

higher than the emergency level, it is still well below any health standard. A summary of the report of the Nutrition Committee is included in the last section of this report.

(2) THE WORLD FOOD BALANCE

It is clear that a critical world food shortage will continue at least until crops are harvested in 1947, even assuming average or somewhat better than average weather for the rest of 1946 and 1947*.

Some increases in production are in prospect for 1946 as compared with 1945 in both continental Europe† and the Far East‡. However, production in continental Europe generally, as well as rice-production in the Far East, will still be well below the pre-war level. The aggregate shortages in these two great areas will exceed the supplies available for shipment from the exporting areas§. Meanwhile, world stocks of food have been seriously depleted in order to meet the current crisis. Thus even though some crop improvement is in prospect, assuming average weather, the incidence of any widespread drought in the months immediately ahead might well be even more disastrous than the effects of the droughts which developed in 1945 and early in 1946.

(a) *The Situation in Continental Europe*

Total indigenous production of food for the 1946-47 consumption year is estimated as sufficient to supply about 2,100 calories a head daily at the retail stage in continental Europe and French North Africa. For continental Europe as a whole, such a food output may be estimated at around 90 per cent. of pre-war, in terms of calories, compared with about 80 per cent. produced in 1945-46. Preliminary estimates are:—

Countries.	Indigenous Production, 1946-47: Calories per Person per Day.
Denmark, Sweden	} Above 2,800
Hungary, Yugoslavia, Romania	
Czechoslovakia, Bulgaria, Poland	2,400-2,800
France, Spain, Switzerland, Finland	2,000-2,200
French North Africa, Italy, Portugal	} 1,600-1,950
Netherlands, Norway, Germany	
Greece, Austria, Belgium	Below 1,600

In making these estimates, weather conditions to date have been taken into account, and reasonably satisfactory weather conditions have been assumed for the remainder of the season. Such forecasts are, of course, hazardous so early in the year, especially for areas such as the Danube Basin, where

* Sizable quantities of wheat from the new harvest should be available from July onwards, but the current emergency situation in the Far East will continue at least until the bulk of the new rice crop becomes available from November onwards or, in some areas, until wheat is harvested early in 1947.

† The term "continental Europe" as used here and throughout the rest of this statement is to be understood to mean continental Europe excluding the U.S.S.R.

‡ The term "Far East" as used here and throughout the rest of this statement covers India, Ceylon, Siam, Burma, French Indo-China, Malaya, the Netherlands East Indies and Philippine Islands, Japan, Korea, and China (including Formosa and Manchuria).

§ Estimates of supplies available for shipment from exporting areas as used in this statement are obviously not firm estimates. Weather, prices, financial arrangements and in many cases food-management policies relating to consumption rates and amounts of cereals fed to live-stock, will all affect the amounts which are eventually moved.