

PASTORAL RESOURCES AND DAIRY INDUSTRY.

NOTWITHSTANDING the fact that the soil, climate, and indigenous herbage of Australasia are admirably adapted to the sustenance of animal life, no attempt was made to test the capabilities of the land as a feeding-ground for flocks and herds on a large scale until the example of Captain Macarthur had demonstrated beyond doubt that Nature favoured the production in Australasia of a quality of wool which was unsurpassed by that grown in any part of the world. Then the settlers began to understand and utilise the natural resources of the country; and as the indomitable spirit of exploration gradually opened up the apparently boundless plains of the interior, pastoralists extended their domain, and sheep and cattle in increasing numbers spread over the face of eastern Australia. Now the expansion of the pastoral industry is gradually converting the central and western portions of the continent into holdings devoted to the production of the greatest element of the wealth of Australasia.

The beginnings of pastoral enterprise in Australia were very humble. The live stock of the community which accompanied Captain Phillip comprised only 1 bull, 4 cows, 1 calf, 1 stallion, 3 mares, 3 foals, 29 sheep, 12 pigs, and a few goats; and although the whole of the present flocks and herds of Australasia have not sprung from these animals alone, yet the figures show the small scale on which the business of stock-raising was first attempted. No systematic record of the arrival of stock seems to have been kept in the early days of settlement; but it would appear that during the period between Governor Phillip's landing and the year 1800 there were some slight importations, chiefly of sheep from India. In 1800 the stock in Australasia comprised 6,124 sheep, 1,044 cattle, 203 horses, and 4,017 swine; while at the end of the year 1896 there were in these colonies no less than 111,083,519 sheep, 12,702,126 cattle, 1,926,787 horses, and 1,007,025 swine.

The following figures give the number of stock in Australasia at various dates up to 1851:—

Year.	Sheep.	Cattle.	Horses.	Swine.
1792.....	105	23	11	43
1800.....	6,124	1,044	203	4,017
1810.....	33,818	11,276	1,114	8,992
1821.....	290,158	102,939	4,564	33,906
1842.....	6,312,004	1,014,833	70,615	66,086
1851.....	17,326,021	1,921,963	166,421	121,035

The increase in the number of each kind of live stock since the year 1861 is illustrated in the following table :—

Year.	Sheep.	Cattle.	Horses.	Swine.
1861.....	23,741,706	4,039,839	459,970	362,417
1871.....	49,773,584	4,713,820	782,558	737,477
1881.....	78,063,426	8,709,628	1,249,765	903,271
1891.....	124,547,937	11,861,330	1,785,835	1,154,553
1896.....	111,083,519	12,702,126	1,926,787	1,007,025

The average number of sheep, cattle, horses, and swine per head of the population of Australasia at the same periods was as follows :—

Year.	Sheep.	Cattle.	Horses.	Swine.
1861.....	18·8	3·2	0·4	0·3
1871.....	25·3	2·4	0·4	0·4
1881.....	27·7	3·1	0·4	0·3
1891.....	31·8	3·0	0·5	0·3
1896.....	25·7	2·9	0·4	0·2

It will be seen that in 1861 there were 18·8 sheep for every person in Australasia, and that this number had increased to 31·8 in 1891. In 1896, however, in consequence of the dry seasons, and the demands made upon the flocks for the export trade, the average number had fallen to 25·7 per inhabitant. During the thirty-five years the average number of cattle depastured diminished from 3·2 to 2·9 per head. The breeding of horses and swine has about kept pace with the population.

SHEEP.

The suitability for pastoral pursuits of the land discovered in the early days was undoubtedly the means of inducing the infant colony of New South Wales to take its first step on the path of commercial progress, and, looking backward, it is not a little surprising to find how steadily some of the settlers, in the face of the almost insurmountable difficulty of transport which existed a century ago, availed themselves of the opportunities at their disposal. The importation of valuable specimens of sheep from England or the Cape of Good Hope prior to the introduction of steam was at all times attended with great risk, and it frequently happened that many of these costly animals died during the tedious voyage. These enterprises were, however, on the whole successful, and thus the flocks and herds of the colonists surely, if at first slowly, increased and multiplied.

By the year 1795, Captain Macarthur, one of the first promoters of sheep-breeding in New South Wales, had accumulated a flock of 1,000, which were held in great estimation, and gradually increased in value

until, as recorded by an entry in his journal ten years later, the market price of a fat wether had risen to £5. Not satisfied with the natural increase of his flocks, Macarthur sought to improve the quality of his fleeces, by which means he could see opening before him the promise of great wealth and the prospect of establishing important commercial relations with Great Britain. With these ends in view, he procured from the Cape of Good Hope, at great cost and trouble, a number of superior rams and ewes. A happy circumstance favoured his enterprise; for he had the good fortune to secure possession of three rams and five ewes of very fine Spanish breed, which had been presented by the King of Spain to the Dutch Government. These animals, out of a total of twenty-nine purchased at the Cape, arrived in Sydney in 1797, and were disposed of to various breeders. With the exception of Macarthur, however, those who had secured sheep of the superior breed made no attempt to follow up this advantage, being probably amply satisfied with the larger gains from the sale of an increased number of animals. Macarthur, on the other hand, thought little of present profits, and still less of breeding entirely for human consumption. He attentively watched the results of crossing his imported rams with the old stock, and by systematically selecting the finer ewes which were the offspring for further mingling with the sires, he gradually improved the strain, and in a few years obtained fleeces of very fine texture which met with the ready appreciation of English manufacturers. It has been asserted that Macarthur was not the first to introduce merino sheep into Australia; but whether this be so or not, there is no doubt that to him is due the credit of having been the first to prove that the production of fine wool could be made a profitable industry in New South Wales.

Prior to the present century the production of the finest wool had been confined chiefly to Spain, and woollen manufactures were necessarily carried on in England upon a somewhat limited scale, which was not likely to improve in face of certain restrictions which the operatives endeavoured to place upon their employers. These men, in support of their contention that the woollen trade could not be expanded on account of the limited supply of raw material, argued that fine wool was obtainable only in Spain; and it was at this favourable period that Macarthur arrived in England with specimens of the wool obtained from his finest sheep, conclusively proving the capabilities of Australia as a wool-producing country. In this way he opened up with English manufacturers a small trade which, as Australasian wool rose in public estimation, gradually increased until it reached its present enormous dimensions. During his visit to England, Macarthur purchased an additional stock of ten rams and ewes of the noted Spanish breed, nearly equal in quality to those which in 1797 he had procured from the Cape of Good Hope. That these animals were the finest obtainable in Europe may be gathered from the fact they also had formed portion of a present from the King of Spain to George III. After his return to New South Wales, Macarthur patiently continued for many years the process of selection, with such

success that in 1858, when his flock was finally dispersed, it was estimated that his superior ewes numbered fully 1,000. Victoria secured a considerable portion of his flock, and the process of breeding proceeded simultaneously in that and other adjacent colonies.

Although the increase in the numbers of the finer sheep was satisfactory, yet the importation of superior stock was not discontinued, and the stock of the colonies was augmented in 1823 and 1825 by the further introduction of Spanish sheep. Sheep-breeding was about this period commenced in the Mudgee district of New South Wales; the climate of that region had a more favourable effect upon the quality of the fleeces than that of any other part of the colony, and it was thence that the finest merinos were for a long time procured. As was to be expected, the climate has in some respects changed the character of the Spanish fleece. The wool has become softer and more elastic, and while it has diminished in density it has increased in length, so that the weight of the fleece has only slightly altered. Thus, on the whole, the quality of the wool has improved under the beneficial influence of the climate, and if no further enhancement of its intrinsic value can be reasonably hoped for, there is at least every reason to believe that Australasian wool will maintain its present high standard of excellence.

The following table shows the number of sheep in each colony at the close of the years 1861 and 1896; also the annual increase per cent. in comparison with that of the population. In Victoria no live stock returns were collected in 1895 and 1896, and the figures for that colony therefore refer to the year 1894:—

Colony.	Number of Sheep.		Annual Increase per cent. from 1861 to 1896.	
	1861.	1896.	Sheep.	Population.
New South Wales	5,615,054	48,318,790	6·34	3·75
Victoria	6,239,258	13,180,943	2·16	2·24
Queensland	4,093,381	19,593,696	4·57	7·77
South Australia	3,038,356	6,402,593	2·15	3·03
Western Australia.....	279,576	2,248,976	6·14	6·41
Tasmania	1,714,498	1,650,567	*0·11	1·76
New Zealand	2,761,583	19,687,954	5·77	5·81
Australasia	23,741,706	111,083,519	4·51	3·57

* Decrease.

In Tasmania alone has the business of sheep-breeding decreased since 1861; yet the colony is singularly well adapted for sheep raising, and its stud flocks are well known and annually drawn upon to improve the breed of sheep in the other colonies. In all the other provinces there has been a material increase in the number of the flocks, although in New South Wales only has the advance been proportionately greater

than the population. There has been a very substantial increase in the number of sheep depastured in New Zealand, Western Australia, and Queensland during the period of thirty-five years, but the population has grown even more rapidly. In South Australia the area adapted to sheep is limited, and no great expansion in sheep-farming can be looked for. As regards Victoria, the important strides made by that province in agriculture and kindred pursuits afford sufficient explanation of the slow rate at which its flocks are increasing. The statement given below shows the proportion of sheep in each colony to the total flocks of Australasia. In 1861, out of every 100 sheep, New South Wales depastured 23·7, while in 1896 its proportion had increased to 43·5, or little short of half the total flocks. In the latter year New Zealand came second, with 17·7 per cent, closely followed by Queensland with 17·6 per cent. Western Australia is the only other colony where the proportion of sheep depastured to the total number in Australasia was higher in 1896 than in 1861 :—

Colony.	1861.	1896.
	per cent.	per cent.
New South Wales	23·7	43·5
Victoria	26·3	11·9
Queensland	17·2	17·6
South Australia	12·8	5·8
Western Australia	1·2	2·0
Tasmania	7·2	1·5
New Zealand	11·6	17·7
Australasia	100·0	100·0

In order to show the increase or decrease in sheep during the last ten years, the following table has been prepared, giving the numbers in the various colonies at the end of each year since 1887. It will be seen that returns were not collected in some years in Victoria, South Australia, and New Zealand, and that the figures for those provinces are therefore incomplete :—

Year.	New South Wales.	Victoria.	Queensland.	South Australia.	Western Australia.	Tasmania.	New Zealand.
1887	46,965,152	10,623,065	12,026,153	*	1,909,940	1,547,242	*
1888	46,503,469	10,813,575	13,444,005	*	2,112,302	1,430,065	15,468,860
1889	50,106,768	10,882,291	14,470,065	6,432,401	2,366,681	1,551,429	15,503,263
1890	55,089,431	12,692,843	18,007,234	7,050,544	2,524,913	1,619,256	18,128,186
1891	61,831,416	12,928,148	20,289,633	7,745,541	1,962,212	1,064,218	18,570,752
1892	68,080,114	12,965,306	21,703,310	7,209,500	1,685,500	1,623,338	19,380,369
1893	66,980,683	13,098,725	18,697,015	7,325,003	2,200,642	1,535,047	20,230,829
1894	56,977,270	13,180,943	19,587,691	*	2,132,311	1,727,200	19,826,604
1895	47,617,687	*	19,856,959	*	2,295,832	1,523,346	19,138,493
1896	48,318,790	*	19,593,696	6,402,593	2,248,976	1,659,567	19,687,954

* Returns not collected.

The total number of sheep slaughtered in New South Wales and Victoria during the five years ended 1896 is shown below. These are the only colonies for which it is possible to give complete slaughtering returns :—

Year.	New South Wales.	Victoria.
1892	3,456,182	2,439,026
1893	8,034,108	2,491,867
1894	8,252,878	2,125,149
1895	8,363,003	2,326,002
1896	6,196,749	2,559,088

The value of the sheep depastured in Australasia, on the basis of the average prices ruling in 1897, was £46,665,000, thus distributed among the various provinces :—

	£
New South Wales	18,724,000
Victoria	6,590,000
Queensland	6,613,000
South Australia	3,426,000
Western Australia	1,546,000
Tasmania	660,000
New Zealand	9,106,000
Australasia	£46,665,000

CATTLE.

Except in Queensland, cattle-breeding in the Australasian colonies is secondary to that of sheep. Indeed, in New South Wales in 1896 the number of the herds was even less than in 1861, the decrease amounting to 45,760, equivalent to 0·06 per cent. per annum, while during the period of thirty-five years population increased at the rate of 3·75 annually. The lowest point was reached in 1885, when the herds only numbered 1,317,315, the result partly of continuous bad seasons, but principally of the more profitable character of sheep-farming, which had induced graziers on many runs to substitute sheep for cattle. From that period there has been a gradual although small improvement, which has seemed to indicate a disposition on the part of pastoralists in some parts of the colony to devote more attention to cattle-breeding. The number of cattle in the province in 1861 was exceeded, but the droughts experienced during the last two seasons have reduced the herds to their present proportions. The progress of Victoria in the breeding

of cattle has been steady ; but although the total number was nearly three times as great in 1896 as it was thirty-five years before, the position occupied by the colony in relation to the other provinces remained much the same as in 1861. Queensland has largely increased its herds, and now possesses 51·2 per cent. of the total cattle of the whole group. New Zealand and Western Australia show decided improvement, the annual rate of increase in those colonies being nearly equal to that of sheep.

The following table shows the number of cattle in 1861 and 1896, with the yearly increase per cent. during the intervening period, as well as the rate of growth of the population. The figures for Victoria refer to 1894—the last year for which returns were collected :—

Colony.	Number of Cattle.		Annual Increase per cent. 1861-1896.	
	1861.	1896.	Cattle.	Population.
New South Wales.....	2,271,923	2,226,163	0·06	3·75
Victoria	628,092	1,833,900	3·11	2·24
Queensland.....	560,196	6,507,377	7·26	7·77
South Australia.....	265,434	638,591	2·54	3·03
Western Australia	33,795	199,793	5·21	6·41
Tasmania	87,114	157,730	1·71	1·76
New Zealand	193,285	1,138,572	5·20	5·81
Australasia.....	4,039,839	12,702,126	3·33	3·57

* Decrease.

The previous table shows the growth in the number of cattle during the period extending from 1861 to 1896. A more detailed comparison for recent years is afforded by the next table, showing the number in each colony at the close of each year since 1887. As will be seen, returns were not collected in three of the provinces—Victoria, South Australia, and New Zealand—for several years under review :—

Year.	New South Wales.	Victoria.	Queensland.	South Australia.	Western Australia.	Tasmania.	New Zealand.
1887	1,575,487	1,333,873	4,473,716	*	93,544	147,092	*
1888	1,622,007	1,370,060	4,654,932	*	95,822	142,019	853,358
1889	1,741,502	1,394,209	4,872,416	531,296	119,571	150,004	895,461
1890	2,001,229	1,782,881	5,558,264	574,032	130,070	162,440	831,831
1891	2,128,838	1,812,104	6,192,759	678,933	133,690	167,788	*
1892	2,221,459	1,824,704	6,591,416	631,522	162,886	170,085	851,801
1893	2,269,852	1,817,291	6,693,200	675,234	173,747	169,141	885,305
1894	2,465,411	1,833,900	7,012,997	*	187,214	177,038	964,034
1895	2,150,057	*	6,822,401	*	200,091	162,801	1,047,901
1896	2,226,163	*	6,507,377	638,591	199,793	157,730	1,138,572

* Returns not collected.

The number of cattle slaughtered in New South Wales and Victoria during each of the five years ended 1896 is shown in the following table. These are the only colonies for which complete information regarding the slaughter of live stock is available :—

Year.	New South Wales.	Victoria.
1892	338,598	245,919
1893	332,956	227,043
1894	346,302	229,421
1895	388,097	236,317
1896	351,246	245,477

The value of the cattle in Australasia, on the basis of the average prices ruling in 1897, was £53,646,000, thus divided amongst the various provinces :—

	£
New South Wales	10,296,000
Victoria	13,479,000
Queensland.....	19,197,000
South Australia.....	2,940,000
Western Australia	1,702,000
Tasmania	1,252,000
New Zealand.....	4,780,000
Australasia	£53,646,000

HORSES.

Australasia is eminently fitted for the breeding of most descriptions of horses, and attention has long been directed to this industry. At an early period the stock of colonial-bred horses was enriched by the importation of some excellent thoroughbred Arabians from India, and to this cause the high name which was acquired by the horses of Australia was largely due. The abundance of good pasture everywhere obtainable also contributed to this result. The native kangaroo-grass, especially when in seed, is full of saccharine matter, and young stock thrive excellently upon it. This abundance of natural provender permitted a large increase in the stock of the settlers, which would have been of great advantage had it not been that the general cheapness of horses led to a neglect of the canons of breeding. In consequence of the discovery of gold, horses became very high priced. Under ordinary conditions this circumstance would have been favourable to breeding, and such was actually the case in Victoria. In New South Wales, however, it was far otherwise. The best of its stock, including a large proportion of the

most valuable breeding mares, was taken by Victoria, with the result that for twenty years after the gold rush the horses of the mother colony greatly deteriorated. One class of stock only escaped—the thoroughbred racer, which was probably improved both by the importation of fresh stock from England, and by the judicious selection of mares.

The colonies are specially adapted to the breeding of saddle and light-harness horses, and it is doubtful whether these particular breeds of Australasian horses are anywhere surpassed. The bush horse is hardy and swift, and capable of making very long and rapid journeys when fed only on the ordinary herbage of the country; and in times of drought, when the grass and water have become scanty, these animals often perform astonishing feats of endurance. Generally speaking, the breed is improving, owing to the introduction of superior stud horses and the breeding from good mares. Where there has been a deterioration in the stock, it has been due to breeding from weedy mares for racing purposes and to the effects of drought.

Although the demand in India is fair, and Australia is a natural market from which supplies may be derived, the speculation of sending horses there is one open to many risks, as, apart from the dangers of the voyage, there is always an uncertainty as to the stock being accepted. Owing, therefore, to the limited foreign demand, it has not been found advantageous to breed horses except for local requirements.

The following table shows the number of horses in each colony at the end of 1861 and 1896, also the proportion to the total at each period. In 1861 New South Wales possessed 50·7 per cent. of all the horses in Australasia, Victoria being second, with 18·3 per cent. In 1896 New South Wales still held the leading position as regards numbers, but its proportion to the whole had fallen to 26·5 per cent. Queensland and New Zealand exhibit relatively the most progress, having increased their respective proportions from 6·3 and 6·2 per cent. in 1861 to 23·5 and 13·0 per cent. in 1896:—

Colony.	Number of Horses.		Percentage of each colony to total of Australasia.	
	1861.	1896.	1861.	1896.
New South Wales.....	233,220	510,636	50·7	26·5
Victoria	84,057	431,547	18·3	22·4
Queensland.....	28,983	452,207	6·3	23·5
South Australia.....	52,597	195,591	11·4	10·1
Western Australia.....	10,720	57,527	2·3	3·0
Tasmania	22,118	29,547	4·8	1·5
New Zealand	28,275	249,732	6·2	13·0
Australasia	459,970	1,926,787	100·0	100·0

* 1894 figures; returns not collected for 1895 or 1896.

The value of horses in the various colonies is estimated as follows :—

	£
New South Wales	3,881,000
Victoria	3,539,000
Queensland	2,894,000
South Australia	1,432,000
Western Australia	460,000
Tasmania	189,000
New Zealand	2,148,000
Australasia.....	£14,543,000

THE FLOCKS AND HERDS OF THE WORLD.

The following table gives the flocks and herds of each of the great divisions of the globe. The returns are the latest available, and, with the exception of those for Australasia, are based on figures given in the report of the Statistician to the American Department of Agriculture :—

Continent.	Sheep.	Cattle.	Horses.	Swine.
Europe	187,144,000	104,430,000	36,483,000	49,164,000
Asia	39,922,000	60,847,000	4,279,000	489,000
Africa	35,589,000	6,095,000	1,239,000	547,000
America ..	147,535,000	115,497,000	23,203,000	50,783,000
Australasia*	111,101,000	12,843,000	1,933,000	1,043,000
Total.....	521,291,000	299,712,000	67,137,000	102,026,000

* Including Pacific Islands.

STOCK-CARRYING CAPACITY OF AUSTRALASIA.

None of the colonies is stocked to its full capacity ; indeed, in the large territory of Western Australia and in the Northern Territory of South Australia the process has only begun. A clear idea of the comparative extent to which each colony is stocked cannot be given unless the different kinds of animals are reduced to a common value. Assuming, therefore, that one head of large stock is equivalent to ten sheep, and expressing cattle and horses in terms of sheep, it will be found that the number of acres to a sheep in each colony is as follows :—

Colony.	No. of acres per sheep.
New South Wales	2·6
Victoria.....	1·6
Queensland	4·8
South Australia	39·2
Western Australia	129·5
Tasmania	4·8
New Zealand	2·0
Australasia	7·6

The most closely-stocked colony is Victoria, with 1·6 acres per sheep, but this is by no means the limit to the carrying-capacity of that province; on the contrary, there is still a considerable tract to be brought under the sway of the pastoralist. Neither New Zealand nor New South Wales, with 2·0 and 2·6 acres per sheep respectively, can be said to have reached its full carrying-capacity. If the present average of New South Wales be taken as the possible limit to which Australasia may be stocked, then there is room in these colonies for nearly 500 million sheep or 50 million cattle more than are now depastured. That Australasia could carry 1 sheep to 2·6 acres, however, is an improbable supposition; in almost every colony the best land is under occupation, and the demands of the farmer must diminish the area at present at the disposal of the grazier. This will more especially prove true of Victoria, New Zealand, and Tasmania. On the other hand, by resisting the temptation to overstock inferior country, and by increasing the natural carrying-capacity by water conservation and irrigation and by the artificial cultivation of grasses, the colonies in which agriculture has made most progress will be able to carry stock in even larger numbers than they have hitherto attempted. Taking all circumstances into consideration, it may be fairly estimated that under the present system the colonies are capable of maintaining, in ordinary seasons, stock equivalent to 390,000,000 sheep—that is, about 133,000,000 sheep, or their equivalent in cattle, more than are now depastured.

The number of stock in Australasia, expressed in terms of sheep, the number of acres per sheep, and the number of sheep per head of population, at various dates since 1861, were as given below:—

Year.	Sheep.	Cattle, in terms of Sheep.	Horses, in terms of Sheep.	Total.	Acres per Sheep.	Sheep per head of Population.
1861	23,741,706	40,398,390	4,599,700	68,739,796	28·7	54·3
1871	49,773,584	47,138,200	7,825,580	104,737,364	18·8	53·2
1881	78,063,426	87,096,280	12,497,650	177,657,356	11·1	62·9
1891	124,547,937	118,613,300	17,858,350	261,019,587	7·5	67·4
1896	111,083,519	127,021,260	19,267,870	257,372,649	7·6	59·5

VALUE OF PASTORAL PROPERTY AND PRODUCTION.

The total value of pastoral property in Australasia—that is, of improvements, plant, and stock—was estimated in 1897 at £237,438,000, and of this large sum £72,006,000, or nearly one-third, belonged to New South Wales. In that amount the value of stock alone (excluding swine) comes to about £114,854,000. No account is taken of the value of land devoted to pastoral purposes, for though much purchased land

is used for depasturing stock, the larger area comprises lands leased from the State, so that a statement which omitted to take into account the value of the State lands would be misleading. The annual return from pastoral pursuits in 1896-7 was £35,150,000, the share of each colony in the total production being as follows :—

New South Wales	£13,237,000
Victoria	5,693,000
Queensland	5,943,000
South Australia.....	2,061,000
Western Australia	679,000
Tasmania	603,000
New Zealand	6,934,000
<hr/>	
Australasia	£35,150,000

The products of dairy cattle and swine are not included in the foregoing statement, the figures being given in another place. It should be understood that the values quoted are those at the place of production. The value of the return from each class of stock may be approximately reckoned as follows :—

Sheep.....	£26,130,000
Cattle	6,402,000
Horses	2,618,000
<hr/>	
Total	£35,150,000

As might be supposed, the greater part of the value of stock returns is due to wool. Thus, out of the £35,150,000 quoted above, £19,664,000 is the value of wool, viz.:—£19,363,600 for wool exported, and £300,400 for wool used locally. The wool export of the Australasian colonies during 1896 was 677,367,027 lb., weighed in the grease, and the quantity used locally 10,015,546 lb., making the total clip 687,382,573 lb. The value of the exports, according to the Customs returns, was £20,627,000—that is to say, £1,263,400 more than the figures shown above. The excess represents the cost of freight, handling, and brokerage between the sheep-walks and the port of shipment.

The quantity and value of the wool clip in the grease is given for each colony in the subjoined table for the years 1881 and 1896. The value of the clip of the latter year in Victoria, South Australia, Western Australia, and Tasmania does not compare favourably with that of 1881; but all the colonies show an improvement in the quantity of the clip, this increase being relatively greatest in Queensland, Western Australia, New Zealand, and New South Wales. New South Wales maintains its high position as a wool producer; and it cannot be denied

that in New Zealand sheep-breeding is a flourishing concern, the flocks having increased by more than one-fourth during the last ten years in spite of the heavy demands upon the resources of the province for the supply of stock to meet the requirements of the London market in frozen mutton :—

Colony.	Weight of clip in grease.		Values.	
	1881.	1896.	1881.	1896.
	lb	lb	£	£
New South Wales	157,881,700	303,061,122	7,187,700	8,817,877
Victoria.....	58,832,500	71,455,561	2,562,800	2,180,763
Queensland	32,532,500	100,732,118	1,331,900	2,709,056
South Australia	46,328,200	48,061,550	1,573,300	1,097,807
Western Australia	4,107,000	11,461,346	256,700	240,756
Tasmania	8,269,700	9,182,083	498,400	288,051
New Zealand	70,787,000	143,428,793	2,910,600	4,329,748
Australasia.....	378,738,600	687,382,573	16,321,400	19,664,058

According to returns prepared in London, the number of bales of Australasian wool imported into Europe and America during the year 1896 was 1,846,000, which were valued at £12 per bale, giving a total of £22,152,000. The average price per bale in Sydney during the season 1896-7 was £10 5s. In comparing these prices, it must be remembered that not only have freight and charges to be added to the Australian value, but some allowance must be made for the difference in the quality and condition of the wool dealt with in the Australian markets and in London. Large quantities of the inferior portions of the clip intended for sale in the London market are scoured prior to shipment, and the London price is therefore raised to an average considerably higher than the Sydney or Melbourne price with freight and charges added. Similar returns for the year 1897 show the imports into Europe and America as 1,834,000 bales, valued at £21,091,000—a decrease of 10s. per bale on the 1896 prices, a fall which, although apparently not large, is still heavy enough, considering the low range of prices and the diminished production consequent upon a destructive drought.

The price per lb. obtained for wool in grease in London at the end of each year from 1890 was as follows :—

Year.	New South Wales. (Average Merino).	Victoria. (Good Average Merino.)	New Zealand. (Average Cross-bred.)
	d.	d.	d.
1890	8½	10	10
1891	7½	9	9½
1892	7	8½	9½
1893	7	8½	9½
1894	6	7½	8½
1895	7½	9½	9½
1896	7	9	8½
1897	7½	9	8

Taking the nine years beginning with 1889, the highest prices realised were obtained during the first year, namely, 11d. for New South Wales, 13d. for Victoria, and 11½d. for New Zealand ; while the lowest prices—6d. for New South Wales, 7½d. for Victoria, and 8d. for New Zealand—were experienced in 1895. The average prices realised during the whole period were 8½d. per lb. for New South Wales average merino, 10¼d. for good average Victorian merino, and 9¾d. for average New Zealand cross-bred. From these figures it will be evident that Victorian wool averages about 1¾d. per lb. higher than New South Wales wool. The figures must be taken with qualification. Much of the New South Wales wool, the product of the Riverina districts, is exported *via* Melbourne and sold as Port Phillip wool, and brings a price considerably in excess of the average given in the table for the colony of which it is the produce. The quantity of wool sold at the local sales in the Australasian colonies is increasing. Particulars of these sales will be found in the chapter on "Commerce."

THE FROZEN-MEAT TRADE.

In view of the large increase in the live stock of Australasia, the question of the disposal of the surplus cast has become a matter of serious consequence. In New South Wales especially, and in the Riverina district in particular, it was found necessary to have recourse to the old method of boiling down, which a fortunate rise in the price of tallow made it possible to carry on with a margin of profit ; but with such prices as have ruled for tallow during the past few years it cannot be said that boiling-down offers any inducement to the pastoralist, although in 1896 the production of tallow in the colony reached the large quantity of 570,983 cwt. In New Zealand a much better solution of the question of disposal of the surplus cast was found, and a trade in

frozen mutton with the United Kingdom has been established on a thoroughly payable basis—an example which some of the other colonies are endeavouring to follow, although considerably handicapped by the want of cross-bred sheep and the prejudice of the English consumer against merino mutton.

The first successful attempt at shipping frozen mutton to England was made in New Zealand in 1882, and since then the trade has attained great proportions, to the immediate benefit of the Colonial producer as well as the English consumer. The trade initiated by the New Zealand Land Company has been extended by the formation of numerous joint stock companies, which now own twenty-one meat-freezing works in the two islands, having an aggregate capacity for freezing about 4,000,000 sheep per year. The sheep are generally killed up country, and transported by rail to the freezing works. Several fleets of steamers are engaged in the trade, and the freight rates charged enable the companies to realise satisfactory profits. The growth of the frozen and preserved meat industries of New Zealand since 1881 is shown in the following table. The shipments are almost exclusively made to the United Kingdom :—

Year.	Frozen or Chilled Meat.						Preserved Meat.	
	Beef.	Mutton.	Lamb.	Mutton and Lamb.	Total Weight.	Total Value.	Weight.	Value.
	cwt.	carcases.	carcases.	cwt.	cwt.	£	lb.	£
1881	....	.....	.....	.....	.....	.....	1,074,640	22,391
1882	....	.....	.....	.....	15,244	19,339	2,913,904	54,397
1883	937	.....	.....	86,995	87,932	118,261	3,868,480	72,778
1884	1,644	.....	.....	252,422	254,066	345,081	3,103,744	59,224
1885	9,170	.....	.....	286,961	296,131	373,326	4,047,904	81,401
1886	9,391	.....	.....	336,405	345,796	420,556	2,592,464	47,426
1887	6,630	656,823	110,816	421,405	428,035	454,942	4,706,016	79,246
1888	44,613	885,843	94,681	507,306	551,919	629,110	4,912,544	86,128
1889	68,298	990,480	118,794	588,524	656,822	783,374	5,325,152	106,772
1890	98,234	1,330,176	279,741	708,625	806,859	1,064,992	6,702,752	136,182
1891	103,007	1,447,583	338,344	889,012	992,019	1,185,122	5,447,904	111,133
1892	55,020	1,316,758	290,996	806,304	861,324	1,021,838	3,939,712	69,420
1893	11,059	1,355,247	475,365	888,455	899,514	1,078,427	2,656,416	46,601
1894	912	1,633,213	459,948	1,001,342	1,002,254	1,162,770	3,368,736	57,325
1895	12,090	1,632,590	735,254	1,078,640	1,090,730	1,214,778	4,124,400	60,137
1896	25,905	1,505,969	792,037	1,065,292	1,091,197	1,239,969	5,006,848	75,661
1897	50,044	1,653,170	1,038,316	1,291,582	1,341,626	1,512,286	5,046,216	78,235

Amongst the continental colonies the export of meat has reached the largest dimensions in Queensland, although of course it consists chiefly of beef, the trade in mutton only forming one-eighteenth of

the whole. So far as they can be given, the figures showing the growth of the Queensland frozen-meat trade, as well as the exports of preserved meat, will be found below :—

Year.	Frozen or Chilled Meat.				Preserved Meat.	
	Beef.	Mutton.	Total Weight.	Total Value.	Weight.	Value.
	cwt.	cwt.	cwt.	£	lb.	£
1881	.....	.....	.....	.....	2,276,409	39,956
1882	.....	.....	.....	.....	5,689,189	119,343
1883	.....	.....	1,951	2,151	6,729,721	151,001
1884	.....	.....	8,082	11,240	2,298,696	57,101
1885	.....	.....	3,926	5,003	8,306,432	171,432
1886	.....	.....	9,289	12,103	130,658	1,586
1887	.....	.....	.....	.....	5,272,170	99,653
1888	.....	.....	.....	.....	3,964,419	77,887
1889	8,745	15,542	24,287	62,240	853,621	16,743
1890	30,253	23,799	54,052	75,908	2,769,881	44,040
1891	52,609	53,698	106,307	161,345	3,333,317	59,032
1892	123,196	51,595	174,791	276,113	6,035,035	96,828
1893	204,349	21,898	226,247	377,039	8,001,788	143,146
1894	301,837	32,187	334,024	498,652	15,544,826	250,646
1895	461,733	28,221	489,954	580,489	25,941,400	393,492
1896	434,683	31,874	466,557	501,498	21,583,658	330,728
1897	529,162	31,162	560,324	659,260	15,699,098	241,189

Next to New Zealand, the largest exporter of frozen mutton is New South Wales. During the last few years greater efforts have been made in this colony to expand the trade, and the exports show a considerable increase, although a temporary check was experienced in 1897 in consequence of the unfavourable season. But New South Wales has laboured under the disadvantage of possessing no cross-bred sheep for export, and the food qualities of the merino are scarcely appreciated in the English market, where New Zealand mutton is favourably known, and brings on an average 1½d. per lb. more than Australian. Large tracts of the mother colony, however, are suited to the breeding of large-carcase sheep, and the pastoralists have become alive to the importance of securing a share of the meat trade of the United Kingdom. Attention

is being directed to the introduction of British rams into the colony, and a large increase in the cross-bred flocks has already taken place. Up to the present, however, the cross-bred carcasses sent by New South Wales to England have not been kept apart from the merino, and have therefore failed to return the higher prices which might be expected. The attention of the freezing companies has been directed to this point, but so far without effect. The following table shows the growth of the frozen-meat trade of New South Wales; the exports of preserved meat consist almost wholly of tinned mutton:—

Year.	Frozen or Chilled Meat.				Preserved Meat.	
	Beef.	Mutton.	Total Weight.	Total Value.	Weight.	Value.
	quarters.	carcasses.	cwt.	£	lb.	£
1881	.....	.....	9,980	8,554	.....	*176,721
1882	.....	.....	13,782	22,910	.....	*143,601
1883	.....	.....	34,911	43,100	.....	*221,912
1884	.....	.....	13,309	12,321	.....	*161,477
1885	.....	.....	6,271	6,064	.....	*166,561
1886	.....	.....	4,852	4,671	.....	*77,756
1887	.....	.....	21,831	19,310	9,761,154	150,714
1888	.....	.....	52,262	44,537	4,528,269	69,481
1889	.....	.....	37,868	33,426	2,877,303	52,321
1890	.....	.....	72,304	71,534	4,655,523	74,329
1891	.....	.....	105,013	101,828	6,581,713	87,632
1892	.....	.....	223,074	169,425	8,620,747	103,922
1893	4,773	364,958	220,584	141,640	13,092,942	164,592
1894	9,538	533,995	339,404	193,760	16,382,597	206,054
1895	88,719	1,021,006	607,818	380,107	22,384,285	302,828
1896	16,286	1,372,373	642,188	343,397	16,351,936	218,292
1897	28,529	1,065,990	503,925	275,118	10,903,611	147,165

* Including Extract of Meat.

The total capacity of the boiling-down works in New South Wales is stated at 633,900 head of cattle or 16,965,000 sheep; of chilling works, 488,500 head of cattle or 5,422,800 sheep; of freezing works, 76,500 head of cattle or 3,150,000 sheep; and of meat-preserving works, 183,000 head of cattle or 5,445,000 sheep.

The only other colony in which the meat-export trade has reached dimensions of any importance is Victoria, although its exports fall far

below those of the three colonies already dealt with. A statement of the Victorian trade from 1881 to 1897 will be found below :—

Year.	Frozen or Chilled Meat.				Preserved Meat.	
	Beef.	Mutton.	Total Weight.	Total Value.	Weight.	Value.
	cwt.	cwt.	cwt.	£	lb.	£
1881	.....	.....	.....	.....	4,026,072	102,306
1882	.....	.....	18,522	18,969	1,274,066	30,705
1883	.....	.....	9,944	12,220	3,225,657	76,015
1884	.....	.....	41,373	53,196	2,667,866	63,707
1885	.....	.....	39,107	61,617	1,486,849	38,244
1886	.....	.....	39,384	70,319	616,652	17,868
1887	.....	.....	15,245	27,270	629,054	14,291
1888	.....	.....	.....	.....	714,856	16,115
1889	.....	.....	.....	.....	805,580	16,156
1890	.....	.....	.....	.....	893,114	20,197
1891	.....	.....	.....	.....	1,052,887	19,230
1892	.....	.....	.....	.....	1,982,151	51,624
1893	.....	.....	1,307	1,838	777,953	14,349
1894	53	27,182	27,235	25,370	2,267,791	40,082
1895	268	24,563	24,831	31,673	2,917,730	43,408
1896	127	23,634	23,761	25,827	4,335,511	71,576
1897	62	21,416	21,478	20,248	5,498,315	84,914

There are at present depastured in Australasia 111,000,000 sheep and 12,702,000 cattle, of which 19,700,000 sheep and 1,138,000 cattle are in New Zealand. In this colony the industry of sheep and cattle raising has now reached such a stage that practically the whole of the stock available for market is used up every year either locally or for export, and as a consequence the numbers of both kinds of stock are stationary, and have been so for some years past. In the continental colonies a different state of things prevails. In New South Wales there is a large surplus of sheep beyond the colony's food requirements; while the cast of cattle is below the local demand, and is supplemented by the importation of stock from Queensland, the net import for the past three years being 126,049 head. The other four colonies have each a deficiency of cattle and sheep.

It is estimated that in an average year 10·25 per cent. of all the cattle depastured would be of marketable age, could they be made fit for slaughtering. Excluding New Zealand, the cattle in Australasia number 11,564,000, and at 10·25 per cent. the annual cast would be 1,185,310. The present food requirements of the colonies may be set down at 736,000 head, leaving a balance of 449,000 as the surplus available, or which might be made available, for export. At the present time, however, some of the surplus is exported either as chilled beef or preserved meat, and it is estimated that 130,000 head are annually so disposed of, leaving about 320,000 head, of age fit for market, which it is unprofitable to keep beyond their present age. These comprise the real "surplus" difficulty of the colonies, and it is a question for experts

to determine how many of the 320,000 could be fattened for export, but there seems to be abundant evidence that from 60,000 to 100,000 head of cattle could be exported in any ordinary year without trenching upon local requirements, while if the trade could be expanded without touching ruinous prices the export might be made much larger. The surplus of sheep cannot be less than 4,500,000.

Looking at the question from all points of view, it cannot be said that the frozen-meat trade is without strong elements of hope for the future. The great difficulty in the way of an expansion of the trade is the serious fall in prices; but there is no reason why better results should not be obtained if shippers are careful not to export anything of unsatisfactory quality, and so tend to enhance the value of Australian meat in the eyes of the British consumer. Signs are not wanting that the prejudice which existed against frozen mutton in the United Kingdom is fast dying out, and the adoption of the defrosting process, by which the meat may be placed on the market with a much more attractive appearance at an extra cost of $\frac{1}{4}$ d. per lb., will hasten its extinction. That it is largely prejudice is made clear by the fact that of the large imports of Australian mutton into London only a small proportion seems to reach the consumer as such, the greater portion being sold as Welsh or English.

During the years 1894 and 1895 several attempts, more or less successful, were made to place live cattle and sheep in the English market. A great difficulty which was found to be in the way of establishing such a trade was the wildness of the cattle, the mortality in some of the shipments being sufficiently high to provoke strong criticism in England as to the cruelty to which the cattle were subjected by being shipped on such a long voyage. It is to be feared, however, that these expressions of opinion were prompted, not altogether by the alleged sufferings of the cattle, but to a large extent by the interests of the English producer and the American exporter. At the same time, it is clear that a permanent and profitable trade cannot be established until the cattle have been handled sufficiently to bring them into a tractable condition, for the present system of depasturing followed in Australia renders the stock too wild to endure a long stay on shipboard. Probably, however, the great strides made by the Argentine Republic in supplying the English market will make it difficult for Australian shippers to realise a satisfactory margin of profit, the near proximity of that country to Great Britain giving it an immense advantage over these colonies in the matter of freights. In view of the vast population of the United States, any increase in the export of live cattle from that country cannot be anticipated.

DAIRY-FARMING.

Dairy-farming has of late years made fair progress in Australasia, especially in the colonies of New South Wales, Victoria, and New Zealand. The introduction of the factory system at convenient centres

and the use of the cream separator have done much to cause the extension of the industry. The number of dairy cows and the estimated quantity of milk produced by them in each colony in 1896 were as follow :—

Colony.	Dairy Cows.	Quantity of Milk produced (estimated).
	No.	gallons.
New South Wales	400,183	108,050,000
Victoria	457,924	137,000,000
Queensland	125,000*	30,500,000
South Australia	84,265	23,000,000
Western Australia	16,814	3,699,000
Tasmania	43,343	13,003,000
New Zealand	300,219	96,070,000
Australasia	1,427,748	411,322,000

* Estimated.

The estimated value of the milk and its products, butter and cheese, and of the return obtained from swine, together with the total value of dairy produce for each colony in 1896, will be found below :—

Colony.	Value of Milk, Butter, and Cheese.	Value of Return from Swine.	Total Value of Dairy and Swine Produce.
	£	£	£
New South Wales	1,852,700	381,200	2,233,900
Victoria	2,162,000	473,500	2,635,500
Queensland	569,500	125,300	694,800
South Australia	428,200	91,700	519,900
Western Australia	93,700	36,400	130,100
Tasmania	220,000	77,600	297,600
New Zealand	1,474,300	245,300	1,719,600
Australasia	6,800,400	1,431,000	8,231,400

The production of butter and cheese in each colony during 1896 is estimated to have been as follows :—

Colony.	Butter.	Cheese.
	lb.	lb.
New South Wales	25,874,000	4,020,000
Victoria	37,128,000	4,743,000
Queensland	6,164,000	1,921,000
South Australia	4,617,000	907,000
Western Australia	244,000	4,000
Tasmania	2,351,000	567,000
New Zealand	21,837,000	10,812,000
Australasia	98,215,000	22,974,000

The colonies having a surplus of butter and cheese available for exportation during 1896 are shown in the following table :—

Colony.	Butter.	Cheese.
	lb.	lb.
New South Wales	592,962	.....
Victoria	22,164,418	367,193
South Australia	337,745	.....
New Zealand	7,919,312	7,986,048
Total.....	31,014,437	8,353,241

New South Wales was formerly both an importer and an exporter of butter, for only during the spring and early summer months was the production larger than the local requirements, while during the remainder of the year butter had to be imported to meet the local demand. Now the colony has become an exporter of butter to the United Kingdom on a fair scale ; but a large quantity of New Zealand butter is still sent to the New South Wales markets on account of the more satisfactory price realised there. There is also an importation from South Australia and Victoria for the supply of the districts adjacent to those colonies. During 1895, owing to diminished production, due to scarcity of food for the cattle on account of the drought, the imports of New South Wales exceeded the exports by 51,611 lb. ; but in 1896 the exports again exceeded the imports by 592,962 lb., and in 1897 by 3,771,474 lb.

The colonies which, on the other hand, were obliged to import butter and cheese during 1896 are shown below :—

Colony.	Butter.	Cheese.
	lb.	lb.
New South Wales .....	.....	949,706
Queensland	989,738	68,770
South Australia .....	.....	25,230
Western Australia	3,190,509	885,795
Tasmania	101,066	21,140
Total.....	4,281,313	1,950,641

From the foregoing figures it will be seen that those colonies which produce a surplus of butter and cheese have, after providing for the deficiency of the other provinces, a balance available for exportation to outside countries, this balance in 1896 amounting to 26,733,124 lb. of butter and 6,402,600 lb. of cheese. An export trade in butter and cheese has long been maintained by New Zealand, while in recent years

Victorian, New South Wales, and South Australian butters have been sent to the London market, and their very favourable reception there has given a fresh stimulus to the dairying industry in those colonies. The rapidity with which this trade is growing may be gauged from the following table, which shows the quantity of butter exported to the United Kingdom during the nine years ended 1897 :—

Year.	Exporting Colony.			
	New South Wales.	Victoria.	South Australia.	New Zealand.
	lb.	lb.	lb.	lb.
1889	284,251	505,478	.....	2,363,088
1890	589,160	1,286,583	10,850	2,976,848
1891	391,180	3,778,775	23,864	3,246,768
1892	1,532,782	6,446,900	.....	4,648,980
1893	2,846,989	13,141,423	357,087	5,864,656
1894	4,333,927	22,139,521	1,233,539	6,590,640
1895	1,852,360	21,127,025	1,017,629	6,181,728
1896	1,741,272	16,452,649	242,872	6,730,304
1897	5,431,109	15,450,857	16,240	8,948,088

From latest advices it would appear that the price obtained for Australian butter in London was higher than the rates ruling in the local market; and as there can hardly be a limit placed to the capacity of Australasia to produce butter and cheese, it is probable that these high prices will have the effect of greatly stimulating the dairy industry throughout all these colonies. In connection with this subject, it may be mentioned that the value of the butter, cheese, and eggs imported into the United Kingdom during 1897 was £15,916,917, £5,885,521, and £4,356,807 respectively. The supply is chiefly drawn from the Continent of Europe and from America, and of the total amounts mentioned, the only imports from Australasia were butter to the value of £1,303,515; and cheese to the value of £161,776.

It may not be out of place to remark that in one or two of the colonies the export of butter has helped to maintain prices in the local markets, and tended to restrict home consumption. If a season of great prosperity visits Australia there will be a very large increase in the local demand, with a consequent limitation in the supply available for export, so that it may be concluded that under any circumstances the prospects of the industry are encouraging.

The breeding of swine is usually carried on in conjunction with dairy-farming. Below will be found a return of the number of swine in each colony in 1861 and in 1896, together with the proportion owned by each province in comparison with the total stock. It will be observed that the actual number owned by the various colonies has in all cases increased, with the single exception of South Australia, though the relative proportions have altered considerably. New South Wales, for

instance, held over 40 per cent. of the stock of swine in 1861, whilst in 1896 its proportion had receded to 21·3 per cent.; on the other hand Victoria, which possessed only 12 per cent. in 1861, has now nearly 34 per cent. of the total number. During the intervening period, New Zealand increased its stock from nearly 12 per cent. to nearly 21 per cent. of the whole, while the proportion held by South Australia decreased from 19·1 to 6·1 per cent. :—

Colony.	Number of Swine.		Percentage of each colony to total of Australasia.	
	1861.	1896.	1861.	1896.
New South Wales.....	146,091	214,581	40·3	21·3
Victoria.....	43,480	*337,588	12·0	33·5
Queensland.....	7,465	97,434	2·1	9·7
South Australia.....	69,286	61,114	19·1	6·1
Western Australia.....	11,984	31,154	3·3	3·1
Tasmania.....	40,841	55,301	11·3	5·5
New Zealand.....	43,270	209,853	11·9	20·8
Australasia.....	362,417	1,007,025	100·0	100·0

* 1894 figures ; returns not collected for 1895 or 1896.

The products of the swine—bacon, ham, lard, and salt pork—are now exported by all the colonies with the exception of New South Wales and Western Australia, as is shown by the following table, which relates to the year 1896 :—

Colony.	Bacon and Ham.	Salt Pork.	Lard.	Net Value imported.
	£	£	£	£
New South Wales.....	*27,220	1,221	*884	*26,883
Victoria.....	49,591	639	1,175	51,405
Queensland.....	6,687	°13	1,803	8,477
South Australia.....	3,262	179	.....	3,441
Western Australia.....	*68,109	°913	°1,139	*70,161
Tasmania.....	1,476	.....	.....	1,476
New Zealand.....	18,332	399	192	18,923
Australasia.....	°15,981	1,512	1,147	*13,322

* Excess of imports.

In the case of Victoria and New Zealand small quantities of fresh and frozen pork are included with salt pork. There seems to be considerable scope for an extension of this particular branch of farming in some of the colonies.

POULTRY AND MINOR INDUSTRIES.

An estimate is given below of the value of the production of poultry and eggs, together with that arising from bee-culture, in each colony during the year 1896 :—

Colony.	Poultry and Eggs.	Honey and Beeswax.
	£	£
New South Wales	752,700	16,100
Victoria	707,100	14,700
Queensland	279,800	5,800
South Australia	215,300	4,500
Western Australia	71,800	1,500
Tasmania	98,100	2,000
New Zealand	423,900	8,800
Australasia	2,548,700	53,400

The most remarkable feature is the trade in eggs between South Australia as supplier and New South Wales, Victoria, and Western Australia as buyers. The returns for 1896 show that during that year South Australia exported eggs to the value of £40,353, viz., £1,461 to Victoria, £9,972 to New South Wales, and £28,920 to Western Australia. The bulk of the trade with New South Wales is transacted with the Barrier district, which is commercially a dependency of South Australia.

PASTORAL AND DAIRY PRODUCTION.

The total value of pastoral and dairy production during the year 1896, in each colony and in the whole of Australasia, together with the value per inhabitant, is shown in the following table :—

Colony.	Total Value of Pastoral and Dairy Production.	Value per Inhabitant.
	£	£ s. d.
New South Wales	16,240,000	12 12 3
Victoria	9,050,000	7 13 7
Queensland	6,923,000	14 6 11
South Australia	2,801,000	7 16 2
Western Australia	882,000	7 7 6
Tasmania	1,001,000	6 2 6
New Zealand	9,086,000	12 17 3
Australasia	45,983,000	10 14 10

From the following table, which gives similar information for the years 1871, 1881, and 1891, it will be seen that while the total production has increased nearly twofold since 1871 the value per inhabitant has largely decreased. In point of total value of production New South Wales, Queensland, Western Australia, and New Zealand show the most satisfactory progress ; while in Victoria, South Australia, and Tasmania the pastoral industry has advanced much more slowly :—

Colony.	1871.	1881.	1891.
	£	£	£
New South Wales	8,709,000	13,151,000	17,460,000
Victoria	7,260,000	7,499,000	9,321,000
Queensland	1,959,000	4,186,000	7,561,400
South Australia	1,800,000	3,178,000	3,148,525
Western Australia	274,000	431,000	647,350
Tasmania	734,000	1,093,000	1,117,550
New Zealand	3,210,000	7,096,000	9,153,225
Australasia {	Total	23,946,000	36,634,000
	Per head	£ s. d. 12 7 7	£ s. d. 12 12 0

It will be seen that the value of the production of the pastoral and dairying industry shows a fall since 1891, not only relatively to population, but absolutely to the extent of £2,426,050. Taking the principal articles of pastoral produce together, there has not been a decline in the quantities produced, although the dry season was responsible for a decline in the export of wool in 1896, and the cast of sheep was less ; indeed, the few years which have elapsed since 1891 have seen great developments in the export trade in fresh meat and butter, and the shrinkage in the total value of the trade must be set down, in an ordinary season, entirely to the fall in prices :—

Produce.	1891.	1896.
Wool, as in grease	Lb. 707,018,000	Lb. 687,383,000
Cast of sheep	No. 17,000,000	No. 15,259,000
Cast of cattle	No. 1,216,000	No. 1,302,000
Butter produced	Lb. 70,628,000	Lb. 98,215,000
Meat export.....	Cwt. 1,454,000	Cwt. 2,672,000

By the term "cast" is meant the number of animals of the proper age available for slaughter. The movement in prices will be seen from the following tabulation, which is based chiefly on an analysis of the New South Wales trade. The prices of 1896 are represented by 1,000:—

Year.	Price Levels of—				
	Wool.	Butter.	Cattle.	Tallow.	Hides.
1891	1,034	1,061	980	1,144	1,311
1892	1,015	1,069	964	1,167	1,119
1893	909	989	794	1,293	992
1894	842	819	610	1,201	916
1895	935	711	600	1,111	1,190
1896	1,000	1,000	1,000	1,000	1,000