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A.C.T.

AUSTRALIA : SUMMARY OF THE WHEAT SITUATION

MAY, 1948

Volume 7.

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Prepared under instructions from the Right Honorable the Treasurer

by

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ACTING COMMONWEALTH STATISTICIAN

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NOTE: The last issue of this Summary (Volume 7, No. 7) was released on 4th February, 1948. This is the eighth of the series to be included under Volumes 7 and subsequent numbers will appear from time to time as circumstances require.

1. WHEAT FOR GRAIN : ESTIMATE OF AREA, PRODUCTION AND AVERAGE YIELD, 1947-48

It is estimated that Australia's wheat crop for the 1947-48 season reached the record total of 228 million bushels. The area sown is estimated at 13.98 million acres and the average yield per acre at 16.34 bushels. Compared with the average for the five pre-war years ended 1938-39 these represent increases of 1 million acres or 7.7 per cent. in area sown, 74 million bushels or 48.0 per cent. in total production and 4.45 bushels per acre in average yield.

Despite losses due to unseasonable weather at the time of harvest, the 1947-48 crop exceeded the previous record crop in 1932-33 by 1.5 million bushels or 6.8 per cent. The harvests in New South Wales and Queensland constituted records and exceeded the average production during the five years ended 1938-39 by 83.3 per cent. and 146.3 per cent. respectively, while production in Victoria, South Australia and Western Australia was above the pre-war average.

Details of the estimates of area sown to wheat for grain, production and average yield for each State and for Australia for the year 1947-48 are shown in the table following together with the sources of these estimates.

TABLE 1 : WHEAT FOR GRAIN : ESTIMATED AREA AND PRODUCTION, 1947-48

State	Estimated Area Sown		Estimated Production			
	Authority	Area '000 acres	Authority	Date	Production '000 bush.	Average Yield per acre bush.
N.S.W.	Government Statistician	5,100	Government Statistician	23.4.48	101,000	19.80
Vic.	Wheat Stabilization Board	3,241	Government Statist	28.4.48	48,000	14.81
Q'ld.	Government Statistician	479	Government Statistician	4.5.48	10,400	21.71
S.A.	Government Statist	2,350	Government Statist	28.4.48	50,250	14.57
W.A.	Government Statistician	2,800	Government Statistician	30.4.48	34,500	12.32
Tas.	Commonwealth Statistician	6	C'wth Statistician	26.4.48	140	23.33
A.C.T.	"	5	"	4.5.48	100	20.00
Total:		13,981			228,390	16.34

2. WHEAT FOR GRAIN : AREA, PRODUCTION AND AVERAGE YIELD, 1938-39 TO 1947-48

Details of the area, production and average yield per acre for each of the ten seasons ended 1947-48, are given in Table 2 following, in comparison with the average for the five seasons ended 1938-39.

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	4,168	2,522	312	3,096	2,804	16	2	12,980
1938-39	4,651	2,748	442	3,000	3,413	10	2	14,346
1939-40	4,381	2,827	362	2,735	2,770	8	2	13,285
1940-41	4,454	2,673	322	2,560	2,626	7	2	12,645
1941-42	3,969	2,757	290	2,326	2,653	7	1	12,003
1942-43	3,033	2,145	335	2,009	1,753(a)	4	1	9,280
1943-44	2,693	1,793	281	1,534	1,567(a)	5	2	7,875
1944-45	2,845	2,142	332	1,623	1,526(a)	4	1	8,453
1945-46	3,774	3,251	392	2,165	1,836(b)	5	2	11,425
1946-47	4,475	3,501	248	2,519	2,426	8	3	13,180
1947-48(c)	5,100	3,241	479	2,350	2,800	6	5	13,981

- (a) Compulsorily restricted by one-third.  
 (b) Voluntary restriction up to one-sixth of basic acreage.  
 (c) Estimated.

TABLE 2 : WHEAT FOR GRAIN : AREA, PRODUCTION AND AVERAGE YIELD (CONTD.)

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	28,984	359	42	154,325
1938-39	59,898	18,104	8,584	31,674	36,844	205	59	155,368
1939-40	76,552	45,054	6,795	41,072	40,861	108	45	210,487
1940-41	23,933	13,522	5,687	17,856	21,060	140	35	82,233
1941-42	48,500	46,954	3,080	30,511	37,500	145	23	166,713
1942-43	51,693	41,803	5,005	36,525	20,600	73	28	155,727
1943-44	47,500	19,734	5,084	20,691	16,550	122	39	109,720
1944-45	17,134	3,498	6,981	9,244	15,929	92	2	52,880
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(a)	101,000	48,000	10,400	34,250	34,500	140	100	228,390

(a) Estimated.

C. AVERAGE YIELD PER ACRE.

Year	bus.	bus.	bus.	bus.	bus.	bus.	bus.	bus.
Average five years ended 1938-39	12.87	13.68	13.54	10.52	10.12	22.64	23.44	11.89
1938-39	12.88	6.59	19.42	10.28	10.79	20.84	28.74	10.83
1939-40	17.48	15.93	18.77	15.02	13.76	14.37	18.54	15.84
1940-41	5.37	5.06	17.66	6.97	8.02	17.46	17.09	6.50
1941-42	12.22	17.03	10.59	13.12	14.13	17.92	17.64	13.89
1942-43	17.04	19.49	14.95	16.18	11.75	17.76	24.88	16.78
1943-44	17.64	11.00	18.07	13.49	10.56	25.24	27.75	13.93
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 (a)	19.80	14.81	21.71	14.57	12.32	23.33	20.00	16.34

(a) Estimated.

3. FARMERS' INTENTIONS TO SOW WHEAT AND ACTUAL SOWINGS.

At the annual census of rural production collected during April and May, farmers throughout Australia are asked to indicate their intentions to sow wheat for all purposes (grain, hay and green feed) 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.

Particulars	('000 acres)							
	N.S.W.	VIC.	Q'LD.	S.A.	W.A.	TAS.	A.C.T.	AUST.
SEASON 1945-46								
Area Sown -								
For Grain ..	3,774	3,251	392	2,165	1,836	5	2	11,425
" Hay ..	390	114	13	224	104	5	1	851
" Greenfeed ..	50	-	84	18	22	1	-	175
All Purposes:	4,214	3,365	489	2,407	1,962	11	3	12,451
Area intended to be sown (All Purposes)	4,177	3,235	441	2,348	2,152	8	3	12,364
SEASON 1946-47								
Area Sown -								
For Grain ..	4,475	3,501	248	2,519	2,426	8	3	13,180
" Hay ..	264	65	10	134	108	4	1	586
" 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 (a) -								
For Grain ..	5,100	3,241	479	2,350	2,800	6	5	13,981
" Hay ..	265	114	(b)	110	(b)	(b)	1	(b)
" Greenfeed ..	60	-	(b)	10	(b)	(b)	-	(b)
All Purposes:	5,425	3,355	(b)	2,470	(b)	(b)	6	(b)
Area intended to be sown (All Purposes)	5,225	3,146	502	2,600	2,844	9	4	14,330

(a) Estimated. (b) Not yet available.

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 given for each State and the Australian Capital Territory, according to records of the Wheat Industry Stabilization Board. Details of the area sown as well as the percentage that these areas bear to the area licensed are also given.

TABLE 4 : WHEAT FOR GRAIN : LICENSED AND SOWN ACREAGES.  
(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 ..	5,014	3,333	481	3,058	3,243	12	1	15,142
1945-46								
Area licensed (a)	4,880	3,570	521	2,829	2,559(b)	3	2	14,367
" sown ..	3,774	3,251	392	2,165	1,836(b)	5	2	11,425
Area sown as a percentage of area licensed	77%	91%	75%	77%	72%	167%	100%	80%
No. of Licenses issued ..	No. 23,340	No. 18,099	No. 3,436	No. 15,507	No. 8,475	No. 132	No. 30	No. 69,019
1946-47								
Area licensed (a)	5,540	4,087	618	3,240	3,364	4	3	16,856
" 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 Licenses issued ..	No. 24,983	No. 21,190	No. 4,400	No. 17,690	No. 10,093	No. 189	No. 26	No. 78,571
1947-48								
Area Licensed (a)	6,100	3,723	671	3,050	3,477	6	5	17,032
" Sown (c) ..	5,100	3,241	479	2,350	2,800	6	5	13,981
Area Sown as a percentage of area licensed	84%	87%	71%	77%	81%	100%	100%	82%
No. of licenses issued ..	No. 26,494	No. 20,354	No. 4,785	No. 17,732	No. 9,679	No. 213	No. 32	No. 79,289

- (a) Includes areas temporarily licensed on wheat farms and areas of temporary wheat farms.
- (b) Restriction not compulsory but compensation paid where area was voluntarily restricted.
- (c) Subject to revision.

5. VARIETIES OF WHEAT SOWN : 1946 - 47.

Details of the principal varieties of wheat sown in 1946-47 in the four main wheat producing Australian States and the percentage which each bears to the total area sown are given in the following table.

TABLE 5 : WHEAT : PRINCIPAL VARIETIES SOWN, 1946-47

New South Wales		Victoria		South Australia		Western Australia	
Variety	%	Variety	%	Variety	%	Variety	%
Bencubbin	45.7	Quadrat	26.9	Bencubbin	23.4	Bencubbin	33.5
Ford	10.8	Ghurka	20.3	Ranee	9.6	Bungulla	21.9
Dundee	4.7	Pinder	9.6	Waratah	5.8	Glueclub	18.1
Eureka	4.1	Magnet	9.1	Sword	5.8	Ranee	4.3
Bordan	3.4	Ranee	8.8	Dundee	5.4	Merredin	3.8
Ranee	3.2	Bencubbin	8.4	Gluyas	4.8	Waratah	2.0
Waratah	2.7	Regalia	4.8	Bobin	3.8	Nabawa	1.5
Gulch	2.7	Dundee	2.1	Marathon	3.6	Ford	1.2
Eureka 2	2.1	Bobin	1.4	Nabawa	3.1	Dundee	1.2
All Other	20.6	All Other	8.4	All Other	34.7	All Other	12.5
<b>TOTAL</b>	<b>100.0</b>	<b>TOTAL</b>	<b>100.0</b>	<b>TOTAL</b>	<b>100.0</b>	<b>TOTAL</b>	<b>100.0</b>

6. WHEAT FARMS

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

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

State	1938-39	1940-41	1946-47
	No.	No.	No.
New South Wales	16,550	15,831	15,971
Victoria	12,305	11,972	13,155
Queensland	3,190	2,169	2,006
South Australia	11,842	10,986	10,412
Western Australia	8,909	8,074	7,460
Tasmania	146	140	122
<b>TOTAL (a)</b>	<b>53,022</b>	<b>49,172</b>	<b>49,126</b>

(a) Excludes Northern Territory and Australian Capital Territory.

7. WHEAT PRICES : AUSTRALIA

(i) Price of Wheat for Home Consumption - Australia. From June, 1942, the monthly price of wheat sold for gristing 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 flour also rose to 6s. 3d. per bushel (bulk basis) on 19th January, 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.

(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.b. ports". From November, 1939, the price is approximate because the market is "broad" as wheat is sold at times above and below the "basic selling price" depending upon conditions of sale.

TABLE 7 : EXPORT WHEAT PRICES : AUSTRALIA  
(Fence per Bushel)

Month	1939 (a)	1943	1944	1945	1946	1947	1948
January	29.00	51.00	57.00	77.00	(116.00)	164.25	244.25
February	29.05	51.00	57.00	77.00	118.50	173.50	250.00
March	27.19	51.00	57.00	(b)	122.00	177.00	250.00
April	28.12	51.00	57.00	(b)	122.00	194.00	250.00
May	30.28	51.00	60.00	(b)	122.00	194.50	250.00
June	28.68	(51.00)	60.00	(b)	122.00	196.00	
July	26.15	(51.00)	60.00	(b)	125.75	196.00	
August	24.96	(51.00)	66.00	(b)	134.00	196.00	
September	29.93	51.00	69.00	(b)	134.00	204.00	
October	32.00	51.00	75.00	(b)	141.00	219.75	
November	(32.00)	54.00	75.00	(b)	149.50	238.00	
December	35.50	57.00	75.00	116.00	164.00	236.00	
Average -	29.37	51.75	64.00		130.90	200.06	

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 1944-45 (No. 8 Pool), 1945-46 (No. 9 Pool), 1946-47 (No. 10 Pool) and 1947-48 (No. 11 Pool) are given in the table below.

TABLE 8 : WHEAT POOL ADVANCES ; AUSTRALIA  
As at 20th May, 1948

Advances	1944-45 Harvest (No. 8 Pool)		(f) 1945-46 Harvest (No. 9 Pool)		(f) 1946-47 Harvest (No. 10 Pool)		1947-48 Harvest (No. 11 Pool)	
	Bulk	Bagged	Bulk	Bagged	Bulk	Bagged	Bulk	Bagged
<u>QUOTA WHEAT (Deliveries by growers up to 3,000 bushels)</u>								
	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	3.11.33	4. 1.33	4.1	4.4	4. 1	4.4	4.6	5.0
Second	0. 9(a)	0.10(a)	1.0(a)	1.0(a)	1. 6(a)	1.6(a)	2.0(a)	2.0(a)
Third	0. 1. 5	0. 1. 5	0.6	0.6	1. 0	1.0	-	-
Fourth	0. 1. 5	0. 1. 5	0.6	0.6	1. 0	1.3	-	-
Total(a)	4.11.33	5. 2.33	(c) 6.2.75	(c) 6.6.25	7. 7	8.1	6.6	7.0
Quantity Acquired	32,818,448 bus.		123,825,000 bus.		98,690,000 bus.		203,000,000 bus. (e)	
<u>NON-QUOTA WHEAT (Deliveries by growers in excess of 3,000 bushels)</u>								
	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	2.10	3. 0	(b)	(b)	(b)	(b)	(b)	(b)
Second	0. 9	0. 9	(b)	(b)	(b)	(b)	-	-
Third	0. 4.33	0. 4.33	(b)	(b)	-	-	-	-
Fourth	0. 9(a)	0.10(a)	(b)	(b)	-	-	-	-
Fifth	0. 1. 5	0. 1. 5	-	-	-	-	-	-
Sixth	0. 1. 5	0. 1. 5	-	-	-	-	-	-
Seventh	-	-	-	-	-	-	-	-
Total(a)	4.11.33	5. 2.33	(b)	(b)	(b)	(b)	(b)	(b)
Quantity Acquired	6,004,987 bus.		(b)		(b)		(b)	

(a) Less freight. (b) Not applicable. (c) Includes a Fifth Advance of 1.75d. (d) Includes a Fifth Advance of 2.25d. (e) Preliminary figure. (f) Excludes refunds of amounts contributed to the Wheat Stabilization Fund. Refunds amounting to approximately 1s. 1.5d. per bushel in respect of the 1945-46 harvest (No. 9 Pool) and approximately 10d. per bushel in respect of the 1946-47 harvest (No. 10 Pool) have been approved but in the case of No. 10 Pool this approval is contingent upon the International Wheat Agreement becoming operative in August, 1948.

Advances under the amended Wheat Industry Stabilisation Plan on wheat acquired under Nos. 6, 7 and 8 pools were made on a different basis from those of previous pools. Under this plan licensed growers were paid an advance on deliveries up to 3,000 bushels (i.e. quota wheat) whilst those delivering in excess of this quantity were paid a lower first advance on that quantity delivered in excess of 3,000 bushels, (i.e. non-quota wheat). For the 1945-46 and subsequent pools, payments have applied to all wheat delivered to the Australian Wheat Board, irrespective of its being quota or non-quota wheat.

An initial advance of 4s. 6d. bulk, 5s. 0d. bagged as been paid in respect of the No. 11 Pool (1947-48 crop). In addition, a second advance of 2s. 0d., bulk and bagged, less freight, has been approved.

9. OVERSEAS FREIGHT RATES : AUSTRALIA

. 7.

The next table gives particulars of the charter rates for wheat shipped to the United Kingdom and Continental ports for the periods stated.

TABLE 9 : 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	102.6
Western Australia			110.0	110.0	110.0	110.0
30th June :						
Eastern States	135.6	135.6	120.0	120.0	120.0	
Western Australia			110.0	110.0	110.0	
30th September :						
Eastern States	135.6	135.6	120.0	120.0	120.0	
Western Australia			110.0	110.0	110.0	
31st December :						
Eastern States	135.6	135.6	120.0	120.0	115.0	
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, 1942 to 1948 are given in the following table.

TABLE 10 : PRODUCTION AND DISPOSAL OF WHEAT : AUSTRALIA  
(Million bushels)

Particulars	Year ended 30th November						
	1942	1943	1944	1945	1946	1947	(a) 1948
Opening Stocks (incl. Flour as Wheat)	42.0	104.5	154.0	77.9	11.5	20.2	13.5
Production	166.7	155.7	109.7	52.9	142.4	117.3	228.4
<u>Total available Supplies</u>	208.7	260.2	263.7	130.8	153.9	137.5	241.9
Exports - Wheat	28.7	18.6	54.3	6.1	19.4	12.0	143.0
Flour as wheat	15.9	18.6	36.9	12.9	37.7	34.0	
Local Consumption -							
Flour as wheat	32.9	34.3	34.5	33.1	32.2	33.5	33.5
Stock Feed	14.7	20.3	40.7	44.9	24.4	22.2	25.0
Breakfast Foods and other uses	1.0	1.0	3.2	3.1	3.0	4.2	3.0
Seed	10.0	8.3	9.0	12.0	13.2	14.0	17.0
Balance retained on Farm (excl. Seed)	1.0	5.1	7.2	7.2	3.8	4.1	5.4
Closing stocks (inc. Flour as wheat)	104.5	154.0	77.9	11.5	20.2	13.5	15.0
<u>Total Disposals</u>	208.7	260.2	263.7	130.8	153.9	137.5	241.9

(a) Subject to revision.

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 given in the following table for each State for the years 1939-47:-

TABLE 11 : 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	17,087	1,196	20,708	17,295	388	77,477
1941	6,232	5,212	817	12,180	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	18,181	396	77,877
1945 -							
Wheat	695	1,848	175	892	2,191	238	6,039
Flour (Tons)	28,895	25,664	3,674	42,000	12,419	987	113,639
Total as wheat	2,082	3,080	352	2,916	2,787	285	11,502
1946 -							
Wheat	10,510	1,994	751	940	884	62	15,141
Flour (Tons)	28,000	35,997	5,521	20,000	15,287	726	105,531
Total as wheat	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

12. PRODUCTION OF FLOUR, BRAN AND POLLARD

The following table shows details of the production of flour, bran and pollard in flour and other grain mills in each State for the year 1938-39, each year 1943-44 to 1946-47 and the periods of nine months ended March, 1947 and 1948.

TABLE 12 : PRODUCTION OF FLOUR, BRAN AND POLLARD  
(Ton = 2,000 lb.)

Period	N.S.W.	Vic.	Q'ld.	S.A.	W.A.	Tas.	TOTAL
1938-39	547,162	436,829	84,314	146,262	138,583	19,582	1,372,732
1943-44	496,853	409,190	125,603	149,892	159,799	17,153	1,358,490
1944-45	516,168	393,036	124,473	194,967	(a)	(a)	(b) 1,412,868
1945-46	451,895	315,525	96,984	164,936	166,791	22,657	1,218,838
1946-47 (c)	535,201	445,634	98,136	204,735	170,163	20,713	1,474,582
Nine months ended -							
March, 1947	433,684	330,522	76,353	155,850	126,448	15,882	1,139,739
March, 1948	370,086	365,879	76,303	160,448	145,817	16,607	1,135,140
BRAN PRODUCED							
1938-39	Tons	Tons	Tons	Tons	Tons	Tons	Tons
1943-44	107,779	95,237	14,199	32,063	34,467	5,655	289,400
1944-45	96,436	84,577	19,955	32,295	38,687	2,924	274,874
1945-46	99,261	76,930	(a)	41,856	38,941	(a)	(b) 280,075
1946-47 (c)	80,545	66,180	13,910	34,238	38,671	4,330	237,874
Nine months ended -	92,363	83,820	14,914	41,442	38,219	3,679	274,437
March, 1947	74,489	62,503	11,465	31,810	28,704	2,826	211,797
March, 1948	66,218	69,424	11,633	32,224	31,939	2,682	214,120
POLLARD PRODUCED							
1938-39	Tons	Tons	Tons	Tons	Tons	Tons	Tons
1943-44	121,154	90,180	20,735	24,979	23,745	3,284	284,077
1944-45	108,489	80,531	31,144	26,749	28,045	4,618	279,576
1945-46	111,214	73,776	31,377	34,556	(a)	(a)	(b) 286,036
1946-47	103,983	64,678	24,646	29,524	26,803	6,298	255,932
1946-47	119,122	89,832	23,819	37,818	26,509	5,720	302,820
Nine months ended -							
March, 1947	97,001	67,011	18,442	28,838	19,694	4,406	235,392
March, 1948	80,916	72,693	18,435	29,798	23,710	4,896	230,498

(a) Not available for publication. (b) Includes particulars for States marked (a).  
(c) Subject to revision.

Further details of the production and stocks of flour, bran and pollard and the quantity of wheat milled for years up to 1946-47 were included in the September, 1947 issue of the Wheat Summary (Vol. 7, No. 6.)

13. EXPORTS OF WHEAT AND FLOUR

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Table 13 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, 1944 to 1947, together with similar details for the periods of nine months ended March, 1947 and 1948.

Detailed tables showing exports of wheat and flour over a period of years according to the countries of destination were included in a previous issue of the Wheat Summary, vide Volume 7, No.6. - September, 1947.

TABLE 13 : EXPORTS OF WHEAT AND FLOUR

Year ended 30th June	N.S.W.	Vic.	Q'ld.	S.A.	U.A.	Tas.	Total
<u>WHEAT</u> (Thousand Bushels)							
1939	15,031	5,233	1,766	18,486	22,613	-	63,129
1944	420	3,951	-	17,230	12,057	-	33,658
1945	194	38	-	16,030	16,129	-	32,391
1946	2,807	-	-	2,747	6,930	-	12,484
1947	3,386	685	-	3,973	4,132	-	12,176
Nine months ended -							
March, 1947	3,381	685	-	3,034	3,227	-	10,327
March, 1948 (a)	9,595	6,961	-	5,551	9,589	-	31,796
<u>FLOUR</u> (Ton : 2,000 lbs.)							
1939	293,168	256,231	4	86,678	88,981	3	725,065
1944	218,850	174,706	2,102	88,027	106,859	-	590,544
1945	172,588	148,658	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
Nine months ended -							
March, 1947	219,610	133,602	453	96,151	94,730	-	544,746
March, 1948 (a)	139,565	211,537	5	97,150	108,287	-	556,544

(a) Subject to revision.

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 was included in a previous issue of the Wheat Summary, vide Volume 7, No. 6. - September, 1947.

15. GENERAL REVIEW : (a) AUSTRALIA

(1) Wheat Industry Stabilization Board. The Wheat Industry Stabilization Plan operated throughout Australia under war-time Commonwealth legislation during each of the seasons 1942-43 to 1947-48. The Plan provides for the registration of farms and licensing of areas by the Wheat Industry Stabilization Board. The area allotted to each grower is 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 1947-48, 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.

(ii) Post-War Wheat Stabilization Plan. Prior to the creation of the Australian Wheat Board in September, 1939, wheat was sold by growers in open market, except in Queensland where a compulsory pool operated under State legislation, or through voluntary pools operated on a co-operative basis in other States. The proportion of wheat passing through the voluntary pools was not very great and during 1938-39 amounted to 1.2 per cent. in Victoria, 4 per cent. in South Australia and 28 per cent. in Western Australia. The pool did not operate that year in New South Wales whilst in Tasmania no such marketing organization was in existence.

At the Premiers' Conference held in January, 1946, it was agreed that joint action should be taken by all Australian Governments to implement a post-war wheat stabilization plan to supersede that which operated during the war years under emergency Commonwealth legislation. Later in that year the Commonwealth Government passed the Wheat Industry Stabilization Act, 1946, the Wheat Export Charge Act, 1946, and Wheat Tax Act, 1946 for the purpose of implementing a permanent stabilization plan, but constitutional limitations of the Commonwealth marketing powers necessitated complementary State legislation in order to make it effective. Appropriate legislation was passed by Queensland, Tasmania, South Australia and Western Australia. In the latter two States, however, the enactments were subject to a poll of growers to ascertain their wishes. In January, 1947, South Australian growers rejected the proposal by a narrow majority, while in Western Australia no poll was taken. In Victoria a bill was passed by the Legislative Assembly but was not submitted to the Legislative Council, while in New South Wales no legislation was introduced.

The failure of some States to pass the necessary complementary legislation precluded the establishment of the Commonwealth's plan on a permanent basis, as provided by its 1946 legislation and the Premiers' Conference in August, 1947 agreed to the extension of the Commonwealth's war-time marketing arrangements to embrace the 1947-48 crop.

The Commonwealth's stabilization plan originally envisaged in the 1946 legislation was subsequently amended in August, 1947 and in January, 1948, following consideration of an interim report on wheat costs of production by the Wheat Cost of Production Committee. The principal provisions of the plan in its present form are as follows:-

- (1) The establishment of a permanent wheat marketing organization, with the necessary authority to acquire and dispose of wheat and with such powers as are defined.
- (2) The establishment of the Wheat Industry Stabilization Board with powers to control and regulate the production of wheat, to register wheat farms and to license persons to grow wheat.
- (3) The preservation of a guaranteed price for a period of seven years up to and including the 1951-52 crop. The guaranteed price was originally fixed at 5s. 2d. per bushel for bagged wheat f.o.r. ports but was amended to 5s. 0d. per bushel bulk basis in August 1947, and from 19th January, 1948, was increased to 6s. 3d. per bushel bulk basis. This increase in price was decided upon following consideration by the Commonwealth Government of the Interim Report of the Wheat Cost of Production Committee.
- (4) The imposition of a tax on wheat when exported at a price in excess of the guaranteed minimum the rate of tax being up to fifty per cent. of the amount at which it is sold in excess of the minimum price. The maximum rate of tax has however, been fixed at 2s. 2d. per bushel bulk basis. The tax is to be paid into a stabilization fund which is to be drawn on to meet the guaranteed price to growers should export prices fall below the minimum price fixed. With the minimum price of 6s. 3d. per bushel bulk basis operating from 19th January, 1948, the maximum tax of 2s. 2d. per bushel will mean that growers will not be required to contribute to the stabilization fund in respect of the amounts by which the export price exceeds 10s. 7d. per bushel bulk basis.
- (5) Should the stabilization fund become exhausted in any one year, the Commonwealth Government, under its guarantee, will provide out of general revenue the funds necessary to bring export prices up to the guaranteed minimum price.

The Commonwealth's plan, as modified in January, 1948, was considered by a conference held in February, 1948 at the direction of the Premiers' Conference of August, 1947, but agreement was not reached and the matter has been referred back for decision by State Cabinets. An Act for the formation of a State Wheat Board has been passed in Western Australia, its continuance after 1951 being subject to a poll by growers.

Although the Commonwealth Government's stabilization plan has not been implemented on a permanent basis in view of the absence of the necessary complementary State legislation it has been put into effect by the Commonwealth Government under war-time marketing legislation 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. Cabinet has decided however that the amounts contributed to the fund from the 1945-46 and 1946-47 harvests will be refunded to growers in proportion to their deliveries during each season. Refunds of contributions from the 1945-46 harvest amounting to approximately 1s. 1½d. per bushel will be paid to growers prior to the end of 1948. The approval to refund contributions from the 1946-47 harvest, which approximate 10½d. per bushel, is contingent upon the International Wheat Agreement becoming operative in August, 1948.

In April 1948 the Commonwealth Government introduced the International Wheat Agreement Bill, 1948, for the purpose of ratifying Australia's commitment to become a signatory to the International Wheat Agreement, referred to in (b) hereafter.

GENERAL REVIEW : (b) AFRICA

(1) General. The grave world shortage of wheat for human consumption focusses attention on the pre-war position as disclosed by available statistics, particularly in Europe where the shortage is so acute. Production in Europe (excluding U.S.S.R.) increased almost continuously from 1923 to 1938 and import requirements decreased in consequence. Details of production of wheat, net imports of wheat and flour as wheat and the total available supplies are given in the following table for the three five-yearly periods ended 1928, 1933 and 1938 and for each of the years 1945 to 1947. These figures have been obtained from official sources but the figures for 1945 to 1947 are largely estimated.

TABLE 14 : PRODUCTION, NET IMPORTS AND SUPPLIES OF WHEAT :  
EUROPE (EXCLUDING U.S.S.R.)  
(In million bushels)

Particulars	Average for five years ended			1945	1946	1947
	1928	1933	1938			
Production	1,244	1,429	1,580	870	1,210	(a) 937
Net Imports (incl. Flour as wheat)	610	570	390	585	(b) 500	(d)
<u>Total available supplies as wheat (c):</u>	1,854	1,999	1,970	1,455	1,710	(d)

(a) Estimated. (b) 1946-47. (c) Disregarding Stocks. (d) Not available.

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, Argentina, 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, the 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 15. 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	48	280
1940-41	280	813	1,093	674	419	34	385
1941-42	385	943	1,328	668	660	28	632
1942-43	632	974	1,606	951	655	33	622
1943-44	622	841	1,463	1,217	246	(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	1,156	1,257	798	459	375	84
1947-48	84	(a)1,365	(a)1,449	(b)849	(b) 600	(c)	(c)
<u>CANADA (AUGUST TO JULY)</u>							
1938-39	25	360	385	174	261	156	103
1939-40	103	521	624	132	492	192	300
1940-41	300	540	840	129	711	231	480
1941-42	480	315	795	149	646	222	424
1942-43	424	556	980	171	809	215	594
1943-44	594	285	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	487	161	326	242	84
1947-48	84	(a) 341	(a) 425	(b) 150	275	(c)	(c)
<u>ARGENTINA (AUGUST TO JULY)</u>							
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	130
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	(a)167	(a)227	(a)104	(a)123
1945-46	(a)123	144	(a) 267	(a)128	(a)139	(a) 69	(a) 70
1946-47	(a) 70	(b) 206	(b) 276	(b)120	(b)156	(b) 95	(b) 61
1947-48	(b) 61	(d) 228	(d) 289	(b)100	(d)189	(c)	(c)
<u>AUSTRALIA (DECEMBER TO NOVEMBER)</u>							
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	58	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	78
1944-45	78	53	131	100	31	19	12
1945-46	12	142	154	78	76	56	20
1946-47	20	117	137	73	59	46	(a)13
1947-48 (a)	13	228	241	83	158	143	15

Net Imports.

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

INDIA

Details of the All-India wheat acreages and yields for 1947 and previous years are given in the following table:-

TABLE 16 : AREA AND PRODUCTION OF WHEAT : ALL INDIA

Year	Area	Production	Average Yield per acre
	Thous.,Ac.	Thous.,Bus.	Bushels
1940	34,003	402,567	11.8
1941	34,862	373,487	10.7
1942	33,979	375,913	11.1
1943	34,298	402,864	11.7
1944	33,740	361,760	10.7
1945	33,709	390,432	11.6
1946	34,559	332,379	9.6
1947	34,121	290,752	8.5

(ii) International Wheat Agreement. An International Wheat Agreement was concluded by the Special Session of the International Wheat Conference in Washington, D.C. on 6th March, 1948. Under this Agreement, which is subject to approval by the Governments concerned, thirty-six nations, including all the important importing countries and the principal exporting countries except Argentina and the U.S.S.R., pledge themselves to co-operate to bring order into the international wheat market.

The Agreement which covers a period of five years commencing 1st August, 1948 and ending 31st July, 1953, provides that the principal exporting countries concerned, viz. Canada, the United States of America and Australia, will guarantee to sell 500 million bushels of wheat (including flour as wheat) annually to the 33 importing countries. The importing countries will guarantee to purchase a total of 500 million bushels of wheat (including flour as wheat) in each of the five years of the Agreement.

The Agreement fixes ceiling and floor prices between which transactions can be freely concluded and prices will move within this range in accordance with market conditions. But at the maximum price, the exporting country must sell the quantity it has guaranteed to supply and at minimum price the importing country must purchase the quantity it has guaranteed to buy.

These basic minimum and maximum prices for No. 1 Manitoba Northern Wheat in store at Fort William/Fort Arthur in terms of Canadian currency at the parity on 1st February, 1948, are given in the following table. Expressed in terms of Australian currency at the exchange rate of \$3.20 to the £., the Australian price equivalent per bushel is also shown.

August / July	Minimum Price		Maximum Price	
	Per Bushel		Per Bushel	
	Canadian Currency	Australian Currency	Canadian Currency	Australian Currency
1948-49	\$ 1.50	9. 4½	2.00	12. 6
1949-50	1.40	8. 9	2.00	12. 6
1950-51	1.30	8. 1½	2.00	12. 6
1951-52	1.20	7. 6	2.00	12. 6
1952-53	1.10	6. 10½	2.00	12. 6

Transactions between signatory exporting and importing countries at prices within the range will count towards fulfilment of the obligations assumed under the Agreement but any country is free to trade in wheat at prices above the ceiling or below the floor in respect of quantities additional to those covered by the Agreement.

The Agreement provides for the formation of a new International Wheat Council on which all nations which ratify the Agreement will be represented. The Agreement makes provision for the Council to review the scale of prices for the third, fourth and fifth year of its term but the maximum cannot exceed \$2.00 nor can the minimum be lower than that originally fixed for the relevant crop year.

The quantity of wheat and wheat flour in terms of wheat which the exporting countries have guaranteed to sell annually during the five year term of the Agreement, totalling 500 million bushels, is as follows:- Canada 230 million bushels, United States of America 185 million bushels and Australia 85 million bushels. The guaranteed purchases by the 33 importing countries during each of the five years of the Agreement, totalling 500 million bushels are as follows (figures in million bushels):- United Kingdom 100, Italy 37, France 36, Netherlands, 31, India 27, Belgium 24, Brazil, Austria and Greece, each 19, China 15, Ireland 13, and the remaining 22 countries, approximately 80.

The Commonwealth Government introduced legislation in April, 1948 for the purpose of ratifying Australia's participation in the International Wheat Agreement.

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CANBERRA, A.C.T.

10TH JUNE, 1948.