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SUMMARY OF THE WHEAT SITUATION

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Prepared under instructions from the Honorable the Treasurer

by

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ACTING COMMONWEALTH STATISTICIAN.

13th November, 1944.

NOTE:- Owing to war-time conditions, this Summary is issued at less frequent intervals than formerly. The last issue (Volume 7, No.2.) was released on 28th July, 1943. This is the third of the series to be included under Volume 7 and subsequent numbers will appear from time to time as circumstances require.

1. AUSTRALIA : ESTIMATED WHEAT AREA AND YIELD, 1944-45.

(a) AREA: On the annual returns collected in April and May, 1944, farmers throughout Australia indicated that they intended to sow 9,152,000 acres with wheat for all purposes (grain, hay and green food) in the 1944-45 season. In all cases this was subject to the reservation "weather and other conditions permitting". At the corresponding time in 1943 farmers' intentions to sow wheat for all purposes aggregated 9,170,000 acres with like reservation as to weather and conditions. Weather conditions in the sowing period of 1943 were not generally favourable and acute manpower difficulties existed. Final returns indicated that farmers actually sowed 8,603,000 acres with wheat for all purposes in 1943 or approximately 600,000 acres less than the "intended" area.

In 1944, severe drought conditions prevailed throughout the sowing period in the principal wheat districts of three of the four main producing States, (New South Wales, Victoria and South Australia) and the shortage of manpower continued. Although farmers' intentions to sow in 1944 were approximately the same as their intentions in 1943, it seems probable that the total area actually sown with wheat this season (1944-45) will be appreciably less than the total of 8,603,000 acres sown for all purposes last year (1943-44). Beyond that, continuance of severe drought in the areas mentioned above indicates that the total area actually harvested for grain in 1944-45 will be substantially less than the area of 7,860,000 acres harvested for grain in 1943-44. The production goal set for 1944-45 was 9 million acres for grain.

(b) YIELD: The total of preliminary forecasts made by the various State and Commonwealth authorities of the wheat grain yield in the 1944-45 season is in the vicinity of 50 million bushels, the lowest crop since the 1919-20 season when the yield was 46 million bushels.

These estimates are subject to revision in November and December. Final estimates will not be available until harvesting and deliveries are completed in the early part of 1945.

2. AUSTRALIA : AREA, PRODUCTION AND AVERAGE YIELD, 1943-44.

The total area sown to wheat for all purposes during 1943-44 season was 8.6 million acres as compared with 10.1 million acres for 1942-43. Details for these years are shown hereunder:-

AUSTRALIA : WHEAT SOWN (ALL PURPOSES)

(Thousand acres)

Particulars	N.S.W.	VIC.	QLD.	S.A.	W.A.	Tas.	A.C.T.	AUSTRALIA
1942-43:								
For Grain ..	3,033	2,145	335	2,009	1,753	4	1	9,280
" Hay ..	287	68	11	153	101	2	-	622
" Greenfeed	66	(a)	91	15	24	1	-	197(b)
All Purposes:	3,386	2,213(c)	437	2,177	1,878	7	1	10,099(d)
1943-44:								
For Grain ..	2,693	1,793	281	1,534	1,552	5	2	7,860
" Hay ..	198	72	7	120	115	4	-	516
" Greenfeed	84	(a)	80	22	40	1	-	227(b)
All Purposes:	2,975	1,865(c)	368	1,676	1,707	10	2	8,603(d)

(a) Not available. (b) Excluding Victoria. (c) Excluding Green Feed.
(d) Excluding Green Feed, Victoria.

The production of wheat in Australia for the season 1943-44 was 109,559,000 bushels. This represents an average yield of 3.94 bushels obtained from 7,860,000 acres sown for grain during that season which is substantially below the record average yield of 16.78 bushels per acre recorded in 1942-43.

The decline of 4.2 million acres from 1941-42 to 1943-44 was due to the continued restriction of wheat sowings under the Wheat Stabilisation Plan referred to later.

Details of the area, production and average yield per acre for each of the five seasons ended 1942-43, the average for the ten seasons ended 1942-43 and for the season 1943-44 are given in the tables below.

AUSTRALIA : AREA SOWN TO WHEAT FOR GRAIN.

(Thousand Acres)

Year	N.S.W.	VIC.	QLD.	S.A.	W.A.	TAS.	A.C.T.	AUSTRALIA
1938-39	4,651	2,748	442	3,080	3,413	10	2	14,346
1939-40	4,381	2,827	361	2,735	2,970	7.5	2	13,284
1940-41	4,454	2,673	322	2,560	2,626	8	2	12,645
1941-42	3,969	2,757	(a)350	2,326	2,653	6.4	1	12,063
1942-43	3,033	2,145	335	2,009	(b)1,753	4	1	9,280
Average Ten Years ended 1942-43	4,126	2,607	310	2,893	2,750	13	2	12,701
1943-44(c)	2,693	1,793	281	1,534	1,552	5	2	7,860

(a) Estimated. (b) Area licensed was compulsorily reduced by one-third.
(c) Subject to revision.

AUSTRALIA : PRODUCTION OF WHEAT.

(Thousand Bushels)

Year	N.S.W.	VIC.	QLD.	S.A.	W.A.	TAS.	A.C.T.	AUSTRALIA
1938-39	59,898	18,104	8,584	31,674	36,844	205	59	155,368
1939-40	76,552	45,054	6,585	41,072	40,861	108	45	210,277
1940-41	23,933	13,522	5,687	17,856	21,060	140	35	82,233
1941-42	48,500	46,954	(a)8,000	30,511	37,500	145	23	166,633
1942-43	51,693	41,803	5,005	36,525	20,600	73	28	155,727
Average Ten Years ended 1942-43	52,591	36,247	4,604	32,423	30,224	282	41	156,412
1943-44(b)	47,500	19,733	5,089	20,691	16,385	122	39	109,559

(a) Estimated. (b) Subject to revision.

AUSTRALIA : WHEAT PRODUCTION - AVERAGE YIELD PER ACRE.

Year	N.S.W.	VIC.	QLD.	S.A.	W.A.	TAS.	A.C.T.	AUSTRALIA
	bus.	bus.	bus.	bus.	bus.	bus.	bus.	bus.
1938-39	12.88	6.59	19.42	10.28	10.79	20.84	28.74	10.83
1939-40	17.48	15.93	18.27	15.02	13.76	14.37	18.54	15.83
1940-41	5.37	5.06	17.66	6.97	8.02	17.46	17.09	6.50
1941-42	12.22	17.03	(a)8.57	13.12	14.13	17.92	17.64	13.81
1942-43	17.04	19.49	14.95	18.16	11.75	17.76	24.88	16.78
Average Ten Years ended 1942-43	12.75	13.91	14.84	11.21	10.99	21.60	21.53	12.31
1943-44(b)	17.64	11.01	18.11	13.49	10.56	24.40	19.50	13.94

(a) Estimated. (b) Subject to revision.

3. CLASSIFICATION OF LICENCES ISSUED, AREA LICENSED AND DELIVERIES.

A comparison of the areas licensed for the growing of wheat for grain and the area actually sown in the several States during the seasons 1942-43 and 1943-44 is given in the following table:-

WHEAT FOR GRAIN : AREA LICENSED AND AREA SOWN.

State	Season 1942-43			Season 1943-44		
	Area Licensed	Area Sown	Percentage Sown	Area Licensed	Area Sown	Percentage Sown
	thous.ac.	thous.ac.	%	thous.ac.	thous.ac.	%
New South Wales	3,667	3,033	82.71	3,692	2,693	72.94
Victoria	2,614	2,145	82.06	2,395	1,794	74.91
Queensland	447	335	74.94	474	281	59.28
South Australia	2,415	2,009	83.19	2,132	1,534	71.95
Western Australia	1,818	1,753	96.42	1,950	1,552	79.59
Tasmania	5	4	80.00	4	5	125.00
Australian Capital Territory	2	1	50.00	2	1	50.00
TOTAL:	10,968	9,280	84.61	10,649	7,860	73.81

In the following table the number of licences issued in 1941-42 and the areas licensed are classified according to size. This table has been compiled from data

/obtained

obtained from the Wheat Industry Stabilisation Board. As explained in the footnotes, the particulars shown for the various States are not strictly comparable. Similar details for subsequent years are not available.

**LICENCES ISSUED IN 1941-42 & AREAS LICENSED - CLASSIFIED
ACCORDING TO ACREAGE GROUPS**

(Source - Wheat Industry Stabilisation Board)

Acreage Groups	Particulars	Unit	N.S.W. (a)(b)	VIC. (b)	QLD. (c)	S.A. (d)	W.A. (e)	TAS. (d)	TOTAL
1 - 49	Licences ..	No.	1,886	1,929	706	2,962	597	377	8,457
	Area Licensed	Thous.Ac.	49	50	17	75	18	6	215
50 - 99	Licences ..	No.	1,980	2,043	972	2,945	761	16	8,717
	Area Licensed	Thous.Ac.	144	146	58	210	55	1	614
100 - 149	Licences ..	No.	2,471	2,045	600	2,690	847	2	8,655
	Area Licensed	Thous.Ac.	298	241	62	320	101	1	1,023
150 - 199	Licences ..	No.	2,196	1,648	273	1,998	693	2	7,010
	Area Licensed	Thous.Ac.	361	269	41	335	154	-	1,160
200 - 249	Licences ..	No.	2,489	1,918	207	1,573	990	1	7,176
	Area Licensed	Thous.Ac.	550	410	39	340	218	-	1,557
250 - 299	Licences ..	No.	1,862	1,125	101	983	1,143	1	5,215
	Area Licensed	Thous.Ac.	492	296	26	262	310	-	1,386
300 - 499	Licences ..	No.	4,151	2,507	238	1,763	3,222	1	11,902
	Area Licensed	Thous.Ac.	1,490	927	84	644	1,229	-	4,374
500 - 999	Licences ..	No.	1,229	760	127	438	1,476	-	4,030
	Area Licensed	Thous.Ac.	746	466	75	272	955	-	2,516
1,000 & Over	Licences ..	No.	106	53	21	32	207	-	419
	Area Licensed	Thous.Ac.	139	73	26	39	309	-	566
TOTAL:	Licences ..	No.	18,370	14,028	3,245	15,404	10,136	400	61,583
	Area Licensed	Thous.Ac.	4,271	2,878	428	2,497	3,349	6	13,431

(a) Includes A.C.T. (b) Original licences only tabulated; share-farming licences are omitted. (c) Registrations apparently tabulated, not licences. (d) Original and share-farming licences tabulated. (e) Registrations tabulated.

Acreage figures for basic year's acreage, not licensed acreage.

The number of growers delivering wheat in 1942-43 and their deliveries into No.6 Pool are classified in the following table according to size groups. This table is based upon data compiled by the Australian Wheat Board. Wheat grown in one State and delivered in another has been tabulated according to State of delivery, hence the excess of growers and deliveries recorded in Victoria compared with New South Wales.

**NUMBERS OF GROWERS DELIVERING WHEAT & QUANTITY DELIVERED SEASON 1942-43
CLASSIFIED ACCORDING TO SIZE GROUPS.**

(Source - Australian Wheat Board)

Quantity Delivered Bushels	Particulars	Unit	N.S.W.	VIC.	QLD.	S.A.	W.A.	TAS.	TOTAL
Up to 1,000	Growers ..	No.	3,060	2,692	1,171	2,514	1,888	64	11,369
	Quantity delvd.	Thous.Bus.	1,677	1,521	569	1,330	966	17	6,080
1,001 - 1,500	Growers ..	No.	1,742	1,312	328	1,260	863	4	5,509
	Quantity delvd.	Thous.Bus.	2,163	1,632	406	1,560	1,072	5	6,656
1,501 - 2,000	Growers ..	No.	1,572	1,240	222	1,106	733	-	4,873
	Quantity delvd.	Thous.Bus.	2,736	2,155	385	1,924	1,267	-	6,467
2,001 - 2,500	Growers ..	No.	1,456	1,000	179	1,004	610	-	4,249
	Quantity delvd.	Thous.Bus.	3,260	2,254	402	2,255	1,372	-	9,551
2,501 - 3,000	Growers ..	No.	1,581	1,069	108	997	620	-	4,375
	Quantity delvd.	Thous.Bus.	4,377	2,959	399	2,712	1,711	-	12,058
3,001 - 4,000	Growers ..	No.	2,465	1,749	132	1,674	956	-	6,976
	Quantity delvd.	Thous.Bus.	6,409	5,943	450	5,746	3,190	-	23,738
4,001 - 5,000	Growers ..	No.	1,329	997	78	903	455	-	3,762
	Quantity delvd.	Thous.Bus.	5,937	4,482	347	4,009	2,042	-	16,817
5,001 - 6,000	Growers ..	No.	615	650	52	570	285	-	2,372
	Quantity delvd.	Thous.Bus.	4,456	3,574	265	3,140	1,559	-	13,014
6,001 & over	Growers ..	No.	1,372	1,798	127	1,320	533	-	5,150
	Quantity delvd.	Thous.Bus.	11,649	16,402	1,248	12,011	4,765	-	46,075
TOTAL:	3,000 bushels & under -								
	Growers ..	No.	9,411	7,313	2,008	6,881	4,714	68	30,395
Quantity delvd.	Thous.Bus.	14,241	10,521	2,061	9,761	6,388	22	43,014	
Over 3,000 bushels -	Growers ..	No.	5,961	5,194	369	4,467	2,229	-	18,260
	Quantity delvd.	Thous.Bus.	30,451	30,401	2,330	24,906	11,556	-	99,644
GRAND TOTAL:	Growers ..	No.	15,392	12,507	2,397	11,348	6,943	68	48,655
	Quantity delvd.	Thous.Bus.	44,692	40,922	4,391	34,687	17,944	22	142,658

4. WEATHER CONDITIONS

In general, rains during the months of June to September, 1944, have been very deficient in the main wheat areas. Conditions are stated to be above average in Queensland and Tasmania, and only slightly below average in Western Australia; but for other States drought conditions prevail, particularly in the wheat belt area in North and North West Victoria and Southern portion of New South Wales and the adjoining parts of South Australia.

5. WHEAT PRICES

(i) Price of Wheat for Human Consumption (Australia): Since June, 1942, the monthly price of wheat sold for gristing into flour for home consumption has averaged 3/11½d. per bushel (Wheat Board price to millers - bulk basis).

(ii) Export Wheat Prices - Australia: Following the acquisition of the 1939-40 Australian crop by the Commonwealth Government, it was no longer possible to continue this table on the former basis of "Shippers' Limits f.o.r. ports". From November, 1939, the quotations are approximate but are comparable with prices quoted for previous months.

EXPORT WHEAT PRICES : AUSTRALIA.

(Pence per Bushel)

Month	1938(a)	1939(a)	1940	1941	1942	1943	1944
January ..	51.86	29.00	46.50	(47.75)	(50.00)	51.00	57.00
February ..	61.51	29.05	46.50	50.00	50.00	51.00	57.00
March ..	47.96	27.19	47.00	(50.00)	50.00	51.00	57.00
April ..	46.17	28.12	48.00	(50.00)	50.00	51.00	57.00
May ..	44.69	30.28	48.00	(50.00)	(50.00)	51.00	60.00
June ..	41.85	28.68	(48.00)	(50.00)	50.00	(51.00)	60.00
July ..	42.02	26.15	48.00	(50.00)	50.00	(51.00)	60.00
August ..	36.92	24.98	(47.25)	(50.00)	(50.00)	(51.00)	60.00
September ..	32.72	29.93	47.25	(50.00)	(50.00)	51.00	63.00(b)
October ..	33.58	32.00	47.75	(50.00)	(50.00)	51.00	
November ..	30.34	(32.00)	(47.75)	50.00	50.00	54.00	
December ..	28.96	35.50	47.75	(50.00)	50.00	57.00	
Average:	40.72	29.37	47.50	50.00	50.00	51.75	

The figures shown in brackets are nominal.

(a) Weighted average shippers' limits for growers' bagged and bulk lots, Sydney, Melbourne and Adelaide. (b) Subject to revision.

(iii) Price of Wheat to Farmers (Australia): A table giving details of advances paid to growers is included with Section 10(a) hereafter.

6. OVERSEA FREIGHT RATES.

Particulars of freight and charter rates on wheat from Australia to the United Kingdom and Continental Ports were given by months for a series of years in previous issues of this Summary (see No.6, Vol.5). As the relevant data are not now available, these tables will be discontinued until further notice.

7. EXPORTS OF WHEAT AND FLOUR.

Particulars of exports of wheat and flour from each State of Australia for the last five years are set out in the following table:-

Year ended 30th June	New South Wales	Victoria	Queens- land	South Australia	Western Australia	Tasmania	TOTAL
WHEAT							
(Thousand Bushels)							
1940	13,106	5,415	1,305	12,438	15,329	-	47,593
1941	9,722	3,974	-	18,407	14,854	-	46,957
1942	2,350	3,241	-	6,949	9,773	-	22,313
1943	3,419	6,654	-	7,333	5,138	-	22,544
1944	420	3,951	-	17,230	12,057	-	33,658
FLOUR							
(Ton : 2000 lbs.)							
1940	316,805	190,844	2,513	82,566	91,575	-	684,303
1941	307,020	272,390	3,429	70,536	118,530	-	771,905
1942	138,395	139,713	8	50,982	84,586	-	413,684
1943	101,638	115,879	5	46,581	77,616	-	341,719
1944	218,850	174,706	2,102	88,027	106,859	-	590,544

AUSTRALIA : EXPORTS OF WHEAT, 1939-40 TO 1943-44, CLASSIFIED
ACCORDING TO COUNTRIES OF DESTINATION.

Country to which Exported	QUANTITY					VALUE				
	1939-40	1940-41	1941-42	1942-43	1943-44	1939-40	1940-41	1941-42	1942-43	1943-44
	Thous. Bus.	Thous. Bus.	Thous. Bus.	Thous. Bus.	Thous. Bus.	£s.	£s.	£s.	£s.	£s.
United Kingdom ..	29,079	24,104	6,900	8,957	320	4,467,481	4,531,809	1,398,607	1,824,331	66,400
Ire ..	460	790	-	-	-	80,074	152,711	-	-	-
India ..	1,100	699	758	6,360	8,404	150,224	130,667	160,785	1,373,822	1,962,617
Malta ..	720	636	-	-	313	126,105	132,368	-	-	78,720
New Zealand ..	1,415	1,669	1,746	1,797	2,834	176,629	362,166	379,431	440,254	649,696
Union of South Africa ..	162	2,045	4,149	1,354	813	34,850	431,762	928,066	322,601	197,676
Other British Countries ..	225	1,709	1,779	1,997	6,347	38,028	382,669	344,006	432,528	1,654,526
Belgium ..	-	-	-	-	-	-	-	-	-	-
China ..	3,064	3,520	-	-	-	605,680	840,140	-	-	-
Egypt ..	212	1,105	3,496	-	3,705	36,126	209,798	694,015	-	930,917
France ..	1,163	-	-	-	-	207,533	-	-	-	-
Germany ..	-	-	-	-	-	-	-	-	-	-
Greece ..	2,463	6,472	-	-	-	-	-	-	-	-
Italy ..	-	-	-	-	5,637	439,395	1,267,440	-	-	-
Japan ..	6,371	3,751	268	-	-	995,288	706,618	68,080	-	1,368,206
Netherlands ..	-	-	-	-	-	-	-	-	-	-
Norway ..	279	-	-	-	-	55,559	-	-	-	-
Peru ..	-	-	-	-	-	-	-	-	-	-
For Orders, Lost at Sea ..	338	253	2,109	-	942	65,793	56,550	412,817	-	223,300
Other Foreign Countries ..	522	204	1,108	2,049	4,343	98,605	42,636	260,986	490,774	1,112,177
<u>TOTAL AUSTRALIAN PRODUCE:</u>	<u>47,593</u>	<u>46,957</u>	<u>22,313</u>	<u>22,544</u>	<u>35,658</u>	<u>7,557,370</u>	<u>9,247,836</u>	<u>4,644,793</u>	<u>4,884,310</u>	<u>8,264,235</u>

AUSTRALIA : EXPORTS OF FLOUR, 1939-40 TO 1943-44, CLASSIFIED
ACCORDING TO COUNTRIES OF DESTINATION.

(Ton = 2000 lbs.)

Country to which Exported	QUANTITY					VALUE				
	1939-40	1940-41	1941-42	1942-43	1943-44	1939-40	1940-41	1941-42	1942-43	1943-44
	Tons	Tons	Tons	Tons	Tons	£A.	£A.	£A.	£A.	£A.
United Kingdom ..	189,437	80,418	10,480	23,291	-	1,539,547	697,747	82,556	224,406	-
Aden ..	4,422	93	1,226	-	-	32,849	813	10,196	-	-
Borneo (British) ..	2,092	2,834	2,009	-	-	18,648	29,299	22,621	-	-
Ceylon ..	16,034	19,312	27,300	188,409	315,505	139,511	192,698	276,186	1,951,178	3,574,145
Cyprus ..	2,534	-	3,024	1,344	-	15,791	-	27,538	13,199	-
Fiji ..	4,671	4,598	7,269	7,217	7,087	33,705	46,371	77,062	78,764	80,160
Hong Kong ..	15,304	36,446	19,386	-	-	134,157	360,524	222,215	-	-
Malaya (British) ..	79,348	90,107	67,153	-	-	589,627	874,557	716,704	-	-
Malta ..	6,703	5,734	-	-	-	62,044	51,972	-	-	-
Mauritius ..	15,642	6,434	23,959	23,353	40,709	113,103	59,089	244,874	238,063	439,396
New Zealand ..	273	6,148	437	87	137	2,214	45,760	5,010	1,035	1,779
Papua ..	921	1,051	1,811	3,930	1,865	7,927	10,725	16,515	40,016	35,522
Sudan ..	23,803	3,114	11,068	-	-	167,072	29,345	94,752	-	-
Union of South Africa ..	1,745	2,421	7,566	9,712	256	12,172	23,068	80,420	106,436	3,114
Other British Countries ..	34,056	36,517	62,190	51,029	137,108	252,004	331,070	560,656	504,953	1,602,099
Africa, Portuguese East ..	7,113	6,232	5,862	-	78	53,711	61,858	67,466	-	875
Africa, Portuguese West ..	66	-	-	-	-	514	-	-	-	-
China ..	51,217	201,670	5,442	-	-	346,630	1,992,917	52,671	-	-
Egypt ..	32,842	43,909	50,765	13,949	56,881	261,916	394,415	462,875	136,955	626,969
French Indo-China ..	12,297	10,267	-	-	-	101,098	97,247	-	-	-
Japan ..	5	19,155	550	-	-	39	181,152	5,400	-	-
Madagascar ..	1,405	49	-	2,240	3,102	12,062	476	-	22,844	35,146
Manchuria including Kwantung										
Peninsula ..	13,242	35,677	-	-	-	81,725	373,970	-	-	-
Netherlands ..	810	-	-	-	-	4,376	-	-	-	-
Netherlands East Indies ..	109,161	114,144	70,547	-	5	628,322	1,135,715	795,535	-	120
New Caledonia ..	4,406	4,174	5,103	4,936	5,258	31,517	40,836	52,086	51,342	60,547
Other Pacific Islands, (Foreign) ..	3,428	4,283	5,057	4,494	6,306	27,691	43,150	53,264	49,134	70,991
Philippine Islands ..	29,519	18,839	7,473	-	-	223,352	182,313	82,391	-	-
Thailand (Siam) ..	9,974	9,301	2,741	-	-	73,509	89,224	32,770	-	-
Other Foreign Countries ..	9,832	8,776	15,266	7,728	16,245	64,451	80,621	149,587	76,115	166,416
TOTAL AUSTRALIAN PRODUCE:	684,303	771,905	413,684	341,719	590,544	5,231,485	7,427,132	4,191,382	3,494,440	6,699,299

7.
8. IMPORTS OF WHEAT AND FLOUR INTO THE UNITED KINGDOM.

Data not available.

9. PRODUCTION OF FLOUR, BRAN AND POLLARD.

The production of flour by flour mills in Australia during the year ended June, 1943, amounted to 1,055,000 tons of 2,000 lb., valued at £11,747,000. This quantity was milled from 52,700,000 bushels of wheat. Compared with the output of 1,127,000 tons in 1941-42, the production in 1942-43 decreased by 72,000 tons or by 6 per cent. The production for the year ended 25th June, 1944, is estimated at 1,444,000 tons, which represents an increase of 389,000 tons or 37 per cent. on the output recorded for 1942-43, and establishes a new record, surpassing the previous best in 1940-41 by 26,000 tons.

Particulars of the operations of flour mills in each State during 1942-43 are shown hereunder, together with details for Australia from 1939-40 to 1943-44.

OPERATIONS OF FLOUR MILLS - STATES, 1942-43.

Particulars	Unit	N.S.W.	VIC.	QLD.	S.A.	W.A.	T.A.S.	AUST.
Number of Mills	No.	52	35	10	35	18	9	159
Number of persons employed	No.	1,146	895	375	391	414	122	3,343
Wheat milled (quantity)	Thous. Bus.	18,736	15,140	5,231	4,761	5,993	763	50,644
Output of Flour	"	"	390	316	109	99	125	1,055
Output of Bran	"	"	75	64	22	20	25	3
Output of Pollard	"	"	65	65	23	22	27	4

Note: Ton = 2,000 lb.

AUSTRALIA: OPERATIONS OF FLOUR MILLS.

Particulars	Unit	1939-40	1940-41	1941-42	1942-43	1943-44(a)
Number of Mills	No.	107	171	163	159	156
Number of persons employed	No.	3,858	3,995	3,513	3,343	(b)
Wheat milled	Thous. Tons	67,428	69,242	56,476	50,644	69,318
Output of Flour	"	"	1,384	1,418	1,127	1,444
" " Bran	"	"	287	292	232	213
" " Pollard	"	"	304	314	244	229

Note: Ton = 2,000 lbs.

(a) Subject to revision.

(b) Not yet available.

The following table shows the total production of flour in each State and the percentage exported overseas during each financial year from 1939-40 to 1943-44:-

Year ended June-	Unit	N.S.W.	VIC.	QLD.	S.A.	W.A.	T.A.S.	AUSTRALIA
1940 - Production	Thous. Tons	584	404	88	147	141	19	1,364
% Exported	%	54.3	47.2	24.8	56.3	64.7	-	49.4
1941 - Production	Thous. Tons	578	453	89	131	150	17	1,418
% Exported	%	53.1	60.2	34.9	55.7	79.1	-	54.4
1942 - Production	Thous. Tons	449	312	93	118	135	20	1,127
% Exported	%	30.9	44.8	-	43.4	62.5	-	36.7
1943 - Production	Thous. Tons	390	316	109	99	125	16	1,055
% Exported	%	26.0	36.7	-	47.0	62.2	-	32.4
1944 - Production	Thous. Tons	561	427	130	151	159	16	1,444
% Exported	%	32.0	40.9	1.6	56.3	67.3	-	40.9

Note: Ton = 2,000 lb.

In continuation of the annual data given in the tables above, details of production are shown below in four or six weekly periods for the year ended 25th June, 1944. Stocks held by mills on the dates indicated are also included. In the succeeding table the operations of Grain Mills are shown by States for each of the five years ended 1943-44 and in periods of four or six weeks for the latter year.

AUSTRALIA: PRODUCTION & STOCKS OF FLOUR, BRAN & POLLARD, 1943-44.

(Ton = 2,000 lbs.)

Four or Six Weeks ended -	Wheat Milled bus.	Production of -			Mill Stocks held on date shown		
		Flour tons	Bran tons	Pollard tons	Flour tons	Bran tons	Pollard tons
1943:							
25th July	4,422,960	92,145	18,886	19,815	74,760	1,882	1,982
22nd August	4,428,144	92,253	18,910	19,841	80,978	1,882	1,860
19th September	4,837,344	100,778	20,656	21,075	67,589	2,512	2,234
17th October	5,009,040	104,355	21,389	22,441	56,439	2,948	2,013
28th November	7,847,520	163,490	33,508	35,158	79,722	3,042	1,507
26th December	5,429,664	113,118	23,164	24,325	64,570	1,988	1,095
1944:							
23rd January	5,160,664	107,518	22,037	23,120	59,591	1,473	1,156
20th February	5,600,016	116,667	23,912	25,038	70,772	1,528	1,366
19th March	5,594,640	116,555	23,889	25,064	69,419	1,365	1,167
16th April	5,427,984	113,083	23,177	24,317	74,163	1,040	1,040
28th May	6,307,728	193,911	39,744	41,700	72,931	1,506	1,612
25th June	6,252,144	190,253	28,696	28,010	67,035	1,259	1,443
Total for Year ended 25th June, 1944:	69,318,048	1,444,126	295,998	310,554	-	-	-

AUSTRALIA : WHEAT MILLED AND PRODUCTION OF FLOUR, BRAN AND POLLARD,

1932-40 TO 1943-44.

(Ton = 2,000 lbs.)

Period	N.S.W.	VIC.	QLD.	S.A.	W.A.	T.S.	TOTAL
WHEAT MILLED							
	Th.Bus.	Th.Bus.	Th.Bus.	Th.Bus.	Th.Bus.	Th.Bus.	Th.Bus.
1939-40	28,646	19,688	4,416	7,009	6,715	954	67,428
1940-41	28,402	22,125	4,472	6,200	7,176	867	69,242
1941-42	22,949	15,678	4,664	5,695	6,467	1,023	56,476
1942-43	18,736	15,140	5,231	4,761	5,993	763	50,644
1943-44 (a) ..	26,946	20,510	6,225	7,254	7,619	764	69,318
Four wks. ended 25/ 7/43	1,636	1,317	485	386	538	61	4,423
" " " 22/ 8/43	1,665	1,305	455	384	560	59	4,428
" " " 19/ 9/43	1,828	1,404	492	462	599	52	4,837
" " " 17/10/43	1,878	1,499	486	502	593	51	5,009
Six " " 28/11/43	3,059	2,290	752	779	893	75	7,848
Four " " 26/12/43	2,109	1,596	457	561	630	57	5,430
" " " 23/ 1/44	2,036	1,612	433	491	546	43	5,161
" " " 20/ 2/44	2,160	1,729	489	609	559	55	5,600
" " " 19/ 3/44	2,158	1,671	458	657	598	53	5,595
" " " 16/ 4/44	2,171	1,615	390	635	551	66	5,428
Six " " 26/ 5/44	3,726	2,667	800	1,067	901	107	9,308
Four " " 25/ 6/44	2,520	1,786	528	681	651	85	6,251
FLOUR PRODUCED							
	Tons	Tons	Tons	Tons	Tons	Tons	Tons
1939-40	563,566	404,064	89,036	146,770	141,520	18,690	1,383,850
1940-41	577,759	452,812	88,651	131,325	149,925	17,057	1,417,729
1941-42	448,529	312,147	92,609	117,642	135,336	20,735	1,127,200
1942-43	390,331	315,425	108,672	99,197	124,849	16,313	1,055,087
1943-44 (a) ..	561,377	427,298	129,681	151,119	156,720	15,931	1,444,126
Four wks. ended 25/ 7/43	34,088	27,443	10,101	8,047	11,208	1,258	92,145
" " " 22/ 8/43	34,684	27,194	9,482	8,001	11,672	1,220	92,253
" " " 19/ 9/43	38,080	29,243	10,246	9,633	12,484	1,092	100,778
" " " 17/10/43	39,121	31,225	10,135	10,449	12,353	1,072	104,355
Six " " 28/11/43	63,722	47,705	15,657	16,238	18,601	1,567	163,490
Four " " 26/12/43	43,928	33,244	9,523	12,094	13,121	1,208	113,118
" " " 23/ 1/44	42,407	33,560	9,030	10,235	11,380	886	107,518
" " " 20/ 2/44	44,997	36,004	10,187	12,682	11,654	1,143	116,667
" " " 19/ 3/44	44,965	34,819	9,533	13,694	12,463	1,081	116,555
" " " 16/ 4/44	45,229	33,647	8,124	13,219	11,473	1,391	113,063
Six " " 26/ 5/44	77,623	55,980	16,670	22,659	18,765	2,234	193,911
Four " " 25/ 6/44	52,533	37,214	10,993	14,168	13,546	1,779	130,253
BRAN PRODUCED							
	Tons	Tons	Tons	Tons	Tons	Tons	Tons
1939-40	115,331	85,061	13,973	33,070	34,372	5,301	287,114
1940-41	112,309	96,789	14,380	28,533	35,006	4,862	291,679
1941-42	87,673	67,736	14,644	25,099	31,342	5,729	232,223
1942-43	79,053	63,867	21,672	20,090	25,263	3,304	213,269
1943-44 (a) ..	115,057	87,576	26,591	30,976	32,532	3,264	295,998
Four wks. ended 25/ 7/43	6,986	5,625	2,071	1,649	2,297	258	18,866
" " " 22/ 8/43	7,109	5,573	1,846	1,640	2,392	250	18,910
" " " 19/ 9/43	7,805	5,394	2,100	1,975	2,558	224	20,656
" " " 17/10/43	8,019	6,400	2,067	2,142	2,532	219	21,399
Six " " 28/11/43	13,060	9,778	3,209	3,328	3,612	321	33,508
Four " " 26/12/43	9,003	6,814	1,952	2,478	2,690	247	23,184
" " " 23/ 1/44	8,692	6,882	1,851	2,098	2,333	167	22,037
" " " 20/ 2/44	9,222	7,380	2,088	2,600	2,388	234	23,912
" " " 19/ 3/44	9,215	7,136	1,854	2,807	2,555	222	23,869
" " " 16/ 4/44	9,270	6,896	1,664	2,710	2,352	285	23,177
Six " " 26/ 5/44	15,909	11,473	3,416	4,641	3,647	458	39,744
Four " " 25/ 6/44	10,767	7,627	2,253	3,908	2,776	365	26,696

(a) Subject to revision.

/POLLARD

2.

AUSTRALIA : WHEAT MILLED AND PRODUCTION OF FLOUR, BRAN AND POLLARD,
1939-40 TO 1943-44. (Continued)
(Ton = 2,000 lb.)

Period	N.S.W.	VIC.	QLD.	S.A.	W.A.	TAS.	TOTAL
<u>POLLARD PRODUCED</u>							
	Tons	Tons	Tons	Tons	Tons	Tons	Tons
1939-40	131,965	92,720	23,351	27,055	25,766	3,026	303,883
1940-41	133,700	100,106	23,808	25,159	28,571	3,040	314,384
1941-42	101,281	68,514	23,853	21,181	25,739	3,763	244,331
1942-43	84,763	68,487	22,945	21,827	27,098	3,558	228,658
1943-44(a)	120,717	91,886	27,897	32,496	34,133	3,425	310,554
Four wks. ended 25/ 7/43	7,331	5,901	2,172	1,731	2,410	270	19,615
" " " 22/ 8/43	7,458	5,848	2,042	1,721	2,510	262	19,841
" " " 19/ 9/43	8,189	6,268	2,208	2,071	2,684	235	21,675
" " " 17/10/43	8,413	6,714	2,180	2,247	2,656	231	22,441
Six " " 28/11/43	13,702	10,258	3,368	3,492	4,000	338	35,158
Four " " 26/12/43	9,446	7,149	2,048	2,600	2,822	260	24,325
" " " 23/ 1/44	9,119	7,221	1,941	2,201	2,447	191	23,120
" " " 20/ 2/44	9,676	7,742	2,191	2,272	2,507	245	25,088
" " " 19/ 3/44	9,669	7,488	2,050	2,945	2,680	232	25,064
" " " 16/ 4/44	9,726	7,236	1,747	2,842	2,467	299	24,317
Six " " 28/ 5/44	16,952	12,038	3,586	4,668	4,036	480	41,700
Four " " 25/ 6/44	11,296	8,003	2,364	3,051	2,914	362	28,010

(a) Subject to revision.

NOTE: The figures showing the quantities of wheat milled during the years 1939-40 to 1942-43 include also amounts used in the production of wheat products other than Flour, Bran and Pollard. Details of the quantities so included are not available but it is estimated that it would not exceed 1,500,000 bushels per annum.

10. STOCKS OF WHEAT.

End of season stocks of wheat grain (November, 1944) are forecast to be equivalent to approximately 75 million bushels while deliveries to the wheat pool (1944-45) are likely to be in the vicinity of 40 million bushels, indicating a total of 115 million bushels available for the year ended November, 1945.

11(a). GENERAL REVIEW : AUSTRALIA.

Wheat Industry Stabilisation Plan:

The Wheat Industry Stabilisation Plan again operated during the seasons 1942-1943 and 1943-44 and is to continue during 1944-45. The Plan provides for registration of farms and licensing of areas. The area allotted to each grower is fixed in proportion to the average sown during the basic four-year period or according to the rotational system adopted. In Western Australia, however, growers' acreages during 1942-43 were reduced compulsorily by one-third of the area sown in 1941-42. These restrictions continued in 1943-44 and 1944-45 to avoid undue accumulation of stocks in that State. Compensation was paid as was done in previous years. The amount of compensation for the seasons 1942-43, 1943-44 and 1944-45 is estimated to be £1,704,000.

Wheat Pool Advances:

Details of advances paid in respect of wheat acquired from the harvests of 1940-41 (No.4 Pool), 1941-42 (No.5 Pool), 1942-43 (No.6 Pool) and 1943-44 (No.7 Pool), are given in the table below.

Advances under the amended Wheat Industry Stabilisation Plan on wheat acquired from the 1942-43 and 1943-44 seasons (No.6 & 7 Pools) were made on a different basis from those of previous pools. In the case of No.6 Pool, licensed growers were paid 4/- per bushel for bagged wheat or 3/10d. per bushel for bulk wheat on deliveries up to 3,000 bushels. Licensed growers delivering in excess of that quantity received an advance of 2/- per bushel for bagged wheat or 1/10d. per bushel for bulk wheat on the excess quantity. A second payment of compensation on non-quota wheat at 1/- per bushel (bulk or bagged) has been made. Payment of initial compensation on wheat acquired for the 1943-44 season (No.7 Pool) was on the same basis, being increased by 1d. per bushel to cover the estimated increased cost for harvesting the 1943-44 crop due to the introduction of an Industrial Award for labour employed for this purpose.

It is estimated that the quantity receiving the higher advance rate was approximately 99 million bushels or 70 per cent. of the acquisitions in the No.6 Pool and 77,800,000 bushels or 82 per cent. in the No.7 Pool; the balances in each case receiving the lower rate.

AUSTRALIA : WHEAT POOL ADVANCES.

Advance	1940-41 Harvest (No. 4 Pool)		1941-42 Harvest (No. 5 Pool)		1942-43 Harvest (No. 6 Pool)		1943-44 Harvest (No. 7 Pool)	
	Bulk	Bagged	Bulk	Bagged	Bulk	Bagged	Bulk	Bagged
	s. d. per bus.	s. d. per bus.	s. d. per bus.	s. d. per bus.	s. d. per bus.	s. d. per bus.	s. d. per bus.	s. d. per bus.
First ..	(a)2.10.5	(a)3.0	(a)2.10	(a)3.0	(c)3.10	(c)4.0	(a)3.11.3	(c)4.1.3
Second ..	0.4	0.4	0.3	0.3	(d)1.10	(d)2.0	(d)1.11.3	(d)2.1.3
Third ..	0.3	0.3	0.4	0.4	(d)1.0	(d)1.0	-	-
Fourth ..	0.3	0.3	0.3	0.3	-	-	-	-
Final ..	0.0.75	0.1.25	-	-	-	-	-	-
Total Advances:	3.9.25	3.11.25	3.8	3.10	(b)2.10	(b)3.0	(b)1.11.3	(b)2.1.3
Total Amount Advanced:	£12,238,000		£28,848,000		£25,824,000		£17,405,000	
Quantity Acquired:	63,659,000 bus.		153,968,000 bus.		142,742,000 bus.		94,890,000 bus.	

(a) Including rail freight which was deducted from payment made to grower. (b) Total advance non-quota wheat to date. (c) Advance (net at country sidings) on first 3,000 bushels delivered by growers. (d) Advance (net at country sidings) on wheat in excess of first 3,000 bushels.

A small quantity of inferior wheat was excluded from the 1941-42 harvest and transferred from No.5 Pool to Pool No.5A, specially established for that purpose. An amount of about 3d. per bushel was docked on all wheat thus transferred.

Superphosphate:

The following table supplied by the Department of Commerce indicates the reduction in supplies of superphosphate for wheat crops in each of the main producing States between 1939-40 and 1943-44. The approximate quantity made available in 1944-45 is also shown.

SUPERPHOSPHATE USED FOR WHEAT CROPS (ALL PURPOSES)
MAIN PRODUCING STATES OF AUSTRALIA

Year	N.S.Wales	Victoria	S. Australia	W. Australia	TOTAL
	Tons	Tons	Tons	Tons	Tons
1939-40	81,700	85,200	98,400	136,000	401,300
1943-44	32,600	30,100	30,300	34,600	127,600
1944-45	28,000	24,000	33,400	31,000	114,400

Wheat for Stock Feed:

Wheat has been made available as stock and poultry fodder at 6d. per bushel less than the price obtained by the Australian Wheat Board. The Commonwealth Government is paying the difference in price with the object of encouraging the production of eggs and pig meats to meet the increasing demand for these commodities.

11(b). GENERAL REVIEW : A.B.R.O.D.

A Memorandum of agreement between the Governments of Argentina, Australia, Canada, the United Kingdom and the United States of America, which was the first step towards a comprehensive international wheat agreement, came into effect on 27th June, 1942. It provides for the convening of conferences of all nations having a substantial interest in wheat, whether as consumers or producers. In the meantime, the Memorandum requires, on the part of the four chief exporting countries, positive measures to control production. It also provides for the maintenance of a pool of wheat for inter-governmental relief in war-stricken and other necessitous areas as soon as the international situation permits. The quantity to be pooled is 100 million bushels and additional quantities are to be determined as the extent of the need becomes known. Canada, the United Kingdom and the United States have undertaken to contribute to this pool 25, 25 and 50 million bushels respectively.

In addition to measures of control and the provision of a relief pool, the draft convention provides for a large reserve of stocks, export quotas and minimum and maximum prices of wheat entering international trade. Export quotas to be assigned to the four chief exporting countries are - Canada, 40 per cent; United States, 16 per cent; Argentina, 25 per cent; and Australia, 19 per cent. The

/share

share of each country on an annual maximum export of 500 million bushels would be - Canada, 200 million bushels; United States, 80 million bushels; Argentina, 125 million bushels and Australia, 95 million bushels.

UNITED STATES OF AMERICA: The Australian Government Trade Commissioner in New York has supplied estimates of the 1944 wheat harvest as at 18th August, 1944. These estimates are compared with the figures for the previous years in the following table:-

UNITED STATES OF AMERICA : AREA AND PRODUCTION OF WHEAT.

Period	Area Harvested			Production		
	Winter	Spring	Total	Winter	Spring	Total
	Thous.ac.	Thous.ac.	Thous.ac.	Thous.Bus.	Thous.Bus.	Thous.Bus.
Average 10 Years,						
1929-38	39,453	17,416	56,869	571,000	184,000	755,000
1939	38,078	15,404	53,482	570,000	181,000	751,000
1940	36,147	17,191	53,338	589,000	228,000	817,000
1941	40,313	16,284	56,597	671,000	273,000	944,000
1942	36,300	15,500	51,800	698,000	283,000	981,000
1943	35,854	(a)14,700	50,554	564,000	272,000	836,000
1944 (Forecast)	45,200	21,400	66,600	786,000	346,000	(b)1,132,000

(a) Estimated. (b) All Time Record.

Canada: The first estimate of wheat acreages in Canada in 1944 forecasts an area of 23,800,000 acres compared with 17,487,700 acres in 1943, 21,587,000 in 1942 and 22,362,000 acres in 1941. The reduction in area in 1943 was consistent with the Canadian Government's intention to reduce substantially wheat sowings in that year. The 1944 acreage intentions of Canadian farmers as at 30th April indicated expansion of wheat acreage at the expense of oats, barley, flaxseed and summer fallow, according to the Dominion Bureau of Statistics. Wheat sowings are expected to increase by more than 6,000,000 acres.

The Dominion Bureau of Statistics reported on 27th July last that prospects for the 1944 wheat crop in Canada are much better than at this time one year ago. It is now estimated that 1944 production will be more than 50 per cent. higher than the 1943 figure.

Particulars of the areas and yields of wheat in Canada for recent years are given in the table below:-

CANADA : AREA AND PRODUCTION OF WHEAT.

Year	Area		Production	Average Yield per acre
	Harvested	Thous.Bus.		
	Thous.ac.	Thous.Bus.	Thous.Bus.	
1940	28,726	540,000	18.8	
1941	22,362	314,825	14.1	
1942	21,587	556,134	25.8	
1943	17,488	293,660	16.8	
1944	23,800	448,000	18.8	

ARGENTINA: The wheat harvest in Argentina amounted to 260,876,000 bushels in 1943-44 compared with 235,156,000 bushels in the previous year. Details of area and production are given in the table below for the years stated:-

ARGENTINA : AREA AND PRODUCTION OF WHEAT.

Year	Area		Production	Average Yield per acre
	Sown	Harvested		
	Thous.ac.	Thous.ac.	Thous.Bus.	
1939-40	17,833	12,753	131,000	10.26
1940-41	17,507	15,472	299,000	19.33
1941-42	18,038	14,254	224,000	15.71
1942-43	16,979	(a)	235,156	(a)
1943-44	16,768	(a)	260,876	(a)

(a) Not yet available.

FOUR CHIEF EXPORTING COUNTRIES: A summary of the area and production of wheat recorded in Argentina, Australia, Canada and the United States of America during the past five seasons is given in the following table with forecasts for the season now beginning.

FOUR CHIEF EXPORTING COUNTRIES : AREA AND PRODUCTION OF WHEAT.

Country	1939-40	1940-41	1941-42	1942-43	1943-44	1944-45(c)
	1939	1940	1941	1942	1943	1944
<u>AREA HARVESTED IN MILLION ACRES.</u>						
Argentina ..	12.8	15.5	14.3	(b)17.0	(b)16.8	(a)
Australia ..	1313	12.6	12.1	9.3	7.9	8.0
Canada ..	26.8	28.7	22.4	21.6	17.5	23.8
U. S. America	53.5	53.3	56.6	51.8	50.6	66.6
Total:	106.4	110.1	105.4	99.7	92.8	(a)
<u>PRODUCTION IN MILLION BUSHELS.</u>						
Argentina ..	131	299	224	235	261	(a)
Australia ..	210	82	167	156	110	50
Canada ..	521	540	315	556	294	448
U. S. America	751	817	944	981	836	1,132
Total:	1,613	1,738	1,650	1,928	1,501	(a)

(a) Not yet available. (b) Area sown. (c) Forecast.

Note: Fiscal years are applicable to countries of the Southern Hemisphere (Argentina and Australia); calendar years apply to those of the Northern Hemisphere.

INDIA: Details of the All-India wheat acreages and yields for 1944 and previous years are given in the following table:-

ALL-INDIA : AREA AND PRODUCTION OF WHEAT.

Year	Area	Production	Average Yield
	Thous.ac.	Thous.Busl.	per Acre
1940	34,003	402,567	11.84
1941	34,862	373,487	10.71
1942	33,979	375,913	11.06
1943	34,298	409,000	11.92
1944	33,740	361,250	10.77