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was decided to appoint a sub-committee to examine the general powers and functions of the Committee of Direction of Fruit Marketing established under the Queensland Fruit Marketing Organisation Act and the question of the suitability of a similar Act to provide for the setting up of such an organisation in this State. The sub-committee has had preliminary discussions on the subject but the stage has not been reached where any definite expression of opinion can be made in that connection.

### **What of the Future?**

The foregoing gives only a brief general outline of vegetable growers' organisational activities in New South Wales but enough has been said to demonstrate that producers as a whole are alive to the difficulties that confront them and are taking all possible steps to minimise, at least, many of their troubles.

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## **WORLD FOOD NEEDS.**

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The shortage of food, which was severe in many countries during the war, has since the cessation of hostilities become even more acute. The countries most affected are those in which fighting has actually taken place or which warfare closely touched, such as the United Kingdom, Continental Europe, Japan, China and the Philippines.

### **Factors Inhibiting Production.**

The reasons why supply cannot meet demand are many. Where fighting occurred, agriculture has been disorganised considerably. Farms have been abandoned, farmlands rendered unfit for cultivation, and machinery and working animals destroyed, resulting in a substantial reduction in crop acreage. Excessive slaughtering of livestock due to the lack of other food, the commandeering of herds by the occupation forces, and the lack of feedstuffs caused a reduction in livestock numbers. This resulted in decreased production of meat and dairy products. Moreover, transport services have been disrupted in many areas, limiting the distribution of rural products and causing severe local shortages. Where production was not directly interrupted, shortage of labour, fertilisers and machinery limited the output of primary produce.

The re-establishment of agriculture in southern Europe and North Africa has been hampered by the drought conditions which were experienced during 1945. Moreover, production in countries of the Southern Hemisphere which are normally exporters of food also was seriously affected by droughts. Since most of the food-deficient countries are normally importers of food, they will be even more dependent on the production of the exporting countries, until such time as they can re-establish their own agriculture.

**Increases in Demand.**

Whilst the supply of foodstuffs throughout the world has been reduced, the demand has increased substantially since pre-war years. This is due to two main factors: the increase in total population and the expansion in purchasing power in many of the surplus-producing countries. Shortages in particular foods, especially the "protective" foods, are accentuated by the increased demand for relief purposes in liberated countries where wartime rations have been extremely low.

In summary, most of Europe and Asia is on the verge of starvation with no hope of increasing production at home for at least several months. The Americas and Australia have surplus goods which are being made available to these countries.

**The Position by Commodities.**

Let us now examine world food requirements and the extent to which they can be met.

*Wheat.*—Wheat is one of the most important sources of food, comprising 20% of the world food consumption. The 1945 grain harvest in Europe was estimated to be the smallest for twenty years, due to the general disorganisation resulting from the war, to drought, and to fertiliser shortages. Countries which have been particularly affected include France, Spain, Italy, Germany, the Balkans, Poland and the United Kingdom, all important producers of wheat. Hungary, Yugoslavia and Poland, which produced surplus quantities of cereals before the war, now require imports to supplement their own supplies. Some of the largest wheat and rye producing areas, supplying approximately 37% of the average annual continental trade in wheat and 63% in rye, are now under control of the U.S.S.R. Such products will not be available to alleviate the position in other European zones not under Russian control. Other former wheat exporting countries which will need to import this year include North Africa, India, Brazil and China.

The main supplies of wheat for 1945-46 will come from North America which, it is estimated, will supply 75%-80% of the total world wheat exports. In the first six months of the present crop year Canada shipped 204 million bushels. A total of 650 million bushels will probably be exported from the United States and Canada during the present year. However, transport difficulties are limiting exports from these two countries during the winter. Australia hopes to export 55 million bushels of wheat this year, whilst 50 million bushels will be available to Europe from Argentina if the wheat requirements of other South American countries remain at the 1945 level.

*Feedstuffs.*—Shortage of feed grains is widespread, the position being particularly acute in Europe where it is doubtful whether sufficient will be available to maintain the already reduced numbers of livestock. The United Kingdom, France, The Netherlands, Belgium and Denmark are the countries requiring the largest

quantities. Other feedstuffs are also in short supply. A limited volume of the latter may be available from Argentina but total supplies fall short of the demand.

*Rice.*—Rice comprises 20% of the world's food supply and is the staple food of the dense population of Asia. Little improvement in the rice supply is expected during 1946 owing to the decreased production in the main producing and consuming countries. Rice production in south-eastern Asia has been substantially reduced during the Japanese occupation. Before the war, approximately 95% of the world's rice supply was produced in the southern and eastern parts of Asia, including Japan, Netherlands East Indies and the Philippines. Japan is now in need of large quantities of rice. As a result of small crops in China and India last year, China will need up to 1 million tons and India up to 2 million tons of rice during 1945-46.

The former chief rice-exporting countries, Burma, Siam and Indo-China, will export a maximum of 1½ million tons this year compared with a pre-war annual tonnage of about 6 million tons. No rice will be exported from Spain and Italy, both of which normally produce surpluses. The United States may have some quantities available for shipment overseas.

*Sugar.*—It is estimated that world production of raw sugar will approximate 30 million tons, which is substantially lower than the pre-war production average of 34,400,000 tons. Shortages are being experienced, particularly in countries which have to rely on imports, as reserve stocks from the previous year have reached very low levels. The 1946 sugar requirement of Europe is estimated to be 2¼ million tons including 1½ million tons needed by Britain. Total production of sugar in the Philippines for 1945-46 is expected to be only one-fortieth of the volume of normal exports (1 million tons) to the United States. This will be insufficient to meet even local demands. Sugar for export will be available from Australia, the Fiji Islands, Africa and Cuba. Production in South and Central America, which exported sugar before the war, has increased by 20%, but the increased local demand as a result of the expanded purchasing power of the population precludes any exports from these sources.

*Fats and Oils.*—Requirements of fats and oils are high in the liberated areas of Europe while production is well below the pre-war level and thus no easing of the severe rationing can be expected this year. A deficiency of 100,000 tons in Britain's oil supply during 1946 is anticipated. China's need for vegetable oils is estimated to be 45,000 tons. Only 25-30% of the normal whale oil production of 510,000 tons will be reached this year.

As it cannot be expected that production in the Pacific and Far East, which exported 35% of fats and oils entering world trade, will reach pre-war levels for some time, the shortage of these commodities will continue. Some supplies are available from North America and Argentina where production expanded during the war. Consumption of fats and oils in some surplus-producing countries of South America, however, has increased with greater purchasing power.

*Meat.*—The present shortage of meat in Europe is expected to continue for some time since livestock numbers, as previously mentioned, have been considerably reduced and supplies of feed are limited. Expanded meat exports from North America and countries of the Southern Hemisphere have not compensated for the decrease in Europe, which now produces little more than two-thirds of the pre-war level. One estimate places China's needs for meat and fish at 250,000 tons.

Supplies of meat are available from the United States, Canada, Argentina, Uruguay, Paraguay, Australia and New Zealand. Output in the countries of the Southern Hemisphere was reduced considerably during 1945 but more should be available this year.

Australia hopes to export 300,000 tons of meat to Britain in 1946. Canada has reintroduced meat rationing thus releasing an additional 67,000 tons for export. The 1946 export target for Canada now approximates 355,000 tons.

*Fish.*—Throughout the war years, fish has been in short supply. Now, owing to the widespread deficiency of meat, there is an even greater demand for fish than normally would be the case. The recovery of the fishing industry depends largely on the availability of vessels, labour and equipment. It is estimated that supplies will fall short of demand by 100 million pounds for dry salted fish and by more than 750 million pounds for canned fish. Japan, which just before the war exported annually about 150 million pounds of canned fish and 45 million pounds of cured fish, has restricted production considerably in recent years.

Supplies of canned fish are available for export from the United States, Canada, Spain and Portugal, South Africa, South American countries, Norway, Angola and other African areas, and exports from these countries during 1945-46 may total 475 million pounds.

*Dairy Products.*—Although the output of dairy products has increased over the last year, supplies will still be inadequate to meet the demands of Europe and the Far East. Production of these foods in every European country except Denmark is insufficient to meet domestic requirements.

Supplies of cheese are sufficient but the butter situation has deteriorated. The output of condensed and evaporated milk in the United States and Canada is double pre-war levels, and has expanded in Australia and New Zealand. Nevertheless production may not be sufficient to meet all needs for some time.

*Eggs.*—Egg production for some months at least will be well below the requirements of the United Kingdom and European countries. Output in the United Kingdom which even before the war imported 40% of her requirements, was reduced by about one-third during the war. Imports are required by continental countries which formerly exported approximately 3,500,000 cases annually. Exports from Denmark, normally one of the most important exporting countries, will total only 5% of pre-war exports during 1945-46.

Canada is supplying the United Kingdom with the equivalent of 3,300,000 cases per year, whilst total exports of eggs from Australia are expected to reach 88 million dozen in the current season. The United States may have a surplus of 20 million cases in the spring, the volume depending largely on the level of domestic consumption. Argentina also exports this product.

#### **International Control of Food Distribution.**

Present indications point to a continuance of food shortages for at least two or three years.

In 1942, the Combined Food Board was established and has fulfilled a very important function in allocating supplies of foods and related production materials, such as fertilizers and farm machinery, in such a way as to achieve an equitable distribution of these commodities among the Allies. The Board, furthermore, has recommended increases in production or decreases in consumption of foods where desirable. The work of such an organisation continues to be of the greatest value in the present situation, even though actual wartime conditions no longer prevail.

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Much of the information contained in this article was obtained from the U.S.D.A. publication "The World Food Situation in 1945-46."