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MINISTRY OF AGRICULTURE AND FISHERIES

Report on the
**ORGANIZATION OF
WOOL MARKETING**

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THE ORGANIZATION OF WOOL MARKETING.

INTRODUCTION.

The following Report is the second to be published, in the Economic Series, on the subject of wool marketing. The first* was largely confined to a descriptive survey of marketing methods. The present Report not only takes a wider view of the subject, but aims at presenting, as a basis for consideration, the outline of a constructive programme of marketing organization. With this object in view, the first part of the Report surveys and analyses the traditional methods of wool marketing and the post-War enterprises in collective marketing in this country. Detailed consideration is then given to the two forms that organized wool marketing has taken overseas. The first is central auction selling in the Southern Dominions, which is now a highly developed system depending on the co-ordination of the interests of producers, selling brokers and buyers, all of whom are organized. The second is to be found in the United States and Canada, where large-scale co-operative societies, operated on national basis, undertake the assembly, preparation for market and sale of the wool.

The type of organization most appropriate to a particular country depends largely upon the prevailing conditions of production and demand. But it is possible, from analysis and comparison of experience abroad, to detect the fundamental principles in efficient marketing and to draw valuable lessons for the industry here. The Report concludes with a suggested plan of development, which might take the line of a gradual evolution from regional organization to a national marketing scheme.

* Economic Series No. 7.

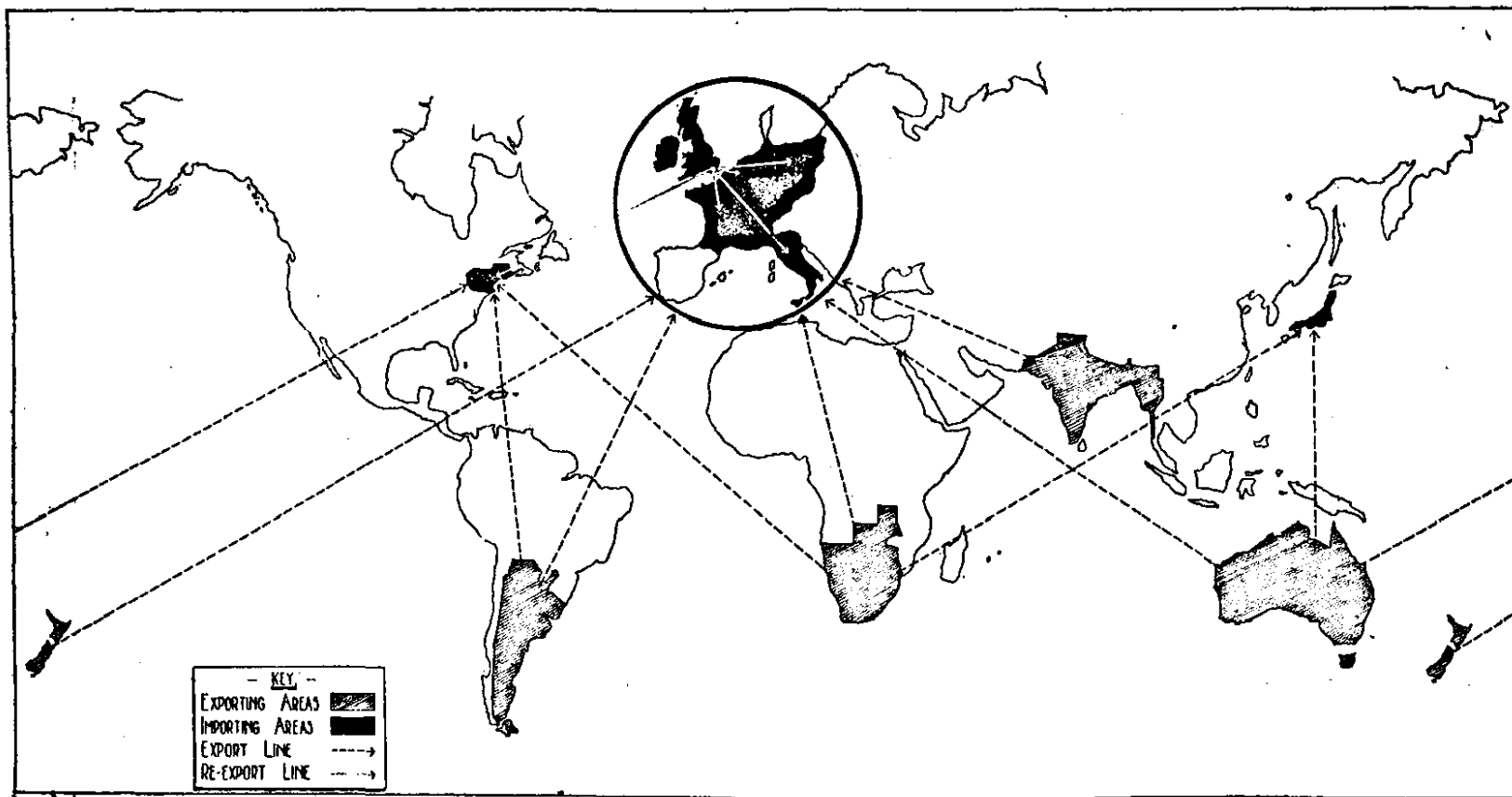


FIG. 1.—The World's Chief Wool Exporting and Importing Areas.

APPENDIX A.

THE MARKETING OF SKIN WOOLS.

As shown in Table IV (page 131), the average annual production of skin wool in England and Wales is just over 20 million lb., or about 30 per cent. of the average aggregate production of wool. The farmer is not directly concerned with the marketing of this very substantial volume of wool, since it is a by-product of the slaughtering industry. Nevertheless, the efficiency with which skin wool is marketed is of importance to the farmer from two standpoints. The returns which the butcher gets from skins partly determine the price paid for the live animal. Moreover, the available volume and relative cost of skin wool to the consuming industry has a direct bearing on the demand for fleece wool. Skin wool has a wide range of uses: it may be sufficiently long for blending in a top, though normally it is used for blending with fleece wool and waste in the blanket trade and in sections of the woollen trade, and therefore can be an effective substitute for fleece wool.

The separation of the wool from the skin is done by fellmongers. Although some of the fellmongers sell in bulk to a wool merchant or a firm specializing in the sale of skin wool, the majority of them classify the skin wool and sell by private treaty to manufacturers. In the grading of skin wool, breed is largely obscured, since the wool does not come off in one piece and graded skin wool more resembles matchings than graded fleece wool. The buyer bases his valuation on length and fineness of staple, softness of handle and colour. In grading, it is usual to keep lamb, hog and ewe wool separate, and subdivide further into pick, super and fine under such broad classification as Down, Northern Counties, Midland Counties, etc.

Much of the west of England skin wool is sold at fairs held in March and September at Bristol. Fellmongers bring in samples, on the basis of which offers are made by brokers and merchants. Where a good connexion between buyer and seller has been established, sale may be done on sample. Thus, a number of fellmongers in the north of England are members of the Bradford Wool Exchange and conduct their sales by sample. In general, however, the great variation in the get-up of the wool, taken in conjunction with variety in quality and length of staple, tend to promote private dealings on an inspection basis rather than on sample. Usually, buyers visit the fellmonger's yard and come to terms after the wool has been examined.

Although the marketing of skin wool at present is not within the scope of producer-controlled marketing in this country, the position would be different if slaughtering were centralized. Bulk handling at central abattoirs would enable the most modern methods of processing skins to be introduced, and the employment of expert graders and salesmen would be economic in view of the large volume of supplies available at one centre.

APPENDIX B.

REGULATIONS FOR THE EXPORT OF WOOL FROM THE UNION OF SOUTH AFRICA.

Regulations for the Export of Wool, 15th August, 1930. (Issued under the Agricultural Products Export Act, 1917, the Agricultural Produce Grading Act, 1922, and the Agricultural Industries Advancement Act, 1925.)

1. From and after the 1st of October, 1930, wool intended for export shall be subject to inspection as hereinafter provided.
2. (a) On every bale or package of wool exported from the Union on and after the 1st of October, 1930, an inspection fee of one halfpenny ($\frac{1}{2}$ d.) shall be paid by the owner or consignor of such wool.
(b) Any such fee shall be paid at the time of export to the Railways and Harbours Administration by the consignor, who shall have the right of recovery from the original owner or producer concerned.
3. Any inspector, appointed for the purposes of these regulations, shall have the right of free access to premises in which wool intended for export is stored and to open the number of bales necessary for purposes of inspection.
4. (a) All wool exported from the Union of South Africa shall be contained in the jute pack, known as "The 11 $\frac{1}{4}$ -lb. pack (nominal)."
(b) Each such pack shall be legibly marked with the name and address of the consignor.
5. Only *blue tinted* sewing twine or metal clips shall be used for the sewing up of bales, or any cuts or holes which have been made in bales.
Where this regulation has not been complied with, the inspector shall insist on all sewing twine being carefully removed and bales re-sewn in the prescribed manner at the expense of the owner or the consignor or his agent.
6. (a) All bales of wool which contain unskirted fleeces must be distinctly and legibly marked "Unskirted." For purposes of this regulation, "unskirted fleeces" will mean fleeces from which the bellies and locks and pieces have not been removed.
(b) All bales of "Outsortings" (Bellies, Pieces and Locks) must be distinctly and legibly marked according to contents with the following marks: CBP or KPS, BP or PS and LOX.
7. Any re-marking necessitated by non-observance of the regulations shall be done by the owner, consignor or his agent at his own expense.
8. (a) The inspector shall reject any bales of wool which contain foreign matter introduced into the wool during or subsequent to shearing. Such bales may, after repacking and removal of such foreign matter, again be submitted for inspection.
(b) Any repacking consequent upon such rejection shall be done by the owner or consignor or his agent at his own expense.
9. All markings on bales in terms of these regulations shall be placed together on the front of the bale, and shall consist of letters not less than one inch in height.

APPENDIX C.

RECOMMENDATIONS OF THE SOUTH AFRICAN WOOL COUNCIL,
1930.*

Your Committee is convinced and strongly feels that the lack of uniformity of marketing methods to-day found in the various markets is extremely disadvantageous to the wool industry.

1. For these reasons your Committee recommends that, with the sanction of the Minister of Agriculture, the Wool Trade be notified that uniformity of marketing methods, incorporating the system detailed in recommendations 2 and 4 below, is highly desirable in the interests of the most efficient marketing of our wool, and that all efforts should be made to attain this within a period of twelve months.

2. Your Committee recommends that the system by which wool should be marketed should be :—

That all wool must be offered for sale by public auction at least once, and if withdrawn from sale under reserve, it should be free to be sold out of hand, but that special machinery should be established which can function in abnormal times or when certain circumstances necessitate it in the interests of the industry.

3. Your Committee recommends that the Wool Council should issue an authoritative and strong recommendation to wool producers to support sales by public auction, by instructing their broker to sell their wool by that system.

4. Your Committee further recommends that steps should be taken in collaboration with the trade to inaugurate a system of public records. Under this system, all wool offered for sale, whether by public auction or by private-treaty sale, must be displayed under satisfactory conditions and be available for inspection by buyers ; and all particulars of all transactions, private treaty as well as public auction, should be lodged at the office of the wool inspector on the day after the sale at an hour to be agreed upon, and these should be available for public inspection.

5. Your Committee recommends that the Wool Council should approach the Woollselling Brokers' Association of South Africa in an effort to secure their co-operation for ensuring that no wool broker shall be allowed to buy or sell wool until he shall have been registered as either a wool-selling or a wool-buying broker. A wool-selling broker should under no circumstances be a wool-buying broker too.

Registration should be conditional, and no wool-selling broker should be eligible for registration until he has handled a minimum quantity of wool either through his own or through an existing registered organization.

This minimum quantity should be determined after further investigation.

Registration should not be renewable if a wool-selling broker has failed during two successive years to attain the minimum.

6. Your Committee is convinced that centralization of marketing by means of co-ordination of markets whereby offerings can be regulated according to programme is a very desirable end. We think, however, that this should be a more gradual development and should not be forced through straight away.

7. Your Committee recommends that further thorough investigations should be conducted on the necessary steps to secure a lengthening of the selling season so as to avoid the extreme rush period. If possible this should

* "Marketing of Wool in South Africa." Report of Wool Council Committee in collaboration with Division of Agricultural Economics and Markets (Wool Council No. 2).

be consummated by organizing the shearing activities in certain areas where climatic and other conditions allow of earlier or later shearing.

8. Your Committee wishes to strongly recommend wool producers to support the experiments being made on binning of wool as much as they possibly can.

9. Your Committee recommends that the Wool Council should appoint a Standing Committee from amongst its members which—

- (a) will co-operate with the Association of Wooselling Brokers of South Africa in order to promote and secure uniformity in methods of marketing ;
- (b) will, as circumstances dictate, function for the Wool Council, and report at the following meeting of the Council ;
- (c) will be available for any purposes that may arise from time to time for the more efficient marketing of our wool.

10. Your Committee recommends that the following matters be referred to the proposed Standing Committee for further investigation, as it is felt that the information obtained by us is insufficient to arrive at a considered opinion thereon :—

- (a) The proposed regulation to prohibit shipment of wool other than in the name of the buyer, with a view to eliminating pieing.
- (b) The desirability of supplanting the existing system of basing invoices on " inweights " by that of basing them on " outweights."
- (c) The desirability of inaugurating the " dial " system of auction sales.
- (d) The advantages or disadvantages associated with wool brokers supplying their own auctioneers as against the selling of wool by public auction conducted by a general auctioneer.
- (e) The relative merits of fixed order of sales and the system of rotation of order of selling.
- (f) The determination of the minimum quantity of wool to be handled which should form the basis of the condition of registration of wool-selling brokers (*see* recommendation 8).
- (g) The effects of forward selling.

APPENDIX D.

THE SOUTHERN SASKATCHEWAN WOOL GROWERS' ASSOCIATION: PRODUCERS' AGREEMENT.

1. The Producer covenants and agrees to deliver at such points, times and in such manner as the Association shall from time to time direct, all the wool grown or acquired by or for the Producer either directly or indirectly during the term of this contract, save and except such wool as the Producer requires for his own use; and that he will not (save as herein permitted) sell or otherwise dispose of any wool grown or acquired by him during the life of this agreement to any person or persons, firm or corporation other than this Association.

2. (a) This contract shall come into force in its entirety if the Directors of the Association are satisfied that contracts have been signed between producers of wool in Canada and either Canadian Co-operative Wool Growers, Limited, or any Association deemed by the said Directors to be similar in purpose to the Association for the marketing during the current year of an amount of wool estimated to be not less than three million (3,000,000) pounds, and being so satisfied send to the producer a notice in writing by mail in a properly addressed and prepaid envelope declaring this contract to be in force.

(b) This contract shall remain in force for three years from the day it comes into force in its entirety, and thereafter from year to year until determined by either party giving to the other in the month of January notice in writing terminating the same, and thereupon this contract shall cease and determine.

3. The Association will make all proper provision for the payment of all transportation and handling charges of all wool after its delivery at the specified shipping point, and for its insurance, and for its classification as Eastern Domestic, Western Range or Western Domestic, as these terms are understood in the trade, and for grading such wools according to quality, character and condition, and for preparing the same for market and for its storage; and will market the same at such times and in such manner and upon such terms as it deems in its discretion necessary and expedient for the purpose of getting the best price therefor, and will pay to the Producer his proportion of the proceeds so realized after deducting therefrom the advances (if any) made by the Association to the Producer, and the due proportion of all transportation, handling, marketing and other costs and expenses attributable to the Producer in respect of his said wool, and any sum payable in respect of the growers' wool on account of the reserves payable under any contract which the Association may make with any other Association or Company for the marketing of wool, and any sum due from the member to the Association under the Constitution, Articles of Association and by-laws of the Association for his contribution to the expenses of the Association.

4. The Association may mix the Producer's wool with that of other producers of similar grade, and may pool the Producer's wool with that of any other growers, and may permit any other Association, Company or Agency to mix the Producer's wool with any other wool of similar grade, and to pool the Producer's wool with any other wool.

5. (1) The Producer appoints and constitutes the Association as his agent, factor, mercantile agent within the meaning of the Factor's Act, and attorney in fact for all the purposes aforesaid, and without detracting from the generality of the foregoing empowers the Association, in its own name and on its own account:—

- (a) To receive, insure, classify, grade, store, ship, transport and sell wool, and
- (b) To employ and pay brokers and to enter into contracts with any other person, body or association for the marketing of wool on such terms as it may think proper, and to make any expenditure it may deem necessary for that purpose.
- (c) To borrow money on the wool delivered to it or any warehouse or storage receipt, or on any accounts for the sale thereof, or on any

drafts, bills of lading, bills of exchange, notes, acceptances, orders or on any commercial paper delivered therefor, and to exercise all rights of ownership without limitation, and to pledge such wool or receipts or accounts or drafts, bills of lading, notes, acceptances, orders or other commercial paper as security or collateral therefor ; and

(d) To apply the money so received *pro rata* among the Producers who have executed agreements similar in nature to these presents and have delivered wool to it, or to use the said money for any proper purpose or activity of the Association deemed by the Directors to be in the best interests of its members.

(2) It is hereby agreed and declared that the agency hereby created shall be irrevocable during the subsistence of this contract.

6. The Association agrees at the request of the Producer to make a cash advance to the Producer upon all wool delivered by the Producer pursuant to this contract of such an amount as the Association may from time to time determine, as soon as practicable after delivery thereof.

7. The Association may from time to time prescribe rules and regulations as to the shipment and handling of wool, and the dates in each year between which all wool subject to this agreement shall be delivered and the points at which such delivery shall be made, and the Producer hereby agrees that such rules and regulations shall be binding upon him as if the same had been embodied in this contract.

8. The Producer shall notify the Association immediately he creates any incumbrance upon any of his wool giving full particulars thereof, and the Association may, as agent for the Producer, take delivery of any wool so incumbered and pay off the incumbrance and reimburse itself out of any money payable to the Producer on account of any wool delivered to the Association on account of the Producer.

9. The Producer will supply the Association in writing, whenever requested so to do, information as to the number of his flock and other matters as may be required by the Association for the purpose of estimating wool production.

10. Inasmuch as the remedy at law would be inadequate, and it is now and ever will be impracticable and difficult to determine the actual damage resulting to the Association and the members thereof in the event of the Producer failing to deliver his said wool in accordance with this contract, the Producer hereby agrees to pay the Association Five Cents (5 c.) per pound for each pound of wool delivered, sold, consigned, marketed, withheld or disposed of in contravention of the provisions of this contract, all parties agreeing that this contract is one of a series dependent for its true value upon the faithful performance of each such contract by all and every of the parties to all such contracts.

11. The Producer agrees that in the event of the breach by him of any material provision hereof, particularly as to delivery or marketing of any wool otherwise than through the Association, the Association shall upon proper action in ~~the~~ by it be entitled to an injunction to prevent any further or ~~as a~~ ~~rather~~ ~~each~~ hereof, and other equitable relief according to the terms of ~~Up~~ ~~of~~ ~~Stat.~~, and the Association and the Producer expressly agree that this ~~is~~ not a contract for personal services or one demanding exceptional ~~of~~ ~~or~~ ~~talent~~ ; and that this is a contract of agency coupled with financial ~~in~~ ~~est~~ under special circumstances and conditions and that the Association cannot practicably and without great difficulty go into the open markets and secure wool to replace any which the Producer may fail to deliver ; and that this contract will be the proper subject for the remedy of specific performance in the event of a breach thereof.

APPENDIX E.
WOOL GRADING STATEMENT.
LIVE STOCK BRANCH, OTTAWA.

Prov.....Ass'n.....SHIPPER'S LOT No.....
 WESTERN DOMESTIC.....WESTERN RANGE EASTERN DOMESTIC
 Member's nameAddress
 Weight Railroad Bill of LadingNo. of SacksCondition
 of SacksGross Weight at GradingTare
 Net Weight

Grade.	Corresponding English Counts.	Bright.		Semi-Bright.		Dark.		Revenue
		lb.	Price	lb.	Price	lb.	Price	
Fine Staple ...	} 64's-70's-84's }							
Fine Clothing ...								
Fine Med. Staple	} 58's-60's }							
Fine Med. Clothing								
Medium Staple ...	} 56's ... }							
Medium Clothing								
Low Med. Staple ...	} 48's-50's }							
Low Med. Clothing								
Low Staple ...	} 44's-46's }							
Low Clothing ...								
Lustre ...	} 40's-44's }							
Coarse ...								
Grey and Black :—								
Fine ...								
Medium ...								
Coarse ...								
Seedy and Burry :—								
Fine ...								
Medium ...								
Heavy ...								
Cotts :— Hard ...								
Soft ...								
Dead :— Fine ...								
Medium...								
Damaged ...								
Tags :— Fine ...								
Medium...								
Odd Grades ...								
Total								

STANDARD GRADES.

REJECT GRADES.

substituted as his agent,
 and attorney
 City

Date received.....Date GradedManager
 Weigher.....Grader.....

Remarks :—
 Note.—Generally speaking, wool of strong fibre and over 2 in. in length is classed as Staple and under 2 in, as Clothing.

APPENDIX F.

NOTE ON U.S.A. WOOL GRADE TERMS.

In 1926, wool grade terms used in the United States were correlated with the terminology in use in this country. In the past, and to a considerable extent to-day, domestic wools in the United States were known by terms which originally related to the supposed proportion of merino blood in the sheep from which they were shorn. To-day, these terms have largely lost significance in the sense in which they were first used, and may now be broadly considered to represent:—

<i>U.S.A. Old Terminology.</i>				<i>Wool Type.</i>
Fine (Delaine)	...	...	...	Merino
$\frac{1}{8}$ blood	...	...	...
$\frac{1}{4}$ blood	...	...	...	Fine crossbred,
$\frac{1}{2}$ blood	...	...	...
Low quarter blood	...	...	...	Medium crossbred.
Common	...	...	...
Braid	...	...	...	Coarse crossbred or carpet.

The actual correlation with Bradford terms arrived at by negotiation between wool interests in both countries reads as follows:—

<i>Old Terminology.</i>				<i>New Terminology.</i>
Fine (Delaine)	...	...	...	80's 70's 64's
$\frac{1}{8}$ blood	...	...	...
$\frac{1}{4}$ blood	...	...	...	60's 58's 56's
$\frac{1}{2}$ blood	...	...	...
Low quarter blood	...	...	...	50's 48's
Common	...	...	...
Braid	...	...	...	46's 44's 40's 36's

Samples representing the grades are held by the United States Department of Agriculture and the Bradford Chamber of Commerce, and are known as Official Standards of the United States for Grades of Wool and Wool Tops. These standards should be regarded, however, not as "standard grades," but as a rationalization of grade terms. For the purpose of incorporation in the United States' Government market reports, certain sub-divisions, based on length of staple, are recognized though they have not been officially prescribed.

CHECKED

202204

FARMERS!

BE ON THE MARK

SELL ON THE MARK

BUY ON THE MARK

YOUR TRADE MARK

THE NATIONAL MARK

