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MONTHLY SUMMARY

OF

THE WHEAT SITUATION IN AUSTRALIA

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No. 9.

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Prepared under instructions from the Honorable the Treasurer

by

S. R. CARVER

Acting Commonwealth Statistician.

7th April, 1941.

1. AREA, PRODUCTION AND AVERAGE YIELD.

Estimates made by official authorities in the various States indicate that the production of wheat in Australia for the season 1940-41 is approximately 83.8 million bushels.

The crop of 83.8 million bushels in 1940-41 is approximately 60 per cent. less than the harvest of 210.3 million bushels in 1939-40 and compares unfavourably with an average harvest of 177.7 million bushels in the ten years ended 1939-40.

On the basis of farmers' intentions as indicated prior to harvesting, it was estimated that approximately 12,338,000 acres were sown for grain in 1940-41. On account of the extreme dry conditions, however, a substantial acreage did not produce a grain crop; having failed entirely or was cut for hay or profitably fed-off. For this reason, the area actually harvested will be below that quoted viz. 12.3 million acres.

On the basis of area sown for grain as at present estimated, the average yield in 1940-41 was 6.80 bushels per acre, compared with the high average yield of 15.8 bushels per acre in 1939-40 and with 12.5 bushels per acre over the ten years ended 1939-40.

Details for the five previous seasons, together with those for the ten years ended 1940 and for the season 1940-41, are given for each State and for Australia in the tables below:-

ESTIMATES OF AREA OF WHEAT SOWN FOR GRAIN AND OF PRODUCTION, 1940-41.

State	ESTIMATED AREA		ESTIMATED PRODUCTION		
	Authority	Area acres	Authority	Date	Production bushels
N.S.W. ..	Govt. Statistician ..	4,289,000	Govt. Statistician ..	18. 3.41	24,441,000
Vic. ..	Director of Agriculture ..	2,584,000	Director of Agriculture ..	23. 1.41	14,000,000
Qld. ..	State Wheat Board ..	302,000	State Wheat Board ..	25. 1.41	5,600,000
S. A. ..	Govt. Statist ..	2,600,000	Govt. Statist ..	16.12.40	18,000,000
W. A. ..	Govt. Statistician ..	2,552,000	Govt. Statistician ..	11. 2.41	21,600,000
Tas. ..	Govt. Statistician ..	9,200	Govt. Statistician ..	20. 2.41	187,000
A.C.T. ..	Com. Statistician ..	2,000	Com. Statistician ..	29. 1.41	20,000
AUSTRALIA	TOTAL	12,338,200	TOTAL	-	83,848,000

AREA SOWN UNDER WHEAT FOR GRAIN - AUSTRALIA.

(in 1,000 acres)

Year	N.S.W.	Vic.	Qld.	S.A.	W.A.	Tas.	A.C.T.	AUSTRALIA
1935-36	3,851	2,324	240	2,989	2,541	10	2	11,957
1936-37	3,983	2,394	284	3,058	2,575	21	1	12,316
1937-38	4,465	2,686	373	3,162	3,026	21	2	13,735
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
Average Ten Years ended 1940	4,344	2,989	292	3,436	3,096	16	2	14,175
Estimate of 1940-41(a)	4,289	2,584	302	2,600	2,552	9	2	12,338

PRODUCTION OF WHEAT - AUSTRALIA.

(in 1,000 bushels)

Year	N.S.W.	Vic.	Qld.	S.A.	W.A.	Tas.	A.C.T.	AUSTRALIA
1935-36	48,822	37,552	2,690	31,616	23,315	186	36	144,217
1936-37	55,668	42,845	2,016	28,715	21,549	571	26	151,390
1937-38	55,104	48,173	3,749	43,429	36,225	526	50	187,256
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	40,661	114	45	210,283
Average Ten Years ended 1940	60,149	40,381	4,353	36,464	35,990	344	45	177,726
Estimate of 1940-41(a)	24,441	14,000	5,600	18,000	21,600	187	20	83,848

AVERAGE YIELD PER ACRE - AUSTRALIA.

Year	N.S.W.	Vic.	Qld.	S.A.	W.A.	Tas.	A.C.T.	AUSTRALIA
	bush.	bush.	bush.	bush.	bush.	bush.	bush.	bush.
1935-36	12.68	16.16	11.23	10.56	9.18	17.88	22.37	12.06
1936-37	13.98	17.90	7.11	9.39	8.37	26.78	17.98	12.29
1937-38	12.34	17.93	10.05	13.74	11.97	24.95	24.24	13.63
1938-39	12.86	6.59	19.42	10.28	10.79	20.84	28.74	10.83
1939-40	17.46	15.93	18.27	15.02	13.76	15.20	18.54	15.83
Average Ten Years ended 1940	13.85	13.51	14.89	10.61	11.63	21.06	21.15	12.54
Indicated 1940-41(a)	5.70	5.42	18.54	6.92	8.46	20.36	10.00	6.80

(a) See Section 1 above.

2. WEATHER CONDITIONS.

(Compiled from reports of the Commonwealth Meteorologist and current press reports)

Seasonal conditions in February were regarded as very satisfactory in all States except Western Australia. In the agricultural areas of this State the position is regarded as critical.

3. WHEAT PRICES.

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 represent approximate export prices comparable with prices quoted for previous months.

WHEAT PRICES - AUSTRALIA.

(Source: New South Wales Government Statistician, other States daily press)

Weighted average of shippers' limits for growers' bagged and bulk lots, Sydney, Melbourne and Adelaide)

(pence per bushel)

Month	1935	1936	1937	1938	1939	1940	1941
January ..	32.80	44.54	61.44	51.86	29.00	(a)46.50	(a)47.75
February ..	34.12	42.29	60.28	51.51	29.05	(a)46.50	(a)47.75
March ..	36.04	43.22	64.07	47.96	27.19	(a)47.00	
April ..	39.36	44.11	64.55	46.17	28.12	(a)48.00	
May ..	38.75	43.90	62.66	44.69	30.28	(a)48.00	
June ..	36.59	42.19	60.40	41.85	28.68	(a)48.00	
July ..	34.42	46.63	65.21	42.02	26.15	(a)46.00	
August ..	36.81	55.22	61.14	36.92	24.98	(a)47.25	
September ..	40.30	55.64	60.47	32.72	29.93	(a)47.25	
October ..	43.51	58.44	61.06	33.58	32.00	(a)47.75	
November ..	40.11	56.87	53.98	30.34	(a)32.00	(a)47.75	
December ..	41.33	62.98	51.65	28.96	(a)35.00	(a)47.75	
Average:	37.84	49.67	60.61	40.72	29.37	47.50	

(a) See text above for qualifications. The figures shown in brackets are nominal.

4. 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.

5. EXPORTS OF WHEAT AND FLOUR.

The tables showing quantities of wheat and flour currently exported from Australia are not available for publication.

6. IMPORTS OF WHEAT AND FLOUR INTO THE UNITED KINGDOM.

Data not available.

7. PRODUCTION OF FLOUR.

Detailed particulars of the production of flour in Australian mills during 1938-39 were included in Issue No. 1 of Volume 5 of this Summary. Similar details for 1939-40 will be available about May next.

8. STOCKS OF WHEAT AND EXPORTABLE SURPLUS.

Tables showing the exportable surplus of wheat and flour in Australia and the stocks of wheat at country silos are not available for publication.

The Australian Wheat Board has stated that the quantity of wheat for disposal during 1941 is about 88½ million bushels. Sales to the 15th March, 1941, amounted to 20.8 million bushels distributed as follows:- Local flour trade 6.2 million bushels; Export flour trade 5.6 million bushels; Produce trade 3.3 million bushels; Exports as

wheat 5.7 million bushels. This leaves 67.7 million bushels still to sell, of which, local trade and the export flour trade will absorb about 49.4 million bushels leaving an amount of 18.3 million bushels available for export as wheat.

9(a). GENERAL REVIEW - AUSTRALIA.

The Australian Wheat Board has announced that up to the 15th March, 1941, 62,685,000 bushels of wheat from the 1940-41 harvest had been delivered to the Board. The distribution of this quantity is shown, by States, in the following table together with those made for the 1939-40 harvest.

AUSTRALIAN WHEAT BOARD - RECEIPTS OF WHEAT.

State	1939-40 Harvest	1940-41 Harvest(a)
	'000 bus.	'000 bus.
New South Wales	66,729	16,598
Victoria ..	47,206	9,777
Queensland ..	6,255	5,242
South Australia	38,151	13,593
Western Australia	37,393	17,420
Tasmania ..	41	55
Total:	195,775	62,685

(a) Up to 15th March, 1941.

The Chairman of the Wheat Industry Stabilization Board announced that any delay in the issue of certificates of registration and licences was due to the further investigation needed to check the exaggerated acreages applied for by many growers. The Chairman again emphasised the point that sowings for the 1941-42 crop might proceed on normal acreages but those who sowed in excess of normal would do so at their own risk.

9(b). GENERAL REVIEW - ABROAD.

It has been reported that deliveries of wheat in Canada for the coming season will be limited to 230 million bushels. A reduction of output to this level must necessarily cause a substantial contraction of area.

During the ten seasons ended 1940, the average area sown to wheat for grain in Canada amounted to 26,019,000 acres, while the average production amounted to 340 million bushels or 13.08 bushels per acre. It is estimated that on this average yield the allotted total of 230 million bushels would be produced from 17,600,000 acres. In 1940 the area sown was 28,700,000 acres.

A proposal to grow maize, barley and flax on wheat lands is under consideration but no report of a final decision has yet been received.

It is reported that the Secretary of Agriculture in Washington favours a reduction in the acreage under wheat by 10 per cent. in the United States of America. If this proposed reduction becomes effective, action to reduce the area under wheat will be proceeding in the four major exporting countries of the world - Canada, United States of America, Argentina and Australia.

The production of wheat in the Argentine for the season 1940-41 is expected to be about 270 million bushels compared with a forecast of 294 million bushels made in December last. This decrease in output is attributed to the torrential rains which fell towards the end of December causing considerable damage to wheat and other crops.

In 1939-40, the production amounted to only 119.5 million bushels which was only one-third of that obtained in 1938-39. The average production for the five years ended 1937-38 was 220 million bushels.

The second official estimate of the All-India wheat acreage indicates an area of 33,370,000 acres. This is 0.6 million acres or 2 per cent. below that of 1940 and 1.9 million acres or 5 per cent less than that of 1939.

According to the Crop Reporting Board of the United States Department of Agriculture it is stated that, based upon farmers intentions to plant spring wheats,

17,100,000 acres are indicated for 1941. This may be compared with 19,400,000 acres, the area indicated for 1940 of which only, 17,360,000 acres were harvested as shown in the following table.

AREA SOWN TO SPRING WHEAT - UNITED STATES OF AMERICA.
('000 acres)

Particulars	1937	1938	1939	1940	1941
Area sown	23,416	23,515	17,500	(a) 19,400	(a) 17,100
Area harvested	17,444	20,510	15,400	17,360	(b)

(a) Area indicated. (b) Not yet available.

The Dominion Statistician reported that the quantity of Canadian wheat in Canada for the week ended 14th February, 1941 was 492.1 million bushels compared with 330.0 million bushels held on 16th February, 1940. It was announced at Ottawa that endeavour is being made to ensure that the visible supply of Canadian wheat at July, 1942 shall not be greater than that existing at July, 1941. It was considered that this quantity was the limit of the wheat reserve which should be carried.

A forecast made by the Dominion Statistician estimates probable carryover of Canadian wheat on 31st July next at 576 million bushels.

S. R. CARVER
Acting Commonwealth Statistician.

Commonwealth Bureau of Census and Statistics,

Canberra, A.C.T. 7th April, 1941.