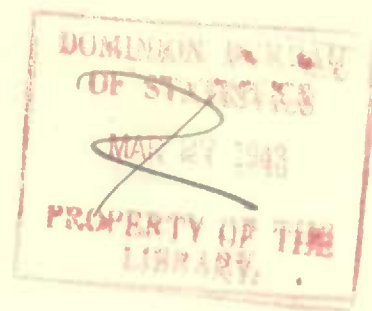


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MONTHLY REVIEW OF THE WHEAT SITUATION

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(Issued March 1943)

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THE WORLD WHEAT SITUATION - SUMMARY

March has been a month of unexpected happenings in North American wheat markets. Prices have shaken themselves free of the fetters to which a heavy surplus of wheat supplies has bound them for many months and values have risen to levels unmatched in years both in Canada and the United States. At Winnipeg the price of wheat advanced to \$1.00 per bushel (basis in store Fort William), its highest level since the summer of 1938, while at Chicago a price of \$1.50 per bushel quoted for September futures was the best price seen on the board since 1929.

This transformation from dull to extremely active markets appeared to develop from projections on the wheat statistical situation rather than from any real change in the immediate supply position. United States developments furnished most of the ammunition, first by the announcement that wheat marketing quotas had been lifted for the balance of the 1942-43 crop year and for the whole of the 1943-44 crop season, and secondly on evidence that a heavy volume of wheat is likely to be fed to animals in the United States during 1943.

It was announced by Secretary of Agriculture Wickard that the 125 million bushels of wheat which Congress had authorized the Commodity Credit Corporation to sell for animal feed had been fully disposed of and that authority was being sought to sell a further 100 million bushels. This has now been granted by Congress with the proviso that the new sales be made at prices equal to the full parity price of corn instead of at 85 per cent of corn parity, the price obtained for the first 125 million bushels on which a loss of nearly \$44 million was sustained.

The heavy diversion of wheat to animal feeding, plus the pick up in export shipments to the armies abroad and under lend-lease, caused earlier estimates of total disappearance of United States wheat in the crop year 1942-43 to be revised sharply upward. Latest estimates of wheat disappearance, both domestic and export, now range from 950 to 1,000 million bushels compared with the official estimate of 750 million bushels indicated only a few months ago.

No important change had, in the meantime, taken place in the Canadian supply position, but the widening spread between Chicago and Winnipeg prices coupled with the more bullish views of the American trade resulted in heavy buying of Winnipeg futures. Thus, the Canadian market joined in the general upward movement of price levels and was given additional support by fresh export buying, which trade reports credited to neutral countries.

Wheat developments outside of North America are not particularly noteworthy. A dull situation is reported from Argentina where the new crop of considerable size and excellent quality is not being sold very freely by growers. Advices from Australia are without feature and the improvement in crop conditions in India appears to have lessened the possibility of large exports of Australian wheat to that country. The new harvest is now being gathered in India and very favourable weather in the closing days of the growing season seems to have worked wonders with the crop, which for a time was very unpromising.

An unusually favourable winter in the United Kingdom has resulted in fall-sown crops showing appearance of excellent condition, while spring work is off to a good start with every hope of acreage objectives being reached. Further restriction of imports of wheat-flour from overseas is seen in the new order dated late February which, according to a special cable to the "Northwestern Miller" of Minneapolis, permits only 7 1/2 per cent of white flour to be used in National bread and flour products. Some 25 per cent was previously permitted.

Of conditions on the European continent there is little in the news. The thaw has come earlier than usual to eastern zones and field work is in progress, but the shortage of manpower and fertilizer loom up again as factors of great importance quite apart from weather conditions. The shortage of bread grains is acute in many countries and even the Germans are reported to be eating bread which contains no wheat flour. The loaf in Germany is now reported to be 75 per cent rye flour and the balance barley meal and potato flour.

The see-saw of battle in eastern Russia places the rich Ukraine further out of Soviet reach at the moment but plans are said to be well advanced for making full use of the recaptured North Caucasus territory this spring. The importance of this area in the Soviet wheat belt was indicated in the February Review. It has been reported also that the grain acreage goals for 1943 in the whole of the Soviet Union aim at an increase of 9.6 million acres over last year.

Wheat Situation in Canada

In Canada, the movement of wheat from western farms continues at a very moderate rate. Deliveries during the first 33 weeks of the current season totalled about 173 million bushels, leaving approximately 107 millions to be delivered from the 1942 crop if the total delivery quota for the crop year 1942-43 of 280 million bushels is to be filled by July 31.

Last season at the same date, western growers had delivered more than 70 per cent of the year's quota of 230 million bushels, but the marketings to date this season are only about 62 per cent of the total delivery quota of 280 million bushels. The late harvest in 1942 and the severe winter have contributed in some measure to the slow rate of marketings this season.

Censorship restrictions on export figures make it impossible to tabulate the complete statistical position of Canadian wheat, but on the basis of the last official estimate of production in 1942 and recently published estimates of disappearance of wheat during the crop year 1942-43, the carry-over on July 31, this year will be very substantially greater than the 434 million bushels carried over at the beginning of the year.

It has been difficult this season to estimate the amount of wheat likely to be fed to animals in view of the very large quantities of other feed grains available on farms, but the estimate of farm stocks of wheat to be compiled as of March 31, 1943, should afford a means of measuring the extent of wheat feeding to live stock in the crop year 1942-43. There is evidence in the freight subsidy plan, which is discussed elsewhere in this Review, that western wheat continues to move to the five eastern provinces and to British Columbia for animal feeding purposes in quite substantial quantities.

Provincial authorities are now campaigning in the west for attainment of the acreage goals established at the Dominion-Provincial conference in Ottawa last December. These goals call for a reduction of 2.7 million acres in the wheat acreage of the three Prairie Provinces, and the use of this acreage for increased sowings to oats, barley and grass crops.

CALENDAR OF WHEAT EVENTS

1943

- March 1 Mild weather prevails in Europe and fall-sown crops are further advanced than usual while ploughing is reported from some sections.
- 2 Reports from Russia indicate that plans have been made for soil preparation in reoccupied areas of the Caucasus.
- 3 Wheat futures prices at Chicago passed the \$1.50 per bushel mark to register the highest level in years.
- 4 Portugal continues to show interest in Canadian wheat and is reported to be in the Winnipeg market for 1,000,000 bushels.
- 5 The sale of a further 100 million bushels of United States wheat for feed has been approved by the House Agricultural Committee but the price for this lot, if the Committee's vote is approved, will be full parity price of corn instead of 85 per cent of parity at which the first 125 millions were sold.
- 6 Figures released today show that the C.C.C. had made loans on 405.4 million bushels of 1942 wheat but more than 25 millions of this had been liquidated.
- 8 May wheat at Winnipeg showed a net gain of 4 cents per bushel during the first seven days of trading in March.
- 9 The wheat surplus in Argentina as of March 6, is estimated at 287 million bushels compared with 236 millions a year earlier.
- 10 India's new wheat harvest will soon be under way and a good outturn is expected, according to trade advices.
- 11 Sweden reports that fall-sown acreage to bread grains in 1942 for harvest this year was the smallest in half a century. The late harvest last year was the principal factor in the decreased sowings.
- 12 Wheat acreage may be further reduced in Australia according to Broomhall comment but any reduction will probably be confined to the low yielding areas.
- 13 Broomhall reported a good business in Canadian wheat to the United Kingdom and the Winnipeg price continues to advance.
- 15 Both Argentina and Australia are now preparing for the sowing of a new wheat crop. The fall season has arrived in both countries.
- 16 Spring ploughing is well advanced in the United Kingdom and wheat is expected to occupy a considerably larger area than a year ago.
- 17 July wheat at Winnipeg advanced to more than \$1.00 per bushel to reach the highest price level since July 1938.
- 18 The visible supply of Canadian wheat as of March 11, is shown at 443 million bushels in an official report issued today. A year ago it was 471.6 millions. These figures exclude wheat still held on farms.
- 19 Spring wheat acreage in the United States according to farmers' intentions for 1943 is reported at 14,707,000 acres compared with 14,194,000 acres seeded a year ago.
- 20 Authority has been granted to the C.C.C. by the United States House of Senate to sell an additional 100 million bushels of wheat for animal feed at corn parity prices which on February 15, averaged about \$1.03 per bushel on the farm.
- 22 Commercial stocks of wheat in Argentina on March 1, totalled 290 million bushels compared with 250 millions a year earlier. The bulk of this wheat was in the hands of country dealers.

PRICES

Reflecting strength at Chicago as well as investment and foreign buying, wheat futures prices at Winnipeg soared to their highest levels since July 1938 and for the first time in almost five years a price of \$1.00 per bushel (basis in store Fort William) was recorded in the leading Canadian market. Trade reports indicated that buying orders from Chicago were quite substantial but there was evidence also of exports sales of sizeable quantities.

Cash wheat prices moved up with the futures and No. 1 Northern wheat traded at levels considerably above the Canadian Wheat Board's initial price of 90 cents per bushel. Low grade wheat continued to show strength and was quoted at relatively narrow spreads under top grades.

Weekly Average of Daily Closing Cash Prices at Winnipeg (basis in store Fort William-Port Arthur)

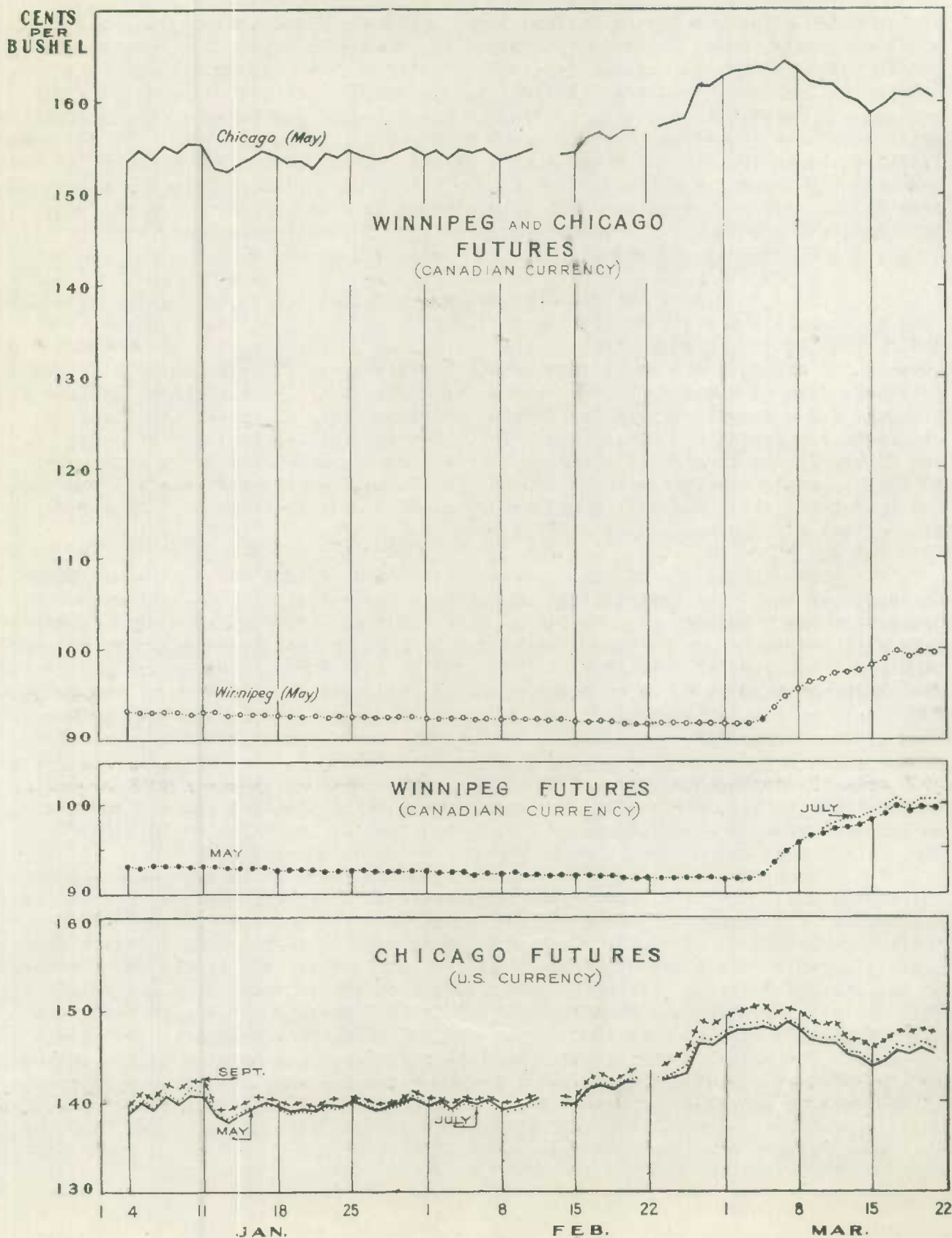
<u>Grade</u>	<u>Feb. 25</u>	<u>Mar. 4</u>	<u>Mar. 11</u>	<u>Mar. 18</u>
	(cents and eighths per bushel)			
No. 1 Northern	90/4	90/5	94/5	97/5
No. 2 Northern	87	87/1	91/1	94/1
No. 3 Northern	85/3	85/2	89/1	91/6
No. 4 Northern	83/3	83/5	88/2	90/6
No. 5 Wheat	80/5	80/7	85	87/5
No. 6 Wheat	79/7	80/2	84/4	87/1
Feed Wheat	78/7	79/2	83/4	86/1
Tough 1 Northern	88/6	88/7	92/7	95/7
Tough 2 Northern	85/2	85/3	89/3	92/3
Tough 3 Northern	83/7	83/6	86/7	89/4
No. 1 C.W. Garnet	87/7	87/6	91/5	94/3
No. 2 C.W. Garnet	86/7	86/6	90/5	93/3
No. 3 C.W. Garnet	85/3	85/2	89/1	91/7
No. 1 A. Red Winter	91/7	93/6	96/6	95/2
No. 2 Red Winter	91/7	93/6	96/6	95/2
No. 3 Red Winter	89/7	91/6	94/6	93/2
No. 1 C.W. Durum	107/7	107/7	112/4	116/3
No. 2 C.W. Durum	107/7	107/7	112/4	116/3
No. 3 C.W. Durum	105/7	105/7	110/4	114/3

Chicago Prices

Impressed by the heavy disappearance of wheat for animal feeding purposes, the Chicago wheat market moved up to pass the \$1.50 mark for September futures while cash wheat sold at substantial premiums over the futures. Government purchases of wheat-flour and the resulting improvement in flour milling operations also influenced the market.

Price records indicate that recent quotations for wheat futures at Chicago were the highest since the year 1929. One result of the higher wheat prices in the United States has been the redemption of loans by farmers.

DAILY CLOSING WHEAT FUTURES QUOTATIONS IN LEADING MARKETS



UNITED STATES

The rapid consumption of wheat for animal feed continues to be a feature of the wheat situation in the United States. There are indications that the 125 million bushels, which Congress authorized the Commodity Credit Corporation to sell in the fiscal year just ending, has been disposed of, and the Secretary of Agriculture has asked for authority to sell an additional 100 million bushels. This request was dealt with by the Agricultural Committee of the House of Representatives, which gave it approval but insisted on a higher price being obtained. It had been intimated by the President of the C.C.C. that a loss of almost \$44 million had been sustained by the Corporation in the sale of the original 125 million bushels which went on the market at a price equal to 85 per cent of the parity price of corn, but the Committee's vote for the release of a further 100 million bushels was conditional on a price being obtained equal to 100 per cent of corn parity.

Domestic disappearance of wheat in the United States during the crop year 1942-43 was estimated in the closing months of 1942 at 750 million bushels, but the most recent estimates both official and unofficial point to a disappearance of between 950 millions and one billion bushels, this heavy increase being attributed to the feeding of wheat on farms, the use of wheat in the production of industrial alcohol, and a very considerable increase in the milling of wheat into flour for export to the armies and under lend-lease. The statistical position of wheat in the United States is greatly altered on this account, and whereas the carry-over on July 1, 1943, was estimated at 860 million bushels as recently as last December, the latest estimates range from 615 to 700 million bushels compared with a carry-over of 627 million bushels on July 1, 1942.

Some indication of the official view of the change that has taken place in the wheat supply situation is to be found in the suspension of wheat marketing quotas for the remainder of the 1942-43 marketing year and for the whole of 1943-44. This will enable farmers who have wheat on their farms, but were unable to deliver it without penalty, to release these supplies at once for sale on the market or for feed. At the same time, wheat farmers who in 1943 plant 90 per cent of the war crop goals will be eligible for wheat payments and wheat loans under the A.A.A., even if they exceed their wheat allotments. The announcement comes too late for winter wheat farmers to do anything about it with respect to acreage for harvest in 1943, but the spring wheat growers will be permitted to boost their acreage after compliance with war crop goals. It is currently estimated in trade circles that an increase of 3 or 4 million acres in spring wheat may be expected this year.

The winter wheat crop, generally speaking, appears to have come through the winter fairly well, although some areas have persistently reported heaving as the result of alternate freezing and thawing. The first official report on indicated production of winter wheat will be made on April 9, but the last official indication which was based on December 1, 1942 conditions, was in the neighbourhood of 625 million bushels, or approximately 11 per cent less than the big crop of 1942. This estimate was based on an average yield of 16.7 bushels per seeded acre, compared with 18.3 bushels realized in 1942 and the 10-year average of 11.8 bushels per acre. The extent of winter-kill will have an important bearing on the outcome, and while very severe cold was experienced on occasion, most of the crop appears to have been adequately protected by snow. Recent reports indicate moisture deficiency in Oklahoma and general dryness of top soil in parts of Texas, but the news from Kansas is mostly of a favourable character.

As previously mentioned, the production of flour in the United States has been on a much heavier scale recently and a Government agency has been a very substantial buyer of wheat-flour, much of it enriched, for shipment to the armed forces, as well as to Russia and other countries. Figures recently published in connection with lend-lease shipments show that flour purchases for the Russian army amounted in January to more than 1,000,000 barrels. This flour also was enriched, according to the report of the Food Distribution Administration. Other figures in the report show that during 1942 a total of 2 1/2 million barrels of flour was purchased for lend-lease, while the amount purchased since the programme first began, up to and including January 1943, was approximately 5 million barrels of white flour, in addition to more than a million barrels of Graham flour, rye flour and corn flour. The January report of the Flour Milling Industry in the United States shows that mills operated at almost 77 per cent of total capacity, compared with 68 per cent in December, and less than 60 per cent last August.

Wheat Under Loan

Wheat from the 1942 crop on which loans had been made up to March 6, 1943, totalled 405.5 million bushels but at that date more than 36 million bushels had been liquidated, leaving a net figure of 369.5 million bushels. It was pointed out by Secretary of Agriculture Wickard, however, in his statement before the House Committee on Agriculture, that the C.C.C. owned on February 24, 1943, some 200 million bushels of wheat in addition to another 420 million bushels on which loans were still outstanding at that date. This would, of course, include 1942 wheat and the product of previous years. It is from this 200 million bushels owned by the C.C.C. that Secretary Wickard wanted 100 millions to sell for feed.

The amount of 1942 loan wheat stored in warehouses on March 6, was about 222 million bushels, and these loans mature on April 30. No decision has been announced regarding the disposition of this wheat but it is presumed that the C.C.C. will take over the bulk of it. In the case of farm-stored loan wheat, however, the 1942 loans were made for two years for wheat held in this position and on March 6, the amount stored on farms was 183.4 million bushels. The average amount advanced on all loan wheat of the 1942 crop stands at \$1.13 per bushel but this includes some transportation charges from farms to warehouse locations as well as storage advances on farm-stored wheat.

Export Subsidy

On December 2, 1942, the Department of Agriculture announced an export subsidy of 20 cents per bushel on wheat exported from Continental United States to Mexico and other countries in the American zone. This was increased to 25 cents per bushel on January 26, 1943, and the programme was to have expired on March 9. It is now reported in trade circles that the Food Distribution Administration is likely to continue the subsidy.

Total sales under the programme since the early part of January amount to more than 5,000,000 bushels, mostly to Mexico but the demand from this neighbouring country has now petered out and, in any case, transportation difficulties between the United States and Mexico have arisen out of a recent order of the Interstate Commerce Commission which forbids shipment of more cars into Mexico than are returned.

The export subsidy on wheat-flour to certain countries has been in effect for some years but the rate to some countries has been increased to \$2.00 per barrel of 196 pounds, effective March 11, 1943. Previously it was \$1.60 per barrel.

ARGENTINE LETTER

The correspondent of the Dominion Bureau of Statistics in Buenos Aires has forwarded the following report under date of March 11, 1943:-

Cutting and threshing of wheat have terminated throughout the country with heavy yields and good quality foreseen in previous reports. The dry weather to the end of February caused serious difficulty in the ploughing and cultivating of land which is to be planted to winter grains, especially in Cordoba and the south-west of Buenos Aires, as well as in the Pampa regions in which the lack of natural pasturage, as a consequence of the drought, makes urgent the necessity for providing cultivated forage crops.

Wheat Supplies

Second official estimate 1942-43 crop	235,156,000 bushels
Carry-over from 1941-42 crop	159,875,000 "
Total supplies	395,031,000 "
Deduct for seed and domestic consumption	101,044,000 "
Surplus available for export	293,987,000 "
Shipments) Wheat..... 9,808,000 bushels	
to Feb. 28) Wheat as flour .. 150,000 "	9,958,000 "
Balance still available	284,029,000 "

The above shows the statistical situation as the month of March opened, and the balance available for exportation is substantially in line with figures published by the Ministry of Agriculture, although it is much higher than the views of some members of the grain trade.

Shipments during February were rather higher than those of January. Wheat in grain totalled 5,484,000 bushels, to which must be added 61,000 bushels of flour in terms of wheat, adding up to 5,545,000 bushels, which compares with 4,413,000 bushels in the preceding month.

There is no change to report in market conditions. Brazil is still the principal purchaser of Argentine wheat, with Spain running second. The United Kingdom, with a good crop of her own, is showing no interest in foreign wheat other than that available in Canada, with a geographical advantage over the River Plate, but less advantage than usual in the matter of quality, this season's Argentine wheat being of very high grade.

Inferior wheat of previous crops, still in the hands of the Grain Board, has been made available for sale locally to stockmen in the drought-stricken areas where feed grain is needed. The price fixed is that paid to producers a year ago for the same grain, 6.75 pesos per 100 kilos, or say 54 3/4 cents United States per bushel.

The Board is open to purchase new crop wheat at the same price but there is no great rush by the farmers to sell. Except where yields have been high, the producers say they are left with a loss, and their dissatisfaction is increased by

the knowledge that Canadian farmers receive 50 per cent more for their wheat, and wheat in the United States is worth about 17. pesos as compared with 6.75 in the Argentine.

The Grain Board's selling price of wheat of the new crop is 7.6 pesos per 100 kilos, in bulk, in the port of Buenos Aires.

There is much talk of shipping Argentine wheat to India in Argentine ships, which would bring back bags or bag material for handling the next crop.

AUSTRALIA

In the absence of official advices from Australia only trade reports are available this month. These indicate that preparations for the seeding of the next crop are well advanced and that moisture conditions on the whole are satisfactory. Rainfall up to the middle of March had been spotty and a little below normal in Western and South Australia, but in New South Wales and Victoria the rainfall had been up to average and in these two states about half the wheat acreage is located.

For a time it looked as though Australian wheat might be shipped to India in considerable volume but the recovery of India's wheat crop has been excellent and there does not now appear to be the need for importing any large amount of wheat from abroad. This will leave Australia with a substantial surplus with few markets available, but the domestic demand is increasing for wheat and other foodstuffs as the result of a larger garrison of troops both in Australia itself and adjacent islands.

It was indicated in earlier reports that further restriction of wheat acreage is likely for the crop of 1943-44, especially with respect to poor land. It is unlikely, however, that the reduction will be very large in view of the adjustments made in recent years. The acreage licensed for wheat growing last year was 10.9 million acres, which was about 15 per cent less than the year previous.

The wheat areas licensed and sown by States during the past two crop years are tabulated below:

	1941-42		1942-43	
	<u>Acres Licensed</u>	<u>Acres Sown</u>	<u>Acres Licensed</u>	<u>Acres Sown ^{1/}</u>
	million acres			
New South Wales .	4.3	4.0	3.7	
Victoria	2.9	2.8	2.6	
Queensland	0.5	0.4	0.4	
South Australia .	2.5	2.3	2.4	
West Australia ..	2.7	2.7	1.8	
T o t a l s	12.9	12.2	10.9	

^{1/} The area actually sown in 1942 has not yet been received in detail.

It will be noted that Western Australia showed the largest decrease in acreage in 1942. This reduction was compulsory due to the surplus on hand in that area and the difficulties of disposing of it.

Monthly Average Winnipeg Cash Price - No. 1 Northern Wheat,
Crop Years 1935-36 to 1942-43

	(cents per bushels)							
	1935-36	1936-37	1937-38	1938-39	1939-40	1940-41	1941-42	1942-43
August	84.5	102.2	131.8	76.6	54.9	72.2	73.3	88.9
September .	90.3	103.9	133.6	63.3	73.9	71.7	72.6	89.6
October ...	90.8	110.9	142.3	61.5	70.3	70.4	73.7	90.0
November ..	85.7	108.4	134.6	59.0	70.5	71.8	73.2	90.5
December ..	84.7	120.2	137.4	60.6	82.4	73.4	74.4	90.4
January ...	84.8	124.7	149.1	59.9	82.8	74.2	77.0	90.4
February ..	82.1	127.0	144.6	60.4	83.8	75.2	78.0	90.5
March	82.1	135.7	138.4	59.5	87.0	76.2	78.0	
April	80.5	138.9	138.4	60.5	89.2	75.7	79.0	
May	76.8	130.6	115.2	65.5	79.7	75.9	79.3	
June	79.5	124.2	114.3	61.8	72.3	77.0	80.0	
July	93.4	145.6	98.4	55.3	71.4	74.7	80.8	

Wheat Prices and the General Price Level 1/

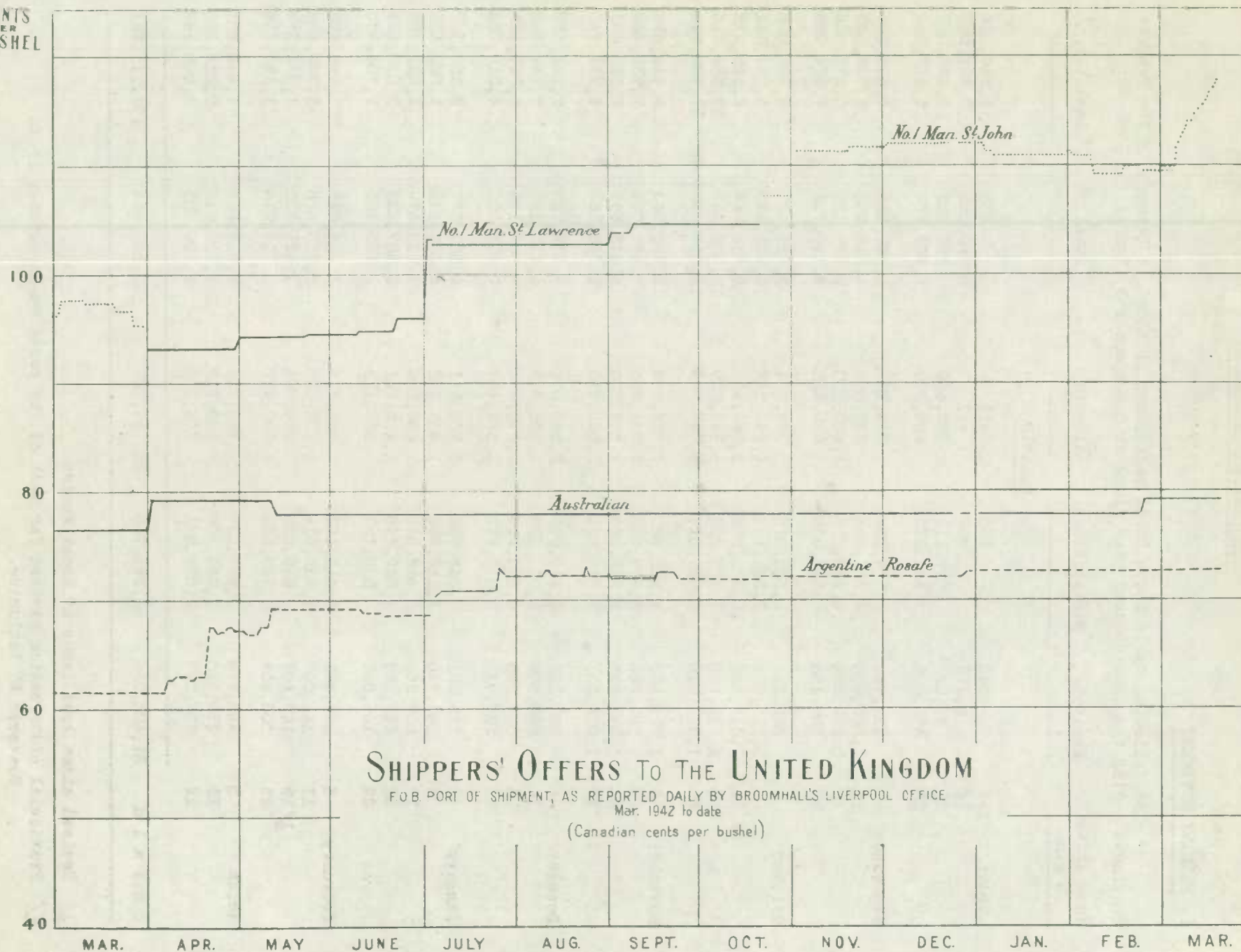
The following table shows the general index numbers of wholesale prices in Canada and Great Britain and of No. 1 Northern Wheat (Winnipeg Cash Price, basis in store Fort William and Port Arthur).

	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
1941	103.9	152.6	79.3
1942	110.5	159.6	88.6
February, 1942	109.2	158.5	82.8
March	109.7	158.8	82.8
April	109.7	159.6	83.9
May	109.9	160.7	84.2
June	110.6	159.8	84.9
July	111.0	160.2	85.8
August	110.3	159.0	94.4
September	110.6	159.1	95.1
October	111.5	160.1	95.5
November	112.0	161.0	96.1
December	112.0	161.5	96.0
January, 1943	112.1	162.1	96.0
February	112.6	2/	96.1

1/ Prepared by the Internal Trade Branch.

2/ Not yet available.

CENTS
PER
BUSHEL



SHIPPERS' OFFERS TO THE UNITED KINGDOM

FOB PORT OF SHIPMENT, AS REPORTED DAILY BY BROOMHAL'S LIVERPOOL OFFICE

Mar. 1942 to date

(Canadian cents per bushel)

THE CANADIAN SITUATION

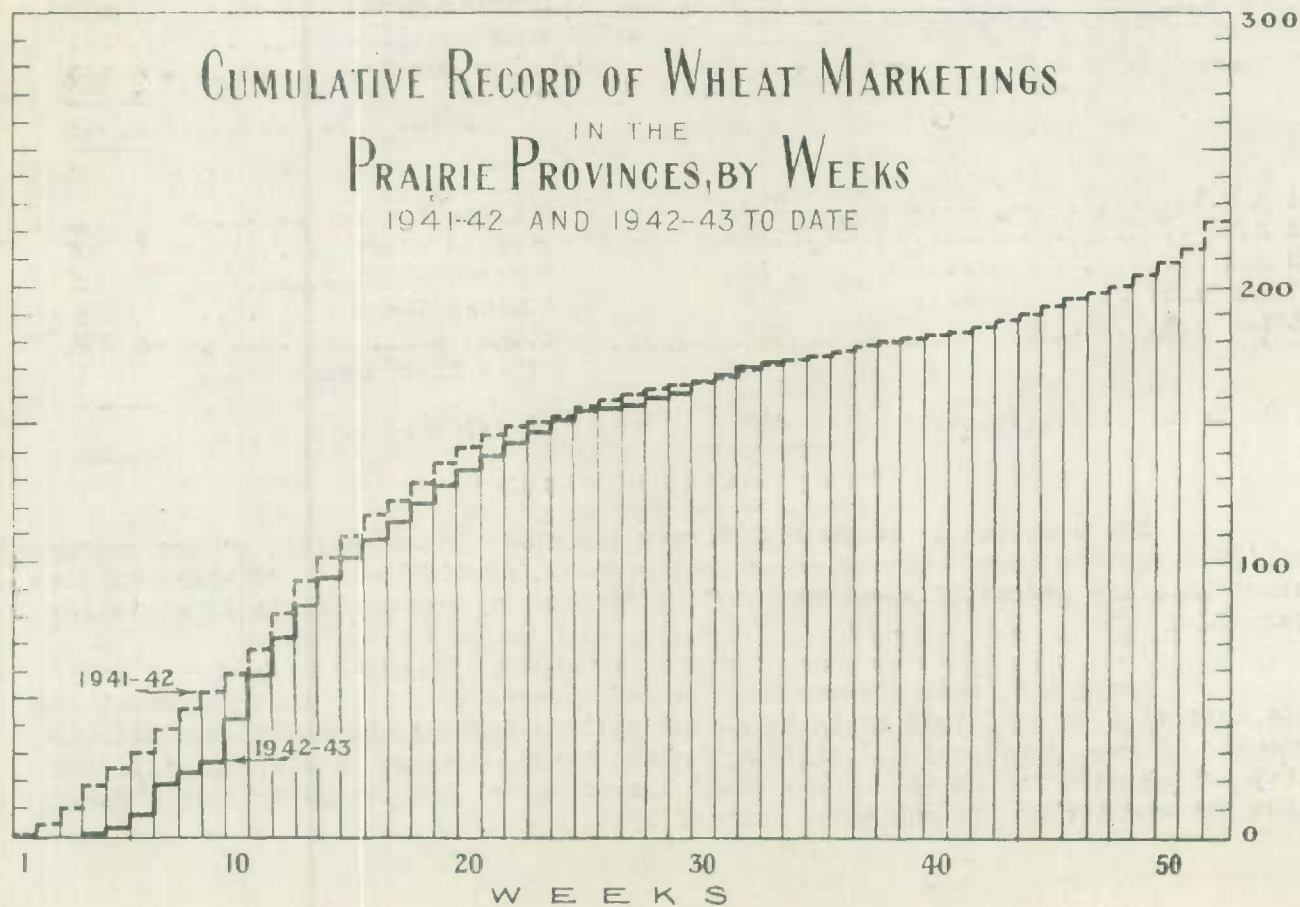
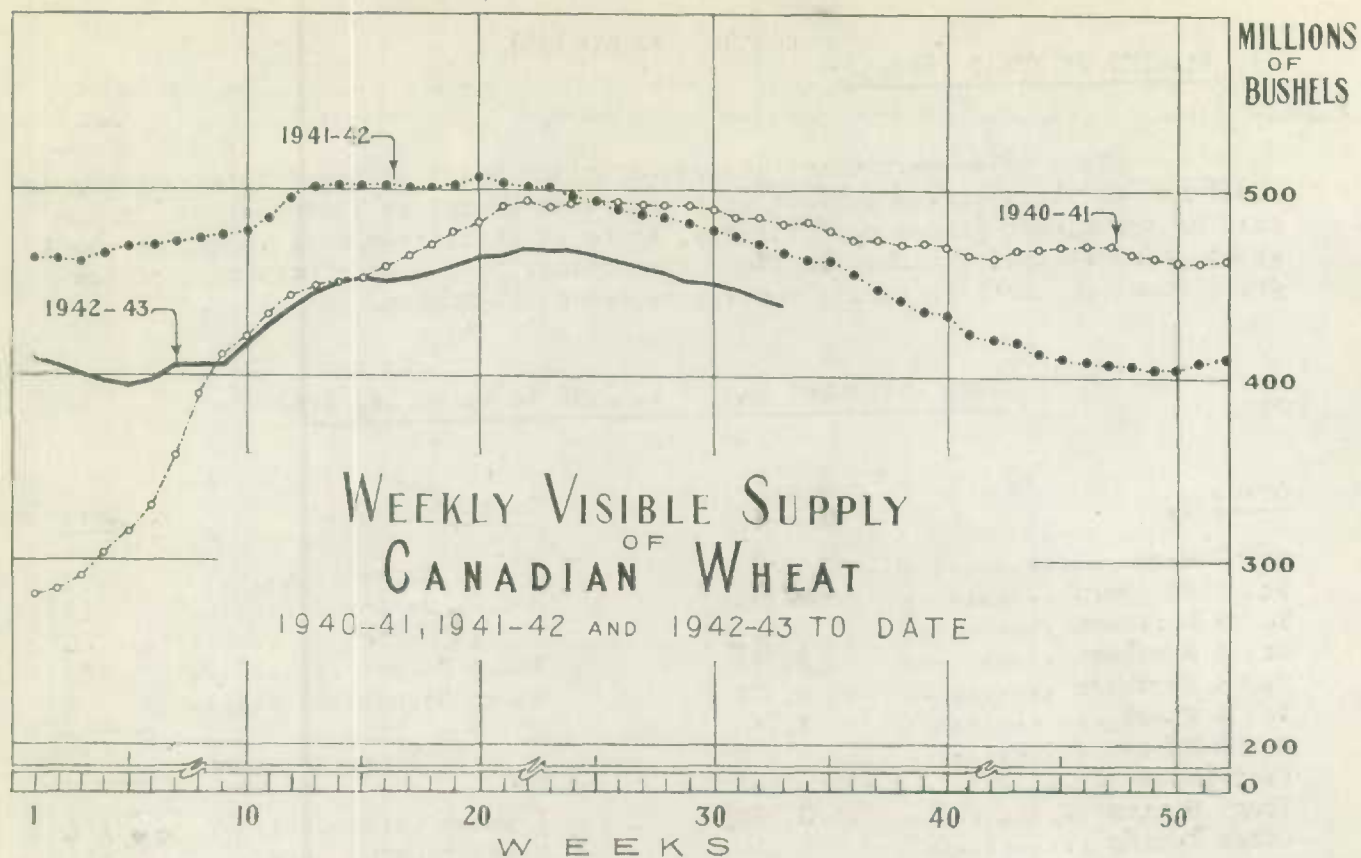
I. PRIMARY MOVEMENT

The following table shows total marketings of wheat by farmers in the Prairie Provinces during the 1942-43 crop year along with comparative figures for 1941-42:

Week ending 8 a.m.	Manitoba	Saskatchewan	Alberta	Total	Last Year ^{1/}
			<u>bushels</u>		
August 1-7	345	140	nil	485	1,344,134
14	8,677	1,906	nil	10,583	3,277,095
21	37,951	29,112	285,460	352,523	6,162,803
28	478,909	441,273	689,590	1,609,772	8,277,963
September 4	333,967	576,080	748,947	1,658,994	6,432,589
11	1,500,458	2,561,064	785,846	4,847,368	5,746,163
18	2,329,382	6,935,017	1,420,730	10,685,129	8,175,682
25	780,180	2,549,235	870,308	4,199,723	7,574,992
October 2	569,812	1,888,075	972,064	3,429,951	5,925,827
9	2,110,722	9,331,126	4,169,342	15,611,190	6,784,641
^{2/} 16	1,315,698	10,402,579	5,266,987	16,985,264	8,946,678
23	1,216,986	7,117,422	4,669,239	13,003,647	13,382,245
30	1,581,015	6,559,517	3,727,726	11,868,258	11,702,224
November 6	1,319,028	5,938,880	3,262,855	10,520,763	8,411,568
13	582,682	3,909,532	2,986,885	7,479,099	7,938,490
20	1,071,293	2,818,046	2,584,330	6,473,669	7,562,437
27	1,024,331	2,899,851	1,822,440	5,746,622	4,711,942
December 4	853,153	3,416,263	2,249,336	6,518,752	7,126,557
11	848,689	3,031,012	2,235,495	6,115,196	7,194,245
18	557,789	4,085,314	2,395,093	7,038,196	5,769,173
25	365,948	3,812,771	1,522,467	5,701,186	4,218,084
January 1	323,001	2,248,785	1,755,241	4,327,027	3,330,307
8	184,740	1,950,886	1,433,345	3,568,971	1,800,651
15	229,756	2,492,010	1,888,904	4,610,670	2,217,738
22	242,029	2,037,598	1,128,201	3,407,828	3,010,429
29	106,089	390,723	269,111	765,923	2,704,453
February 5	174,383	1,017,123	754,219	1,945,725	1,924,463
12	161,007	1,442,614	1,152,007	2,755,628	1,787,684
^{1/} 19	168,607	668,250	584,853	1,421,710	1,543,179
26	308,839	1,768,605	1,036,770	3,114,214	1,193,716
March 5	229,674	1,592,227	946,736	2,768,637	1,648,661
12	238,685	1,052,908	828,217	2,119,810	2,255,285
19	227,269	1,259,821	703,393	2,190,483	2,029,165
T o t a l s	21,481,094	96,225,765	55,146,137	172,852,996	172,111,263

^{1/} Revised since last issue of Wheat Review.

^{2/} Provincial distribution revised for each of the seven weeks October 16 to November 27 inclusive.



II. GRADING OF WHEAT 1942-43

Cars of western wheat inspected by the Board of Grain Commissioners in the first 32 weeks of the current crop year were graded as shown below. In the case of the higher grades particularly, there is an undetermined amount of wheat grown prior to 1942 included in these inspections, but most of the cars of low-grade wheat of northern spring variety represent 1942 crop.

Cars Inspected August 1, 1942 to March 14, 1943

<u>Grade</u>	<u>Cars</u>	<u>Grade</u>	<u>Cars</u>
No. 1 Hard	-	1 C.W. Garnet	3
No. 1 Northern	8,291	2 C.W. Garnet	18
No. 2 Northern	15,819	3 C.W. Garnet	23
No. 3 Northern	9,745	Tough Garnet	26
No. 4 Northern	2,411	Other Garnet	2
No. 5 Wheat	4,540		
No. 6 Wheat	773	Total	72
Feed Wheat	184		
Tough Spring	3,394	1 Amber Durum	6
Other Spring	1,310	2 Amber Durum	531
		3 Amber Durum	509
Total	46,467	Tough	301
		Other Durum	195
		Total	1,542
1 A.R.W.	225	3 White Spring	2
2 A.W.	115	1 Mixed Wheat	8
3 A.W.	32	3 Mixed Wheat	3
Tough A.W.	2	5 Mixed Wheat	6
Other A.W.	29	Tough	6
		Other Mixed Wheat	4
Total	403	Total	29

The contents of these 48,513 cars inspected to mid-March, at the average of 1,712 bushels (net) per car, represent some 83,000,000 bushels of wheat or just about half the amount of wheat marketed by farmers in western Canada in a similar period.

Among the lower grades, No. 5 wheat appears to be the most plentiful and the inspected cars of this grade total 7.7 million bushels, but only some 314,000 bushels of Feed wheat and 1.3 million bushels of No. 6 wheat have appeared in the inspections recorded above. Durum wheat inspected in this period is little more than one-quarter of the estimated crop of 1942.

III. VISIBLE SUPPLY

The following table shows stocks of Canadian wheat in store and in transit in Canada and the United States on March 18, 1943, along with comparative figures for approximately the same date in 1942 and 1941:

	<u>1943</u>	<u>1942</u>	<u>1941</u>
	(000 bushels)		
Country Elevators - Manitoba	29,865	28,845	31,325
Saskatchewan	117,685	102,515	134,120
Alberta	76,495	71,870	78,985
T o t a l s	224,045	203,230	244,430
Interior Private and Mill Elevators	5,306	6,159	7,915
Interior Public and Semi-Public Terminals ...	16,415	17,639	18,267
Pacific Ports	19,611	20,305	20,579
Churchill	2,617	2,617	2,617
Fort William and Port Arthur	99,673	131,582	90,632
Eastern Elevators - Lake Ports	29,696	25,828	16,486
St. Lawrence and Seaboard Ports	23,928	23,524	19,198
United States Ports	6,021	14,041	41,126
Storage Afloat	2,723	2,654	5,877
In Transit - Rail	5,980	16,996	13,014
In Transit - U. S. A.	3,586	2,561	3,416
T o t a l s	439,601	467,136	483,557

IV. MOVEMENT OF WHEAT TO MARITIME PORTS

The following figures represent the movement of wheat by RAIL from ports on the Great Lakes and the St. Lawrence River during the current season, with comparative figures for last year.

	<u>August 1, 1942 to March 18, 1943</u>	<u>August 1, 1941 to March 19, 1942</u>
	bushels	
Collingwood	2,300,430	966,788
Depot Harbour	-	727,956
Midland	8,016,928	15,497,857
Owen Sound	2,830,123	3,289,135
Port McNicoll	8,162,811	10,516,964
Goderich	2,249,486	3,667,549
Sarnia	2,480,275	1,241,337
Port Colborne	-	462,060
Humberstone	128,326	-
Prescott	236,837	919,171
Montreal	787,106	2,896,464
Sorel	-	79,313
Quebec	99,800	251,956
T o t a l s	27,292,122	40,516,550

V. RAIL MOVEMENT FROM FORT WILLIAM-PORT ARTHUR

Rail shipments of wheat from the lakehead elevators continue at double the rate of a year ago. Movement during the first seven months of the current crop year totalled 11.7 million bushels compared with 5.6 million bushels in the corresponding period last crop year. The monthly shipments are tabulated below:

	<u>1942-43</u>	<u>1941-42</u>
	<u>bushels</u>	
August	390,264	90,122
September	600,921	143,816
October	644,926	209,376
November	1,251,952	472,134
December	3,870,297	1,488,427
January	1,757,163	1,781,993
February	3,196,259	1,436,455
Total 7 months	11,711,782	5,622,383

These shipments were destined for a large number of points in the five eastern provinces and included some wheat going to the United States. Not all of this movement was related to the Freight Assistance Policy as fairly substantial amounts of western wheat were billed to flour milling centres, but the extent to which the freight subsidy affected shipments will be noted on the opposite page.

The February shipments by grades and provincial destinations, compiled from data furnished by the Statistics Branch of the Board of Grain Commissioners were as follows:

Rail Shipments from Fort William-Port Arthur

February 1943

	Ontario	Quebec	New Brunswick	Nova Scotia	Prince Edward Island	U.S.A.
	<u>bushels</u>					
2 Northern	673,967	64,000	-	-	1,500	-
3 Northern	620,032	139,191	1,500	-	-	-
4 Northern	418,303	70,667	667	-	3,000	-
No. 5	297,772	487,167	13,500	10,500	1,926	-
No. 6	87,779	84,301	-	1,500	-	-
Feed	20,079	21,000	-	-	-	-
Tough 3 Northern	3,888	10,500	-	-	-	-
Tough 4 Northern	-	5,544	-	-	-	-
Rej. 2 Nor. Mxd. Htd. ...	-	1,500	-	-	-	-
Rej. 3 Nor. Mxd. Htd. ...	-	1,475	-	-	-	-
Tough 3 C.W. Garnet	1,500	1,500	-	-	-	-
2 C.W. Amber Durum	15,000	1,552	-	167	-	82,246
3 C.W. Amber Durum	48,000	-	-	-	-	-
5 C.W. Amber Durum	-	1,573	-	-	-	-
Tough 4 C.W. Amber Durum	-	1,513	-	-	-	-
1 A.R.W.	1,939	-	-	-	-	-
Total	2,188,259	891,483	15,667	12,167	6,426	82,246
GRAND TOTAL ...	3,196,248					

VI. FREIGHT ASSISTANCE POLICY

The latest preliminary figures on freight assistance paid on western wheat shipped to British Columbia and the five eastern provinces for the feeding of live stock show that in the period from the inception of the plan in the fall of 1941 up to the end of February 1943, payments had been made on more than 21 million bushels of western Canadian wheat.

Shipments during the current crop year have been on a liberal scale and in the five months October 1, 1942 to February 28, 1943, a total of nearly eight million bushels figured in the claims on which payment had been made. The movement and the provinces to which the wheat was consigned is set out below for three different periods.

	<u>Inception to</u> <u>Sept. 30, 1942</u>	<u>Oct. 1 to</u> <u>Dec. 31, 1942</u>	<u>Jan. 1 to</u> <u>Feb. 28, 1943</u>	<u>Total</u>
	bushels			
Ontario	7,338,561	1,924,578	1,236,556	10,499,695
Quebec	3,418,400	1,926,476	853,826	6,198,702
New Brunswick	391,001	181,780	122,713	705,494
Prince Edward Island.	158,791	86,170	55,040	300,001
Nova Scotia	400,672	261,181	171,131	832,984
British Columbia	1,656,848	563,103	388,711	2,608,662
T o t a l s	13,364,273	4,943,288	2,827,977	21,145,538

Most of these shipments were made by rail although in the case of the eastern provinces some of the grain was moved by lake during the season of navigation and was withdrawn from eastern elevators.

VII. ONTARIO WHEAT

Deliveries of Ontario winter wheat are reported to be a little more liberal with some districts indicating the best movement from farms since last fall. Prices are firm, ranging from \$1.07 to \$1.10 per bushel at the barn, and at the mill door from \$1.08 to as high as \$1.13. This places the carlot price, basis Montreal freights, around ceiling levels.

The quantity of Ontario winters milled during the seven months ending February exceeded 3,000,000 bushels compared with 2.6 millions in the corresponding period last season. The millings, August-February, during the past three seasons are shown below:

	<u>August 1 to February 28</u>		
	<u>1940-41</u>	<u>1941-42</u>	<u>1942-43</u>
Bushels milled	3,364,992	2,648,179	3,169,695

In addition to the millings for flour, certain quantities were custom ground or ground for feed. The feed grindings in Ontario during the six months August-January 1942-43, totalled 145,738 bushels.

CROP-REPORTING PROGRAM, 1943-44

The dates of issue and subject matter of crop reports to be released by the Agricultural Branch of the Dominion Bureau of Statistics during 1943-44 are listed below. Deletion of the condition report at May 31 and extension of the telegraphic reports for the Prairie Provinces to the end of September are the principal changes from last year. This will enable the Bureau to give a more complete picture of harvesting operations toward the close of the season.

No.	Date	Day	Time	Subject
	1943		E.D.S.	
1	May 10	Monday	3 p.m.	Intentions to Plant Field Crops. Winter-Killing and Spring Condition of Fall Wheat, Fall Rye, and Hay and Clover Meadows. Progress of Spring Seeding.
2	May 25	Tuesday	3 p.m.	Telegraphic Crop Report, Prairie Provinces.
3	June 1	Tuesday	3 p.m.	Telegraphic Crop Report, Canada.
4	June 8	Tuesday	3 p.m.	Telegraphic Crop Report, Prairie Provinces.
5	June 15	Tuesday	3 p.m.	Telegraphic Crop Report, Canada.
6	June 22	Tuesday	3 p.m.	Telegraphic Crop Report, Prairie Provinces.
7	June 29	Tuesday	3 p.m.	Telegraphic Crop Report, Canada.
8	July 7	Wednesday	3 p.m.	Telegraphic Crop Report, Prairie Provinces.
9	July 8	Thursday	3 p.m.	Condition of Field Crops at June 30. Preliminary Estimate of Areas of Late-Sown Crops.
10	July 13	Tuesday	3 p.m.	Telegraphic Crop Report, Canada.
11	July 20	Tuesday	3 p.m.	Telegraphic Crop Report, Prairie Provinces.
12	July 23	Friday	3 p.m.	Estimate of Areas Sown to Principal Grain Crops in Prairie Provinces.
13	July 27	Tuesday	3 p.m.	Telegraphic Crop Report, Canada.
14	Aug. 3	Tuesday	3 p.m.	Telegraphic Crop Report, Prairie Provinces.
15	Aug. 9	Monday	3 p.m.	First Estimate of Production of Fall Wheat, Fall Rye and Alfalfa. Condition of Field Crops at July 31.
16	Aug. 10	Tuesday	3 p.m.	Telegraphic Crop Report, Canada.
17	Aug. 13	Friday	3 p.m.	Stocks of Grain at July 31.
18	Aug. 17	Tuesday	3 p.m.	Telegraphic Crop Report, Prairie Provinces.
19	Aug. 24	Tuesday	3 p.m.	Telegraphic Crop Report, Canada.
20	Aug. 31	Tuesday	3 p.m.	Telegraphic Crop Report, Prairie Provinces.
21	Sept. 8	Wednesday	3 p.m.	Telegraphic Crop Report, Canada.
22	Sept. 10	Friday	3 p.m.	First Estimate of Production of Principal Grain Crops and Hay and Clover. Condition of Late-Sown Crops.
23	Sept. 14	Tuesday	3 p.m.	Telegraphic Crop Report, Prairie Provinces.
24	Sept. 28	Tuesday	3 p.m.	Telegraphic Crop Report, Prairie Provinces.
25	Oct. 8	Friday	3 p.m.	First Estimate of Production of Root, Fodder and Late-Sown Crops.
26	Nov. 12	Friday	3 p.m.	Second Estimate of Production of Grain, Root and Fodder Crops. Area and Condition of Fall Wheat and Fall Rye. Progress of Fall Ploughing.
27	Dec. 10	Friday	3 p.m.	First Estimate of Value of Field Crops.
	1944			
28	Jan. 21	Friday	3 p.m.	Third Estimate of Production and Value of Field Crops.
29	April 14	Friday	3 p.m.	Stocks of Grain at March 31.

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