extreme fluctuations in yields occur. It should also be noted that the food estimates are predicated on enforcement of high extraction rates and in the Danube Basin countries on a utilization of maize for food much higher than before the war, assuming that the decline in live-stock numbers has increased quantities of maize available for human consumption. Population in the countries covered is estimated at about 350,000,000 (including 20,000,000 for North Africa) as of 1 January, 1947.

As a basis for comparison, pre-war consumption is estimated to have averaged about 2,500 calories a head daily in Mediterranean Europe, 2,700 in the Danube Basin and Poland, 2,850 in all the rest of continental Europe, and 2,300 in French North Africa, or about 2,750 calories for continental Europe as a whole (alcoholic beverages excluded).

Should the production estimates given be realized, imports of foodstuffs equivalent to about 16,000,000 metric tons of wheat would be required to bring the average consumption of continental Europe to about 90 per cent. and of French North Africa (where pre-war consumption was relatively low) to about 95 per cent. of the pre-war level. Or assuming that sufficient meats, fats and oils, and sugar were available to bring consumption for these commodities to about 80 per cent. of their pre-war per caput level, some 12,500,000 metric tons, or about 450,000,000 bushels of wheat (assuming at least 85 per cent. extraction), would be required.

These estimates are not statements of "requirements," but they do give some idea of the magnitude of the aggregate deficit which may be expected in continental Europe and French North Africa in 1946–47. Assuming the volume of imports discussed above, average consumption could be raised to a level ranging from 2,250 calories per caput daily in the European-Mediterranean area to 2,550 calories or above in western Europe. With these national averages, non-farm consumption in all of the European countries could attain at least 1,900 calories or more, which would mean non-farm consumption in some countries still under the emergency subsistence level. But even assuming imports sufficient to support these average consumption rates, the urban food situation over wide areas in continental Europe will again be disastrous in the spring of 1947 unless live-stock feeding is held to a minimum and supplies are evened out not only as between different consumer classes, but also over the year—*i.e.*, consumption rates during the first half of 1946–47 are not allowed to rise above rates which can be maintained during the second.

(*b*) *The Situation in the Far East*

With average yields, an increase over 1945 of about 7 per cent., or 8,000,000 metric tons, in production of paddy (unhusked) rice in the Far East may be realized in 1946, but the bulk of this rice will not be harvested until November onwards, and the estimates are still some 10 per cent., or 14,000,000 metric tons, short of the pre-war level. Even under favourable conditions, supplies of new rice available for shipment from the exporting countries (Burma, Siam, and French Indo-China) are estimated at not more than 2,500,000 metric tons of paddy for 1946–47, as compared with the average of over 10,000,000 metric tons moved from these countries and Korea and Formosa in the pre-war period, 1935–39.

Current reports indicate that the wheat and other grain crops now being harvested in India are short. Meanwhile, in China production of coarse grains (cereals other than rice and wheat) is also short, and there is no reason to believe that wheat yields are more than average, while acreage may well be under the pre-war level.