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CANADA
DEPARTMENT OF TRADE AND COMMERCE
DOMINION BUREAU OF STATISTICS
AGRICULTURAL BRANCH

WORLD TRADE IN WHEAT FLOUR
CALENDAR YEARS
1926 - 1938



OTTAWA
1940

Price 50 cents

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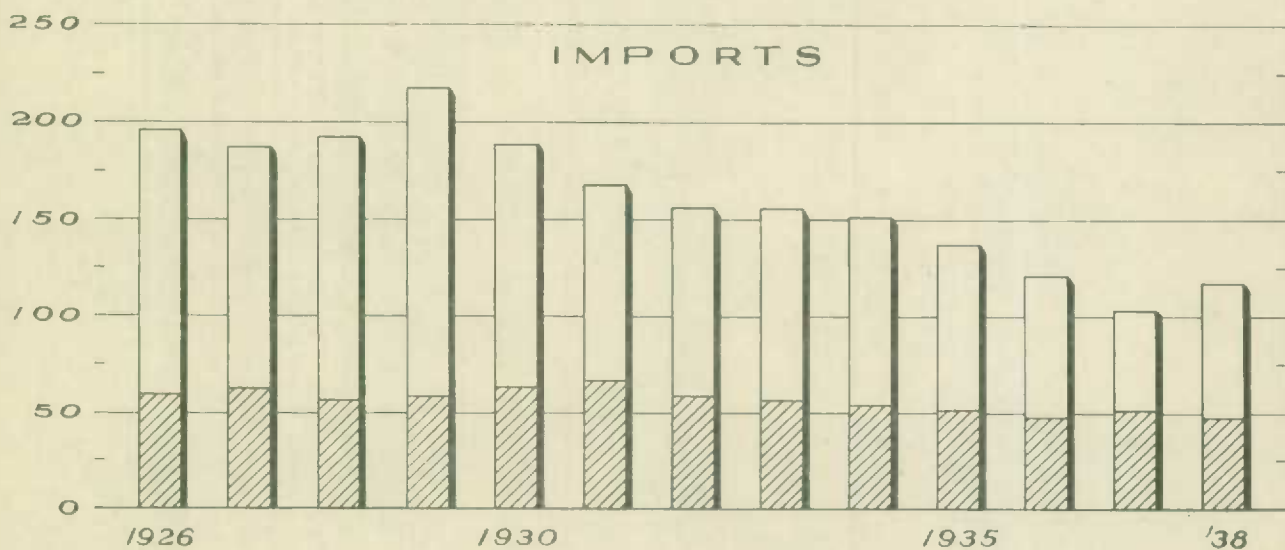
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WORLD EXPORTS AND IMPORTS OF WHEAT FLOUR CALENDAR YEARS 1926 - 1938

MILLION
BARRELS



DEPARTMENT OF TRADE AND COMMERCE
DOMINION BUREAU OF STATISTICS - CANADA
AGRICULTURAL BRANCH

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INTRODUCTION

The following survey shows by statistical tables and diagrams the world trade in wheat flour for the calendar years 1926-38.

The first pages of the report include figures taken from the Annual Reports of the International Institute of Agriculture for these years. It should be pointed out that when reference is made to the first five-year averages, the period covered is 1926-30, and the second five-year period is 1931-35.

EXPORTS

The world gross exports of wheat flour showed a 19 per cent reduction during the second as compared with the first five-year period, the decrease in the average being 7,805,741 barrels.

Canada was the leading exporter among British Empire countries and second in the world during the five years 1926-30. The average of 9,509,166 barrels was almost double that of Australia, the nearest competitor in the Empire. In the second five-year period, however, Canada's average receded to 5,266,878 barrels and Australia's rose to 6,310,612, which made the latter country the chief exporter of the world and relegated Canada to third place. Canada's exports of wheat flour commenced to fall off in 1930, whereas Australia's rose a little from the average, so that by 1932 positions were reversed. The gap has widened each year since, except in 1936 and 1937 when Australia suffered a slight drop from the average. In 1938 there was a decided increase in Australia's exports but Canada's continued to decline. It must be remembered that during the period 1933-37 Canadian wheat production was the lowest in many years and naturally this affected flour exportation.

The United Kingdom ranked third in the Empire and fourth in the world as a wheat flour exporter during 1926-30, but dropped to sixth place in the latter grouping during 1931-35. Altogether, there is a marked falling off in the United Kingdom exports since 1933, but the extremely low figure for 1937 was somewhat increased in the following year.

Until 1933 the United States was the world's largest exporter of wheat flour. The years 1931 and 1932 witnessed serious decreases from the average for the five-year period just preceding and the decline continued until 1935, although the average for the five years 1931-35 was second only to Australia's. Subsequent increases brought the 1938 total up to this standing also.

Hungary took second place among foreign exporters in 1926-30, although outranked by the three leading British Empire countries. In the next five years this position was occupied by Japan, with France and Italy third and fourth respectively. Argentina dropped from fourth in the first to fifth in the second period, the actual decrease being comparatively small in relation to the decline in world exportation. Germany showed an increased average for 1931-35 due to abnormally large exports in 1933 and 1934 but they have since dwindled to a negligible quantity. Among the lesser exporters, Algeria, Poland, Danzig and Tunisia all showed increases, as did the Union of Soviet Socialist Republics until 1938 when only 149,000 barrels were exported.

IMPORTS

World imports of wheat flour also declined during the years 1926-38.

The average for the five-year period 1931-35 was 30,682,365 barrels as compared with 39,375,984 barrels for the previous five years, a decrease of over 22 per cent. Total imports have been below this average for the past four years.

The greater part of the decrease has been in imports into foreign countries--the amounts coming into British Empire countries remained fairly constant.

The world's largest importer of wheat flour is the United Kingdom, whose average during the five years 1926-30 was 5,940,602 barrels; this was decreased by only 620,813 barrels in the next five-year period (1931-35). In the following three years further reductions took place, due, no doubt, to the increased efficiency of British flour mills.

Hong Kong is shown as the next largest wheat flour importer in the British Empire at present, but of course most of this is re-exported. Formerly Eire held second rank but since 1932 drastic decreases have been made in Irish importations until they are now quite insignificant.

A comparison of five-year averages shows decreased imports into British Malaya, Ceylon, New Zealand, South Africa and Other British countries; and increased amounts coming into Jamaica, Newfoundland, Palestine, Trinidad and Tobago, Anglo-Egyptian Sudan, British Guiana, Mauritius, Cyprus, Malta and Aden. However, British Malaya and Other British countries have increased their imports since the 1931-35 average, while Mauritius and Cyprus have failed to uphold their respective five-year averages.

FOREIGN COUNTRIES

The bulk of the world imports of wheat flour were received into other than British Empire countries. It is rather surprising to find that the leading importer on the average is China, which is ordinarily the third largest wheat producer in the world. The average of 4,245,555 barrels for the first five-year period (1926-30) was practically halved in the second (1931-35), but Manchoukuo's imports more than accounted for the difference. The latter country made its first appearance as a separate entirety in the world market in 1932 and since then has been in receipt of the largest individual total import of wheat flour each year but one (1938).

Only eleven of the foreign countries shown in this review increased their imports in the second five-year period (1931-35) over the average for the first (1926-30). None of these increases was very great with the exception of France, which was more than doubled. The Italian Aegean Islands and Cyrenaica figures are hardly comparable, and those for the Phillipines show a relatively small fluctuation.

The decreased imports into the various other foreign countries more than counterbalanced these increases. The most outstanding reductions are shown in the following:-

Difference in Averages 1926-30 and 1931-35.

	<u>Barrels</u>
Czechoslovakia	1,898,105
Egypt	1,609,376
Brazil	1,554,055
Netherlands	1,113,583
Austria	1,006,275
Greece	675,298
Finland	633,681
Germany	550,586
Cuba	313,756

Only two of these countries, the Netherlands and Germany, showed increases in the next three years (1936-38), and the latter not very great. The amounts imported into the Netherlands Indies, the Philippines, Puerto Rico, Chosen, Guatemala, Hawaii, Indo-China, Senegal, Formosa and Venezuela were fairly constant throughout the thirteen years under review. On the whole, imports into countries outside the British Empire showed a decided decline.

In tables on pages 20 and 21 the imports of the principal countries are taken from the Trade Returns and are compared with those shown by the International Institute of Agricultural Statistics. It will be noted the imports shown by the principal countries covered by their individual Trade Returns, make up a large percentage of the total amounts computed from the latter totals.

In the short review preceding each table of imports of the various countries (30 in all) it has been endeavoured to show the movements of the trade, the number of flour mills with their capacities and, where possible, the peculiar requirements of the wheat flour trade in each country.

It was originally intended to show the import duties as taken from the tariffs of the different countries but as these change quite frequently, especially during war time, it was thought it would be misleading, therefore, they have not been shown in this publication. For up-to-date information on tariffs it would be advisable to communicate with the Chief of the Foreign Tariff Division, Department of Trade and Commerce.

It will be observed the United Kingdom tariff quotations have been left intact as they are more or less of a permanent nature.

The following table shows the world exports and imports of wheat flour during the years 1914 to 1925 which covers the last war and post war period.

Calendar Year	Exports	Imports
	(Barrels)	
1914	30,542,996	24,030,631
1915	27,643,611	24,079,183
1916	32,507,738	25,886,751
1917	31,040,480	23,829,909
1918	41,780,236	33,065,955
1919	50,247,834	39,080,242
1920	35,223,787	32,190,688
1921	34,986,810	34,633,001
1922	36,268,032	34,884,662
1923	42,532,124	37,712,377
1924	48,728,009	38,265,610
1925	41,057,963	36,111,021

Countries like Puerto Rico, Formosa, Chosen (Korea) Hawaii, Italian Aegean Islands, Guatemala, Bolivia, Syria and Lebanon, Libya and Senegal do not show their wheat flour imports by countries of origin and in some of these, trade returns are not available.

The publications consulted in compiling the data in connection with this survey were the trade returns of the various countries, the Grain Trade Report 1938, the weekly Commercial Intelligence Journals, the Northwestern Millers Almanac, 1939, and Technical Bulletin 535, entitled Wheat Requirements in Europe by J. K. Shollenberger, Principal Marketing Specialist of the United States, Bureau of Agricultural Economics.

World Trade in Wheat Flour

World gross exports of wheat flour, with quantities exported from British Empire and Foreign countries during the calendar years 1926 to 1938 and five-year averages for 1926-30 and 1931-35, were as follows:-

<u>Calendar Year</u>	<u>World Exports</u>	<u>British Empire Exports</u>	<u>Foreign Countries Exports</u>
	(Barrels)		
1926	40,723,624	18,408,445	22,315,179
1927	39,348,145	17,852,859	21,495,286
1928	40,459,564	18,943,284	21,516,280
1929	42,662,760	18,293,214	24,369,546
1930	40,784,060	15,522,966	25,261,094
5-year average	40,795,651	17,804,154	22,991,477
1931	36,947,759	15,404,386	21,543,373
1932	31,777,905	15,692,786	16,085,119
1933	33,026,335	14,891,922	18,134,413
1934	32,566,740	13,950,230	18,616,510
1935	30,630,712	14,517,473	16,113,239
5-year average	32,989,890	14,891,359	18,098,531
1936	27,522,526	12,884,361	14,638,165
1937	27,115,344	12,194,064	14,921,280
1938	28,825,730	13,757,326	15,068,404

The chief countries contributing to the above total are Australia, Canada, United Kingdom, Hong Kong, British India, British Malaya, Aden, Union of South Africa, and Southern Rhodesia.

<u>Calendar Year</u>	<u>Australia</u>	<u>Canada</u>	<u>United Kingdom (Barrels)</u>	<u>Hong Kong</u>	<u>British India</u>	<u>British Malaya</u>
1926	4,813,212	10,456,928	2,306,866	-	698,316	51,790
1927	5,366,675	9,262,946	2,391,034	-	689,053	52,731
1928	4,878,471	10,737,278	2,501,140	-	669,967	46,195
1929	5,553,375	9,573,890	2,469,385	-	535,750	54,445
1930	4,936,091	7,514,786	2,298,739	-	591,864	38,594
5-year average ...	5,109,565	9,509,166	2,393,433	-	637,110	48,751
1931	5,659,819	5,697,275	2,350,290	1,083,305	492,667	41,618
1932	6,274,865	5,131,833	2,735,313	1,098,489	320,908	64,677
1933	6,251,919	5,570,397	1,772,138	998,831	133,178	45,442
1934	6,373,961	5,053,771	1,653,021	532,935	133,402	66,026
1935	6,992,494	4,881,113	1,482,050	732,026	195,942	64,902
5-year average ...	6,310,612	5,266,878	1,998,562	889,117	255,219	56,533
1936	5,705,261	4,850,068	1,344,148	563,867	203,253	66,814
1937	5,796,258	4,086,997	891,637	547,333	629,556	74,012
1938	6,924,668	3,911,864	1,203,997	723,928	754,635	64,789

Calendar Year	Aden	Union of South Africa	Southern Rhodesia	Other British Countries
		(Barrels)		
1926	38,926	1,696	12,530	27,581
1927	54,480	1,579	8,760	25,601
1928	51,555	1,518	9,337	47,823
1929	31,760	751	18,022	55,836
1930	23,212	2,738	16,522	100,420
5-year average	39,987	1,656	13,034	51,452
1931	25,871	1,575	19,459	32,507
1932	24,746	900	16,422	24,633
1933	44,992	35,994	11,811	27,220
1934	49,717	39,368	14,735	33,294
1935	63,327	35,656	11,248	58,715
5-year average	41,731	22,699	14,735	35,274
1936	56,353	38,918	12,598	43,081
1937	54,103	47,579	20,472	46,117
1938	62,764	46,342	24,071	40,268

x Other British Countries include Zanzibar.

Calendar Year	United States	Foreign Countries				Argentina
		Japan	Italy	France	Hungary	
			(Barrels)			
1926	12,413,955	1,676,311	295,173	347,008	1,654,858	1,599,221
1927	13,424,572	1,366,117	210,946	62,842	1,748,446	1,908,240
1928	12,461,283	2,195,771	290,982	24,655	2,208,757	1,901,941
1929	14,284,667	2,700,906	744,366	23,887	2,951,742	1,540,787
1930	13,681,566	1,950,073	579,376	3,233,314	2,588,020	1,173,177
5-year average ...	13,253,208	1,977,836	424,169	738,221	2,230,364	1,624,673
1931	10,245,669	2,075,162	868,803	3,993,525	1,402,526	968,911
1932	6,385,096	3,023,602	1,572,934	1,658,645	672,636	651,827
1933	4,559,755	4,054,603	1,772,476	2,334,656	552,844	1,112,887
1934	4,742,199	3,626,500	2,062,002	2,233,873	551,157	1,241,903
1935	3,879,807	4,338,505	2,320,258	1,724,446	592,437	996,019
5-year average ...	5,962,505	3,423,674	1,719,295	2,389,029	754,320	994,310
1936	4,291,713	2,241,971	1,706,112	1,494,985	609,310	897,373
1937	5,115,861	2,367,163	1,871,346	1,304,667	649,915	1,070,819
1938	5,869,034	3,804,557	1,125,260	932,692	431,365	945,290

Calendar Year	Germany	U.S.S.R.	Algeria	Poland Danzig	Tunisia	Other Foreign Countries
				(Barrels)		
1926	818,570	73,148	69,333	61,443	43,341	3,262,823
1927	408,519	216,031	41,292	8,883	29,493	2,069,905
1928	625,714	184,413	167,632	1,027	43,873	1,410,232
1929	744,745	143,829	80,099	35,169	64,301	1,055,648
1930	330,828	173,918	138,744	220,593	104,033	1,087,452
5-year average ...	585,676	153,267	99,420	65,423	57,008	1,777,212
1931	25,083	338,230	64,114	317,871	100,221	1,143,258
1932	235,310	346,329	167,034	154,211	84,586	1,132,909
1933	2,022,633	352,965	311,460	87,735	89,535	882,864
1934	2,026,570	579,840	508,752	184,919	280,528	578,267
1935	140,826	339,580	441,713	742,825	222,375	374,448
5-year average ...	890,084	391,389	298,615	297,512	155,449	822,349
1936	324,958	630,906	386,822	1,158,329	188,631	707,055
1937	48,367	643,729	267,367	267,255	136,889	1,177,902
1938	37,794		317,759	351,053	165,347	1,088,253

Imports

World gross imports of wheat flour with quantities imported from British Empire and Foreign Countries during the calendar years 1926 to 1938, with five-year averages 1926-30 and 1931-35.

<u>Calendar Year</u>	<u>World Imports</u>	<u>British Empire Imports</u> (Barrels)	<u>Foreign Countries Imports</u>
1926	39,188,137	11,934,117	27,254,020
1927	37,563,816	12,430,428	25,133,388
1928	38,661,698	11,276,609	27,385,089
1929	43,524,762	11,950,325	31,574,437
1930	37,941,511	12,635,373	25,306,138
5-year average	39,375,984	12,045,370	27,330,614
1931	33,642,392	13,193,908	20,448,484
1932	31,067,249	11,690,374	19,376,875
1933	31,127,431	11,268,235	19,859,196
1934	30,186,640	10,821,797	19,364,843
1935	27,388,112	10,011,933	17,376,179
5-year average	30,682,365	11,397,249	19,285,116
1936	24,071,385	9,607,678	14,463,707
1937	20,630,363	10,107,542	10,522,821
1938	23,443,853	9,600,028	13,843,825

Chief British Empire Importing Countries

The importing countries in the British Empire contributing to the foregoing total are as follows: United Kingdom, Hong Kong, Eire, Jamaica, British Malaya, Newfoundland, Palestine, Trinidad & Tobago, Ceylon, Anglo-Egyptian Sudan, British Guiana, Mauritius, New Zealand, Cyprus, Malta, Union of South Africa, Aden and Other British Countries.

<u>Calendar Year</u>	<u>United Kingdom</u>	<u>Hong Kong</u>	<u>Eire</u>	<u>Jamaica</u>	<u>British Malaya</u>	<u>Newfound- land</u>	<u>Palestine</u>
	(Barrels)						
1926	6,092,016	-	1,826,428	289,752	566,223	361,233	225,761
1927	6,263,347	-	1,931,982	332,325	652,128	368,240	204,142
1928	5,101,029	-	1,814,117	408,533	605,202	389,468	241,519
1929	5,544,802	-	1,778,601	384,313	649,978	371,274	309,806
1930	6,701,817	-	1,903,588	320,210	636,653	372,467	156,191
5-year average	5,940,602	-	1,850,943	347,127	622,037	372,536	227,484
1931	6,141,125	1,142,132	1,929,724	347,180	571,966	379,848	190,318
1932	4,874,027	1,325,026	1,694,189	367,138	525,511	369,275	225,637
1933	5,624,725	756,997	792,879	446,662	535,522	423,603	302,799
1934	5,398,301	746,986	334,856	402,232	663,075	458,360	277,716
1935	4,560,767	998,944	130,253	409,093	678,485	454,648	380,073
5-year average	5,319,789	994,017	976,380	393,661	594,912	417,147	275,308
1936	4,780,892	656,102	79,637	427,765	703,569	422,141	344,529
1937	4,879,988	777,244	67,039	367,138	776,906	450,149	307,298
1938	4,387,321	928,643	57,815	413,593	741,137	412,130	220,013

Chief British Empire Importing Countries

<u>Calendar Year</u>	<u>Trinidad and Tabago</u>	<u>Ceylon</u>	<u>Anglo- Egyptian Sudan</u> (Barrels)	<u>British Guiana</u>	<u>Mauritius</u>	<u>New Zealand</u>
1926	282,606	205,610	119,095	184,492	73,295	274,400
1927	285,788	222,794	139,476	157,818	109,136	146,162
1928	310,599	234,135	122,706	176,221	131,127	96,899
1929	324,574	226,650	163,559	176,915	109,141	99,741
1930	302,966	229,065	162,569	156,135	102,909	97,324
5-year average ..	301,307	223,651	141,481	170,316	105,121	142,903
1931	329,682	214,501	170,971	168,272	117,430	120,580
1932	309,210	207,977	182,107	160,735	94,259	132,728
1933	340,255	176,145	137,902	179,407	106,407	113,831
1934	339,693	194,255	197,629	195,829	166,472	111,581
1935	333,844	219,001	243,184	184,131	108,207	124,854
5-year average ..	330,537	202,376	186,358	177,675	113,555	120,715
1936	352,853	164,560	152,862	173,896	91,110	77,612
1937	341,267	163,660	207,977	174,908	111,469	3,712
1938	350,828	179,295	195,155	186,044	104,270	337

<u>Calendar Year</u>	<u>Cyprus</u>	<u>Malta</u>	<u>Union of South Africa</u> (Barrels)	<u>Aden</u>	<u>Other British Countries</u>
1926	119,549	129,291	292,126	91,029	801,211
1927	143,371	136,740	213,954	113,463	949,562
1928	191,527	98,384	326,514	113,875	914,764
1929	182,915	125,007	332,877	93,817	1,075,855
1930	123,591	145,301	203,290	85,051	936,246
5-year average ..	152,191	126,945	285,752	99,447	935,527
1931	233,511	151,624	48,479	88,185	852,380
1932	309,435	123,954	3,824	83,798	701,544
1933	314,834	149,375	5,849	106,632	754,411
1934	229,686	139,589	10,911	113,831	840,795
1935	71,313	90,322	6,861	143,301	874,652
5-year average ..	231,756	130,973	15,185	107,149	804,756
1936	96,621	113,493	7,986	123,842	838,208
1937	183,232	101,683	4,612	113,268	1,075,992
1938	-	133,965	5,849	140,039	1,143,594

Chief Foreign Importing Countries

<u>Calendar Year</u>	<u>China</u>	<u>Philippines</u>	<u>Netherlands</u>	<u>Netherlands East Indies</u>	<u>Finland</u>	<u>Austria</u>	<u>Norway</u>
(Barrels)							
1926	2,913,805	753,690	1,596,672	693,150	968,964	1,625,470	662,921
1927	2,600,707	759,119	1,853,608	736,767	977,289	1,808,658	779,058
1928	4,069,622	853,520	1,964,010	820,860	1,522,942	1,356,631	810,428
1929	8,115,779	872,797	1,407,745	846,525	1,539,451	1,617,048	806,474
1930	3,527,862	793,426	1,796,583	892,177	1,136,625	1,740,870	733,113
5-year average.	4,245,555	806,510	1,723,725	797,396	1,239,054	1,629,735	758,398
1931	3,324,601	888,712	1,288,695	895,686	923,357	1,319,402	758,122
1932	4,512,850	778,593	351,728	799,627	616,733	543,508	544,521
1933	2,201,366	780,393	505,602	804,464	575,003	325,295	566,454
1934	670,049	782,530	437,664	878,589	518,200	448,237	504,815
1935	574,216	803,677	467,021	918,070	393,571	480,856	485,131
5-year average.	2,256,616	806,781	610,142	859,287	605,373	623,460	571,808
1936	348,804	1,030,888	704,581	803,452	312,472	300,099	438,901
1937	341,830	846,869	727,865	862,617	238,797	226,424	360,839
1938	2,865,791	1,040,112	761,721	959,913	357,465	171,871	461,060

<u>Calendar Year</u>	<u>Brazil</u>	<u>Cuba</u>	<u>Egypt</u>	<u>Czecho- slovakia</u>	<u>Puerto Rico</u>	<u>Denmark</u>	<u>Chosen</u>
(Barrels)							
1926	2,489,834	1,233,567	2,200,423	2,463,824	392,824	623,319	343,733
1927	2,296,495	1,301,045	1,749,228	1,968,719	414,136	722,981	351,145
1928	2,352,619	1,245,409	1,778,723	1,969,264	430,865	874,423	407,690
1929	1,832,068	1,260,366	2,626,472	1,842,457	438,260	733,883	433,180
1930	1,712,854	1,084,316	2,203,850	2,142,510	419,533	787,239	-
5-year average.	2,136,774	1,224,942	2,111,739	2,077,355	419,124	748,369	307,150
1931	689,621	933,592	1,713,311	306,286	393,908	758,684	342,842
1932	56,353	850,469	657,226	407,181	395,596	491,317	304,036
1933	546,658	798,503	59,165	163,997	404,257	398,295	285,252
1934	1,109,625	945,403	45,892	10,011	379,961	242,509	392,671
1935	511,339	1,027,964	36,219	8,774	376,136	174,683	772,407
5-year average.	582,719	911,186	502,363	179,250	389,972	413,098	419,442
1936	571,516	1,002,431	34,532	12,035	425,066	94,147	462,747
1937	464,659	1,056,363	26,321	2,475	432,264	94,821	299,087
1938	483,443	1,026,239	40,831	2,362	428,553	222,937	283,227

x Figures from Cuban Trade Returns not included in Totals.

Chief Foreign Importing Countries

<u>Calendar Year</u>	<u>Venezuela</u>	<u>Guatemala</u>	<u>Haiti</u> (Barrels)	<u>Hawaii</u>	<u>French Indo China</u>	<u>Germany</u>
1926	288,471	150,458	315,533	127,088	214,266	1,368,385
1927	264,641	151,807	281,857	138,253	240,715	668,792
1928	315,694	207,094	367,335	134,303	255,717	433,108
1929	290,759	201,744	420,987	136,852	248,430	340,915
1930	308,047	162,271	223,571	153,377	252,361	249,585
5-year average..	293,522	174,674	321,856	137,975	242,298	612,158
1931	315,284	160,398	264,668	151,624	206,628	120,467
1932	244,759	171,534	224,287	144,651	184,806	91,672
1933	223,050	134,415	127,778	143,976	172,996	37,006
1934	217,988	148,250	146,338	149,375	182,219	28,008
1935	214,614	115,406	121,367	150,387	201,453	30,707
5-year average..	243,139	146,001	176,888	148,003	189,620	61,572
1936	238,572	89,310	133,740	144,538	207,865	6,411
1937	279,065	98,083	119,005	180,082	213,714	543,846
1938	-	108,544	86,160	161,185	273,104	384,235

<u>Calendar Year</u>	<u>Greece</u>	<u>Bolivia</u>	<u>Syria & Lebanon</u> (Barrels)	<u>Senegal</u>	<u>Formosa</u>	<u>Tunisia</u>
1926	1,670,297	304,239	365,607	90,986	193,924	26,620
1927	750,833	310,037	246,595	92,876	177,110	12,527
1928	552,555	191,568	474,168	109,589	190,136	20,356
1929	351,187	238,091	405,602	97,439	201,408	8,423
1930	160,612	216,816	162,151	126,606	184,214	4,860
5-year average..	697,097	252,150	330,825	103,499	189,358	14,557
1931	60,515	102,358	111,244	94,147	220,575	6,299
1932	16,760	33,407	230,811	96,846	226,649	10,686
1933	7,761	28,008	479,282	101,345	190,093	41,168
1934	9,786	32,282	308,423	135,990	245,996	121,030
1935	14,173	62,202	60,965	160,173	313,597	28,345
5-year average..	21,799	51,651	238,145	117,700	239,382	41,506
1936	9,448	55,903	48,929	143,413	318,096	56,353
1937	9,111	81,549	53,327	169,959	257,581	81,549
1938	14,623	113,493	48,929	117,093	309,773	86,048

<u>Calendar Year</u>	<u>Tripolitania</u>	<u>Manchoukuo</u>	<u>Italian Aegean Islands</u> (Barrels)	<u>Cyrenaica</u>	<u>France</u>	<u>Other Foreign Countries</u>
1926	64,368	-	-	-	53,925	3,057,657
1927	95,972	-	-	-	81,536	3,300,882
1928	123,195	-	-	-	219,359	3,333,906
1929	157,636	-	130,982	91,153	163,434	3,716,887
1930	179,341	-	136,867	116,172	288,732	3,359,597
5-year average..	124,102	-	53,569	41,465	161,397	3,353,786
1931	298,862	-	137,677	227,774	187,056	3,246,089
1932	332,044	2,779,968	143,301	218,438	187,618	2,728,900
1933	281,990	5,693,901	129,578	289,414	341,267	3,021,464
1934	311,010	5,883,544	123,392	207,865	690,183	3,057,008
1935	354,203	5,235,203	200,216	275,016	651,265	2,156,823
5-year average..	315,622	3,918,523	146,833	243,701	411,478	2,842,056
1936	567,017	2,367,950	137,902	264,105	599,074	2,533,410
1937	304,261	882,413	-	156,911	412,355	1,049,517
1938	-	2,697,294	-	-	464,884	899,174

Quantities and Percentages Used in Wheat Flour Charts

Gross Exports

Five-Year Average 1926 to 1930

	<u>Barrels</u>	<u>Per Cent</u>
Total World Exports	40,795,631	100.00
British Empire Exports	17,804,154	43.64
Canada	9,509,166	23.31
Australia	5,109,565	12.52
United Kingdom	2,393,433	5.87
British India	637,110	1.56
Other British Countries	154,880	.38
Foreign Exports	22,991,477	56.36
United States	13,253,208	32.49
Hungary	2,230,364	5.47
Japan	1,977,836	4.85
Argentina	1,624,673	3.98
France	738,221	1.81
Germany	585,676	1.43
Italy	424,169	1.04
Other Foreign Countries	2,157,330	5.29

Gross Imports

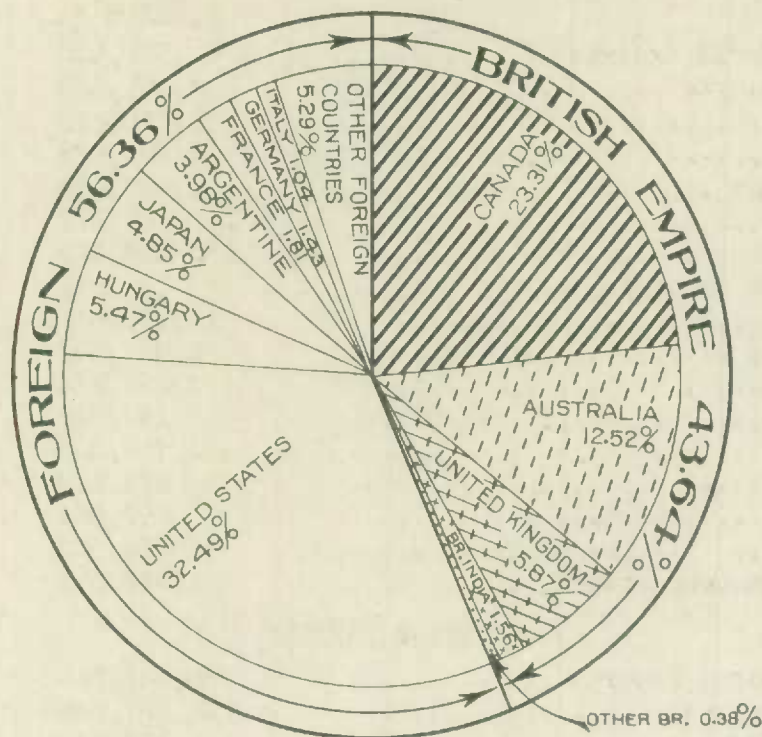
Total World Imports	39,375,984	100.00
British Empire Imports	12,045,370	30.59
United Kingdom	5,940,602	15.09
Eire	1,850,943	4.70
British Malaya	622,037	1.58
Newfoundland	372,536	.95
Jamaica	347,127	.88
Trinidad and Tobago	301,307	.76
Union of South Africa	285,752	.72
Palestine	227,484	.58
Ceylon	223,651	.57
British Guiana	170,316	.43
Cyprus	152,191	.39
New Zealand	142,903	.36
Anglo Egyptian Sudan	141,481	.36
Other British Countries	1,267,040	3.22
Foreign Imports	27,330,614	69.41
China	4,245,555	10.78
Brazil	2,136,774	5.43
Egypt	2,111,739	5.36
Czechoslovakia	2,077,355	5.27
Netherlands	1,723,725	4.38
Austria	1,629,735	4.14
Finland	1,239,054	3.15
Cuba	1,224,942	3.11
Philippines	806,510	2.05
British East Indies	797,396	2.03
Norway	758,398	1.93
Denmark	748,369	1.90
Greece	697,097	1.77
Germany	612,158	1.55
Other Foreign Countries	6,521,307	16.56

WHEAT FLOUR

FIVE-YEAR AVERAGE 1926-30

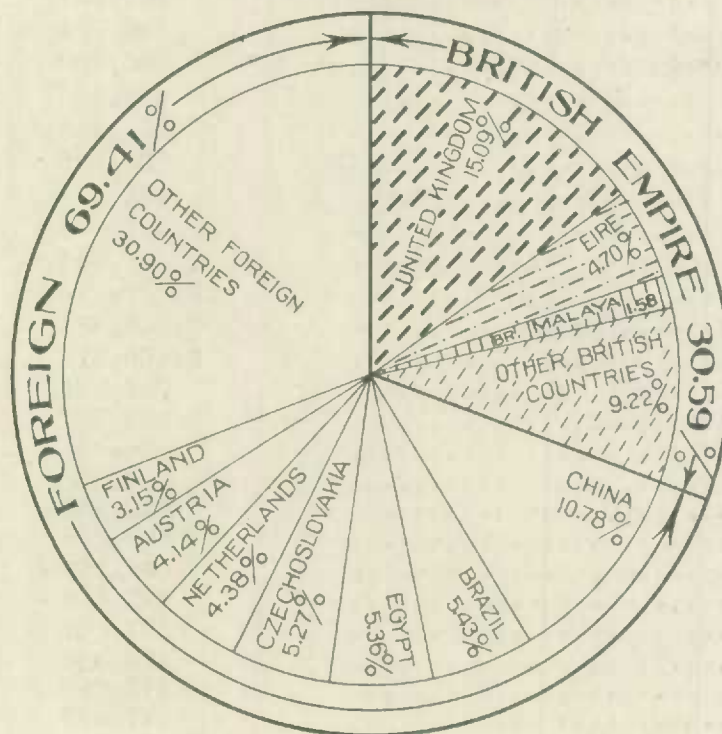
GROSS EXPORTS

WORLD 40,795,631 BARRELS



GROSS IMPORTS

WORLD 39,375,984 BARRELS



Quantities and Percentages Used in Wheat Flour Charts

Gross Exports

Five-Year Average 1931 to 1935

	<u>Barrels</u>	<u>Per Cent</u>
Total World Exports	32,989,890	100.00
British Empire Exports	14,891,359	45.14
Australia	6,310,612	19.13
Canada	5,266,878	15.97
United Kingdom	1,998,562	6.06
Hong Kong	889,117	2.69
British India	255,219	.77
Other British Countries	170,971	.52
Foreign Exports	18,098,531	54.86
United States	5,962,505	18.07
Japan	3,423,674	10.38
France	2,389,029	7.24
Italy	1,719,295	5.21
Argentina	994,310	3.01
Germany	890,084	2.70
Hungary	754,320	2.29
Other Foreign Countries	1,965,314	5.96

Gross Imports

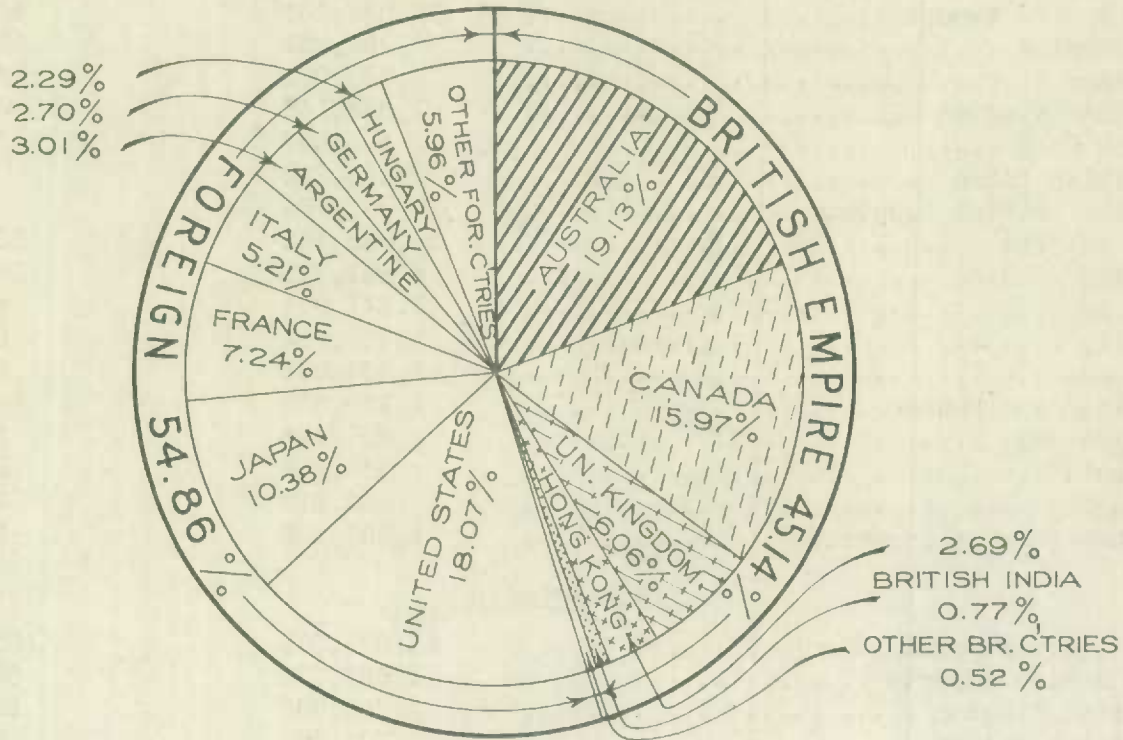
Total World Imports	30,682,365	100.00
British Empire Imports	11,397,249	37.15
United Kingdom	5,319,789	17.34
Hong Kong	994,017	3.24
Eire	976,380	3.18
British Malaya	594,912	1.94
Newfoundland	417,147	1.36
Jamaica	393,661	1.28
Trinidad and Tobago	330,537	1.08
Palestine	275,308	.90
Cyprus	231,756	.75
Ceylon	202,376	.66
Anglo Egyptian Sudan	186,358	.61
British Guiana	177,675	.58
Other British Countries	1,297,333	4.23
Foreign Imports	19,285,116	62.85
Manchoukuo	3,918,523	12.77
China	2,256,616	7.35
Cuba	911,186	2.97
Dutch East Indies	859,287	2.80
Philippines	806,781	2.63
Austria	623,460	2.03
Netherlands	610,142	1.99
Finland	605,373	1.97
Brazil	582,719	1.90
Norway	571,808	1.86
Egypt	502,363	1.64
Chosen	419,442	1.37
Denmark	413,098	1.35
France	411,478	1.34
Other Foreign Countries	5,792,840	18.88

WHEAT FLOUR

FIVE-YEAR AVERAGE 1931-1935

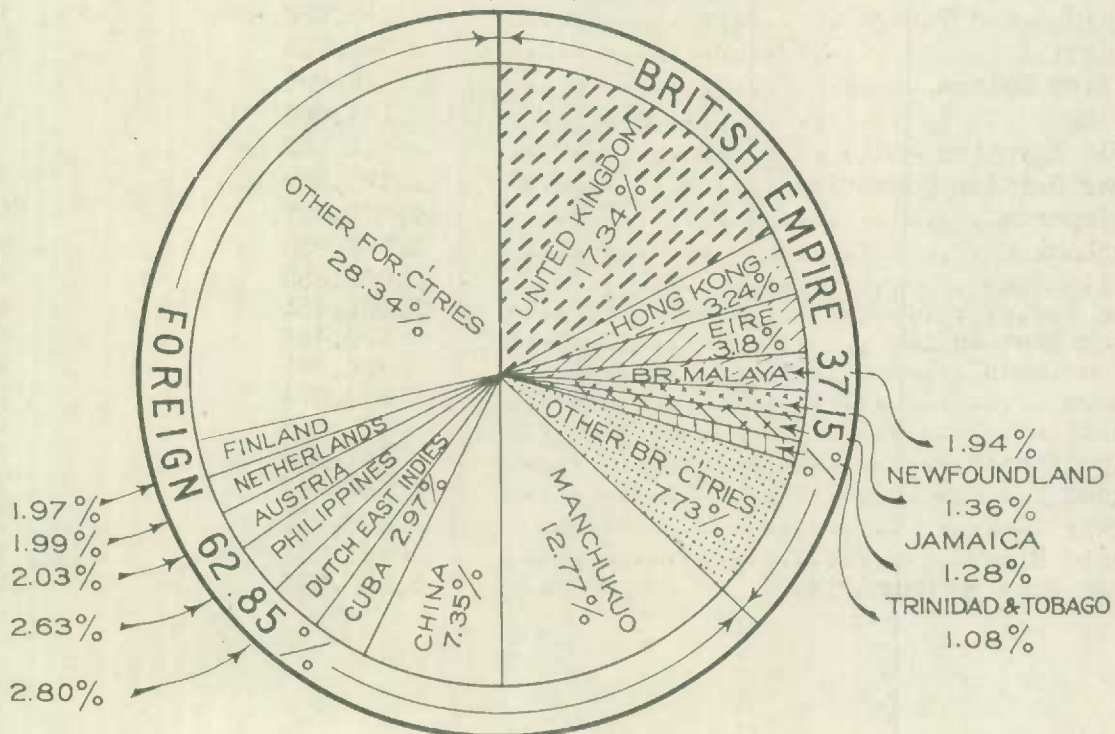
GROSS EXPORTS

WORLD - 32,989,890 BBL.



GROSS IMPORTS

WORLD - 30,682,365 BBL.



Quantities and Percentages Used in Wheat Flour Charts

Gross Exports

Calendar Year 1936

	<u>Barrels</u>	<u>Per Cent</u>
Total World Exports	27,522,526	100.00
British Empire Exports	12,884,361	46.81
Australia	5,705,261	20.73
Canada	4,850,068	17.62
United Kingdom	1,344,148	4.88
Hong Kong	563,867	2.05
British India	203,253	.74
Other British Countries	217,764	.79
Foreign Exports	14,638,165	53.19
United States	4,291,713	15.59
Japan	2,241,971	8.15
Italy	1,706,112	6.20
France	1,494,985	5.43
Poland and Danzig	1,158,329	4.21
Argentina	897,373	3.26
Russia	630,906	2.29
Hungary	609,310	2.22
Other Foreign Countries	1,607,466	5.84

Gross Imports

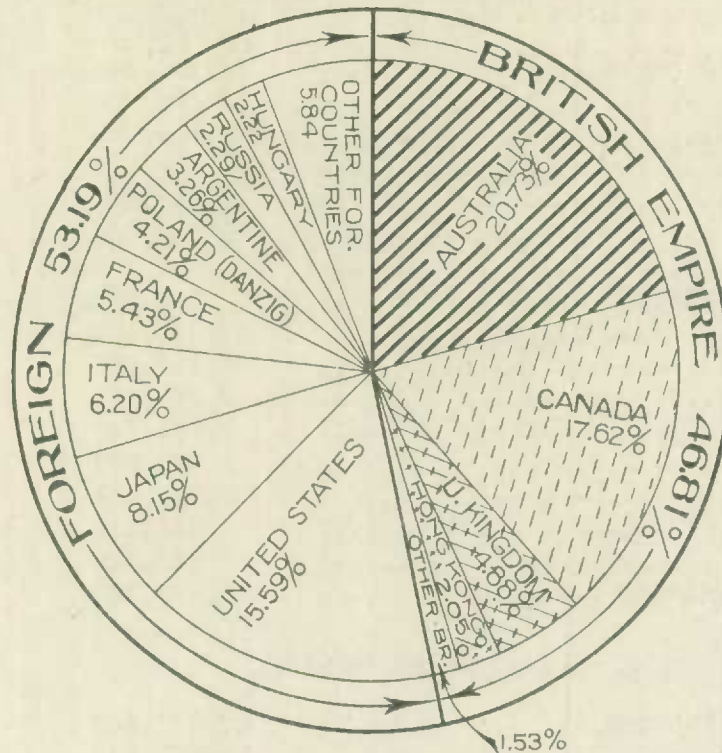
Total World Imports	24,071,385	100.00
British Empire Imports	9,607,678	39.91
United Kingdom	4,780,892	19.86
British Malaya	703,569	2.92
Hong Kong	656,102	2.73
Jamaica	427,765	1.78
Newfoundland	422,141	1.75
Trinidad and Tobago	352,853	1.47
Palestine	344,529	1.43
British Guiana	173,896	.72
Ceylon	164,560	.68
Anglo Egyptian Sudan	152,862	.64
Other British Countries	1,428,509	5.93
Foreign Imports	14,463,707	60.09
Manchoukuo	2,367,950	9.84
Philippines	1,030,888	4.28
Cuba	1,002,431	4.16
Dutch East Indies	803,452	3.34
Netherlands	704,581	2.93
France	599,074	2.49
Brazil	571,516	2.37
Tripolitania	567,017	2.36
Chosen	462,747	1.92
Norway	438,901	1.82
Puerto Rico	425,066	1.77
Other Foreign Countries	5,490,084	22.81

WHEAT FLOUR

CALENDAR YEAR 1936

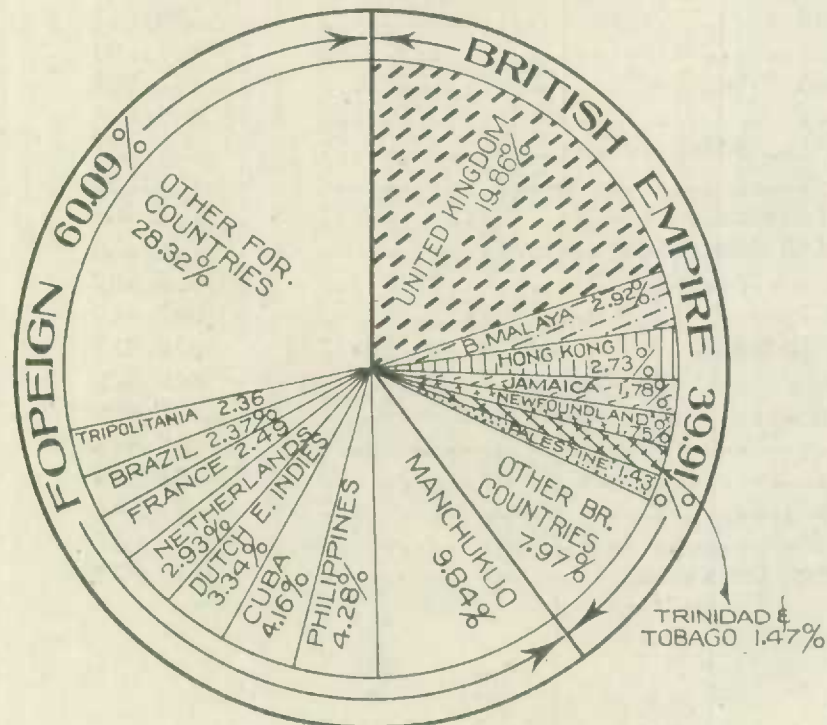
GROSS EXPORTS

WORLD 27,522,526 BARRELS



GROSS IMPORTS

WORLD 24,071,385 BARRELS



Quantities and Percentages Used in Wheat Flour Charts

Gross Exports

Calendar Year 1937

	<u>Barrels</u>	<u>Per Cent</u>
Total World Exports	27,115,344	100.00
British Empire Exports	12,194,064	44.97
Australia	5,796,258	21.38
Canada	4,086,997	15.07
United Kingdom	891,637	3.29
British India	629,556	2.32
Hong Kong	547,333	2.02
Other British Countries	242,283	.89
Foreign Countries	14,921,280	55.03
United States	5,115,861	18.87
Japan	2,367,163	8.73
Italy	1,871,346	6.90
France	1,304,667	4.81
Argentina	1,070,319	3.95
Hungary	649,915	2.40
Russia	643,729	2.37
Other Foreign Countries	1,897,780	7.00

Gross Imports

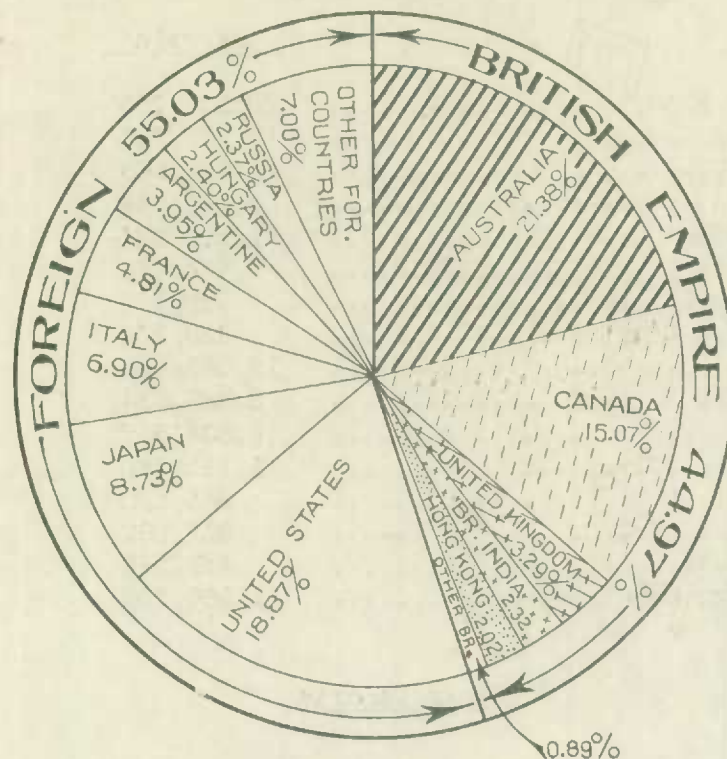
Total World Imports	20,630,363	100.00
British Empire Imports	10,107,542	48.99
United Kingdom	4,879,988	23.65
Hong Kong	777,244	3.77
British Malaya	776,906	3.76
Newfoundland	450,149	2.18
Jamaica	367,138	1.78
Trinidad and Tobago	341,267	1.65
Palestine	307,298	1.49
Anglo Egyptian Sudan	207,977	1.01
Cyprus	183,232	.89
British Guiana	174,908	.85
Other British Countries	1,641,435	7.96
Foreign Imports	10,522,821	51.01
Manchoukuo	882,413	4.28
Dutch East Indies	862,617	4.18
Philippines	846,369	4.10
Netherlands	727,865	3.53
Germany	543,846	2.64
Brazil	464,659	2.25
Puerto Rico	432,264	2.10
France	412,355	2.00
Other Foreign Countries	5,349,933	25.93

WHEAT FLOUR

CALENDAR YEAR 1937

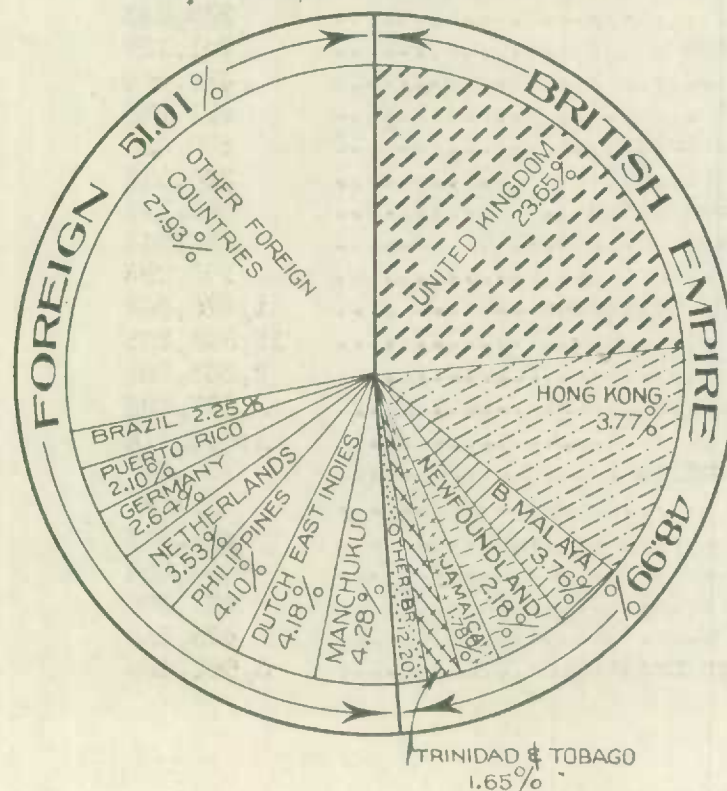
GROSS EXPORTS

WORLD 27,115,344 BARRELS



GROSS IMPORTS

WORLD 20,630,363 BARRELS



Quantities and Percentages Used in Wheat Flour Charts

Gross Exports

Calendar Year 1938

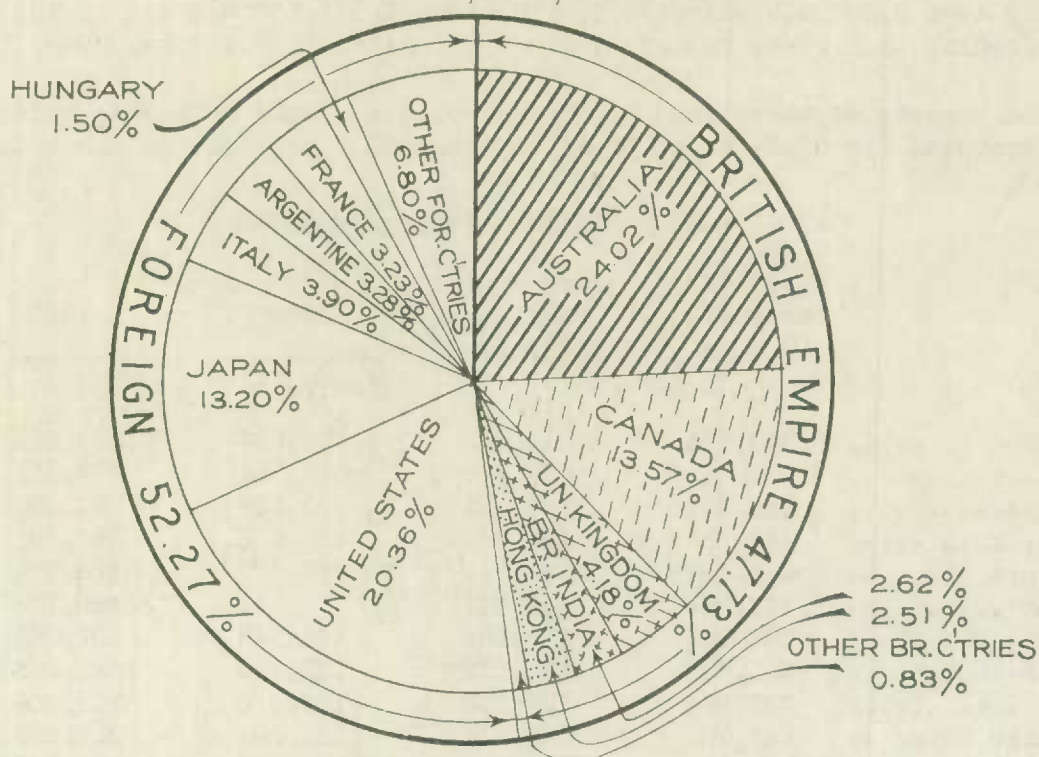
	<u>Barrels</u>	<u>Per Cent</u>
Total World Exports	28,825,730	100.00
British Empire Exports	13,757,326	47.73
Australia	6,924,668	24.02
Canada	3,911,864	13.57
United Kingdom	1,203,997	4.18
British India	754,635	2.62
Hong Kong	723,928	2.51
Other British Countries	238,234	.83
Foreign Countries	15,068,404	52.27
United States	5,869,034	20.36
Japan	3,804,557	13.20
Italy	1,125,260	3.90
Argentina	945,290	3.28
France	932,692	3.23
Hungary	431,365	1.50
Other Foreign Countries	1,960,206	6.80

Gross Imports

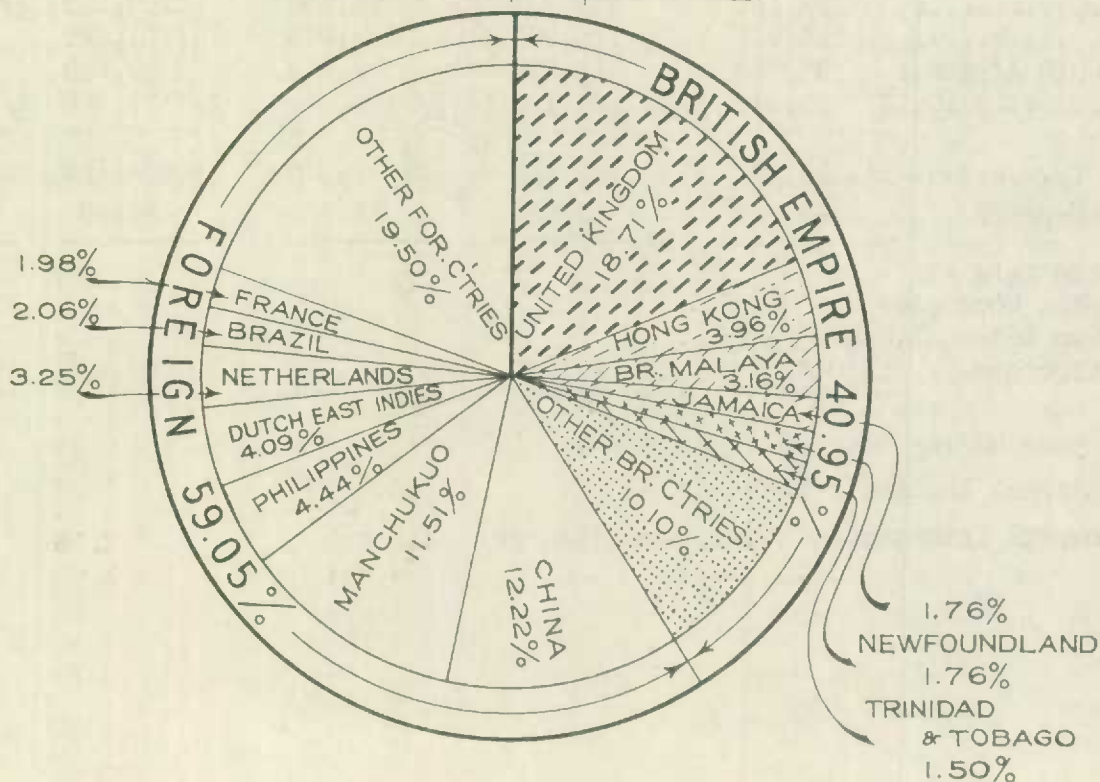
Total World Imports	23,443,853	100.00
British Empire Imports	9,600,028	40.95
United Kingdom	4,387,321	18.71
Hong Kong	928,643	3.96
British Malaya	741,137	3.16
Jamaica	413,593	1.76
Newfoundland	412,130	1.76
Trinidad and Tobago	350,328	1.50
Palestine	220,013	.94
Anglo Egyptian Sudan	195,155	.83
British Guiana	186,044	.79
Ceylon	179,295	.77
Other British Countries	1,585,869	6.77
Foreign Imports	13,843,825	59.05
China	2,865,791	12.22
Manchoukuo	2,697,294	11.51
Philippines	1,040,112	4.44
Dutch East Indies	959,913	4.09
Netherlands	761,721	3.25
Brazil	483,443	2.06
France	464,884	1.98
Norway	461,060	1.97
Puerto Rico	428,553	1.83
Other Foreign Countries	3,681,054	15.70

WHEAT FLOUR CALENDAR YEAR 1938

GROSS EXPORTS
WORLD - 28,825,730 BBL.



GROSS IMPORTS
WORLD - 23,443,853 BBL.



SUMMARY

In the table below, it will be noted that the average wheat flour imports into British Empire Countries during the five years 1926 to 1930 amounted to 12,045,370 barrels and the average for the period from 1931 to 1935 was 11,397,249 barrels, while for 1936 they were 9,607,678 barrels, in 1937 10,107,542 barrels and in 1938 9,600,028 barrels, according to figures issued by the International Institute, Rome, Italy.

The imports as taken from the Trade Returns of the following British Empire Countries accounted for 92.2; 92.9; 91.3; 89.3 and 90.1 per cent of the total importations.

Imports into British Empire Countries

Countries	Five-Year Average 1926-30	Five-Year Average 1931-35	1936 (Barrels)	1937	1938
United Kingdom	5,940,634	5,319,842	4,780,874	4,880,034	4,387,372
Hong Kong	-	993,770	655,953	777,012	926,345
Eire	1,850,951	976,402	79,662	67,055	57,849
Jamaica	345,786	393,561	427,776	367,091	413,631
British Malaya	622,457	594,915	703,577	776,954	741,139
Newfoundland	372,536	<u>1/</u> 410,981	<u>1/</u> 422,143	<u>1/</u> 450,108	<u>1/</u> 412,146
Palestine	227,505	275,298	344,524	307,261	<u>2/</u> 220,013
Trinidad and Tobago ...	301,306	330,628	352,799	341,255	350,920
Ceylon	223,566	202,298	164,570	163,609	179,341
Anglo Egyptian Sudan ..	143,751	189,330	155,291	211,269	199,966
British Guiana	170,316	177,650	173,929	174,947	186,250
Mauritius	105,122	118,552	91,143	111,458	<u>2/</u> 104,270
New Zealand	142,914	120,731	77,593	3,749	376
Cyprus	152,192	231,753	96,654	183,219	<u>3/</u> 193,273
Malta	126,945	130,966	114,076	101,347	136,748
Union of South Africa..	285,754	13,858	7,864	4,549	5,847
Aden	<u>2/</u> 99,447	<u>2/</u> 107,149	<u>2/</u> 123,842	<u>2/</u> 113,268	<u>2/</u> 140,039
Total	11,111,182	10,587,684	8,772,270	9,034,185	8,655,525
% of Total Imports	92.24	92.90	91.30	89.38	90.16
Total Imports into all British Empire Countries as taken from International Institute figures	12,045,370	11,397,249	9,607,678	10,107,542	9,600,028

1/ Fiscal year ending June 30.

2/ International Institute figures.

3/ Not shown in International Institute figures.

During the five-year period 1926-30, the average wheat flour imports into foreign countries amounted to 27,330,614 barrels and the average for the period from 1931-35 was 19,285,116 barrels, while for 1936, they were 14,463,707 barrels, 1937, 10,522,821 barrels and for 1938, 13,843,825 barrels, according to figures issued by the International Institute, Rome, Italy.

According to the above amounts imported 87.7; 64.9; 82.5; 83.3 and 93.3 per cent of the total importation were accounted for by the imports into the thirty foreign countries, as shown in the following statement:-

Countries	Five-Year Average 1926-30	Five-Year Average 1931-35	1936	1937	1938
			(Barrels)		
China	4,248,034	2,286,681	348,792	341,793	2,865,772
Philippines	806,510	806,805	1,030,944	846,842	1,040,112
Netherlands	1,723,723	610,136	704,591	727,827	761,695
Netherlands East Indies ..	797,896	859,302	803,439	862,609	959,840
Finland	1,177,753	564,528	293,915	234,559	336,539
Austria	1,632,218	623,446	300,058	226,438	171,897
Norway	758,416	575,577	438,935	360,805	461,060
Brazil	2,136,775	582,748	571,550	464,625	483,466
Cuba	1/1,224,942	911,093	1,002,462	-	-
Egypt	2,142,383	502,082	34,566	26,282	40,866
Czechoslovakia	2,077,466	179,226	12,087	2,457	6,119
Puerto Rico	1/419,124	1/389,972	1/425,066	1/432,264	1/428,553
Denmark	766,622	416,761	94,783	95,123	223,117
Chosen	386,487	1/419,442	1/462,747	1/299,087	1/233,227
Venezuela	293,519	243,188	238,572	279,065	-
Guatemala	1/174,674	1/146,001	1/89,310	1/98,083	1/108,544
Haiti	321,856	176,900	133,785	119,061	86,160
Hawaii	1/137,975	1/148,003	1/144,538	1/180,082	1/161,185
French Indo-China	1/242,298	189,598	207,837	213,714	272,291
Germany	611,997	61,572	6,413	543,791	384,283
Greece	697,095	21,731	9,426	9,133	14,611
Bolivia	1/252,150	1/51,651	1/55,903	1/81,549	1/113,493
Syria & Lebanon	1/330,825	1/238,145	1/48,929	1/63,327	1/48,929
Senegal	1/103,499	1/117,700	1/143,413	1/169,959	1/117,093
Formosa	1/189,358	1/239,382	1/318,096	1/257,581	1/309,773
Tunisia	1/14,557	1/41,506	1/56,353	1/81,549	1/86,048
(Tripolitania	1/124,102	1/315,622	1/567,017	1/304,261	-
Libya (Cyrenaica	-	1/243,701	1/264,105	1/156,911	-
Manchoukuo	(Not available)	1/2,367,950	1/882,413	1/2,697,294	-
Italian Aegean Islands ...	-	1/146,833	1/137,902	-	-
France	200,921	411,116	599,199	412,310	464,928
Total	23,993,175	12,520,458	11,912,683	8,773,491	12,926,895
% of Total Imports	87.79	64.92	82.36	83.38	93.38
Total Imports into all Foreign Countries according to International Institute figures	27,330,614	19,285,116	14,463,707	10,522,821	13,843,825

1/ International Institute figures are used because the imports of wheat flour are not shown in trade returns of the various countries over a period of years and some of these trade returns are not available.

Part III.

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Imports by countries of origin

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The United Kingdom x

The repeal of the Corn Laws in 1846 permitted free importations of grain into the British Isles. In 1932, however, two very important regulatory measures became effective. These were the Wheat Act and the Ottawa Agreements Act.

The Wheat Act became law May 12, 1932, and guaranteed to producers a minimum price of 10 shillings per 112 pounds (about \$1.30 per bushel at par) and imposed upon millers and importers of flour the obligation of making quota payments into a special fund for maintaining the price guaranty. The guaranteed minimum price began with the 1932 crop, applied only to millable wheat and was limited to 50,400,000 bushels. On June 17, an order became effective requiring every miller and exporter of flour to make to the Commission set up to administer the Wheat Act, a quota payment of 2s.3d. per sack of 280 pounds. This amount has been changed several times, and on October 1, 1939 was set at 3s.6d. per sack of 280 pounds.

The Ottawa Agreements went into effect in November, 1932 and placed a duty of 2 shillings per quarter of 480 pounds (about 6 cents per bushel) on imported non-Empire wheat. This duty on non-Empire wheat was removed on January 1, 1939 to implement the United Kingdom-United States Trade Agreement. A 10 per cent ad valorem duty imposed on non-Empire wheat flour by the Import Duties Act of 1932 remains in force.

British Mills

The milling industry in the United Kingdom has been rationalized under the control of the Millers' Mutual Association with the avowed purpose of reducing costs of flour manufacture and distribution. At its inception this organization accounted for 90 per cent of the country's total milling capacity exclusive of the Co-operative Wholesale Society. In 1930 the latter was milling approximately 22½ per cent of all grain, imported and home-grown, for the British market. The next largest millers were Josephy Rank Ltd., and Spillers Ltd., each accounting for almost 20 per cent of all the milling activity, and fourth in importance was the Associated London Flour Millers Ltd., which supplied 5 per cent of the total. These four practically control British milling operations. Most of the small concerns which compose the remaining 32½ per cent are members of the Mutual Association, and the Co-operative apparently does not conflict with it. This concentration of the flour milling industry has given it considerable bargaining advantage and has been an important factor in the world wheat-demand situation.

One of the methods under the above scheme was to close up all superfluous mills. These were secured by placing a levy on individual members of the organization. The elimination of these mills permitted the remaining ones to operate on a fuller time basis and consequently on a cheaper unit cost of production. It is claimed that no attempt was made to fix flour prices but the abolition of overlapping sales territories and other uneconomic trade practices had the effect of reducing price competition. An agreement was entered into whereby a number of mills would not buy ~~any~~ foreign flour, which tended to reduce the importation of high-strength flours, which, in former years, some mills bought for blending with their own product.

There were no agreements under the rationalization plan regarding the purchase of foreign wheat, but maybe the operation of the scheme engendered a spirit of cooperation in that direction, which probably lessened competition among members in that connection. At any rate it has resulted in a sounder financial basis for the milling industry.

x Summarized from Shollenberger's "Wheat Requirements in Europe" (United States Department of Agriculture, Technical Bulletin No. 535 - 1936).

The commercial mills are of a modern roller-system type and the greater part of the milling is done in plants of 1,000 or more barrels capacity per 24 hours. As the mills in the United Kingdom depend largely on foreign wheat for their supplies, nearly all of them are located at a port or on a waterway connected with a port. The principal milling centres in order of their importance are Liverpool (including near-by Mersey-side towns), London, Hull, Cardiff, Edinburgh, Glasgow, Bristol, Newcastle and Belfast. Until a few years ago, Manchester also was an important milling centre. In 1930, port mills made 70.3 per cent of the flour milled.

The equipment and methods of operation in the British mills are quite up-to-date, as some of the mills are fairly new and most of the others are in good repair. The grinding capacity is more than sufficient for domestic requirements but grain storage is generally limited to only a few days' supply. Further stocks are carried in port elevators, warehouses and barges.

British millers employ an elaborate system in preparing grain for milling. It is given a rough cleaning before binning and to drier types a small quantity of water is added. Usually the different kinds of wheat are binned separately but sometimes those requiring similar conditioning are mixed in convenient proportions beforehand. Just prior to milling, the wheats to be included in the mixture are given a thorough cleaning by means of washers, stoners, scourers, screening machines and aspirators, and cockle, oat and spiral separators. The washing of the wheat is one of the last steps in the cleaning process and usually the first in the conditioning and tempering. This latter process may include drying, heating, further dampening, and storing. One of its important functions is to control moisture content of the grain at time of grinding. The wheat usually goes to first break in a British mill with a moisture content of 16 or 17 and sometimes as high as 18 per cent. The flour produced usually contains between 15 and 16 per cent moisture.

There are four general classes of flour in the mills: bread flour, cake and pastry flour, biscuit flour and household flour, the latter either plain or of the self-raising variety. The bread flour is produced from a mixture of foreign wheats of medium to strong gluten quality, biscuit flour almost wholly from English wheats and household and cake flours generally from soft wheats, either foreign or domestic.

British millers buy their wheat principally in London, while Liverpool is preeminent in grain futures markets and is also an important cargo market. The large number of different kinds and qualities available make it possible to vary the combination used and as this is often necessitated by circumstances, the blending of wheats is a highly developed skill among these flour manufacturers. This enables them to take advantage of price differences in wheats to which millers in other countries cannot give consideration.

In England and Wales, United States hard winter wheats practically fulfil the bread flour requirements and during the past few years a large quantity has been used by the millers. These are employed only as fillers, however. Other filler wheats are Argentine and medium-strength Russian wheats. Strong wheats include Canadian Manitoba and the better quality hard wheats from the Union of Soviet Socialist Republics and the United States. Weak wheats are English, western and central European, Danubian, Indian and Australian. Durum wheat is sometimes used but not in great quantities.

Stronger wheats are used for bread flours in Scotland than in England. Practically all Canadian or strong United States wheats are chosen. In the production of cake and pastry flour, soft red winter wheats from the United States were formerly used, but in recent years Australian and continental European grains have replaced them.

The approximate proportions of foreign wheats milled in British mills in 1930 were as follows:

Canadian	22.7
United States	18.2
Russian	16.4
Argentine	13.2
Australian	11.0
English	9.1
Indian	2.9
Other wheat	6.5
Total	<u>100.0</u>

The United Kingdom is at present the largest importer of wheat and wheat flour in the world. With a population of 50,100,000 and a per capita consumption (less seed requirements) estimated at 5.3 bushels of wheat, the 1937 amount required was calculated at 288,000,000 bushels, according to Broomhall's 1938 Corn Trade Year Book.

The volume of wheat flour imported was well maintained from 1926 to 1931. The year following, the Wheat Act and the Ottawa Agreements caused some falling off. During the five years 1926-30, the average imports were 5,940,634 barrels, of which 3,551,343 came from British Empire countries and 2,389,291 from foreign. Canada and Australia were the largest contributors among the former, the United States and Argentina chief of the latter. During the next period (1931-35) the imports showed a slight reduction of 5,319,842 barrels but the amounts from Empire countries were increased, notably those from Australia.

Imports from foreign countries declined to 1,596,884 barrels in the second five-year period (1931-35), with France, the United States, Argentina, Italy and Germany the leading contributors. The two that led in the former period showed decreases while the others were increased. Although the imports in each of the years after 1935 were less than the five-year average, those from British Empire countries maintained an increasingly favourable percentage relationship to the totals. The amounts from Canada continued without great variation at well over two million barrels and Australia's contributions expanded materially. The quantities drawn from foreign countries display considerable fluctuation, and the last year for which figures are available shows only the United States, Argentina and France exporting, except for very minor contributions from various other countries.

The Wheat Commission lists 536 flour mills in Great Britain and the British Board of Trade has issued figures on the census of the milling industry for 1935, which, however, does not include mills employing less than 10 persons. In 1924 such establishments had an output of about 445,000 barrels and, in addition, mills in Northern Ireland produced about 697,000 barrels. These were not included in the 1930 figures. Disappearance of flour in Great Britain was about as follows, in thousand barrels:-

	<u>1935</u>	<u>1930</u>	<u>1924</u>
Domestic output	46,206	43,738	47,899
Less exports	<u>1,486</u>	<u>2,384</u>	<u>3,781</u>
	44,720	41,354	44,118
Plus imports	<u>4,560</u>	<u>6,955</u>	<u>6,317</u>
Disappearance	<u>49,280</u>	<u>48,309</u>	<u>50,435</u>

This apparent decrease in flour consumption may have been due to changes in stocks carried over in the different years, but when it is remembered that Great Britain's population increased, it seems probable that per capita flour consumption has declined since 1924.

No figures have been issued showing the present capacity of British mills, but it is probable that the total lies somewhere between 185 and 200 thousand barrels per day.

United Kingdom Tariff on Wheat Flour

	British Preferential <u>Tariff</u>	General <u>Tariff</u>
Wheat flour, not being specifically provided for in the tariff of the United Kingdom, is classified as "unenumerated goods", on which the rates are	Free	10% ad val.

The British Preferential tariff is accorded to wheat flour shown to be a Canadian or British Empire product within the meaning of Imperial preference regulations requiring (1) consignment direct to the United Kingdom from a part of the British Empire and (2) production to the Customs of a certificate of origin known as Form No. 120, to be given by the manufacturer, declaring the flour to have an Empire content of at least 25 per cent. As from August 1, 1939, all certificates of origin will be required to be endorsed to the effect, where the facts justify it, that the flour is milled wholly from Empire wheat or from a blend of wheat of which not less than 25 per cent is of Empire growth. Unless this endorsement is given, full costings in the approved form, as provided for in the Imperial Preference Regulations, will be required before the claim to Preference can be considered.

The General tariff applies to products of all countries outside the British Empire. It would also apply to goods which, although imported from Empire countries, do not fulfil Imperial preference conditions.

Quota Payments

Under the United Kingdom Wheat Acts, 1932 and 1939, a "quota payment" must be made to the Wheat Commission in respect of each cwt. (112 lbs.) of wheat flour imported into or milled in the United Kingdom, the proceeds being used to reimburse United Kingdom wheat growers to the extent of the difference between the ascertained average price for certified sales of home-grown millable wheat received by them in any cereal year and the standard price of 10s. per cwt. fixed by the Act. Quota payments vary from time to time depending on various factors. Since October 1, 1939 the "quota payment" on flour has been 16.8 pence per cwt. The levy is the same whether the flour is an Empire or non-Empire product.

United Kingdom

<u>Calendar Year</u>	<u>Total Imports</u>	<u>British Empire Imports</u>	<u>Canada</u>	<u>Australia</u>	<u>Irish Free State</u>	<u>Other British Countries</u>
			(Barrels)			
1926	6,092,048	3,848,922	3,076,919	737,165	34,109	729
1927	6,263,381	3,991,532	2,930,909	1,015,152	41,459	4,012
1928	5,101,056	3,387,574	2,788,309	560,324	38,477	464
1929	5,544,331	2,939,653	2,127,983	761,394	50,269	7
1930	6,701,853	3,589,033	2,564,792	976,932	-	47,309
5-year average	5,940,634	3,551,343	2,697,783	810,193	32,863	10,504
1931	6,141,198	3,712,827	2,225,493	1,461,907	-	25,427
1932	4,874,022	3,898,377	2,270,902	1,618,071	-	9,404
1933	5,624,774	4,038,338	2,470,306	1,561,863	-	6,169
1934	5,398,370	3,516,763	2,415,103	1,101,101	-	559
1935	4,560,844	3,448,485	2,414,626	1,031,805	-	2,054
5-year average	5,319,842	3,722,958	2,359,286	1,354,949	-	8,723
1936	4,780,874	3,758,583	2,345,137	1,411,177	-	2,269
1937	4,880,034	4,222,835	2,310,772	1,893,480	-	18,583
1938	4,337,372	3,765,887	2,087,707	1,674,855	-	3,325

<u>Calendar Year</u>	<u>Foreign Imports</u>	<u>United States</u>	<u>Argentina</u>	<u>France</u>	<u>Germany</u>
			(Barrels)		
1926	2,243,126	1,561,574	453,401	84,217	66,666
1927	2,271,849	1,666,130	463,037	39,831	21,669
1928	1,713,482	1,093,536	468,981	61,811	13,495
1929	2,605,178	1,449,427	433,588	330,053	157,922
1930	3,112,821	1,814,717	335,273	676,630	85,871
5-year average	2,389,291	1,517,077	430,856	238,508	69,125
1931	2,423,371	1,187,191	409,787	578,833	23,625
1932	975,645	263,998	273,208	251,473	7,533
1933	1,586,436	67,935	207,623	798,311	39,687
1934	1,881,607	73,510	140,647	734,511	585,114
1935	1,112,359	51,159	115,686	507,337	95,471
5-year average	1,596,884	328,759	229,390	574,093	150,886
1936	1,022,291	44,335	155,648	417,487	257,576
1937	657,199	61,490	234,240	231,013	2,918
1938	621,485	225,711	222,465	103,025	-

<u>Calendar Year</u>	<u>Italy</u>	<u>Hungary</u>	<u>Belgium</u>	<u>Netherlands</u>	<u>Other Foreign Countries</u>
			(Barrels)		
1926	11,767	3,606	4,649	38,345	18,091
1927	20,080	4,623	3,981	22,052	30,446
1928	29,222	4,266	8,075	10,043	24,053
1929	43,739	97,925	2,050	68,254	22,220
1930	16,253	42,635	25,361	48,822	67,258
5-year average	24,212	30,611	8,823	37,503	32,576
1931	54,235	38,432	74,366	21,193	37,709
1932	98,453	4,115	42,149	8,420	26,296
1933	335,489	8,483	123,035	3,255	2,618
1934	235,080	12,266	68,946	26,766	4,767
1935	241,286	31,463	17,974	6,949	45,034
5-year average	192,908	18,952	65,294	13,317	23,285
1936	-	15,436	25,239	2,078	104,492
1937	560	31,077	22,670	2,401	70,830
1938	-	-	-	-	70,284

United Kingdom

United Kingdom trade returns show Canadian wheat flour exported via United States ports as imported from the United States and United States wheat flour routed through Canadian ports as coming from Canada. The following table shows the various figures adjusted according to the best method available, which is detailed below:-

<u>Calendar Year</u>	<u>British Empire Imports</u>	<u>Canada (Barrels)</u>	<u>Foreign Imports</u>	<u>United States</u>
1926	3,971,383	3,199,380	2,120,665	1,439,113
1927	4,219,224	3,158,601	2,044,157	1,438,438
1928	3,608,396	3,009,131	1,492,660	872,714
1929	3,071,837	2,260,167	2,472,994	1,317,243
1930	3,867,808	2,843,567	2,834,045	1,535,942
5-year average	3,747,730	2,894,169	2,192,904	1,320,690
1931	3,749,134	2,261,800	2,392,064	1,150,884
1932	3,923,403	2,295,928	950,619	238,972
1933	4,036,637	2,468,605	1,588,137	69,636
1934	3,524,420	2,422,760	1,873,950	65,853
1935	3,447,500	2,413,641	1,113,344	62,144
5-year average	3,736,219	2,372,547	1,583,623	315,498
1936	3,762,439	2,348,993	1,018,435	40,479
1937	4,193,851	2,281,788	686,183	90,474
1938	3,816,772	2,138,592	570,600	174,826

The method of adjustment was as follows, taking 1938 as a specimen year:-

	<u>Barrels</u>
Imports into United Kingdom of wheat flour from the United States	225,711
United States exports of wheat flour to the United Kingdom	<u>174,826</u>
Excess United Kingdom imports of wheat flour over United States imports to the United Kingdom represents Canadian flour shipped to the United Kingdom via the United States	<u>50,885</u>
Imports of wheat flour into the United Kingdom from Canada.	2,087,707
Adjusted figures:- United Kingdom imports from Canada plus excess of United Kingdom imports of flour over United States imports to the United Kingdom	<u>2,138,592</u>
Deduct 50,885 barrels from the total imports into the United Kingdom from United States	<u>174,826</u>
Add 50,885 barrels to the total amount imported into the United Kingdom from British Empire Countries	3,816,772
(3,765,887 + 50,885)	
Deduct 50,885 barrels from the total amount imported into the United Kingdom from United States (621,485 - 50,885).	570,600

IRISH FREE STATE (EIRE)

The average importation of wheat flour into Eire was 1,850,951 barrels for the five-year period 1926-30 and receded to 976,402 barrels during the next five years due to the sharp falling off after 1932. Each subsequent year for that period showed more than a 50 per cent decline and the years 1936 to 1938 show still further decreases. The first average was composed largely of British Empire imports (94 per cent), the second was 93 per cent Empire-produced, and since then no foreign wheat flour has been received into the Irish Free State.

The reason for the large decrease in imports is that strenuous efforts are being put forth in Eire to grow more wheat and make the country self-supporting in the matter of cereals. The importation of wheat flour into the Free State is totally prohibited except under licence of the Minister of Industry and Commerce. In practice, these licenses are granted only to biscuit manufacturers, who maintain that they require a certain type of flour containing no admixture of native wheat; government regulations are such that a certain percentage of home-grown wheat must be added to imported wheat milled in Eire.

Flour Milling

Legislation was enacted July 6, 1932 to stimulate the expansion of the milling industry to a point sufficient to take care of domestic needs. One form of encouragement given was the placing of a duty of 5 shillings per sack of 280 pounds on imports of flour. The Agricultural Produce Act which followed in 1933 abolished this but prohibited the importation of flour except by licence.

The normal annual consumption of wheat flour in the Irish Free State is estimated at 4,250,000 barrels. Prior to 1932 about 44 per cent of this was imported but governmental protection and assistance have contrived to reduce foreign requirements to less than $1\frac{1}{2}$ per cent, and it is expected that in the course of another year or so Irish millers will be able to fulfil all domestic needs. In accordance with the latest order for the current cereal year 24 per cent of the total wheat milled in Eire must be home-grown and it is expected that this percentage will be raised to 35 or more within a short time.

The chief milling centres are Dublin, Cork and Limerick, but there were about 105 mills in the Free State in 1929 with an output valued at 5,000 pounds or more. Most of the mills are located near ports. An idea of the distribution and capacities of a few is given in the following:-

Dublin	7	mills with total capacity	4,425	barrels per day.
Cork	7	" " " "	3,087	" " "
Limerick	4	" " " "	2,950	" " "
Waterford	9	" " " "	2,366	" " "
Midlands	5	" " " "	1,887	" " "
Connaught)	4	" " " "	1,372	" " "
Donegal)				
TOTAL	36	" " " "	16,087	" " "

Ireland, like Scotland, prefers the stronger wheat to make bread flours. In the rural districts and villages of Ireland a great deal of bread is baked in the home. For this purpose a soft weak flour made from white wheat is required. Formerly, white wheat of the softer types from the Pacific coast were preferred, but in recent years these have been replaced by Australian white wheats. One of the chief reasons that white wheat is preferred to soft red wheat is that Irish feeders are willing to pay a higher price for the offals from white wheat.

IRISH FREE STATE

According to Irish Free State annual trade returns the sources of wheat flour imports were:-

<u>Calendar Year</u>	<u>Total Imports</u>	<u>British Empire Imports</u>	<u>Great Britain</u> (Barrels)	<u>Northern Ireland</u>	<u>Canada</u>	<u>Australia</u>
1926	1,826,436	1,713,905	1,251,911	228,165	233,829	-
1927	1,931,990	1,799,134	1,291,524	216,032	291,578	-
1928	1,814,125	1,739,239	1,291,571	195,642	252,026	-
1929	1,778,609	1,683,282	1,323,108	184,105	176,069	-
1930	1,903,597	1,758,632	1,331,077	200,328	227,227	-
5-year average..	1,850,951	1,738,838	1,297,838	204,854	236,146	-
1931	1,929,768	1,771,858	1,347,764	182,725	241,369	-
1932	1,694,243	1,629,580	1,213,141	143,715	271,581	1,143
1933	792,360	711,979	205,000	67,447	427,602	11,930
1934	334,881	322,675	68,342	17,993	232,774	3,556
1935	130,258	130,115	66,559	3,025	58,531	2,000
5-year average..	976,402	913,241	580,161	82,981	246,371	3,728
1936	79,662	79,662	67,800	-	10,540	1,322
1937	67,055	67,055	58,554	-	6,679	1,822
1938	57,849					

Individual quantities not yet available

<u>Calendar Year</u>	<u>Foreign Imports</u>	<u>United States</u>	<u>Germany</u> (Barrels)	<u>Hungary</u>	<u>France</u>	<u>Other Countries</u>
1926	112,531	90,459	-	-	17,918	4,154
1927	132,856	129,783	-	-	-	3,073
1928	74,886	72,119	-	-	2,515	252
1929	95,327	80,828	-	-	4,988	9,511
1930	144,965	131,789	-	8,397	4,779	-
5-year average..	112,113	100,996	-	1,679	6,040	3,398
1931	157,910	139,020	3,014	12,541	3,188	147
1932	64,663	60,880	1,371	-	-	2,412
1933	80,881	25,007	41,893	12,296	-	1,685
1934	12,206	6,876	4,401	-	-	929
1935	143	143	-	-	-	-
5-year average..	63,161	46,385	10,136	4,967	638	1,035
1936	-	-	-	-	-	-
1937	-	-	-	-	-	-
1938	-	-	-	-	-	-

British Malaya

British Malaya imported, on an average, 622,457 barrels of wheat flour during the period 1926-30 and ranked third as an importer among the British Empire countries. The greatest part of these imports (556,983 barrels), came from Empire countries, principally Australia with 495,765 barrels. The imports from foreign countries amounted to only 65,474 barrels. During the next five years 1931-35 total imports averaged 594,915 barrels, of which 583,487 barrels were Empire-produced. Australia was the largest contributor, while the imports from foreign countries were reduced to 11,428 barrels.

In 1936, the total imports rose to 703,577 barrels, and in 1937 they were further increased to 776,954 barrels and in 1938 a slight reduction was shown at 741,139 barrels. There has been no change in the sources of this increased import, Australia being the chief and British India-Burma second. The imports from Canada averaged only 2,057 barrels during the period 1926-30 and were reduced to 811 barrels in the following five years. A small increase was shown in 1937 when the import was 1,042 barrels, but 1938 showed a 50 per cent decrease so that not even the low five-year average is being maintained at present.

There are no records of the capacities of flour mills, if any, in these states.

Calendar Year	Total Imports	British Empire Imports	Australia (Barrels)	British India and Burma	Canada	Hong Kong
1926	566,217	478,458	401,257	33,520	1,989	39,943
1927	652,125	570,251	512,354	36,137	3,463	16,526
1928	607,314	534,011	460,103	41,897	2,149	27,714
1929	649,977	609,372	550,137	44,777	709	12,549
1930	636,652	592,823	544,961	43,771	1,977	1,097
5-year average..	622,457	556,983	495,763	40,020	2,057	19,566
1931	572,000	542,446	495,052	45,737	1,326	252
1932	525,497	522,480	485,178	36,365	926	-
1933	535,531	528,502	511,234	16,811	240	46
1934	663,106	655,633	622,227	32,526	720	-
1935	678,446	668,377	625,098	42,137	845	-
5-year average..	594,915	583,487	547,758	34,715	811	60
1936	703,577	684,057	635,178	47,794	811	-
1937	776,954	769,617	714,558	53,687	1,042	-
1938	741,139	739,177	673,369	64,823	530	-
Calendar Year	Other British Empire Countries	Foreign Imports	United States (Barrels)	China	Japan and Formosa	Other Foreign Countries
1926	1,749	87,759	17,806	32,617	37,314	22
1927	1,771	81,874	34,160	25,794	21,897	23
1928	2,148	73,303	41,223	24,309	7,223	548
1929	1,200	40,605	35,749	4,811	11	34
1930	1,017	43,829	26,812	14,636	2,287	44
5-year average..	1,577	65,474	31,150	20,443	13,746	135
1931	79	29,554	13,439	14,938	1,177	-
1932	11	3,017	2,777	229	-	11
1933	171	7,029	2,366	2,720	1,851	92
1934	160	7,473	5,040	674	1,634	125
1935	297	10,069	1,897	845	4,995	2,332
5-year average..	143	11,428	5,104	3,881	1,931	512
1936	274	19,520	1,326	5,646	12,503	45
1937	330	7,367	850	1,184	5,208	95
1938	455	1,962	1,065	887	9	1

Newfoundland

Newfoundland is one of Canada's best wheat flour customers importing on an average of 326,921 barrels, out of a total of 372,536 barrels, during the five-year period 1926-30. Newfoundland was the fifth largest wheat flour importer in the British Empire.

The five years referred to are calendar years. In 1931 the Government of Newfoundland changed their trade year from the calendar year to the fiscal year ending June 30. This makes the figures not comparable with the previous five-year period.

According to the figures of imports in the last five fiscal years 1930-31 to 1934-35, Newfoundland imported on an average, 410,981 barrels, coming chiefly from Canada, United States and the United Kingdom. During the fiscal year 1935-36, total imports of wheat flour were 422,143 barrels; in 1936-37 they were increased to 450,108 barrels while in 1937-38 a small decrease is shown, the total imports amounting to 412,146 barrels. The chief sources of the imports were the countries mentioned previously. The imports from the United States showed increased amounts for the last two years.

No reports are shown of the size and capacity of flour mills in Newfoundland.

The Newfoundland tariff shows wheat meal and flour are free from all countries.

<u>Calendar Year</u>	<u>Total Imports</u>	<u>British Empire Imports (Barrels)</u>	<u>Canada</u>	<u>United Kingdom</u>
1926	361,232	330,231	330,231	-
1927	368,240	318,446	318,406	40
1928	389,467	355,950	355,938	12
1929	371,273	332,068	332,067	1
1930	372,467	297,962	297,961	1
5-year average.....	372,536	326,932	326,921	11
1/ 1930-31	379,839	308,059	306,600	1,459
1/ 1931-32	369,286	287,637	284,717	2,920
1/ 1932-33	408,165	338,678	323,757	14,921
1/ 1933-34	443,007	380,145	352,090	28,055
1/ 1934-35	454,606	387,154	319,579	67,575
5-year average.....	410,981	340,335	317,349	22,986
1/ 1935-36	422,143	2/361,735	294,268	65,957
1/ 1936-37	450,108	365,645	313,990	51,655
1/ 1937-38	412,146	327,034	274,643	52,391

2/ Includes 1,510 barrels from Australia.

<u>Calendar Year</u>	<u>Foreign Imports</u>	<u>United States (Barrels)</u>	<u>St. Pierre</u>	<u>Norway</u>
1926	31,001	30,798	23	-
1927	49,794	49,754	40	-
1928	33,517	33,426	91	-
1929	39,205	38,931	274	-
1930	74,505	74,496	8	1
5-year average	45,604	45,517	87	-
1/ 1930-31	71,780	71,727	53	-
1/ 1931-32	81,649	81,065	584	-
1/ 1932-33	69,487	69,228	253	6
1/ 1933-34	62,862	62,440	422	-
1/ 1934-35	67,452	66,919	527	6
5-year average	70,646	70,276	368	2
1/ 1935-36	60,408	59,122	1,286	-
1/ 1936-37	84,463	83,777	686	-
1/ 1937-38	85,112	84,765	347	-

1/ Fiscal year ending June 30.

Palestine

The total wheat flour imports of Palestine during the five years 1926-30 averaged 227,505 barrels, but as these imports are not shown by countries for 1926, the five-year average can be shown only for the total. This makes our figures somewhat incomplete.

In the earlier years the figures of imports are shown as from countries of consignment, but beginning with 1934, countries of origin are given instead.

It will be noted that for the years 1927-32, Egypt and the United States were the chief countries of export, while from 1933 to 1937, Australia, the United States and Syria were the principal sources of supply.

Decreased imports are shown from British Empire countries during the year 1936, and of a total import of 344,524 barrels, only 97,881 barrels came from the Empire countries of Australia, Canada and the United Kingdom, while 245,796 came from Syria and the United States. In 1937, the total imports amounted to 307,261 barrels, of which Australia and Canada contributed 101,622 barrels. The imports from foreign countries were 205,659 barrels, coming chiefly from the United States and Syria.

Palestine imports a low grade flour rather than the strong flours made from Canadian hard wheat.

<u>Calendar Year</u>	<u>Total Imports</u>	<u>British Empire Imports</u>	<u>United Kingdom (Barrels)</u>	<u>Australia</u>	<u>Canada</u>	<u>Other British</u>
1926	225,873	-	-	-	-	-
1927	204,139	26,703	-	23,787	2,916	-
1928	241,523	20,568	185	14,164	6,219	-
1929	309,802	19,416	134	16,831	2,451	-
1930	156,192	17,864	131	14,467	3,266	-
5-year average ...	227,505	^{1/} 21,138	113	17,312	3,713	-
1931	190,278	17,968	-	15,099	2,869	-
1932	225,619	16,525	173	12,474	3,878	-
1933	302,788	99,876	1,814	88,571	9,491	-
1934	277,770	130,472	62	121,753	8,657	-
1935	380,036	180,286	1,650	173,371	5,265	-
5-year average ...	275,298	89,025	740	82,253	6,032	-
1936	344,524	97,881	1,429	93,899	2,553	-
1937	307,261	101,602	-	100,804	798	-
1938		Not yet available				

<u>Calendar Year</u>	<u>Foreign Imports</u>	<u>France</u>	<u>Egypt</u>	<u>Syria</u>	<u>United States</u>	<u>Other Foreign Countries</u>
		<u>(Barrels)</u>				
1926		Not available by countries				
1927	177,436	170	143,227	668	28,784	4,587
1928	220,955	22,817	155,091	183	40,296	2,568
1929	290,386	88,527	125,883	2,353	58,412	15,211
1930	138,328	7,274	89,015	1,398	38,616	2,025
4-year average ...	206,776	29,696	128,304	1,150	41,527	6,099
1931	172,310	12	90,959	51,218	24,586	5,535
1932	209,093	18,701	116,184	34,142	15,078	24,988
1933	202,912	5,059	81,193	58,832	55,650	2,178
1934	147,298	166	-	42,309	103,565	1,258
1935	199,750	-	-	33,925	165,816	9
5-year average ...	186,273	4,788	57,667	44,085	72,939	6,794
1936	246,643	-	-	102,741	143,055	847
1937	205,659	1,201	766	32,423	169,407	1,862
1938		Not yet available				

^{1/} All averages except Total are four-year.

Ceylon

Ceylon's imports of wheat flour averaged 223,566 barrels during the five years 1926-30. The average for the next five-year period (1931-35) decreased to 202,298 barrels. In the years 1936, 1937 and 1938, the total imports were 164,570; 163,609 and 179,341 barrels respectively. Most of these imports came from British Empire countries, chiefly Australia and British India. Ceylon ranks ninth in the British Empire countries as an importer of wheat flour for the five-year period 1926-30 and tenth in the next period but shows a falling off from the last average in succeeding years.

There are no flour mills of any account in Ceylon.

The sources of the imports of wheat flour into Ceylon were as follows, according to the annual Trade returns:-

<u>Calendar Year</u>	<u>Total Imports</u>	<u>British Empire Imports</u>	<u>Australia</u> (Barrels)	<u>British India</u>	<u>Other British Countries</u>
1926	205,179	205,179	159,374	45,545	260
1927	222,796	222,796	179,009	43,787	-
1928	234,136	233,737	204,044	29,693	-
1929	226,652	226,651	216,045	10,599	7
1930	229,068	229,067	215,767	13,272	28
5-year average	223,566	223,486	194,848	28,579	59
1931	214,046	214,046	206,646	7,399	1
1932	207,928	207,928	203,540	4,362	26
1933	176,176	176,176	173,332	2,844	-
1934	194,279	191,175	185,077	6,098	-
1935	219,058	211,033	207,856	3,121	56
5-year average	202,298	200,072	195,290	4,765	17
1936	164,570	164,570	152,837	11,659	74
1937	163,609	163,609	143,881	19,727	1
1938	179,341	179,338	168,309	11,029	-

<u>Calendar Year</u>	<u>Foreign Imports</u>	<u>United States</u>	<u>France</u> (Barrels)	<u>Egypt</u>	<u>Other Foreign Countries</u>
1926	-	-	-	-	-
1927	-	-	-	-	-
1928	399	391	-	8	-
1929	1	1	-	-	-
1930	1	1	-	-	-
5-year average	80	79	-	1	-
1931	-	-	-	-	-
1932	-	-	-	-	-
1933	-	-	-	-	-
1934	3,104	-	3,004	-	100
1935	8,025	-	7,913	-	112
5-year average	2,226	-	2,183	-	43
1936	-	-	-	-	-
1937	-	-	-	-	-
1938	3	-	-	-	-

New Zealand

New Zealand, as an importer of wheat flour, ranked tenth in the British Empire countries during the five-year period 1926-30. The average annual import was 142,914 barrels, of which 140,010 came from Australia, Canada and the United Kingdom. For the next five-year period, the average import was 120,731 barrels, only 92,992 coming from the British Empire countries, while 27,739 barrels were received from the United States. Canada's exports to New Zealand increased fairly steadily during the ten years commencing in 1927 but have since ceased almost completely.

During the year 1936 the imports amounted to only 77,593 barrels, the greater part of which came from Canada and the United States. The following two years, imports were negligible, amounting to only 3,749 and 376 barrels respectively.

On examining the imports of wheat it is found that New Zealand has increased the importation from 407,114 bushels in 1936 to 3,444,869 in 1938, which is one of the reasons for the decreased imports of wheat flour.

Import Restriction:

By an Order-in-Council effective December 8, 1938, imports into New Zealand (with minor exceptions) were prohibited except under license issued to the importer by the Minister of Customs. The extent to which imports of various goods will be licensed for admission during 1939 is fixed for periods of six months. For the second half of 1939, imports of wheat flour are placed under control of the Department of Industries and Commerce, no fixed quota being announced.

The following information regarding flour milling is extracted from the official Year Book of New Zealand:-

"The apparent consumption of flour in the Dominion during 1936-37 was 142,796 tons, or 1,457,102 barrels. During that period, the fifty grain-mills in operation produced 132,987 tons, or 93 per cent of the amount consumed. The quantity of wheat ground was 6,368,610 bushels, 47.13 bushels on the average being required to make a ton of flour. In addition to making flour, local mills manufactured 4,085 tons of oatmeal, 3,801 tons of other oaten products for human consumption, 19,110 tons of bran, 34,956 tons of pollard, and other products to the value of £70,512. The amount of capital invested in the industry's fixed assets was £799,142.

Recently steps have been taken by the Government towards the betterment of the industry. The Board of Trade (Flour) Regulations gazetted on 1st April, 1936, and additional regulations since gazetted, aim at the rationalization of the industry. These regulations provide, inter alia, for the establishment of a monthly quota of output to be allotted to each mill, while the Wheat Purchase Committee is required, from time to time, to fix the sale price of flour. The prices at which milling wheat is made available to millers are also declared by the Committee each season, under previous regulations. Measures have also been taken to restrict the importation of flour so that the gristing of any necessary imports of wheat will be done in New Zealand mills."

New Zealand has a population of 1,560,000 with a per capita consumption of wheat of 4.3 bushels, in 1937.

<u>Calendar Year</u>	<u>Total Imports</u>	<u>British Empire Imports</u> (Barrels)	<u>Australia</u>	<u>Canada</u>
1926	274,401	273,886	270,784	3,079
1927	146,162	146,032	124,052	21,965
1928	96,943	94,691	36,186	58,479
1929	99,742	96,642	37,506	59,135
1930	97,324	88,303	34,481	54,314
5-year average	142,914	140,010	100,602	39,394
1931	120,629	111,127	59,379	51,748
1932	132,743	108,488	36,936	71,552
1933	113,796	75,758	15,107	60,651
1934	111,625	83,318	5,875	77,440
1935	124,863	86,270	2,983	83,284
5-year average	120,731	92,992	24,056	68,935
1936	77,593	53,422	902	52,516
1937	3,749	3,545	405	3,140
1938	376	331	297	-

<u>Calendar Year</u>	<u>United Kingdom</u>	<u>Foreign Imports</u> (Barrels)	<u>United States</u>	<u>Hungary</u>
1926	23	515	515	-
1927	15	130	130	-
1928	26	2,252	2,252	-
1929	1	3,100	3,089	11
1930	8	8,521	8,521	-
5-year average	14	2,904	2,902	2
1931	-	9,502	9,502	-
1932	-	24,255	24,255	-
1933	-	38,038	38,038	-
1934	3	28,307	38,302	5
1935	3	38,593	38,593	-
5-year average	1	27,739	27,738	1
1936	-	24,171	24,171	-
1937	-	204	204	-
1938	34	45	45	-

Cyprus

In the 1926-30 period Cyprus imported an average of 152,192 barrels of wheat flour, most of which came from Australia. During the next five years imports averaged 231,753 barrels, coming chiefly from Australia, Italy, France and Bulgaria. In 1936 imports were reduced to only 96,654 barrels. In 1937, they rose to 183,219 barrels and in 1938 increased again to 193,273 barrels. The great majority of these imports came from Australia and British India.

No records are shown of the capacity of flour mills in Cyprus, nor of imports of wheat flour from Canada.

The following tables show the sources of wheat flour imports into Cyprus according to Trade Returns:-

<u>Calendar Year</u>	<u>Total Imports</u>	<u>British Empire Imports</u>	<u>Australia</u> (Barrels)	<u>British India</u>	<u>Other British Empire Countries</u>
1926	119,550	110,159	106,256	3,886	17
1927	143,372	138,469	137,742	650	77
1928	191,528	175,235	171,154	3,583	498
1929	182,916	175,012	174,452	-	560
1930	123,592	119,035	115,214	-	3,821
5-year average...	152,192	143,582	140,964	1,624	994
1931	233,540	204,120	204,067	-	53
1932	309,399	159,388	158,819	-	569
1933	314,825	75,058	75,058	-	-
1934	229,674	129,905	129,875	-	30
1935	71,328	68,187	68,164	-	23
5-year average...	231,753	127,352	127,197	-	135
1936	96,654	95,881	95,736	-	145
1937	183,219	183,051	139,514	43,431	106
1938	193,273	192,986	159,162	33,317	507

<u>Calendar Year</u>	<u>Foreign Imports</u>	<u>Bulgaria</u>	<u>Egypt</u>	<u>France</u> (Barrels)	<u>Italy</u>	<u>United States</u>	<u>Other Foreign Countries</u>
1926	9,391	1,879	403	4,702	-	1,336	1,071
1927	4,903	2,469	482	111	-	1,604	237
1928	16,293	4,435	517	5,122	708	789	4,722
1929	7,904	-	35	4,254	2,945	663	7
1930	4,557	494	23	2,138	1,734	159	9
5-year average...	8,610	1,855	292	3,266	1,078	910	1,209
1931	29,420	20,846	285	7,739	423	92	35
1932	150,011	71,159	35	17,209	59,473	101	2,034
1933	239,767	935	-	101,536	137,043	249	4
1934	99,769	22	-	8,745	90,163	238	601
1935	3,141	-	-	-	2,924	207	10
5-year average...	104,421	18,592	64	27,046	58,005	177	537
1936	773	-	-	-	-	767	6
1937	168	-	-	-	-	157	11
1938	287	-	-	-	-	287	-

Hong Kong

Hong Kong is a convenient distributing centre for certain commodities and considerable wheat flour is received there and shipped to China and other parts of the Orient.

Imports by countries of origin are available only from 1931, and according to the average for the five years 1931-35 the import was 993,770 barrels, of which Australia shipped the largest and the United States and Canada the next largest quantities.

In 1936, the total import was 655,953 barrels, Australia and Canada supplying the greatest amounts. In 1937 and 1938, the imports were 777,012 and 928,345 barrels respectively. Australia, the United States and Canada furnished practically the whole amount in the order indicated.

The following table shows the sources of wheat flour imports into Hong Kong according to Trade Returns:-

<u>Calendar Year</u>	<u>Total Imports</u>	<u>Canada</u>	<u>Australia</u>	<u>United States</u>	<u>Other Countries</u>
			(Barrels)		
1931	1,141,877	196,911	76,034	829,387	39,545
1932	1,324,715	245,107	607,560	471,172	876
1933	756,781	205,477	320,330	228,940	2,034
1934	746,755	181,490	326,899	199,965	38,401
1935	998,722	176,837	685,431	79,006	57,448
5-year average	993,770	201,164	403,251	361,694	27,661
1936	655,953	117,371	421,653	32,414	84,515
1937	777,012	113,436	464,319	152,878	46,379
1938	928,345	114,152	576,090	237,602	501

British Guiana

The average imports of wheat flour during the five-year period 1926-30 were 170,316 barrels. In the earlier years practically all of this came from Canada but later the United Kingdom supplied increasing amounts until, in the ensuing period, the greater part of the average of 177,650 barrels was furnished by the latter. Almost all the remainder was of Canadian manufacture, the contributions from foreign countries being practically negligible.

During the years 1936 and 1937 the total imports were 173,929 and 174,947 barrels respectively of which Canada and the United Kingdom still shipped almost all of this import. In 1938 the United Kingdom came to the fore once more and supplied more than half of the total importation.

The size and capacity of flour mills in British Guiana are not reported.

British Guiana (Concluded)

The following table shows the sources of wheat flour imports into British Guiana according to their Trade Returns:-

<u>Calendar Year</u>	<u>Total Imports</u>	<u>Canada</u> (Barrels)	<u>United Kingdom</u>	<u>Foreign Countries</u>
1926	184,492	181,265	-	3,227
1927	157,817	156,601	19	1,197
1928	176,220	166,120	9,956	144
1929	176,914	127,454	48,784	676
1930	156,135	93,160	56,002	6,973
5-year average.....	170,316	144,920	22,952	2,444
1931	168,218	77,929	87,369	2,920
1932	160,739	59,341	101,194	204
1933	179,422	73,781	105,641	-
1934	195,781	73,727	119,107	2,947
1935	184,091	67,829	114,375	1,887 <u>1/</u>
5-year average.....	177,650	70,521	105,537	1,592
1936	173,929	93,584	79,944	401
1937	174,947	99,230	74,774	943 <u>1/</u>
1938	186,250	79,411	101,566	5,273

1/ Includes Australia.

Mauritius

The five-year average importation for the period 1926-30 amounted to 105,122 barrels, mostly from Australia and British India. The next five years witnessed a rise in importation, the total amounting to 118,552 barrels. Australia supplied nearly all the latter amount. In 1936, all the decreased import came from British Empire countries, mainly Australia and in 1927, almost all of the 111,458 barrels imported were Australian and no other Empire country was represented among the sources of supply.

No flour mills are reported in Mauritius.

The following table shows the sources of wheat flour imports into Mauritius, according to their Trade Returns:-

<u>Calendar Year</u>	<u>Total Imports in Mauritius</u>	<u>Total Imports from British Empire Countries</u>	<u>Australia</u> (Barrels)	<u>Canada</u>	<u>India</u>	<u>Other British Countries</u>	<u>Other Foreign Countries</u>
1926	73,295	73,150	37,275	20	35,845	10	145
1927	109,136	109,090	61,140	-	47,947	3	46
1928	131,126	131,081	83,910	-	47,171	-	45
1929	109,142	109,142	85,503	-	23,637	2	-
1930	102,909	102,908	49,867	-	53,035	6	1
5-year average	105,122	105,074	63,538	4	41,526	4	47
1931	117,430	117,259	94,965	-	22,294	-	171
1932	94,220	94,220	91,829	-	2,391	-	-
1933	106,421	106,418	105,005	-	1,412	1	3
1934	166,429	166,429	165,560	10	858	1	-
1935	108,263	108,263	108,072	-	187	3	-
5-year average	118,552	118,517	113,086	2	5,428	1	34
1936	91,143	91,142	89,356	-	1,780	6	1
1937	111,458	111,457	110,112	12	1,333	-	1
1938			Not available				

Malta

Malta's total imports of wheat flour have shown comparatively small fluctuations since 1926. The average rose a little in the second-five year period as the two highest of the years under review were included in this span and more offset the low total in 1935. The three last years as a whole show a slight decrease but seem to indicate a coming rise.

For the two-five year periods approximately half of the imports were consigned from British Empire countries, Australia and Canada being the chief contributors. The United States and France supplied the bulk of the remainder, each sending the largest amount at varying times. Beginning in 1935, Empire imports showed a great percentage increase and since then have accounted for more than 80 per cent of every total.

No account of flour milling in Malta is recorded.

Imports are classified according to the countries from which they are consigned so that it cannot be said whether all the wheat flour originated in the countries whence received. The following table shows the imports according to Malta Trade Returns:-

<u>Calendar Year</u>	<u>Total Imports</u>	<u>British Imports</u>	<u>United Kingdom (Barrels)</u>	<u>Canada</u>	<u>Australia</u>	<u>Other British Countries</u>
1926	129,292	75,706	5,759	13,192	56,755	-
1927	136,740	89,097	4,974	12,148	71,975	-
1928	98,384	53,050	6,204	30,506	16,340	1
1929	125,008	51,340	9,529	21,608	20,203	-
1930	145,302	73,335	3,408	17,266	52,661	-
5-year average..	126,945	68,506	5,975	18,944	43,587	-
1931	151,617	74,670	4,281	9,577	60,812	-
1932	123,979	60,152	7,026	4,990	48,129	7
1933	152,063	72,782	5,351	10,085	57,147	199
1934	136,301	45,938	3,371	9,934	32,633	-
1935	90,870	66,039	5,286	26,725	33,971	57
5-year average..	130,966	63,916	5,063	12,262	46,538	53
1936	114,076	106,113	8,917	28,775	68,421	-
1937	101,347	82,421	3,913	29,297	49,154	57
1938	136,748	119,609	3,205	24,022	92,382	-

<u>Calendar Year</u>	<u>Foreign Imports</u>	<u>Egypt</u>	<u>France (Barrels)</u>	<u>Tunis</u>	<u>United States</u>	<u>Other Countries</u>
1926	53,586	694	887	1,679	49,255	1,071
1927	47,643	2,875	3	512	43,753	500
1928	45,334	1,371	14	362	43,583	4
1929	73,668	6	5,638	1,806	65,939	279
1930	71,967	-	21,654	954	46,842	2,517
5-year average..	58,439	989	5,639	1,063	49,874	874
1931	76,947	-	25,763	366	37,901	12,917
1932	63,827	-	23,963	2,811	18,867	18,186
1933	79,281	414	26,883	281	24,442	27,261
1934	90,363	407	52,559	-	22,110	15,287
1935	24,831	3	15,894	163	7,122	1,649
5-year average..	67,050	165	29,012	725	22,088	15,060
1936	7,963	332	5,182	71	962	1,416
1937	18,926	297	8,025	50	3,128	7,426
1938	17,139	123	3,601	5	10,459	2,951

Anglo-Egyptian Sudan

Imports of wheat flour into Anglo-Egyptian Sudan averaged 143,751 barrels during 1926-30, the Empire countries of British India, Australia and Great Britain supplying almost 95 per cent and France most of the remainder. The next five years saw an almost steady rise in total imports but a decrease in the percentage from British Empire countries. In this period Australia took precedence over British India each year and continued to do so in the succeeding years. No imports from Canada are recorded.

There is no account of mill capacities, if any.

The following table shows the sources of wheat flour imports into Anglo-Egyptian Sudan, according to Trade Returns:-

<u>Calendar Year</u>	<u>Total Imports</u>	<u>Imports from British Empire Countries</u>	<u>Australia</u> (Barrels)	<u>British India</u>	<u>Great Britain</u>
1926	121,006	110,966	27,972	82,091	903
1927	141,714	133,223	33,326	99,371	526
1928	124,674	117,451	32,948	83,737	766
1929	166,183	160,069	81,429	77,920	720
1930	165,177	160,378	88,424	71,337	617
5-year average	143,751	136,417	52,820	82,891	706
1931	173,669	171,635	109,521	61,600	514
1932	185,029	183,726	147,543	35,714	469
1933	140,069	130,789	128,503	2,149	137
1934	200,789	157,212	154,309	2,812	91
1935	247,097	165,040	158,823	5,931	286
5-year average	189,330	161,680	139,740	21,641	299
1936	155,291	107,119	101,908	4,640	571
1937	211,269	174,172	134,012	38,023	2,137
1938	199,966	192,492	161,155	30,171	1,166

<u>Calendar Year</u>	<u>Imports from Foreign Countries</u>	<u>Egypt</u>	<u>France</u> (Barrels)	<u>United States</u>	<u>1/Other Countries</u>
1926	10,040	4,423	-	5,560	57
1927	8,491	7,840	-	640	11
1928	7,223	5,954	469	651	149
1929	6,114	5,531	-	583	-
1930	4,799	4,286	11	46	456
5-year average	7,334	5,607	96	1,496	135
1931	2,034	1,177	-	69	788
1932	1,303	857	-	206	240
1933	9,280	229	8,434	126	491
1934	43,577	34	39,920	-	3,623
1935	82,057	80	81,726	-	251
5-year average	27,650	475	26,016	80	1,079
1936	48,172	1,006	45,977	-	1,189
1937	37,097	11,097	23,131	-	2,869
1938	7,474	2,583	2,617	354	1,920

1/ Includes other British Empire countries.

Union of South Africa

Imports of wheat flour into British South Africa, like those of wheat, have decreased latterly on account of increased home production. The average importation for the five years 1926-30 was 285,754 barrels and for the following period (1931-35) 13,858 barrels. The latter figure hardly expresses the full extent of the reduction, however, as the falling off in imports became even more pronounced after 1931 than it was in that year. The years 1936-38 showed a slight rise over the previous four years, although an average for these three years compares quite unfavourably with the given five-year period. In all of the thirteen years under review the vast majority of imports came from Empire countries, notably Australia and Canada.

The South African Official Year Book (1938) states:

"During the last few years, wheat-growing in the Union has developed considerably, owing to favourable weather conditions and abnormal economic conditions, including the policy of wheat protection. The increase in production has been due partly to the cultivation of new land, and partly to the replacement of other grains by wheat."

The last year for which milling statistics were available was 1935-36, when 133,312 tons (approximately 1,523,565 barrels) of flour were produced. The number of grain mills was shown as 888.

The population of the Union of South Africa is 9,590,000, with a per capita wheat consumption of 1.7 bushels in 1937.

Calendar Year	Total Imports	British Empire Imports	Australia (Barrels)	United Kingdom	Canada	Other British Empire Countries
1926	292,126	287,065	216,484	232	70,282	67
1927	273,955	266,303	198,772	407	67,037	87
1928	326,517	321,566	239,248	216	81,666	236
1929	332,879	321,435	268,160	95	52,906	274
1930	203,291	188,076	144,866	387	42,781	42
5-year average ...	285,754	276,849	213,506	268	62,934	141
1931	48,474	40,503	21,519	4	18,924	56
1932	3,848	3,641	1,532	209	1,864	36
1933	4,145	4,145	2,646	317	1,110	72
1934	6,055	6,034	2,475	755	2,734	70
1935	6,770	6,755	2,347	243	2,480	1,685
5-year average ...	13,858	12,215	6,104	305	5,422	384
1936	7,864	7,858	4,263	284	1,990	1,321
1937	4,549	4,513	1,638	50	1,814	1,011
1938	5,847	5,836	2,466	501	2,001	868

Calendar Year	United States (Barrels)	Other Foreign Countries
1926	4,860	201
1927	7,471	181
1928	5,106	45
1929	11,320	124
1930	15,207	8
5-year average ...	8,793	112
1931	7,971	-
1932	207	-
1933	-	-
1934	3	18
1935	3	12
5-year average ...	1,637	6
1936	6	-
1937	28	8
1938	3	8

Trinidad and Tobago

Trinidad and Tobago imported on an average 301,306 barrels of wheat flour during 1926-30. Most of this came from Canada but in the last two years of the period contributions from the United Kingdom began to mount, and by the end of the second period (1931-35) Canada was supplying less than two-thirds of the British Empire total and the United Kingdom almost all the rest. In 1936 and 1938, Canadian and United Kingdom contributions maintained approximately these relations but, in 1937, both suffered a drop, the latter a greater one, and other British countries supplied almost one-quarter of the total imports. Imports from foreign countries were at no time large and the United States was the only regular source from which these were derived.

The following shows the sources of wheat flour imports into Trinidad and Tobago, according to Trade Returns, 1937 and 1938:-

<u>Calendar Year</u>	<u>Total Imports</u>	<u>British Empire Imports</u>	<u>Canada (Barrels)</u>	<u>United Kingdom</u>	<u>Other British Countries</u>
1926	282,606	271,938	271,767	146	25
1927	285,788	284,250	284,250	-	-
1928	310,599	309,273	309,271	1	1
1929	324,574	317,150	304,281	12,868	1
1930	302,966	300,461	283,478	16,981	2
5-year average	301,306	296,614	290,609	5,999	6
1931	329,658	328,888	288,210	36,118	4,560
1932	309,409	309,205	191,827	117,378	-
1933	340,296	340,147	217,101	122,546	500
1934	339,748	331,334	194,113	137,221	-
1935	334,032	330,306	162,630	167,462	214
5-year average	330,628	327,975	210,776	116,145	1,054
1936	352,799	352,649	225,382	113,311	13,956
1937	341,255	340,718	200,946	58,249	81,523
1938	350,920	332,152	202,790	49,172	80,190

<u>Calendar Year</u>	<u>Foreign Imports</u>	<u>Argentina</u>	<u>United States (Barrels)</u>	<u>China</u>	<u>Other Foreign</u>
1926	10,668	3,362	7,305	-	1
1927	1,538	-	1,538	-	-
1928	1,326	425	901	-	-
1929	7,424	2,487	4,937	-	-
1930	2,505	110	2,393	2	-
5-year average	4,692	1,277	3,415	-	-
1931	770	-	765	5	-
1932	204	-	204	-	-
1933	149	-	146	-	3
1934	8,414	-	212	1	8,201
1935	3,726	2	110	-	3,614
5-year average	2,653	-	288	1	2,364
1936	150	-	115	-	35
1937	537	-	530	-	7
1938	18,768	-	18,767	-	1

Jamaica

Wheat flour imports into Jamaica averaged 345,786 barrels during the five years 1926-30, although this period included the lowest figure in the thirteen years covered by this survey. The following five years showed a smaller average (393,561 barrels) but actual amounts were again increasing. The years 1936-38 presented an average of 402,832 barrels.

In the first five-year period (1926-30) Canada supplied over 74 per cent of the total and the United States nearly all the remainder. There were very minor contributions from the United Kingdom each year and a few trifling amounts from China. During the course of the next five years, however, the United Kingdom and other British countries increased their shipments and although the total was 97 per cent Empire-produced Canada's share was only 73 per cent. The United States continued as chief of the foreign contributors. In 1936 and 1937, British Empire countries supplied almost all Jamaican demands and showed a 92 per cent monopoly in 1938.

There are no flour mills of any account in Jamaica.

According to Jamaican Trade Returns, the sources of the wheat flour imports were as follows:-

<u>Calendar Year</u>	<u>Total Imports</u>	<u>British Empire Imports Into Jamaica</u>	<u>Canada (Barrels)</u>	<u>United Kingdom</u>	<u>Other British Countries</u>
1926	293,354	169,366	169,306	60	-
1927	328,973	218,799	218,794	5	-
1928	402,264	337,104	337,045	59	-
1929	384,813	333,100	332,380	220	-
1930	319,528	271,394	270,749	645	-
5-year average	345,786	265,952	265,754	198	-
1931	342,820	311,985	311,215	745	25
1932	367,114	359,741	285,966	73,775	-
1933	446,636	443,023	324,167	120,856	-
1934	402,175	397,966	260,827	136,814	325
1935	409,059	394,478	255,762	103,909	34,807
5-year average	393,561	381,839	287,588	87,220	7,031
1936	427,776	426,635	269,011	66,164	91,460
1937	367,091	359,491	211,335	36,365	111,791
1938	413,631	382,345	228,750	41,173	112,422

<u>Calendar Year</u>	<u>Foreign Imports Into Jamaica</u>	<u>United States (Barrels)</u>	<u>China</u>	<u>Other Foreign Countries</u>
1926	123,988	123,978	10	-
1927	110,174	110,160	14	-
1928	65,160	65,150	10	-
1929	51,713	51,713	-	-
1930	48,134	48,134	-	-
5-year average	79,834	79,827	7	-
1931	30,835	30,835	-	-
1932	7,373	7,373	-	-
1933	1,613	1,613	-	-
1934	4,209	1,181	-	3,028
1935	14,581	4,960	-	9,621
5-year average	11,722	9,192	-	2,530
1936	1,141	1,141	-	-
1937	7,600	7,600	-	-
1938	31,286	31,286	-	-

Aden

The Trade Returns of Aden show the distribution of the imports for the fiscal years ending March 31, while the imports, shown on page 7 are taken from the International Institute report and are for the calendar years.

The average imports of wheat flour during the five fiscal years 1930-31 to 1934-35 was 93,982 barrels, of which India and Australia were chief contributors. In the fiscal year 1935-36, imports rose to 141,029 barrels coming principally from France, Australia and India. A notable increase is shown in the imports from France. In the following years imports decreased to 121,918 barrels, the greater part of which were supplied by India, France and Australia.

No Trade Return has arrived from Aden for 1937-38 but according to the calendar year 1938 the imports were 140,039 barrels.

According to Aden Trade Returns, imports of wheat flour into Aden, for the fiscal years 1930-31 to 1936-37 were as follows:-

<u>Fiscal Year</u> <u>March 31</u>	<u>Total</u> <u>Imports</u>	<u>British</u> <u>Empire</u> <u>Imports</u>	<u>Australia</u>	<u>Canada</u>	<u>India</u>	<u>Other</u> <u>British Empire</u> <u>Countries</u>
			(Barrels)			
1930-31	83,708	82,617	17,963	382	64,159	113
1931-32	86,745	85,789	24,678	-	61,043	68
1932-33	82,471	80,941	39,188	-	41,393	360
1933-34	104,934	99,220	66,049	214	32,788	169
1934-35	112,054	54,227	34,509	101	19,606	11
5-year average ...	93,982	80,558	36,477	139	43,798	144
1935-36	141,029	83,686	48,311	-	35,341	34
1936-37	121,918	96,981	21,608	-	67,792	7,581
1937-38			Not yet available			

<u>Fiscal Year</u> <u>March 31</u>	<u>Foreign</u> <u>Imports</u>	<u>France</u>	<u>United</u> <u>States</u>	<u>Other</u> <u>Foreign</u> <u>Countries</u>
		(Barrels)		
1930-31	1,091	-	79	1,012
1931-32	956	-	922	34
1932-33	1,530	-	585	945
1933-34	5,714	4,803	821	90
1934-35	57,827	51,280	495	6,052
5-year average ...	13,424	11,217	580	1,627
1935-36	57,343	54,520	911	1,912
1936-37	24,937	23,722	945	270
1937-38			Not yet available	

China

Although usually one of the world's largest wheat producers, still as an importer of wheat flour, China at present ranks among the first. During the five-year period 1926-30 an average of 4,248,034 barrels was imported, second only to the United Kingdom. This included 1,517,809 barrels from British Empire countries and 2,730,225 from foreign countries. Canada and Hong Kong were the largest contributors to the former total and Japan and the United States supplied most of the latter.

For the period 1931-35 wheat flour imports receded to 2,286,681 barrels, little more than half the average for the previous period. Of this amount British Empire countries supplied 649,705 barrels, Australia being the major contributor, no doubt by reason of more favourable exchange rates and proximity to the Oriental market. The importation from British Empire countries shows a percentage decrease, however, and that from foreign countries, a corresponding increase, although there is a great reduction in actual import figures.

In 1936 and 1937 there were noticeably reduced importations and those mostly from British Empire countries, but the 1938 imports rose abruptly and British Empire contributions fell again to less than fifty per cent of the total, Australia still maintaining first place. Amounts coming from Canada and Hong Kong display considerable fluctuations, as do also those from Japan and the United States.

It must be stated that Hong Kong is not a country of origin but only a trans-shipping centre which supplies that part of China near the coast.

Production and mills.

More than 85 per cent of the wheat flour consumed in China is produced by native mills, which are small and usually of home construction, most of them operated by animal power. Only two modern mills were in existence prior to 1900 but several were established during the years 1915-24, and at the beginning of 1937 there were seventy in operation, with a total capacity of about 75,000 barrels per day. The principal flour-milling centres, in order of importance were Shanghai, Tsinan, Hankow, Tientain, Wusih and Nanking. The need for more modern mills is recognized, but due to economic conditions the transition is not very rapid.

According to Chinese Trade Returns, the sources of the imports were as follows:-

Calendar Year	Total Imports	British Empire Imports	Canada	Hong Kong (Barrels)	Australia	British India	Other British Empire Countries
1926	2,922,473	822,322	590,647	221,903	<u>1/</u> 8,124	1,109	539
1927	2,601,509	1,009,847	457,710	550,657	<u>1/</u> 1,413	65	2
1928	4,070,368	1,774,006	829,487	942,436	<u>1/</u> 1,581	110	392
1929	8,117,298	2,997,711	2,125,705	871,396	<u>1/</u> 500	110	-
1930	3,528,524	985,159	286,073	675,460	<u>1/</u> 23,262	364	-
5-year average	4,248,034	1,517,809	857,924	652,370	6,976	352	187
1931	3,325,363	866,295	99,052	753,641	13,484	118	-
1932	4,662,113	620,429	65,945	71,557	476,788	751	5,388
1933	2,201,584	1,150,357	80,291	18,887	1,049,714	63	1,402
1934	670,133	259,011	123,357	505	134,775	87	287
1935	574,212	352,433	146,918	-	205,515	-	-
5-year average	2,286,681	649,705	103,113	168,918	376,055	204	1,415
1936	348,792	250,328	123,743	102	126,483	-	-
1937	341,793	253,494	88,176	920	164,398	-	-
1938	2,865,772	1,383,743	86,113	15,901	1,281,729	-	-

Calendar Year	Foreign Imports	Japan	United States (Barrels)	Korea	Other Foreign Countries
1926	2,100,151	<u>2/</u> 1,066,106	<u>3/</u> 985,066	38,820	10,159
1927	1,591,661	<u>2/</u> 721,313	<u>3/</u> 823,892	36,697	9,760
1928	2,296,362	<u>2/</u> 1,179,905	<u>3/</u> 1,038,945	65,624	11,888
1929	5,119,587	<u>2/</u> 2,180,158	<u>3/</u> 2,814,464	110,261	14,703
1930	2,543,365	<u>2/</u> 1,096,780	<u>3/</u> 1,379,352	55,861	11,372
5-year average...	2,730,225	1,248,852	1,408,344	61,453	11,576
1931	2,459,068	1,483,340	<u>3/</u> 941,794	5,782	28,152
1932	4,041,684	1,356,666	2,663,366	13,311	8,341
1933	1,051,227	356,327	682,248	-	12,652
1934	411,122	11,096	399,728	-	298
1935	221,779	24,605	194,095	-	3,079
5-year average...	1,636,976	646,407	976,246	3,819	10,504
1936	98,464	57,662	39,248	-	1,554
1937	88,299	6,098	80,487	-	1,714
1938	1,482,029	1,255,295	197,868	4,433	<u>4/</u> 24,433

1/ Includes New Zealand.

2/ Includes Formosa.

3/ Includes Hawaii.

4/ Includes other British Empire Countries.

Brazil

Brazil's imports of wheat flour have declined materially since 1930. In the first five-year period (1926-30) the average was 2,136,775 barrels, but a gradual decrease had been taking place and the 1931 total showed a 60 per cent drop from the previous year. The extremely small import in 1932 was practically counterbalanced by an almost equally large one in 1934 and the second five-year average became 582,748 barrels. Subsequent importations (1936-38) were lower than this, and indicate that Brazil will not revert to the position of the world's second largest importer of wheat flour, the same as held in the first period under review.

The only British Empire source of Brazilian imports was Canada and these contributions were comparatively insignificant. Argentina and the United States competed for the position of chief supplier in the first period, but in the second, the former definitely outstripped the more distant contributor. In 1936, Uruguay also took precedence in this regard and the United States became third in the ranks of supplying countries.

The milling industry in Brazil has developed largely in the past few years and a considerable part of it is controlled by firms with extensive wheat interests in Argentina. Until recently, little attention was paid officially to wheat or flour production and consequently statistics regarding such are available for only a short period.

Official Registration of flour mills in Brazil numbers 71, of which 54 are located in the State of Rio Grande do Sul. The greatest production is in the State of Sao Paulo, totalling 3,745,000 barrels.

There are four interests which control 21 mills and produce 90 per cent of the flour of Brazil (namely, 8,627,660 barrels).

Most of these mills are within easy access of the coast, and hence shipping by water to the various sections of Brazil is very economical.

This explains the reason why most of the consumption is of national flour as it is only in the northern sections that flour is imported from North America. Canada has succeeded in exporting wheat and wheat flour only occasionally and not in exceptionally large quantities as it is only when there is a shortage in the Argentine production or when prices are low.

There is a very large demand for farinaceous pastes, the annual output of macaroni products alone being estimated at about 225 million pounds.

Early in 1938 a supervisory board for the flour trade (Wheat Flour Trade Control Service) was set up with wide powers to control the import of wheat and flour into Brazil and to encourage wheat production.

Extraction of wheat was set at 80% of all grades of flour except in the case of special licenses granted by the Control Board for the production of special types of flour for dietetic purposes.

To all flour milled from wheat must be added 10% cassava or manioc flour, 5% corn flour and 3% rice flour. In the case of flours intended for biscuits and alimentary paste, there must be added 10% cassava flour. These regulations apply likewise to imported flour and should this flour be of an extraction below 80%--the usual type imported being considered as from 72% to 73% extraction, there must be added 4% wheat bran or further 4% manioc flour.

Brazil (Concluded)

All mills are now obliged to mill at least 10 per cent Brazilian wheat, the actual amount to be based on their average annual output over the past five years. Any mill which fails to use its prescribed quota will be required to pay a tax of 12 milreis per sack of 60 kilos on 10 per cent of its average production.

According to Brazilian Trade Returns, the sources of the imports were as follows:-

<u>Calendar Year</u>	<u>Total Imports</u>	<u>Canada</u>
	(Barrels)	
1926	2,489,838	160,339
1927	2,296,496	1,727
1928	2,352,613	20,784
1929	1,832,068	-
1930	1,712,853	9,385
5-year average	2,136,775	38,447
1931	689,582	222
1932	56,392	-
1933	546,711	-
1934	1,109,670	-
1935	511,384	1,069
5-year average	582,748	258
1936	571,550	8,312
1937	464,625	Individual amounts not yet available.
1938	483,466	

<u>Calendar Year</u>	<u>Total Foreign Imports</u>	<u>Argentina</u>	<u>United States</u> (Barrels)	<u>Paraguay</u>	<u>Uruguay</u>	<u>Other Countries</u>
1926	2,329,499	937,692	1,261,737	4,010	124,249	1,811
1927	2,294,769	1,114,219	984,200	12,446	182,864	1,040
1928	2,331,834	1,263,430	859,985	3,944	204,339	136
1929	1,832,068	921,541	765,112	4,212	140,749	454
1930	1,703,468	642,875	841,916	5,082	213,260	335
5-year average	2,098,328	975,952	942,590	5,939	173,092	755
1931	689,360	284,058	397,623	-	4,615	3,064
1932	56,392	25,720	30,426	-	246	-
1933	546,711	359,882	141,328	1,595	43,906	-
1934	1,109,670	774,049	185,403	8,582	140,669	967
1935	510,315	389,533	76,847	1,777	42,147	11
5-year average	582,490	366,648	166,325	2,391	46,317	809
1936	563,238	331,347	72,573	79	159,239	-
1937	-	Individual amounts not yet available.				
1938	-	Individual amounts not yet available.				

Egypt

Egyptian imports of wheat flour averaged 2,142,383 barrels during the five-year period 1926-30. In the last year of this span, however, a protective tariff was imposed and the following five years showed a decreasing importation. In the two years succeeding further reductions occurred, but in 1938, the total rose once more.

According to the five-year averages, British Empire Countries, chiefly Australia, supplied more than two-thirds of the total wheat flour import into Egypt, but actually this state of affairs did not continue after 1932. From that year until 1937, foreign countries contributed the bulk of the imports (over 85 per cent in nearly every year), but in 1938 a gradual return to the original status quo has begun. The United States was the beneficiary in the temporary turning of the tables and is at present, the only exporter worthy of note, except Australia.

Flour Milling

Flour mills of importance are located at Cairo, Alexandria and Port Said. These are the principal centres of Egypt for the inward transportation of grain. Some ten of these mills are modern, well-equipped plants, possessed of ample financial resources; the others, although not entirely up-to-date, have a comparatively large capacity. A number of primitive mills scattered throughout the country cater to the needs of their respective localities, while quite a considerable quantity of wheat is ground in a primitive manner by the farmers themselves for home consumption.

With the exception of the few mills which cater to the better class Egyptian trade, local mills generally mix a percentage of rice or maize flour with the wheat.

Domestic flour is marketed generally through the medium of wholesale merchants.

Egypt has a population of 15,370,000 and in 1937 the per capita consumption was estimated at 2.5 bushels of wheat.

According to the Egyptian Trade Returns, the sources of the imports were as follows:-

<u>Calendar Year</u>	<u>Total Imports</u>	<u>British Empire Imports</u>	<u>Australia</u>	<u>British India</u>	<u>United Kingdom</u>	<u>Canada</u>
			(Barrels)			
1926	2,200,395	1,474,064	1,268,547	105,901	93,647	5,969
1927	1,749,195	1,342,382	1,217,773	51,235	69,102	4,272
1928	1,778,667	1,295,559	1,200,461	40,756	51,186	3,156
1929	2,626,358	1,731,468	1,604,765	7,814	44,614	74,275
1930	2,357,299	1,231,292	1,151,269	22,759	14,494	42,770
5-year average...	2,142,383	1,414,953	1,288,563	45,693	54,609	26,088
1931	1,712,452	1,143,184	1,125,357	9,712	1,850	6,265
1932	657,229	493,858	484,698	2,681	3,491	2,988
1933	59,019	6,501	2,306	-	1,871	2,324
1934	45,448	5,377	2,286	229	1,662	1,200
1935	36,261	4,891	2,575	-	1,456	860
5-year average...	502,082	330,762	323,444	2,524	2,066	2,728
1936	34,566	7,979	2,498	-	1,564	3,917
1937	26,282	4,918	1,553	-	1,226	2,139
1938	40,866	17,583	16,088	-	1,185	310

<u>Calendar Year</u>	<u>Foreign Imports</u>	<u>United States</u>	<u>France</u>	<u>Italy</u>	<u>Other Foreign Countries</u>
			(Barrels)		
1926	726,331	452,521	187,014	-	86,796
1927	406,813	367,546	10,871	993	1/ 27,403
1928	483,108	391,611	29,248	24,639	37,610
1929	894,890	421,510	127,406	332,562	13,412
1930	1,126,007	204,845	592,000	261,560	67,602
5-year average...	727,430	367,607	189,308	123,951	46,564
1931	569,268	162,562	301,641	58,075	46,990
1932	163,371	102,659	23,589	10,638	26,485
1933	52,518	52,233	111	1	173
1934	40,071	40,032	25	1	13
1935	31,370	31,187	-	-	183
5-year average...	171,320	77,735	65,073	13,743	14,769
1936	26,587	26,533	-	-	54
1937	21,364	21,304	-	-	60
1938	23,283	20,585	-	-	2,898

1/ Includes 14 barrels from other British Empire Countries.

Germany

German imports of wheat flour during the five years 1926-30 averaged 611,997 barrels, the greater part of which came from countries outside the British Empire. The United States was the largest single contributor, with Canada next in order of quantity supplied.

During the next five-year period (1931-35) the imports receded to the small amount of 61,572 barrels, of which almost half came from the Saar territory. In 1936 only 6,413 barrels were imported, the leading exporter being Poland. In 1937 imports increased to 543,791 barrels and came chiefly from the neighbouring countries of Czechoslovakia and Hungary, while in 1938 the importation amounted to 384,283 barrels, with Czechoslovakia, Yugoslavia and Hungary furnishing almost all.

Germany's largest crop is rye and previous to the war Germany was a rye-consuming country, but since the outbreak of war, rye production has decreased and wheat growing has replaced it. This increased wheat production explains the lowered importations of wheat flour.

It was estimated in 1930 that there were 34,926 flour mills in Germany, of which only 23,637 could be classed as commercial mills, the remainder grinding only for the owner's household needs. Commercial mills were roughly divided as follows: 17,049 mills with a daily capacity of 56 bbl. or less; 4,780 mills with a daily capacity of 225 bbl. or less; 1,064 mills with a daily capacity of 396 bbl. or less; and 144 mills with a daily capacity of more than 896 bbl. In 1933, German mills were forced into an association by the government, which regulates their supplies and stocks of raw materials, the amount of their flour output and the terms of their sales. Flour types are standardized and prices are controlled. German production of wheat flour probably is about 36,500,000 bbl. per year.

The population of Germany is 66,450,000 and in 1937 the per capita consumption was estimated at 2.9 bushels of wheat.

According to German Trade Returns, the sources of the imports of wheat flour were as follows:

<u>Calendar Year</u>	<u>Total Imports</u>	<u>British Empire Imports</u>	<u>Canada</u>	<u>United Kingdom</u>
(Barrels)				
1926	1,367,995	404,303	371,204	33,099
1927	668,601	164,016	154,767	9,248
1928	432,985	118,391	118,391	-
1929	340,818	79,047	79,047	-
1930	249,585	27,715	26,709	1,006
5-year average ...	611,997	158,695	150,024	8,671
1931	120,508	-	-	-
1932	91,711	-	-	-
1933	37,005	-	-	-
1934	27,959	906	56	850
1935	30,676	34	30	4
5-year average ...	61,572	188	17	171
1936	6,413	-	-	-
1937	543,791	1,599	1,599	-
1938	384,283	829	829	-

<u>Calendar Year</u>	<u>Foreign Imports</u>	<u>United States</u>	<u>Saar Territory</u>	<u>Netherlands</u>	<u>France</u>	<u>Lithuania</u>	<u>Other Foreign Countries</u>
(Barrels)							
1926	963,692	508,564	43,548	75,006	185,997	-	150,537
1927	504,585	401,747	11,112	28,428	5,792	-	57,506
1928	314,594	252,731	6,158	11,209	949	-	43,547
1929	261,771	136,803	21,725	32,572	14,191	-	56,480
1930	221,870	54,777	45,722	19,879	59,122	9,180	33,190
5-year average	453,302	270,924	25,661	33,419	53,210	1,836	68,252
1931	120,508	2,745	44,500	1,127	179	22,448	49,509
1932	91,711	1,134	45,039	-	693	23,861	20,984
1933	37,005	-	5,163	-	687	22,649	8,506
1934	27,053	434	15,965	-	480	4,486	5,688
1935	30,642	526	17,694	38	577	225	11,582
5-year average	61,384	968	25,672	233	523	14,734	19,254
1936	6,413	289	-	-	-	19	6,124
1937	542,192	89	-	115	-	19 ^{1/}	541,988
1938	383,454	321	-	1,294	13	8,013 ^{2/}	373,813

^{1/} Includes 298,932 barrels from Czechoslovakia and 240,687 barrels from Hungary.

^{2/} Includes 263,840 barrels from Czechoslovakia, 81,015 barrels from Yugoslavia and 25,907 barrels from Hungary.

The Netherlands

Imports of wheat flour into the Netherlands averaged 1,723,723 barrels during the five years 1926-30, but began to decline the following year and by the end of the next five-year period (1931-35) had dropped to 610,136 barrels. An upward trend was shown in the ensuing three years and the total for 1938 was 150,000 barrels higher than this latter average.

British Empire contributions showed an increased percentage in the second five-year period but the Canadian share was somewhat lower and continued to decrease in the last three years under survey. The United Kingdom and Australia derived greater benefit from the increase in 1936 and the latter shows a steady rise in exports while amounts from the former are decreasing less rapidly than those from Canada.

By far the greater part of the Netherlands imports was supplied by foreign countries, the United States maintaining a considerable lead except during the years 1932-35 when France increased their exports to some extent. This was not, however, of sufficient magnitude to deprive the United States of first place in the average for 1931-35, which position they still occupy. In the first five-year period (1926-30), Belgium-Luxemburg held second rank as foreign exporters but dropped to fourth in the second period. Lately, with the falling off of Germany's contributions, Belgian exports are mounting again.

Milling Industry

The most recent official report on the Netherlands milling industry showed that at the close of the year 1938 there were nineteen commercial flour mills located in various parts of the country, which, during the preceding twelve months, ground 816,745 metric tons (9,186,829 bushels) of wheat, of which 282,560 tons (3,178,263 barrels) were of domestic origin. The total flour production amounted to 640,858 metric tons (7,208,435 barrels).

The population of the Netherlands is 8,470,000 and the consumption is estimated at 4.6 bushels per capita.

According to the Trade Returns of the Netherlands, the sources of the imports were as follows:-

<u>Calendar Year</u>	<u>Total Imports</u>	<u>British Empire Imports</u>	<u>Canada</u> (Barrels)	<u>United Kingdom</u>	<u>Australia</u>
1926	1,596,673	62,939	43,492	13,426	6,021
1927	1,853,607	53,248	22,815	15,293	15,140
1928	1,964,011	192,925	155,127	28,426	9,372
1929	1,407,743	125,132	87,898	32,290	4,944
1930	1,796,582	127,867	67,010	31,455	29,402
5-year average	1,723,723	112,422	75,268	24,178	12,976
1931	1,288,746	120,581	70,498	30,102	19,981
1932	351,685	43,345	16,987	11,534	14,824
1933	505,619	92,458	56,512	13,891	22,055
1934	437,619	50,591	32,651	15,913	2,027
1935	467,010	80,380	43,755	25,466	11,159
5-year average	610,136	77,471	44,081	19,381	14,009
1936	704,591	129,069	45,673	51,013	32,383
1937	727,827	108,683	13,006	39,114	56,563
1938	761,695	126,775	6,278	27,485	93,012

<u>Calendar Year</u>	<u>Foreign Imports</u>	<u>Argentina</u>	<u>United States</u>	<u>Belgium- Luxemburg</u> (Barrels)	<u>France</u>	<u>Germany</u>	<u>Other Foreign Countries</u>
1926	1,533,734	12,306	1,160,337	271,122	30,065	54,194	5,710
1927	1,800,359	24,146	1,541,888	201,122	16,308	14,882	2,013
1928	1,771,086	18,943	1,374,925	309,783	38,851	27,301	1,283
1929	1,282,611	7,338	975,159	206,794	55,831	32,016	5,473
1930	1,668,715	4,112	1,400,818	65,615	155,793	31,573	10,304
5-year average	1,611,301	13,369	1,290,625	210,887	59,370	31,993	5,057
1931	1,168,165	2,791	730,243	70,168	345,901	10,764	8,298
1932	308,340	2,934	138,860	15,560	141,147	6,464	3,375
1933	413,161	-	129,077	4,830	165,780	56,872	56,602
1934	387,028	-	81,015	2,550	185,990	61,336	56,137
1935	386,630	-	100,831	5,753	185,912	7,513	86,621
5-year average	532,665	1,145	236,005	19,772	204,946	28,590	42,207
1936	575,522	4,506	286,910	4,605	115,554	875	163,072
1937	619,144	21,644	439,381	17,589	91,483	589	48,458
1938	634,920	17,544	491,943	25,219	88,827	731	10,656

Note: The present monopoly tax on wheat flour is 7 florin per 100 kilos (\$4.12 per 220 pounds).

Norway

The thirteen years of the present survey show considerable change in the flour trade of Norway. For the first three years imports were increasing, but from then on there was a more or less steady decline until 1938. British Empire imports rose fairly steadily, however, notably those from Canada which became the chief source of supply in 1931 and has maintained this position ever since. Previously, the United States was shown as principal contributor but it is quite probable that much of the flour reputedly exported from there was of Canadian origin. In recent years Norwegian vessels have been proceeding to the Head of the Lakes and taking cargoes direct from Fort William and Port Arthur to their home ports.

The reduction of the average imports from 758,416 barrels during 1926-30 to 575,577 barrels during the next five-year period (1931-35) was more than offset by the increase in the quantity of flour milled in Norway. However, a definite decrease in flour consumption has been noticed since 1936.

Handling of Flour

Imported flour is handled in the same way as imported wheat. It is inspected at the port of entry and taken over by specified wholesale houses which are under contract with the Norwegian State Grain Monopoly to distribute it at their own risk against certain compensation. The selling price of each type of flour is the same all over the country, freight charges being equalized by the Monopoly. Changes in prices are telegraphed to all mills and wholesale dealers and put into effect simultaneously in all parts of the country.

The activities of the Monopoly have, in large measure, deprived private firms of their commercial independence, nevertheless the mills, flour importers and agents are still able to carry on their business on comparatively satisfactory terms in cooperation with the Monopoly. Private importers of feeding stuffs are still permitted to import necessary quantities of mill-feed under special license, issued by the Monopoly.

Norwegian Mills

According to the Norwegian Grain Monopoly, there are 968 mills in Norway, represented by 211 milling concerns. Of the milling concerns which operate on a commercial basis, there are 16 which grind approximately 90% of all the flour milled in Norway. The commercial mills operated almost entirely on foreign wheat, whereas the small mills usually grind only domestic grains.

The population of Norway is stated as 2,880,000 and the estimated per capita consumption is 3.5 bushels.

According to the Trade Returns of Norway, the sources of the imports were as follows:-

<u>Calendar Year</u>	<u>Total Imports</u>	<u>British Empire Imports</u> (Barrels)	<u>Canada</u>	<u>United Kingdom</u>
1926	662,921	98,730	57,821	40,909
1927	779,070	144,947	58,312	86,635
1928	810,429	250,621	88,481	162,140
1929	806,475	275,395	126,702	148,693
1930	733,182	258,434	242,978	15,456
5-year average	758,416	205,626	114,859	90,767
1931	776,960	335,153	290,778	44,375
1932	544,477	310,954	134,199	126,755
1933	566,470	375,991	213,298	162,693
1934	504,871	340,548	198,563	141,985
1935	485,108	346,486	238,392	108,094
5-year average	575,577	341,826	225,046	116,780
1936	438,935	303,182	224,962	78,220
1937	360,805	208,428	157,350	51,078
1938	461,060	342,088	297,613	44,475

<u>Calendar Year</u>	<u>Foreign Imports</u>	<u>United States</u> (Barrels)	<u>France</u>	<u>Other Countries</u>
1926	564,191	547,962	1,509	14,720
1927	634,123	613,169	-	20,954
1928	559,808	535,918	717	23,173
1929	531,080	478,467	12,452	40,161
1930	474,748	360,881	91,693	22,174
5-year average	552,790	507,279	21,274	24,237
1931	441,807	271,246	155,530	15,031
1932	233,523	153,941	65,723	13,859
1933	190,479	89,501	63,529	37,449
1934	164,323	87,285	72,595	4,443
1935	138,622	47,298	68,096	23,228
5-year average	233,751	129,854	85,096	18,802
1936	135,753	56,972	51,977	26,804
1937	152,377	55,892	53,406	43,079
1938	118,972	65,441	36,174	17,357

Denmark

According to the five-year average for 1926-30, wheat flour imports into Denmark averaged 766,622 barrels, the greater part of which came from the United States. Canada was the second largest contributor but supplied little more than one-quarter of the total. In the second five-year period (1931-35) British Empire countries took the lead, the United Kingdom this time forwarding over two-fifths of the average import, while contributions from the United States were less than one-third and rapidly diminishing. Sharp decreases were shown in 1936 and 1937, and the increase in 1938 brought that year's total to very little over fifty per cent of the second average, but the proportion coming from the United Kingdom continued to mount.

Milling

The decline in imports has been compensated to a great extent by increased production in Danish mills. The policy of issuing licenses for flour imports has reacted in favour of the domestic milling industry and Denmark is now practically self-sufficient in the matter of flour. There is no estimate available regarding the capacity of Danish mills but there are about 29 large mills in the country.

The population of Denmark is placed at 3,730,000 and the estimate consumption is 6.0 per capita in 1937.

<u>Calendar Year</u>	<u>Total Imports</u>	<u>British Empire Imports</u> (Barrels)	<u>Canada</u>	<u>United Kingdom</u>
1926	639,728	212,856	212,856	-
1927	745,877	191,689	190,678	1,011
1928	396,939	281,298	277,988	3,310
1929	749,448	173,703	172,084	1,619
1930	801,120	146,255	144,755	1,500
5-year average	766,622	201,160	199,672	1,488
1931	764,357	175,937	159,202	16,735
1932	493,726	304,955	103,147	201,808
1933	401,919	355,871	90,343	265,028
1934	246,788	222,111	49,560	172,551
1935	176,514	174,053	6,579	167,474
5-year average	416,761	246,585	81,866	164,719
1936	94,783	93,739	492	93,247
1937	95,123	94,616	278	94,338
1938	223,117	220,519	202	220,317

<u>Calendar Year</u>	<u>Foreign Imports</u>	<u>United States</u>	<u>Germany</u>	<u>Sweden</u>	<u>France</u>	<u>Other Countries</u>
			(Barrels)			
1926	426,872	310,072	8,034	95,372	-	12,894
1927	554,188	466,644	28,482	46,220	-	12,842
1928	615,641	500,044	42,076	66,448	-	7,073
1929	575,745	490,305	25,420	53,965	-	6,055
1930	654,865	579,611	29,865	21,161	-	24,228
5-year average ..	565,462	469,335	26,775	56,733	-	12,619
1931	588,920	487,179	28,820	1,977	-	70,944
1932	188,771	135,336	6,762	1,274	-	45,399
1933	46,048	13,929	13,907	-	11,816	6,396
1934	24,677	9,007	13,618	96	1,620	336
1935	2,461	1,044	385	-	875	157
5-year average ..	170,176	129,299	12,698	670	2,862	24,647
1936	1,044	669	232	38	4	101
1937	507	220	225	-	37	25
1938	2,598	1,159	-	-	1,428	11

Finland

Finland was one of the largest importers of wheat flour during the five years 1926-30, with an average importation of 1,177,753 barrels. By the end of the next period (1931-35) the average had receded to less than one-half of this amount, and during the next three years the respective totals were little more than half of the latter average.

Until 1930 the United States was the largest single contributor but since then the United Kingdom has been supplying more than fifty per cent of Finnish flour imports. Canadian exports of wheat flour to Finland have never been very great but continue to maintain a fairly consistent percentage of the total imported. In 1936 and 1937, Hungary was second largest supplier but has since dropped back to an almost negligible position.

Mills

According to the Northwestern Millers' Almanac, 1939, there are very few flour mills in Finland and most of these country mills are equipped only for producing rye flour and meal. However, the recent imposition of higher tariffs and the large differential between import duties on flour and on grain, have given a new impetus to the flour milling industry. Existing mills are being adapted to wheat grinding.

The population of Finland is 3,800,000 and the per capita consumption was estimated at 2.4 bushels of wheat in 1937.

<u>Calendar Year</u>	<u>Total Imports</u>	<u>British Empire Imports</u> (Barrels)	<u>Canada</u>	<u>United Kingdom</u>
1926	923,382	222,659	48,307	174,352
1927	933,335	329,862	37,396	292,466
1928	1,448,815	547,661	126,489	421,172
1929	1,466,455	555,155	126,530	428,625
1930	1,116,778	469,519	126,291	343,228
5-year average	1,177,753	424,971	93,003	331,968
1931	874,749	432,622	84,381	348,241
1932	577,443	375,163	40,655	334,508
1933	536,100	373,167	29,234	343,933
1934	477,236	315,951	25,456	290,495
1935	357,109	282,840	27,039	255,801
5-year average	564,528	355,949	41,353	314,596
1936	293,915	215,548	25,163	190,385
1937	234,559	152,381	17,737	134,644
1938	336,539	302,715	20,709	282,006

<u>Calendar Year</u>	<u>Foreign Imports</u>	<u>United States</u>	<u>Germany</u>	<u>France</u> (Barrels)	<u>Hungary</u>	<u>1/Other Countries</u>
1926	700,723	572,003	33,211	51,462	-	44,047
1927	603,473	519,885	30,598	22,031	-	30,959
1928	901,154	794,973	53,042	32,630	751	29,758
1929	911,300	630,653	77,983	108,575	61,424	32,765
1930	647,259	477,883	42,613	91,481	10,451	24,826
5-year average.	752,782	597,079	47,471	61,236	14,525	32,471
1931	442,127	276,641	29,930	76,234	17,998	41,324
1932	202,280	85,580	22,500	27,694	2,689	63,817
1933	162,933	39,071	53,503	38,304	17,556	14,499
1934	161,285	25,248	75,129	18,646	14,051	28,211
1935	74,269	16,711	34,784	7,055	11,394	4,325
5-year average.	208,579	88,650	43,169	33,587	12,738	30,435
1936	78,367	10,335	1,470	857	62,100	3,605
1937	82,178	11,652	-	-	69,123	1,403
1938	33,824	21,504	-	-	11,985	335

1/ Includes Other British Countries.

France

Unlike wheat, imports of which were comparatively large, wheat flour from foreign countries was not in great demand in France in the earlier years of our survey. In 1934, however, there was a sharp rise of more than fifty per cent in the quantity imported. Since then the amount has decreased somewhat but is still greater than twice the average for the first five-year period (1926-30).

Without exception, the bulk of the total import each year came from other than British Empire Countries, Algeria being always the largest contributor. Except in the two first years under review, another French colony, Tunis, supplied the second largest amount, and at present these countries might be said to have almost a monopoly on the French import trade in wheat flour.

Canada was the only exporter among Empire countries and the amounts supplied, never great, have ceased entirely since 1935.

The importation of wheat flour into France is practically prohibited, and millers may import strengthening wheats only if they can show that they export equivalent amounts of wheat or its derivatives.

On November 23, 1937, a decree was published incorporating into the original law the amendments which had been made from time to time since it was passed. Among the most important of these was one fixing a milling tax on a new scale, whereby all mills delivering over 300 metric tons of flour or semolinas pay a certain tax per ton. Millers are to pay also a license tax, amounting to 5,400 francs for those milling over 5,000 tons annually. Another important change, agreed upon by referendum, is a milling quota, beginning June 27, 1938 as follows: No mill is allowed to produce in any one year more than its average yearly production from 1927 to 1935 plus one-half its total productive capacity for 300 days.

Mills

According to official statistics published in 1931, the number of mills in France was as follows:-

Roller mills	5,482
Stone-buhr mills	2,459
Small wind or water-power mills..	<u>10,444</u>
Total	18,385

Probably most of the mills in the last two groups are of an obsolete character, operating on a strictly custom or grist grinding basis. Under these circumstances they are not important from the standpoint of commercial production.

The population of France is 41,950,000 and the estimated per capita consumption 6.4 bushels of wheat in 1937.

According to French Trade Returns, the sources of the imports were as follows:-

<u>Calendar Year</u>	<u>Total Imports</u> (Barrels)	<u>Canada</u>
1926	227,650	3,445
1927	82,713	20
1928	225,214	471
1929	171,584	2,596
1930	297,444	3,532
5-year average	200,921	2,013
1931	185,239	686
1932	187,600	-
1933	341,227	-
1934	690,194	5,632
1935	651,319	171
5-year average	411,116	1,298
1936	599,199	-
1937	412,310	-
1938	464,928 (preliminary)	-

<u>Calendar Year</u>	<u>Foreign Imports</u>	<u>Algeria</u>	<u>Tunis</u> (Barrels)	<u>Argentina</u>	<u>United States</u>	<u>Other Countries</u>
1926	224,205	35,361	7,829	20,094	26,737	134,184
1927	82,693	35,432	3,517	8,724	9,811	25,209
1928	224,743	155,637	23,204	16,329	4,510	25,063
1929	168,988	103,839	20,875	2,013	4,126	38,135
1930	293,912	212,011	60,402	-	4,063	17,436
5-year average	198,908	108,456	23,165	9,432	9,849	48,006
1931	184,553	99,820	56,083	63	6,375	22,212
1932	187,600	135,795	33,626	2,265	4,098	11,816
1933	341,227	280,050	48,320	-	-	12,857
1934	684,562	436,154	240,690	-	-	7,718
1935	651,148	426,185	212,001	-	6,616	6,346
5-year average	409,818	275,601	118,144	465	3,418	12,190
1936	599,199	391,555	191,978	-	8,392	7,274
1937	412,310	263,090	131,569	4,819	9,934	2,898
1938	464,928	301,068	149,028	4,941	5,859	4,032

Czechoslovakia

Until 1930 Czechoslovakia imported large quantities of wheat flour, the average for the five-year period 1926-30 being 2,077,466 barrels. Very little of this came from the British Empire; the free city of Hamburg and Hungary were the largest single sources of supply. In the ensuing five years the average dropped to 179,226 barrels and Canada was the chief contributor. The subsequent decline has been great and steady, imports in 1936 and 1937 being insignificant. Complete data for 1938 were not available before the absorption of the country by Germany, but the figures for the first eight months show 6,119 barrels were imported.

During the twelve years here reviewed a total reversal of conditions has taken place in Czechoslovakia's position in the world flour market. Instead of being an importer, this country now exports small quantities of this commodity and also produces bread cereals sufficient for domestic consumption.

Milling Industry

Czechoslovakia has a well established and adequate flour-milling industry, which, at December 16, 1937 was reported to be working to only 40 per cent of capacity despite its monopoly of the home market for flour.

According to an official report covering the working year 1935-36, there was, during that period, a total of 9,102 mills in operation, which ground 1,207,330 metric tons or 44,361,047 bushels of wheat. The majority of the milling establishments were small. Of the total number, 7,591 were classified as farm mills, which ground 312,820 tons or 11,493,977 bushels of wheat. There were 1,136 mixed mills which ground partly for farmers and partly for commercial purposes. These handled 250,180 tons or 9,192,389 bushels of wheat. There were also larger commercial mills, which milled 644,300 tons or 23,673,579 bushels of wheat. Among these mills, only seven have a daily capacity of more than 100 tons or 3,674 bushels per day of wheat and rye. Twenty-six have a capacity of from 50 to 100 tons or 1,837 to 3,674 bushels and forty-two of from 20 to 50 tons or 735 to 1,837 bushels.

Czechoslovakia had a grain monopoly which was founded by a Government decree of July, 1934. It was vested with the sole right to export, import and trade in wheat and other cereals and flour, and also the more important foodstuffs. This organization sets fixed prices which apply to producers, millers and consumers.

The population of Czechoslovakia was placed at 15,100,000 with an estimated per capita consumption of 3.4 bushels of wheat in 1937.

According to the Trade Returns of Czechoslovakia, the sources of the imports of wheat flour were as follows:-

<u>Calendar Year</u>	<u>Total Imports</u>	<u>British Empire Imports</u>	<u>Canada</u>	<u>United Kingdom</u>
		(Barrels)		
1926	2,464,003	104,975	93,888	11,087
1927	1,968,719	187,187	178,380	8,807
1928	1,969,585	233,449	231,619	1,830
1929	1,842,515	216,485	215,844	641
1930	2,142,510	160,041	160,041	-
5-year average	2,077,466	180,427	175,954	4,473
1931	306,242	50,873	50,873	-
1932	407,134	188,876	188,876	-
1933	163,960	107,592	107,592	-
1934	10,065	4,541	4,541	-
1935	8,728	2,729	2,729	-
5-year average	179,226	70,922	70,922	-
1936	12,087	4,162	4,162	-
1937	2,457	-	-	-
1938 (8 mos.)	6,119	Distribution by countries not available.		

<u>Calendar Year</u>	<u>Foreign Imports</u>	<u>Hamburg</u>	<u>Hungary</u>	<u>Roumania</u>	<u>United States</u>	<u>Yugo- slavia</u>	<u>Other Foreign Countries</u>
				(Barrels)			
1926	2,359,028	833,948	570,183	385,499	96,787	117,479	355,132
1927	1,781,532	759,973	587,039	144,085	53,856	39,527	197,052
1928	1,736,136	745,472	724,860	90,165	47,155	7,401	121,083
1929	1,626,030	571,727	818,125	26,883	71,157	3,876	134,262
1930	1,982,469	890,365	885,224	39,886	46,103	7,197	113,694
5-year average..	1,897,039	760,297	717,086	137,304	63,012	35,096	184,244
1931	255,369	189,181	1,047	26,209	1,681	10,302	26,949
1932	218,258	62,392	74,899	61,387	1,509	6,299	11,772
1933	56,368	6,410	37,674	12	223	35	12,014
1934	5,524	-	3,032	-	-	512	1,980
1935	5,999	513	1,477	33	1,251	1	2,724
5-year average..	108,304	51,699	23,626	17,528	933	3,430	11,088
1936	7,925	-	1,949	39	3,673	1,147	1,157
1937	2,457	-	705	8	455	574	715
1938							

Distribution by countries not available.

Austria

Austria's imports of wheat flour averaged 1,632,218 barrels during the five-year period 1926-30, but were reduced to 623,446 barrels in the following five years (1931-35). The next three years (1936 to 1938) showed further reductions, to less than one-half of the average for the previous period. Practically all the imports came from other than British Empire countries even before 1934, and in that year there was a complete cessation of British wheat flour entering the Austrian market. The chief contributor throughout was Hungary and the only other country to continue consistently to send even small amounts was Yugoslavia.

Austria was absorbed by Germany, March 13, 1938.

Austria had a population of 6,760,000 with an estimated per capita consumption of 3.5 bushels of wheat in 1937.

According to the Trade Returns of Austria, the sources of the imports were as follows:-

Calendar Year	Total Imports	(Barrels)		Canada			
1926	1,632,882			46,654			
1927	1,808,658			85,555			
1928	1,356,631			72,433			
1929	1,617,048			37,663			
1930	1,745,872			157,524			
5-year average	1,632,218			79,966			
1931	1,319,322			68,496			
1932	543,505			1,017			
1933	325,305			1,132			
1934	448,278			-			
1935	480,820			-			
5-year average	623,446			14,129			
1936	300,058			-			
1937	226,438			-			
1938	171,897			-			

Calendar Year	Foreign Imports	Hungary	Roumania	United States	Yugo- slavia	Other Foreign Countries
			(Barrels)			
1926	1,586,228	812,352	283,956	147,333	187,445	155,142
1927	1,723,103	934,952	442,985	142,086	148,078	55,002
1928	1,284,198	891,105	180,847	117,529	39,158	55,559
1929	1,579,385	1,391,905	53,554	67,358	38,316	28,252
1930	1,588,348	1,246,517	116,104	119,375	58,510	47,842
5-year average ...	1,552,252	1,055,366	215,489	118,736	94,302	68,359
1931	1,250,826	915,626	91,825	132,641	13,149	97,585
1932	542,488	525,682	1,760	5,462	3,143	6,441
1933	324,173	287,699	-	1,453	2,817	32,204
1934	448,278	417,574	-	-	6,874	23,830
1935	480,820	473,152	-	-	4,769	2,899
5-year average ...	609,317	523,947	18,717	27,911	6,150	32,592
1936	300,058	292,002	-	-	5,476	2,580
1937	226,438	218,407	-	-	5,602	2,429
1938	171,897	167,725	-	-	3,020	1,152

Greece

Over the five-year period 1926-30, the average importation of wheat flour into Greece was 697,095 barrels. Most of this came from countries outside the British Empire, the United States alone supplying more than fifty per cent. Bulgaria ranked second but its contributions had dwindled to a negligible amount by the end of this term. Italy and France share more or less equally as lesser sources of supply, great fluctuations occurring in the amounts from both countries.

In the ensuing five years the total import receded rapidly. The average was 21,731 barrels and British Empire imports had ceased entirely after the first two years. The United States continued to ship about the same percentage and was, in fact, the only noteworthy contributor. The 1936 and 1937 totals were less than one-half the preceding average and even a considerable increase in 1938 did not indicate a probable return to the former scale of importation.

The following quotation from the Commercial Intelligence Journal of January 13, 1940 will show the present state of the wheat flour trade of Greece:

Flour Mills

"The total number of flour mills in Greece is about 150. The more important mills are located at seaports rather than in the districts of production. Small mills are scattered throughout the country but many of these are either water-driven or employ small mechanical motive power. The estimated productions of Greek flour mills in 1936 and 1937 respectively, were 1,017,450 tons (11,444,379 barrels) of flour and 179,550 tons of bran, and 881,875 tons (9,919,418 barrels) of flour and 156,625 tons of bran. All flour mills are operated under private ownership, some of the more important being limited liability companies."

Greece has a population of 6,750,000 with an estimated per capita consumption of 5.7 bushels of wheat in 1937.

According to Grecian Trade Returns, the imports of wheat flour were as follows:-

<u>Calendar Year</u>	<u>Total Imports</u>	<u>British Empire Imports</u> (Barrels)	<u>Australia</u>	<u>Canada</u>
1926	1,670,287	124,922	94,023	30,899
1927	750,834	143,977	64,104	79,873
1928	552,553	83,720	42,023	41,697
1929	351,189	41,438	27,479	13,959
1930	160,610	10,314	10,112	202
5-year average	697,095	80,874	47,548	33,326
1931	60,323	11,653	8,672	2,981
1932	16,609	1,202	234	968
1933	7,687	-	-	-
1934	9,831	-	-	-
1935	14,206	-	-	-
5-year average	21,731	2,571	1,781	790
1936	9,426	-	-	-
1937	9,133	-	-	-
1938	14,611	-	-	-

<u>Calendar Year</u>	<u>Foreign Imports</u>	<u>United States</u>	<u>Bulgaria</u> (Barrels)	<u>Italy</u>	<u>France</u>	<u>Other Foreign Countries</u>
1926	1,545,365	825,633	354,225	108,747	78,039	178,721
1927	606,857	441,949	96,734	4,117	3,948	60,109
1928	468,853	398,486	28,458	1,024	16,231	24,634
1929	309,751	235,288	2,171	34,667	6,614	31,011
1930	150,296	97,521	832	17,873	11,529	22,541
5-year average.	616,221	399,776	96,484	33,286	23,272	63,403
1931	48,670	30,347	79	2,137	8,571	7,536
1932	15,407	6,575	-	1,379	2,737	4,716
1933	7,687	3,794	-	2,492	1,079	322
1934	9,831	7,604	-	1,867	214	146
1935	14,206	11,034	-	3,172	-	-
5-year average.	19,160	11,871	16	2,209	2,520	2,544
1936	9,426	9,426	-	-	-	-
1937	9,133	8,470	-	-	-	663
1938	14,611	14,499	-	-	-	112

Netherlands East Indies

The Netherlands East Indies possessions consist of the larger islands of Madura and Java and several smaller ones, also parts of the islands of Borneo and New Guinea. Imports of wheat flour into these colonies have increased almost steadily since 1926. During the five-year period 1926-30 the average was 797,896 barrels and at the end of the second period (1931-35) it was 859,302 barrels. This latter period had included two years of much heavier importing, however, and the following totals showed a drop, but 1938 brought the average up almost to the higher level again.

By far the greatest part of the wheat flour imported into Netherlands East Indies comes from Australia, with Canada as second largest contributor, having supplanted Japan in this regard since 1932. Amounts supplied by the Netherlands, China, and the United States are practically negligible.

According to the Trade Returns of Netherlands East Indies, the sources of the imports were as follows:-

<u>Calendar Year</u>	<u>Total Imports</u>	<u>Total from British Empire</u>	<u>Canada</u>	<u>Australia</u>	<u>Singapore</u>
(Barrels)					
1926	693,149	634,776	-	605,227	23,603
1927	736,767	701,141	-	674,956	25,529
1928	820,861	780,430	-	752,612	25,043
1929	846,526	803,401	631	777,204	23,425
1930	892,177	853,342	2,133	827,007	18,998
5-year average ...	797,896	754,618	553	727,401	23,319
1931	895,676	872,497	430	853,653	16,650
1932	799,664	792,209	6,081	765,160	18,218
1933	804,479	794,033	11,265	758,892	20,318
1934	878,583	868,864	15,159	810,102	37,130
1935	918,110	909,180	14,773	850,407	35,419
5-year average ...	859,302	847,357	9,542	807,643	25,545
1936	803,439	777,754	15,539	724,134	29,540
1937	862,609	850,472	10,435	799,729	32,013
1938	959,840	957,479	10,333	918,487	23,592

Netherlands East Indies (Concluded)

<u>Calendar Year</u>	<u>Unfederated Malay States</u>	<u>British Malay</u> (Barrels)	<u>Hong Kong</u>	<u>Other British Countries</u>
1926	3,336	107	2,503	-
1927	-	165	126	365
1928	2,197	238	253	87
1929	1,812	263	-	66
1930	1,666	305	3,127	106
5-year average	1,802	216	1,202	125
1931	1,058	437	-	269
1932	1,987	386	-	377
1933	3,168	400	-	-
1934	5,832	402	-	238
1935	7,783	580	-	218
5-year average	3,966	441	-	220
1936	7,132	494	711	204
1937	6,907	351	419	616
1938	4,430	389	-	248

<u>Calendar Year</u>	<u>Total Imports from Foreign Countries</u>	<u>Netherlands</u>	<u>China</u>	<u>Japan</u>	<u>United States</u>	<u>Other Countries</u>
(Barrels)						
1926	58,573	416	20,378	36,427	-	1,152
1927	35,626	1,026	15,664	16,289	-	2,647
1928	40,431	1,116	3,209	23,887	11,961	258
1929	43,125	1,663	3,306	9,936	27,916	304
1930	38,835	1,496	332	14,669	22,058	280
5-year average ..	43,278	1,143	8,578	20,242	12,387	928
1931	23,178	1,106	3,465	11,395	6,874	339
1932	7,455	818	-	4,064	2,070	503
1933	10,446	293	804	7,203	1,542	604
1934	9,718	1,265	-	6,061	1,488	904
1935	8,930	1,107	-	5,819	1,377	627
5-year average ..	11,945	918	854	6,908	2,670	595
1936	25,685	551	9,037	14,174	1,190	733
1937	12,137	577	836	9,257	1,314	153
1938	2,361	1,412	-	-	801	148

French Indo-China

Indo-China consists of the Islands of Annam, Cambodia, Cochinchina, Laos and Tonkin in the Malay Archipelago and the trade returns show the distribution of the imports of wheat flour from the year 1931 only, therefore, only one five-year period can be calculated, viz. 1931-35.

The average import for the five-year period 1931 to 1935 was 139,598 barrels, practically all of which came from British Empire countries. Hong Kong furnished the bulk of the imports. In 1936 and 1937, imports rose to 207,837 and 213,714 barrels respectively. Hong Kong forwarded the greater quantity while increased imports were shown from Australia. Another increase in imports took place in the year 1938 when 272,291 barrels were stated as imported, of which Hong Kong exported 204,449 barrels and Australia 51,919 barrels. The imports from the countries outside the British Empire were quite small, averaging only 5,034 barrels in the five-year period 1931-35, while the last three years 1936-38 imports decreased to a negligible amount.

According to the Trade Returns of French Indo-China, the sources of the imports of wheat flour were as follows:-

<u>Calendar Year</u>	<u>Total Imports</u>	<u>British Empire Imports</u>	<u>Australia</u>	<u>Hong Kong</u>	<u>Other British Countries</u>
			(Barrels)		
1931	206,589	204,421	2,862	201,729	10
1932	184,783	178,077	7,925	169,413	739
1933	172,969	168,538	11,195	156,613	730
1934	182,184	173,106	2,426	170,300	370
1935	201,462	198,677	4,325	194,188	164
5-year average	139,598	134,564	5,711	178,451	402
1936	207,837	204,818	18,224	186,547	47
1937	213,714	212,351	13,614	198,459	278
1938	272,291	270,491	51,919	204,449	14,123

<u>Calendar Year</u>	<u>Foreign Imports</u>	<u>China</u>	<u>France</u>	<u>Japan</u>	<u>Siam</u>	<u>United States</u>	<u>Other Countries</u>
1931	2,168	1,333	746	-	85	1	3
1932	6,706	912	701	1	758	4,331	3
1933	4,431	478	569	1,129	721	1,529	5
1934	9,078	-	2,353	5,908	661	-	156
1935	2,785	336	642	895	631	139	142
5-year average .	5,034	612	1,002	1,587	571	1,200	62
1936	3,019	217	747	1,155	452	296	152
1937	1,363	-	882	285	121	-	75
1938	1,800	-	1,146	-	79	-	575

Venezuela

The distribution of the imports of wheat flour into Venezuela are shown only for the calendar years 1926 to 1935. The average import for the first five-year period was 293,519 barrels and for the second five years 243,188 barrels. This import trade was all with the United States except for a few hundred barrels from the United Kingdom and Canada. As no trade returns are available for 1936 to 1938 the distribution cannot be shown.

According to the International Institute Annual Returns, the total imports for 1936 and 1937 were 238,572 and 279,605 barrels respectively, which, no doubt, came from the United States.

There are about 28 flour mills in Venezuela.

According to Trade Returns of Venezuela, the following countries are the sources of imports:

<u>Calendar</u> <u>Year</u>	<u>Total</u> <u>Imports</u>	<u>United</u> <u>Kingdom</u> (Barrels)	<u>Canada</u>
1926	288,469	-	-
1927	264,634	-	-
1928	315,689	-	-
1929	290,759	-	-
1930	308,047	-	159
5-year average	293,519	-	-
1931	315,262	-	-
1932	244,792	-	-
1933	223,095	1,251	656
1934	218,178	1,000	408
1935	214,614	526	285
5-year average	243,188	-	-
1936	238,572	Not available by countries	
1937	279,065	-	-
1938		Not available	

<u>Calendar</u> <u>Year</u>	<u>United</u> <u>States</u> (Barrels)
1926	286,354
1927	264,015
1928	315,509
1929	290,711
1930	307,611
5-year average	292,840
1931	313,970
1932	-
1933	220,640
1934	215,995
1935	213,043
5-year average	192,698
1936	Not available by countries
1937	Not available by countries
1938	Not available

Manchoukuo

The Trade Returns of Manchoukuo are only available back from the year 1933, although the imports in 1932 are shown as 2,779,968 barrels. The latter figure is taken from the International Institute of Agriculture. During the next three years 1933 to 1935, Manchoukuo imported on an average of over five million barrels of flour. These figures are comparable with those of the United Kingdom in amounts imported. The greater part of these imports came from Japan with Australia and China ranking next in order of quantity exported to that country. In the year 1936, imports decreased to 2,367,358 barrels and in 1937 only 882,153 barrels were imported, but in 1937, imports rose to 2,697,294 barrels. The distribution by countries from which imported was not shown for 1938.

The reduced importation of wheat flour since 1935 is due to efforts put forward to increase production of Agricultural products, wheat being one of those products which showed the results.

Mills

Large Japanese milling companies have flour mills in Manchoukuo with large capacities, the separate figures representing the extent of same are not available.

According to Trade Returns of Manchoukuo, the following countries are the sources of imports:-

<u>Calendar Year</u>	<u>Total Imports</u>	<u>Total British Empire Countries</u>	<u>Canada</u>	<u>Australia</u>	<u>Great Britain</u>	<u>Hong Kong</u>
			(Barrels)			
1932	2,779,968		Not available			
1933	5,692,355	466,670	6,259	460,411	-	-
1934	5,881,988	1,860,772	-	1,860,720	52	-
1935	5,233,816	1,930,105	340	1,929,764	-	1
1936	2,367,358	807,577	1,493	806,034	-	50
1937	882,153	100,221	996	99,225	-	-
1938	2,697,294	Not available by countries				

<u>Calendar Year</u>	<u>Total Foreign Imports</u>	<u>Japan</u>	<u>Korea</u>	<u>China</u>	<u>United States</u>	<u>Other Countries</u>
			(Barrels)			
1933	5,225,685	3,144,779	128,789	1,883,556	57,798	10,763
1934	4,021,216	2,919,953	133,592	853,324	114,347	-
1935	3,303,711	3,130,563	62,764	54,620	4,764	1,000
1936	1,559,781	1,263,724	28,587	259,383	8,087	-
1937	781,932	745,634	14,304	15,003	6,991	-
1938		Not available by countries				

Cuba

The records of the distribution of the imports of wheat flour into Cuba are incomplete. The imports for the calendar years 1926 and 1930 are missing, with the result only the three-year average can be shown for our first period under review. This amounted to 1,268,940 barrels. During the next period 1931-35 the five-year average import was 911,093 barrels but, in the three years following, substantial increases are shown in the total imports.

The United States supplied practically the whole of these imports, while Canada alone forwarded some significant amounts for the period 1926 to 1935. In the years 1936 to 1938 Canada's exports to Cuba have receded to very small amounts.

According to the Commercial Intelligence Journal of November 25, 1939, C. S. Bissett reported Cuba's average consumption of wheat flour is a little over a million barrels a year. All wheat flour consumed in Cuba is imported, as no wheat is grown and there are no flour mills in the country.

As stated, the United States is the chief supplier of flour because Cuba's customs tariff allows a substantial preference for American flour and the mills in that country have concentrated in supplying the exact type of hard wheat flour required by Cuban bakery conditions.

Imports of Wheat flour into Cuba, showing the sources of such imports for the period 1927 to 1938 were as follows:-

Calendar Year	Total Imports	Total British Imports (Barrels)	Canada	United Kingdom
1927	1,301,045	37,839	37,839	-
1928	1,245,409	29,686	29,686	-
1929	1,260,367	18,117	18,117	-
1930		Not available		
3-year average	1,268,940	28,547	28,547	-
1931	933,147	14,595	14,595	-
1932	850,506	44,204	44,204	-
1933	798,532	51,108	51,108	-
1934	945,367	40,429	40,429	-
1935	1,027,913	15,274	10,801	4,473
5-year average	911,093	33,122	32,227	895
1936	1,002,462	2,152	256	1,896
1937	1,056,363	-	-	-
1938	1,026,239	1,253	1,253	-

Calendar Year	Total Foreign Imports	United States (Barrels)	Chile	France	Other Countries
1927	1,263,206	1,263,206	-	-	-
1928	1,215,723	1,215,717	-	-	6
1929	1,242,250	1,241,970	255	-	25
1930		Not available			
3-year average	1,240,393	1,240,298	85	-	10
1931	918,552	918,552	-	-	-
1932	806,302	806,302	-	-	-
1933	747,424	747,144	-	-	280
1934	904,938	900,750	2,314	227	1,647
1935	1,012,639	1,011,276	26	1,077	260
5-year average	877,971	876,805	468	261	437
1936	1,000,310	999,024	111	1,175	-
1937	1,056,363	1,055,969	-	-	394
1938	1,024,986	1,024,980	-	-	6

Philippine Islands

Imports of wheat flour into the Philippines remained fairly stable over the period from 1926 to 1935. The five-year average import from 1926 to 1931 was 806,510 barrels and for the next five years amounted to 806,805 barrels. In 1936, imports rose to 1,030,944 barrels and in 1937, a reduction is shown, the amount imported was 846,842 barrels.

About two-thirds of these imports came from countries outside of the British Empire. The United States contributed the greatest part, while insignificant amounts were received from China and Japan. British Empire countries contributing were Canada and Australia.

Imports of wheat flour into the Philippine Islands. According to the Annual Report of the Insular Collector of Customs, the sources of the imports were as follows:-

Calendar Year	Total Imports	British Empire Countries	Canada (Barrels)	British East Indies	Australia	Other British Countries
1926	753,690	200,563	9,764	70	190,729	-
1927	759,119	103,152	25,351	73	77,728	-
1928	853,520	114,288	39,923	64	74,301	-
1929	872,797	133,007	31,880	61	101,066	-
1930	793,426	97,403	24,592	57	72,754	-
5-year average.	806,510	129,683	26,302	65	103,316	-
1931	888,749	147,837	44,358	75	103,402	2
1932	778,646	197,962	76,139	107	121,716	-
1933	780,416	230,258	101,290	22	128,946	-
1934	782,494	221,856	105,792	41	116,023	-
1935	803,719	450,474	135,023	9	315,442	-
5-year average.	806,805	249,677	92,520	51	157,106	-
1936	1,030,944	594,946	207,363	38	387,545	-
1937	846,842	470,242	149,467	44	320,727	4
1938	1,040,112	Figures not available by countries				

Calendar Year	Total Foreign Countries	United States	China (Barrels)	Japan	Germany	Other Foreign Countries
1926	553,127	552,396	730	1	-	-
1927	655,967	655,708	258	1	-	-
1928	739,232	739,030	191	10	1	-
1929	739,790	739,537	200	52	-	1
1930	696,023	695,620	361	42	-	-
5-year average.	676,827	676,458	348	21	-	-
1931	740,912	738,964	1,065	882	-	1
1932	580,884	575,595	1,448	3,639	1	1
1933	550,158	530,349	5,700	14,108	1	-
1934	560,638	511,007	9,853	39,777	-	1
1935	353,245	277,047	5,842	70,354	-	2
5-year average.	557,128	526,592	4,782	25,753	-	1
1936	435,998	333,158	4,111	98,728	-	1
1937	376,600	303,609	8,439	64,450	-	102
1938	Figures not available by countries					

Haiti

The average import of wheat flour into Haiti was 321,856 barrels for the five years 1926-30, compared with 176,900 barrels for the period 1931-35. In 1936, imports receded to 133,785 barrels, and in 1937 and 1938 a further recession took place to 119,061, and 86,160 barrels, according to International Institute figures.

The total import of wheat flour is practically supplied by the United States millers. Canada is the only other country which receives an appreciable share of the business.

The imports shown from Canada, do not represent a true figure as they only cover the amounts shipped from Canadian ports, while those routed through United States ports are shown as of United States origin. In addition, flour made from Canadian wheat in bond in the United States is also credited to the United States.

Imports of wheat flour into Haiti, according to the Foreign Trade Series, show the sources of imports as follows:-

Calendar Year	Total Imports	Total British Empire Countries (Barrels)	Canada
1926	315,532	-	-
1927	281,856	-	-
1928	367,335	-	-
1929	420,986	-	-
1930	223,570	-	-
5-year average	321,856	-	-
1931	264,681	-	-
1932	224,302	-	-
1933	127,811	-	-
1934	146,547	-	-
1935	121,358	-	-
5-year average	176,900	-	-
1936	133,785	11,834	11,834
1937	119,061	3,288	3,288
1938	86,160	Not available by countries	

Calendar Year	Total Foreign Imports	United States (Barrels)	Other Foreign Countries
1926	315,532	315,457	75
1927	281,856	281,856	-
1928	367,335	367,335	-
1929	420,986	420,985	-
1930	223,570	223,570	-
5-year average	321,856	321,841	15
1931	264,681	264,500	181
1932	224,302	224,302	-
1933	127,811	123,549	4,262
1934	146,547	129,454	16,913
1935	121,358	106,807	14,571
5-year average	176,900	189,755	7,145
1936	121,951	121,800	151
1937	115,773	115,573	200
1938		Not available by countries	

Puerto Rico

According to Puerto Rican Trade Returns, a record of the imports of wheat flour is incomplete and being on a fiscal year basis, are different from those published by the International Institute, which are for the calendar year.

The trade returns show all the wheat flour imported into the Island originated in the United States. The International Institute returns show the imports averaged 419,124 barrels during the first five-year period 1926 to 1930, which was slightly reduced to 389,972 barrels in the last five years. In the last three years imports were well over the first five-year period.

There are no wheat flour mills in any part of the country. For further details of this trade see the Commercial Intelligence Journal of December 2, 1939.

Formosa

The Trade Returns of Formosa do not show in detail the sources of the imports of wheat flour separately. Any data that has been compiled indicates that China is the chief country supplying Formosa. The average total imports from all countries for the five-year period 1926 to 1930 were 189,358 barrels, which was increased to 239,382 barrels in the next five years, 1931 to 1935. Further increases in the import took place in the next three years. Formosa is endeavouring to attain self-sufficiency in wheat production which would have a tendency to reduce wheat flour importation.

Chosen (Korea)

The imports of wheat flour into Chosen are not shown by countries of origin, but the total import is available. According to these figures Chosen's importation of wheat flour during the five years 1931-35 was 419,442 barrels. This average was increased to 462,747 barrels in 1936. Imports in the following two years were reduced to almost half the amount of the previous year's importation.

In Chosen, a plan is in force for increased wheat production covering a twelve-year period from 1931. It is hoped a rapid increase in production will follow and there is no doubt that this will have a tendency to decrease imports.

Two mills of the Chosen flour milling company have, at present, a capacity of 1,500 barrels per day.

Hawaii

According to the import figures published by the International Institute, the average importation of wheat flour during the period from 1926 to 1930 was 137,975 barrels. This amount was increased slightly in the next five-year period, when 148,003 barrels were shown as imported. In 1936 a slight reduction was shown in the imports to 144,538 barrels, but in 1937 imports increased to 180,082 barrels. This is the highest quantity imported during the whole period under review. In 1938, imports increased to 161,185 barrels.

Italian Aegean Islands

Aegean Islands imported in 1929 and 1930, 130,982 and 136,867 barrels of wheat flour respectively. During the next five years the average import was 146,833 barrels. The 1936 imports were 137,902 barrels.

Guatemala

Imports of wheat flour into Guatemala averaged 174,674 barrels during the five years 1926-31, according to the import figures compiled by the International Institute of Rome. In the next five years the average decreased to 146,001 barrels. A reduced importation continued during the following three years.

No figures are available showing the imports by countries since 1926, but up to that year all the wheat flour was imported from the United States.

Bolivia

Bolivia is a small country in South America situated north of Argentina and south-west of Brazil. Bolivia, on an average, imported 252,150 barrels of wheat flour from 1926 to 1930. The average in the next five years was reduced to 51,651 barrels. Increases were shown in the imports for the years 1936 to 1938. These imports originated in the Argentine.

The latest reports show 19 flour mills are located in the Republic of Bolivia.

Syria and Lebanon

Imports of wheat flour into Syria and Lebanon averaged 330,825 barrels during the five-year period 1926 to 1930. In the next five years the average import was 238,145 barrels. The following three years the imports were reduced to trifling amounts. The Governments of these two countries on October 16, 1937, prohibited the exports of wheat on account of the international situation. This prevented increased wheat flour importation.

Syria produces enough flour for its home consumption and a small surplus for export. Lebanon, however, only produces about half the flour required for its internal consumption. The deficiency must be supplied by the importation of wheat for milling purposes.

There are a number of flour mills located in Syria and Lebanon, but the number and capacities are not published.

Libya

(Tripolitania and Cyrenaica)

Tripolitania and Cyrenaica or Italian Libya in North Africa extends along the Mediterranean Sea from Egypt on the east to Tunis (French) on the west.

Tripolitania increased their imports of wheat flour over the period from

Libya (Concluded)

(Tripolitania and Cyrenaica)

1926 to 1937. During the first five-year period, the average import was 124,102 barrels. In the next five years, the average import increased to 315,622 barrels more than double the quantity of the previous five-year period. The import for 1936 was the largest quantity recorded in the last twelve years, when 567,017 barrels were shown as imported. In 1937, imports amounted to 304,261 barrels. The sources of these imports were not shown separately.

Cyrenaica

The imports of wheat flour in Cyrenaica are shown only from the year 1929. The five-year average import for the period 1931 to 1935 was 243,701 barrels. This was increased to 264,105 barrels in 1936 and 156,911 barrels in 1937.

Senegal

Senegal was formerly known as French West Africa. According to the International Institute, the average importation of wheat flour for the five years 1926 to 1930 was 103,499 barrels, compared with 117,700 barrels in the next five-year period 1931-35. Imports for 1936 rose to 143,413 barrels, in 1937 to 167,959 barrels. A decrease is shown in the 1938 imports to 117,093 barrels. This trade is mainly with France.

Tunisia

Tunisia belongs to France and imported an average of 14,587 barrels during the five years 1926 to 1930. During the next five-year period the import averaged 41,506 barrels. The imports for the following years showed increased amounts.

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