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AGRICULTURAL BRANCH

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No. 5



# MONTHLY REVIEW OF THE WHEAT SITUATION

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AGRICULTURAL BRANCH  
(Issued January 1942)

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THE WORLD WHEAT SITUATION - SUMMARY

With almost half of the crop year gone this would normally be the opportune time to take stock of the general wheat situation and with the aid of what is already a matter of record attempt to portray the shape of things to come. But these are not normal times and what might look like a pattern today can be made to look like a jigsaw puzzle the day after tomorrow, so that the yardsticks of other days are no longer valid as a measure of probable developments and trends. In pre-war years, for instance, it was possible to estimate with hope of getting reasonably near the mark, the probable volume of international trade in wheat and even to apportion shares to individual countries. Such predictions nowadays are usually rendered innocuous by a score of reservations.

In the first year of the war, following a season characterized by the accumulation of reserve stocks of wheat in many European countries, the most reliable agencies in the field forecast that world trade in wheat would drop from 643 million bushels in season 1938-39 to between 525 and 575 million bushels in 1939-40. This represented a shrinkage of 68 million bushels on the higher estimate and 118 million bushels on the lower figure, but actually the shrinkage turned out to be less than 25 million bushels. The second war year presented even greater difficulties, the Nazis having overrun most of the European continent, and predictions then were made on the wide range of 450 to 550 million bushels. Figures compiled by the Food Research Institute assessed the 1940-41 world trade in wheat and wheat flour at 490 million bushels.

The third year of war and the third crop year under war conditions are now almost half over and with the extension of hostilities to the Pacific ocean territories the estimating of international wheat trade in 1941-42 has become a matter of pure guesswork. Prior to the Japanese attack on the United States, a tentative estimate of 400 to 450 million bushels had been made but this included shipments to ex-European markets which are now in Japanese hands, and other markets that are temporarily cut off due to the shipping situation.

From published figures which are those of North and South America only, the international movement of wheat to date this season is 13.8 million bushels greater than it was in the same period last crop year. In this comparison only the figures compiled by Broomhall for Canada, the United States and Argentina are used in both years which leaves out Australia and other exporting countries whose statistics are only made available as a delayed broadcast. Canada's exports account for all of the improvement and the position of the Dominion is dealt with at some length in subsequent paragraphs.

On the supply side of the ledger no really important change has been recorded since the last review. The third estimate of the Canadian crop shows a reduction of 3,000,000 bushels, all in western Canada, while the United States wheat crop has been revised downward by 15.3 million bushels. No official change in estimates has come from Australia or Argentina where the new crop harvest is about completed, but the Argentine Government has revised its 1940-41 crop upwards by more than 28 million bushels, making the new harvest 70 million bushels less than a year ago. Revisions have been made also in the 1940 crops produced in Canada and the United States, so that the production table which appeared in the December review is amended as follows:



Wheat Production

	<u>1941</u>	<u>1940</u>
	(bushels)	
United States .....	945,937,000	812,374,000
Canada .....	299,000,000	540,190,000
Argentina .....	220,440,000	299,456,000
Australia .....	166,096,000	82,640,000
Total .....	<u>1,631,473,000</u>	<u>1,734,660,000</u>

The figures published a month ago showed wheat production by the "Big Four" in 1941-42 to be 71.5 million bushels less than the previous harvest but the new figures extend this reduction to 103.2 million bushels.

News from other wheat-producing countries is somewhat mixed and in a number of cases not easy to confirm, especially where it concerns territory in Nazi-occupied Europe. From South Africa, however, comes an official report that the wheat crop is expected to yield 14.5 million bushels compared with 15.6 millions a year ago, and from India the news stresses the need of rain early this year to ensure a good crop for April harvest. Drought has taken some toll in the Punjab but there is still time for recovery in many sections. Prices have been rising and the Government of India has taken steps to halt the advance while at the same time notice has been given that the import duty on foreign wheat will be removed. This may provide a market for Australian wheat which could replace native wheat exported to the Middle East or other adjacent territories.

European Conditions

Crop advices from Soviet Russia strike a more hopeful note for wheat production there. It appears that large areas east of the invaded territory were sown to winter wheat last fall and that when augmented by spring sowings, the loss of the Ukraine will be at least partly offset. It may be that yields will not be as good in Western Siberia and east of the Volga river as those usually obtained in the Ukraine, but it would seem that the wheat picture for the U.S.S.R. in 1942 may be less dark than was generally expected.

In Europe itself, there is grave fear that a very cold winter has seriously affected winter wheat and among the countries likely to suffer are Italy and Spain. The position in the Balkans is obscure but reports last fall emphasized labour shortage and adverse weather at seeding time. There is little doubt, however, that efforts will be made to recover lost ground when spring seeding begins though yields from spring wheat are not as satisfactory as those of winter wheat. It is believed that much of the reserve stock of wheat will be gone before another harvest comes around so that a poor crop in 1942 would spell hardship for much of Europe.

The position in neutral Turkey has made bread rationing necessary. The crop was short and despite shipments made to Turkey from British-owned stocks, the loaf of Turkish bread which contains 30 per cent barley and 20 per cent rye will be rationed at the rate of 1 1/2 pounds per day to labourers, three-quarters of a pound daily to those engaged in lighter tasks, and about half the latter amount to children.

Spain has made a new contract with Argentina to purchase 6.3 million bushels of wheat. Last season she bought about 15 million bushels of wheat and one-third as much corn, and was supposed to ship to Argentina in part payment, certain quantities of iron products. The Argentine press intimates that these products were not received and has not welcomed the new contract.

# The Wheat Situation in Canada

The volume of export clearances of wheat and wheat flour continues to be the bright spot in the Canadian situation. Overseas clearances of wheat alone are running at the rate of about one million bushels weekly in excess of clearances in the corresponding period a year ago with approximately half of the crop year gone. In addition, the wheat flour movement is about one-third greater than the total at this time last year and imports of Canadian wheat into the United States also show improvement.

Figures compiled to the end of December and covering the first five months of the current crop year show unrevised total exports of wheat and wheat flour, including United States imports, to be 86.3 million bushels compared with 54.7 millions in the corresponding period in season 1940-41. The movement during the first half of January has been well maintained but it should be pointed out that when comparing exports this season with last the movement during the August-December period of 1940 was less than 24 per cent of the total exports for the crop year. It will be recalled that shipments during the four months March to June 1941 were unexpectedly heavy and amounted to 120 million bushels or about 52 per cent of the crop year total of 231.2 million bushels. It can happen again but in these unpredictable days to look as far ahead as the summer of 1942 is to get a long way from shore.

Stocks of Canadian wheat are still very large. The visible supply reached the record figure of 507.5 million bushels just before Christmas and has receded only 9.5 million bushels in the interval but on the basis of the third estimate of production, less the amount already delivered from farms and the seed and feed requirements, deliveries from farms in the last half of the season will be quite small.

Taking into account the carry-over of old crop on farms in western Canada the following table shows the relative position in respect to wheat still available for delivery or carry-over in the Prairie Provinces for the period from mid-January to July 31 this year and last.

	1941-42	1940-41
	(bushels)	
Carry-over on western farms July 31 .....	11,500,000	14,250,000
New crop .....	279,000,000	513,800,000
Total on Prairie Farms .....	290,500,000	528,050,000
Deduct:		
Seed and feed requirements .....	71,967,000	58,735,000
Deliveries from farms to mid-January .....	153,994,899	296,417,000
	225,961,899	355,152,000
Balance on farms for delivery or carry-over mid-January to July 31 .....	64,538,101	172,897,898

The figures above indicate a reduction of approximately 108 million bushels in the surplus farm stocks this year compared with last and also that the marketings over the last twenty-eight weeks of the season should not exceed an average of 2.3 million bushels weekly compared with an average of 6.4 million bushels in the first twenty-four weeks.



Some private estimates of the probable carry-over on July 31, 1942 have recently been made and indicate a reduction of 100 million bushels or more from last year's record figure of 480 million bushels. Such a reduction in carry-over pre-supposes that the present rate of exports in excess of last season's figures will be maintained throughout the balance of the 1941-42 crop year. This would appear to be a very optimistic view since we have already pointed out that more than half of the 1940-41 exports were made in the four months March to June 1941 and the season's exports of wheat and wheat flour reached the very respectable total of 231 million bushels.

A more realistic view but one that is not without considerable hazard is to assume that exports this season might equal those of 1940-41 in which case the carry-over based on current estimates of production and home requirements might show a reduction of 70 million bushels. The 1941 wheat crop plus carry-over totals approximately 780 million bushels of which 140 millions are earmarked for home use. It would, therefore, require exports in the neighbourhood of 230 million bushels to bring the carry-over down to 410 million bushels on July 31, 1942.

#### PRICES

Chicago continued to furnish most of the action in price movement during the past month but Winnipeg moved into higher ground by easy stages partly in sympathy with Chicago and partly reflecting the improved export business in Canadian wheat and a firming up of the statistical position. A net gain of 5 cents per bushel (U.S. funds) was recorded during the four-week period at Chicago, using closing prices as the basis, but at the peak on January 12, the May future was up about 7 cents. The Winnipeg gain in May wheat was roughly 2 cents in the same period.

Most of the excitement at Chicago was due to pending legislation on price control in the United States. Nothing definite has yet resulted but the market was sensitive to the discussions at Washington. Sales of wheat held by the Commodity Credit Corporation had the effect of dampening bullish enthusiasm and there was some recession from the high points.

In Canada, no ceiling price has yet been named for wheat grown in western Canada but there has been agitation from farmer and grain dealer organizations for a ceiling price much higher than the top price of 82 3/4 cents per bushel reached during the base period chosen for the price control legislation in Canada.

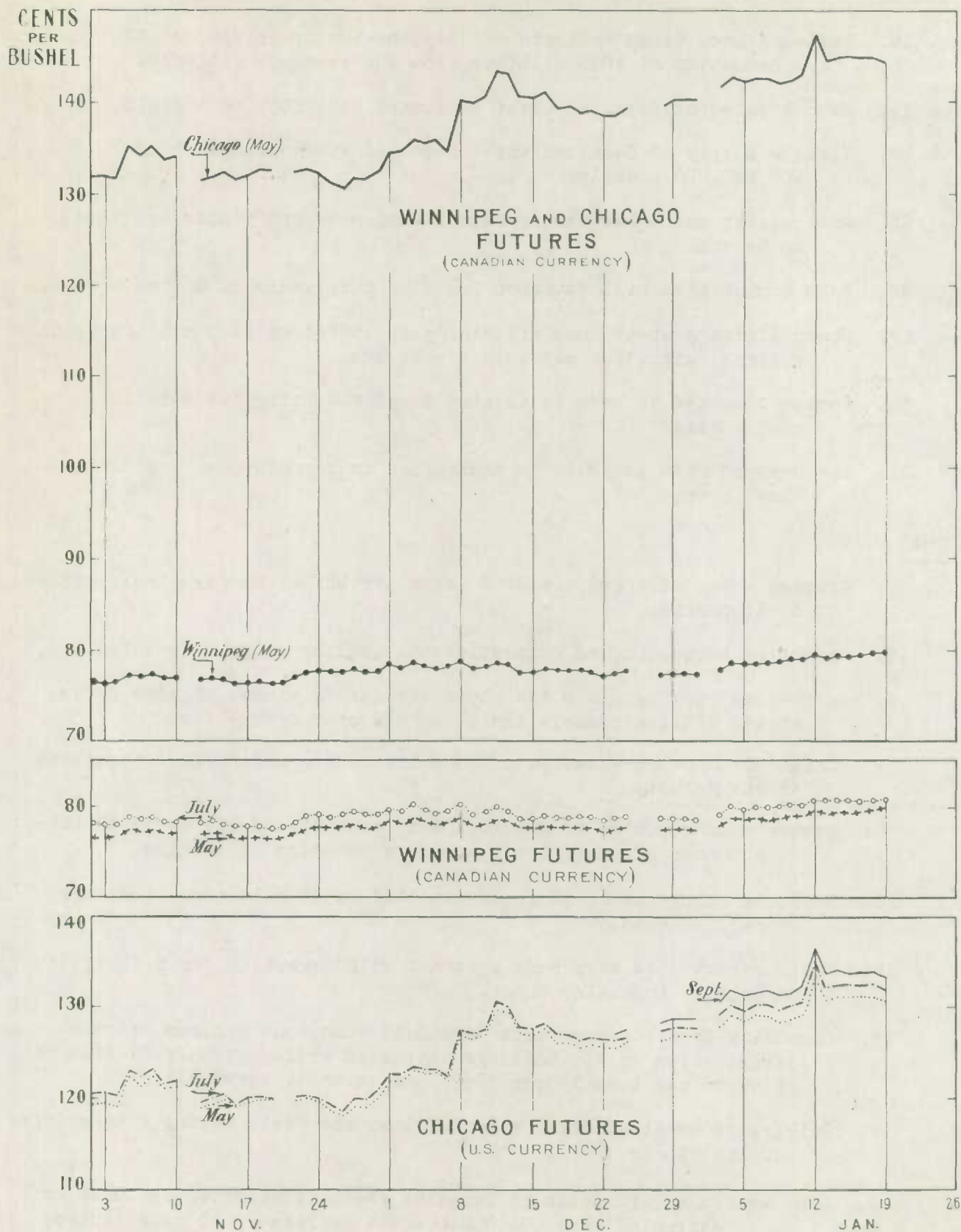
#### WHEAT LOST IN SINKINGS

An estimate of wheat lost through the sinking of vessels during the 1940-41 crop season is credited to the Food Research Institute in a recent issue of the "Southwestern Miller", and places the losses in shipments mainly to the United Kingdom at 7 to 9 per cent or between 20 and 25 million bushels of wheat. Total losses from destruction and deterioration attributable to war are estimated at 40 to 60 million bushels. This would include the bombing of warehouses and mills.

The survey states that while British port warehouses and mills suffered serious damage from bombing it is doubtful whether the wheat lost from this cause was great, partly because of the discouragement of heavy storage at points most likely to be attacked and also because of the salvaging possibilities.

While the total losses from sinkings and bombings are large, the authors of the Survey regard them as less distressing than the economic losses arising from the blockade and restricted international movement which is costing millions of dollars for the maintenance of prices in wheat surplus countries.

# DAILY CLOSING WHEAT FUTURES QUOTATIONS IN LEADING MARKETS



CALENDAR OF WHEAT EVENTS

1941

- Dec. 18. United States final estimate of 1941 wheat crop is 945,937,000 bushels, a reduction of 15.3 millions from the previous estimate.
19. Export sales of Canadian wheat estimated at 1,500,000 bushels.
22. Visible supply of Canadian wheat reported at record level of 507,540,000 bushels.
23. Australia's wheat harvesting almost completed and yields continue to be good.
27. Farm Commodities bill extended for five more years in United States.
29. South Africa's wheat crop officially estimated at 14.5 million bushels compared with 15.6 millions a year ago.
30. Turkey reported to have instituted bread rationing but details are lacking.
31. The need of rain in India is emphasized in reports covering the new wheat crop.

1942

- Jan. 2. Chicago wheat advanced almost 2 cents per bushel on farm legislation developments.
5. Argentine harvest nears completion and quality of new wheat is good.
6. Australian reports place the wheat surplus in excess of home needs at 140 million bushels including old crop carry-over.
7. Cargo of Canadian wheat reported sold to Eire and further inquiries in the market.
9. Severe cold reported from Europe with probable damage to winter wheat in a number of countries where snow covering is lacking.
10. Sweden's supply of bread grain reported to be only three-quarters of requirements.
13. Spain reported to have made contract with Argentina for 6.3 million bushels of Argentine Wheat.
15. Commodity Credit Corporation in U.S.A. announces minimum price on market sales of its holdings in period ending January 31 will be 16 cents per bushel over 1941 loan value at terminals.
17. Bulgaria's wheat supplies reported low, the Nazis having appropriated surplus stocks.
19. Last week's export sales of Canadian wheat at Winnipeg featured by sales estimated at 9,000,000 bushels on January 15 constituted one of best weeks in a long time. Part of the business represented flour sales and the chief buyer was the United Kingdom.



## THE UNITED STATES

A downward revision of 15.3 million bushels in the 1941 wheat crop in the United States was made in the final estimate published just before Christmas. The total harvest is now indicated to be 945,937,000 bushels of which 671.3 millions comprised winter wheat and 274.6 million bushels spring wheat including 41.8 millions of Amber Durum variety. The 1940 crop of all wheat was also reduced to 812.4 million bushels compared with 816.7 million bushels previously estimated. About the same time the first official estimate of acreage sown to winter wheat for harvest in 1942 was issued by the Department of Agriculture and indicated an area of only 39,318,000 acres compared with 45,663,000 acres sown in 1940 for harvest in 1941. This is a reduction of 6,345,000 acres and represents the smallest winter wheat sowings in seventeen years. The condition of the wheat crop now in the ground was estimated in the report at 87 per cent of normal and based on normal weather conditions during the growing season the yield indicated would be about 631 million bushels or 40.4 millions less than was harvested in 1941.

In an effort to dispose of wheat held by the Commodity Credit Corporation it was announced that wheat from the 1939 and 1940 pool, amounting to about 170,000,000 bushels, would be offered for sale at the market price but at not less than 15 cents per bushel over the 1941 loan value at the point of storage. This price was effective through December 1941 and the plan calls for the establishing of basic prices on the 14th and last days of each month to remain in effect from the 15th to the close of the month, and from the first day of each month to the 14th inclusive, unless cancelled by public notice. The average loan price in 1941 was 98 cents at the farm, which for No. 2 Red Winter wheat in store Chicago works out at \$1.15 per bushel.

At the end of December it was announced by the Department of Agriculture that farmers in the United States had received in the month ending December 15, 1941, an average price of 102.2 United States cents per bushel for wheat, compared with 93.4 cents in the month previous and 71.5 cents per bushel in the month ending December 15, 1940. It was further stated that as the result of price movements in the month ending December 15, 1941, the general average of all prices received by farmers stood at 99 per cent of parity compared with 79 per cent a year previous. Wheat prices had advanced about nine cents per bushel but the general average referred to was attained largely by the improvement in meat animal prices and in the price of rice.

### Farm Stocks of Wheat

Stocks of wheat on United States farms on January 1, 1942, were the highest on record for the beginning of a calendar year. The total was 373.8 million bushels and represented 39.5 per cent of the crop produced in 1941. The ten-year average (1931-40) stocks on farms on January 1 is 220.7 million bushels, and the largest previous figure was 322 million bushels on January 1, 1932. A year ago the January 1 stocks totalled 280.8 million bushels or 93 millions less than the 1942 figure.

A substantial part of the wheat stocks on farms represents wheat on which loans have been taken out through the Commodity Credit Corporation. The total amount of 1941 wheat under loan on January 3, 1942 was 348.4 million bushels and 113.4 millions or about one-third of this wheat was stored on farms. Farm storage under the loans is heaviest in North Dakota and Montana, both spring wheat states, while Kansas in the heart of the winter wheat area is in third place.

# ARGENTINE LETTER

The correspondent of the Dominion Bureau of Statistics in Buenos Aires has forwarded the following report, under date of January 5, 1942, dealing with the grain situation in Argentina.

## First Official Estimate of Grain Crops

The first calculations made by the officials of the Ministry of Agriculture of the five principal field crops, excluding maize, for the new season, 1941-42, on the basis of the fourth official estimate of the areas seeded, and of the threshing results so far as these are available, are set out below:

	First Estimates of Production 1942	Comparison with Revised Figures for Last Season	
	bushels	bushels	per cent
Wheat .....	220,459,000	- 78,998,000	- 26.4
Linseed ...	66,926,000	+ 9,448,000	+ 16.5
Oats .....	33,718,000	- 1,264,000	- 3.6
Barley ....	19,750,000	- 16,489,000	- 45.5
Rye .....	7,480,000	- 874,000	- 10.5

Comparison with recent crops:

	Wheat	Linseed	Oats	Barley	Rye
	(bushels)				
1941-42 .....	220,459,000	66,926,000	33,718,000	19,750,000	7,480,000
1940-41 .....	299,456,000	57,462,000	34,982,000	36,238,000	8,354,000
1939-40 .....	130,732,000	42,533,000	56,581,000	39,091,000	13,582,000
5-year average ..	253,367,000	59,175,000	48,384,000	26,922,000	10,041,000
10-year average .	239,566,000	64,871,000	52,227,000	27,643,000	10,146,000

In the memorandum accompanying the figures it is pointed out that frosts during the spring season caused serious damage in the wheat fields in the northern parts of the provinces of Santa Fe and Cordoba and in the west of Buenos Aires province, and the damage has been increased lately as the result of hail storms.

Comment:- Among experienced grain men the wheat estimate is regarded as probably 5 per cent too high, although with the southern district still to be heard from a definite opinion is difficult to form as yet. The next calculation should appear about the third week of this month, and the estimates will be assembled on a sounder basis.

## Crop Conditions

The regular monthly report on crop conditions in the cereal zones, published by the Ministry of Agriculture, gives the following picture:

During December the weather conditions were favourable for crops in a state of vegetation throughout the littoral zone, but in the central zone the rains were insufficient and more are needed in order to normalize the plants. Harvesting of the fine grain crops was able to proceed normally, the rains being neither frequent nor heavy enough to hinder the work. Hence the greater part of the wheat and linseed crops may be considered safe.

The Wheat Crop.- In general the yields obtained are from Fair to Good, and the quality is from Superior to Normal.



In Santa Fe at the time of harvesting the wheat crop as a whole was in Fair condition, being Good in the southern districts and Poor in the north. The area abandoned as a result of the September and October frosts amounted to 30 per cent of the total area in the province seeded to wheat.

In Cordoba also the general condition of the wheat may be considered as Fair, and here also about 30 per cent of the seeded area remains uncut because of the frost damage. In both Santa Fe and Cordoba the quality of the grain is Good, the weight frequently exceeding 64 pounds per bushel. In both provinces and also in Entre Rios cutting has been finished, and threshing has become general, but is proceeding slowly in order to keep the grain stacked.

The crop in Entre Rios and in northern Buenos Aires is turning out more abundant than was foreseen a month ago. On the other hand, the damage from frost and drought in western Buenos Aires is less severe than was thought by the producers at first. But some of the damaged area having been ploughed under and other fields having been devoted to pasture, there is a loss of about one-fifth of the area seeded to wheat.

In the south-east of Buenos Aires the condition of the wheat fields is Excellent, although December hailstorms caused total losses on some farms.

In the northern part of the Pampa yields were from Fair to Good, except in one section, where they were Poor. In the centre and south yields were from Fair to Poor. The principal causes of damage in the Pampa were drought and persistent winds.

#### Supplies and Markets

A close check-up of the commercial stocks of grains and seeds in the country as at December was made by the National Grain & Elevator Board, uncovering in some cases greater quantities than apparently had been suspected.

In publishing the first official estimate of the crops of the new season, the Ministry of Agriculture in its comparison of the new with recent old crops, changed some of the old crop yields, thus reconciling current stocks with production in former seasons.

The statistics used in this section of this report have been adjusted accordingly.

Wheat exports during December were 5,987,000 bushels, comprising 5,366,000 bushels of wheat and 622,000 bushels of flour in terms of grain. These figures compare with a combined total in November of 5,651,000 bushels.

Incorporating the adjustments mentioned above, the statistical position is now as shown below:

Carry-over from 1939 (revised) .....	11,280,000 bushels	
Revised official estimate 1940-41 crop .....	299,456,000	"
Supplies as at January 1, 1941 .....	310,736,000	"
Deduction for seed and domestic needs, 1941 .....	101,044,000	"
Exportable surplus 1941 .....	209,692,000	"
Shipments in 1941: Wheat .....	85,216,000 bu.	
Wheat as flour .	2,066,000 "	87,282,000 "
Carry-over into 1942 .....	122,410,000	"
First official estimate 1941-42 crop .....	220,459,000	"
Total supplies as at January 1, 1942 .....	342,869,000	"
Deduction for seed and domestic requirements .....	110,229,000	"
Surplus available for export .....	232,640,000	"

The quality of the early deliveries of the new wheat crop is regarded as highly satisfactory and much superior to that of the old grain. It is expected to store well, and the intention of the officials is to leave it as far as



possible in the possession of the farmers or in the flat warehouses in the country railway stations, rather than permit the limited port facilities to become clogged with wheat for which there is no outlet.

The Government has already decreed that no wheat of the new crop is to be used for milling purposes for a period of one year. The millers are required to obtain all their supplies from the Grain Board. It must be solely old wheat, and the price to be paid to the Board is 90. pesos per ton. The Board's price to the farmer is 67.50 per ton. It is estimated that about 80,835,000 bushels of the old crop wheat will be used up in this way.

The Grain Board is of course the only buyer of the new wheat crop. Purchasing commenced on December 9, but to date only about 100,000 tons (3,674,000 bushels) have been acquired, due in part to the late harvest and slow threshing operations for lack of bags.

Under existing conditions there is no advantage to the grower in holding back his wheat and unless some control over deliveries is established it is anticipated that there will be a tendency to ship all wheat to the Board at the earliest possible moment, and secure the cash. But as it is understood that the National Bank has advised the Government that it cannot allow its present heavy overdraft to be increased, it is a matter of speculation as to how the situation will be handled.

There was little business passing during December. Great Britain made some small purchases, aggregating perhaps some 60,000 tons (2,205,000 bushels), delivery to be deferred until April. Brazil also bought moderate quantities.

Spain is understood to be negotiating for the purchase of 200,000 tons (7,349,000 bushels) but the newspapers here have unkindly called attention to the barter of 350,000 tons (12,860,000 bushels) of Argentine wheat last year for Spanish products, the grain being duly shipped, but nothing having yet been received in return. Much needed iron products were included in the bargain.

During the month the Grain Board raised slightly its prices for export wheat (old crop): 6.90 ex Buenos Aires; 6.87 1/2 ex Bahia Blanca; and 6.77 1/2 ex Rosario, are now the current rates. No price has yet been set for new crop grain, nor is any such action looked for at the present time.

#### AUSTRALIAN CABLE

The following cable was received on January 16 from the Canadian Government Trade Commissioner in Melbourne:

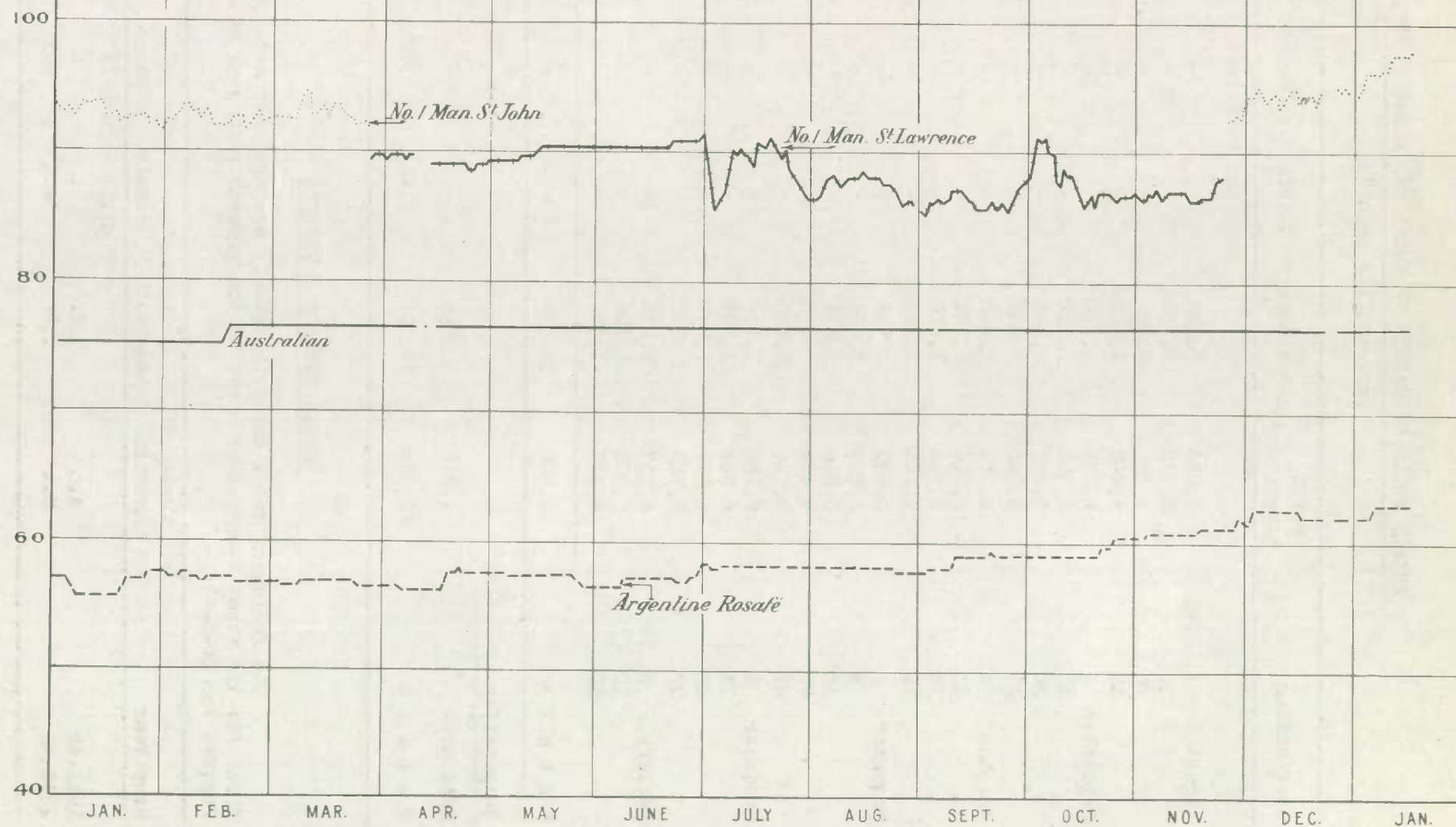
"Estimated production of wheat in Australia in season 1941-42 is approximately 160,542,000 bushels of which the Australian Wheat Board anticipates acquiring 145,000,000 bushels. Approximately 18,500,000 bushels of old crop season's wheat remain unsold. No change in official wheat prices is noted and sales during December amounted to about 4,500,000 bushels.

"The flour export situation is principally affected by the shortage of tonnage and while a good demand from the East Indies exists, the lack of shipping facilities is reflected in the quotations for flour which remain substantially unaltered. The Minister of Commerce has announced that the area to be sown to wheat in Australia for the 1942-43 crop is to be no greater than the area sown for the crop just harvested although a shortage of superphosphate may necessitate a reduction."

CENTS  
PER  
BUSHEL

## SHIPPERS' OFFERS TO THE UNITED KINGDOM

F.O.B. PORT OF SHIPMENT, AS REPORTED DAILY BY BROOMHALL'S LIVERPOOL OFFICE  
Jan. 1941 to date  
(Canadian cents per bushel)



WEEKLY WORLD SHIPMENTS OF WHEAT AND WHEAT FLOUR  
(Broomhall's Records)

Week ending		North America	Argentina	Russia	Danube	Other	Totals
(thousand bushels)							
August	9, 1941	4,224	2,172	-	-	-	6,396
	16	3,912	2,560	-	-	-	6,472
	23	4,760	1,260	-	-	-	6,020
	30	4,208	1,216	-	-	-	5,424
September	6	4,376	1,400	-	-	-	5,776
	13	3,496	1,152	-	-	-	4,648
	20	3,640	1,544	-	-	-	5,184
	27	3,960	936	-	-	-	4,896
October	4	4,272	1,960	-	-	-	6,232
	11	3,216	1,120	-	-	-	4,336
	18	3,960	1,512	-	-	-	5,472
	25	4,256	1,256	-	-	-	5,512
November	1	3,832	784	-	-	-	4,616
	8	2,824	1,496	-	-	-	4,320
	15	3,864	1,376	-	-	-	5,240
	22	4,456	976	-	-	-	5,432
	29	3,736	1,576	-	-	-	5,312
December	6	5,136	1,432	-	-	-	6,568
	13	4,344	1,104	-	-	-	5,448
	20	4,968	1,047	-	-	-	6,015
	27	3,723	566	-	-	-	4,289
January	3, 1942	4,157	1,275	-	-	-	5,432
	10	2,805	1,526	-	-	-	4,331
	17	4,275	1,650	-	-	-	5,925
T o t a l s		96,400	32,896	-	-	-	129,296
<u>Comparative 1940-41</u>							
24th week		3,328	264	-	-	-	3,592
T o t a l s		73,336	37,304	3,432	1,456	-	115,528

WEEKLY AVERAGE SHIPMENTS

The following table shows the weekly average shipments of wheat and wheat flour for the first twenty-four weeks of the present crop year with comparative figures for 1940-41:

Crop Year	North America	Argentina	Russia	Danube	Other	Totals
( million bushels )						
1941-42	4.0	1.4	-	-	-	5.4
1940-41	3.1	1.5	0.1	0.1	-	4.8



BUSHELS  
'000,000'

# CUMULATIVE RECORD OF WORLD SHIPMENTS OF WHEAT AND FLOUR BY COUNTRIES OF ORIGIN (BROOMHALL'S REVISED FIGURES)

1941-42

## LEGEND

N. AMERICA.....  
ARGENTINA.....  
OTHER COUNTRIES.....

300

200

100

0

1

10

20

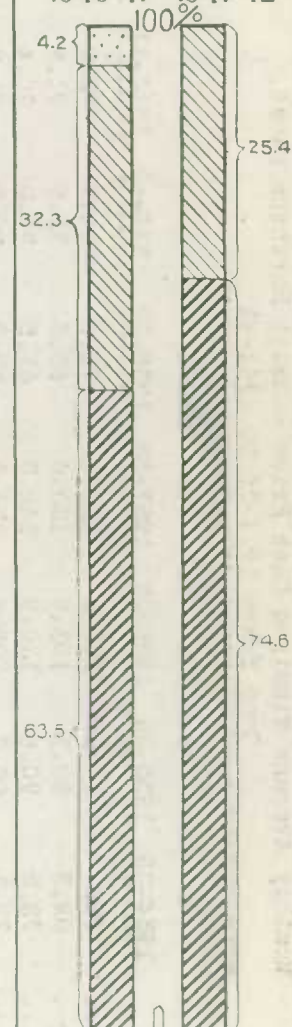
30

40

50

WEEKS

## PERCENTAGE OF TOTAL SHIPMENTS CROP YEARS 1940-41 1941-42



Monthly Average Winnipeg Cash Price - No. 1 Northern Wheat,  
Crop Years 1934-35 to 1941-42

(cents per bushel)

	1934-35	1935-36	1936-37	1937-38	1938-39	1939-40	1940-41	1941-42
August .....	86.0	84.5	102.2	131.8	76.6	54.9	72.2	73.3
September ..	82.3	90.3	103.9	133.6	63.3	73.9	71.7	72.6
October ....	78.2	90.8	110.9	142.3	61.5	70.3	70.4	73.7
November ..	79.6	85.7	108.4	134.6	59.0	70.5	71.8	73.2
December ..	79.2	84.7	120.2	137.4	60.6	82.4	73.4	74.4
January ....	79.0	84.8	124.7	149.1	59.9	82.8	74.2	
February ..	79.5	82.1	127.0	144.6	60.4	83.8	75.2	
March .....	81.9	82.1	135.7	138.4	59.5	87.0	76.2	
April .....	87.6	80.5	138.9	138.4	60.5	89.2	75.7	
May .....	85.7	76.8	130.6	115.2	65.5	79.7	75.9	
June .....	81.7	79.5	124.2	114.3	61.8	72.3	77.0	
July .....	81.4	93.4	145.6	98.4	55.3	71.4	74.7	

Wheat Prices and the General Price Level 1/

The following table shows the general index numbers of wholesale prices in Canada and Great Britain and of No. 1 Northern Wheat (Winnipeg Cash Price, basis in store Fort William and Port Arthur)

	General Index Canada	Board of Trade United Kingdom	Wheat No. 1 Manitoba Northern Fort William and Port Arthur basis
	1930=100	1930=100	1930=100
1930 .....	100.0	100.0	100.0
1931 .....	83.3	87.8	62.4
1932 .....	77.0	85.6	59.0
1933 .....	77.5	85.7	64.8
1934 .....	82.7	88.1	79.4
1935 .....	83.3	89.0	89.6
1936 .....	86.1	94.4	99.5
1937 .....	97.7	108.8	142.3
1938 .....	90.8	101.4	107.7
1939 .....	87.1	102.8	68.5
1940 .....	95.7	136.6	82.0
December, 1940 ..	97.2	148.2	77.9
January, 1941 ..	97.7	149.5	78.8
February .....	98.4	150.0	79.8
March .....	99.2	150.8	80.9
April .....	100.0	150.9	80.4
May .....	102.2	151.3	80.6
June .....	103.9	152.4	81.7
July .....	105.2	153.2	79.3
August .....	106.0	153.2	77.8
September .....	107.6	154.3	77.1
October .....	108.4	154.6	78.2
November .....	108.5	155.2	77.7
December .....	108.1	2/	79.0

1/ Prepared by the Internal Trade Branch. 2/ Not yet available.



THE CANADIAN SITUATION

I. CROP REPORT OF JANUARY 21, 1942

On January 21, the Dominion Bureau of Statistics issued the third estimate of the area, production and value of field crops in Canada in 1941. In accordance with previous practice, the estimates of wheat, rye and flaxseed may be subjected to further revision when full marketing statistics for the western provinces are available after the end of the crop year. The average prices used in crop valuation are based on monthly and special compilations up to the end of December, 1941, so these may also require revision due to price changes during the last seven months of the crop season. When the results of the 1941 census become available, further revision in the estimates may be necessary.

SUMMARY

Canada's 1941 wheat crop is placed at 299,401,000 bushels in the third estimate of the crop. The 1941 figure is sharply reduced from the very large crop harvested in 1940. Reduced acreage and unfavourable weather conditions in Saskatchewan and Alberta were largely responsible for the curtailed production. The production of fall wheat, mainly in Ontario, is estimated at 16,465,000 bushels, and that of spring wheat is placed at 282,936,000 bushels. For the Prairie Provinces alone, spring wheat production is estimated at 279 million bushels, a decrease of 234.8 million bushels from the 1940 output. The Manitoba estimate for 1941 has been placed at 54.5 million bushels, which compares with the 1940 crop of 66.4 million bushels. Improved yields per acre in Manitoba offset to some extent the reduced acreage devoted to wheat. In Saskatchewan both the acreage and the yield per acre were lower in 1941 and the total crop of 136 million bushels was just over half of the 266.7 million bushels produced in 1940. Similarly in Alberta both acreage and yields were lower and the crop of 88.5 million bushels was less than half the final figure for 1940.

The gross value of all field crops produced in Canada has been estimated at \$647,850,000, a decrease of \$28,832,000 from the 1940 total. The only major decline in values was in the case of wheat where the very much smaller crop returned the same average price per bushel as in 1940, with a resultant decline of \$125,686,000 in the gross farm value of the crop. Other minor declines in value were estimated for buckwheat, grain hay and sugar beets but all other crops showed increased values. On a provincial basis the 1941 gross farm value was higher in all provinces except Saskatchewan, Alberta and British Columbia. The decline in the latter province was very slight.

AGRICULTURAL SEASON OF 1941

The crop season of 1941 in Canada was far from satisfactory as a result of drought in two large agricultural areas. In the Prairie Provinces crops were hard hit by high temperatures and scanty rainfall in Saskatchewan and to a lesser extent in Alberta. Manitoba enjoyed very favourable weather conditions. In Ontario and Quebec a considerable reduction in the production of feedstuffs occurred as a result of a prolonged dry spell. July rains in Quebec improved crops and yields of grains were fair to good. Weather conditions in the Maritimes were fairly satisfactory. British Columbia experienced a successful season.

Spring field work in Manitoba was hindered by wet weather and seeding operations were later than usual. Exceptionally favourable rainfall during April and May was conducive to good development of all crops. Frequent general rains during June and high temperatures during the last half of the month brought the crop along



rapidly. During July precipitation was light but moisture supplies were generally adequate for full plant development. Intermittent heavy rains during August and September hampered both harvesting and threshing and caused some lowering of the quality of the grain.

In Saskatchewan seeding of the new crops was somewhat delayed by wet lands in the eastern districts. Precipitation during April and May was slightly above normal but germination of the crop was uneven in the drier western areas. Following two weeks of cool, showery weather in June, the first of two hot, dry spells was experienced. Heavy rains at the end of June relieved the situation but stubble crops in a large area surrounding Swift Current were virtually beyond recovery and marked deterioration had occurred elsewhere. The second drought period, characterized by high temperatures and hot, drying winds, began during the third week and lasted about ten days. The area of crop failure in the south-west and centre was widened and further sharp declines in condition occurred. Cool, showery weather delayed threshing operations in September but generally the crop was brought in under fairly good conditions.

Moisture reserves at seeding time in Alberta were fair to good in southern districts and only poor to fair in the north. Precipitation in April and May was lighter than usual but cool weather generally prevented any serious damage to the new crops. Timely rains during June and the advent of warmer weather aided crop development. Moisture supplies were generally adequate during the first two weeks of July although shortages were evident in parts of the east-central districts and intense heat in the third week with practically no rainfall caused serious reductions in crop prospects. Rainfall was negligible until the first week in August when moderate rains in central and northern Alberta benefited coarse grains and late crops. While harvesting and threshing conditions were generally good in southern districts, intermittent heavy rains in central and northern sections caused considerable delay and lowered the quality of the unthreshed grain.

#### WHEAT PRODUCTION IN THE PRAIRIE PROVINCES, 1941

The three estimates of the 1941 wheat crop in the Prairie Provinces, together with the final estimate of the 1940 crop are tabulated below:

Province	1 9 4 1			1 9 4 0
	September	November	January	Final
	bu.	bu.	bu.	bu.
Manitoba .....	56,000,000	56,000,000	54,500,000	66,400,000
Saskatchewan .....	136,000,000	136,000,000	136,000,000	266,700,000
Alberta .....	94,000,000	90,000,000	88,500,000	180,700,000
Prairie Provinces ....	286,000,000	282,000,000	279,000,000	513,800,000

The third estimate of the 1941 Prairie wheat crop shows a reduction of 3,000,000 bushels from the estimate published in November 1941. This reduction is shared equally between Manitoba and Alberta, the figure for Saskatchewan having been left unchanged. Compared with the final estimate for the 1940 wheat crop, the harvest in western Canada in 1941 was 234,800,000 bushels smaller.

The amount of wheat still held on farms which might be delivered during the balance of the season or carried over on July 31, 1942, is indicated in the following compilation in which allowance has been made for seed and feed requirements. It is estimated at this time that these latter requirements will be 13.3 million bushels greater than the revised figures for the crop year 1940-41 and that the amount to be fed to live stock and poultry in the Prairie Provinces will total 44 million bushels. Seed requirements are placed at approximately 28 million bushels, making a total of 72 millions representing the use of wheat on prairie farms.

	<u>Bushels</u>
Carry-over on farms July 31, 1941 .....	11,500,000
Third Estimate of 1941 crop .....	279,000,000
Total Farm Supplies .....	290,500,000
<u>Deduct:</u>	
Seed and feed requirements .....	71,967,000
Deliveries from farms Aug. 1, 1941 - Jan. 15, 1942 .	153,994,899
	<u>225,961,899</u>
Balance for delivery or carry-over on farms on Jan. 16, 1942 ..	<u>64,538,101</u>

#### Durum Wheat Production, 1937-1941

In the above estimates of wheat production in western Canada, Durum wheat is included. No change is made in the production figures so that the third estimate for Amber Durum wheat remains at 4,200,000 bushels of which 2.7 millions was grown in Manitoba and 1.5 million bushels in Saskatchewan. The production of Durum wheat in western Canada has steadily declined in recent years and the 1941 crop was only one-sixth of the crop produced five years previous. With the introduction of rust-resistant wheats in the Prairie Provinces there has been a considerable switch to common wheat in Manitoba and such varieties as Thatcher appear to have taken the place of Durum wheat types.

No further revision has been made in the estimate of the 1940 crop of Durum wheat and the final figure remains at 6,000,000 bushels for Manitoba and 2,500,000 bushels for Saskatchewan.

Comparative production figures for the years 1937 to 1941 are given below.

	<u>Manitoba</u>	<u>Saskatchewan</u>	<u>Total</u>
	bu.	bu.	bu.
1937 .....	23,000,000	2,000,000	25,000,000
1938 .....	15,000,000	2,500,000	17,500,000
1939 .....	8,500,000	2,300,000	10,800,000
1940 .....	6,000,000	2,500,000	8,500,000
1941 .....	2,700,000	1,500,000	4,200,000



1940 CROP ESTIMATES

Final revisions of the 1940 wheat crop estimates have been made for the Prairie Provinces on the basis of disposition data that are now complete. The figures by provinces are as follows: Manitoba 66,400,000, Saskatchewan 266,700,000 and Alberta 180,700,000, making a total of 513,800,000 bushels for the Prairie Provinces compared with 525,000,000 bushels indicated in the third estimate made on January 21, 1941. The 1940 crop was, therefore, over-estimated to the extent of 11.2 million bushels or only slightly more than two per cent. The final figures and their supporting disposition data are given in the following table:

Description	Manitoba	Saskatchewan	Alberta	Prairie Provinces
	000 bu.	000 bu.	000 bu.	000 bu.
<b>Supplies:-</b>				
Carry-over on farms, July 31, 1940 ...	1,000	6,250	7,000	14,250
Final estimate, 1940 crop .....	66,400	266,700	180,700	513,800
Total Supplies .....	67,400	272,950	187,700	528,050
<b>Disposition:-</b>				
Primary receipts at Country Elevators.	54,850	240,577	152,750	448,177
Primary receipts at Interior, Private and Mill Elevators .....	1,495	1,173	1,671	4,339
Platform Loadings .....	1,236	694	1,729	3,659
Total Farmers' Marketings .....	57,581	242,444	156,150	456,175
Seed .....	3,971	14,150	8,507	26,628
Feed .....	4,325	11,199	16,576	32,100
Country Millings .....	523	657	467	1,647
Carry-over on farms July 31, 1941 ....	1,000	4,500	6,000	11,500
Total Disposition .....	67,400	272,950	187,700	528,050

In the case of coarse grain crops produced in the Prairie Provinces in 1940, no revision has been made of the figures contained in the January 1941 report, so that the third estimate of these crops is now regarded as the final estimate.



### Yield Charts in the Prairie Provinces by Crop Districts

Accompanying this report are two charts showing the average yields per acre of wheat by crop districts for the Prairie Provinces in 1940 and 1941.

#### Distribution of Crop Districts According to Yield Per Acre of Wheat, 1940 and 1941

Yield Per Acre Bushels	Number of Districts							
	Manitoba		Saskatchewan		Alberta		Prairie Provinces	
	1940	1941	1940	1941	1940	1941	1940	1941
0 - 4.0	0	0	0	0	0	0	0	0
4.1 - 8.0	0	0	0	6	0	2	0	8
8.1 - 12.0	0	0	1	4	0	1	1	5
12.1 - 16.0	2	1	10	5	1	5	13	11
16.1 - 20.0	6	5	5	3	2	5	13	13
20.1 - 24.0	4	8	2	2	11	4	17	14
24.1 - 28.0	2	0	1	0	3	0	6	0
28.1 - 32.0	0	0	1	0	0	0	1	0
T o t a l s	14	14	20	20	17	17	51	51

The distribution of yields per acre by crop districts reveals the reduction in the 1941 crop, in that 8 crop districts reported yields below 8 bushels per acre and no crop district had a yield per acre over 24 bushels. In 1940 only 1 crop district reported an average yield below 12 bushels and 7 districts harvested yields above 24 bushels per acre. Of the 13 crop districts having a yield per acre below 12 bushels in 1941, 10 were in Saskatchewan and located in the central and western portion of that province.

#### Manitoba

Although Manitoba had a higher average yield per acre in 1941 than in 1940, there was a reduction in 8 of the 14 crop districts of the province. The important crop districts from the standpoint of wheat acreage, however, reported higher yields in 1941. There was much greater uniformity of yields per acre in 1941 than in 1940. By crop districts the range in 1941 was from a low of 16.0 bushels in crop district 13 to a high of 21.9 in districts 5 and 7. In 1940 the range was from a low of 15.0 to a high of 27.7 bushels per acre.

#### Saskatchewan

There was a sharp reduction in the average yield per acre in Saskatchewan and this reduction was common to 14 of the 20 crop districts in this province. The districts showing improvement in 1941 were 1A, 1B, 2A, 2B, 4A and 5A. All these districts, with the exception of 4A, are located in the south-eastern section of the province bordering on Manitoba. The most drastic reduction in 1941 occurred in the south-central and west-central crop districts, particularly 3BS, 3BN, 4B, 6B and 7A.

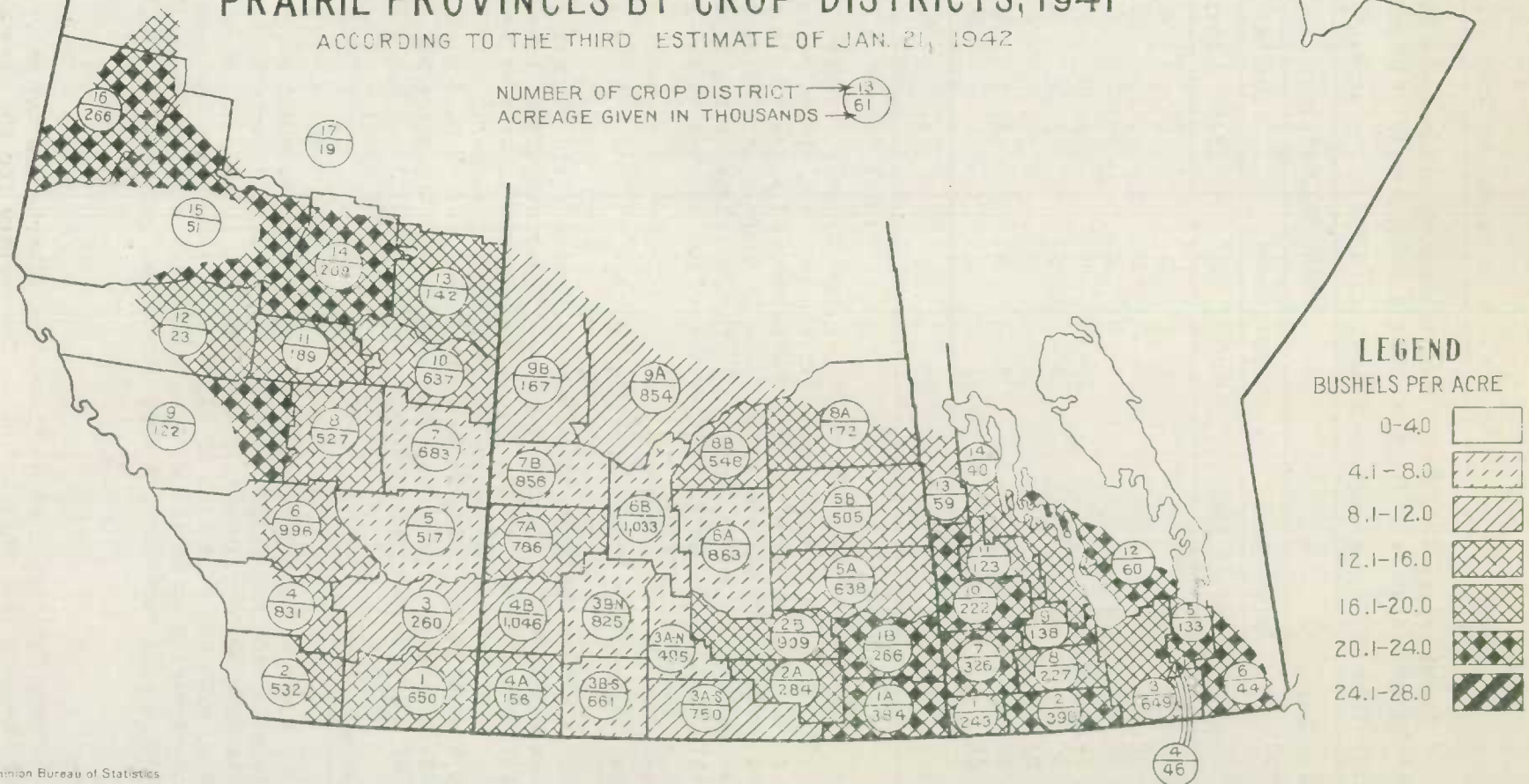
#### Alberta

Crop District 1 in south-eastern Alberta was the only district reporting a higher yield in 1941 than in 1940. The average for the province was sharply reduced with the central districts showing the most marked curtailment. Districts 5 and 7, bordering on central Saskatchewan, reported yields of only 6.5 and 5.2 bushels per acre, respectively, in 1941.

# AVERAGE YIELDS PER ACRE OF WHEAT IN THE PRAIRIE PROVINCES BY CROP DISTRICTS, 1941

ACCORDING TO THE THIRD ESTIMATE OF JAN. 21, 1942

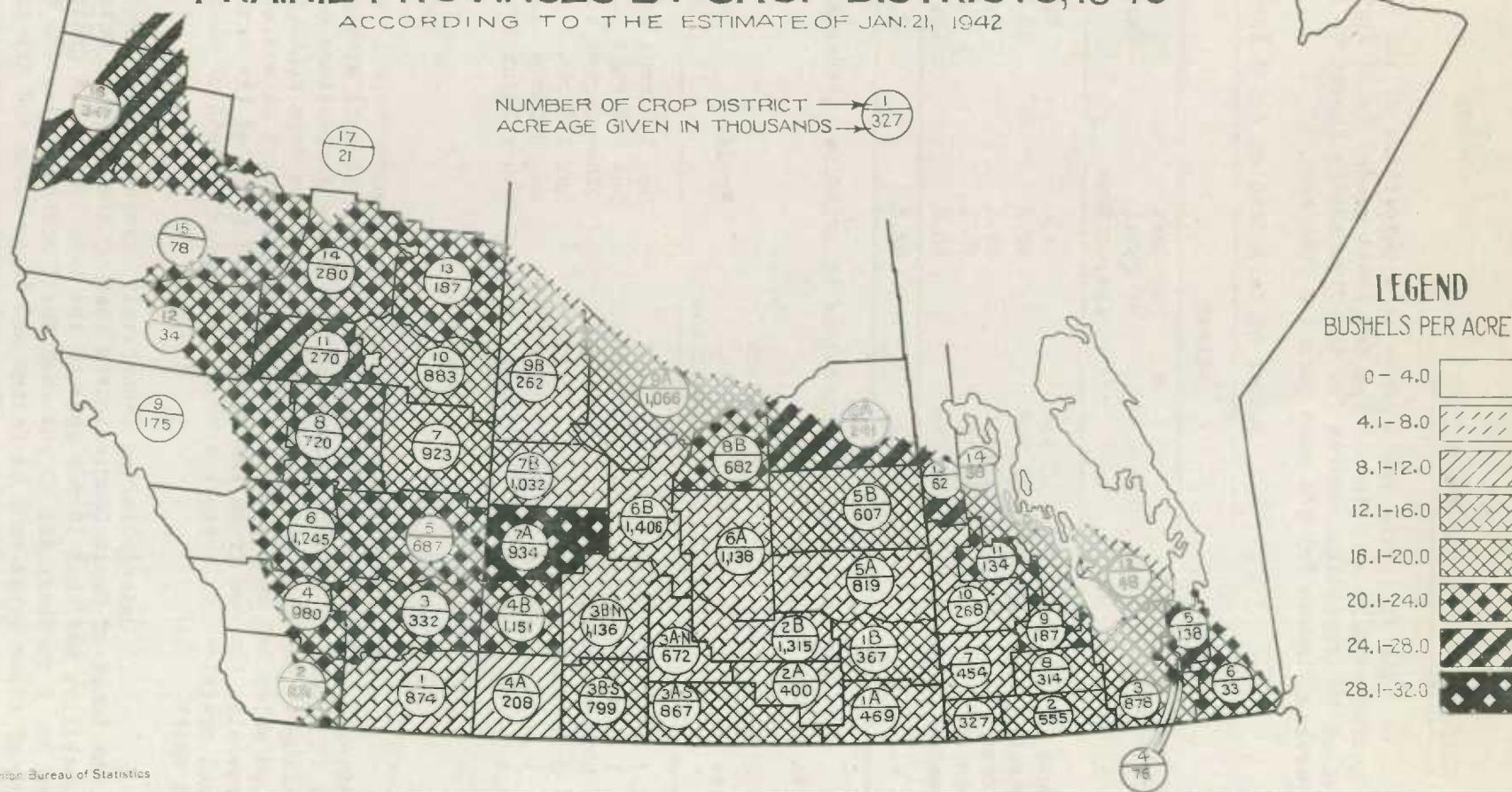
NUMBER OF CROP DISTRICT — 13  
ACREAGE GIVEN IN THOUSANDS — 61





# AVERAGE YIELDS PER ACRE OF WHEAT IN THE PRAIRIE PROVINCES BY CROP DISTRICTS, 1940

ACCORDING TO THE ESTIMATE OF JAN. 21, 1942





## II. GRADING OF THE 1941 WHEAT CROP

The following table shows as a percentage of the total cars inspected, the number of cars of both old and new wheat graded No. 3 Northern or better as revealed by inspection returns for the five months August to December 1941 with comparable figures for the same period a year ago.

	Number of Cars Grading No. 3 Northern or Better			
	1941-42		1940-41	
	Cars	Per Cent of Total Inspections	Cars	Per Cent of Total Inspections
August .....	13,918	94.0	9,919	89.3
September .....	16,247	95.2	18,900	95.0
October .....	11,648	84.1	9,601	94.7
November .....	14,101	73.1	5,343	84.6
December .....	9,732	65.8	14,928	76.9
T o t a l s .....	65,646	82.3	58,691	87.8

The breakdown of inspections by principal grades and types of wheat is shown in the following table:

Grade	Per Cent of Total Inspections	Grade	Per Cent of Total Inspections
No. 1 Hard .....	.01	No. 1 Garnet .....	.20
No. 1 Northern .....	30.86	No. 2 Garnet .....	.25
No. 2 Northern .....	37.79	Other Garnet .....	.16
No. 3 Northern .....	13.60	No. 1 Durum .....	.03
No. 4 Northern .....	1.59	No. 2 Durum .....	.46
Tough .....	12.63	Other Durum .....	.56
	<u>96.48</u>		<u>1.66</u>

It will be seen that quite a large percentage of the total cars of wheat inspected in the five months August-December 1941 fell within the higher grades, but it should be clearly understood that these inspections do not reflect the grading of the 1941 wheat crop since many of the cars contained wheat from previous crops which had been held back in country elevators in western Canada. In many cases also the new grain was mixed with old grain of the same grade and it was found practically impossible to be definitely certain of what was new and what was old wheat.

In October it was tentatively forecast by the Grain Research Laboratory of the Board of Grain Commissioners that on the basis of data then available, the probability was that 10 per cent of the 1941 crop would grade No. 1 Northern, 35 per cent No. 2 Northern and 30 per cent No. 3 Northern, leaving 25 per cent to take care of other types such as Garnet and Amber Durum and the lower and off-grades. It will not be possible to confirm this through the inspection returns for the reasons already stated but it will be noted that the Laboratory's forecast allows for 75 per cent of the crop grading No. 3 Northern or higher and after allowing for Garnet and Durum wheat the percentage of low grade wheat would be quite small.

### III. RAIL SHIPMENTS FROM FORT WILLIAM

Interest in the rail movement of wheat of western origin to points in eastern Canada is greater than usual this season because of the Government's freight assistance plan for western grain shipped from Fort William-Port Arthur which will be used for the feeding of live stock and poultry in Ontario, Quebec and the Maritime provinces. The Federal Government has undertaken to pay \$4.50 per ton on certain specified grains and feeding stuffs shipped to within the Montreal Freight Rate Zone and on shipments beyond that zone will pay the balance of the actual carlot through freight charges from the Head of the Lakes or Armstrong to the point of destination.

Figures covering wheat only show that the volume shipped by rail from Fort William-Port Arthur during the five months August-December 1941 was greater than the movement for the entire season of 1940-41. Past records show that a certain amount of western wheat comes east by rail every year to flour mills, feed plants and manufacturers, while some also moves this way to the eastern United States. The detail of disposition for the current season is now being worked out and will be made available later but the following table compiled in collaboration with the Statistics Branch of the Board of Grain Commissioners shows the total movement in the August-December period this season and last:

	1941-42		1940-41	
	Common Wheat	Amber Durum	Common Wheat	Amber Durum
	(bushels)			
August .....	48,098	42,025	1,233	13,975
September .....	115,210	28,606	3,548	8,458
October .....	183,135	26,242	1,805	4,667
November .....	433,636	39,558	34,181	4,053
December .....	1,357,592	129,168	155,895	26,078
T o t a l .....	2,137,671	265,599	196,662	57,231

In the absence of details it is assumed that while there has been an increase in the feeding of western wheat in eastern Canada this season there has also been an increase in the purchases by the smaller eastern flour mills which have been unable to obtain their requirements of Ontario wheat from the short 1941 crop and are finding reluctance on the part of Ontario farmers to exchange Ontario winter wheat for prairie wheat. Millers are reported to be offering to trade car for car with a cash bonus of 25 to 30 cents per bushel but are finding it hard to convince Ontario farmers that this is good business. Among the reasons cited by farmers for their lack of interest is that they are not accustomed to feeding Manitobas or that they think their own wheat has better feeding value. Not all farmers are passing up the opportunity to trade and make a cash profit, however, and in a number of districts a fair business has been done. There is little doubt that some of the wheat already shipped from Fort William-Port Arthur was moved in anticipation of a better response from Ontario farmers on an exchange of wheat.

Returns covering the January movement of wheat and other grains by rail from the lakehead indicate that the volume is increasing and that wheat from western Canada continues to hold a prominent place in the shipments.



#### IV. PRIMARY MOVEMENT

The following table shows primary receipts of wheat in the Prairie Provinces for the 1941-42 crop year along with comparative figures for 1940-41:

Week ending	Manitoba	Saskatchewan	Alberta	Totals	Last Year
	(bushels)				
August 1-8	233,953	185,573	475,343	894,869	2,644,119
15	1,058,592	1,625,647	941,293	3,625,532	4,702,436
22	1,585,939	3,175,816	1,504,876	6,266,631	10,322,287
29	1,902,244	4,532,417	1,837,896	8,272,557	15,153,697
September 5	1,260,321	4,022,305	1,155,369	6,437,995	16,958,385
12	381,573	4,143,005	1,220,869	5,745,447	16,557,664
19	1,071,540	5,530,119	1,574,739	8,176,398	29,004,674
26	1,291,556	4,901,461	1,397,168	7,590,185	34,523,035
October 3	705,887	4,013,644	1,380,813	6,100,344	24,739,670
10	1,032,456	4,502,758	1,250,205	6,785,419	12,866,908
17	1,327,425	5,130,608	2,497,553	8,955,586	13,996,674
24	2,933,196	5,692,549	4,579,570	13,205,315	16,189,654
31	2,032,726	5,726,654	3,921,340	11,680,720	11,578,885
November 7	1,475,991	4,125,897	2,828,511	8,430,399	6,743,125
14	1,745,473	3,331,334	2,857,465	7,934,272	7,508,726
21	1,408,094	3,569,290	2,592,017	7,569,401	9,496,207
28	1,054,838	1,794,486	1,835,392	4,684,716	10,173,053
December 5	1,685,625	2,972,117	2,490,514	7,148,256	10,874,279
12	1,634,886 <sup>1/</sup>	2,723,229 <sup>1/</sup>	2,834,878 <sup>1/</sup>	7,192,993 <sup>1/</sup>	9,693,336
19	1,390,142	2,236,281	2,143,712	5,770,135	8,524,795
26	704,826	1,779,699	1,733,559	4,218,084	8,580,045
January 2	701,149	1,485,970	1,143,478	3,330,597	6,758,260
9	353,414	621,502	825,735	1,800,651	3,039,974
16	388,365	796,939	993,093	2,178,397	5,787,214
T o t a l s	29,360,211	78,619,300	46,015,388	153,994,899	296,417,102

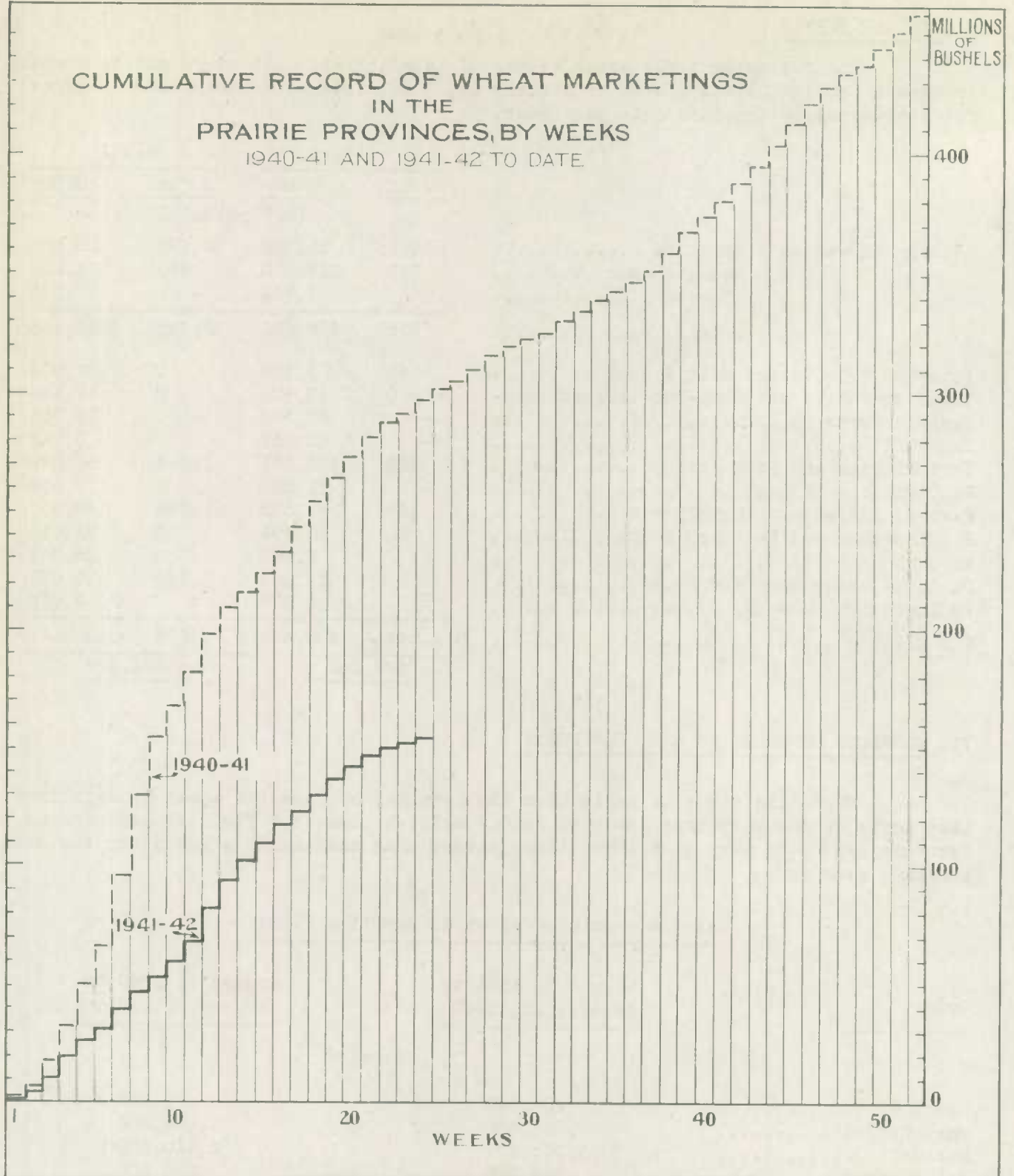
<sup>1/</sup> Revised since last issue of this Review.

On the basis of the revised estimates of wheat production in western Canada in 1941, the deliveries from farms in the twenty-four weeks ending midnight January 15, 1942, represented about 55 per cent of the total produced. Saskatchewan leads the other provinces in percentage of deliveries to size of crop and has marketed 57.7 per cent of her estimated production, while Manitoba is next with 54 per cent and Alberta is trailing with 52 per cent delivered. At this time a year ago, the deliveries from farms represented 57.7 per cent of the total produced.

In view of the programme of wheat feeding forecast for western Canada this season which amounts to 44 million bushels compared with 32.1 millions a year ago and the fact that seed requirements also have to be deducted from the stocks still on farms, it is probable that deliveries to market will taper off steadily during the remaining twenty-eight weeks of the crop year.



CUMULATIVE RECORD OF WHEAT MARKETINGS  
IN THE  
PRAIRIE PROVINCES, BY WEEKS  
1940-41 AND 1941-42 TO DATE.



## V. VISIBLE SUPPLY

The following table shows stocks of Canadian wheat in store and in transit in Canada and the United States on January 16, 1942 along with comparative figures for approximately the same date last year.

	1942		1941	
	Durum	Other	Durum	Other
	(000 bushels)			
Country Elevators - Manitoba .....	495	30,080	2,065	28,580
Saskatchewan .....	240	118,910	880	124,880
Alberta .....	-	79,700	-	73,375
Totals .....	735	228,690	2,945	226,835
Interior Private and Mill Elevators .....	42	6,188	51	7,970
Interior Public and Semi-Public Terminals.	0	17,900	0	17,636
Pacific Ports .....	-	20,322	-	19,767
Churchill .....	-	2,617	-	2,617
Fort William and Port Arthur .....	586	105,571	1,344	81,599
In Transit - Rail .....	-	11,553	-	9,058
Eastern Elevators - Lake Ports .....	159	46,533	1,176	49,356
St. Lawrence and Seaboard Ports .....	22	28,696	1,411	21,614
U. S. Lake Ports .....	-	9,865	-	26,989
U. S. Atlantic Seaboard Ports .....	-	11,682	1,749	19,073
In Transit - U. S. A. ....	-	6,827	-	3,015
T o t a l s .....	1,544	496,444	8,676	485,529
	<u>497,988</u>		<u>494,205</u>	

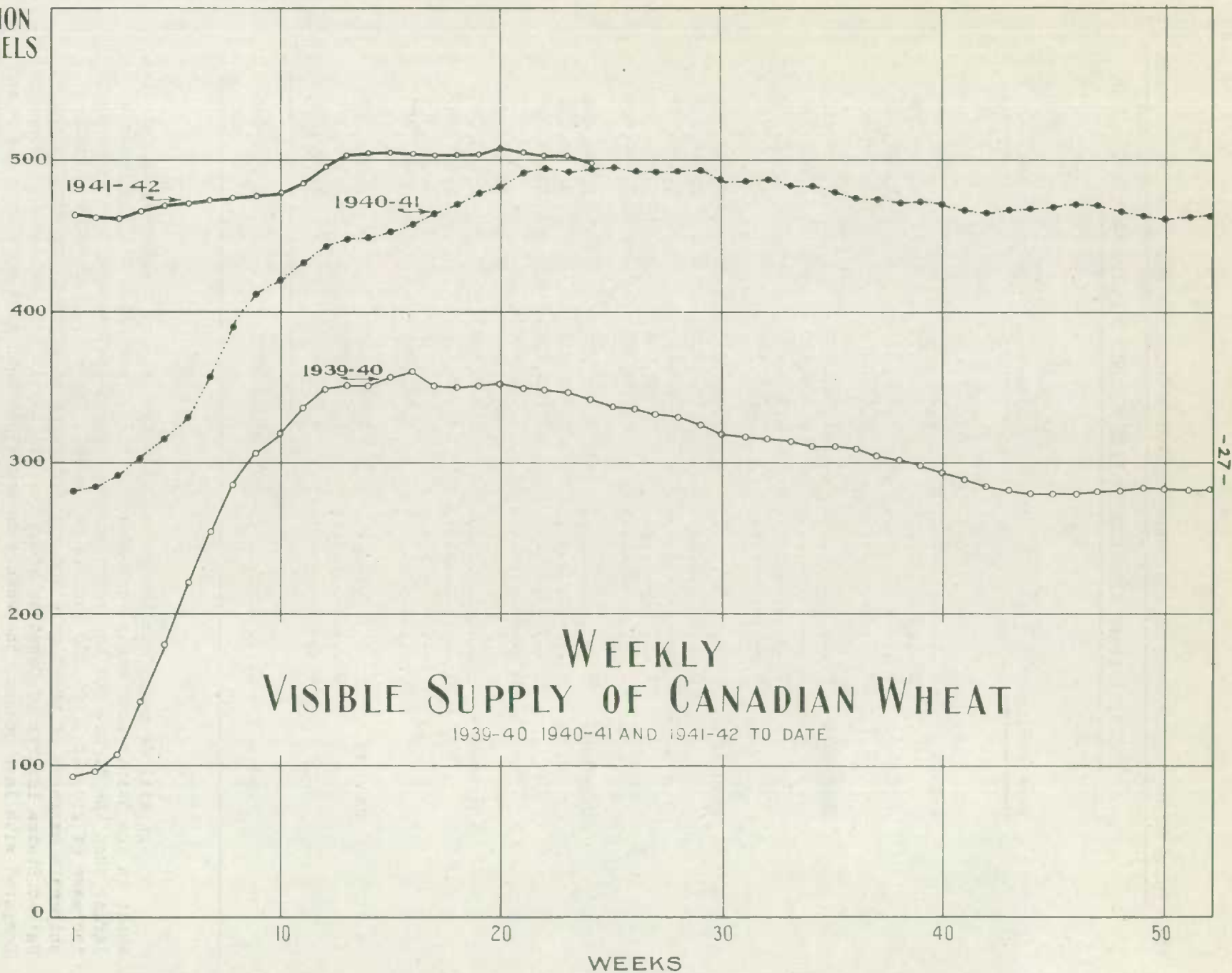
## VI. MOVEMENT OF WHEAT TO MARITIME PORTS

Since the close of navigation the movement of Canadian wheat by rail from Lake ports to the Maritimes amounted to 6.2 million bushels. The rail movement so far this season is more than three times larger than the amount shipped for the same period a year ago.

### Rail Shipments of Wheat to Maritime Ports

Origin	August 1, 1941 to January 15, 1942	August 1, 1940 to January 16, 1941
	(bushels)	
Depot Harbour .....	100,000	6,840
Port McNicoll .....	7,544,786	3,834,306
Midland .....	13,065,307	2,440,002
Collingwood .....	966,788	520,256
Owen Sound .....	2,044,836	434,326
Goderich .....	3,286,653	1,439,927
Sarnia .....	1,016,462	-
Port Colborne .....	414,060	227,208
Prescott .....	87,500	7,684
Montreal .....	198,372	-
Toronto .....	-	1,161
T o t a l s .....	28,724,764	8,911,710

MILLION  
BUSHELS





VII. TOTAL EXPORT CLEARANCES OF CANADIAN WHEAT FROM CANADIAN AND AMERICAN SEABOARD  
PORTS, 1941-42 WITH COMPARATIVE FIGURES FOR 1940-41.

<u>Week ending</u>		<u>1941-42</u>	<u>1940-41</u>
		(bushels)	
August	1-8 .....	2,115,587	1,506,622
	15 .....	3,455,376	1,059,383
	22 .....	2,682,273	1,947,542
	29 .....	2,853,324	2,861,338
September	5 .....	1,535,797	2,457,281
	12 .....	2,250,178	895,148
	19 .....	2,874,290	1,532,713
	26 .....	3,398,467	1,160,710
October	3 .....	1,683,514	2,082,555
	10 .....	2,967,703	1,062,178
	17 .....	2,186,116	1,594,706
	24 .....	2,930,042	741,734
	31 .....	2,203,223	2,609,404
November	7 .....	2,346,270	1,846,438
	14 .....	5,744,833	3,014,550
	21 .....	2,333,826	3,558,005
	28 .....	2,541,708	997,865
December	5 .....	3,796,359	2,518,964
	12 .....	4,183,113	1,480,527
	19 .....	3,030,573	2,037,456
	26 .....	1,331,388	811,473
January	2 .....	2,845,407	911,163
	9 .....	2,278,962	3,021,370
	16 .....	4,291,422	1,520,862
T o t a l s .....		67,859,751	43,229,987

It will be seen from the above table that export clearances of Canadian wheat in the twenty-four weeks to January 16, 1942, were 24.6 million bushels larger than the figure for the corresponding period last season, representing an increase of roughly 1,000,000 bushels per week. These figures cover actual shipments overseas of wheat only and are exclusive of wheat-flour exports and United States imports of Canadian wheat for milling in bond or domestic consumption. Compared with last season, the weekly movement has been much more consistent and has never been less than one million bushels in a single week whereas in the same 24-week period of crop year 1940-41 the shipments were under one million bushels in five separate weeks. The weekly average for the present season is 2.8 million bushels compared with 1.8 millions in the corresponding period a year ago.

# VIII. THE STATISTICAL POSITION

The statistical position of Canadian wheat in Canada and the United States as of January 1 this year and last is shown in the following table and indicates a decrease of about 108 million bushels in the balance for export and carry-over compared with a year ago. Home requirements are larger and exports show an increase over last year, while the smaller crop in 1941 more than offsets the increase in carry-over at the beginning of the season. With seven months of the crop year to be accounted for the balance to be disposed of is 553.1 million bushels.

	1940-41	1941-42
	(bushels)	
Carry-over in Canada and the United States		
July 31 .....	300,473,465	480,083,691
New Crop .....	540,190,000 <u>1/</u>	299,401,000 <u>1/</u>
Total Supplies .....	840,663,465	779,484,691
Domestic Requirements .....	125,000,000	140,000,000 <u>2/</u>
Available Supplies .....	715,663,465	639,484,691
Export Movement, August-December		
Overseas Clearances plus United States		
Imports (partly estimated) .....	41,580,188	68,095,957
Flour as Wheat .....	13,072,644	18,249,282
	54,652,832	86,345,239
Balance for Export or Carry-over, January 1	661,010,633	553,139,452

1/ Revised January 21, 1942.

2/ Subject to revision.

Since the last calculation was made a month ago, downward revisions of both the 1940 and 1941 wheat crops have been published. The 1940 crop was lowered 11.2 million bushels in the final estimate and the third estimate of the 1941 crop showed a drop of three million bushels. In each case the Prairie Provinces absorbed the entire change.

Despite the greater reduction in the 1940 estimate the quantity remaining for export and carry-over on January 1, 1942 is still 108 million bushels less than the corresponding figure a year ago and with export clearances during January to date still showing improvement over those of last January, the situation for the first half of the crop year appears to be shaping up quite well.

IX. MONTHLY OVERSEAS CLEARANCES, ETC., IN COMPARISON WITH THE CUSTOMS EXPORTS OF

WHEAT AND WHEAT FLOUR

December exports of wheat and flour, based on overseas clearance records from Canadian and United States ports, amounted to 19,629,662 bushels. This amount is 2.8 million bushels lower than the Customs export total for the month of December which includes Canadian wheat still in bonded warehouses in the United States.

	Overseas Clearances of Canadian Wheat	U. S. Imports of Canadian Wheat for con- sumption and milling in bond	Customs Exports of Canadian Wheat Flour	Totals	Custom Exports of Wheat and Wheat Flour
(bushels)					
<u>1939-40</u>					
August .....	10,547,763	944,372	1,706,742	13,198,877	11,979,671
September .....	12,120,504	693,835	1,874,489	14,688,828	17,515,631
October .....	6,225,133	996,611	1,998,648	9,220,392	18,847,495
November .....	15,218,051	1,030,351	2,577,645	18,826,047	23,212,844
December .....	11,011,279	406,637	4,062,213	15,480,129	38,474,661
January .....	15,946,245	938,657	3,263,922	20,148,824	13,621,527
February .....	13,212,338	827,327	2,517,021	16,556,686	9,115,258
March .....	17,190,619	857,361	3,220,106	21,268,086	11,848,383
April .....	13,753,300	738,565	2,339,415	16,831,280	7,421,151
May .....	18,293,320	821,326	3,251,677	22,366,323	26,717,997
June .....	9,180,759	569,602	2,291,886	12,042,247	15,861,993
July .....	10,004,408	629,854	1,412,388	12,046,650	13,279,904
T o t a l s ....	152,703,719	9,454,498	30,516,152	192,674,369	207,896,515
<u>1940-41</u>					
August .....	8,376,192	592,971	2,590,902	11,560,065	13,992,063
September .....	6,524,601	619,998	2,478,393	9,622,992	11,978,247
October .....	6,610,523	824,580	3,375,868	10,810,971	13,034,755
November .....	9,896,969	735,974	3,072,231	13,705,174	20,349,791
December .....	6,858,081	540,299	1,555,250	8,953,630	13,317,661
January .....	12,841,576	782,729	1,596,681	15,220,986	6,476,761
February .....	14,690,299	689,344	2,730,406	18,110,049	12,190,000
March .....	18,324,872	656,074	2,516,126	21,497,072	14,138,845
April .....	25,988,574	945,113	3,824,172	30,757,859	24,146,572
May .....	28,381,667	2,400,657	6,033,087	36,815,411	35,656,016
June .....	21,999,756	1,205,207	7,879,158	31,084,121	30,992,762
July .....	13,066,057	1,354,411	8,647,448	23,067,916	27,993,781
T o t a l s ....	173,559,167	11,347,357	46,299,722	231,206,246	224,267,254
<u>1941-42</u>					
August .....	12,125,895	1,816,671	6,464,547	20,407,113	21,185,505
September .....	10,705,499	2,004,228	2,974,563	15,684,290	14,315,604
October 3/ .....	11,953,762 1/		1,984,802	13,938,564 1/	13,825,389
November .....	14,046,302 2/		2,639,308	16,685,610 2/	24,744,361
December .....	15,443,600 2/		4,186,062	19,629,662 2/	22,457,104
Aug.-Dec. 1941-42	68,095,957		18,249,282	86,345,239	96,527,963
Aug.-Dec. 1940-41	38,266,366	3,313,822	13,072,644	54,652,832	72,672,517

1/ Revised. 2/ Subject to revision. 3/ U.S. Imports no longer shown separately.





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