

COMMONWEALTH BUREAU OF CENSUS AND STATISTICS

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MONTHLY SUMMARY

OF

THE WHEAT SITUATION IN AUSTRALIA

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No. 4.

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Prepared under instructions from the Honorable the Treasurer

by

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1. AREA, PRODUCTION AND AVERAGE YIELD.

Estimates of the area sown to wheat for grain and a forecast of production for Australia for the season 1941-42 are available for all States. These are shown in the table below.

The estimated area sown for grain in 1941 was 12,656,000 acres indicating an increase of 200,000 acres or 1.6 per cent. on that sown in 1940-41 but it is 943,000 acres or 7.0 per cent. below the average for the ten previous years.

The production forecast of 166,100,000 bushels equals the average production for the decennium ended with that year.

ESTIMATES OF AREA AND FORECASTS OF PRODUCTION, 1941-42.

State	ESTIMATES OF AREA			FORECASTS OF PRODUCTION		
	Authority	Date	Area acres	Authority	Date	Production bushels
N.S.W.	Director of Marketing ..	20th Oct.	4,228,000	Director of Marketing ..	20th Oct.	43,000,000
Vic.	Stabilization Committee ..	29th Oct.	2,878,000	Director of Agriculture ..	31st Oct.	43,000,000
Q'land	State Wheat Board ..	22nd Oct.	350,000	State Wheat Board ..	22nd Oct.	3,250,000
S.A.	Govt. Statist ..	20th Oct.	2,500,000	Govt. Statist ..	20th Oct.	40,000,000
W.A.	Govt. Statistician ..	4th Nov.	2,687,000	Govt. Statistician ..	4th Nov.	36,600,000
Tas.	Com. Statistician ..	4th Nov.	9,000	Com. Statistician ..	4th Nov.	200,000
A.C.T.	Com. Statistician ..	4th Nov.	2,000	Com. Statistician ..	4th Nov.	50,000
Australia:	-	-	12,654,000	-	-	166,100,000

Details of the area, production and average yield per acre for each of the five seasons ended 1940-41 and the average for the ten years ended 1941 and those for 1941-42 are given in the tables below:-

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
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	2,746	442	3,080	3,413	10	2	14,346
1939-40 ..	4,381	2,627	361	2,735	2,970	7.5	2	13,284
1940-41(a) ..	4,289	2,673	302	2,559	2,620	9.2	2	12,454
Average Ten Years ended 1941	4,259	2,796	295	3,273	2,957	15	2	13,597
Estimate for 1941-42(b)	4,228	2,878	350	2,500	2,687	9	2	12,654

PRODUCTION OF WHEAT : AUSTRALIA (in 1,000 bushels)

Year	N.S.W.	Vic.	Qld.	S.A.	W.A.	Tas.	A.C.T.	AUSTRALIA
1936-37 ..	55,668	43,845	2,016	28,715	21,549	571	26	151,390
1937-38 ..	55,104	43,173	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	45,064	6,585	41,072	40,861	108	45	210,277
1940-41(a) ..	24,441	13,521	5,600	17,822	21,048	187	35	82,654
Average Ten Years ended 1941	56,006	36,351	4,423	34,768	32,800	327	45	164,720
Estimate for 1941-42(b)	43,000	43,000	3,250	40,000	36,600	200	50	166,100

AVERAGE YIELD PER ACRE : AUSTRALIA

	bush.	bush.	bush.	bush.	bush.	bush.	bush.	bush.
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 ..	12.88	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(a) ..	5.70	5.06	18.54	6.96	8.03	20.36	17.09	6.64
Average Ten Years ended 1941	13.15	13.00	14.97	10.62	11.09	21.38	20.82	12.11
Indicated 1941-42(b)	10.17	14.94	9.29	16.00	13.62	22.22	25.00	13.13

(a) Subject to revision. 2. (b) See Table above.

2. WEATHER CONDITIONS.

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

Seasonal prospects are regarded as very favourable in all States except New South Wales and Queensland where the condition of crops is regarded as below average.

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 are approximate but may be compared with prices quoted for previous months.

WHEAT PRICES : AUSTRALIA

(Source: New South Wales Government Statistician, other States daily press)
(Weighted average 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	61.84	51.86	29.00	(a) 46.50	(a) (47.75)
February ..	34.12	42.29	60.28	61.51	29.05	(a) 46.50	(a) (50.00)
March ..	36.04	43.22	64.07	47.96	27.19	(a) 47.00	(a) (50.00)
April ..	39.36	44.11	64.55	46.17	28.12	(a) (48.00)	(a) (50.00)
May ..	38.75	43.90	62.66	44.69	30.28	(a) (48.00)	(a) (50.00)
June ..	36.59	42.19	60.40	41.85	28.68	(a) (48.00)	(a) (50.00)
July ..	34.42	46.63	65.21	42.02	26.15	(a) (48.00)	(a) (50.00)
August ..	36.81	55.22	61.14	36.92	24.98	(a) (47.25)	(a) (50.00)
September ..	40.30	55.64	60.47	32.72	29.93	(a) (47.25)	(a) (50.00)
October ..	43.51	58.44	61.06	33.58	32.00	(a) 47.75	(a) (50.00)
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:	37.64	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.

The production of flour by flour mills in Australia during the year ended June, 1940 amounted to 1,372,382 tons of 2,000 lb., valued at £10,726,489. The quantity of flour, which almost equals the record output of the previous year, was milled from 66,000,000 bushels of wheat. Tables showing details of operations of flour mills during 1939-40 were given in issue No.12 of Volume 5 of this Summary. Similar details for 1940-41 are not available.

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 sidings are not available for publication.

9(a). GENERAL REVIEW : AUSTRALIA.

Details of advances paid in respect of the balance of wheat acquired from the 1938-39 harvest (No.1 Pool) and those paid on the harvests of 1939-40 (No.2 Pool) and 1940-41 (No.4 Pool) are given in the table below.

A relatively small quantity of wheat of inferior quality harvested during 1939-40 was subsequently excluded from the No.2 Pool and placed in No.3 Pool created for that purpose. All wheat transferred to No.3 Pool was paid 3d. per bushel less than that paid under No.2 Pool.

WHEAT POOL ADVANCES : AUSTRALIA.

Advance	Balance 1938-39 Harvest (No.1 Pool)		1939-40 Harvest (No.2 Pool)		1940-41 Harvest (No.4 Pool)	
	Bulk	Bagged	Bulk	Bagged	Bulk	Bagged
	s. d. per bush.	s. d. per bush.	s. d. per bush.	s. d. per bush.	s. d. per bush.	s. d. per bush.
First (a) ..	2. 0	2. 0	2. 8½	2.10½	2.10½	3. 0
Second ..	0. 6	0. 8	0. 4	0. 4	0. 4	0. 4
Third ..	0.1.75	0.1.75	0. 3	0. 3	-	-
Final ..	0.0.16	0.0.16	0. 1½	0. 1½	-	-
TOTAL:	2.7.91	2.9.91	3. 4½	3. 6½	(b)3. 2½	(b)3. 4
Quantity Acquired:	17,840,000 bush.		195,716,000 bush.		64,000,000 bush.	

(a) From which rail freight was deducted. (b) Total advance to date.

9(b). GENERAL REVIEW : ABROAD.

The Crop Reporting Board of the United States Department of Agriculture expects the total production of wheat for 1941 to be 961 million bushels upon conditions existing on 1st October. This may be compared with the production of previous years in the following table.

PRODUCTION OF WHEAT : UNITED STATES (in million bushels)

Wheat	Average 1929-38	1939	1940	Forecast 1941
Winter ..	571	570	589	685
Durum ..	30	34	35	44
Other Spring	154	147	193	232
TOTAL:	755	751	817	961

The harvest forecasted for 1941 is the greatest produced in the United States, with the exception of that obtained in 1915 which amounted to more than 1,000 million bushels.

In Canada the harvest now being reaped is estimated at 306,459,000 bushels. The second estimate of production will be released on 12th November. Details of the area and production of this and previous years are given in the following table:-

PRODUCTION OF WHEAT : CANADA.

Year	Area	Production	Average Yield per acre	Year	Area	Production	Average Yield per acre
	'000 acres	'000 bus.	bus.		'000 acres	'000 bus.	bus.
1932	27,182	443,061	16.3	1937	25,570	180,210	7.0
1933	25,991	281,892	10.8	1938	25,931	360,010	13.9
1934	23,985	275,849	11.5	1939	26,757	489,623	18.3
1935	24,116	281,935	11.7	1940	28,700	551,390	19.0
1936	25,605	219,216	8.6	1941 [†]	21,700	306,459	14.1

† Forecast.

The area sown to wheat in the Argentine for 1941-42 has been officially stated at 17,569,000 acres. This acreage shows little change from that sown in 1940-41 (17.6 million) and 1939-40 (17.8 million). In 1938-39 and the two preceding years, however, the area averaged slightly more than 20 million acres. No official estimate has yet been made of the probable production. Weather conditions have been very favourable and it has been forecast unofficially that a harvest of 270 million bushels is possible.

The following table summarises the production of wheat, according to the latest available figures, in the four major exporting countries for the 1941 season just ended in the Northern Hemisphere and for the 1941-42 season about to commence in the Southern Hemisphere. An estimate of the probable exportable surplus from these harvests is also shown.

PRODUCTION OF WHEAT : FOUR MAJOR EXPORTING COUNTRIES
(million bushels)

Particulars	Estimates		Forecasts		Total
	U.S.A. 1941	Canada 1941	Australia 1941-42	Argentine Republic 1941-42	
Production ..	961	306	166	270	1,703
Less Domestic Requirements ..	700	130	55	100	985
Balance = Estimated exportable surplus for Season 1941-42 ..	261	176	111	170	718

A surplus in the vicinity of 700 million bushels is more than sufficient to meet the world import demand which, for the year immediately preceding the war, totalled about 600 million bushels. Of this quantity, 450 million bushels was absorbed by Europe and the balance of 150 million bushels by countries outside Europe. It is apparent that world trade in wheat must be limited by the exigencies of war and blockade, and as a consequence, surplus stocks in exporting countries will increase.

In addition to the surplus from the 1941-42 season referred to above, there already exists in the principal exporting countries large surpluses available from previous harvests. On 1st August last, these totalled more than 1,000 million bushels compared with 770 million bushels on the corresponding date in 1940 and 190 million bushels held in 1937.

The problems arising from this accumulation of surpluses and other difficulties of the world wheat industry are being examined by the International Wheat Conference at Washington, U.S.A.

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