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PRODUCTION AND DISTRIBUTION IN THE AUSTRALIAN EGG INDUSTRY.

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During the War, considerable changes have taken place in the Australian Egg Industry, not only in the pattern of production and distribution, but also in organisation. The industry now faces the transition back to a peace-time footing, and it is well to have as clear a picture as possible of what is likely to be involved in this transition.

In this article a review will be made of trends which have occurred on the production and distribution side. These should provide some indication of the problems likely to confront the industry in the future.

Production.

Owing to the inadequacy of reliable statistics, the position as regards egg production in Australia in pre-war years cannot be presented with a high degree of accuracy. From the records of the Egg Boards of New South Wales, Victoria, Queensland and South Australia, and of organised distributors in Western Australia and Tasmania, commercial production sold through organised channels for the years 1934 to 1939 was comparatively stable and in the vicinity of sixty million dozen annually. As regards unrecorded commercial and non-commercial egg production there are no adequate statistics available; and discussion will be limited entirely to recorded commercial production.

In making any comparison with wartime production it must be remembered that the usual figures quoted for the latter are not only more reliable, but are calculated on a different basis, for they are inclusive of production from extended areas. This applies particularly to Western Australia and New South Wales.

The extension of Commonwealth control to Western Australia—2nd August, 1943—resulted in a more satisfactory recording of production in that State. The Supervision Committee which operated previously was only a voluntary organisation.

New South Wales, however, deserves greater attention, for while it produces almost fifty per cent. of Australia's eggs, the so-called "outer area" to-day is accounting for approximately forty per cent. of the State's production. This must be taken into account when examining trends in total Australian production. Up to November, 1941, the New South Wales Egg Marketing Board operated only in the Counties of Cumberland and Northumberland and in the Shires of Nattai and Wollondilly—now referred to as the "Inner Area." After that date, the whole State, with the exception of certain remote country districts, was brought under the control of the Board.

The trend in commercial egg production in New South Wales is set out in Table I. Figures showing separately the producer agent sales in the "inner" and "outer" areas after November, 1941, are not available. In order to indicate the extent of the increased commercial production within the original Egg Board area, a correction has been made for producer agent sales on the assumption that these sales varied proportionately in the same manner as Egg Board receipts for the two areas. It is clear from Table I that during recent years, production has increased more rapidly in the "outer area" than in the "inner area."

TABLE I.
Commercial Egg Production in New South Wales.

Pool Years.	Receipts by Egg Board.			Sales by Permittees.		Total Controlled Production.	Corrected Total for "Inner Area."
	"Inner Area."	"Outer Area."		Total.	Estimate for "Outer Area."		
	'000 doz.	'000 doz.	% of Total.	'000 doz.	'000 doz.	'000 doz.	'000 doz.
1934-35 ...	14,744	.....	.....	5,311	.....	20,055	20,055
1935-36 ...	14,506	.....	.....	6,250	.....	20,756	20,756
1936-37 ...	15,148	.....	.....	5,893	.....	21,041	21,041
1937-38 ...	13,983	.....	.....	6,359	.....	20,342	20,342
1938-39 ...	13,453	.....	.....	6,973	.....	20,426	20,426
1939-40 ...	14,728	.....	.....	8,624	.....	23,452	23,452
1940-41 ...	19,331	.....	.....	9,729	.....	29,060	29,060
1941-42 ...	21,518	5,364*	19.6*	11,653	2,300*	38,535	30,871
1942-43 ...	18,158	8,817	32.60	15,608	5,100	42,584	28,666
1943-44 ...	18,013	9,442	34.38	14,918	5,100	42,035	27,493
1944-45 ...	22,537	12,066	34.87	12,918	4,400	47,369	30,903
1945-46 ...	23,453	14,213	37.73	12,215	4,500	49,881	31,168

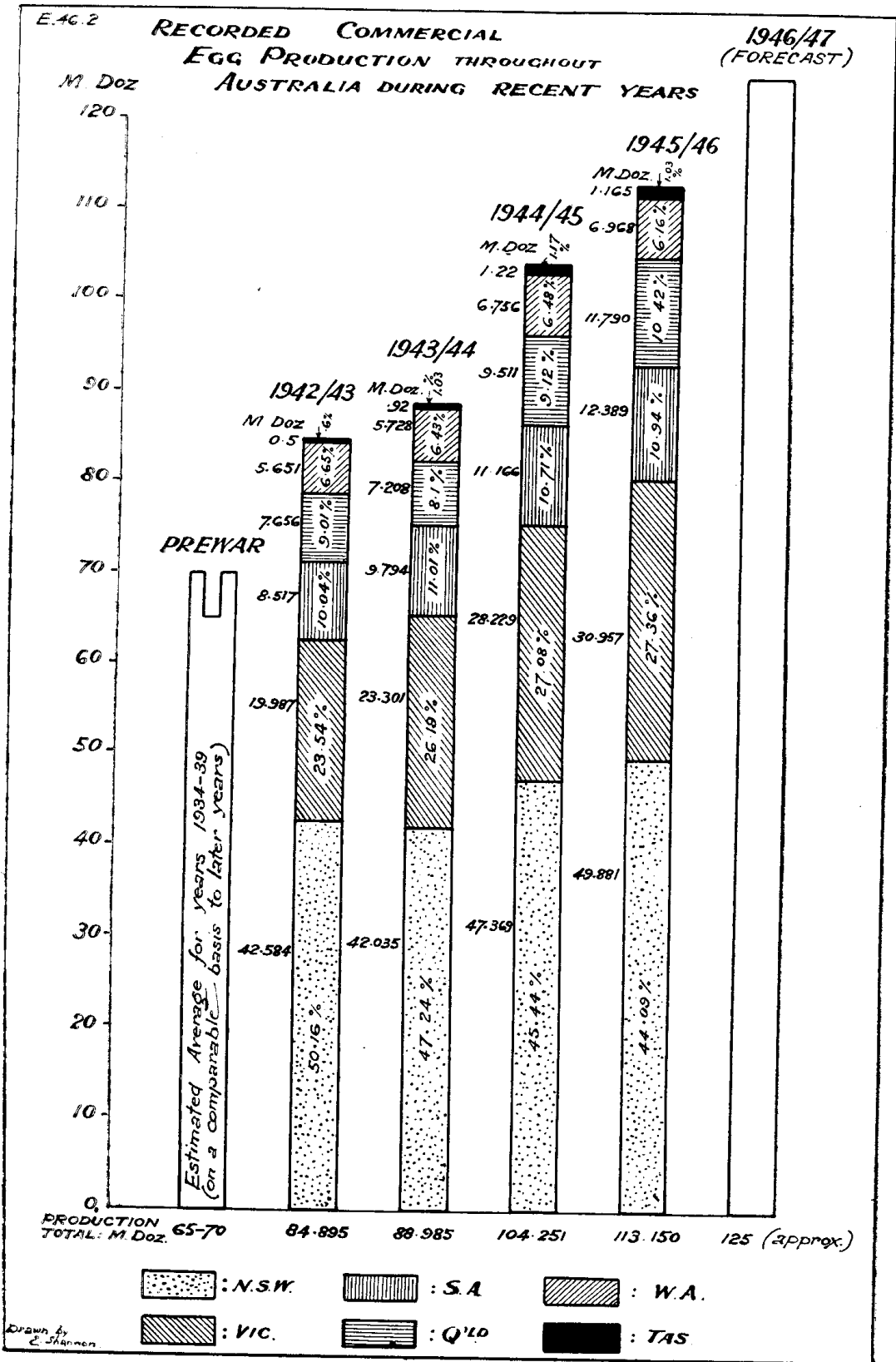
* "Outer Area" included November, 1941 (*i.e.*, not full year figure.)

From the foregoing remarks it is obvious that official statistics for commercial egg production throughout Australia in pre-war years are not comparable with wartime figures. For this purpose, the correct figure to use as the pre-war average would be somewhere between sixty-five and seventy million dozen per annum.

The accompanying chart sets out the trends in the recorded commercial production of eggs throughout Australia since the 1942-43 season. Figures used are based on the records of the Controller of Egg Supplies.

After November 15th, 1943, all producers throughout Australian controlled areas with less than forty laying hens were exempted from control. Before that date all producers with more than twenty had been subject to control. The effect of this on recorded production varied in different States. In New South Wales the effect was negligible, while in Queensland it was quite significant. No accurate information is available, but total recorded Australian production as a result would not have been reduced by more than one million dozen per annum.

An early forecast of a production of 130 million dozen in 1946-47 may have to be modified, particularly in view of the shortage of feedstuffs. However, a production approaching 125 million dozen is to be expected.



Distribution.

The home market has always been by far the chief market, and also the most remunerative market for Australian commercial eggs. The pre-war home market each year absorbed approximately forty-five million dozen eggs in shell. This estimate, however, is not comparable with wartime figures because of extensive changes in the scope of organised marketing during recent years.



View of the Packing Floor at the N.S.W. Egg Marketing Board Premises, Pyrmont.

The only important pre-war overseas market for Australian eggs was in the United Kingdom. Australia was able to exploit that market mainly because of a Customs Duty of from 1s. to 1s. 9d. per dozen, imposed on foreign egg imports by the United Kingdom under the Ottawa Agreement. In addition, of course, Australia had, and still has, a seasonal advantage on this market. As a result Australia is able to land the bulk of its flush period surplus eggs of satisfactory quality in the United Kingdom during the European slack production months. Export price at this time can be expected to reach its highest level.

Export of eggs from Australia during the years 1934 to 1938 averaged 15½ million dozen, but had been showing a decline in the immediate pre-war years. This is indicated by the following figures.

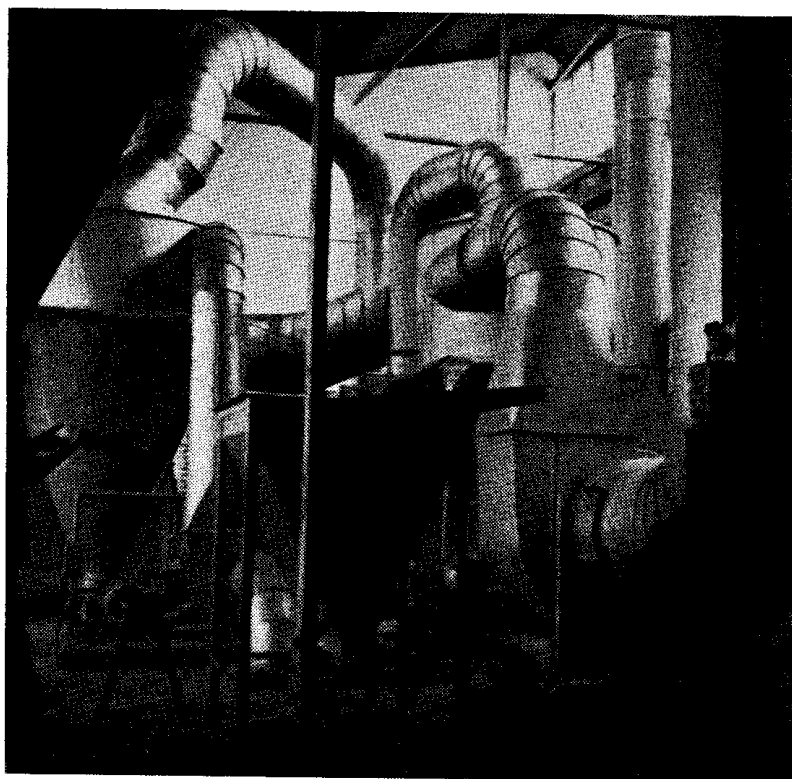
<i>Season.</i>						<i>Export of Eggs.</i>
						<i>m. dozen.</i>
1935-36	..	..	..	..	..	17.4
1936-37	..	..	..	..	..	16.5
1937-38	..	..	..	..	..	11.3

Although exports in the 1939-40 and 1940-41 seasons were 10.3 and 17.9 million dozen respectively, restricted refrigerated shipping space and increased Services' demand in the Pacific area soon resulted in exports of eggs to the United Kingdom being very considerably curtailed. Thus, for the next three seasons the quantities exported declined as follows:

1941-42, 6.3 m. dozen; 1942-43, 2.7 m. dozen, 1943-44, 0.4 m. dozen.

In spite of its loss of the United Kingdom market, Australia's wartime problem did not turn out to be one of over-production. Two reasons accounted for this: (i) a rapid expansion in home market demand for eggs as a result of shortages of other food-stuffs; and (ii) the development of new outlets for eggs and egg products, in particular the Allied Forces in the Pacific Area. A small market for egg pulp and egg powder developed in New Zealand.

While it has been emphasised that our wartime problem was not one of over-production, increased output of eggs occurred chiefly in the high-producing months (August to November) thus greatly accentuating the seasonal problem of distribution. Production in the four months August to November was about four times greater than the period March to June. In these high-producing months a very large surplus remained over and above total civilian and services demands for eggs in the shell.



Portion of an Egg Drying Plant—Riverstone, N.S.W.

It was necessary, therefore, to exploit all possible avenues for the handling of this surplus. Processing of eggs received much attention. Increased production of egg pulp was encouraged in all States, and by 1944-45 pulping operations were being conducted at eleven centres in Australia: Brisbane, Sydney, Newcastle, Young, Melbourne, Bendigo, Ballarat, Adelaide, Port Lincoln, Perth and Hobart. The plants at Brisbane, Young, Port Lincoln, Perth and Hobart were not supervised by the Department of Commerce and Agriculture; their output was diverted entirely to the home market. The pulping plant in Hobart, which has operated since 1944, has obviated the necessity of transferring surpluses from Tasmania to the pulping plants in Victoria.

The organisation of egg drying was also important. After 1943, production was greatly expanded, drying plants being operated at Riverstone (New South Wales), Footscray (Victoria), Perth and Adelaide.

The extent of the production of egg pulp and egg powder in Australia during recent seasons is set out in Table 2.

TABLE II.

Production of Frozen Egg Pulp and Dried Whole Egg Powder.

	1943-44.	1944-45.	1945-46.
Eggs converted to pulp	doz. 13,385,164	doz. 19,300,190	doz. 26,089,022
Eggs converted to powder	10,550,600	15,053,009	11,087,412
Percentage of the July to December period production converted to pulp and powder	58%	62%	50%

A small quantity (441,750 dozen) was used in the production of tinned ham and eggs for the U.S. Services in 1943-44. Cold storage continued to account for a small proportion of the summer surplus. Stored eggs were, however, diverted from the civilian market to the Services up till 1944-45, when 739,070 dozen were placed in cold store for civilian use.

Although the main problem during flush production periods was the satisfactory utilization of surplus production of fresh eggs, in the months January to June, supplies were insufficient to meet all civilian and Services' demands. Thus it was necessary to introduce a scheme of restricted sales to consumers during this period in the two years 1944 and 1945. The scheme provided for a reduction of sales to civilians, on the part of both Controller's Agents and Permittees, to fifty per cent. of the quantity sold in October, 1943, when all demands were considered to be met in full. The quantities sold to civilians in October, 1943, were as follows:

Sales to civilians by Controller's Agent, 3,530,553 dozen.

Sales to civilians by Permittees, 3,268,260 dozen.

The extra quantities released as a result of the scheme were diverted to the Services during these slack production months.

Table 3, based on figures supplied by the Controller of Egg Supplies, sets out in comparative form the distribution of controlled production over the last three seasons.

TABLE III.

Distribution of Eggs Produced under Commonwealth Control.

	1943-44.		1944-45.		1945-46.	
	'000 doz.	%	'000 doz.	%	'000 doz.	%
Sales in Shell—						
To civilians by Permittees ...	25,015	28.11	23,353	22.4	22,400	19.79
To civilians by Controller Agents ...	26,243	29.49	34,436	33.01	37,004	32.08
To Services by Controller Agents ...	13,213	14.85	11,289	10.83	8,542	7.55
Used in Production of Pulp for Australian Distribution ...	10,604	11.92	17,570	16.85	24,227	21.41
Used in Production of Dried Whole Egg Powder ...	9,811	11.02	14,993	14.38	11,087	9.79
Exported to New Zealand—						
Frozen Egg Pulp ...	2,781	3.96	1,730	1.66	1,862	1.65
Dried Whole Egg Powder ...	739	...	...	...	...	...
Exported to Ceylon—						
Eggs in Shell ...	...	...	106	...	...	...
Dried Whole Egg ...	...	...	60	...	...	...
Packed for export in the shell to United Kingdom ...	...	...	...	...	7,225	6.39
Sundry Disposals (including rejections) ...	580	...	714	...	802	...
Total ...	88,986	...	104,251	...	113,149	...

All surplus pulp from the 1944-45, 1945-46 seasons which came up to export standard was sold to the United Kingdom. The latter also accepted all the egg powder from the 1945-46 season which remained after services' demands had been met.

The above figures may be used as a basis for more detailed discussion of the probable pattern of Australian egg distribution in the future.

Home Consumption.

Table 4 sets out the quantities of eggs and egg products consumed in Australia during the last three seasons.

TABLE IV.

Consumption of Eggs and Egg Products in Australia.

	1943-44.	1944-45.	1945-46.
	m. dozen.	m. dozen.	m. dozen.
Civilian Markets—			
Eggs in Shell ...	51.25	57.78	59.50
Frozen Egg Pulp*	8.3	10.3	12.0
Australian Services*	7.0	8.4	2.5
Total...	66.55	76.48	74.00

* Figures approximate.

In view of these figures, it would appear that the increase in home market demand during the war period reached its peak in 1944-45. With other foodstuffs becoming more plentiful, a fairly rapid decline in the home demand was to be expected. Without knowing the exact pre-war consumption, it is impossible to estimate the probable extent of this downward trend, but the total home consumption (i.e., including pulp) in 1946-47 should exceed seventy million dozen.

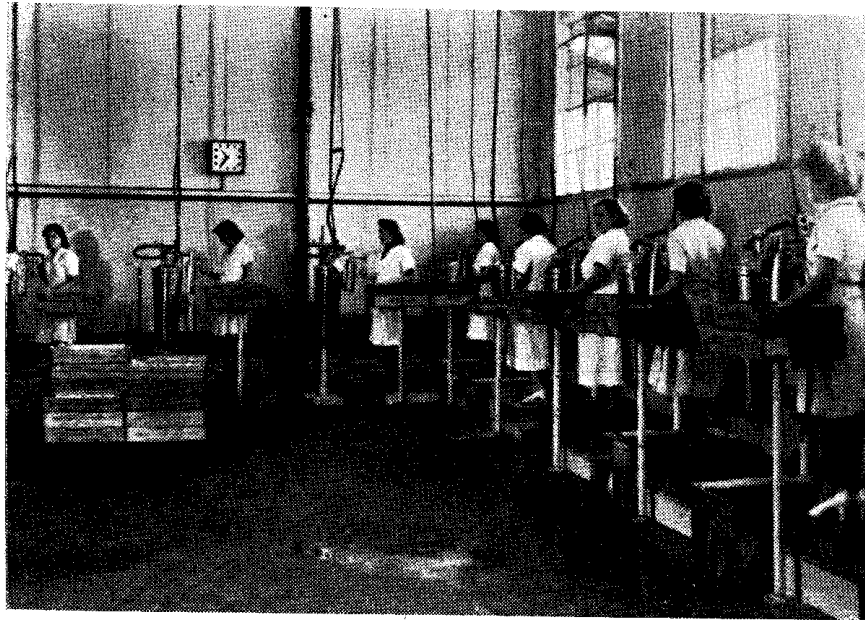
It may well be possible by direct measures, permanently to raise the normal egg consumption in Australia, which nutrition experts say is below the desirable level. As a "protective" food, eggs could play an important part in the maintenance and improvement of the diet of the people, and there is justification for a definite campaign to encourage an increased consumption of eggs for this purpose. However, while it is admitted that, from a nutritional point of view, there is some room for the improvement of the *per capita* consumption of eggs in Australia, claims as to the extent to which this can be brought about by the use of propaganda are often greatly exaggerated. Eggs in Australia are an expensive item of diet, and as a result their consumption is related to the general level of income. If the latter falls, we can expect a natural downward trend in the egg consumption of lower income groups. In the higher income groups, spring and summer egg consumption no doubt approaches saturation point, as regards the present pattern of consumer tastes in Australia. As a general rule, lowering of prices to the consumer should encourage greater consumption, but in the case of eggs, the commercial surplus-producing months are also the months in which backyard production is at its peak. A considerable reduction in price during this period would not produce a very significant rise in home consumption.

Cold storage provides a means of holding some of the flush period production for sale during the winter months. It is well, however, to realise the distinct limitations of this practice. The process involves extra costs—storage, transport, testing, handling, etc.—as well as an average loss of some fifteen per cent. from deterioration. To cover these, there must be a sufficient difference in price between the period in which the eggs are stored and the period in which the stored eggs are sold. As far back as 1930, when some 700,000 dozen eggs were cold stored, an estimated loss of £6,500 was sustained because of an over-supply during the winter; the price received for the stored eggs was not sufficiently remunerative. One week's surplus from New South Wales during the spring would be more than sufficient to meet all cold storage possibilities for this season.

In each of the seasons 1936-37 and 1937-38, 860,000 dozen were stored and this amount approximated to the safe limit for those years. The deterioration problem will be difficult to overcome completely. Cold storage is mainly concerned with surpluses from the two months January and February, which are climatically the most unsuitable for satisfactory storage. It is necessary,

however, that the surpluses from these months be used in Australia, because climatic conditions then are even more unfavourable for the maintenance of export quality. In addition such eggs would only command minimum export prices, as they would reach Britain during the high-production months in Europe.

Little need be said of any other form of processed eggs than egg pulp. While some 0.85 million lbs. of dried whole egg powder (equivalent to approximately $2\frac{1}{2}$ million dozen eggs), were supplied to the Australian Services in 1943-44, the Australian civilian demand for the product can be regarded as negligible. The home market for pulp, however, should remain fairly stable, absorbing in the vicinity of 15 million lbs. per annum, i.e., 12 million dozen eggs.



Vacuum Extractor Egg Pulping Machines at the Egg Drying Plant, Keswick, South Australia.

Pulp production for the home market proves an avenue for the disposal of surplus eggs unsuitable for export; but there is a definite upper limit to the Australian market for pulp. The proportion of eggs produced in Australia not suitable for export is in the vicinity of twenty per cent. On the basis of present methods, the Controller of Egg Supplies estimates, that out of a production of 100 million dozen, 12 million dozen would be diverted as Australian market pulp. As a result of the critical food position during the last two years, Great Britain accepted large quantities of Australian whole egg powder. If this had not been so, several millions of pounds of unsaleable second-quality pulp already would have accumulated in Australia.

Australia has a definite overseas market in the immediate years for surplus production, but this does not mean that all the surplus will be sold. For this to be possible the percentage of eggs of exportable quality, graded out of the eggs received, must be sufficient to remove the surplus completely from the home market.

Records from the New South Wales Egg Board indicate that in recent weeks the percentage of "exportable" eggs obtained from the intake has not been sufficient to allow an optimistic outlook. This can be traced mainly to the alarmingly low percentage of eggs which are of export quality when received by the Board, but also to some extent to the inadequate handling facilities of the present Board premises.

There are two factors which will contribute towards the successful handling of surplus production this season. First, the standard of eggs, both for export in the shell and for export pulp, has been considerably lowered for this year by the Department of Commerce and Agriculture, and secondly, under our present contract with the United Kingdom the realisation from export in the shell will be almost identical with that from export as pulp. These advantages, however, can only be regarded as temporary.

Mention only will be made here of the question of interstate marketing of eggs and egg products. During pre-war years, uncontrolled movements of surplus production across State borders did result in considerable losses to the industry as a whole. Commonwealth control has been able to prevent what may be termed "unnecessary interstate transfers." Its success in this direction has added support to the view, that a comprehensively empowered central organisation could best direct future marketing of Australian surplus egg production.

Export Possibilities.

The wartime Services' demand for eggs and egg products has now become unimportant, and Australia must look again to the United Kingdom as the chief outlet for surplus production over home market requirements.

The British Ministry of Food has contracted to purchase from Australia the following quantities of eggs and egg pulp:

1946-47.—Equivalent of 47 million dozen eggs (to include 20 million lb. of pulp).

1947-48.—Equivalent of 60 million dozen eggs (to include 36 million lb. of pulp).

The price to be received under this contract is equivalent to 1s. 4d. net (Australian) per dozen.

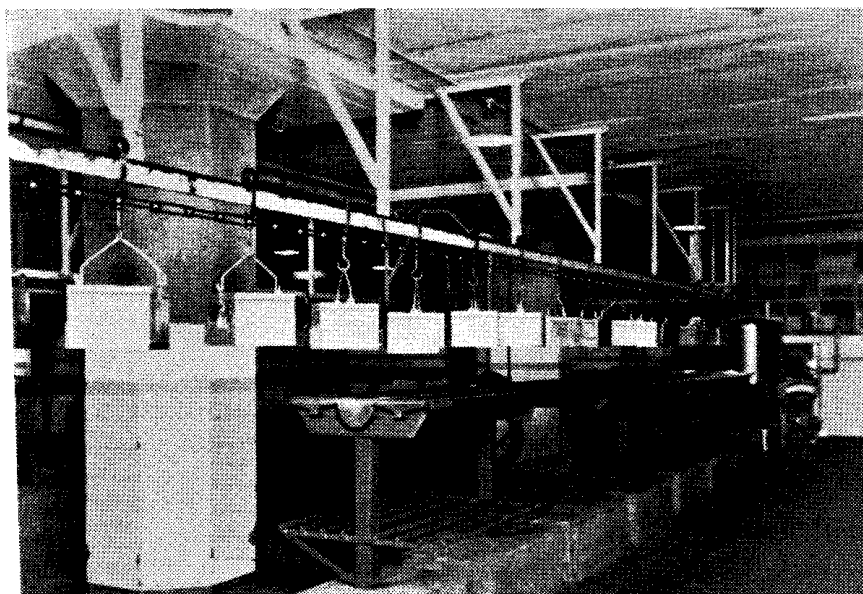
It appears, therefore, that we can expect little difficulty during the next two seasons as regards the disposal of any surplus *which measures up to export quality.*

With a net return of 10s. per hen, an Australian poultry-farmer keeping 1,000 laying hens can count on an income of approximately £7 a week. On the basis of present costs, Mr. E. Hadlington, poultry expert of the New South Wales Department of Agriculture, estimates the net return per hen for such a farmer at around 8s. 9d.

Thus, at the present level of productive efficiency, there is apparently little scope for lowering prices paid to the farmer without causing considerable hardship. However, it must be realised that barring subsidies, no marketing organisation can pay the farmers more than it receives from sales. The poultry farmer

to-day is receiving 3d. per dozen more than marketing boards receive for exported eggs; the result of price equalisation. It is clear that with over forty per cent. of the production exported—without direct subsidisation of the Industry—any large fall in export price must be reflected in a fall in price to the producer.

Assuming no extensive reduction in farmers' costs of production during the next two years, the Australian poultry industry is leaving itself open to grave risk if it attempts to keep short-term commitments with Great Britain, without at the same time looking further into the future. While feed shortages will make the rapid recovery of European egg production difficult, it is safe to assume that by 1948 certain of the chief pre-war exporters of eggs in the shell—in order, Denmark, the Netherlands, Poland, Danzig, Ireland, and China—will again be offering strong competition on the United Kingdom market. With a possible reduction of Empire preference, not only reduced contracts, but also reduced prices for those contracts, may well be experienced. Australia has the permanent disadvantage of distance from its chief export market; five weeks are required to ship eggs to the United Kingdom at a cost of approximately 5d. per dozen.



A Section of an Egg Pulping Room—Waterside Cold Stores, Pymont, N.S.W.

There is little immediate prospect of an alternative export market for Australian eggs. While there are markets in Asia and the Pacific, these are not payable to the average Australian producer at his present cost of production.

Egg Pulp.—Only very small quantities of pulp were exported from Australia before the War. During the War, however, production was greatly encouraged to help to meet local Services' demands. A carry-over of three million lb. of pulp from the 1944-45 season was sold to the United Kingdom in 1945-46, as well as a considerable proportion of the production in that season.

A small market for pulp developed in New Zealand during the War. New Zealand has agreed to purchase approximately 2.4 million lbs. of pulp during 1946-47.

We have in Australia the potential plant to produce much more pulp than our own requirements, and in fulfilling our contracts with Great Britain will need to produce some fifty million lbs. in 1947-48. The present British contract price for pulp is unprecedentedly high, and it is almost certain that these contracts will not be renewed in future years at the same price. China, the chief exporter of pulp before the War is from all reports quickly expanding production, and on her past record will be able to sell pulp in the United Kingdom at a price considerably lower than that provided for in the Australian contract.

Tinned Ham and Eggs.—In 1943-44, 441,750 dozen eggs were used in making this product for the United States Forces. There is no visible market for tinned eggs in the future.

Powdered Eggs.—The war-time production of egg powder saved the Australian egg industry from serious financial loss. Egg powder, with its small bulk and excellent keeping quality, could be transported satisfactorily to the tropics, or stored for long periods. It provided a means of carrying over, and disposing of, surplus production as well as saving refrigerated shipping space.

The Armed Services in the Pacific absorbed the bulk of the egg powder production in 1943-44 and 1944-45. With the loss of this outlet, it is evident that we will be unable to support continued extensive production of egg powder without finding some alternative market. Difficulty has already been experienced with the disposal of all the 1945-46 production. The fact that dried eggs have been completely omitted from the present contracts is a clear indication that we should not expect further orders for the product from Great Britain.

The difficulties in the preparation of egg powder for cooking, linked with its comparatively high price, are sufficient to close civilian markets to the product wherever fresh eggs or egg pulp are available.

Conclusion.

Production of eggs in Australia greatly increased during the war period. Viewed on a comparable basis, this increase would be from less than 70 million dozen per annum in pre-war seasons, to 113 million dozen in 1945-46. Recorded production in New South Wales has more than doubled, mainly as a result of the inclusion of country areas, together with their rapid increase in production.

In order to meet the Home Market requirements, and also keep our contract with the United Kingdom in the coming season, production will need to be in the vicinity of 120 million dozen. An early forecast of 130 million dozen appears to be rather out of proportion to visible demand, but the existing feed shortages and the reported rising costs to the farmer may well cause production to fall short of this amount.

To fill the United Kingdom contract for 1947-48 without requiring restricted sales on the home market, a production of approximately 130 million dozen will be required.

With the United Kingdom contract we have, for the coming two seasons, an assured outlet and a satisfactory guaranteed price for all our surplus production which measures up to export quality. Our immediate problem, however, is that from past experience we cannot expect a sufficient percentage of eggs to reach export standard.

While production remains above 100 million dozen per annum, there is the definite possibility of a growing surplus of Australian market quality pulp. The disposal of such a surplus in future seasons will be extremely difficult, particularly with the absence of any market for powdered eggs.

Viewing the markets for Australian eggs and egg products on a long-term basis the home market and the United Kingdom will be the most important.

The home market demand for eggs should remain at a permanently higher level than pre-war, given that incomes are maintained. More efficient distribution, so as to make supplies more readily available to the consumer throughout the whole year, will help slightly to increase total home consumption. Only very minor improvements are to be expected from a direct campaign to encourage the eating of more eggs.

There will be an Australian market for pulp in the future, probably capable of absorbing about 15 million dozen eggs annually.

While Europe remains short of food, there is an assured overseas market for Australian eggs. However, as the pattern of international trade is gradually restored, Australia will be faced with competition to an extent likely to reduce market possibilities by a substantial amount. The uncertainty of Empire preference makes the future even less easy to forecast.

It is not suggested that action should be taken to restrict egg production in Australia. Restricted production, besides being extremely difficult to implement, would make it impossible to fill the United Kingdom contract, and would directly encourage the continuance of inefficient methods.

However, the difficulties which confront the egg industry have become acute with the present high level of production, and to prevent large losses in the future, certain changes are necessary. These changes will admittedly call for considerable expenditure on the part of the industry. It is evident that two principal objectives should be pursued:

1. An immediate attempt should be made to reduce the percentage of eggs produced, which cannot be diverted to the export trade. This alone will prevent saturation of the home market. Eggs are a perishable product and deserve attention comparable with butter or meat. Each farm needs a cool room in which eggs may be stored until collected; refrigerated trucks should be provided for transporting eggs from the farm to the Marketing

Board; the Boards' premises in many instances need to be modernised and extended so as to allow for speedy handling of eggs during the flush production period.

2. Strong attempts should be made to induce farmers to adopt more efficient methods. This will ease the position when export prices fall—assuming they do—at the termination of the present contract. If existing production costs are not substantially lowered, farmers would experience great hardship in the event of falling export price.

The present contract period provides a breathing space for the industry. Producers should be warned of the likely fall in price within the next three or four years. During that period, every attempt must be made to make the egg industry capable of competing successfully on the world market with foreign producers. If this can be achieved, then there will be no need for a reduction in current levels of production.

“WORLD FOOD SURVEY.”*

A REPORT FROM F.A.O.

A report has just come to hand from the United Nations Food and Agriculture Organisation entitled, “World Food Survey.” This is not just another statement on the seriousness of the present world food supply position, of which we have had several lately. It tackles the matter from a long-term viewpoint, and instead of starting from present available supplies, starts from the other end, from the end of average consumption per head. The report summarises the results of a survey made earlier this year of food consumption in seventy countries, covering about 90 per cent. of the earth's population. As the report states, “Millions of people never get enough to eat, and much larger numbers, not actually hungry, do not obtain the kind of diet necessary for health.” While admittedly much of the statistical data used were vague and incomplete, it was felt that the results of the survey were “close enough to the truth to be used, with due caution, as a yardstick by which to measure changes that will be required if we are not to return to the unsatisfactory food situation which existed in the years before the war, but to have a food and agriculture policy that will meet human needs.”

The Pre-war Picture.

It appears that before the war over half the world's population (most of Asia, a part of the Middle East, all of Central America, and probably parts of South America and of Africa not covered by the survey) had an average daily intake of less than 2,250 calories daily, calculated at the retail level. One-sixth (most of Southern Europe, three countries in Asia, part of the Middle East, part of Africa, and part of South America) had an intake of between 2,250 and 2,750 calories daily. The remaining one-third (all of North America, Oceania, much of Europe—including the U.S.S.R.—and three South American countries) were in the high-

* “World Food Supply,” Food and Agricultural Organisation of the United Nations, 5 July, 1946. (39 pages.)