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COMMONWEALTH BUREAU OF CENSUS AND STATISTICSCANBERRA A.C.T.SUMMARY OF THE WHEAT SITUATION : AUSTRALIAFEBRUARY, 1949Volume 7ContentsNo. 10Page No.

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by

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NOTE: The first issue of this Summary (Volume 7, No. 9) was released on 17th November, 1948. This is the tenth of the series to be included under Volume 7 and subsequent numbers will appear from time to time as circumstances require.

1. WHEAT FOR GRAIN : ESTIMATE OF AREA SOWN, PRODUCTION
AND AVERAGE YIELD, 1948-49

It is estimated that Australia's wheat crop for the 1948-49 season will total about 189,7 million bushels from 13,020,000 acres sown, representing an average yield of 14.56 bushels per acre sown for grain.

The estimated production of 189.7 million bushels for 1948-49 represents a decline of about 30.4 million bushels or 13.8 per cent. on the record output of the previous year but it is 35.3 million bushels or 22.9 per cent. above the average production for the five pre-war years ended 1938-39.

The area sown to wheat for grain in 1948-49 totalled 13.0 million acres - a drop of about 900,000 acres from the area recorded in 1947-48 - as compared with 12,98 million acres, the average for the five pre-war years ended 1938-39 and 18.2 million acres, the record area sown in 1930-31.

Details of the estimated area sown to wheat for grain, production and average yield for each State and for Australia for the year 1948-49 are shown in the table following together with the sources of these estimates.

TABLE 1 : WHEAT FOR GRAIN : ESTIMATED AREA, PRODUCTION
AND AVERAGE YIELD, 1948-49

State	Estimated Area Sown		Estimated Production			
	Authority	Area ('000 Acres)	Authority	Date	Pro- duction ('000 bush.)	Average Yield per acre (bush.)
N.S.W.	Government Statistician	4,280	Government Statistician	7. 2.49	66,000	15.42
Vic.	Government Statist (a)	3,100	Aust. Wheat Board	15. 2.49	48,000	15.48
Q'ld.	Wheat Industry Stabilization Board	630	Aust. Wheat Board	17. 2.49	14,100	22.38
S.A.	Government Statist	2,070	Government Statist	21.12.48	25,100	12.13
T.A.	Government Statistician	2,935	Government Statistician	10. 2.49	36,250	12.35
Tas.	Commonwealth Statistician	8	Commonwealth Statistician	10. 2.49	120	15.00
A.C.T.	Commonwealth Statistician	5	Commonwealth Statistician	10. 2.49	100	20.00
Total	-	13,020	-	-	189,670	14.56

(a) Estimate based upon area sown for all purposes.

2. WHEAT FOR GRAIN : AREA, PRODUCTION AND AVERAGE YIELD

Details of the area, production and average yield per acre are given in Table 2 following, for each of the four seasons ended 1947-48 in comparison with the average for the five seasons ended 1938-39. Details of the estimated areas sown, production and average yield per acre for the 1948-49 season are also shown.

TABLE 2 : WHEAT FOR GRAIN : AREA, PRODUCTION AND AVERAGE YIELD

A. AREA SOWN TO WHEAT FOR GRAIN

(Thousand Acres)

Year	N.S.W.	Vic.	Q'ld.	S.A.	W.A.	Tas.	A.C.T.	Aust.
Average five years ended - 1938-39	4,166	2,522	312	3,096	2,864	16	2	12,960
1944-45	2,845	2,142	332	1,623	1,516(a)	4	1	8,463
1945-46	3,774	3,251	392	2,165	1,836(b)	5	2	11,425
1946-47	4,475	3,501	243	2,519	2,426	8	3	13,180
1947-48	5,043	3,227	462	2,375	2,760	8	5	13,600
1948-49 (c)	4,200	3,100	630	2,070	2,935	8	5	13,028

(a) Compulsorily restricted by one-third.

(b) Voluntary restriction up to one-sixth of basic acreage.

(c) Estimated.

B. PRODUCTION OF WHEAT

(Thousand Bushels)

Year	N.S.W.	Vic.	Q'ld.	S.A.	W.A.	Tas.	A.C.T.	Aust.
Average five years ended - 1938-39	53,634	34,505	4,223	32,578	26,964	359	42	154,325
1944-45	17,134	3,498	6,981	9,244	15,929	92	2	52,800
1945-46	62,520	29,634	8,188	21,034	20,929	67	38	142,410
1946-47	15,682	48,971	705	27,906	23,800	139	59	117,262
1947-48	95,227	46,962	10,685	32,524	34,500	118	100	220,116
1948-49 (a)	66,000	48,000	14,100	25,100	36,250	120	100	189,670

(a) Estimated.

C. AVERAGE YIELD (BUSHEL) PER ACRE.

Year	N.S.W.	Vic.	Q'ld.	S.A.	W.A.	Tas.	A.C.T.	Aust.
Average five years ended - 1938-39	12.87	13.68	13.54	10.52	10.12	22.64	23.44	11.89
1944-45	6.02	1.63	21.00	5.70	10.51	24.18	1.22	6.25
1945-46	16.57	9.11	20.86	9.72	11.40	13.38	21.20	12.46
1946-47	3.50	13.99	2.84	11.08	9.81	18.47	18.09	8.90
1947-48	18.88	14.55	23.11	13.69	12.50	15.20	20.90	15.86
1948-49 (a)	15.42	15.48	22.38	12.13	12.35	15.00	20.00	14.56

(a) Estimated.

At the annual census of rural production collected during . . . and . . . farmers throughout Australia are asked to indicate their intentions to sow wheat for all purposes (grain, hay and green food) subject to the reservation "Weather and other conditions permitting". In the following table a comparison is given between farmers' intentions to sow and areas actually sown for the years indicated.

TABLE 3 : WHEAT ALL PURPOSES : AREA SOWN AND INTENTIONS TO SOW

(Thousand Acres)

Particulars	N.S.W.	Vic.	Q'ld.	S.A.	W.A.	Tas.	A.C.T.	Aust.
SEASON 1946-47								
Area Sown - For Grain	4,475	3,501	248	2,519	2,426	8	3	13,100
For Hay	264	65	10	134	203	4	1	586
For Greenfeed	35	-	44	9	21	1	-	110
All Purposes:	4,774	3,566	302	2,662	2,555	13	4	13,876
Area intended to be sown (All Purposes)	4,579	3,474	511	2,700	2,674	10	3	13,951
SEASON 1947-48								
Area Sown - For Grain	5,043	3,227	462	2,375	2,760	8	5	13,830
For Hay	278	52	7	106	77	3	1	524
For Greenfeed	34	-	45	5	26	1	-	113
All Purposes:	5,355	3,279	514	2,486	2,665	12	6	14,517
Area intended to be sown (All Purposes)	5,225	3,146	502	2,600	2,644	9	4	14,330
SEASON 1948-49								
Area Sown (a) -								
For Grain	4,200	3,100	630	2,070	2,935	8	5	13,028
For Hay	185	50	(b)	70	(b)	(b)	1	(b)
For Greenfeed	105	-	(b)	10	(b)	(b)	-	(b)
All Purposes)	4,570	3,150	(b)	2,150	(b)	(b)	6	(b)
Area intended to be sown (All purposes)	4,702	3,109	(c)	2,230	3,240	8	6	(d) 13,095

(a) Estimated, (b) Not yet Available, (c) Not collected, (d) Excludes Queensland.

4. AREAS LICENSED TO GROW WHEAT FOR GRAIN AND AREA SOWN

In the following table, the basic acreage (i.e. the area normally sown by growers, principally in the three years 1938-39 to 1940-41) and the area licensed to grow wheat for grain are shown for each State and the Australian Capital Territory, for the years 1946-47 to 1948-49, according to records of the Wheat Industry Stabilization Board. Details of the areas sown as well as the percentage that these areas bear to the area licensed are also given.

The Wheat Stabilization Board ceased to function in December, 1948 following the establishment of the post-war wheat stabilization plan. (Vide Section 15(a) following).

TABLE 4 : WHEAT FOR GRAIN : LICENSED AND SOWN (ACRES)

(Source : Wheat Industry Stabilization Board, (Thousand Acres)

Particulars	N.S.W.	Vic.	Q'ld.	S.A.	W.A.	Tas.	A.C.T.	Aust.
Basic Acreage	5,010	3,333	481	3,048	3,245	12	1	15,140
1946-47								
Area licensed (a)	5,540	4,087	618	3,240	3,364	4	3	16,856
Area sown	4,475	3,501	248	2,519	2,426	8	3	13,180
Area sown as a percentage of area licensed	81%	86%	40%	78%	72%	200%	100%	78%
No. of licences issued	No.	No.	No.	No.	No.	No.	No.	No.
issued	24,903	21,190	4,700	17,690	30,093	189	26	76,571
1947-48								
Area licensed (a)	6,100	3,723	671	3,050	3,477	6	5	17,032
Area sown	5,043	3,227	462	2,375	2,760	8	5	13,830
Area sown as a percentage of area licensed	83%	87%	69%	78%	79%	133%	100%	81%
No. of licences issued	No.	No.	No.	No.	No.	No.	No.	No.
issued	26,494	20,354	4,785	17,732	9,679	213	32	79,289
1948-49 (b)								
Area licensed (a)	5,843	3,431	747	2,801	3,648	(c)	5	16,475
Area sown (d)	4,280	3,100	630	2,070	2,935	8	5	13,028
Area sown as a percentage of area licensed (d)	73%	90%	84%	74%	80%	(c)	100%	79%
No. of licences issued	No.	No.	No.	No.	No.	No.	No.	No.
issued	25,338	19,297	5,292	17,227	10,072	(c)	24	77,310

(a) Includes areas temporarily licensed on wheat farms and areas of temporary wheat farms.

5. VARIETIES OF WHEAT SOWN

Details of the principal varieties of wheat sown and the percentage which each bears to the total area sown were included in the previous issue of this Summary (Vol. 7 No. 9) for the 1946-47 season in respect of the four main wheat producing Australian States, for the 1947-48 season in respect of South Australia and Victoria and for the 1948-49 season in Victoria.

6. WHEAT FARMS : NUMBER GROWING WHEAT FOR GRAIN ON 20 ACRES AND UPWARDS

Particulars of the number of farms growing wheat for grain on 20 acres and upwards during the years 1938-39, 1940-41, 1946-47 and 1947-48 are shown in the following table.

TABLE 5 : NUMBER OF FARMS GROWING WHEAT FOR GRAIN ON 20 ACRES AND UPWARDS

State	1938-39	1940-41	1946-47	1947-48
	No.	No.	No.	No.
New South Wales	16,550	15,831	15,971	16,803
Victoria	12,305	11,972	13,155	12,601
Queensland	3,190	2,169	2,006	2,923
South Australia	11,842	10,986	10,412	(b)
Western Australia	3,969	8,074	7,460	7,552
Tasmania	146	140	122	127
Total (a)	53,022	49,172	49,126	(b)

(a) Excludes Northern Territory and Australian Capital Territory. (b) Not yet available.

7. WHEAT PRICES : AUSTRALIA

(i) Price of Wheat for Home Consumption - Australia. From June, 1942, the monthly price of wheat sold for grinding into flour for home consumption averaged 3s.11½d. per bushel (Wheat Board price to millers, bulk basis) until 22nd December, 1947, when the price was increased to 4s. 11½d. per bushel, bulk basis. A further increase to 6s.3d. per bushel (bulk basis) operated from 19th January, 1948. The price of wheat for human consumption other than in flour also rose to 6s.3d. per bushel (bulk basis) on 19th January, 1948. The local consumption price was further increased to 6s. 8d. per bushel (bulk basis) as from 1st December, 1948.

(ii) Price of Wheat for Stock Feed - Australia. The price charged by the Wheat Board for wheat sold for stock feed was 4s.11½d. per bushel (bulk basis), from early in 1947 to 19th January, 1948, from which date it was increased to 6s.3d. per bushel. As with wheat for human consumption, the price was further increased to 6s.8d. per bushel (bulk basis) on 1st December, 1948.

(iii) Export Wheat Prices - Australia. Following the acquisition of the 1939-40 Australian crop by the Commonwealth Government, it was no longer possible to record prices on the former basis of "Shippers' Limits f.o.r. ports". From November, 1939 the prices shown below are approximate, being the basic export selling price of the Australian Wheat Board. The market is "broad" as wheat is sold at time above and below this basic price depending upon conditions of sale. Much of the wheat is sold at prices fixed under contract for delivery over lengthy periods.

TABLE 6 : EXPORT WHEAT PRICES : AUSTRALIA
(pence per bushel)

Month	1939 (a)	1944	1945	1946	1947	1948	1949
January	29.00	57.00	77.00	(116.00)	164.25	244.25	190.25
February	29.05	57.00	77.00	118.50	173.50	250.00	186.50
March	27.19	57.00	(b)	122.00	187.00	250.00	
April	28.12	57.00	(b)	122.00	194.00	250.00	
May	30.28	60.00	(b)	122.00	194.50	250.00	
June	28.63	60.00	(b)	122.00	196.00	237.00	
July	26.15	60.00	(b)	128.75	196.00	215.25	
August	24.98	66.00	(b)	134.00	196.00	208.25	
September	29.93	69.00	(b)	134.00	204.00	208.25	
October	32.00	75.00	(b)	143.00	219.75	194.25	
November	(32.00)	75.00	(b)	149.50	236.00	190.25	
December	35.50	75.00	116.00	164.00	238.00	190.25	
Average -	29.37	64.00	-	130.90	200.08	223.98	

The figures shown in brackets are nominal.

(a) Weighted average shippers' limits for growers' bagged and bulk lots, Sydney, Melbourne and Adelaide. (b) No sales.

8. POOL ADVANCES TO FARMERS ON WHEAT ACQUIRED

Details of advances paid in respect of wheat acquired from the harvests of 1945-46 (No. 9 Pool), 1946-47 (No. 10 Pool) and 1947-48 (No. 11 Pool) are given in the table below.

TABLE 7 : WHEAT POOL ADVANCES : AUSTRALIA.

As at 24th February, 1949

Advances	1945-46 Harvest (b) (No. 9 Pool)		1946-47 Harvest (b) (No. 10 Pool)		1947-48 Harvest (No. 11 Pool.)	
	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.
First	4. 1	4. 4	4. 1	4. 4	4. 6	5. 0
Second	1. 0(a)	1. 0(e)	1. 6(a)	1. 6(a)	2. 0(a)	2. 0(a)
Third	0. 6	0. 6	1. 0	1. 0	2. 0	2. 0
Fourth	0. 6	0. 6	1. 0	1. 3	2. 0(c)	2. 0(c)
Fifth	0. 1.75	0. 2.25	0. 5.5	0. 5.5	1. 6	1. 6
<u>Total Advances (a)</u>	6. 2.75	6. 6.25	8. 0.5	8. 6.5	12. 0	12. 6
Quantity Acquired	123,025,000 bus.		98,690,000 bus.		204,548,000 bus.	

- (a) Less freight.
- (b) Excludes amounts distributed from the Wheat Stabilization Fund. Refunds amounting to approximately ls. 1.5d. per bushel were made to growers in 1948 in respect of 1945-46 harvest (No. 9 Pool), and arrangements are completed for distribution early in 1949 of approximately 10.5d. per bushel in respect of 1946-47 harvest (No. 10 Pool).
- (c) This advance is not applicable to Pool 11A, which relates to a quantity of approximately 7 million bushels of low grade wheat (under 54 lb. per bushel) which has been segregated by the Wheat Board from other wheat received in No. 11 Pool.

An initial advance on bagged wheat of 5s. 6d. per bushel (less freight) and 5s. 0d. per bushel (less freight) on bulk wheat has been approved in respect of wheat delivered to the No. 12 Pool (1948-49 harvest).

9. OVERSEAS FREIGHT RATES : AUSTRALIA

The next table gives particulars of the charter rates for wheat shipped to the United Kingdom and Continental ports for the quarters in each of the years 1943 to 1948.

TABLE 8 : CHARTER RATES PER TON WEIGHT ON WHEAT

AUSTRALIA TO THE UNITED KINGDOM AND CONTINENTAL PORTS
(Supplied by the Overseas Shipping Representatives Assn.)

Quarter ended -	(a) 1943	(a) 1944	1945	1946	1947	1948
31st March :						
Eastern States	) 135.6	) 135.6	(120.0	(120.0	(120.0	) Bulk - 102.6
Western Australia			(110.0	(110.0	(110.0	
30th June :						
Eastern States	) 135.6	) 135.6	(120.0	(120.0	(120.0	) Bulk - 102.6
Western Australia			(110.0	(110.0	(110.0	
30th September :						
Eastern States	) 135.6	) 135.6	(120.0	(120.0	(120.0	) Bulk - 102.6
Western Australia			(110.0	(110.0	(110.0	
31st December :						
Eastern States	) 135.6	) 135.6	(120.0	(120.0	) 115.0	) Bulk - 95.0
Western Australia			(110.0	(110.0		

(a) Parcel rates.

10. PRODUCTION AND DISPOSAL OF WHEAT : AUSTRALIA

Details of the production and disposal of wheat in each of the cereal years ended 30th November, 1943 to 1948 and allocations for 1949 are given in the following table.

TABLE 9 : PRODUCTION AND DISPOSAL OF WHEAT : AUSTRALIA
(Million Bushels)

Particulars	Year ended 30th November						
	1943	1944	1945	1946	1947	(a) 1948	(b) 1949
Opening Stocks (incl. Flour as Wheat)	104.5	154.0	77.9	11.5	20.2	13.5	26.4
Production	155.7	109.7	52.9	142.4	117.3	220.1	(c) 109.7
<u>Total available supplies</u>	<u>260.2</u>	<u>263.7</u>	<u>130.8</u>	<u>153.9</u>	<u>137.5</u>	<u>233.6</u>	<u>216.1</u>
Exports - Wheat	18.6	54.3	6.1	19.4	12.0	87.0	) 120.6
Flour as wheat	18.6	36.9	12.9	37.7	34.0	44.6	
Local Consumption -							
Flour as wheat	34.3	34.5	33.1	32.2	33.5	33.6	33.7
Stock Food	20.3	40.7	44.9	24.4	22.2	20.7	22.0
Breakfast Foods and other uses	1.0	3.2	3.1	3.0	4.2	4.2	4.4
Seed	8.3	9.0	12.0	13.2	13.8	13.2	(c) 13.5
Balance retained on Farm (excl. Seed)	5.1	7.2	7.2	3.8	4.3	3.9	(c) 4.2
Closing stocks (incl. Flour as wheat)	154.0	77.9	11.5	20.2	13.5	26.4	17.7
<u>Total Disposals</u>	<u>260.2</u>	<u>263.7</u>	<u>130.8</u>	<u>153.9</u>	<u>137.5</u>	<u>233.6</u>	<u>216.1</u>

(a) Subject to revision. (b) Allocations. (c) Estimates.

11. STOCKS OF WHEAT AND FLOUR HELD.

The movement in stocks of wheat and flour as wheat held in Australia at Mills, Sidings, Ports and Depots as at 30th November, is shown in the following table for each State for the years 1939 to 1948 -

TABLE 10 : STOCKS OF WHEAT AND FLOUR AS WHEAT.
(Thousand Bushels)

30th November -	N.S.W.	Vic.	Q'ld.	S.A.	W.A.	Tas.	Aust.
1939	6,733	4,749	558	6,170	2,527	244	20,981
1940	20,803	17,007	1,196	20,708	17,295	388	77,477
1941	6,232	5,212	817	12,100	17,158	369	41,968
1942	16,055	28,211	344	25,276	33,589	1,054	104,529
1943	25,859	39,815	592	47,949	39,229	576	154,020
1944	19,090	19,359	450	20,401	16,181	396	77,877
1945	2,082	3,080	352	2,916	2,707	285	11,502
1946	11,854	3,722	1,016	1,900	1,618	97	20,207
1947 -							
Wheat	1,571	3,735	372	1,715	766	217	8,376
Flour (Tons)	30,244	47,242	4,001	9,400	15,132	1,089	107,108
Total as wheat	3,023	6,003	564	2,166	1,492	269	13,517
1948 -							
Wheat	13,102	3,227	1,273	3,890	583	386	22,461
Flour (Tons)	20,505	24,609	5,637	17,000	15,163	117	83,031
Total as wheat	14,086	4,408	1,544	4,706	1,311	392	26,447

NOTE - One ton of 2,000 lb. of flour is taken as the equivalent of 48 bushels of wheat.

12. PRODUCTION OF FLOUR, BRAN AND POLLARD

The following table shows details of the production of flour, in flour and other grain mills in each State for the year 1930-39, each year 1944-45 to 1947-48 and the periods of six months ended December, 1947 and 1948.

TABLE 11 : PRODUCTION OF FLOUR
(Ton = 2,000 lb.)

Period	N.S.W. tons	Vic. tons	Q'ld. tons	S.A. tons	W.A. tons	Tas. tons	Total tons
1940-41	577,759	452,812	88,351	131,325	149,925	17,057	1,417,729
1944-45	516,168	393,036	124,473	194,967	(a)	(a)	(b) 1,412,836
1945-46	451,395	315,525	96,904	164,986	166,791	22,657	1,218,838
1946-47	541,469	449,170	93,232	202,366	176,727	21,695	1,489,659
1947-48 (c)	528,340	477,048	99,353	207,390	188,113	21,938	1,522,182
Six months ended -							
Dec., 1947 (d)	209,493	249,074	51,249	107,708	98,445	11,398	727,367
Dec., 1948 (e)	337,694	232,349	53,858	108,316	101,456	11,814	845,487

(a) Not available for publication. (b) Including particulars for States marked (a).
(c) Subject to revision; 22nd June, 1947 to 19th June, 1948. (d) Subject to revision; 22nd June, 1947 to 20th December, 1947. (e) Subject to revision; 4th July, to 1st January, 1949.

Further details of the production and stocks of flour, bran and pollard and the quantity of wheat milled for years up to 1947-48 were included in the November, 1948 issue of the Wheat Summary, (Vol. 7, No. 9).

13. EXPORTS OF WHEAT AND FLOUR.

Table 12 furnishes details of the quantity of wheat and flour exported overseas by States for the year ended June, 1939 and each of the years ended June, 1945 to 1948, together with similar details for the periods of six months ended December, 1947 and 1948.

Detailed tables showing exports of wheat and flour over a period of years up to 1947-48 according to the countries of destination were included in the previous issue of the Wheat Summary (Vol. 7, No. 9).

TABLE 12 : EXPORTS OF WHEAT AND FLOUR

Year ended 30th June	N.S.W.	Vic.	Q'ld.	S.A.	W.A.	Tas.	Total
WHEAT							
(Thousand Bushels)							
1939	15,031	5,233	1,766	18,486	22,613	-	63,129
1945	194	38	-	16,030	16,129	-	32,391
1946	2,807	-	-	2,747	6,930	-	12,484
1947	3,306	685	-	3,973	4,132	-	12,176
1948	19,322	13,226	-	9,698	17,928	-	60,174
Six months ended -							
Dec., 1947	606	2,477	-	2,344	4,249	-	9,676
Dec., 1948	19,628	2,779	972	8,128	5,811	-	37,358
FLOUR							
(Tons of 2,000 lb.)							
1939	293,168	256,231	4	86,678	88,981	3	725,065
1945	172,588	143,658	1,714	134,893	101,896	-	559,749
1946	180,730	127,843	1,164	104,892	104,247	-	518,876
1947	271,154	221,476	454	142,423	129,591	-	765,098
1948	218,096	295,666	7	131,062	139,540	-	784,371
Six months ended -							
Dec., 1947	53,346	149,177	3	74,364	74,760	-	351,650
Dec., 1948	152,008	148,470	5,266	85,756	76,350	-	467,850

14. IMPORTS OF WHEAT AND FLOUR INTO THE UNITED KINGDOM

A section embracing details of the imports of wheat and flour into the United Kingdom according to country of origin for years up to 1947 was included in the previous issue of this Summary (Vol. 7, No. 9).

15. GENERAL REVIEW : (a) AUSTRALIA.

(i) Wheat Industry Stabilization Board. The Wheat Industry Stabilization Plan operated throughout Australia under war-time Commonwealth legislation during each of the seasons 1941-42 to 1948-49. The Plan provides for the registration of farms and licensing of areas by the Wheat Industry Stabilization Board. The area allotted to each grower was fixed in proportion to the average sown during the basic three year period, details of which are shown for each State in Table 4. Although licensing continued during the seasons 1945-46 to 1948-49, growers were permitted to plant without restriction. In Western Australia growers' acreages during the seasons 1942-43 to 1944-45 were restricted to a maximum of two-thirds of their basic acreages. During 1945-46, no such restriction was imposed but where growers voluntarily restricted the area sown to five-sixths or less of their basic acreage, compensation equal to one-sixth of their basic acreages was payable; subject to the qualification that half of the area licensed for wheat was cropped for grain.

The Wheat Industry Stabilization Board ceased to function in December, 1948, following the establishment of the post-war wheat stabilization plan under legislation passed by the Commonwealth and State Governments.

(ii) Post War Wheat Stabilization Plan. In a previous issue of this summary (Vol. 7, No. 8) a detailed account was given of developments since 1946 in connexion with attempts to establish a permanent wheat stabilization plan in Australia.

In July, 1948, the Commonwealth Minister for Commerce and Agriculture and State Ministers for Agriculture reached agreement on certain modifications to the Commonwealth Stabilization Plan. The principal amendment to the plan was that the control of production was not required and that State Governments would undertake the regulation of wheat growing on marginal areas. This modified plan was subsequently adopted by a majority of wheat growers in the four main wheat producing States in polls arranged by the respective State Governments, the results of the polls being as follows -

Results of Polls of Wheat Growers on the Question of Adoption of the Commonwealth Wheat Stabilization Plan as Modified in July, 1948

<u>State</u>	<u>For</u> No.	<u>Against</u> No.	<u>In Favour</u> %
New South Wales	8,951	6,360	58.5
Victoria	11,275	3,495	76.4
South Australia	5,729	4,090	58.3
Western Australia	3,957	2,426	61.9
<u>Total</u>	<u>29,912</u>	<u>16,371</u>	<u>64.6</u>

The requisite legislation was passed by Commonwealth and State Governments prior to the end of 1948 and the Wheat Stabilization Plan accordingly came into operation for the 1948-49 season and will continue for a period of five years up to the end of the 1952-53 season.

The principal provisions of the plan embodied in the Commonwealth Wheat Industry Stabilization Act, 1948 and Wheat Export Charge Act, 1948 (which also provide for the repeal of the earlier Commonwealth legislation passed in 1946) are as follows -

- (1) The Commonwealth Government shall guarantee a price (6/3d. per bushel f.o.r. ports, bulk basis for the 1947-48 season) for wheat grown and delivered by wheat-growers.
- (2) The guaranteed price, which is based on ascertained costs for the 1947-48 season, shall vary according to an index of production costs for each season starting with the 1948-49 crop. (Following a review of costs for the 1948-49 season by the Wheat Cost of Production Committee, the guaranteed price has been increased to 6s. 8d. per bushel f.o.r. ports, bulk basis.)
- (3) The guarantee shall apply to the wheat crops marketed through approved organizations for the period up to the end of the 1952-53 season.
- (4) Approved organizations shall be the Australian Wheat Board and those organizations which are empowered by State Governments with authority to receive wheat and to market it as the agents for the Australian Wheat Board.
- (5) The Commonwealth shall ensure the guaranteed price in respect of the export from any one season's crop, provided that this guarantee shall not apply to the quantity of export in excess of 100 million bushels.
- (6) A Stabilization Fund shall be established by means of a tax on wheat exported to meet the guaranteed price above mentioned.
- (7) The tax shall apply when the export price is higher than the guaranteed price, and shall be 50 per cent. of the difference between the two but shall not exceed 2s. 2d. a bushel.
- (8) The tax shall apply to the 1947-48 and later wheat crops.
- (9) The Commonwealth agrees that it will not hold an excessive amount in the Fund, and it will consider a refund of tax to the oldest contributing pool whenever the financial prospects of the Fund justify it. (Refunds of amounts contributed in respect of the 1945-46 and 1946-47 harvests have already been approved).

The respective State Wheat Industry Stabilization Acts, 1948 are complementary to the Commonwealth Act and came into operation on 25th November, 1948, the date on which the Commonwealth Act received Royal assent. The principal provisions of the State Acts are -

- (a) The Australian Wheat Board is afforded State statutory authority to act as provided in the Commonwealth Act in respect of -
 - (i) The purchase or other acquisition, the sale or other disposal and the control of all matters relating to the handling, storage, treatment, shipment, etc. of wheat or wheat products;
 - (ii) The licensing of any person, firm, company or State Authority to receive wheat on its behalf;
 - (iii) The fixation of the home consumption price for wheat at the same level as the price guaranteed by the Commonwealth and determined as provided in the Commonwealth Act.
 - (iv) Other matters specified.
- (b) In Queensland and Western Australia the respective State Wheat Boards are empowered to act as agents of the Australian Wheat Board, are entitled to be licensed to receive wheat on behalf of the Australian Wheat Board, and each is empowered to nominate one of its members as a growers' representative to the Australian Wheat Board.
- (c) In New South Wales, a State Wheat Committee is established to nominate one of its members as a growers' representative to the Australian Wheat Board and to advise the State Minister on wheat matters. It may act as agent of the Australian Wheat Board. The New South Wales Act also empowers the State Minister to exercise control over wheat growing in specified marginal areas of the State.

The Australian Wheat Board, as reconstituted under the Commonwealth Wheat Industry Stabilization Act, 1946 commenced to perform its functions under the Act on 16th December, 1948.

The provisions of the Commonwealth Wheat Stabilization Plan relating to the levy of a tax on wheat exported and the establishment of a Stabilization Fund, have been implemented by the Commonwealth Government under legislation passed in 1946 in respect of the 1945-46, 1946-47 and 1947-48 harvests. Contributions to the Stabilization Fund have amounted to about £7 million and £4 million from the 1945-46 and 1946-47 harvests respectively and are expected to reach approximately £15 million from the 1947-48 harvest. The Commonwealth Wheat Tax (Repeal and Refund) Act, 1948 which repealed the Wheat Tax Act, 1946, provides for the refund to growers, through the Australian Wheat Board of the amounts contributed to the fund from the 1945-46 and 1946-47 harvests, which are equivalent to approximately 1s. 1½d. per bushel and 10½d. per bushel, respectively. Refunds of contributions to the fund from the 1945-46 harvest were paid in December, 1948 and arrangements are complete to refund to growers, early in 1949, amounts contributed for the 1946-47 harvest.

GENERAL REVIEW - (b) ABROAD

(i) General. The present world import requirements of wheat are not known but the extent to which these can be met (apart from transport difficulties) depends mainly upon the surpluses available for export in the four chief exporting countries, viz., Australia, Argentine, Canada and the United States of America. Details of the production, domestic utilization and exportable surpluses of these countries, compiled from statistics published by the Food Research Institute, and Food and Agriculture Organization of the United Nations and from other official sources, are given in the following table for each year since 1938-39.

TABLE 13 : WHEAT SUPPLIES AND DISPOSITION IN FOUR CHIEF EXPORTING COUNTRIES
(Million bushels.)

Year	Supplies			Domestic use (incl. Food, Seed, Feed, etc.)	Surplus over Domestic Utilization	Net Exports	Year end Stocks
	Initial Stocks	Crop	Total				
<u>UNITED STATES OF AMERICA (JULY TO JUNE)</u>							
1938-39	153	920	1,073	714	359	109	250
1939-40	250	741	991	663	328	43	200
1940-41	200	313	1,093	674	419	34	305
1941-42	305	943	1,328	668	660	26	632
1942-43	632	974	1,606	951	655	33	622
1943-44	622	841	1,463	1,217	246	ø (71)	317
1944-45	317	1,072	1,389	1,011	378	97	281
1945-46	281	1,109	1,390	898	492	391	101
1946-47	101	1,153	1,254	702	472	368	84
1947-48	84	1,365	1,449	773	676	401	195
1948-49	195	(a) 1,288	(a) 1,483	(b) 750	(b) 733	(d)	(d)
<u>CANADA (AUGUST TO JULY)</u>							
1938-39	25	360	385	124	261	158	103
1939-40	103	521	624	132	492	192	300
1940-41	300	540	840	129	711	231	430
1941-42	400	315	795	149	646	222	424
1942-43	424	556	930	171	309	215	594
1943-44	594	205	879	100	699	343	356
1944-45	356	417	773	169	604	346	258
1945-46	258	319	577	163	414	340	74
1946-47	74	413	437	161	326	239	87
1947-48	87	341	428	(a) 154	(a) 274	(a) 198	(a) 76
1948-49	(a) 76	393	(a) 469	(b) 150	(b) 319	(d)	(d)

TABLE 13 : WHEAT SUPPLIES AND DISPOSITION IN FOUR CHIEF EXPORTING COUNTRIES

(CONTINUED)
(Million Bushels.)

Year	Supplies			Domestic use (Incl. Food, Seed, Feed, etc.)	Surplus over Domestic Utilization	Net Exports	Year end Stocks
	Initial Stocks	Crop	Total				
ARGENTINE (AUGUST TO JULY)							
1938-39	72	379	451	99	352	122	230
1939-40	230	131	361	107	254	179	75
1940-41	75	299	374	98	276	96	100
1941-42	130	224	404	101	303	83	220
1942-43	220	235	455	116	339	69	270
1943-44	270	250	520	176	344	100	244
1944-45	244	150	394	167	227	104	123
1945-46 (c)	50	144	194	125	69	53	16
1946-47 (c)	16	206	222	128	94	32	12
1947-48 (c)	12	(a) 245	(a) 257	(b) 143	(b) 114	(b) 101	(b) 13
1948-49 (c)	(b) 13	(c) 130	(b) 193	(d)	(d)	(d)	(d)
AUSTRALIA (DECEMBER TO NOVEMBER)							
1938-39	14	155	169	57	112	91	21
1939-40	21	210	231	59	172	95	77
1940-41	77	82	159	59	100	53	42
1941-42	42	167	209	60	149	44	105
1942-43	105	156	261	69	192	38	154
1943-44	154	110	264	95	169	91	75
1944-45	75	53	131	100	31	19	12
1945-46	12	142	154	78	76	56	20
1946-47	20	117	137	78	59	46	13
1947-48 (c)	13	220	233	75	158	132	26
1948-49	(a) 26	(b) 190	(b) 216	(b) 77	(b) 139	(b) 121	(b) 10

¹ Net Imports.

- (a) Subject to revision. (b) Estimate. (c) December to November.
(d) Not yet available. (e) Unofficial estimate.

(ii) International Wheat Agreement. In a previous issue of this Summary (Vol. 7 No. 8), details were given of the International Wheat Agreement drawn up by thirty-six wheat importing countries and the exporting countries of the United States of America, Canada and Australia at the Special Session of the International Wheat Conference in Washington D.C. on the 6th March, 1946.

The Agreement was, however, subject to ratification by the Governments concerned and as a result of the failure of the Government of the United States of America to ratify the Agreement prior to 31st July, 1946 and the subsequent withdrawal of the United Kingdom, it was allowed to lapse.

Further attempts to draw up an international wheat agreement are being made at the International Wheat Conference at present in session in Washington D.C., U.S.A. On this occasion, Russia (U.S.S.R.) and Argentine are represented in discussions at the Conference.

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