central and Northern Queensland experienced one of the driest periods on record, and a heavy mortality of stock.

As an offset to these visitations, good seasons invariably supervene on the dry periods, and the large natural increases occurring under these conditions greatly facilitate the process of restocking, thus bearing convincing testimony to the extraordinary recuperative powers of the country.

The years in which the numbers of live stock attained their maxima are as follows:—Horses, 1918, 2,527,149; cattle, 1921, 14,441,309; sheep, 1891, 106,421,068; and pigs, 1917, 1,169,365.

5. Live Stock in Relation to Population.—The number of each kind of live stock per head of the population of Australia has varied during the past sixty-six years in the manner shown in the succeeding table:—

LIVE STOCK PER HEAD OF POPULATION.—AUSTRALIA, 1860 TO 1926.

Year.	Horses.	Cattle.	Sheep.	Pigs.	Year.	Horses.	Cattle.	Sheep.	Pigs.
1860 ..	0.38	3.45	17.58	0.31	1920 ..	0.44	2.49	15.11	0.14
1870 ..	0.43	2.60	25.24	0.33	1922 ..	0.42	2.54	14.68	0.17
1880 ..	0.48	3.37	27.87	0.37	1923 ..	0.40	2.31	14.61	0.16
1890 ..	0.48	3.17	31.06	0.28	1924 ..	0.39	2.27	15.86	0.17
1900 ..	0.43	2.29	18.75	0.25	1925 ..	0.38	2.22	17.28	0.19
1910 ..	0.49	2.65	22.16	0.23	1926 ..	0.35	1.96	17.06	0.16

6. Live Stock in Relation to Area.—The numbers of live stock per square mile in the several States and Territories of Australia are given in the following table:—

LIVE STOCK PER SQUARE MILE, 1926.

States and Territories.	Horses.	Cattle.	Sheep.	Pigs.
New South Wales (a)	2.01	9.09	180.03	1.08
Victoria	5.10	16.34	169.77	3.23
Queensland	0.85	8.15	25.15	0.27
South Australia	0.62	0.89	19.16	0.21
Western Australia	0.17	0.85	7.64	0.07
Tasmania	1.40	8.13	68.95	1.48
Northern Territory	0.08	1.65	0.01	0.00
Federal Capital Territory (a) ..	1.47	5.86	238.38	0.10
Total	0.71	4.02	35.05	0.33

(a) 30th June, 1927.

7. Minor Classes of Live Stock.—The numbers of minor classes of live stock returned for 1926 were as follows:—Goats, 174,233; camels, 10,238; mules and donkeys, 17,166; and ostriches, 390. Of these, goats were most numerous in Queensland; camels, mules and donkeys in Western Australia; and ostriches in South Australia. In the raising of goats, attention has in recent years been devoted to the angora goat and its product (mohair), and about 11,000 angora goats are included in the total of 174,233 goats shown above. Of these, 1,926 were in New South Wales, 761 in Tasmania, 1,947 in Western Australia, 1,405 in South Australia, and 3,343 in Queensland, while the quantity of mohair produced in the latter State in 1926 was set down at 1,532 lbs., and the number of skins placed on the market was returned as 487.

8. Net Exports of Principal Pastoral Products.—The quantities by which the exports of the principal pastoral products of Australia exceeded the imports for the years 1922-23 to 1926-27 are as follows:—

NET EXPORTS OF PASTORAL PRODUCTS.—AUSTRALIA, 1922-23 TO 1926-27.

Products.	Unit of Quantity.	1922-23.	1923-24.	1924-25.	1925-26.	1926-27.
QUANTITIES.						
Animals (living)—						
Cattle	No.	13,818	-71	9,674	9,898	10,093
Horses	"	3,545	1,478	4,604	5,255	5,276
Sheep	"	37,959	30,302	4,143	20,331	26,218
Bones	cwt.	23,276	26,158	23,748	27,329	18,394
Glue-pieces and Sinews	"	6,927	-1,993	-11,055	-8,757	-12,840
Glycerine	lb.	343,292	-230,485	-489,113	-603,485	-553,950
Hair	"	(a)	(a)	(a)	(a)	(a)
Hoofs	cwt.	11,174	10,380	8,340	20,510	8,371
Horns	"	(a)	(a)	(a)	(a)	(a)
Meats—						
Frozen Beef	lb.	152,925,321	105,145,255	283,584,278	214,058,586	112,124,913
Frozen Mutton and Lamb	"	167,578,967	39,768,347	50,224,659	85,679,850	93,514,533
Frozen Rabbits and Hares	pair	4,264,054	3,489,496	3,415,334	4,043,511	3,298,372
Frozen, Other	lb.	13,062,037	6,687,005	9,141,545	8,935,456	3,893,937
Potted, and Extract of	"	(a)	(a)	(a)	(a)	(a)
Preserved in Tins, etc.	lb.	10,583,164	4,268,814	8,687,019	10,209,971	8,674,251
Other (excluding Bacon and Ham)	"	489,564	234,058	314,867	211,403	166,537
Sausage Casings	cwt.	24,623	13,213	26,860	24,119	24,222
Skins—						
Hides	No.	47,900	665,466	900,274	699,030	720,065
Sheep	"	10,237,162	6,891,162	6,016,231	8,007,249	8,487,652
Rabbit and Hare	cwt.	122,748	77,862	116,522	134,024	126,745
Other (including Undressed Furs)	"	(a)	(a)	(a)	(a)	(a)
Tallow	cwt.	1,016,831	394,313	855,596	824,974	833,336
Wool—						
Greasy	lb.	597,429,649	478,210,488	489,669,907	767,812,768	709,438,954
Scoured	"	106,319,965	41,735,194	39,221,259	49,972,194	52,110,342
Tops	"	6,374,922	4,988,258	4,090,958	5,219,085	4,519,357

NOTE.—The minus sign — signifies net imports. (a) Quantity not available.

The values of the net exports for the same five years are furnished in the next table, and amount to no less a total than £368,382,182 for the period, or an average of £73,676,436 per annum, of which wool represents 81.04 per cent. Meat, skins, and tallow rank next in order of importance.

NET EXPORTS OF PASTORAL PRODUCTS.—AUSTRALIA, 1922-23 TO 1926-27.

Products.	1922-23.	1923-24.	1924-25.	1925-26.	1926-27.
VALUES.					
Animals (living)—					
Cattle	£ 64,731	£ -31,430	£ 43,628	£ 32,632	£ 43,663
Horses	27,978	-36,741	28,062	-8,655	35,313
Sheep	42,017	40,887	29,793	27,958	15,390
Bones	26,137	32,301	23,631	22,407	11,783
Glue-pieces and Sinews	13,725	21,688	10,363	3,071	-6,442
Glycerine	8,536	-5,965	-10,898	-15,586	-21,284
Hair	-62,830	-70,283	-73,556	-63,681	-44,354
Hoofs	8,137	7,723	6,011	10,459	4,768
Horns	35,388	32,888	47,216	36,102	21,291
Meats—					
Frozen Beef	1,794,104	1,301,304	4,138,729	3,263,859	1,626,640
Frozen Mutton and Lamb	4,320,977	1,169,667	1,520,655	2,430,430	2,057,443
Frozen Rabbits and Hares	321,329	320,442	310,683	399,039	303,752
Frozen, Other	189,170	95,127	165,002	166,538	78,956
Potted, and Extract of	-40,170	-78,343	-49,953	-30,580	-38,673
Preserved in Tins, etc.	266,273	94,094	247,405	328,888	279,167
Other (excluding Bacon and Ham)	10,577	5,798	4,058	3,083	1,671
Sausage Casings	285,504	154,068	208,673	259,299	179,434
Skins—					
Hides	249,208	338,263	890,639	713,589	605,600
Sheep	2,973,146	3,057,789	3,773,328	3,413,809	3,330,745
Rabbit and Hare	1,961,777	1,348,508	2,482,933	2,874,582	2,832,128
Other (including Undressed Furs)	785,467	798,166	323,325	569,744	1,026,667
Tallow	1,612,676	745,209	1,703,308	1,584,465	1,402,020
Wool—					
Greasy	45,769,295	48,294,399	55,297,455	58,429,712	53,224,169
Scoured	9,898,651	6,293,197	6,524,471	5,537,671	5,726,308
Tops	1,412,683	1,161,920	1,119,849	1,035,107	822,713
Total Values	71,974,486	65,095,676	78,769,210	79,023,942	73,518,863

NOTE.—The minus sign — signifies net imports.

§ 2. Horses.

1. *Suitability of Australia for Horse-breeding.*—From the earliest times the suitability of the climate and pastures of Australia for the production of serviceable breeds of horses has been fully recognized. By the importation of high-class sires, and the careful selection of breeding mares, these natural advantages are utilized to the fullest extent, all classes of horses being bred. As a consequence of this combination of advantages, the Australian horse, whether of the heavy draught, medium weight, or light saddle and carriage variety, compares more than favourably with the product of other lands. The Australian horse has been found suitable for the army in India, and large numbers are obtained annually for remount purposes. During the war, Australian horses were found to be well adapted for all purposes, especially in Palestine.

2. *Distribution throughout Australia.*—As regards numbers, the State of New South Wales, the earliest settled of the group, established a lead, which it retained till the year 1914, when it gave place to Queensland, where rapid progress had been in evidence during the previous decade. New South Wales regained the lead during the next three seasons, but Queensland again replaced the latter State in 1918, and maintained its position until the recent drought which has seriously depleted its stocks.

Particulars of the several States for the past five years are as follows:—

HORSES.—NUMBER, 1922 TO 1926.

Year.	N.S.W. (a)	Vic.	Q'land.	S. Aust.	W. Aust.	Tas.	N.T.	F.C.T. (a)	Total.
1922	658,686	494,947	713,015	264,150	181,159	37,313	39,845	1,345	2,390,460
1923	656,939	486,075	660,387	258,489	181,944	37,570	44,603	1,433	2,327,440
1924	646,110	473,236	659,023	255,022	175,116	37,091	45,059	1,393	2,292,050
1925	649,534	463,051	637,436	244,111	170,563	37,785	46,380	1,501	2,250,361
1926	622,009	447,988	570,690	234,352	166,463	36,830	42,801	1,383	2,122,516

(a) 30th June year following.

The number of horses attained its maximum in Australia during 1918, when 2,527,149 were recorded. Since that date, however, a gradual decline has taken place in all divisions of the Commonwealth, except Northern Territory, the decrease for Australia during the period amounting to 404,633.

Particulars regarding the number of horses in Australia from 1860 onwards, may be ascertained from the graph herein.

3. *Proportions in the Several States and Territories.*—The percentages of the number of horses in the several States and Territories on the total for Australia for the past five years are as follows:—

HORSES.—PERCENTAGE IN EACH STATE, 1922 TO 1926.

Year.	N.S.W.	Vic.	Q'land.	S. Aust.	W. Aust.	Tas.	N.T.	F.C.T.	Total.
	%	%	%	%	%	%	%	%	%
1922 ..	27.55	20.70	29.83	11.05	7.58	1.56	1.67	0.06	100.00
1923 ..	28.23	20.88	28.37	11.11	7.82	1.61	1.92	0.06	100.00
1924 ..	28.19	20.65	28.75	11.13	7.64	1.62	1.96	0.06	100.00
1925 ..	28.86	20.58	28.32	10.85	7.58	1.68	2.06	0.07	100.00
1926 ..	29.30	21.11	26.89	11.04	7.84	1.73	2.02	0.07	100.00

The relative changes in distribution are insignificant, the greatest alteration being a decrease of 3 per cent. in Queensland.

4. *Relation to Population.*—In proportion to population, horses are much more numerous in the Northern Territory than in any other of the principal divisions of Australia. Queensland is next in order, while Tasmania has the smallest number of

horses per head. The number per head of population has declined in all the statistical divisions since 1922. Particulars for the past five years as follows:—

HORSES.—NUMBER PER HEAD OF POPULATION, 1922 TO 1926.

Year.	N.S.W.	Victoria.	Q'land.	S. Aust.	W. Aust.	Tas.	N. Ter.	Fed. Cap. Ter.	All States.
1922 ..	0.30	0.31	0.90	0.51	0.53	0.17	11.22	0.41	0.42
1923 ..	0.30	0.30	0.81	0.49	0.51	0.17	12.55	0.39	0.40
1924 ..	0.29	0.29	0.79	0.47	0.48	0.17	12.60	0.46	0.39
1925 ..	0.28	0.27	0.74	0.44	0.46	0.17	12.69	0.38	0.38
1926 ..	0.26	0.26	0.65	0.41	0.44	0.17	10.98	0.28	0.35

5. Comparison with other Countries.—The number of horses in some of the leading horse-breeding countries of the world, according to the latest available returns, is as follows:—

HORSES.—NUMBER IN PRINCIPAL COUNTRIES.

Country.	Date.	Number of Horses ('000 omitted.)	Country.	Date.	Number of Horses ('000 omitted.)
Soviet Republics ..	1926	26,365	Union of South Africa	1925	815
U.S. of America ..	1926	15,279	Czecho-Slovakia ..	1925	740
Argentine Republic..	1922	9,432	Dutch East Indies..	1925	730
Brazil	1920	5,254	Sweden	1920	728
China	1916	4,401	Cuba	1925	684
Germany	1926	3,873	Turkey	1926	639
Canada	1926	3,559	Spain	1924	634
Poland	1921	3,290	Denmark	1926	548
France	1926	2,894	Lithuania	1926	535
India (British and Native)	1925	2,200	Uruguay	1924	510
Australia	1926	2,123	Paraguay	1918	490
Rumania	1926	1,877	Finland	1926	400
Japan	1925	1,553	Bulgaria	1920	398
United Kingdom ..	1926	1,403	Irish Free State ..	1926	379
Jugo-Slavia	1926	1,117	Latvia	1926	365
Italy	1919	990	Netherlands	1921	364
Colombia	1926	980	Chile	1925	324
Mexico	1926	964	New Zealand	1926	315
Hungary	1926	885	Philippine Islands..	1924	314

NOTE.—In some of the above countries only the horses on farms are enumerated.

6. World's Totals.—Several countries do not issue annual statistics of live stock, the information available consisting of censuses or estimates made at varying intervals, It is not possible, therefore, to give world aggregates for the different classes of stock year by year, nor to make a satisfactory comparison between the totals for consecutive years. In order, however, to give some idea of the latest position as regards live stock and the changes that have taken place as compared with pre-war years, the following information has been taken from the report issued by the International Institute of Agriculture. The list of countries included is fairly complete, but China, which possesses large numbers of horses, is omitted, as also are certain parts of Asiatic Russia, together with a few other countries. While for some countries the figures are the result of careful enumeration, in the case of others they are merely approximations. The

totals, therefore, can be regarded as a general indication only of the position at the dates shown. The figures for horses are as follows:—

HORSES.—WORLD'S TOTALS, 1913 AND 1926.

Continents, &c.	Number at the date nearest—		Increase (+) or Decrease (–) in 1926.	
	1913.	1926.	Actual Figures.	Percentages.
	,000	,000	,000	%
Europe	46,620	42,387	–4,233	–9.1
North and Central America	26,133	21,385	–4,748	–18.2
South America	18,162	17,696	–466	–2.6
Asia	12,457	12,025	–432	–3.5
Africa	1,689	2,056	+367	+21.7
Oceania	2,968	2,592	–376	–12.7
Total	108,029	98,141	–9,888	–9.2

Compared with the pre-war totals reductions have taken place in all the continents, with the exception of Africa, where the number of horses is relatively insignificant. The greatest decrease occurred in North and Central America, viz.:—4,748,000, largely as the result of the decline in the United States.

7. Oversea Trade in Horses.—(i) *Exports.* Australia's export trade in horses is not nearly as large as formerly, and is somewhat fluctuating. During the past five years it has varied in number between 5,619 in 1926–27 and 1,785 in 1923–24, and in value between £160,714 in 1924–25 and £59,799 in 1923–24. The total number of horses exported during the five years amounted to 21,828, valued at £603,255, or equal to an annual average of 4,366 for £120,651. The average export price for the period was £27 12s. 8d. Nearly 81 per cent. of the horses exported went to India, where they are largely used for remount purposes.

(ii) *Imports.* The number of horses imported into Australia is comparatively small, consisting mainly of valuable animals introduced for breeding purposes, principally from the United Kingdom and New Zealand. The average value per head of the horses imported during the last five years was £333 14s. 3d., as compared with £27 12s. 8d. per head for the exports for the same period. The average number imported per annum was, however, only 334, and the average annual value, £111,460. The following table gives the imports, exports, and net exports of horses during each of the years from 1922–23 to 1926–27:—

HORSES.—IMPORTS AND EXPORTS, AUSTRALIA, 1922–23 TO 1926–27.

Year.	Imports.		Exports.		Net Exports.	
	No.	Value.	No.	Value.	No.	Value.
		£		£		£
1922–23	309	81,685	3,854	109,663	3,545	27,978
1923–24	307	96,540	1,785	59,799	1,478	–36,741
1924–25	356	132,652	4,960	160,714	4,604	28,062
1925–26	355	135,124	5,610	126,469	5,255	–8,655
1926–27	343	111,297	5,619	146,610	5,276	35,313

NOTE.—The minus sign — signifies net imports.

§ 3. Cattle.

1. Purposes for which Raised.—In all the States, cattle-raising is carried out on a more or less extensive scale, the main objects in certain districts being the production of stock suitable for slaughtering purposes, and in others the raising of profitable dairy herds. The great impetus which the development of the export trade in Australian butter gave to the dairying industry led to a considerable increase in numbers and improvement in quality of the dairy herds in Victoria, New South Wales, and Southern Queensland in particular, the portion of Australia in the temperate zone being the best adapted to this industry. On the other hand, by far the finest specimens of beef-producing cattle are those raised in the tropical districts, i.e., in the northern parts of Queensland, in the Northern Territory, and in the Kimberley districts in the north of Western Australia.

2. Distribution throughout Australia.—Until 1880 New South Wales occupied the leading position as a cattle-raising State, but in that year Queensland took first place, which it has since maintained. The graph herewith shows a rapid increase in the number of cattle in Australia up to the year 1894, when 12,311,617 head were depastured. From 1895 onwards, however, the effects of droughts and the ravages of tick fever reduced the number to 7,062,742 in 1902. Following the disastrous drought which terminated in the latter year, the herds were gradually built up, and despite recurring droughts, they continued to increase in recent years until the maximum number of 14,441,309 cattle was attained in 1921. The decline in the frozen beef trade and the droughts of 1922–23 and 1925–26, which particularly affected the beef cattle areas of New South Wales and Queensland, were mainly responsible for the heavy decreases recorded in both these States during the past five years. Preliminary figures available for certain of the States reveal further decreases during 1927.

The numbers of cattle in the several States and Territories during each of the last five years are as follows :—

CATTLE.—NUMBER, 1922 TO 1926.

Year.	N.S.W. (a)	Victoria.	Q'land.	S. Aust.	W. Aust.	Tas.	Nor. Ter.	Fed. Cap. Ter. (a)	Total.
1922	3,244,905	1,785,660	6,955,463	(a)425,811	939,596	218,197	760,766	6,275	14,336,673
1923	2,932,437	1,591,367	6,396,514	(a)413,272	953,764	220,351	843,718	6,085	13,357,508
1924	2,871,196	1,605,554	6,454,653	400,423	891,564	225,740	855,285	5,058	13,309,473
1925	2,931,818	1,513,787	6,436,645	373,597	835,911	212,373	970,342	5,312	13,279,785
1926	2,813,144	1,435,761	5,464,845	340,007	827,303	213,112	863,597	5,509	11,963,278

(a) 30th June year following.

3. Proportion in each State.—Percentages showing the relative importance of the various cattle-breeding States during the years 1922 to 1926 are given hereunder :—

CATTLE.—PERCENTAGE IN EACH STATE, 1922 TO 1926.

Year.	N.S.W.	Victoria.	Q'land.	S. Aust.	W. Aust.	Tas.	Nor. Ter.	Fed. Cap. Ter.	Total.
	%	%	%	%	%	%	%	%	%
1922 ..	22.63	12.46	48.52	2.97	6.55	1.52	5.31	0.04	100.00
1923 ..	21.95	11.91	47.89	3.09	7.14	1.65	6.32	0.05	100.00
1924 ..	21.57	12.06	48.50	3.01	6.70	1.69	6.43	0.04	100.00
1925 ..	22.08	11.40	48.47	2.81	6.29	1.60	7.31	0.04	100.00
1926 ..	23.51	12.00	45.68	2.84	6.92	1.78	7.22	0.05	100.00

Queensland contains within its borders nearly one half of the cattle-herds of Australia. Despite decreases during recent years the percentage of cattle in Queensland on the total for Australia amounted to 45.68 in 1926. The largest relative gain since 1922 occurred in the Northern Territory, the only statistical division in which the number of cattle has increased during the past four years.

4. Relation to Population.—The number of cattle per head of population varies considerably in the several States, as may be seen from the following table :—

CATTLE.—NUMBER PER HEAD OF POPULATION, 1922 TO 1926.

Year.	N.S.W.	Victoria.	Q'land.	S. Aust.	W. Aust.	Tas.	Nor. Ter.	Fed. Cap. Ter.	All States.
1922 ..	1.48	1.12	8.82	0.82	2.73	1.00	214.24	1.93	2.54
1923 ..	1.32	0.98	7.89	0.78	2.70	1.01	237.33	1.65	2.31
1924 ..	1.27	0.97	7.73	0.74	2.45	1.03	237.75	1.69	2.27
1925 ..	1.28	0.90	7.47	0.68	2.24	0.98	265.41	1.35	2.22
1926 ..	1.20	0.84	6.19	0.60	2.18	0.99	221.55	1.12	1.96

5. Comparison with other Countries.—In the following comparison of the herds of Australia with those of some of the principal cattle-raising countries of the world, the latest available figures have been inserted in each case :—

CATTLE.—NUMBER IN VARIOUS COUNTRIES.

Country.	Date.	No. of Cattle (,000 omitted).	Country.	Date.	No. of Cattle (,000 omitted).
India (British and Native)	1925	149,189	Czecho-Slovakia ..	1925	4,691
U.S. of America ..	1926	57,521	French Equatorial and West Africa ..	1924	4,539
Soviet Republics ..	1926	53,165	Cuba	1925	4,512
Argentine Republic ..	1922	37,065	Tanganyika Territory ..	1926	4,472
Brazil	1920	34,271	Dutch East Indies ..	1925	4,343
Germany	1926	17,133	Siam	1926	4,014
China	1921	15,973	Irish Free State ..	1926	3,947
France	1926	14,482	Jugo-Slavia	1926	3,706
Australia	1926	11,963	Spain	1924	3,436
Union of South Africa ..	1925	9,738	New Zealand	1926	3,452
Canada	1926	9,160	Kenya	1926	3,413
Uruguay	1924	8,432	Nigeria	1926	3,162
United Kingdom	1926	8,117	Japan	1924	3,157
Poland	1921	8,063	Denmark	1926	2,838
Madagascar	1925	7,659	Sweden	1920	2,737
Turkey	1926	6,537	Rhodesia	1926	2,552
Colombia	1926	6,500	Bolivia	1926	2,320
Italy	1919	6,239	Venezuela	1922	2,278
Paraguay	1918	5,500	Austria	1923	2,162
Mexico	1926	5,121	Netherlands	1921	2,063
Rumania	1926	4,798			

6. World's Totals.—The information in the appended table has been taken from the returns published by the International Institute of Agriculture at Rome. The figures given therein are subject to the limitations previously noted in respect to horses (See § 2, 6 ante.)

CATTLE.—WORLD'S TOTALS, 1913 AND 1926.

Continents, etc.	Number at the date nearest—		Increase (+) or Decrease (–) in 1926.	
	1913.	1926.	Actual Figures.	Percentages.
	,000	,000	,000	%
Europe	137,861	139,477	+ 1,616	+ 1.2
North and Central America ..	74,336	81,467	+ 7,131	+ 9.6
South America	86,662	101,051	+14,389	+16.6
Asia	142,087	154,356	+12,269	+ 8.6
Africa	33,174	47,926	+14,752	+44.5
Oceania	13,856	15,773	+ 1,917	+13.8
Total	487,976	540,050	+52,074	+10.7

The number of cattle has increased in all continents since 1913, the most notable advances being in Africa and South America. In the latter continent the development of the cattle industry has been most marked in the Argentine Republic, the number of cattle recorded in that country increasing by more than 11,000,000 head since the pre-war year.

7. Imports and Exports of Cattle.—Although the various products of the cattle-raising industry bulk largely in the export trade of Australia, the export of live cattle has never been considerable. The number of cattle imported is also small, consisting, as in the case of horses, mainly of valuable animals for the purpose of breeding. Details are as follows:—

CATTLE.—IMPORTS AND EXPORTS, AUSTRALIA, 1922-23 TO 1926-27.

Year.	Imports.		Exports.		Net Exports.	
	No.	Value.	No.	Value.	No.	Value.
1922-23 ..	147	£ 18,856	13,965	£ 83,587	13,818	£ 64,731
1923-24 ..	2,683	46,684	2,612	15,254	-71	-31,430
1924-25 ..	70	2,318	9,744	45,946	9,674	43,628
1925-26 ..	173	15,743	10,071	48,375	9,898	32,632
1926-27 ..	103	4,412	10,196	48,075	10,093	43,663

NOTE.—The minus sign — signifies net imports.

The importation of fat cattle from New Zealand for the Melbourne market was the cause of the relatively large import in 1923-24. Omitting these unusual shipments the average value of the cattle imported during the last five years was £88 12s. 10d. per head, while the average value of the cattle exported during the same period was £5 3s. 7d. As previously stated, the imported cattle were required principally for stud purposes.

8. Cattle Slaughtered.—The number of cattle slaughtered during each of the years 1922 to 1926 is given hereunder:—

CATTLE (INCLUDING CALVES) SLAUGHTERED, 1922 TO 1926.

Year.	N.S.W. (a)	Victoria.	Q'land.	S. Aust.	W. Aust.	Tas. (a)	N. Ter.	Fed. Cap. Ter. (a)	Total.
1922	738,908	424,199	504,394	127,294	79,823	31,026	1,587	142	1,907,373
1923	752,376	461,958	566,452	147,979	90,833	33,729	2,500	113	2,048,940
1924	818,683	499,840	893,169	155,050	95,648	36,154	6,630	143	2,505,317
1925	825,628	523,960	778,060	157,210	110,286	38,824	2,000	456	2,434,424
1926	809,810	499,519	567,640	143,747	101,948	32,989	1,369	2,784	2,159,806

(a) For year ended 30th June of year following.

9. Production and Consumption of Beef.—The production of beef in Australia during the three years ended 1926-27 was estimated at 1,199,536,900 lbs. per annum. The requirements of the local market absorbed 989,603,833 lbs., approximately 82½ per cent. leaving a balance of 17½ per cent., which was exported as frozen and canned beef. The annual consumption of beef per head of population in Australia averaged 165 lbs. compared with 70 lbs. in the United States of America, 70 lbs. in Canada, and 64 lbs. in the United Kingdom for the same period.

10. Export of Beef Preserved by Cold Process.—The establishment of the frozen meat export trade about the year 1882 provided an outlet for the surplus stock of

Australia, and since that date the trade in frozen beef has grown to large proportions, the quantities exported during the five years 1922-23 to 1926-27 being as follows:—

BEEF PRESERVED BY COLD PROCESS.—EXPORTS, AUSTRALIA, 1922-23 TO 1926-27.

Country to which Exported.	1922-23.	1923-24.	1924-25.	1925-26.	1926-27.	Total for 5 years.
QUANTITY.						
	lbs.	lbs.	lbs.	lbs.	lbs.	lbs.
United Kingdom ..	112,316,545	62,286,753	175,276,049	124,287,414	64,683,188	538,849,949
Belgium ..	2,452,475	7,728,342	25,679,301	31,760,595	9,749,733	77,370,446
Italy ..	67,315	8,511,922	48,938,055	11,764,463	1,920,923	71,202,683
Germany ..	17,321,705	5,437,988	6,777,898	15,600,259	4,114,891	49,252,741
Philippine Islands ..	4,780,134	8,442,695	8,117,712	9,201,185	9,232,659	39,774,385
Egypt ..	5,228,357	3,242,520	6,406,583	4,919,222	6,592,505	26,389,187
Malta ..	1,223,563	2,007,894	3,006,897	3,987,758	3,320,951	13,547,063
Malaya (British) ..	2,215,561	1,908,621	2,012,101	2,062,674	2,211,299	10,410,256
France ..	1,802,192	625,223	2,909,841	3,262,353	341,423	8,941,032
Hawaiian Islands ..	2,089,605	230,274	996,735	2,942,684	2,287,908	8,547,206
Hong Kong ..	511,417	1,444,881	382,390	1,370,380	1,977,457	5,686,525
Gibraltar ..	353,354	1,254,888	929,137	1,432,295	813,149	4,782,823
Japan ..	398,301	884,679	981,672	450,557	1,535,490	4,250,699
Netherlands East Indies ..	849,313	378,015	254,777	368,333	401,829	2,252,267
Ceylon ..	456,739	319,546	309,781	423,357	564,347	2,078,770
Other Countries ..	884,091	459,699	611,758	251,452	2,450,339	4,687,339
Total ..	152,950,667	105,163,940	283,620,687	214,089,981	112,198,096	868,023,371
VALUE.						
	£	£	£	£	£	£
United Kingdom ..	1,285,049	734,814	2,552,775	1,915,739	916,291	7,404,668
Belgium ..	27,314	96,270	366,488	487,448	131,172	1,108,692
Italy ..	842	115,819	725,510	170,829	26,905	1,039,905
Germany ..	202,119	65,054	105,496	225,063	57,594	655,326
Philippine Islands ..	60,843	105,971	103,781	124,010	128,160	522,765
Egypt ..	67,684	45,858	93,805	80,722	100,018	394,687
Malta ..	14,265	30,658	46,872	62,753	54,095	208,643
Malaya (British) ..	34,552	28,980	32,496	33,927	38,866	168,821
Hawaiian Islands ..	28,412	3,955	16,386	46,325	38,525	183,603
France ..	21,720	7,101	44,539	45,871	4,979	124,210
Hong Kong ..	6,771	19,537	5,587	23,365	31,104	86,344
Gibraltar ..	4,214	14,853	15,458	24,997	13,213	72,735
Japan ..	5,340	12,603	10,806	4,772	20,567	54,088
Ceylon ..	8,455	6,405	5,868	8,324	11,028	40,080
Netherlands East Indies ..	14,041	7,168	3,586	5,835	7,163	37,793
Other Countries ..	13,114	6,823	10,654	4,940	42,818	77,859
Total ..	1,794,735	1,301,879	4,140,087	3,264,920	1,627,998	12,129,819

The export trade in frozen beef during 1926-27 was far from satisfactory. Owing to the drought in Queensland and depressed markets overseas beef shipments were only half those of the previous year. The largest purchaser of Australian beef is the United Kingdom, which during the five years ended 1926-27 took £7,404,668 worth, or more than 61 per cent. of the total shipments. The continental demand which had been a feature of the two previous seasons declined considerably in 1926-27. Difficulties of exchange and increases in home-grown supplies contributed to this loss of trade.

11. Beef Subsidy.—Particulars of the efforts of the Commonwealth Government to assist the beef industry by the passage of the Meat Export Bounties Act and the operations of that measure are contained in previous issues of the Year Book.

§ 4. Sheep.

1. Initiation of the Pastoral Industry.—Fortunately for Australia, the suitability of its climate and general conditions for the production of a high class of wool was, at an early date in the history of its settlement, surmised and tested by Captain Macarthur, one of the pioneer sheep-breeders of New South Wales. To the energy of this enterprising pastoralist is due in large measure the rapid and extremely satisfactory development of Australia as a producer of fine wool, and, while it would appear that the introduction of the merino sheep into Australia was not due to Macarthur, a great deal of the credit for having successfully established the pastoral industry in Australia must certainly be his.

2. Distribution throughout Australia.—With the exception of a short period in the early sixties, when the flocks of Victoria outnumbered those of the mother State, New South Wales has maintained the lead in sheep-raising which naturally attached to it as the portion of Australia in which settlement was first effected. Within its borders are contained generally one half of the flocks of Australia, and in the returns for the past two years even this high percentage was exceeded.

Fluctuations in the number of sheep recorded for each year in Australia from 1860 onwards may be seen from the graph accompanying this chapter. Five marked periods of decline depleted the numbers at successive intervals, but these gaps were as quickly restored, and, despite a decrease of 3½ millions during the drought of 1922, the number reported in 1926 was 104,267,101, the greatest number since the maximum year 1891, when 106,421,068 sheep were depastured. This development in spite of the annual slaughter of some ten to twelve million sheep and lambs for the mutton and lamb trade is a striking commentary on the soundness of the sheep and wool industry, and on the excellent seasons experienced in Australia during recent years.

Preliminary advices estimate the sheep total at 31st December, 1927, at 99,357,738. The decline was practically confined to New South Wales, where dry conditions and the requirements of other States reduced the flocks of that State by nearly 6,000,000.

The number of sheep in the several States and Territories for each year from 1922 to 1926 was as follows:—

SHEEP.—NUMBER, 1922 TO 1926.

Year.	New South Wales. (a)	Victoria.	Queensland.	South Australia.	Western Australia.	Tasmania.	Nor. Ter.	Fed. Cap. Ter. (a)	Total.
1922	98,605,391	11,765,520	17,641,071	26,305,133	6,664,135	1,558,494	6,161	154,609	82,700,514
1923	41,293,843	11,059,761	16,756,101	26,596,875	6,595,867	1,557,716	4,723	146,157	84,011,048
1924	46,934,210	12,649,898	19,028,252	6,359,240	6,396,564	1,614,085	6,914	165,790	83,154,953
1925	53,687,749	13,740,500	20,663,323	6,810,495	6,861,795	1,619,075	8,030	172,251	103,563,218
1926	55,705,923	14,919,653	16,860,772	7,283,945	7,458,766	1,807,558	6,407	224,077	104,267,101

(a) 30th June, year following.

3. Proportion in the Several States and Territories.—Particulars concerning the relative positions of the several States and Territories with respect to the total flocks of Australia during the years 1922 to 1926 are given hereunder:—

SHEEP.—PERCENTAGE IN EACH STATE, 1922 TO 1926.

Year.	N.S.W.	Victoria.	Q'land.	S. Aust.	W. Aust.	Tas.	N. Ter.	Fed. Cap. Ter.	Total.
	%	%	%	%	%	%	%	%	%
1922	46.68	14.23	21.33	7.62	8.06	1.88	0.01	0.19	100.00
1923	49.15	13.16	19.95	7.85	7.85	1.86	0.01	0.17	100.00
1924	50.38	13.58	20.42	6.83	6.87	1.73	0.01	0.18	100.00
1925	51.84	13.27	19.95	6.58	6.62	1.56	0.01	0.17	100.00
1926	53.43	14.31	16.17	6.99	7.15	1.73	0.01	0.21	100.00

Apart from the effect of drought the percentage of sheep depastured in the different States shows little change. The most noteworthy alteration was a gain of 6.75 per cent. in New South Wales mainly at the expense of Queensland.

4. Relation to Population.—The relation of the flocks of the several States and Territories to the population at the end of each year from 1922 to 1926 is as follows:—

SHEEP.—NUMBER PER HEAD OF POPULATION, 1922 TO 1926.

Year.	N.S.W.	Victoria.	Q'land.	S. Aust.	W. Aust.	Tas.	N. Ter.	Fed. Cap. Ter.	Total.
1922 ..	17.77	7.40	22.38	12.20	19.39	7.12	1.74	60.46	14.68
1923 ..	15.69	6.50	20.66	12.47	18.64	7.11	1.33	55.74	14.61
1924 ..	20.82	7.64	22.79	11.81	17.57	7.34	1.92	55.30	15.86
1925 ..	23.36	8.16	23.99	12.35	18.44	7.46	2.20	43.76	17.28
1926 ..	23.73	8.72	19.11	12.86	19.69	8.42	1.64	45.53	17.06

5. Comparison with other Countries.—As regards the size of its flocks, and the quantity and quality of wool produced, Australia has long occupied the leading position amongst the sheep-raising countries of the world. The following comparison taken mainly from the Year Book of the International Institute of Agriculture gives the latest figures relative to the number of sheep in the principal wool-producing countries:—

SHEEP.—NUMBER IN VARIOUS COUNTRIES.

Country.	Date.	No. of Sheep (,000 omitted).	Country.	Date.	No. of Sheep (,000 omitted).
Australia	1926	104,267	Jugo-Slavia	1926	7,932
Soviet Republics	1926	89,707	Algeria	1926	6,786
U.S. of America	1926	41,909	French Equatorial and West Africa	1925	6,684
India (British and Native)	1925	36,817	Greece	1923	5,643
Argentine Republic	1922	36,209	Iraq (a)	1926	5,055
Union of South Africa	1925	35,570	Tanganyika Territory(a)	1926	4,462
New Zealand	1926	24,905	Bolivia	1926	4,220
United Kingdom	1926	24,592	Chile	1925	4,094
China	1916	22,232	Germany	1926	4,080
Spain	1924	18,460	Portugal	1920	3,851
Uruguay	1924	14,443	Irish Free State	1926	3,003
Rumania	1926	13,582	Canada	1926	2,877
Italy	1919	11,754	Kenya	1926	2,756
Turkey	1926	11,702	Mexico	1926	2,381
Peru	1922	11,335	Poland	1921	2,193
France	1926	10,775	Basutoland	1926	2,100
French Morocco	1926	9,248	Sudan (Anglo-Egyptian)	1926	2,000
Bulgaria	1920	8,923			
Brazil	1920	7,933			

(a) Including goats.

6. World's Totals.—The number of sheep in the various great divisions of the world has been estimated by the International Institute of Agriculture, and a comparison has been made with pre-war estimates. In the table below the results are shown, the totals being subject to the limitations noted for other classes of live stock. (See § 2, 6 ante).

SHEEP.—WORLD'S TOTALS, 1913 AND 1926.

Continents, etc.	Number at the date nearest—		Increase (+) or Decrease (–) in 1926.	
	1913.	1926.	Actual Figures.	Percentages.
	,000	,000	,000	%
Europe	191,671	194,916	+ 3,245	+ 1.7
North and Central America	55,083	48,052	– 7,031	– 12.8
South America	100,392	81,144	– 19,248	– 19.2
Asia	57,987	66,340	+ 8,353	+ 14.4
Africa	74,260	82,288	+ 8,028	+ 10.8
Oceania	109,331	128,507	+ 19,176	+ 17.5
Total	588,724	601,247	+ 12,523	+ 2.1

Despite large reductions in the United States, Argentine, Brazil, and Uruguay the total number of sheep recorded in 1926 exceeded that depastured in the various countries during 1913. The increase was mainly due to important additions to the flocks of Australia, Africa, and Asia.

7. Oversea Imports and Exports of Sheep.—As in the case of cattle, the oversea exports of live sheep from Australia are of comparatively small importance. During the past five years the principal consignments of ordinary sheep have been made to Malaya (British) from the State of Western Australia. The purchases by South African and Japanese buyers at the Australian Stud Sheep Sales during recent years have opened up a regular export trade with these two countries in stud sheep, the bulk of which has been secured from the leading flocks of New South Wales, Victoria and South Australia. The following are particulars of the imports and exports for the years 1922-23 to 1926-27 :—

SHEEP.—IMPORTS AND EXPORTS, AUSTRALIA, 1922-23 TO 1926-27.

Year.	Imports.		Exports.		Net Exports.	
	No.	Value.	No.	Value.	No.	Value.
1922-23 ..	235	£ 3,378	38,194	£ 45,395	37,959	£ 42,017
1923-24 ..	1,021	8,487	31,323	49,374	30,302	40,887
1924-25 ..	2,183	10,902	6,326	40,695	4,143	29,793
1925-26 ..	2,375	13,873	22,706	41,831	20,331	27,958
1926-27 ..	6,951	34,595	33,169	49,985	26,218	15,390

8. Sheep Slaughtered.—The number of sheep slaughtered in the several States during each of the years from 1922 to 1926 was as follows :—

SHEEP (INCLUDING LAMBS) SLAUGHTERED, 1922 TO 1926.

Year.	N.S.W. (a)	Victoria.	Q'land.	S. Aust.	W. Aust.	Tas. (a)	Nor. Ter.	Fed. Cap. Ter.(a)	Total.
1922 ..	5,662,953	5,863,195	762,540	1,290,669	900,128	344,989	..	3,323	14,827,797
1923 ..	3,614,457	4,078,273	618,127	2,956,140	809,379	316,438	..	2,898	10,395,712
1924 ..	3,396,957	3,591,219	446,247	933,426	588,577	276,117	..	2,989	9,235,532
1925 ..	4,244,497	4,194,572	635,835	1,028,533	613,935	286,691	..	7,908	11,011,471
1926 ..	5,600,083	4,528,113	679,266	1,090,756	712,647	310,428	..	19,319	12,940,612

(a) Year ended 30th June year following.

9. Production and Consumption of Mutton and Lamb.—The annual production of mutton and lamb during the three years ended 1926-27 averaged 443,471,123 lbs., of which 363,663,709 lbs., or 82 per cent., was consumed locally, leaving a balance of 18 per cent. for exportation. The consumption of mutton and lamb in Australia during the same period averaged 61 lbs. per head per annum, a figure considerably in excess of the per capita consumption during the past three years in the following countries :—United Kingdom, 27 lbs.; Canada, 6 lbs.; and United States of America, 5½ lbs.

10. Exports of Mutton and Lamb Preserved by Cold Process.—The export trade in mutton and lamb preserved by cold process grew rapidly until in 1913, the year immediately before the war, the value of the shipments amounted to nearly £3,000,000. The exports fell away considerably during the war years, but a record shipment of 246,971,346 lbs., valued at £5,482,564, was made in 1919-20, and another large consignment was dispatched in 1922-23. Climatic conditions favoured a considerable output in the next four seasons, but shipments were not large in comparison, owing chiefly to the sound position of wool and depressed markets overseas.

As in the case of frozen beef, the principal customer in this trade is the United Kingdom, which absorbed nearly 95 per cent. of the total quantity exported from Australia during the last five years, while the balance was shipped mainly to Malaya (British), Egypt, Hong Kong, Ceylon, Canada, and Malta.

MUTTON AND LAMB PRESERVED BY COLD PROCESS.—EXPORTS, AUSTRALIA, 1922-23 TO 1926-27.

Country to which Exported.	1922-23.	1923-24.	1924-25.	1925-26.	1926-27.	Total for 5 years.
QUANTITY.						
	lbs.	lbs.	lbs.	lbs.	lbs.	lbs.
United Kingdom ..	162,653,301	35,996,594	46,025,699	80,584,284	88,056,762	413,316,640
Malaya (British) ..	1,106,778	846,641	1,072,104	994,153	1,033,736	5,053,412
Egypt ..	984,473	463,332	739,176	617,805	338,843	3,143,629
Hong Kong ..	432,250	491,660	446,076	601,292	439,373	2,410,651
Canada ..	203,315	251,046	216,121	545,043	1,229,936	2,445,461
Ceylon ..	340,484	415,729	443,937	411,241	468,406	2,079,797
Malta ..	..	..	..	707,093	642,839	1,349,932
Philippine Islands ..	208,910	184,482	167,118	154,014	135,426	849,950
Hawaiian Islands ..	..	..	..	416,307	390,705	807,012
France ..	..	..	..	342,908	514,702	857,610
Union of South Africa ..	179,226	156,102	..	..	51,770	387,098
Other Countries ..	1,503,824	999,763	1,161,231	307,830	217,656	4,190,304
Total ..	167,612,561	39,805,349	50,271,462	85,681,970	93,520,154	436,891,496

VALUE.

	£	£	£	£	£	£
United Kingdom ..	4,205,189	1,067,571	1,397,291	2,298,400	1,942,956	10,911,407
Malaya (British) ..	23,531	25,067	34,548	27,964	24,260	140,370
Egypt ..	18,825	11,021	20,781	15,226	6,067	71,920
Hong Kong ..	12,104	14,969	14,144	16,269	9,142	66,828
Canada ..	3,944	6,216	6,503	15,210	30,034	61,907
Ceylon ..	8,872	12,296	14,018	10,751	9,522	55,459
Malta ..	..	..	..	15,158	11,002	26,160
Philippine Islands ..	5,740	5,486	5,556	4,526	2,893	24,201
Hawaiian Islands ..	..	..	..	13,620	10,101	23,721
France ..	..	..	..	6,430	7,153	13,583
Union of South Africa ..	3,710	4,167	..	..	576	8,453
Other Countries ..	35,002	24,057	29,241	6,911	3,901	99,112
Total ..	4,321,917	1,170,850	1,522,082	2,430,465	2,057,607	11,502,921

§ 5. Wool.

1. **General.**—Australia is the leading wool-growing country in the world. With less than one-sixth of the world's sheep Australia produced in 1926-27 26½ per cent., or more than one-quarter of the world's supply. Her contribution was even more important as it represented one-half of the world's production of fine quality merino wool. The bulk of the production is exported, but with the greater activity of Australian woollen mills the quantity used locally is increasing, nevertheless the amount so used represents about 6 per cent. only of the total production.

2. **Value.**—Wool is the chief factor in the pastoral wealth of Australia and the Nation's prosperity is largely dependent upon the satisfactory sale of its annual wool clip. Based upon the export values of the produce of the various States the output for the season 1926-27 was valued at £74,080,000, compared with £61,633,000 in the previous year, £81,430,000, in the record price year 1924-25, and £60,878,000 the average of the previous five seasons. During the period 1921-22 to 1925-26 the export of wool averaged 45.6 per cent. of the value of the total shipments of merchandise from Australia, and in 1926-27 the ratio increased to 46.9 per cent.

3. Greasy and Scoured Wool.—For the purpose of comparing the clips as a whole for a series of years, it is convenient to have the total production expressed in terms of greasy wool.

The quantity of Australian wool scoured and washed before export during recent years has been on the average about 17 per cent. of the total quantity shipped. The loss of weight in scouring varies largely with season, locality, breed, and condition. It seems preferable to express "scoured and washed" wool in terms of "greasy" rather than vice versa, since the absolute error arising from uncertainty as to average loss of weight is thereby minimized.

In the tables dealing with production, "scoured and washed" wool has been converted into the estimated equivalent amount of "greasy" on the assumption that two and one-sixth pounds of "greasy" wool are on the average required to produce one pound of "scoured and washed."

4. Production.—(i) *Quantity.* The annual shearing of the live sheep provides the main source of Australia's wool supply, the resultant clip forming about 89 per cent. of the total production. A considerable quantity, approximately 6½ per cent. of the total output is obtained by fellmongering, or removing wool from skins of slaughtered sheep, while the remaining 4½ per cent. is an estimation of the quantity of wool exported on sheepskins. Statistics of wool production are compiled from data received from growers, fellmongers, etc. As the result of recent investigations made in some of the States serious understatements by landholders have been disclosed, and it is believed that this practice is general throughout the Commonwealth. Exhaustive inquiries have enabled the Statisticians of the States referred to satisfactorily to revise their original figures, and provisional amendments have been inserted pending similar action in the remaining States. The following table furnishes the revised figures for each State and the Commonwealth during the past five seasons:—

WOOL.—TOTAL PRODUCTION, 1922-23 TO 1926-27.

State.	1922-23.	1923-24.	1924-25.	1925-26.	1926-27.
	lbs.	lbs.	lbs.	lbs.	lbs.
New South Wales(a) ..	336,899,000	303,032,000	369,118,000	402,490,000	499,322,000
Victoria	127,467,950	107,513,361	133,484,871	139,076,017	151,624,526
Queensland.. ..	144,971,150	131,913,075	152,131,544	153,744,544	129,435,804
South Australia ..	58,698,738	57,881,936	62,438,953	69,007,266	72,365,200
Western Australia ..	45,139,138	49,055,393	44,307,052	48,547,780	59,300,023
Tasmania	12,218,550	11,712,273	12,483,452	12,564,000	12,333,000
Northern Territory(b)	20,000	20,000	20,000	30,000	30,000
Total	725,414,526	661,128,038	773,983,872	830,459,607	924,410,553

(a) Including Federal Capital Territory. (b) Approximate figures.

(ii) *Estimate for 1927-28.* Although the returns are not yet complete the total wool production of the Commonwealth during 1927-28 is officially estimated at 880,000,000 lbs., valued at approximately £74,993,000.

5. Care Needed in Comparing Clips.—In comparing successive clips, allowance must be made for the circumstance that, owing to climatic or other conditions, the time of shearing may be so far delayed that one clip may include almost thirteen months' growth of wool, while the succeeding one may include little more than eleven months' growth.

6. World's Wool Production.—The following table compiled by the Textile Division of the United States Department of Commerce shows the importance of Australia as a wool-producing country. Out of a total production of 3,479,684,000 lbs. in 1927, Australia's contribution amounted to 924,411,000 lbs., or more than 26½ per cent. of the world's supply.

WOOL(a).—WORLD'S PRODUCTION, 1909 TO 1927.

Countries.	Average Annual Pre-War Production.(b)	Production.	
		1926.	1927.(c)
North America—	lbs.	lbs.	lbs.
United States	314,110,000	311,500,000	328,137,000
Canada	11,210,000	17,182,000	18,673,000
Mexico	7,000,000	5,250,000	2,000,000
Total	332,320,000	333,932,000	348,810,000
Central America and West Indies	1,000,000	750,000	750,000
South America—			
Argentine Republic ..	358,688,000	314,840,000	331,000,000
Brazil	35,000,000	22,597,000	26,386,000
Chile	17,430,000	31,000,000	35,000,000
Peru	9,940,000	10,000,000	10,000,000
Uruguay	156,968,000	125,000,000	130,000,000
All other	9,324,000	6,400,000	20,350,000
Total	587,350,000	509,837,000	552,736,000
Europe—			
Austria	15,360,000	1,700,000	1,200,000
Belgium	1,060,000	775,000	775,000
Bulgaria	23,700,000	25,450,000	22,000,000
Czecho-Slovakia .. ..	..	3,370,000	3,370,000
Denmark	3,508,000	1,102,000	3,180,000
Estonia .. ..	..	2,396,000	2,396,000
Finland .. ..	..	5,000,000	5,000,000
France	80,688,000	47,619,000	47,447,000
Germany	52,000,000	41,710,000	38,500,000
Greece	14,000,000	14,500,000	17,500,000
Hungary	17,637,000	16,500,000	16,500,000
Iceland	1,980,000	1,433,000	(d)
Italy	55,000,000	55,800,000	55,800,000
Jugo-Slavia	25,446,000	28,727,000	37,400,000
Netherlands	3,556,000	6,173,000	3,960,000
Norway	8,160,000	5,976,000	6,232,000
Poland	7,100,000	4,500,000	4,300,000
Portugal	10,000,000	6,000,000	6,000,000
Rumania	13,228,000	57,000,000	55,000,000
Russia	320,000,000	116,000,000	237,136,000
Spain	72,000,000	105,792,000	104,500,000
Sweden	2,875,000	2,200,000	2,200,000
Switzerland	1,049,000	660,000	660,000
Turkey	28,000,000	..	..
United Kingdom	134,000,000	98,785,000	117,676,000
Irish Free State .. ..	..	14,900,000	12,845,000
All other .. ..	..	9,670,000	7,842,000
Total	890,347,000	673,738,000	809,419,000

(a) Computed on "greasy" basis. (b) Average for years 1909 to 1913 inclusive. (c) Where 1927 figures were not obtainable, an earlier figure or an unofficial estimate has been inserted. (d) Included with Denmark.

WOOL(a).—WORLD'S PRODUCTION, 1909 TO 1927—continued.

Countries.	Average Annual Pre-War Production.(b)	Production.	
		1926.	1927.(c)
	lbs.	lbs.	lbs.
Asia—			
British India	60,000,000	55,000,000	55,000,000
China	50,000,000	60,000,000	60,000,000
Persia	12,146,000	18,000,000	18,000,000
Russia in Asia	60,000,000	79,000,000	79,500,000
Turkey in Asia	90,000,000	13,000,000	11,300,000
All other	1,000,000	33,072,000	51,972,000
Total	273,146,000	258,072,000	275,772,000
Africa—			
Algeria	35,221,000	30,659,000	36,800,000
British South Africa	165,888,000	190,000,000	240,000,000
Tunis	3,735,000	5,700,000	5,700,000
Morocco	14,850,000	38,650,000	38,650,000
All other	30,000,000	5,900,000	29,250,000
Total	249,694,000	270,909,000	350,400,000
Oceania—			
Australia	741,377,000	833,739,000	924,411,000
New Zealand	198,474,000	207,801,000	202,386,000
Total	939,851,000	1,041,540,000	1,126,797,000
Total all other Countries	13,000,000	15,000,000	15,000,000
GRAND TOTAL	3,286,708,000	3,103,778,000	3,479,684,000

(a) Computed on "greasy" basis. (b) Average for years 1909 to 1913 inclusive. (c) Where 1927 figures were not obtainable, an earlier figure or an unofficial estimate has been inserted.

7. Wool Locally Used.—The quantity of wool used in the woollen and tweed mills of the various States during the past five years was approximately as follows:—

WOOL.—GREASY, USED IN LOCAL WOOLLEN, TWEED, AND TOP MILLS, 1922-23 TO 1926-27.

State.	1922-23.	1923-24.	1924-25.	1925-26.	1926-27.
	lbs.	lbs.	lbs.	lbs.	lbs.
New South Wales	16,903,380	14,547,744	12,798,722	15,332,166	15,394,828
Victoria	15,926,225	13,068,648	14,420,497	17,642,326	29,020,842
Queensland	1,358,888	1,317,521	1,102,110	2,102,482	3,373,800
South Australia	621,265	586,800	586,870		
Western Australia	1,502,060	963,369	1,931,814	3,321,213	4,337,881
Tasmania					
Total	36,311,818	30,484,082	30,790,018	38,488,187	52,127,351

The total consumption of wool in Australia cannot be accurately estimated, as particulars in respect of all wool-using establishments are not available. The figures given above, however, are furnished by the largest consumers, and reveal a steady increase during the past five years.

8. Exports of Wool.—(i) *Greasy—Quantities.* Of the total exports of wool expressed in terms of "greasy" shipped overseas during the past five years slightly more than 39 per cent. were sent to the United Kingdom, practically the same percentage as was dispatched in pre-war years. The other leading consignees since 1922-23 were France, Japan, Germany, Belgium, United States of America, and Italy, the principal continental countries taking 44½ per cent., and America and Japan 15½ per cent. of the total shipments. The following table shows for the years 1922-23 to 1926-27 the quantities of "greasy" wool exported, and the principal countries of destination:—

WOOL IN THE GREASE.—EXPORTS, AUSTRALIA, 1922-23 TO 1926-27.

Country to which Exported.	1922-23.	1923-24.	1924-25.	1925-26.	1926-27.	Total for 5 years.
	lbs.	lbs.	lbs.	lbs.	lbs.	lbs.
United Kingdom ..	259,230,707	163,169,820	175,937,327	256,078,293	211,874,803	1,066,290,950
France ..	137,742,458	121,268,001	114,676,170	224,052,949	174,426,470	772,166,048
Japan ..	50,043,561	45,455,153	53,015,265	59,595,292	78,913,977	287,023,248
Germany ..	32,940,661	31,422,309	39,595,031	65,802,691	97,808,703	267,569,395
Belgium ..	34,180,045	48,011,894	36,682,734	64,602,486	76,891,243	260,368,402
United States of America	50,234,655	31,909,668	38,501,358	61,317,978	41,446,243	223,409,902
Italy ..	28,646,259	25,143,698	28,752,441	34,173,784	28,185,823	144,902,005
Netherlands ..	3,017,462	14,091,947	2,977,389	1,472,172	1,090,882	22,649,852
India ..	296,164	1,598,944	770,543	193,292	448,275	3,307,218
Canada ..	1,184,321	697,794	483,127	461,719	338,045	3,165,006
Other Countries ..	807,697	1,196,811	876,712	1,353,614	925,744	5,159,578
Total ..	598,323,990	483,966,039	492,267,097	769,104,270	712,350,208	3,056,011,604

(ii) *Scoured and Washed—Quantities.* Similar particulars concerning the exports of "scoured and washed" wool were as follows:—

WOOL, SCOURED AND WASHED(a).—EXPORTS, AUSTRALIA, 1922-23 TO 1926-27.

Country to which Exported.	1922-23.	1923-24.	1924-25.	1925-26.	1926-27.	Total for 5 years.
	lbs.	lbs.	lbs.	lbs.	lbs.	lbs.
United Kingdom ..	75,505,841	24,664,470	27,181,826	32,481,422	30,113,626	189,947,185
France ..	13,533,782	8,451,562	5,609,547	9,452,561	10,078,990	47,126,442
Japan ..	6,435,286	5,010,121	3,462,119	6,484,570	5,002,337	26,394,433
Belgium ..	3,938,725	3,749,960	3,179,143	3,295,602	5,739,097	19,903,127
Germany ..	6,006,516	2,469,208	1,979,909	1,780,997	5,344,667	17,581,297
United States of America	4,588,736	449,143	713,661	1,087,828	305,374	7,144,742
Canada ..	823,238	582,580	441,424	506,608	320,900	2,674,750
Italy ..	1,005,988	490,020	413,878	308,318	294,957	2,513,159
Netherlands ..	577,066	957,687	18,995	28,470	..	1,582,218
India ..	13,513	233,934	212,006	8,395	1,816	469,664
Other Countries ..	345,876	297,967	448,554	601,259	534,329	2,227,985
Total ..	112,774,567	47,356,652	43,661,062	56,036,028	57,736,693	317,565,002

(a) Including "tops."

The figures for "scoured and washed wool" include tops, amounting in 1922-23 to 6,374,922 lbs., valued at £1,412,683; in 1923-24, 4,983,258 lbs., valued at £1,161,920; in 1924-25, 4,090,958 lbs., valued at £1,119,849; in 1925-26, 5,953,442 lbs., valued at £1,162,877; and in 1926-27, 4,519,357 lbs., valued at £822,713. The total exports of wool tops during the last five years amounted to 25,926,937 lbs., valued at £5,680,042 of which 22,222,426 lbs., or more than 85 per cent., were shipped to Japan.

(iii) *Total Value of Exports.* The total value of the wool exported from Australia to the principal countries during the five years under review was :—

WOOL EXPORTS.—TOTAL VALUE, AUSTRALIA, 1922-23 TO 1926-27.

Country to which Exported.	1922-23.	1923-24.	1924-25.	1925-26.	1926-27.	Total for 5 years.
	£	£	£	£	£	
United Kingdom ..	25,001,608	20,186,750	24,386,464	23,195,387	19,013,978	112,634,187
France ..	10,408,195	12,278,938	12,484,097	15,821,883	13,164,721	64,157,834
Japan ..	6,095,616	6,212,881	7,479,586	5,869,989	7,868,883	33,526,935
United States of America ..	5,618,652	4,323,239	5,926,430	6,076,012	4,080,960	26,025,293
Germany ..	3,448,031	3,576,436	4,929,589	5,034,599	7,920,677	24,909,332
Belgium ..	2,514,717	4,951,127	3,844,335	4,221,648	5,507,034	21,038,859
Italy ..	2,498,733	2,634,990	3,327,166	2,523,541	2,156,454	13,140,884
Netherlands ..	347,698	1,625,493	367,651	117,408	89,078	2,547,328
Canada ..	184,365	154,323	162,395	121,359	69,695	692,137
India ..	11,487	123,550	108,522	14,897	23,670	282,126
Other Countries ..	109,662	179,431	246,910	213,175	159,210	908,388
Total ..	57,138,764	56,197,158	63,263,145	63,209,876	60,054,360	299,863,303

9. *Average Export Value.*—The average values per pound of Australian wool according to the export returns for the year 1913 and for each of the past five years have been as follows :—

AUSTRALIAN WOOL.—EXPORT VALUE PER POUND 1913 TO 1927-28.

Description.	1913.	1923-24.	1924-25.	1925-26.	1926-27.	1927-28.
	d.	d.	d.	d.	d.	d.
Greasy ..	9.70	24.14	27.10	17.63	17.99	20.48
Scoured ..	17.27	36.03	39.81	26.57	26.25	31.87

10. *Exports and Local Sales of Wool, States, 1926-27.*—Wool selling in Australia has been developed to such a stage that practically all of the wool grown is now disposed of locally prior to export. Buyers from the United Kingdom, France, Belgium, Germany, and other European countries, also from America, Japan, China, and India, attend the sales conducted in Sydney, Albury, Melbourne, Geelong, Ballarat, Brisbane, Adelaide, Perth, Hobart, and Launceston.

The following table shows the number of bales of wool exported overseas from each State during the season ended 30th June, 1927, and the number sold in each State prior to shipment. As considerable quantities of wool grown in some States are sold in or shipped from others, the figures consequently do not show actual local production, but total overseas shipments and sales.

WOOL.—EXPORTS AND LOCAL SALES, SEASON 1926-27.

State.	Oversea Exports.		Local Sales.(a)	
	Bales.	%	Bales.	%
New South Wales ..	1,177,549	47.23	1,138,804	45.91
Victoria ..	594,079	23.83	(b)619,087	24.96
Queensland ..	321,568	12.89	316,182	12.75
South Australia ..	209,703	8.41	235,555	9.50
Western Australia ..	158,398	6.35	135,332	5.45
Tasmania ..	32,100	1.29	35,512	1.43
Total ..	2,493,397	100.00	2,480,472	100.00

(a) Including wool sold to local woollen mills, scourers, etc. Albury (N.S.W.).

(b) Including wool sold at

11. Exports and Local Sales of Wool, Australia, 1895 to 1927.—The number of bales of wool exported from Australia, and the number sold at local sales prior to shipment, or taken for local use from 1895 onwards are shown in the following table:—

WOOL.—EXPORTS AND LOCAL SALES, AUSTRALIA, 1895 TO 1927.

Year ended 30th June.			Oversea Exports.	Local Sales.(a)	Ratio of Wool sold locally to Exports.
			Bales.	Bales.	%
1895	..	..	1,595,652	817,333	51.22
1900	..	..	1,221,163	807,031	66.09
1905	..	..	1,218,969	926,940	76.04
1910	..	..	1,921,705	1,624,561	84.54
1911	..	..	1,975,378	1,642,555	83.15
1912	..	..	2,020,547	1,700,494	84.16
1913	..	..	1,718,486	1,518,650	88.37
1914	..	..	1,966,576	1,703,744	86.64
1922	..	..	2,579,484	2,226,758	86.33
1923	..	..	2,315,255	1,932,315	83.46
1924	..	..	1,708,938	1,698,141	99.37
1925	..	..	1,695,361	1,587,750	93.65
1926	..	..	2,666,473	2,655,334	99.58
1927	..	..	2,493,397	2,480,472	99.48

(a) Including wool absorbed by local woollen mills and wool-scouring establishments.

The steady development of the Australian wool market is clearly shown in this table. In the nineteen years ended 1914, the quantity sold locally more than doubled, and the ratio of wool sold locally to that exported increased from 51 per cent. in 1895 to over 86½ per cent. in the season ended 30th June, 1914. Particulars for the years 1915 to 1921 are not comparable owing to the abnormal conditions arising from the war, and have consequently been omitted. Excellent selling conditions have existed in Australia since 1922-23, and unusually high percentages of wool have been sold before shipment during each of the past four years. It should be remembered however that the ratio of sales to shipments is somewhat vitiated by the overlapping of the respective seasons, and the inclusion in the sales of wool for local consumption. As the purchases by Australian manufacturers are increasing in volume, an effort has been made to ascertain the actual percentage of wool sold prior to shipment. After eliminating the disturbing factors mentioned above the ratio of sales to shipments during the past four years averaged approximately 90 per cent.

12. Quantities of Various Descriptions of Wool Sold in Each State.—The quantities and ratios of the various descriptions of wool marketed in each State are given in the following table:—

WOOL.—LOCAL SALES, DESCRIPTIONS, 1926-27.

Description of Wool.	N.S.W.	Victoria. (a)	Q'land.	S. Aust.	W. Aust.	Tasmania.	Total.
	Bales.	Bales.	Bales.	Bales.	Bales.	Bales.	Bales.
Greasy	1,071,495	613,320	288,003	233,244	133,846	35,512	2,375,420
Scoured	67,309	5,767	28,179	2,311	1,486	..	105,052
Total	1,138,804	619,087	316,182	235,555	135,332	35,512	2,480,472
Fleece, etc.	1,080,953	578,517	305,238	218,510	124,131	34,471	2,341,820
Lambs'	57,851	40,570	10,944	17,045	11,201	1,041	138,652
Total	1,138,804	619,087	316,182	235,555	135,332	35,512	2,480,472
Merino	1,001,350	382,088	314,552	228,685	131,149	6,521	2,064,345
Crossbred and all strong breeds..	137,454	236,999	1,630	6,870	4,183	28,991	416,127
Total	1,138,804	619,087	316,182	235,555	135,332	35,512	2,480,472

(a) Including wool sold at Albury (N.S.W.).

WOOL.—LOCAL SALES, DESCRIPTIONS, 1926-27—*continued.*

Description of Wool.	N.S.W.	Victoria. (a)	Q'land.	S. Aust.	W. Aust.	Tasmania.	Total.
	%	%	%	%	%	%	%
Greasy ..	94.09	99.07	91.09	99.02	98.90	100.00	95.76
Scoured ..	5.91	0.93	8.91	0.98	1.10	..	4.24
Total ..	100.00	100.00	100.00	100.00	100.00	100.00	100.00
Fleece, etc. ..	94.92	93.45	96.54	92.76	91.72	97.07	94.41
Lambs' ..	5.08	6.55	3.46	7.24	8.28	2.93	5.59
Total ..	100.00	100.00	100.00	100.00	100.00	100.00	100.00
Merino ..	87.93	61.72	99.48	97.08	96.91	18.36	83.22
Crossbred and all strong breeds..	12.07	38.28	0.52	2.92	3.09	81.64	16.78
Total ..	100.00	100.00	100.00	100.00	100.00	100.00	100.00

(a) Including wool sold at Albury (N.S.W.).

In the following table comparisons are made between the various descriptions of wool marketed during the years 1911-12 to 1926-27 :—

WOOL.—LOCAL SALES, DESCRIPTIONS, 1911-12 to 1926-27.

Year.	Greasy.	Scoured.	Fleece, Etc.	Lambs'.	Merino.	Cross- bred.	Total Sales.
	%	%	%	%	%	%	%
1911-12 ..	91.58	8.42	94.95	5.05	81.35	18.65	100.00
1915-16 ..	88.43	11.57	95.79	4.21	78.42	21.58	100.00
1919-20 ..	85.94	14.06	94.86	5.14	66.11	33.89	100.00
1923-24 ..	94.46	5.54	95.58	4.42	80.29	19.71	100.00
1924-25 ..	96.07	3.93	94.26	5.74	81.51	18.49	100.00
1925-26 ..	96.67	3.33	93.46	6.54	82.05	17.95	100.00
1926-27 ..	95.76	4.24	94.41	5.59	83.22	16.78	100.00

A very large proportion of the wool clip is marketed in the greasy state. Buyers still show a decided preference for wool in the grease, and the proportion of such wool sold during the 1926-27 season amounted to nearly 96 per cent. Of fleece and lambs' wool, the former represented 94.41, and the latter 5.59 per cent. The class of wool produced is largely merino, which is almost exclusively grown in the northern, western, and central parts of the continent, a considerable portion of the merino wool dealt with in Victoria coming from Riverina and other parts of New South Wales. The development of the frozen mutton and lamb export trade and the resultant raising of a type of sheep suitable for both mutton and wool led to a considerable increase in the production of crossbred wool throughout Australia. The percentage of such wool sold on the total sales amounted to 18.6 per cent. in 1912, whereas, eight years later, in 1919-20, it had increased to 33.9 per cent. The accumulation of large stocks of coarse wools after the war and the consequent slump in prices induced many flock-masters to return to merino, and the percentage thereof sold in the local market increased from 66.11 in 1919-20 to 83.22 in 1926-27, while crossbred declined from 33.89 to 16.78 per cent. during the same period. The requirements of the mutton and lamb trade, and the advance of closer settlement with its preference for crossbred sheep-raising in conjunction with wheat-growing or mixed farming, will compel the maintenance of the crossbred flocks; still, the prevailing demand for fine wool at remunerative rates must influence the Australian flockmasters to concentrate in the future on the production of merino wool and its close counterparts comeback and fine crossbred.

13. Percentages of Various Descriptions of Wool Sold in each State.—The following table gives the percentage of each description of wool sold in the several States on the total sold in Australia during the season 1926-27 :—

WOOL.—LOCAL SALES, PERCENTAGES OF DESCRIPTIONS, 1926-27.

Description of Wool.	N.S.W.	Victoria.	Q'land.	S. Aust.	W. Aust.	Tasmania.	Total.
	%	%	%	%	%	%	%
Greasy ..	45.11	25.82	12.13	9.82	5.63	1.49	100.00
Scoured ..	64.07	5.49	26.82	2.20	1.42	..	100.00
Fleece, etc. ..	46.16	24.70	13.04	9.33	5.30	1.47	100.00
Lambs' ..	41.72	29.26	7.89	12.30	8.08	0.75	100.00
Merino ..	48.51	18.50	15.24	11.08	6.35	0.32	100.00
Crossbred and all strong breeds..	33.03	56.95	0.39	1.65	1.01	6.97	100.00

The bulk of the crossbred wool in Australia is grown in Victoria and the southern parts of New South Wales. Tasmania, where crossbred sheep largely predominate, comes next in order, followed by small consignments from South Australia and Western Australia. In Victoria and New South Wales a noticeable feature of the past few seasons has been a general fining-up of the medium and coarse crossbreds by the use of merino and Corriedale rams. Australian pastures and climate are naturally adapted for the growth of fine wool, and it is probable that this process of refinement will tend towards the ultimate abandonment of coarse wool-growing in Australia.

14. The Wool Market.—(i) *The 1926-27 Season.* The 1926-27 wool-selling season was marked by a sustained world-wide demand, and the results achieved challenge comparison with any previous wool year. The stabilization of values which was in evidence during the previous season continued, and prices were raised to a point more in keeping with production costs in Australia. A record clip was produced during the season, and this huge volume of wool was practically cleared under stable market conditions in a period of approximately eight months. These results were all the more remarkable when it is remembered that they were obtained in the face of very pronounced difficulties in several of the leading wool-consuming countries. It was thought that the financial crisis in France and industrial trouble in England would seriously interfere with the operations of buyers from these countries, but these obstacles to trade were eventually overcome and large parcels of wool were taken by both countries.

The 1926-27 clip, with the exception of the important production from Queensland, which State was enveloped in drought over a very wide area, was well grown, sound, of good body, style and handle. It was stronger in fibre than the previous clip, carried more condition, and generally reflected the bountiful conditions under which it was grown.

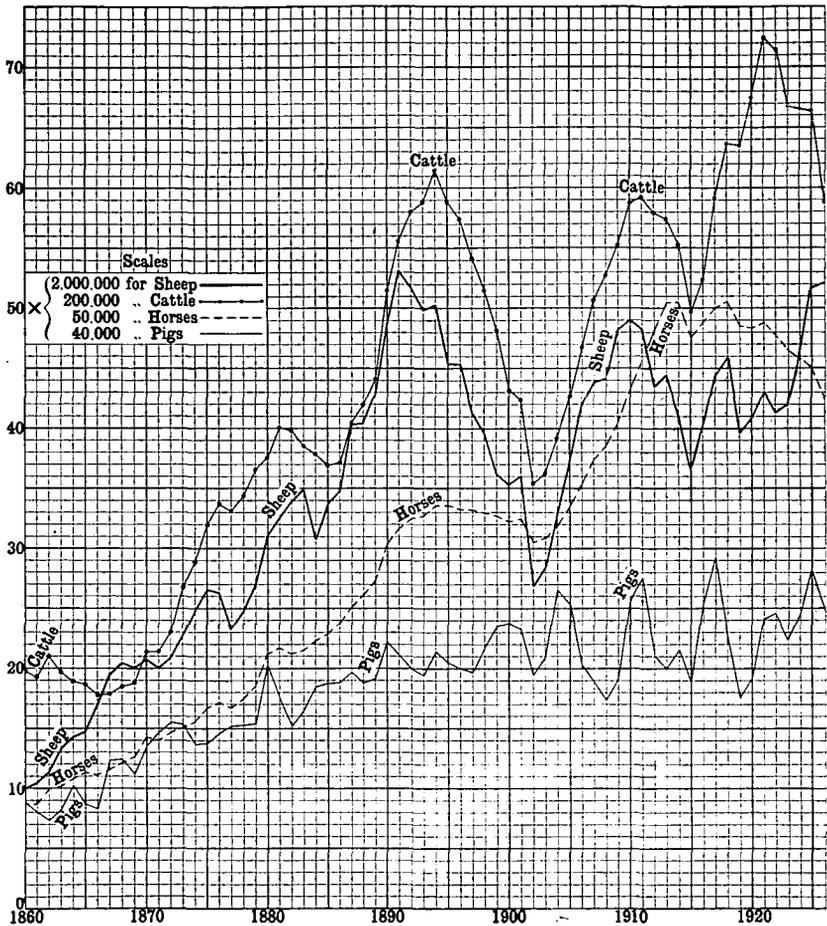
During the year the sales figures amounted to 2,480,472 bales, compared with 2,655,334 bales the previous year. In 1925-26, however, the sales were augmented by 500,000 bales of carry-over wool, whereas the sales during 1926-27 represent current production only. Values appreciated slightly during the season, the average bale realizing 13s. 8d. more than the previous year, while the aggregate sales amounted to £55,610,468, as against £57,718,015 in 1925-26.

The generous conditions under which the clip was grown were not favourable to exceptional prices, and the season's results were more satisfactory from the point of average values rather than record prices. Except in the lamb sections and scoured crossbred fleece, top prices were less than the previous year, and of course all lines were far below the outstanding figures obtained in 1924-25.

The season's record for greasy merino fleece was secured for a line of CA Wood wool sold in Tasmania, the first time in recent years that this centre has occupied so prominent a position. The Geelong market secured no less than six records, while Brisbane and Melbourne obtained three each, Sydney two, and Tasmania one.

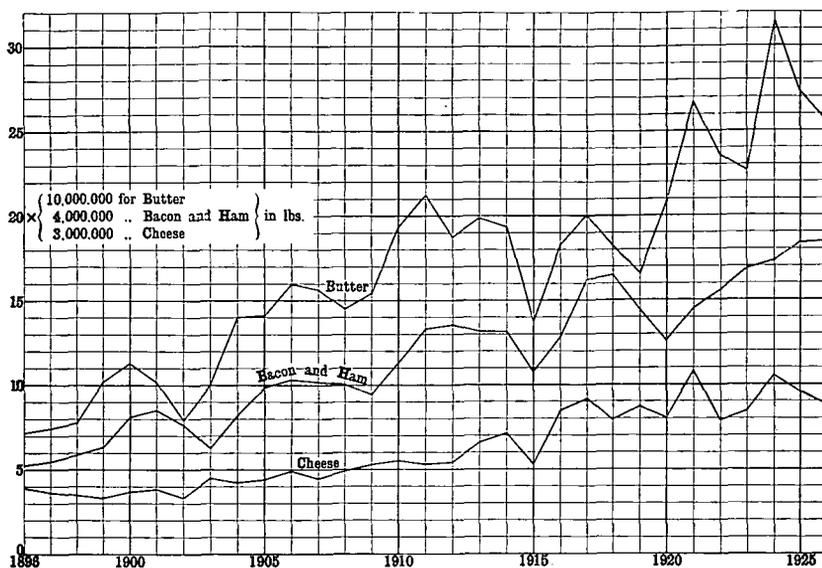
(ii) *Comparison with Pre-war Prices.* In the following table a comparison of the season's record prices is made with the previous year and with pre-war, appraisement and the highest post-war points :—

NUMBER OF HORSES, CATTLE, SHEEP, AND PIGS—AUSTRALIA, 1860 TO 1926.



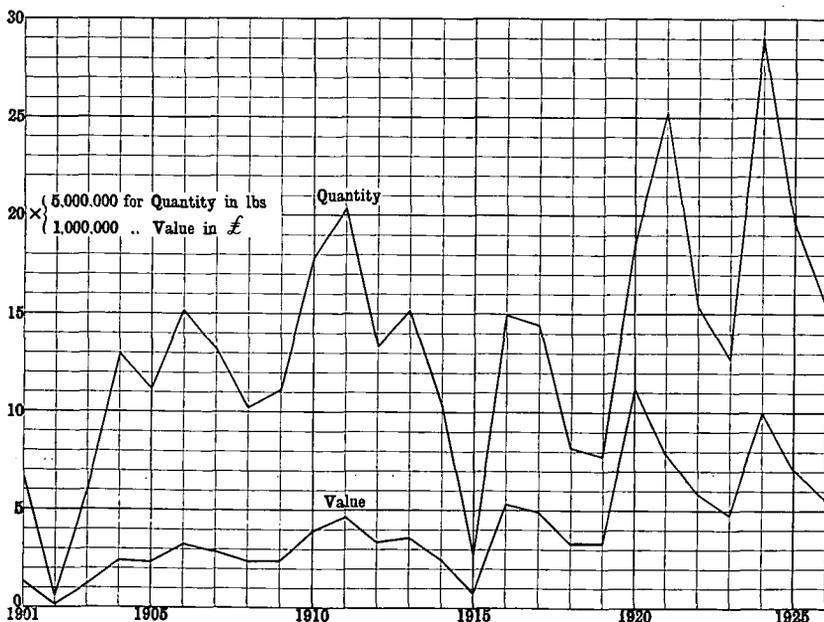
EXPLANATION.—The base of each small square represents an interval of one year, and the vertical side 2,000,000 in the case of sheep, 200,000 for cattle, 50,000 for horses, and 40,000 for pigs.

PRODUCTION OF BUTTER, CHEESE, AND BACON AND HAM—AUSTRALIA
1896 TO 1926.



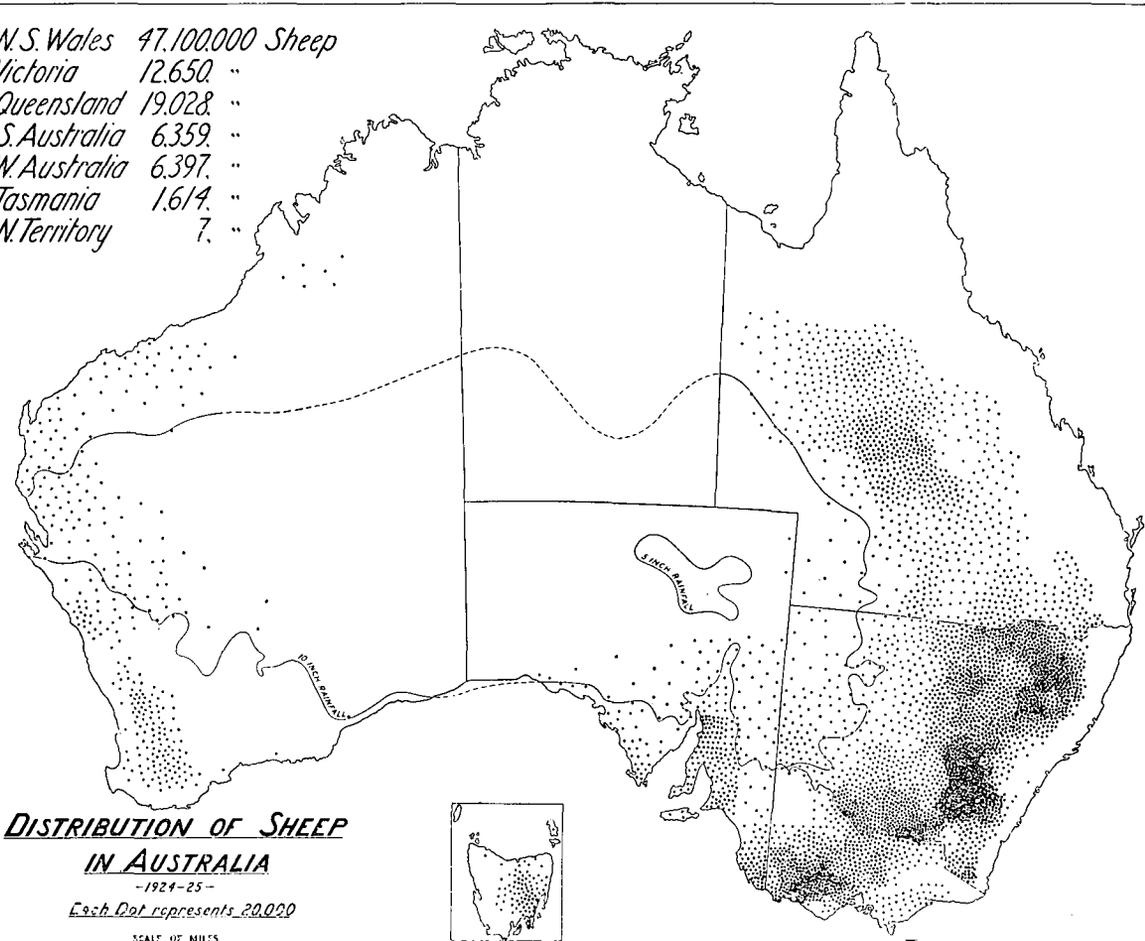
EXPLANATION.—The base of each small rectangle represents an interval of one year, and the vertical height of each denotes in the case of butter 10,000,000 lbs.; in the case of bacon and ham 4,000,000 lbs.; and in the case of cheese 3,000,000 lbs.

QUANTITY AND VALUE OF NET EXPORTS OF BUTTER FROM AUSTRALIA, 1901 TO 1926.



EXPLANATION.—The base of each small rectangle represents an interval of one year, and the vertical height of each 5,000,000 lbs. in weight, or £1,000,000 in value.

N.S. Wales 47,100,000 Sheep
Victoria 12,650,000 "
Queensland 19,028,000 "
S. Australia 6,359,000 "
W. Australia 6,397,000 "
Tasmania 1,614,000 "
N. Territory 7,000 "

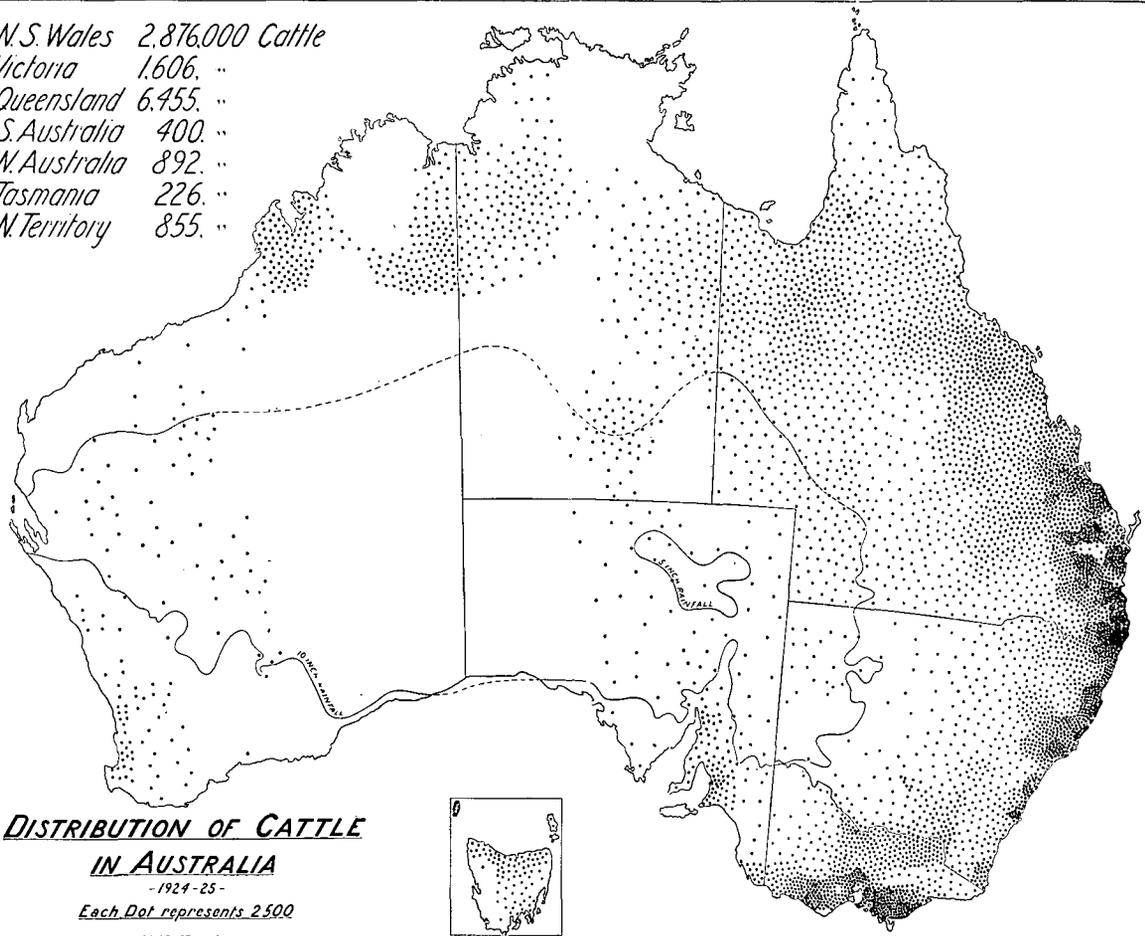


***DISTRIBUTION OF SHEEP
IN AUSTRALIA***

- 1924-25 -
Each Dot represents 20,000

SCALE OF MILES
0 100 200 300

N.S.Wales 2,876,000 Cattle
Victoria 1,606,000 ..
Queensland 6,455,000 ..
S.Australia 400,000 ..
W.Australia 892,000 ..
Tasmania 226,000 ..
N.Territory 855,000 ..

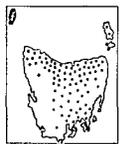


***DISTRIBUTION OF CATTLE
IN AUSTRALIA***

- 1924-25 -

Each Dot represents 2,500

SCALE OF MILES
 0 25 50 75 100



COMPARISON OF RECORD WOOL PRICES IN AUSTRALIA, 1913-14 TO 1926-27.

Description.	1913-14.	Appraisal-	1924-25.	1925-26.	1926-27.
	<i>d.</i>	ment.	<i>d.</i>	<i>d.</i>	<i>d.</i>
Greasy Merino—					
Fleece	20½	31½	53½	42½	41½
Broken	16½	27½	45½	32½	27½
Pieces	14½	26	43½	29½	26½
Bellies	13	21½	40½	26½	24½
Locks	8½	13	20½	16½	15½
Lambs	29½	27½	48½	33½	46½
Greasy Comeback—					
Fleece	16½	31	50½	34½	32½
Lambs	16½	24½	41½	26½	30
Greasy Crossbred—					
Fleece	15	29½	43½	28	27½
Lambs	16½	23½	37	23½	24½
Scoured Merino—					
Fleece	28	49	70½	48½	47
Pieces	24½	40½	63	42½	42
Lambs	23½	44	59½	39½	41
Scoured Crossbred—					
Fleece	20½	40½	45	31	32

(iii) *Record Prices.* The records secured for the principal descriptions of wool by the leading brands since 1916-17 are shown below, together with the selling centre and season of sale:—

RECORD PRICES OBTAINED FOR WOOL IN AUSTRALIAN MARKETS.
1916-17 TO 1926-27.

Description.	Price.	Brand.	Bales.	Selling Centre.	Season.
Greasy Merino :	<i>d.</i>				
Fleece ..	53½	Plains	4	Geelong ..	1924-25
Broken ..	45½	R/Carrigham ..	34	Geelong ..	1924-25
Pieces ..	43½	Ware (conj.) ..	11	Geelong ..	1924-25
Bellies ..	40½	Langi/Kal Kal ..	12	Geelong ..	1924-25
Locks ..	22½	T/Binda	1	Sydney ..	1923-24
		Wattle Grove/M ..	6	Geelong ..	1923-24
		V (reversed) over W/Pen-	5	Brisbane ..	1923-24
		lan Downs (in ½ circle)			
Lambs ..	48½	Ware (conj.) ..	1	Geelong ..	1924-25
Greasy comeback :					
Fleece ..	50½	WTA/Borook ..	8	Geelong ..	1924-25
Lambs ..	41½	North Station ..	8	Geelong ..	1924-25
Greasy crossbred :					
Fleece ..	43½	Mondilibi	4	Geelong ..	1924-25
		GR	25	Geelong ..	1924-25
		Barton	6	Tasmania ..	1924-25
Lambs ..	37	JM/Tabletop ..	3	Melbourne ..	1924-25
Scoured merino :					
Fleece ..	70½	AS in centre of double	63	Brisbane ..	1924-25
		triangle, B/Tarbrax			
Pieces ..	63	Inisfall Downs/BB ..	18	Brisbane ..	1924-25
Lambs ..	59½	Garomna	4	Brisbane ..	1924-25
Scoured crossbred :					
Fleece ..	52	Tomslake	9	Sydney ..	1923-24

Although 53½*d.* represents the highest price received for Australian greasy wool at recent Australian sales, the record price, according to "Dalgety's Annual Wool Review," for such wool in modern times was 109*d.* secured in London for the Geelong wool "NC" in February, 1920, while a line of scoured wool sold at London in March, 1920, realized 136*d.* per lb. In the early days John Macarthur sold wool at 126*d.* per lb., and in 1827 the "Sydney Gazette" contained an authentic record of Macarthur having secured 196*d.* per lb. for a single bale of the historic "J M'A" brand, sold at Garraway's Coffee House, Cornhill, London. Macarthur therefore not only played an important part in the founding of Australia's staple industry, but established a record that is still unbeaten.

(iv) *Wool Realization Scheme.* The British Australian Wool Realization Association Ltd. ("B.A.W.R.A.") was formed on the 27th January, 1921, for the purpose of realizing the large stock of wool remaining at the close of the Imperial Wool Purchase Scheme, which covered part of the 1916-17 clip and the complete clips of the three following seasons. Under the Imperial Purchase Scheme the British Government bought the whole of the Australian wool at a flat rate of 15½d. per pound, and at its termination the Australian grower had received full payment through the Central Wool Committee. The conditions of sale to the British Government contained the provision that, when wool was sold for civilian purposes, the profits therefrom should be divided equally between the British Government and the Commonwealth Government, the latter representing the growers. As all the wool had been paid for and there was a credit in cash from sales of wool and economies effected by the Central Wool Committee and some 1,836,005 bales remained unsold, there were substantial realizable profits to be divided between the two parties to the Imperial Wool Contracts. On its formation "B.A.W.R.A." automatically became the owner of half the Australian carry-over wool, and was appointed agent for the sale of the British Government's half of such Australian wools, the New Zealand and Falkland Island carry-over wools owned by the British Government, also a large quantity of Australian and New Zealand sheepskins. Towards the end of the year 1921, 80,550 bales of South African wool owned by the British Government were handed over to the Association for disposal under the Agency Agreement. "B.A.W.R.A." interests, which were transferred by the Central Wool Committee to the Association consisted of cash, wool and other assets. They were assessed and capitalized at £22,000,000; and subject to certain reservations, each supplier of Australian wool during the Imperial Purchase Scheme was allotted negotiable documents in proportion to the appraised value of the wool which he had contributed. The marketing of "B.A.W.R.A." wools was successfully carried out at various centres in England and on the Continent, and the concluding auction sale took place at Liverpool on 2nd May, 1924, when the last bale of wool carried over from the Imperial Wool Purchase Scheme was disposed of. The whole of the wool controlled by "B.A.W.R.A." was sold in three and a half years, and passed into consumption together with the current clips of the wool-growing countries.

The following statement provides a summary of the payments made to wool-growers under the Imperial Wool Purchase Scheme and of the distribution of profits accruing to growers therefrom to 31st December, 1927:—

**STATEMENT OF AMOUNTS DISTRIBUTED BY CENTRAL WOOL COMMITTEE
AND "B.A.W.R.A." TO 31st DECEMBER, 1927.**

1916—November	..	Initiation of Imperial Wool Purchase Scheme.	
1917—January 3rd	..	First appraisalment of wool.	
1920—June 30th	..	Last appraisalment of wool.	
		Total f.o.b. value of wool and sheepskins ..	£172,925,922
1920—October 27th	..	Payment by Central Wool Committee of 5 per cent. profits dividend ..	£7,653,000
1921—January	..	Formation of "B.A.W.R.A." Limited—	
		Issue of Priority Wool Certificates and Share Certificates.	
1921—July 30th	..	Payment—47½ per cent —	
		Priority Wool Certificates ..	£4,703,581
		Cash retirement of small interests and fractional payments ..	£249,697
1922—May 18th	..	Payment—52½ per cent —	
		Final payment of Priority Wool Certificates ..	£5,198,686
1923—April 14th	..	First capital reduction—	
		Payment 10s. per share ..	£5,924,018
1923—May 1st	..	Last bale of wool shipped from Australia	
1924—February 12th	..	Second capital reduction—	
		Payment 9s. per share ..	£5,331,616
1924—May 2nd	..	Last bale of wool sold in England.	
1927—November 15th	..	Final capital payment—	
		1s. per share ..	£592,402
			£22,000,000
			£202,578,922
1927—November 15th	..	First liquidation payment—	
		12s. 6d. per share ..	£7,405,026
			£209,983,948

15. **United Kingdom Importation of Wool.**—The appended statement of the quantity and value of wool imported into the United Kingdom during the year 1926 from the principal wool-producing countries shows the important position which Australia occupies in the supply of wool to the mother country :—

WOOL(a).—IMPORTS, UNITED KINGDOM, 1926.

Country from which imported.	Quantity.	Value.	Country from which imported.	Quantity.	Value.
	lbs.	£		lbs.	£
Australia ..	304,437,500	25,646,232	United States of America ..	3,376,000	282,757
New Zealand ..	183,117,700	14,844,520	Peru ..	4,224,100	265,323
Union of South Africa ..	147,741,200	10,818,911	Falkland Islands	2,722,300	174,130
Argentine Republic ..	52,887,700	3,015,680	Other British Possessions ..	2,781,200	165,349
India ..	41,393,700	2,274,731	Germany ..	1,339,500	140,877
Chile ..	25,568,300	1,763,971	Other Countries	4,703,900	234,943
France ..	14,823,400	1,675,346			
Uruguay ..	8,896,800	580,167			
Irish Free State	9,423,800	499,705			
Belgium ..	2,911,000	349,444			
			Total ..	810,348,100	62,782,086

(a) Greasy, Scoured, and Tops.

Of the importations of wool into the United Kingdom, Australian wool represented 38 per cent. of quantity and 41 per cent. of value, and New Zealand 23 per cent. of quantity and 24 per cent. of value. It is interesting to note that 691,617,400 lbs., valued at £54,423,578, were received from British Possessions, being 85 per cent. of the total weight and 87 per cent. of the total value imported.

§ 6. Trade in Hides and Skins.

1. **Extent of Trade.**—In addition to the hides and skins treated in the tanneries of the several States, a very considerable export trade is carried on, the value of Australian cattle and horse hides and sheep and other skins exported during the five years 1922-23 to 1926-27 amounting to £37,893,142, or an average of £7,578,628 per annum.

2. **Sheepskins with Wool.**—By far the largest item included in the amount mentioned in the preceding sub-section arises from the value of sheepskins with wool—the exports of which during the five years aggregated £16,800,615. France was the largest purchaser taking 47 per cent. of the total consignments, while United Kingdom ranked next with 38 per cent., and the remaining 15 per cent. was shipped principally to the United States of America and Belgium. The exports of sheepskins with wool during each of the years from 1922-23 to 1926-27 were as follows :—

SHEEPSKINS WITH WOOL.—EXPORTS, AUSTRALIA, 1922-23 TO 1926-27.

Particulars.	1922-23.	1923-24.	1924-25.	1925-26.	1926-27.	Total for 5 years.
Sheepskins (with wool) .. No.	9,610,335	7,063,988	6,245,268	5,585,054	9,152,287	40,656,932
Value .. £	2,948,489	3,111,128	3,821,837	3,509,328	3,409,833	16,800,615

3. **Sheepskins without Wool.**—In the case of sheepskins without wool the principal countries of consignment are the United States of America and the United Kingdom. These two countries were responsible for 88 per cent. of the exports during the past five years, the purchases of the United States of America alone amounting to 66 per cent. of the total shipments. Particulars concerning exports are as follows :—

SHEEPSKINS WITHOUT WOOL.—EXPORTS, AUSTRALIA, 1922-23 TO 1926-27.

Particulars.	1922-23.	1923-24.	1924-25.	1925-26.	1926-27.	Total for 5 years.
Sheepskins (with-out wool) .. No.	1,150,739	599,866	64,425	89,860	217,102	2,121,992
Value £	78,630	50,655	7,139	13,858	30,228	180,510

4. **Hides.**—(i) *Exports.* The export trade in Australian cattle hides, which fell away during the war years, has again become important. Considerable quantities were shipped oversea during each of the last five years mainly to the United Kingdom, Italy, and Germany, which countries took respectively 30, 21, and 17 per cent. of the total exports during the period. United States of America and Belgium with shipments amounting to 469,954 and 207,886 respectively were the next largest purchasers.

Particulars concerning the export of cattle hides during the past five years are as follows :—

CATTLE HIDES.—EXPORTS, AUSTRALIA, 1922-23 TO 1926-27.

Particulars.	1922-23.	1923-24.	1924-25.	1925-26.	1926-27.	Total for 5 years.
Cattle Hides .. No.	651,888	924,092	1,167,938	916,956	889,746	4,550,620
Value £	773,691	817,719	1,322,088	1,105,540	998,981	5,018,019

Calfskins exported during the years 1922-23 to 1926-27 numbered 940,137, valued at £253,820, and were shipped mainly to the United States of America, the value of the skins taken by that country averaging 60 per cent. of the total exports during the past five years. The annual export of horse hides is very small, and averaged only 3,010 hides, valued at £2,047.

(ii) *Imports.* The import trade in cattle hides and calfskins is fairly considerable, the number annually imported on the average during the past five years amounting to 491,707. New Zealand supplies the great bulk of these importations, and shipments of limited quantities are also obtained from the Pacific Islands, France, and Italy. The number and value of cattle hides, including calfskins, imported into Australia during the five years 1922-23 to 1926-27 are as follows :—

CATTLE HIDES.—IMPORTS, AUSTRALIA, 1922-23 TO 1926-27.

Particulars.	1922-23.	1923-24.	1924-25.	1925-26.	1926-27.	Total for 5 years.
Cattle Hides .. No.	675,471	480,265	456,539	474,342	371,868	2,458,535
Value £	541,079	533,539	494,501	462,066	437,932	2,469,117

The number of horse hides imported into Australia is unimportant. Imports during the last five years numbered 14,489, valued at £15,657.

5. **Other Skins.**—The oversea exports of skins other than those mentioned in the preceding sub-sections are of considerable importance. During the past five years the value of these shipments amounted to £15,708,334, or an annual average of £3,141,667. Rabbit and hare skins contributed most largely to this total, followed by opossum and kangaroo skins. The individual exports from 1922-23 to 1926-27 were as follows :—

OTHER SKINS.—EXPORTS, AUSTRALIA, 1922-23 TO 1926-27.

Particulars.	1922-23.	1923-24.	1924-25.	1925-26.	1926-27.	Total for 5 years.
	£	£	£	£	£	£
Rabbit and Hare	1,962,664	1,349,978	2,492,438	2,880,360	2,837,663	11,523,103
Opossum ..	498,184	410,660	127,774	362,406	921,833	2,320,857
Kangaroo ..	273,977	290,809	182,009	154,476	137,994	1,039,265
Fox ..	77,300	137,733	62,988	112,986	103,683	494,690
Wallaby ..	37,790	57,306	55,653	74,464	46,655	271,868
Other ..	3,833	4,086	10,912	13,320	26,400	58,551
Total ..	2,853,748	2,250,572	2,931,774	3,598,012	4,074,228	15,708,334

The destination of these skins was practically confined to the United States of America and the United Kingdom, the former country taking the bulk of the rabbit, hare, and kangaroo skins, while the fox, opossum, and wallaby skins were mainly despatched to the United Kingdom. The shipments of the various skins to these two countries during the past five years were as follows :—

OTHER SKINS.—EXPORTS TO UNITED STATES AND UNITED KINGDOM, 1922-23 TO 1926-27.

Particulars.	United Kingdom.	United States of America.
	£	£
Rabbit and Hare	2,981,861	8,033,754
Opossum	1,196,083	944,673
Kangaroo	153,196	880,619
Fox	376,099	100,311
Wallaby	242,092	25,931
Other	37,442	11,923
Total	4,986,773	9,997,211