

## 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 1910, and from 1917 onwards in single years, are given in the following table, and are shown continuously in the graphs hereinafter.

During the sixty-two years covered by the table the live stock of Australia increased considerably, horses 454 per cent., cattle 262 per cent., sheep 291 per cent., and pigs 181 per cent. The average annual increases which these aggregates represent are as follows:—Horses 2.85 per cent.; cattle 2.13 per cent.; sheep 2.26 per cent.; and pigs, 1.71 per cent.

LIVE STOCK.—AUSTRALIA, 1860 TO 1922.

Year.	Horses.	Cattle.	Sheep.	Pigs.
1860 .. .. .	431,525	3,957,915	20,135,286	351,096
1870 .. .. .	716,772	4,276,326	41,593,612	543,388
1880 .. .. .	1,061,078	7,523,000	62,176,027	815,776
1890 .. .. .	1,521,588	10,299,913	97,881,221	891,138
1900 .. .. .	1,609,654	8,640,225	70,602,995	950,349
1910 .. .. .	2,165,866	11,744,714	92,047,015	1,025,850
1917 .. .. .	2,497,903	11,829,138	84,965,012	1,169,365
1918 .. .. .	2,527,149	12,738,852	87,086,236	913,902
1919 .. .. .	2,421,201	12,711,067	75,554,082	695,968
1920 .. .. .	2,415,510	13,499,737	77,897,555	764,406
1921 .. .. .	2,438,182	14,441,309	82,226,470	960,385
1922 .. .. .	2,390,460	14,336,673	78,803,261	985,930

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 1869, 1877, 1884, 1895, and subsequent years, 1902, 1908, 1912, 1914–15, 1918 to 1920, and again in 1922–23, in which latter years the interior of the Continent experienced one of the driest periods on record, and the mortality of stock was heavy.

As an offset to these visitations, the process of re-stocking is greatly facilitated by the large natural increases occurring in the good seasons which invariably supervene on dry periods, 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-two years in the manner shown in the succeeding table:—

LIVE STOCK PER HEAD OF POPULATION—AUSTRALIA, 1860 TO 1922.

Year.	Horses.	Cattle.	Sheep.	Pigs.	Year.	Horses.	Cattle.	Sheep.	Pigs.
1860 ..	0.38	3.45	17.58	0.31	1917 ..	0.50	2.36	16.97	0.23
1870 ..	0.43	2.60	25.24	0.33	1918 ..	0.49	2.48	16.99	0.18
1880 ..	0.48	3.37	27.87	0.37	1919 ..	0.45	2.38	14.15	0.13
1890 ..	0.48	3.27	31.06	0.28	1920 ..	0.44	2.49	14.35	0.14
1900 ..	0.43	2.29	18.75	0.25	1921 ..	0.44	2.61	14.86	0.17
1910 ..	0.49	2.65	20.80	0.23	1922 ..	0.42	2.54	13.94	0.17

Considered in relation to population the most noticeable variations have been the largely reduced numbers of sheep and pigs in recent years, the reductions amounting to about one-half of the earlier figures. The number of cattle has also declined, though an upward trend has been in evidence since 1917, while the position of horses has remained stationary.

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.

States and Territories.	Date.	Horses.	Cattle.	Sheep.	Pigs.
New South Wales ..	30th June, 1923 ..	2.13	10.49	112.22	1.10
Victoria ..	1st March, 1923 ..	5.63	20.32	133.88	3.36
Queensland ..	31st Dec., 1922 ..	1.06	10.37	26.31	0.24
South Australia ..	30th June, 1923 ..	0.70	1.12	16.59	0.20
Western Australia ..	31st Dec., 1922 ..	0.19	0.96	6.83	0.07
Tasmania ..	1st March, 1923 ..	1.42	8.32	59.45	1.76
Northern Territory ..	31st Dec., 1922 ..	0.08	1.45	0.01	0.00
Fed. Cap. Territory ..	30th June, 1923 ..	1.43	6.68	147.94	0.29
Total .. ..	1922-23 .. ..	0.80	4.82	26.49	0.33

7. **Minor Classes of Live Stock.**—The numbers of minor classes of live stock returned for 1922-23 were as follows:—Goats, 230,481; camels, 11,079; mules and donkeys, 16,350; and ostriches, 816. 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 13,000 angora goats are included in the total of 230,481 goats shown above. Of these, 2,792 were in New South Wales, 1,627 in Western Australia, and 3,503 in Queensland, while the quantity of mohair produced in the latter State in 1922 was set down at 1,596 lbs., and the number of skins placed on the market was returned as 617.

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 1918-19 to 1922-23 are as follows:—

## NET EXPORTS OF PASTORAL PRODUCTS.—AUSTRALIA, 1918-19 TO 1922-23.

Products.	Unit of Quantity.	1918-19.	1919-20.	1920-21.	1921-22.	1922-23.
QUANTITIES.						
Animals (living)—						
Cattle .. .. .	No.	644	3,133	4,396	9,110	13,818
Horses .. .. .	"	8,686	5,787	8,195	1,798	3,545
Sheep .. .. .	"	18,001	21,601	19,307	36,111	37,959
Bones .. .. .	cwt.	25,689	29,198	24,180	21,718	23,276
Glue Pieces and Sinews .. .. .	"	3,878	8,158	-3,920	4,987	6,927
Glycerine .. .. .	lb.	1,633,510	-21,745	-854,254	19,348	343,292
Hair .. .. .	"	402,869	600,595	100,434	-126,037	(a)
Hoofs .. .. .	cwt.	10,000	11,382	7,580	10,615	11,174
Horns .. .. .	"	(a)	(a)	(a)	(a)	(a)
Meats—						
Frozen Beef .. .. .	lb.	119,938,442	120,939,750	179,618,149	124,158,191	152,925,321
Frozen Mutton and Lamb .. .. .	"	59,672,405	248,957,427	54,892,764	91,712,280	167,578,967
Frozen Rabbits and Hares .. .. .	pair	5,132,983	9,622,150	3,925,004	4,857,404	4,264,054
Frozen, Other .. .. .	lb.	12,329,539	11,397,792	7,901,468	6,676,605	13,062,037
Potted and Extract of .. .. .	"	(a)	(a)	(a)	(a)	(a)
Preserved in Tins, etc. .. .. .	lb.	65,118,256	47,550,045	8,296,500	9,133,860	10,583,164
Other (excluding Bacon and Ham) .. .. .	"	424,777	755,141	482,317	344,167	495,116
Sausage Casings .. .. .	cwt.	(a)	(a)	(a)	(a)	24,623
Skins—						
Hides .. .. .	No.	26,819	540,415	-8,317	80,415	47,900
Sheep .. .. .	"	6,663,978	10,143,952	5,117,431	6,780,522	10,237,162
Rabbit and Hare .. .. .	cwt.	117,569	127,452	49,427	74,224	122,748
Other (including Undressed Furs) .. .. .	"	(a)	(a)	(a)	(a)	(a)
Tallow .. .. .	cwt.	870,950	712,307	524,220	893,772	1,016,831
Wool—						
Greasy .. .. .	lb.	457,995,701	552,307,700	417,647,343	710,591,430	597,429,649
Scoured .. .. .	"	106,313,411	84,900,446	61,525,697	102,346,835	106,319,965
Tops .. .. .	"	2,822,578	6,148,118	6,598,681	6,200,505	6,374,922

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 £306,839,655 for the period, or an average of £61,367,931 per annum, of which wool represents 75 per cent. Meats, skins, and tallow rank next in order of importance.

## NET EXPORTS OF PASTORAL PRODUCTS.—AUSTRALIA, 1918-19 TO 1922-23.

Products.	1918-19.	1919-20.	1920-21.	1921-22.	1922-23.
VALUES.					
Animals (living)—	£	£	£	£	£
Cattle .. .. .	3,567	-23,855	30,350	53,274	64,731
Horses .. .. .	161,533	117,739	137,497	-1,148	27,978
Sheep .. .. .	35,007	57,854	140,975	36,921	42,017
Bones .. .. .	27,156	31,534	21,839	19,610	26,137
Glue Pieces and Sinews .. .. .	6,904	15,340	302	7,883	13,725
Glycerine .. .. .	58,073	1,351	-39,374	1,516	6,536
Hair .. .. .	29,335	66,943	28,416	6,736	-62,830
Hoofs .. .. .	11,091	14,526	8,180	7,120	8,137
Horns .. .. .	18,474	52,383	29,609	34,418	35,388
Meats—					
Frozen Beef .. .. .	2,471,136	2,474,904	3,819,094	1,867,681	1,794,104
Frozen Mutton and Lamb .. .. .	1,298,086	5,482,263	1,578,634	2,139,537	4,320,977
Frozen Rabbits and Hares .. .. .	308,965	762,936	432,745	407,143	321,329
Frozen, Other .. .. .	381,780	305,948	190,795	128,451	189,170
Potted and Extract of .. .. .	328,233	99,599	9,649	-49,636	-40,170
Preserved in Tins, etc. .. .. .	3,771,373	2,778,503	380,694	324,275	266,273
Other (excluding Bacon and Ham) .. .. .	15,380	37,845	16,741	10,852	10,577
Sausage Casings .. .. .	101,400	212,427	-43,160	128,127	285,504
Skins—					
Hides .. .. .	156,084	1,089,731	-113,202	122,471	249,208
Sheep .. .. .	1,921,411	2,585,171	1,228,012	1,305,223	2,973,146
Rabbit and Hare .. .. .	1,314,366	3,670,791	968,972	784,346	1,961,777
Other (including Undressed Furs) .. .. .	313,472	2,268,748	715,656	288,633	785,467
Tallow .. .. .	2,167,728	2,855,602	1,347,400	1,440,683	1,612,676
Wool—					
Greasy .. .. .	31,477,707	38,414,608	25,298,176	38,970,130	45,769,295
Scoured .. .. .	10,351,553	9,169,288	6,426,167	7,795,146	9,898,651
Tops .. .. .	985,212	2,957,679	2,049,588	1,207,048	1,412,683
Total Values .. .. .	57,665,116	75,499,858	44,663,755	57,036,440	71,974,486

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 recent 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 1919, and has strengthened its position during the past four seasons. Particulars for the several States during the past five years are as follows:—

HORSES—NUMBER, 1918 TO 1922.

Year.	N.S.W. (b)	Vic. (a)	Q'land.	S. Aust. (b)	W. Aust.	Tas. (a)	N.T.	F.C.T. (b)	Total.
1918	721,302	523,788	758,632	269,255	180,094	41,221	31,436	1,421	2,527,149
1919	660,751	513,500	730,326	264,901	174,919	39,452	35,839	1,513	2,421,201
1920	661,846	487,503	741,024	268,187	178,664	39,117	37,837	1,332	2,415,510
1921	668,501	496,124	746,281	267,639	180,334	38,439	39,565	1,299	2,438,182
1922	658,686	494,947	713,015	264,150	181,159	37,313	39,845	1,345	2,390,460

(a) 1st March year following.

(b) 30th June year following.

The number of horses in Australia from 1860 onwards, may be ascertained from the graph hereinafter.

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, 1918 TO 1922.

Year.	N.S.W.	Vic.	Q'land.	S. Aust.	W. Aust.	Tas.	N.T.	F.C.T.	Total.
	%	%	%	%	%	%	%	%	%
1918 ..	28.53	20.72	30.05	10.65	7.12	1.63	1.24	0.06	100.00
1919 ..	27.29	21.21	30.16	10.94	7.23	1.63	1.48	0.06	100.00
1920 ..	27.40	20.18	30.68	11.10	7.40	1.62	1.57	0.05	100.00
1921 ..	27.42	20.35	30.61	10.98	7.40	1.57	1.62	0.05	100.00
1922 ..	27.55	20.70	29.83	11.05	7.58	1.56	1.67	0.06	100.00

The relative changes in distribution are insignificant, the only alteration during the last four years being a decrease of 1 per cent. in New South Wales, occasioned by slight increases in South Australia, Western Australia and the Northern Territory.

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, with the exception of Northern Territory, since 1918. Particulars for the past five years are as follows :—

#### HORSES.—NUMBER PER HEAD OF POPULATION, 1918 TO 1922.

Year.	N.S.W.	Victoria.	Q'land.	S. Aust.	W. Aust.	Tas.	N. Ter.	Fed. Cap. Ter.	All States.
1918 ..	0.36	0.36	1.08	0.57	0.58	0.20	6.78	0.60	0.49
1919 ..	0.32	0.34	0.99	0.54	0.53	0.19	7.88	0.68	0.45
1920 ..	0.31	0.32	0.99	0.54	0.54	0.18	9.48	0.52	0.44
1921 ..	0.31	0.32	0.97	0.53	0.54	0.18	10.59	0.45	0.44
1922 ..	0.30	0.31	0.90	0.51	0.53	0.17	11.22	0.41	0.42

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, are as follows :—

#### HORSES.—NUMBER IN PRINCIPAL COUNTRIES.

Country.	Date.	Number of Horses (,000 omitted.)	Country.	Date.	Number of Horses (,000 omitted.)
U.S. of America ..	1923	19,969	Turkey ..	1919	630
Russia in Europe ..	1921	17,109	Spain ..	1922	594
Argentine Republic ..	1921	9,432	Czecho-Slovakia ..	1920	592
Russia in Asia ..	1921	6,792	Denmark ..	1923	562
Brazil ..	1920	5,254	Uruguay ..	1919	555
China ..	1916	4,401	Colombia ..	1915	526
Germany ..	1922	3,648	Paraguay ..	1919	490
Canada ..	1923	3,531	Lithuania ..	1921	440
Poland ..	1921	3,201	India (Native States)	1920	432
France ..	1922	2,778	Bulgaria ..	1920	412
Australia ..	1922	2,390	Finland ..	1921	393
United Kingdom ..	1922	2,106	Chile ..	1919	392
Rumania ..	1922	1,802	Netherlands ..	1921	364
India (British) ..	1922	1,684	Latvia ..	1923	338
Japan ..	1921	1,511	New Zealand ..	1922	331
Jugo-Slavia ..	1923	1,034	Austria ..	1923	282
Italy ..	1919	990	Philippine Islands ..	1920	269
Mexico ..	1920	929	Belgium ..	1922	230
Union of South Africa	1921	920	Norway ..	1920	216
Cuba ..	1923	840	Estonia ..	1923	210
Sweden ..	1920	728	Algeria ..	1920	201
Dutch East Indies ..	1921	702	Greece ..	1920	201
Hungary ..	1920	635			

6. *Oversea Trade in Horses.*—(i) *Exports.* Australia's export trade in horses is fairly considerable, though somewhat fluctuating. During the past five years it has varied in number between 8,832 in 1918-19 and 2,075 in 1921-22, and in value between £189,354 in the former and £68,234 during the latter year. The total number of horses exported during the five years amounted to 29,002, valued at £721,011, or equal to an annual average of 5,800 for £144,202. The average export price for the period was £24 17s. 3d. Nearly 90 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 £279 18s. 8d., as compared with £24 17s. 3d. per head for the exports for the same period. The average number imported per annum was, however, only 198, and the average annual value, £55,482. The following table gives the imports, exports, and net exports of horses during each of the years from 1918-19 to 1922-23 :—

## HORSES.—IMPORTS AND EXPORTS, AUSTRALIA, 1918-19 TO 1922-23.

Year.	Imports.		Exports.		Net Exports.	
	No.	Value.	No.	Value.	No.	Value.
		£		£		£
1918-19 .. ..	146	27,821	8,832	189,354	8,686	161,533
1919-20 .. ..	152	49,078	5,939	166,817	5,787	117,739
1920-21 .. ..	107	49,446	8,302	186,943	8,195	137,497
1921-22 .. ..	277	69,382	2,075	68,234	1,798	- 1,148
1922-23 .. ..	309	81,685	3,854	109,663	3,545	27,978

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 object 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 of 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 drought of 1922-23 particularly affected the beef cattle areas of New South Wales and Queensland and decreases were recorded in both States during 1922, while the returns for 1923 will probably reveal further losses.

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

## CATTLE.—NUMBER, 1918 TO 1922.

Year.	N.S.W. (b)	Victoria. (a)	Q'land.	S. Aust. (b)	W. Aust.	Tas. (a)	Nor. Ter.	Fed. Cap. Ter. (b)	Total.
1918	3,271,782	1,596,544	5,786,744	342,768	943,847	218,234	570,039	8,894	12,738,852
1919	3,075,954	1,631,120	5,940,433	349,562	880,644	214,442	610,534	8,378	12,711,067
1920	3,367,880	1,575,159	6,455,067	376,399	849,803	208,202	659,840	7,387	13,499,737
1921	3,538,240	1,750,369	7,047,370	419,197	893,108	216,704	568,031	8,290	14,441,309
1922	3,244,905	1,785,660	6,955,463	425,811	939,596	218,197	760,766	6,275	14,336,673

(a) 1st March year following.

(b) 30th June year following.

3. Proportion in each State.—Percentages showing the relative importance of the various cattle-breeding States during the years 1918 to 1922 are given hereunder:—

## CATTLE.—PERCENTAGE IN EACH STATE, 1918 TO 1922.

Year.	N.S.W.	Victoria.	Q'land.	S. Aust.	W. Aust.	Tas.	Nor. Ter.	Fed. Cap. Ter.	Total.
	%	%	%	%	%	%	%	%	%
1918 ..	25.68	12.53	45.43	2.69	7.41	1.71	4.48	0.07	100.00
1919 ..	24.20	12.83	46.73	2.75	6.93	1.69	4.80	0.07	100.00
1920 ..	24.95	11.67	47.82	2.79	6.29	1.54	4.89	0.05	100.00
1921 ..	24.50	12.12	48.80	2.90	6.19	1.50	3.93	0.06	100.00
1922 ..	22.63	12.46	48.52	2.97	6.55	1.52	5.31	0.04	100.00

Queensland contains within its borders nearly one half of the cattle-herds of Australia. During the past four years substantial gains in numbers have increased its percentage to 48.52, or 3 per cent. more than in 1918. This increase has been won mainly at the expense of the next most important State, New South Wales, where, although the numbers have remained stationary, the proportion to the total in Australia declined by 3.05 per cent.

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

**CATTLE.—NUMBER PER HEAD OF POPULATION, 1918 TO 1922.**

Year.	N.S.W.	Victoria.	Q'land.	S. Aust.	W. Aust.	Tas.	Nor. Ter.	Fed. Cap. Ter.	All States.
1918 ..	1.64	1.11	8.20	0.73	3.05	1.08	122.85	3.77	2.48
1919 ..	1.49	1.09	8.05	0.72	2.69	1.02	134.27	3.77	2.38
1920 ..	1.60	1.03	8.58	0.76	2.57	0.98	165.29	2.86	2.49
1921 ..	1.65	1.12	9.15	0.83	2.66	0.99	152.00	2.84	2.61
1922 ..	1.48	1.12	8.82	0.82	2.73	1.00	214.24	1.93	2.54

The maintenance of the ratio of cattle to population during the last four years must be regarded as highly satisfactory, in view of the depressed state of the beef export industry and the effects of the recent drought.

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) ..	1922	116,665	Indo-China ..	1921	3,099
U.S. of America ..	1923	66,801	French Equatorial and West Africa ..	1922	2,950
Argentine Republic ..	1922	37,065	Siam ..	1922	2,864
Brazil ..	1920	34,271	Nigeria ..	1921	2,824
Russia in Europe ..	1921	28,805	Kenia ..	1922	2,814
India (Native States) ..	1920	24,877	Sweden ..	1920	2,736
Germany ..	1923	16,653	Denmark ..	1923	2,537
China ..	1921	15,973	Bulgaria ..	1920	2,288
<b>Australia</b> ..	<b>1922</b>	<b>14,337</b>	Austria ..	1923	2,163
France ..	1922	13,576	Chile ..	1919	2,163
United Kingdom ..	1922	12,059	Mexico ..	1920	2,163
Russia in Asia ..	1921	9,888	Venezuela ..	1920	2,078
Canada ..	1923	9,246	Netherlands ..	1921	2,063
Union of South Africa ..	1921	8,557	Hungary ..	1920	1,971
Poland ..	1921	7,895	Rhodesia ..	1922	1,801
Uruguay ..	1919	7,802	Finland ..	1921	1,792
Madagascar ..	1921	7,661	French Morocco ..	1923	1,683
Italy ..	1919	6,239	Japan ..	1921	1,587
Rumania ..	1922	5,746	Belgium ..	1922	1,517
Paraguay ..	1919	5,500	Korea ..	1920	1,490
Cuba ..	1923	4,976	Switzerland ..	1921	1,425
Czecho-Slovakia ..	1920	4,391	Ceylon ..	1921	1,386
Jugo-Slavia ..	1923	4,053	Peru ..	1921	1,302
Dutch East Indies ..	1921	3,791	Italian Somaliland ..	1921	1,246
Turkey ..	1919	3,740	Nicaragua ..	1921	1,200
New Zealand ..	1922	3,481	Norway ..	1920	1,095
Colombia ..	1915	3,305	Algeria ..	1920	1,093
Spain ..	1922	3,297	French Sudan ..	1922	1,025
Tanganyika Territory	1921	3,147			

6. 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 breeding. Details are as follows:—

**CATTLE.—IMPORTS AND EXPORTS, AUSTRALIA, 1918-19 TO 1922-23.**

Year.	Imports.		Exports.		Net Exports.	
	No.	Value	No.	Value.	No.	Value.
		£		£		£
1918-19 ..	66	3,373	710	6,940	644	3,567
1919-20 ..	337	55,656	3,470	31,801	3,133	23,855
1920-21 ..	127	10,979	4,523	41,329	4,396	30,350
1921-22 ..	108	10,769	9,218	64,043	9,110	53,274
1922-23 ..	147	18,856	13,965	83,587	13,818	64,731

NOTE.—The minus sign - signifies net imports.

The average value of the cattle imported during the last five years was £126 18s. 5d. per head, while the average value of the cattle exported during the same period was £7 2s. 10d. As stated previously, the imported cattle were required principally for stud purposes.

7. Cattle Slaughtered.—The number of cattle slaughtered during each of the years 1918 to 1922 is given hereunder:—

**CATTLE (INCLUDING CALVES) SLAUGHTERED, 1918 TO 1922.**

Year.	N.S.W. (a)	Victoria.	Q'land.	S. Aust. (a)	W. Aust.	Tas.	N. Ter.	Fed. Cap. Ter. (a)	Total.
1918	437,046	223,340	498,737	73,148	48,707	22,419	31,511	141	1,335,049
1919	593,859	362,475	461,197	85,978	55,056	15,753	23,286	138	1,597,742
1920	525,981	374,545	449,103	90,944	68,055	27,468	1,330	74	1,537,500
1921	631,699	331,707	499,992	95,323	54,640	33,566	2,445	90	1,649,462
1922	738,908	424,199	504,394	127,294	79,823	31,026	1,587	142	1,907,373

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

8. Production and Consumption of Beef.—The production of beef in Australia during the years 1914-15 to 1920-1921 was calculated at 764,489,000 lbs. per annum. Of this quantity, local requirements absorbed 558,487,000 lbs., or more than 73 per cent., leaving a balance of about 27 per cent., which was exported as frozen and canned beef. The annual consumption of beef per head of population in Australia averaged 109.68 lbs. compared with 79.85 lbs. in the United States of America, and 58.30 lbs. in the United Kingdom.

9. Export of Beef Preserved by Cold Process.—A large export trade in beef preserved by cold process is carried on by Australia in normal times, mainly with the United Kingdom, Egypt, and the Philippine Islands. The quantities so exported during the five years 1918-19 to 1922-23 were as follows:—

**BEEF PRESERVED BY COLD PROCESS.—EXPORTS, AUSTRALIA, 1918-19 TO 1922-23.**

Country to which Exported.	1918-19.	1919-20.	1920-21.	1921-22.	1922-23.	Total for 5 years.
QUANTITY.						
	lbs.	lbs.	lbs.	lbs.	lbs.	lbs.
United Kingdom ..	47,056,554	105,725,679	156,316,163	108,671,867	112,316,545	530,086,808
Egypt ..	68,681,034	6,616,637	10,202,633	1,904,187	5,228,357	92,632,848
Philippine Islands ..	1,994,336	2,928,722	2,479,724	8,093,851	4,780,134	20,276,767
Malaya (British) ..	1,480,201	2,366,035	3,305,162	2,392,991	2,215,561	11,759,950
Germany ..					17,321,705	17,321,705
Hawaiian Islands ..	489,640	2,104,769	2,437,135	554,698	2,089,605	7,675,847
Italy ..			3,096,341		67,315	3,163,656
Hong Kong ..	75,791	467,974	849,904	610,785	511,417	2,515,871
Ceylon ..	60,854	405,347	530,636	322,010	456,739	1,775,586
United States ..	40,086	301,673	133,304	71,615	99,878	646,556
Other Countries ..	111,021	162,075	291,477	1,545,349	7,863,411	9,973,333
Total ..	119,989,517	121,078,911	179,642,479	124,167,353	152,950,667	697,828,927



**BEEF PRESERVED BY COLD PROCESS.—EXPORTS, AUSTRALIA—continued.**

Country to which Exported.	1918-19.	1919-20.	1920-21.	1921-22.	1922-23.	Total for 5 years.
VALUE.						
United Kingdom ..	£ 958,164	£ 2,130,527	£ 3,302,283	£ 1,616,075	£ 1,285,049	£ 9,292,098
Egypt ..	1,415,713	133,583	207,643	24,431	67,684	1,849,054
Philippine Islands ..	44,225	65,331	56,032	133,696	60,843	350,127
Malaya (British) ..	33,284	53,363	71,099	44,687	34,552	236,985
Germany ..	..	..	..	..	202,119	202,119
Hawaiian Islands ..	14,058	62,818	77,784	7,280	28,412	190,352
Italy ..	..	..	62,575	..	842	63,417
Hong Kong ..	1,704	10,496	18,558	11,117	6,771	48,571
Ceylon ..	2,130	11,539	13,478	6,111	8,455	41,713
United States ..	1,023	7,422	3,429	1,130	1,269	14,273
Other Countries ..	2,485	4,239	6,965	23,400	98,739	135,828
Total ..	2,472,786	2,479,248	3,819,841	1,867,927	1,794,735	12,434,537

During the five years under review the United Kingdom has been Australia's largest customer for frozen beef and has taken nearly 76 per cent. of the total shipments. Egypt, the Philippine Islands and Malaya (British) ranked next in order of importance. The exporting States during 1922-23 were:—Queensland, 130,988,347 lbs., valued at £1,477,560; New South Wales, 7,705,605 lbs., valued at £110,274; Western Australia, 9,954,698 lbs., valued at £152,349; Victoria, 3,238,741 lbs., valued at £41,890; and South Australia, 1,063,276 lbs., valued at £12,662.

10. **Beef Subsidy.**—The prices ruling for frozen beef in England early in 1922 were so low that it became unprofitable to export Australian beef. A succession of good seasons had stocked the country to capacity, and the failure of the export treatment works to absorb the surplus greatly depressed the beef industry. In order to assist cattle growers, the Commonwealth Government in September, 1922, passed the Meat Export Bounties Act which provided for the payment of a subsidy of  $\frac{1}{4}$ d. per lb. on all frozen or canned beef exported or placed in cool stores for export, and 10s. per head on live cattle exported for slaughter, from April to December, 1922. The granting of the subsidy was made conditional on reductions of  $\frac{1}{4}$ d. per lb. being effected in both the cost of treating and of shipping the meat. The bounty was renewed in 1923 on the same conditions as in 1922. Although the amount of the bounty was small, it gave an acceptable measure of relief to the cattle industry. Many of the works were able to operate, and more than 200,000 head of cattle were treated each year, which would otherwise have remained to accentuate the existing depression. The bounty paid during 1922 amounted to £117,245 17s. 5d. for frozen beef, and £4,521 10s. for live cattle, while in 1923 £136,900 was distributed for frozen beef, and £3632 for live cattle. For the 1924 season the Government has decided to discontinue the bounty on frozen meat and to renew the provision for live cattle exported for slaughter.

**§ 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 though 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. From 1878 to 1901, the number of sheep in New South Wales represented more than half the total for Australia, but in recent years the proportion has fallen away considerably.

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 greatly reduced the numbers at successive intervals, but these losses were as quickly regained, and, despite a decrease of  $3\frac{1}{2}$  million during 1922, the number reported

amounted to nearly 79,000,000. In 1891 the number reached its maximum, viz., 106,421,068. There has been no approach to that number in recent years, but it has been considered that the flocks in 1891 were in excess of the reasonable sheep-carrying capacity of the country. The rapid growth of the frozen mutton and lamb industry precludes the building up of Australia's flocks to such large dimensions as heretofore, and it appears unlikely that the 1891 figures will be approached in the immediate future.

The number of sheep in the several States and Territories for each year from 1918 to 1922 was as follows:—

#### SHEEP.—NUMBER, 1918 TO 1922.

Year.	New South Wales. (b)	Victoria. (a)	Queens-land.	South Australia. (b)	Western Australia.	Tasmania. (a)	Nor. Ter.	Fed. Cap. Ter. (b)	Total.
1918	37,243,770	15,773,902	18,220,985	6,625,184	7,183,747	1,841,924	58,620	138,104	87,086,236
1919	29,077,514	14,422,745	17,379,332	6,014,565	6,697,951	1,781,425	8,811	171,739	75,554,082
1920	33,691,838	12,171,084	17,404,840	6,359,944	6,532,965	1,570,832	6,062	159,990	77,897,555
1921	37,025,716	12,325,818	18,402,399	6,257,052	6,506,177	1,551,273	6,349	151,686	82,226,470
1922	34,723,684	11,765,520	17,641,071	6,305,133	6,664,135	1,558,404	6,161	139,063	78,803,261

(a) 1st March, year following.

(b) 30th June, year following.

During the year 1919 the Avon Downs Pastoral Company in the Northern Territory disposed of the whole of their flock numbering about 50,000, and this property is now stocked with cattle only.

**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 1918 to 1922 are given hereunder:—

#### SHEEP.—PERCENTAGE IN EACH STATE, 1918 TO 1922.

Year.	N.S.W.	Victoria.	Q'land.	S. Aust.	W. Aust.	Tas.	N. Ter.	Fed. Cap. Ter.	Total.
	%	%	%	%	%	%	%	%	%
1918 ..	42.77	18.11	20.92	7.61	8.25	2.11	0.07	0.16	100.00
1919 ..	38.49	19.09	23.00	7.96	8.86	2.36	0.01	0.23	100.00
1920 ..	43.25	15.62	22.34	8.16	8.39	2.02	0.01	0.21	100.00
1921 ..	45.03	14.99	22.38	7.61	7.91	1.89	0.01	0.18	100.00
1922 ..	44.06	14.93	22.38	8.00	8.46	1.98	0.01	0.18	100.00

Apart from the effect of drought the percentage of sheep depastured in the different States changes little. The most noteworthy alteration was a loss of 3.18 per cent. in Victoria, as the result of a decrease of 4,008,382 sheep in that State since 1918.

**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 1918 to 1922 is as follows:—

#### SHEEP.—NUMBER PER HEAD OF POPULATION, 1918 TO 1922.

Year.	N.S.W.	Victoria.	Q'land.	S. Aust.	W. Aust.	Tas.	N. Ter.	Fed. Cap. Ter.	All States.
1918 ..	18.66	10.97	25.83	14.14	23.19	9.08	12.63	58.59	16.99
1919 ..	14.07	9.59	23.56	12.36	20.46	8.48	1.94	77.29	14.15
1920 ..	16.03	7.96	23.14	12.78	19.75	7.38	1.52	62.04	14.35
1921 ..	17.24	7.95	23.90	12.39	19.41	7.10	1.70	52.05	14.86
1922 ..	15.86	7.40	22.38	12.20	19.39	7.12	1.74	42.72	13.94

The ratio to population has decreased by more than three sheep per head since 1918. This, decline, however, is temporary, and has been caused by the losses during the droughts of 1919–20 and 1922–23.

**5. Comparison with other Countries.**—As regards the size of its flocks, and the quantity and quality of wool produced, Australia has long occupied a leading position amongst the sheep-raising countries of the world. From estimates published in the Year Book of the International Institute of Agriculture it would appear that the approximate number of sheep in the world is in the neighbourhood of 530,000,000, to which total Australia contributes about 15 per cent. The following comparison taken mainly from

the same source gives the latest available 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 .. ..	1922	78,803	Chile .. ..	1919	4,500
U.S. of America ..	1923	38,361	Portugal .. ..	1920	3,851
Russia in Europe ..	1921	34,986	Tanganyika Territory(a)	1921	3,405
Union of South Africa ..	1921	31,730	Tunis .. ..	1922	2,820
Argentine Republic ..	1922	30,672	Canada .. ..	1923	2,754
United Kingdom ..	1922	23,747	Kenia .. ..	1922	2,464
New Zealand .. ..	1922	23,081	Poland .. ..	1921	2,178
China .. ..	1916	22,232	French Soudan ..	1922	2,030
India (British) ..	1922	22,085	Nigeria .. ..	1921	1,909
Spain .. ..	1922	19,377	French West African		
Rumania .. ..	1922	12,321	Colonies .. ..	1922	1,873
India (Native States) ..	1920	12,073	Basutoland ..	1921	1,854
Italy .. ..	1919	11,754	Eritrea .. ..	1922	1,701
Uruguay .. ..	1919	11,473	Italian Somaliland ..	1921	1,666
Turkey .. ..	1919	11,200	Finland .. ..	1922	1,572
Peru .. ..	1921	11,056	Sweden .. ..	1920	1,568
Russia in Asia ..	1921	10,499	Latvia .. ..	1923	1,461
France .. ..	1922	9,782	Bolivia .. ..	1910	1,449
Algeria .. ..	1920	9,140	British S.-W. Africa ..	1922	1,350
Bulgaria .. ..	1920	8,906	Hungary .. ..	1920	1,284
Brazil .. ..	1920	7,933	French Equatorial		
Jugo-Slavia .. ..	1923	7,542	Africa (a) .. ..	1922	1,126
French Morocco ..	1923	7,121	Syria .. ..	1922	1,092
Germany .. ..	1923	6,094	Mexico .. ..	1920	1,090
Greece .. ..	1920	5,811			

(a) Including goats.

6. **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 the 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 have 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 1918–19 to 1922–23:—

### SHEEP.—IMPORTS AND EXPORTS, AUSTRALIA, 1918–19 TO 1922–23.

Year.	Imports.		Exports.		Net Exports.	
	No.	Value.	No.	Value.	No.	Value.
		£		£		£
1918–19 ..	607	4,776	18,608	39,783	18,001	35,007
1919–20 ..	269	6,258	21,870	64,112	21,601	57,854
1920–21 ..	3,038	8,828	22,345	149,803	19,307	140,975
1921–22 ..	345	4,836	36,456	41,757	36,111	36,921
1922–23 ..	235	3,378	38,194	45,395	37,959	42,017

7. **Sheep Slaughtered.**—The number of sheep slaughtered in the several States during each of the years from 1918 to 1922 was as follows:—

### SHEEP (INCLUDING LAMBS) SLAUGHTERED, 1918 TO 1922.

Year.	N.S.W. (b)	Victoria.	Q'land.	S. Aust. (b)	W. Aust.	Tas. (a)	Nor. Ter.	Fed. Cap. Ter.(b)	Total.
1918 ..	4,271,396	3,581,460	542,479	1,187,578	630,117	295,844	c500	3,334	10,462,708
1919 ..	5,533,484	6,324,490	717,191	1,478,557	800,252	330,000	c100	3,800	15,187,874
1920 ..	3,847,498	4,244,798	461,449	1,058,977	839,963	387,346	c100	3,765	10,843,896
1921 ..	5,226,516	4,005,587	769,360	1,208,347	871,831	362,871	30	3,333	12,447,875
1922 ..	5,662,953	5,863,195	762,540	1,290,660	900,128	344,989	..	3,323	14,827,797

(a) Partly estimated.

(b) Year ended 30th June year following.

(c) Estimated.

8. **Production and Consumption of Mutton and Lamb.**—The annual production of mutton and lamb during the seven years ended 1920–21 averaged 469,056,000 lbs., of which 362,881,000 lbs., or 77.4 per cent., was consumed locally, the balance of 22.6 per cent. being exported. The consumption of mutton and lamb in Australia during the period amounted to 69.47 lbs. per head per annum, a figure considerably in excess of the consumption in the United Kingdom and the United States of America, where for latest dates the quantity consumed amounted to 26.65 and 6.00 lbs. per annum respectively.

9. **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 off considerably during the war years, but with the release of shipping space and profitable rates in England the record shipment of 246,971,346 lbs., valued at £5,482,564 was made in 1919–20. The dearth of supplies consequent upon the drought greatly reduced the consignments in 1920–21, but the trade expanded in 1921–22, and an exceptionally large volume of exports was dispatched in 1922–23. The heavy shipments of the latter year may be attributed to the high prices ruling in England for imported mutton and lamb, coupled with the unfavourable seasonable outlook for stock in Australia. Considerable attention is paid to the breeding of a class of sheep that will best meet the requirements of consumers. Crosses between the Merino and the Lincoln, or between the Merino and the Leicester breeds have proved exceedingly valuable, as they furnish both a good quality of wool and an excellent carcass for export purposes. The breeding of Shropshire and Southdown sheep with a view to combining meat production with that of wool is also on the increase. Special attention is being paid to the raising of lambs, as it has become widely recognized that with suitable breeds the export trade in lambs is very profitable.

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 Egypt, Malaya (British), and Sweden.

**MUTTON AND LAMB PRESERVED BY COLD PROCESS.—EXPORTS, AUSTRALIA, 1918–19 TO 1922–23.**

Country to which Exported.	1918–19.	1919–20	1920–21.	1921–22.	1922–23.	Total for 5 years.
QUANTITY.						
	lbs.	lbs.	lbs.	lbs.	lbs.	lbs.
United Kingdom ..	49,784,705	239,154,276	47,792,058	88,631,613	162,653,301	588,015,953
Egypt ..	8,464,515	..	2,744,246	178,380	984,473	12,371,614
Malaya (British) ..	754,089	1,102,658	1,228,087	1,089,985	1,106,778	5,281,597
Sweden ..	..	2,119,602	1,217,551	..	..	3,337,153
Hong Kong ..	195,881	376,315	410,329	391,166	432,250	1,805,941
Union of South Africa ..	..	1,578,839	193,709	72,920	179,226	2,024,694
Ceylon ..	189,875	383,518	398,214	396,880	340,484	1,708,971
Philippine Islands ..	194,843	595,312	237,264	289,294	208,910	1,525,623
Canada ..	..	273,047	37,427	329,030	203,315	842,819
United States ..	..	148,304	124,535	..	..	272,839
Other Countries ..	103,547	1,239,475	510,401	335,731	1,503,824	3,692,978
Total ..	59,687,455	246,971,346	54,893,821	91,714,099	167,612,561	620,880,182

VALUE.						
	£	£	£	£	£	£
United Kingdom ..	1,082,646	5,292,542	1,393,179	2,073,276	4,205,189	14,048,832
Egypt ..	176,551	..	64,409	3,514	18,825	263,299
Malaya (British) ..	20,796	30,599	36,980	24,750	28,531	141,656
Sweden ..	..	49,303	29,805	..	..	79,108
Hong Kong ..	5,399	10,201	12,352	3,690	12,104	48,746
Union of South Africa ..	..	34,788	4,535	1,029	3,710	44,062
Ceylon ..	5,058	10,401	11,784	7,781	8,872	43,896
Philippine Islands ..	5,395	14,709	6,595	6,347	5,740	38,786
Canada ..	..	8,675	955	7,422	3,944	20,996
United States ..	..	3,603	4,684	..	..	8,287
Other Countries ..	2,586	27,743	13,380	6,806	35,002	85,517
Total ..	1,293,431	5,482,564	1,578,658	2,139,615	4,321,917	14,821,185

## § 5. Wool.

1. **Importance of Wool Production.**—Wool is the chief factor in the pastoral wealth of Australia, the value of the output for the season ended 30th June, 1923, being about £49,015,500. The bulk of the production is exported, but with the greater activity of the local woollen mills there has, in recent years, been an increasing quantity used in Australia, although even now the quantity so used represents only about 8 per cent. of the whole clip.

2. **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 15 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 pounds of "greasy" wool are on the average required to produce one pound of "scoured and washed."

3. **Production.**—(i) *Total.* The estimated production of wool in the several States, formerly based on the Customs returns, being no longer available from that source, an effort has been made to arrive at approximate figures from data collected by the State Statisticians from growers, fellmongers, etc. Particulars for years prior to 1918-19 will be found in earlier issues of the Year Book. The following table gives the estimates obtained for the five seasons ended 30th June, 1919 to 1923 :—

WOOL.—TOTAL PRODUCTION, 1918-19 TO 1922-23.

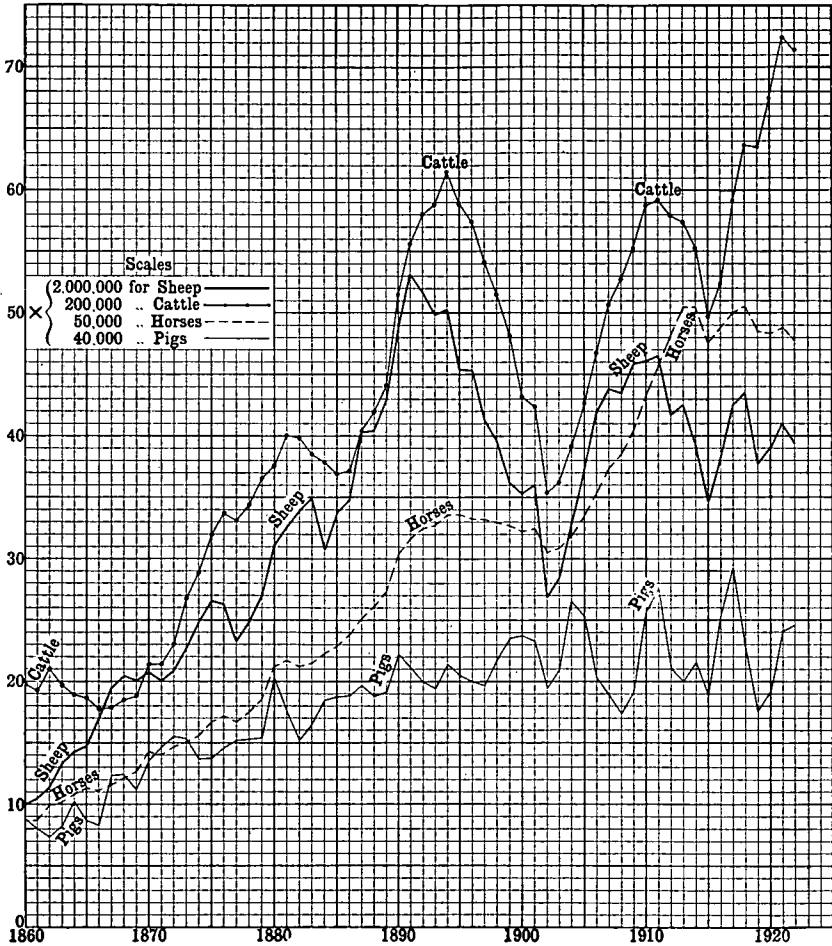
State.	1918-19.	1919-20.	1920-21.	1921-22.	1922-23.
	lbs.	lbs.	lbs.	lbs.	lbs.
New South Wales (a)	305,613,000	296,641,000	240,231,000	285,418,000	293,571,000
Victoria ..	126,647,061	132,847,167	90,250,571	103,512,777	102,467,950
Queensland ..	113,777,272	118,035,461	114,809,963	132,579,733	134,971,150
South Australia ..	55,947,108	58,306,918	48,953,503	54,038,262	54,929,801
Western Australia ..	45,317,271	46,299,381	43,714,630	46,301,039	44,139,138
Tasmania ..	10,279,998	11,069,237	9,503,048	9,634,624	10,218,550
Northern Territory (b)	330,000	50,000	40,000	30,000	20,000
Total ..	657,911,710	663,249,164	547,502,715	631,514,435	640,317,589

(a) Including Federal Capital Territory.

(b) Approximate figures.

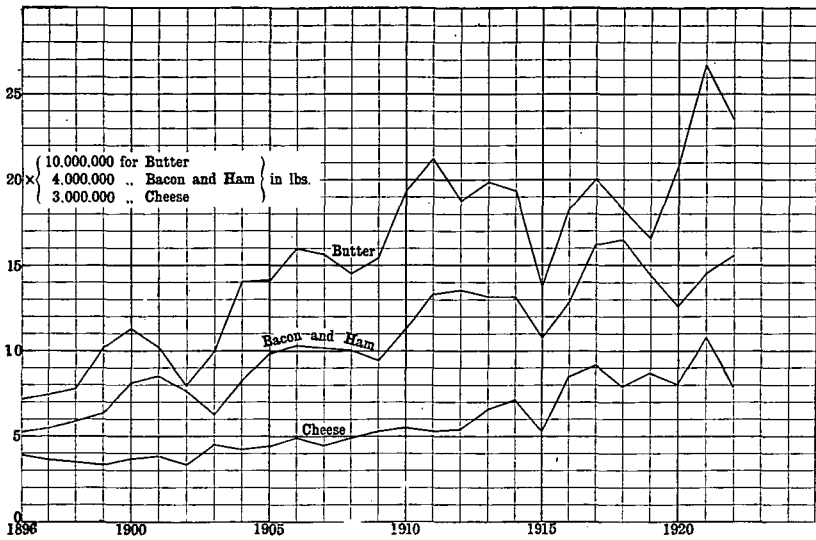
In connexion with the figures obtained by the State Statisticians, a slight deficiency is apparent when comparisons are made with totals obtained from oversea shipments plus local consumption, or with the returns published by the Central Wool Committee. The extent of the discrepancy in recent years cannot be estimated owing to the inclusion of carry-over wool in the export returns.

NUMBER OF HORSES, CATTLE, SHEEP, AND PIGS—AUSTRALIA, 1860 TO 1922.



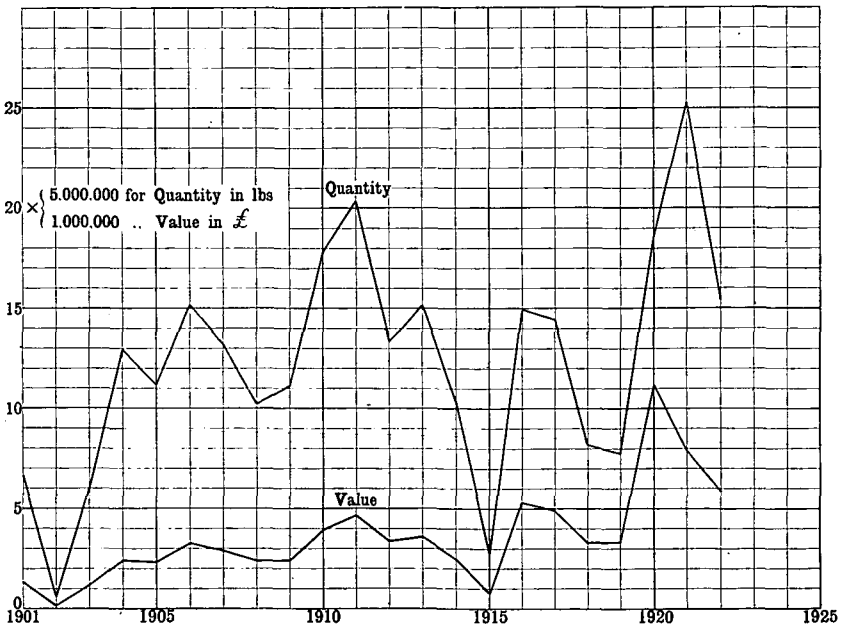
EXPLANATION.—The base of each small square represents an interval of one year, and the vertical side 2,000,000 in the case of sheep, 200,000 for cattle, 50,000 for horses, 40,000 for pigs.

**PRODUCTION OF BUTTER AND CHEESE, AND BACON AND HAM—AUSTRALIA,  
1896, TO 1922.**



**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, 1900 TO 1922.**



**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.

(ii) *Weight and Value per Sheep Shorn.* The weight and value of wool per sheep shorn in the past five seasons is shown in the following table :—

**WOOL.—WEIGHT AND VALUE PER SHEEP SHORN, 1918-19 TO 1922-23.**

Season ended 30th June.	N.S.W.	Vic.	Q'land.	S. Aust.	W. Aust.	Tas.	All States.
<b>WEIGHT.</b>							
	lbs.	lbs.	lbs.	lbs.	lbs.	lbs.	lbs.
1919 .. ..	7.13	6.21	6.30	7.41	6.09	5.09	6.68
1920 .. ..	7.03	6.38	6.59	7.89	5.71	5.32	6.73
1921 .. ..	6.93	5.77	7.03	7.56	5.76	5.19	6.65
1922 .. ..	7.49	6.23	7.57	7.70	6.19	5.77	7.18
1923 .. ..	7.24	6.25	6.99	7.58	5.82	5.86	6.91
<b>VALUE.</b>							
	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.
1919 .. ..	8 11	8 3	8 10	9 0	7 4	7 9	8 7
1920 .. ..	8 10	8 4	9 3	9 3	7 1	8 3	8 9
1921 .. ..	7 11	7 10	8 9	8 6	6 3	7 3	8 0
1922 .. ..	8 1	6 11	8 11	7 8	6 5	6 8	7 10
1923 .. ..	10 9	9 8	11 3	11 3	9 0	10 6	10 7

4. *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.

5. *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 2,697,192,000 lbs. in 1922 Australia's contribution amounted to 631,514,000 lbs., or nearly one quarter of the world's supply.

**WOOL(a).—WORLD PRODUCTION, 1921 AND 1922.**

Countries.	Average Annual Pre-War Production.(b)	Production.	
		1921.	1922.(c)
North America—	lbs.	lbs.	lbs.
United States .. ..	314,110,000	273,064,000	261,035,000
Canada .. ..	11,210,000	21,251,000	19,125,000
Mexico .. ..	7,000,000	750,000	792,000
Total .. ..	332,320,000	295,065,000	281,012,000
Central America and West Indies .. ..	1,000,000	750,000	750,000
South America—			
Argentine Republic ..	358,688,000	286,000,000	231,483,000
Brazil .. ..	35,000,000	27,000,000	27,000,000
Chile .. ..	17,430,000	31,500,000	31,500,000
Peru .. ..	9,940,000	14,500,000	15,000,000
Falkland Islands ..	4,324,000	3,200,000	3,200,000
Uruguay .. ..	156,968,000	95,000,000	80,000,000
All other .. ..	5,000,000	5,000,000	5,000,000
Total .. ..	587,350,000	462,200,000	393,183,000

(a) Computed on greasy basis. (b) Average for years 1909 to 1913 inclusive. (c) Where 1922 figures were not obtainable an earlier figure or an unofficial estimate has been inserted.



## WOOL(a).—WORLD PRODUCTION, 1921 AND 1922—continued.

Countries.	Average Annual Pre-War Production.(b)	Production.	
		1921.	1922.(c)
Europe—	lbs.	lbs.	lbs.
Austria .. ..	15,360,000	1,250,000	1,250,000
Belgium .. ..	1,060,000	1,205,000	825,000
Bulgaria .. ..	23,700,000	17,637,000	17,637,000
Czecho-Slovakia .. ..	..	4,303,000	4,303,000
Denmark .. ..	3,508,000	1,598,000	1,323,000
Estonia .. ..	..	13,224,000	13,224,000
Finland .. ..	..	3,250,000	3,300,000
France .. ..	80,688,000	38,500,000	38,220,000
Germany .. ..	25,600,000	54,013,000	51,809,000
Greece .. ..	14,000,000	11,934,000	13,420,000
Hungary .. ..	17,637,000	9,370,000	9,370,000
Iceland .. ..	1,980,000	1,980,000	1,980,000
Italy .. ..	55,000,000	50,000,000	50,000,000
Jugo-Slavia .. ..	25,446,000	29,762,000	24,251,000
Netherlands .. ..	3,556,000	4,400,000	4,400,000
Norway .. ..	8,160,000	4,409,000	4,409,000
Poland .. ..	..	6,725,000	6,725,000
Portugal .. ..	10,000,000	7,275,000	7,717,000
Rumania .. ..	13,228,000	14,000,000	18,032,000
Russia .. ..	320,000,000	150,000,000	150,000,000
Spain .. ..	52,000,000	165,347,000	165,347,000
Sweden .. ..	6,060,000	6,613,000	6,613,000
Switzerland .. ..	1,049,000	800,000	800,000
Turkey .. ..	28,000,000	..	..
United Kingdom .. ..	134,000,000	102,297,000	103,217,000
All other .. ..	..	15,000,000	15,000,000
Total .. ..	840,032,000	714,892,000	713,172,000
Asia—			
British India .. ..	60,000,000	60,000,000	60,000,000
China .. ..	50,000,000	61,320,000	61,320,000
Persia .. ..	12,146,000	12,146,000	12,146,000
Russia in Asia .. ..	60,000,000	45,000,000	45,000,000
Turkey in Asia .. ..	90,000,000	60,000,000	60,000,000
All other .. ..	1,000,000	1,000,000	1,000,000
Total .. ..	273,146,000	239,466,000	239,466,000
Africa—			
Algeria .. ..	35,221,000	35,550,000	35,155,000
British South Africa .. ..	157,761,000	161,700,000	187,000,000
Tunis .. ..	3,735,000	6,930,000	6,765,000
Morocco .. ..	14,850,000	18,640,000	19,175,000
Total .. ..	211,567,000	222,820,000	248,095,000
Oceania—			
Australia .. ..	700,193,000	547,503,000	631,514,000
New Zealand .. ..	198,474,000	191,614,000	175,000,000
Total .. ..	898,667,000	739,117,000	806,514,000
Total all other Countries .. ..	13,000,000	13,000,000	15,000,000
GRAND TOTAL .. ..	3,157,082,000	2,687,310,000	2,697,192,000

(a) Computed on greasy basis. (b) Average for years 1909 to 1913 inclusive. (c) Where 1922 figures were not obtainable an earlier figure or an unofficial estimate has been inserted.

6. **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 AND TWEED MILLS,  
1918-19 TO 1922-23.**

State.	1918-19.	1919-20.	1920-21.	1921-22.	1922-23.
	lbs.	lbs.	lbs.	lbs.	lbs.
New South Wales .. ..	6,769,284	7,054,962	7,206,896	6,648,224	4,882,740
Victoria .. ..	7,823,050	11,300,400	12,799,593	13,293,011	15,926,225
Queensland .. ..	268,917	634,376	556,232	1,822,494	1,358,888
South Australia .. ..	654,758	693,297	683,779	608,098	621,265
Western Australia .. ..					
Tasmania .. ..	1,301,006	997,542	1,129,722	1,043,706	1,502,060
Total .. ..	16,817,015	20,680,577	22,376,222	23,415,533	24,291,178

The total consumption of wool in Australia cannot be given, as particulars in respect of wool-combing and knitting establishments are not collected in all the States. An estimate, based upon the available particulars and the purchases made by manufacturers at local wool sales, places the figure in the vicinity of 50,000,000 lbs.

7. **Exports of Wool.**—(i) *Greasy-Quantities.* Prior to the war, about 31 per cent. of the exports of wool from Australia was despatched to the United Kingdom, whereas the shipments for the same destination during the past five years have averaged over 63 per cent. The other leading consignees during the latter period were France, United States of America, Belgium, Japan, Italy and Germany. The following table shows for the years 1918-19 to 1922-23 the quantities of "greasy" wool exported, and the principal countries of destination:—

**WOOL IN THE GREASE.—EXPORTS, AUSTRALIA, 1918-19 TO 1922-23.**

Country to which Exported.	1918-19.	1919-20.	1920-21.	1921-22.	1922-23.	Total for 5 years.
	lbs.	lbs.	lbs.	lbs.	lbs.	lbs.
United Kingdom .. ..	352,282,663	397,688,435	283,583,260	337,775,993	259,230,707	1,630,561,058
France .. ..	3,719,125	32,243,017	32,484,058	138,751,611	137,742,458	342,940,269
United States of America ..	71,776,334	28,326,008	34,291,220	45,778,371	50,234,655	230,406,588
Belgium .. ..		39,189,760	26,021,710	55,690,271	34,180,045	155,081,786
Italy .. ..	10,036,918	44,597,155	15,975,186	30,629,626	28,648,259	138,885,144
Japan .. ..	5,819,577	8,928,971	9,856,174	50,775,592	50,043,561	124,923,875
Germany .. ..			8,715,299	39,830,067	32,940,661	81,486,027
Egypt .. ..	10,950,893			290	1,437	10,952,620
Canada .. ..	3,152,424		362,915	1,619,372	1,184,321	6,319,032
India .. ..	795,792		381,516	613,701	296,164	2,087,173
Other Countries .. ..		1,360,782	6,228,698	2,255,819	3,823,722	13,669,021
Total .. ..	458,033,726	552,334,128	417,900,036	710,720,713	598,323,990	2,737,312,593

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

**WOOL, SCOURED AND WASHED(a).—EXPORTS, AUSTRALIA, 1918-19 TO 1922-23.**

Country to which Exported.	1918-19.	1919-20.	1920-21.	1921-22.	1922-23.	Total for 5 years.
	lbs.	lbs.	lbs.	lbs.	lbs.	lbs.
United Kingdom .. ..	103,261,254	70,454,411	43,100,738	65,815,973	75,505,841	358,138,217
Belgium .. ..		13,931,527	10,648,048	16,153,469	3,938,725	44,671,769
France .. ..	27,239	105,177	1,544,101	13,271,181	13,533,782	28,481,480
Japan .. ..	3,447,825	3,676,467	3,719,499	5,051,529	6,435,286	22,369,606
United States of America ..	1,460,294	2,600,657	6,490,418	1,880,728	4,588,736	17,020,833
Germany .. ..			279,822	3,209,868	6,006,516	9,496,206
Italy .. ..			568,690	1,500,550	1,005,988	3,075,228
India .. ..	216,326		130,260	48,831	13,513	408,930
Other Countries .. ..	723,051	282,537	1,642,802	1,627,222	1,746,180	6,021,792
Total .. ..	109,135,989	91,050,776	68,124,378	108,559,351	112,774,567	489,645,061

(a) Including "tops."

The figures for "scoured and washed wool" include tops, amounting in 1918-19 to 2,822,578 lbs., valued at £935,212; in 1919-20, 6,148,118 lbs., valued at £2,957,679; in 1920-21, 6,598,681 lbs., valued at £2,049,588, in 1921-22, 6,200,505 lbs., valued at £1,207,048, and in 1922-23, 6,374,922 lbs., valued at £1,412,683. The total exports of wool tops during the last five years amounted to 28,144,804 lbs., valued at £8,562,210, of which 19,177,377 lbs., or more than 68 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, 1918-19 TO 1922-23.**

Country to which Exported.	1918-19.	1919-20.	1920-21.	1921-22.	1922-23.	Total for 5 years.
	£	£	£	£	£	£
United Kingdom ..	34,563,566	37,256,915	21,889,438	23,013,128	25,901,608	142,624,655
United States of America ..	4,982,056	2,516,142	3,836,987	4,347,360	5,618,652	21,301,197
France ..	304,410	2,352,749	1,357,358	6,842,265	10,408,195	21,264,977
Japan ..	1,400,192	2,010,732	2,107,473	4,438,672	6,095,616	16,052,685
Belgium ..		3,356,349	2,380,519	3,784,065	2,514,717	12,035,650
Italy ..	548,142	2,832,951	1,164,280	2,667,081	2,498,733	9,711,187
Germany ..			364,196	2,404,833	3,448,031	6,217,060
Canada ..	238,924	63,520	79,588	245,421	184,365	811,818
Egypt ..	613,814			8	48	613,870
India ..	78,336		45,198	50,243	11,487	185,264
Other Countries ..	37,315	154,445	555,723	184,167	457,312	1,388,962
<b>Total ..</b>	<b>42,766,755</b>	<b>50,543,803</b>	<b>33,780,760</b>	<b>47,977,243</b>	<b>57,138,764</b>	<b>232,207,325</b>

8. *Average Export Value.*—The average values per lb. of Australian greasy wool according to the export returns for the past five years have been as follows :—

**AUSTRALIAN GREASY WOOL.—EXPORT VALUE PER LB., 1918-19 TO 1922-23.**

Year .. ..	1918-19.	1919-20.	1920-21.	1921-22.	1922-23.
	d.	d.	d.	d.	d.
Average value per lb. ..	16.49	16.69	14.53	13.16	18.38

9. *Exports and Local Sales of Wool, States, 1922-23.*—About 86 per cent. of the wool grown in Australia is sold in the local markets prior to export. Buyers from the United Kingdom, France, Germany, and other European countries, also from America, Japan, China, and India, attend the sales conducted in Sydney, Melbourne, Geelong, 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, 1923, and the number sold for shipment, for use in local woollen mills, for scouring, etc. As considerable quantities of wool grown in some States are sold in or shipped from others these figures do not therefore show actual local production, but total overseas shipments and sales.

**WOOL.—EXPORTS AND LOCAL SALES, SEASON 1922-23.**

State.	Overseas Exports.		Local Sales.(a)	
	Bales.	%	Bales.	%
New South Wales ..	925,421	39.97	818,992	42.38
Victoria ..	690,867	29.84	(b)516,706	26.74
Queensland ..	374,883	16.19	306,943	15.89
South Australia ..	169,964	7.34	177,638	9.19
Western Australia ..	125,293	5.41	82,298	4.26
Tasmania ..	28,827	1.25	29,738	1.54
<b>Total ..</b>	<b>2,315,255</b>	<b>100.00</b>	<b>1,932,315</b>	<b>100.00</b>

(a) Including wool sold to local woollen mills, scourers, etc. (b) Including wool sold at Albury.

10. Exports and Local Sales of Wool, Australia, 1895 to 1923.—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 1923.**

Year ended 30th June.				Overseas 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

(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, but the figures for the past two selling seasons indicate a return to normal, especially when allowance is made for the shipment of "Bawra" wool already appraised in previous seasons.

11. 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, 1922-23.**

Description of Wool.	N.S.W.	Victoria. (a)	Q'land.	S. Aust.	W. Aust.	Tasmania.	Total.
	Bales.	Bales.	Bales.	Bales.	Bales.	Bales.	Bales.
Greasy ..	749,959	506,245	260,568	175,904	81,024	29,738	1,803,438
Scoured ..	69,033	10,461	46,375	1,734	1,274	..	128,877
Total ..	818,992	516,706	306,943	177,638	82,298	29,738	1,932,315
Fleece, etc. ..	772,145	479,700	293,465	163,125	75,704	28,671	1,812,810
Lambs' ..	46,847	37,006	13,478	14,513	6,594	1,067	119,505
Total ..	818,992	516,706	306,943	177,638	82,298	29,738	1,932,315
Merino ..	646,922	242,948	302,900	167,705	76,715	5,644	1,442,834
Crossbred and all strong breeds ..	172,070	273,758	4,043	9,933	5,583	24,094	489,481
Total ..	818,992	516,706	306,943	177,638	82,298	29,738	1,932,315

(a) Including wool sold at Albury.

WOOL.—LOCAL SALES, DESCRIPTIONS, 1922-23—*continued.*

Description of Wool.	N.S.W.	Victoria. (a)	Q'land.	S. Aust.	W. Aust.	Tasmania.	All States.
	%	%	%	%	%	%	%
Greasy .. ..	91.57	97.98	84.89	99.02	98.45	100.00	93.33
Scoured .. ..	8.43	2.02	15.11	0.98	1.55	..	6.67
Total .. ..	100.00	100.00	100.00	100.00	100.00	100.00	100.00
Fleece, etc. ..	94.28	92.84	95.61	91.83	91.99	96.41	93.82
Lambs .. ..	5.72	7.16	4.39	8.17	8.01	3.59	6.18
Total .. ..	100.00	100.00	100.00	100.00	100.00	100.00	100.00
Merino .. ..	78.99	47.02	98.68	94.41	93.22	18.98	74.67
Crossbred and all strong breeds ..	21.01	52.98	1.32	5.59	6.78	81.02	25.33
Total .. ..	100.00	100.00	100.00	100.00	100.00	100.00	100.00

(a) Including wool sold at Albury.

The great bulk of wool 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 1922-23 season amounted to over 93 per cent. Of fleece and lambs' wool, the former represented 93.82, and the latter 6.18 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, the bulk 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 during recent years. 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 74.67 in 1922-23, while crossbred declined from 33.89 to 25.33 per cent. during the same period. The requirements of the frozen 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 extraordinary 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.

12. 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 1922-23 :—

## WOOL.—LOCAL SALES, PERCENTAGES OF DESCRIPTIONS, 1922-23.

Description of Wool.	N.S.W.	Victoria.	Q'land.	S. Aust.	W. Aust.	Tasmania.	Total.
	%	%	%	%	%	%	%
Greasy .. ..	41.59	28.07	14.45	9.75	4.49	1.65	100.00
Scoured .. ..	53.57	8.12	35.98	1.34	0.99	..	100.00
Fleece, etc. ..	42.59	26.46	16.19	9.00	4.18	1.58	100.00
Lambs .. ..	39.20	30.97	11.28	12.14	5.52	0.89	100.00
Merino .. ..	44.84	16.84	20.99	11.62	5.32	0.39	100.00
Crossbred and all strong breeds ..	35.15	55.93	0.83	2.03	1.14	4.92	100.00

The bulk of the crossbred wool of Australia is grown in Victoria and the southern parts of New South Wales; Tasmania, where crossbred sheep largely predominate, coming 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 two 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 more adapted for the growth of a larger proportion of fine crossbred wool than the River Plate, South Africa, and other wool-growing countries, and it is probable that this process of refinement will lead ultimately to the exclusion of coarse wool-growing in Australia.

**13. The Wool Market.** (i) *The 1922-23 Season.* Despite the disturbed state of affairs on the Continent, there was a strong wool market throughout the 1922-23 season, and clearances of the bulk of the seasons's production were effected at payable rates. Merino wool realized high values up to the closing sales, and the demand for other wools was very favourable. Large purchases of crossbred wool were made on English and American account, and crossbred was also bought by the Continent and by Japan. At first only the finer grades of this wool were in demand, but in the end the coarsest grades alone were unsaleable.

The 1922-23 clip showed the influence of the dry autumn and generally unfavourable conditions ruling throughout the season. The bulk of the staple, while fine in quality, was light in condition, and somewhat thinly grown and dusty.

During the year the wool sold in Australia totalled 1,932,315 bales, and though this quantity represented a decrease of 294,443 bales on the previous season's sales, there was an increase in the amount realized of no less than £8,942,078, the returns aggregating a value of £46,238,801 as compared with £37,296,723 in the previous year. The average price per bale was £23 18s. 7d. These figures show the excellent selling conditions throughout the year. The improvement, moreover, was even greater than the figures reveal, since not only was the demand keenly sustained for all the best descriptions, and the range of prices the highest ever met with at auction in Australia, but there was a marked development in inquiries for the lower grades which in the previous year were practically unsaleable.

Although exceptionally high prices were realized during the 1922-23 season, the actual top price for greasy merino was 2d. per lb. below that of 1921-22, and 9d. per lb. below the record of 1920-21, when 49½d. was reached. The season's record for merino fleece was 40½d., reached by the Ware (conj.) brand sold in the Geelong market, a centre which has now secured premier position at Australian wool sales for three successive seasons. With the exception of greasy and scoured merino fleece and scoured crossbred fleece, new records were established in all other descriptions. The Geelong market excelled in highest prices, securing no less than nine records, whilst Brisbane obtained three, and Sydney two. The highest prices for the past nine seasons for wools sold at auction, or fixed by appraisalment at selling centres in Australia, are as follows:—

**RECORD PRICES OBTAINED FOR WOOL IN AUSTRALIAN MARKETS, 1914-15  
TO 1922-23.**

Description.	Price.	Brand.	Bales.	Selling Centre.	Season.
<b>Greasy merino :</b>	<i>d.</i>				
Fleece ..	49½	Ware (conj.) ..	5	Geelong ..	1920-21
Broken ..	34½	R/Langiwilli ..	5	Geelong ..	1922-23
Pieces ..	31½	HPM/Trawalla ..	9	Geelong ..	1922-23
Bellies ..	30½	Ware (conj.) ..	6	Geelong ..	1922-23
Locks ..	17½	RL in dia/Padthaway ..	8	Geelong ..	1922-23
Lambs ..	41½	Ware (conj.) ..	2	Geelong ..	1922-23
<b>Greasy comeback :</b>					
Fleece ..	38½	WTA/Boorook ..	9	Geelong ..	1922-23
Lamb ..	28	WTA/Boorook ..	6	Geelong ..	1922-23
<b>Greasy crossbred :</b>					
Fleece ..	34½	Marsden/Blayney ..	7	Sydney ..	1922-23
Lamb ..	24½	Leslie Manor ..	7	Geelong ..	1922-23
<b>Scoured merino :</b>					
Fleece ..	64	WG/Kedron ..	58	Brisbane ..	1920-21
Pieces ..	48	Clare Valley/P Co. (in ½ circle) ..	17	Brisbane ..	1922-23
		Molesworth ..	5	Brisbane ..	"
Lambs ..	48	M/Beaconsfield ..	1	Brisbane ..	1922-23
<b>Scoured crossbred :</b>					
Fleece ..	40½	O'Beirne/Linton ..	..	Geelong ..	1917-18

(ii) *Wool Realization Scheme.* The British Australian Wool Realization Association Ltd. ("Bawra") was formed on the 27th January, 1921, for the purpose of selling in conjunction with the existing clip 50 per cent. of the Australian carry-over wool acquired by the Association on account of the Australian growers; also to dispose of as agents all carry-over wools owned by the British Government and consisting of New Zealand, Falkland Islands, South African and 50 per cent. of Australian wools as promptly and to the best advantage as market conditions would permit, while at the same time contributing to stabilize the wool market which had become demoralized on the return to free wool sales. 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.

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. amounting to 2,691,756 bales was sold in three and a half years, and passed into consumption together with the current clips of the wool growing countries. The details of stocks and disposals are set out in the following table :—

**STOCKS AND DISPOSALS OF B.A.W.R.A. WOOLS, 1st JANUARY, 1921—2nd MAY, 1924.**

Description.	Stocks, 1st January, 1921.	Disposals.				
		1921.	1922.	1923.	To 2nd May, 1924.	Total Disposals, 1st January, 1921, to 2nd May, 1924.
	Bales.	Bales.	Bales.	Bales.	Bales.	Bales.
Australian :—						
Merino .. ..	904,180	484,031	345,710	73,694	89	903,524
Crossbred .. ..	931,825	176,199	274,632	319,146	162,297	932,274
New Zealand :—						
Merino .. ..	3,181	449	267	2,333	132	3,181
Crossbred .. ..	769,762	138,441	275,855	308,428	47,069	769,793
Falkland Islands ..	2,329	2,329	..	..	..	2,329
South African ..	(a) 80,550	..	80,655	..	..	80,655
Grand Totals ..	2,691,827	801,449	977,119	703,601	209,587	2,691,756

(a) 1st January, 1922.

NOTE.—The differences in the totals of stocks and disposals is due to reclassification and reconditioning.

14. *United Kingdom Importation of Wool.*—The appended statement of the quantity and value of wool imported into the United Kingdom during the year 1922 from the principal wool-producing countries shows the important position which Australia occupies in the supply of wool to the mother country :—

**WOOL.—IMPORTS, UNITED KINGDOM, 1922.**

Country from which imported.	Quantity.	Value.	Country from which Imported.	Quantity.	Value.
	lbs.	£		lbs.	£
Australia ..	518,781,500	27,479,227	Belgium ..	9,660,900	580,973
New Zealand ..	359,256,200	15,764,218	Peru ..	5,929,400	188,874
Union of South Africa ..	154,548,700	7,431,326	Uruguay ..	5,522,700	294,767
India ..	95,620,500	2,044,947	U.S. of America	3,835,100	247,957
Argentina Re-public ..	65,193,400	2,218,841	Falkland Islands	3,735,300	167,905
France ..	27,201,400	1,482,495	Turkey ..	3,080,100	85,958
Chile ..	24,744,000	1,063,518	Other Countries	21,158,900	675,521
			Total ..	1,298,268,100	59,726,527

Of the importations of wool into the United Kingdom, Australian wool represented 40 per cent. of quantity and 46 per cent. of value, and New Zealand 28 per cent. of quantity and 26 per cent. of value. It is interesting to note that 1,131,942,200 lbs., valued at £52,887,623, were received from British Possessions, being 87 per cent. of the total weight imported and 89 per cent. of the total value.

## § 6. Trade in Hides and Sheepskins.

1. *Extent of Trade.*—In addition to the hides and sheepskins treated in the tanneries of the several States, a very considerable export trade is carried on, the value of cattle hides and sheepskins exported from Australia during the five years 1918-19 to 1922-23 amounting to £14,156,025, or an average of £2,831,205 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 £9,263,125. The largest purchaser of sheepskins with wool is the United Kingdom, to which more than 71 per cent. of the consignments were dispatched during the last five years. France ranked next in order of importance with 19 per cent., while the remaining 10 per cent. was shipped principally to Belgium and the United States of America. The exports of sheepskins with wool during each of the years from 1918-19 to 1922-23 were as follows:—

### SHEEPSKINS WITH WOOL.—EXPORTS, AUSTRALIA, 1918-19 TO 1922-23.

Particulars.	1918-19.	1919-20.	1920-21.	1921-22.	1922-23.	Total for 5 years.
Sheepskins (with wool) .. No.	6,005,291	6,046,122	4,478,853	7,270,660	9,610,335	33,411,261
Value .. .. £	1,845,057	1,967,354	1,155,643	1,346,582	2,948,489	9,263,125

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 nearly 90 per cent. of the exports during the past five years, the purchases of the United States of America alone amounting to 63 per cent. of the total shipments. Particulars concerning exports are as follows:—

### SHEEPSKINS WITHOUT WOOL.—EXPORTS, AUSTRALIA, 1918-19 TO 1922-23.

Particulars.	1918-19.	1919-20.	1920-21.	1921-22.	1922-23.	Total for 5 years.
Sheepskins (without wool) .. No.	794,065	4,177,084	704,296	116,553	1,150,739	6,942,737
Value .. .. £	96,056	631,445	86,663	6,880	78,630	899,674

4. *Hides.*—(i) *Exports.* The export of Australian cattle hides, though not so important as in pre-war years, is still considerable, and marked increases were recorded during the past two years. The trade is mainly with the United Kingdom and the United States of America, which countries took one-half and one-fourth respectively of the total quantity exported during the past five years. Italy with 163,000, and Germany and Belgium with shipments amounting to 137,000 and 117,000 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, 1918-19 TO 1922-23.**

Particulars.	1918-19.	1919-20.	1920-21.	1921-22.	1922-23.	Total for 5 years.
Cattle Hides .. No.	259,386	569,465	261,938	446,199	651,888	2,188,876
Value .. .. £	566,720	1,504,116	375,412	530,355	773,691	3,750,294

The calfskins exported during the years 1918-19 to 1922-23 numbered 414,424, valued at £242,932, shipped mainly to the United States of America, the value of the skins taken by that country averaging 81 per cent. of the total exports during the past five years. The annual export of horse hides is very small, and averaged only 1,323 hides, valued at £1,805.

(ii) *Imports.* The import trade in cattle hides and calfskins is expanding and, with the exception of 1919-20, increases have taken place in the number imported during each of the last five years. New Zealand supplies the great bulk of these importations, and shipments of limited quantities are also obtained from the Pacific Islands. The number and value of cattle hides, including calfskins, imported into Australia during the five years 1918-19 to 1922-23 are as follows :—

**CATTLE HIDES.—IMPORTS, AUSTRALIA, 1918-19 TO 1922-23.**

Particulars.	1918-19.	1919-20.	1920-21.	1921-22.	1922-23.	Total for 5 years.
No. .. ..	260,237	205,662	313,442	451,373	675,471	1,906,185
Value .. .. £	424,339	579,915	500,460	433,014	541,079	2,478,807

The number of horse hides imported into Australia is unimportant. Imports during the last five years numbered 16,497, valued at £19,154.