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WORLD GRAIN REVIEW AND OUTLOOK, 1945

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with a Statistical Appendix by

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FOOD RESEARCH INSTITUTE

Established at Stanford University, California, in 1921, jointly by Carnegie Corporation of New York and the Trustees of Leland Stanford Junior University, for research in the production, distribution, and consumption of food.

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FOREWORD

Perspective is precious. Often in vain we crave it—perspective in range, in space, and in time. To see in their broader setting the objects on which we focus, to combine significant details on national situations into a world view, to look at the present against the background of the past and to look into the future from such a vantage point: this is a rare achievement, doubly difficult but doubly desirable in the midst of global war. To publish such hard-won results is to render a signal public service.

This is the challenging objective at which the authors of this book have aimed, within a broad but limited field. Wheat, the premier food grain of the Western world, is viewed in the perspective of rice and other grains and their uses. What is virtually a world picture is built up, despite a few blacked-out areas and sundry defects of information. Recent and current developments are set forth in the light of more than a decade past, and these are combined to illuminate various aspects of the nearer and more distant future. The forest is made visible as well as the trees, and many groves are floodlighted as well.

The present work is, in a sense, the outgrowth of nearly 25 years of co-operative research in the Food Research Institute. It utilizes materials, connections, and experience accumulated in the writing of 20 annual reviews of the world wheat situation, more frequent appraisals of short-run developments, and a multitude of special monographs, mostly published in the Institute's completed volumes of *Wheat Studies*. Its authors have long been valued contributors to that series, now terminated, as well as in other fields of scholarship. Their mature grasp of the subjects here dealt with will be evident to readers.

The Statistical Appendix likewise reflects the cumulative materials and experience of the Institute staff. As it stands, however, it is primarily the work of its special architect and master craftsman. The tables are not a routine compilation to underpin and supplement the text. They not only serve these purposes well, but also constitute a research product in their own right. They will be found independently to repay browsing as well as extremely convenient for reference on a variety of subjects.

In harmony with the tradition of the Institute, the authors have not hesitated to go beyond documentable facts to make reasoned estimates and appraisals rather than leave important blanks in the picture. At

many points, details are subject to revision and expansion as more and better information becomes available. Subsequent evidence, however, seldom necessitates major alterations in the essentials of a work so thoroughly done.

No one knows all the answers to all the questions that can be asked about the world grain economy—past, present, and future. Those who go through this book, however, and even those who dip into it only for special purposes, are likely to be surprised to find how many of their questions are answered and how many welcome sidelights are unexpectedly revealed.

The Food Research Institute will observe the reception of this book with more eagerness than usual. If the clientele attracted should be extremely limited, the Institute will be reluctant to devote as much time and talent to continuing work of this general character. If, on the other hand, it proves of interest and value to a substantial group, it will probably be the first of a series, and suggestions from those who use it will be helpful in the preparation of subsequent volumes.

JOSEPH S. DAVIS

March 1, 1945

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Joseph S. Davis kindly read the entire manuscript, while V. D. Wickizer and Karl Brandt contributed useful suggestions with regard to specific portions. On various points, the writers consulted government officials and members of the grain trade and milling industry, who generously supplied valuable information. To all of these individuals the writers wish to express their sincere gratitude. Special acknowledgment is made to the Office of Foreign Agricultural Relations of the United States Department of Agriculture for certain foreign information, and to the Bureau of Agricultural Economics for supplementary data on domestic grain supplies and disposition.

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