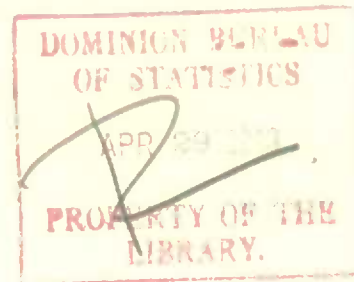


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DOMINION BUREAU OF STATISTICS
AGRICULTURAL BRANCH

Vol. 13

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MONTHLY REVIEW OF THE WHEAT SITUATION

APRIL 29, 1943

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AGRICULTURAL BRANCH

(Issued April 1943)

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THE WORLD WHEAT SITUATION - SUMMARY

The curtain has risen on another year of vital food production and the seed drills are busy once again in the wheat fields of five continents. Spring weather developed slowly in Canada and the United States with consequent delay in field operations, but came earlier than usual to Europe where much work has already been done on the land. In Australia and Argentina where it is now the autumn season the new wheat crops are being planted for harvest at the end of 1943, or about six months later than the European and North American harvests.

In those areas where winter wheat is grown extensively, and this applies chiefly to Europe and the United States, the crops seeded last fall are sufficiently advanced for preliminary appraisal of their condition and prospective outturn. Current advices would seem to indicate that the position compared with 1942 is somewhat reversed this year and that Europe has the better prospects. The critical period still lies ahead, however, and weather conditions over the next three months will be the determining factor in the ultimate result.

A mild winter in Europe was followed by an early spring, and the crops of winter wheat appear to have suffered a minimum of winter damage. It is doubtful, however, if a full acreage was sown last fall, and this means continuance of favourable conditions not only for winter wheat but for the spring sown crops, if the acute shortages of bread grain are to be remedied this year. The peoples of Europe over the past two years have had the "staff of life" rationed out to them in ever diminishing amounts.

The position in North America is safeguarded to some extent by the existing stock piles of old wheat, but the rate of disappearance in the United States, in the light of present prospects for the new winter wheat crop, is such as to suggest a very considerable reduction in the carry-over a year or so from now. Present indications are for a carry-over of 650 million bushels of old wheat in the United States on July 1, 1943, but projections made into 1944, based on estimates of production this year and probable use of wheat for feed, alcohol and other domestic uses in 1943-44, point to a carry-over on July 1, 1944, of between 250 and 300 million bushels.

In Canada, present indications are that the carry-over on July 31, 1943, will not differ greatly from that of the United States, so that the two North American countries will have between them something in the neighborhood of 1 1/4 billion bushels of wheat on hand before the 1943 crops are added. It must be noted, however, that domestic disappearance of wheat in Canada is also greater than usual, and the surplus will be further reduced by purchases for United States consumption. The first of these sales to the United States has been made, and further business appears to hinge largely on the availability of transportation equipment. The initial purchase totals 7,250,000 bushels.

In recent years most of the Canadian wheat finding its way into the United States has been for milling in bond or furtherance to some other country. Only limited amounts have paid duty for human or animal feeding purposes. There was a time only a few years back, however, when very substantial importations of Canadian wheat were made, largely for human consumption in the United States. These occurred in years of poor crop production in the United States.

The duty rate on foreign wheat imported for human consumption in the United States is 42 cents per bushel, and for animal consumption it is 5 per cent ad valorem. The records show that in the crop year 1934-35 almost 15 million bushels of Canadian wheat paid duty, and in the two following years the importations were considerably larger. In 1935-36 more than 38 million bushels were imported, two-thirds of it for human consumption, while in the crop year 1936-37 more than 30 million bushels were bought of which some 27 million bushels paid the full duty of 42 cents per bushel. In those years the duty on wheat for animal feeding purposes was 10 per cent ad valorem.

Seeding Progress

Very little seeding of the new spring wheat crop has been done in western Canada to date. The late spring and the fact that much wheat that lay out all winter still had to be threshed, combined to hold up field work. It is now reported that threshing operations of the balance of the 1942 crop are proceeding rapidly, and the wheat is grading very satisfactorily in spite of having spent the winter in the fields under snow. April rainfall in the Prairie Provinces has been far below normal but the rains of last fall created excellent sub-soil moisture and conditions for germination of the seed are believed to be good.

Wheat acreage reduction will be further encouraged in Canada this year and a bonus of \$2 per acre will be paid for every acre that was in wheat in 1940 and has been turned to the production of other crops or summerfallowed in 1943. If the acreage objectives for the more essential crops are met, it will mean a reduction of between three and four million acres from the 1942 level of wheat acreage. Farmers' intentions will be made known in a report to be issued on May 10.

Seeding of spring wheat is progressing rapidly in the United States following a period of delay caused by flood conditions in the northwest States. Although farmers indicated only a small increase in acreage, when questioned on March 1, there is every likelihood that they will increase their spring wheat plantings in view of the change that has taken place in the United States wheat statistical position and the relaxation of restrictions on marketings recently announced by the Government.

There is nothing in the news from Argentina or Australia to indicate changes in wheat acreage for the 1943-44 harvest, although trade reports have contained a hint that some reduction will take place. The seeding period in both countries extends into June and even July in some regions, so that the acreage planted will not be known for some time yet.

European seeding has made good progress under excellent weather conditions and the latest advices on fall sown wheat are the most favourable since the war began, with the outlook in Germany itself reported to be quite promising. The neutral countries of Turkey and Spain both report much better wheat crop prospects than a year ago.

Wheat Situation in Canada

Developments in the Canadian wheat situation in the past month included the announcement that the Canadian Wheat Board had reached an agreement of sale covering 7,000,000 bushels of Canadian wheat with the Belgian Ministry of Economic Affairs. This fact was made known to the House of Commons on April 9 by the Minister of Trade and Commerce.

The first shipment of 50,000 tons is to be made within 10 days of demand by the Belgian authorities and the remaining 150,000 tons during a period of two to three months later. The request for shipment is expected to come as soon as part or the whole of Belgium is liberated from Nazi control. The price agreed upon is 90 cents per bushel, basis Fort William, and the buyers will pay carrying charges at the rate of 4/5ths of a cent per bushel per month from a date in December last when the agreement was entered into.

Another event of importance to the Canadian wheat situation was made known to the House of Commons on April 20 when the Hon. J.L. Ralston, speaking for the Minister of Trade and Commerce, intimated that United States authorities were in the market for a quantity of Canadian feed wheat, the amount of which he did not specify. It was intimated, however, that the first purchases had been made through the regular trade channels in the Winnipeg Grain Exchange. The amount of wheat likely to be involved depends a good deal on available transportation facilities and this phase is now being examined by Canadian officials of the Wheat Board and Transport Controller's office.

In the domestic field the marketing restrictions on wheat have been removed from amber durum varieties grown in western Canada in 1942. It is now possible for growers of this type of wheat to deliver all their durum wheat produced last year and this privilege will continue until July 31, 1943, after which durum wheat deliveries by farmers will be restricted by the quotas in the manner affecting all wheat grown in the Prairie Provinces. The whole question of durum wheat is dealt with on a subsequent page of this Review.

The visible supply of Canadian wheat has been going down steadily, but the survey of wheat stocks on farms made as of March 31, reveals that farmers' holdings are at record levels. The peak of visible stocks (which exclude farm stocks) was reached on the last day of December when the total was 469 million bushels, but in the first three and one half months of 1943 this figure was reduced by about 50 million bushels, and the visible at mid-April was about 30 millions below the total a year previous.

End of March stocks of Canadian wheat in all North American positions, including Canadian farm stocks, totalled 798 million bushels compared with 566 millions on March 31, 1942. All but about eight million bushels of this total wheat supply was located in Canada this year, and approximately 46 per cent of stocks held in Canada were located on farms. Complete details of the stocks and their location are contained in another section of this Review.

The general delivery quota for wheat has now been raised by the Canadian Wheat Board to 10 bushels, but a considerable number of points in the Prairie Provinces are now enjoying a delivery quota of 14 bushels per authorized acre. This quota applies to all wheat of the 1942 crop with the exception of durum wheat, which is now in a special category for the balance of the crop year.

PRICES

The trend of wheat prices at Winnipeg was erratic with a downward tendency during the greater part of April. The May future on April 1 was quoted at \$1.02 3/4, its highest level of the season, but slipped back to show a closing price of \$0.98 1/2 on April 24. Meantime, the price of No. 1 Northern wheat moved up to register fractional premiums over the nearby future.

October futures went on the board for trading purposes on April 5 and finished that day at \$1.03 but subsequently displayed the same erratic trend as the other months to wind up at \$0.99 1/8 on April 24.

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

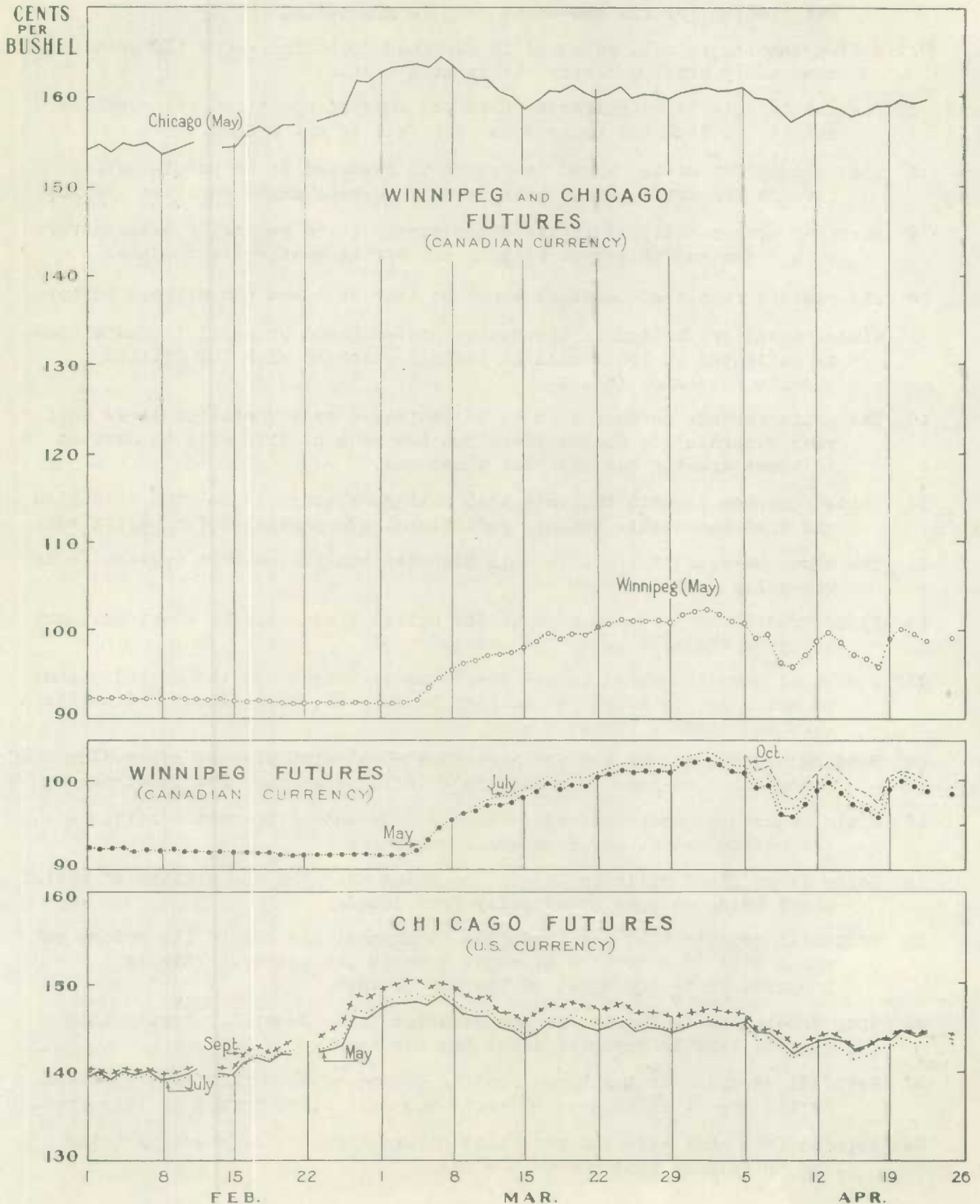
<u>Grade</u>	<u>March 25</u>	<u>April 1</u>	<u>April 8</u>	<u>April 15</u>	<u>April 22</u>
		(cents and eighths per bushel)			
No. 1 Northern	99/6	101/2	99/3	98	98/5
No. 2 Northern	96/3	97/6	96/1	94/4	95/1
No. 3 Northern	94/4	96/1	94/5	92/4	93/2
No. 4 Northern	93/3	94/3	92/3	90/2	90/2
No. 5 Wheat	90	91/3	89/7	87/6	87/5
No. 6 Wheat	89/4	90/7	89/3	87/2	87
Feed Wheat	88/4	89/7	88/3	86/2	86
Tough 1 Northern	98/1	99/4	97/7	96/2	96/7
Tough 2 Northern	94/5	95/6	93/6	91/5	92/2
Tough 3 Northern	92/4	94/1	92/5	90/4	91/2
No. 1 C.W. Garnet	96/3	97/5	95/6	94	94/2
No. 2 C.W. Garnet	95/3	96/5	94/6	93	93/2
No. 3 C.W. Garnet	93/7	95/1	93/2	91/4	91/6
No. 1 A. Red Winter ...	94/6	95/1	93/2	91/7	94/2
No. 2 Alberta Winter ..	94/6	95/1	93/2	91/7	94/2
No. 3 Alberta Winter ..	92/6	93/1	91/2	89/7	92/2
No. 1 C.W. Durum	118/3	118/6	109/6	108	107/2
No. 2 C.W. Durum	118/3	118/6	109/6	108	107/2
No. 3 C.W. Durum	116/3	116/6	107/6	106	104/2

Chicago Prices

Price movement at Chicago during the past month was also erratic but within a narrower range than the fluctuation at Winnipeg. The official announcement that the United States was in the Canadian market for wheat supplies and the failure of the Senate to override the President's veto of the Bankhead bill dampened bullish enthusiasm.

Constructive influences in the market were the rapid disappearance of wheat for feeding purposes and the less optimistic reports on the condition of the new winter wheat crop. Delayed seeding of spring wheat was also a steadying influence on prices.

DAILY CLOSING WHEAT FUTURES QUOTATIONS IN LEADING MARKETS



CALENDAR OF WHEAT EVENTS

1943

- March 29 Better than average yields of wheat in Turkey are promised by present crop conditions.
- 30 Recent rainfall has greatly improved moisture conditions in Argentina and plowing for the new wheat crop is proceeding.
- 31 Spring seeding is well advanced in European countries where the break-up came early after a comparatively mild winter.
- April 3 Finland is said to be suffering from the lack of wheat and rye supplies and the outlook for crops sown last fall is not promising.
- 5 The outlook for winter wheat in France is reported to be promising and farmers are active with spring work. Current wheat supplies are low.
- 6 European crop conditions on the whole appear to be generally satisfactory with a minimum of winter killing and spring weather favourable.
- 8 The visible supply of Canadian wheat on this date was 423 million bushels.
- 9 Winter wheat production in the United States based on April 1 conditions is estimated at 558.5 million bushels compared with 703 million bushels harvested in 1942.
- 10 The grain acreage in Russia is to be increased by 9.7 million acres this year according to Moscow plans but how much of this will be devoted to wheat growing has not been announced.
- 12 United Kingdom reports indicate that fall-sown wheat is in good condition and that favourable weather conditions have prevailed for spring work.
- 13 The wheat harvest in India is well advanced and the outturn appears to be generally satisfactory.
- 14 Flood conditions in some parts of the United States spring wheat belt are delaying the seeding of 1943 crops.
- 15 Stocks of Canadian wheat in all positions in Canada and the United States on March 31, totalled 798 million bushels of which almost 364 millions were on Canadian farms.
- 16 Seeding operations for the new Argentine wheat crop are now proceeding and Broomhall's advices from the trade indicate an increase in acreage.
- 17 Spain reports a promising wheat crop in 1943 and if present conditions are maintained it may mean smaller imports.
- 19 Three large flour mills in Greece are being used for the milling of relief wheat being shipped principally from Canada.
- 20 Broomhall reports that the Argentine Government has raised its prices on wheat sold to exporters by about 9 cents per bushel. This is presumed to be for wheat of the new harvest.
- 21 Crop conditions in Europe are now reported to be generally better than at this time in any year since the war began.
- 22 Rainfall records for the three Prairie Provinces show that precipitation during the first 19 days of April was much below normal in this area.
- 24 Reports from Australia indicate that a larger amount of wheat is being fed to animals than before the war.

UNITED STATES

The possibility of the wheat carry-over in the United States being down to 300 million bushels or less 14 months hence is suggested in the latest official review of the wheat situation prepared by the Bureau of Agricultural Economics of the United States Department of Agriculture. This compares with the carry-over of about 630 million bushels at the commencement of the current crop year, and the 10-year average (1932-41) of about 235 million bushels.

Heavy feeding of wheat to animals has resulted not only in the liquidation of substantial amounts of wheat held by the Commodity Credit Corporation, but may result also in the purchase of a considerable quantity of Canadian wheat by United States authorities. Transportation facilities are likely to determine the amount of Canadian wheat to be purchased, but it has been officially announced in the Canadian House of Commons that the first purchases have already been made.

This feed demand is cutting deeply into the enormous surplus of wheat held in the United States at the beginning of the crop year and it is estimated officially that the total quantity of wheat likely to be fed in the 12 months ending June 30, 1943, will be in the neighbourhood of 275 million bushels. Such a total has not previously been matched in the United States. In the crop year 1941-42 the amount of wheat fed to animals was 111 million bushels while in the preceding season it was only 112.5 million bushels.

Total disappearance of wheat in the crop year 1942-43 for food, feed and in other directions is now placed at 963 million bushels and it is forecast that disappearance in 1943-44 may be as much as 1,150 or even 1,200 million bushels. Such utilization in the new crop year, in the light of present prospects for 1943 wheat production in the United States, would result in the substantial reduction in carry-over already indicated for July 1, 1944.

Winter Wheat Crop

The winter wheat crop, based on reports received April 1, is estimated at 558.5 million bushels compared with 703 millions produced in 1942, while average yields on the intended spring wheat acreage reported on March 1, suggest a total wheat crop of 800 million bushels in 1943, or approximately 181 millions less than was produced last year. It should be noted, however, that spring wheat farmers announced their acreage intentions at a time when the prospects for wheat disappearance were less bright than they now appear, and an upward revision of the March 1 intentions figures seems very probable.

Unfavourable winter temperatures and poor surface moisture in some areas has led to deterioration of winter wheat prospects. Abandonment of acreage is estimated at 10.4 per cent compared with 7.0 per cent in 1942. The indicated yield per seeded acre is 14.9 bushels while last year the crop yielded 18.3 bushels to the acre. The big wheat-producing State of Kansas has in prospect a winter wheat crop of 167 million bushels compared with 206.6 millions harvested in 1942 but the seeded acreage in Kansas last fall was some 600,000 acres less than in the previous year. The abandonment of acreage in Kansas although greater than a year ago is considerably below average. Hessian fly was a cause of heavy acreage loss in a large number of fields. In most cases the abandoned acreage has been sown to spring crops. The latest weekly weather report from Kansas indicates that top-soil moisture was being depleted by high winds but sub-soil moisture appears to be adequate at the moment.

Farm Stocks, April 1

Stocks of wheat on United States farms on April 1, amounted to 328 million bushels compared with 269 millions a year previous and the 10-year average (1932-41) of 138.5 million bushels. These farm reserves in the current season represent about one-third of the 1942 production and are one-fifth larger than the record figure of April 1, 1942. The farm stocks appear to be heaviest in Wisconsin, Minnesota and Iowa where feed reserves are apparently being built up, and in other areas of heavy 1942 production, but are small in the eastern corn belt States, Ohio, Indiana and Illinois.

Movement of wheat from farms was heavy in the first quarter of 1943 and disappearance between January 1 and April 1 amounted to 167 million bushels which is the largest on record for this three-month period. In the same three months of 1942 the disappearance totalled 104 million bushels.

In addition to this heavy disappearance of wheat on farms there has been a steady reduction of the quantities on which loans were made by the Commodity Credit Corporation. The record of loans on 1942 wheat up to the end of March 1943, showed a total of 406 million bushels on which loans were made but at the same time almost 85 million bushels of this total were liquidated either by redemption or delivery to the C.C.C.

The National loan rate in 1942-43 was \$1.14 at the farm, being 85 per cent of the parity price of \$1.34 in June 1942. On March 15, 1943, however, the parity price of wheat was \$1.42 because of the rise in the index of goods which farmers buy. It appears certain, therefore, that the loan rate in 1943-44 will be higher than it is at present and a loan price is assured by the Government's decision to eliminate the referendum in 1943. Previously, the law had demanded that when total supplies were in excess of normal consumption, exports, and carry-over, a loan on wheat was dependent upon a favourable vote in a referendum on marketing quotas.

Bankhead Bill

President Roosevelt vetoed the Bankhead-Steagall bill which he described as inflationary and the Senate failed to override the veto. This bill would have excluded benefit payments made to United States farmers in the farm price formula, and would have raised very considerably the parity price of wheat. Another bill known as the Pace bill was opposed by Secretary of Agriculture Claude R. Wickard.

The Pace bill aimed at including an allowance for all farm labour in determining the parity price of farm products and Mr. Wickard told the Senate committee that this would immediately raise the parity index 23 points and increase the present farm parity by over 14 per cent. He condemned the bill as inflationary and pointed to the increases that its enactment would bring about in the retail cost of food.

Mr. Wickard estimated that the Pace bill would increase the farm income in 1944 by about 1,500 million dollars, even if farm sales for the next year were no greater than in 1942. That increase, he said, in the name of covering increased farm labour costs, would equal the entire amount paid to hired labour in the United States in 1942. He said there was danger in changing the definition of parity to include farm labour at a time when this action will so greatly raise the parity index. Such an action, he maintained, would change parity into a rubber yardstick, stretched to cover the highest farm wage level in the history of the country, and further stretched to include the labour of farm operators and unpaid family workers.

ARGENTINE LETTER

The correspondent of the Dominion Bureau of Statistics in Buenos Aires has forwarded the following report, under date of April 2, 1943.

Crop Conditions

With the general rains which fell during the month of March, says the crop report which has just been issued by the Ministry of Agriculture, an end has been put to a prolonged period of drought which affected considerably the whole cereal producing zone of the country. The result of the recent rains has been frankly beneficial for the natural grass pastures, and at the same time has facilitated the work of preparing the land and planting the seed for winter forage crops.

Supplies and Markets

March exports of wheat were 3,946,000 bushels of the grain and 398,000 bushels of flour in terms of grain, a combined total of 4,345,000 bushels, which compares with a combined total of 5,545,000 bushels in the preceding month, and leaves the statistical position as shown below:

Second official estimate 1942-43 crop	235,156,000 bushels	
Carry-over from 1941-42 crop	<u>159,875,000</u>	"
Total supplies	395,031,000	"
Deduct for seed and domestic consumption	<u>101,044,000</u>	"
Surplus available for export	293,987,000	"
Shipments) .. Wheat	13,754,000 bushels	
to March 31) .. Wheat as Flour ..	<u>549,000</u>	"
	14,303,000	"
Balance still available	<u>279,684,000</u>	"

The market remains quiet, only Brazil showing any active interest, and 2,462,000 bushels of the shipments during March were for Brazil. The United Kingdom is displaying no interest in Argentine wheat at present. Some of the exporters have been making enquiries for Candean wheat recently, but have found business difficult for lack of supplies.

During March some inferior wheat was disposed of for animal feeding, but following the general rains and the resultant improvement in pasturage this demand has fallen off.

AUSTRALIAN CABLE

The following cable from the Canadian Trade Commissioner in Melbourne, was received on April 19, 1943.

"Australia's wheat production in 1942-43 is estimated at 158,400,000 bushels. No change is reported in the official wheat quotations. Flour shipments to Ceylon, the United Kingdom and the Middle East are quoted at the same prices as contained in my February cable".

Reference to the February issue of the "Monthly Review of the Wheat Situation" shows that the price of flour to Ceylon was \$39.38 and to the United Kingdom and the Middle East on the basis of \$34.52 per short ton (2,000 pounds) f.o.b.

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	97.1
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/}

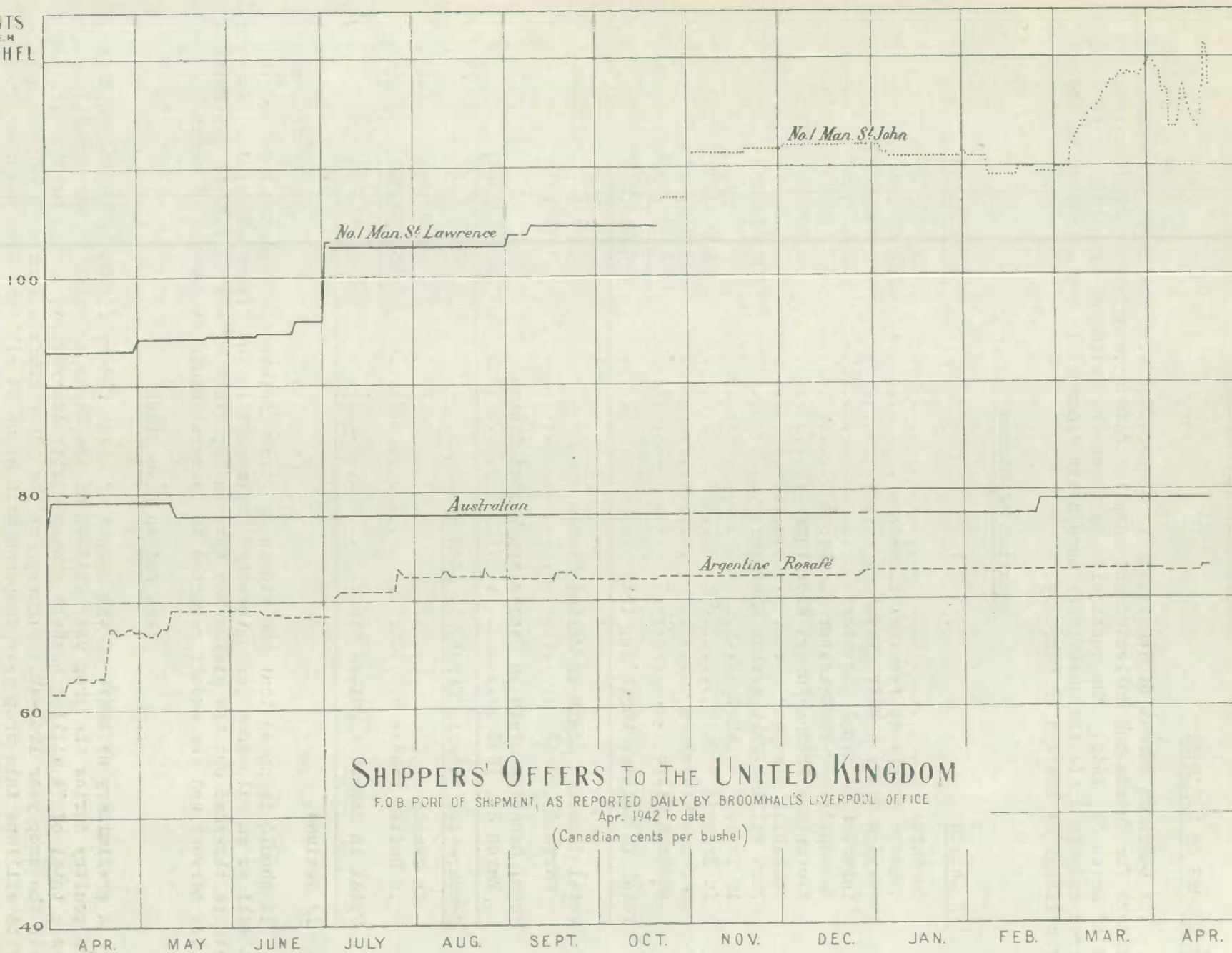
The following table shows the general index numbers of wholesale prices in Canada and Great Britain and of No. 1 Northern Wheat (Winnipeg Cash Price, basis in store Fort William and Port Arthur).

	General Index Canada 1930=100	Board of Trade ^{3/} United Kingdom 1930=100	Wheat No. 1 Manitoba Northern Fort William and Port Arthur basis 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
March, 1942	109.7	158.8	82.8
April	109.7	159.5	83.9
May	109.9	160.5	84.2
June	110.6	159.6	84.9
July	111.0	160.0	85.8
August	110.3	158.8	94.4
September	110.6	158.9	95.1
October	111.5	159.9	95.5
November	112.0	160.8	96.1
December	112.0	161.3	96.0
January, 1943	112.1	161.9	96.0
February	112.6	161.7	96.1
March	113.7	^{2/}	103.1

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

^{3/} Monthly figures revised April through January.

CENTS
PER
BUSHEL



SHIPPERS' OFFERS TO THE UNITED KINGDOM

F.O.B. PORT OF SHIPMENT, AS REPORTED DAILY BY BROOMHALL'S LIVERPOOL OFFICE

Apr. 1942 to date

(Canadian cents per bushel)

THE CANADIAN SITUATION

I. WHEAT STOCKS ON MARCH 31

The Dominion Bureau of Statistics in cooperation with the Board of Grain Commissioners for Canada has collected and compiled data showing stocks of Canadian wheat as of March 31, 1943. The quantities on farms are estimated from reports of Crop Correspondents while the quantities in eastern flour mills are estimated on the basis of holdings at the end of February.

Location of Stocks

<u>In Canada</u>	<u>Bushels</u>
On Farms	363,725,000
Country & Private Terminal Elevators	223,670,136
Western Mills & Mill Elevators	5,017,767
Interior Terminal Elevators	16,521,169
Vancouver-New Westminster Elevators	17,386,207
Victoria & Prince Rupert Elevators	2,216,014
Churchill Elevator	2,617,396
Fort William-Port Arthur Elevators	100,297,339
In Transit - Lakes	-
In Transit - Rail	6,359,259
Eastern Elevators	47,904,228
Eastern Mills	4,498,000
Total in Canada, March 31, 1943	790,212,515
<hr/>	
Total Canadian Grain in United States	
March 31, 1943	8,235,814
Total Canadian Grain in Canada and United States,	
March 31, 1943	798,448,329
<hr/>	
<u>Comparative Stocks, March 31, 1942 1/</u>	
In Canada	551,409,288
In United States	15,038,038
Total in Canada & United States	566,447,326

1/ Revised.

It should be noted that the stocks on farms include the seed for the 1943 crops as well as an allowance for unthreshed grain left in the fields all winter. When this grain is threshed out the yields may have an important effect on current estimates of the 1942 harvest and the stocks reported in farmers' hands at the end of March.

Wheat Fed to Live Stock

A preliminary estimate of the amount of wheat fed or likely to be fed to live stock and poultry during the crop year 1942-43 on the farms on which it was grown, indicates a total of 74 million bushels compared with the revised figure of 55.7 million bushels in the crop year 1941-42. Figures for the three Prairie Provinces suggest a total of 55 millions this crop year compared with about 44 millions last season. These figures are exclusive of wheat shipped from one province to another to be used as animal feed.

II. AMBER DURUM WHEAT

All durum wheat produced in western Canada in 1942 may now be marketed without restriction for the balance of the crop year 1942-43. This was announced in the House of Commons by the Minister of Trade and Commerce on March 29, and on the following day the Canadian Wheat Board issued a statement which read in part as follows:

"The Dominion Government has authorized the Canadian Wheat Board to remove restrictions on the marketing of durum wheat for the balance of the crop year. Durum wheat is used in the manufacture of macaroni and allied products which are in demand for civilian and military use. Macaroni in its use is a meat substitute and consequently an important food product under present conditions. The present removal of restrictions on the marketing of durum wheat is effective only until July 31, 1943. On and after August 1, 1943, restriction on wheat deliveries as announced for the crop year 1943-44 will apply to durum wheat as to other varieties."

The 1942 harvest of amber durum wheat was estimated at 9.7 million bushels of which 2.7 millions were credited to Manitoba and 7.0 million bushels to Saskatchewan, in the preliminary figures published last fall. These estimates have since been examined in the light of marketings and the reported acreage, and a downward revision has been in the Saskatchewan estimate not only for 1942 but for the previous year.

Preliminary Revisions

Examination of the acreage returns is continuing but the preliminary revisions now made show the following acreage and production during the past two years.

	<u>1 9 4 1</u>		<u>1 9 4 2</u>	
	<u>Acreage</u>	<u>Production</u> bu.	<u>Acreage</u>	<u>Production</u> bu.
Manitoba	135,992	2,700,000	105,000	2,700,000
Saskatchewan	105,000	882,000	154,000	4,111,800
Total	240,992	3,582,000	259,000	6,811,800

Marketing data collected and compiled by the Board of Grain Commissioners show that in 1941-42 the growers in Manitoba delivered 1.9 million bushels and the growers in Saskatchewan about 500,000 bushels of durum wheat. Figures for the current season up to April 15, continue to show deliveries from Manitoba farms running ahead of those in Saskatchewan despite the larger crop estimated for Saskatchewan. It may be necessary, therefore, to revise still further the Saskatchewan estimate when complete marketing data for the crop year become available.

The removal of marketing restrictions and the higher prices being paid for durum wheat relative to other spring wheats is expected to bring out the maximum amount of durum wheat available on farms this season and this should make possible a fairly complete revision of estimates later in the year.

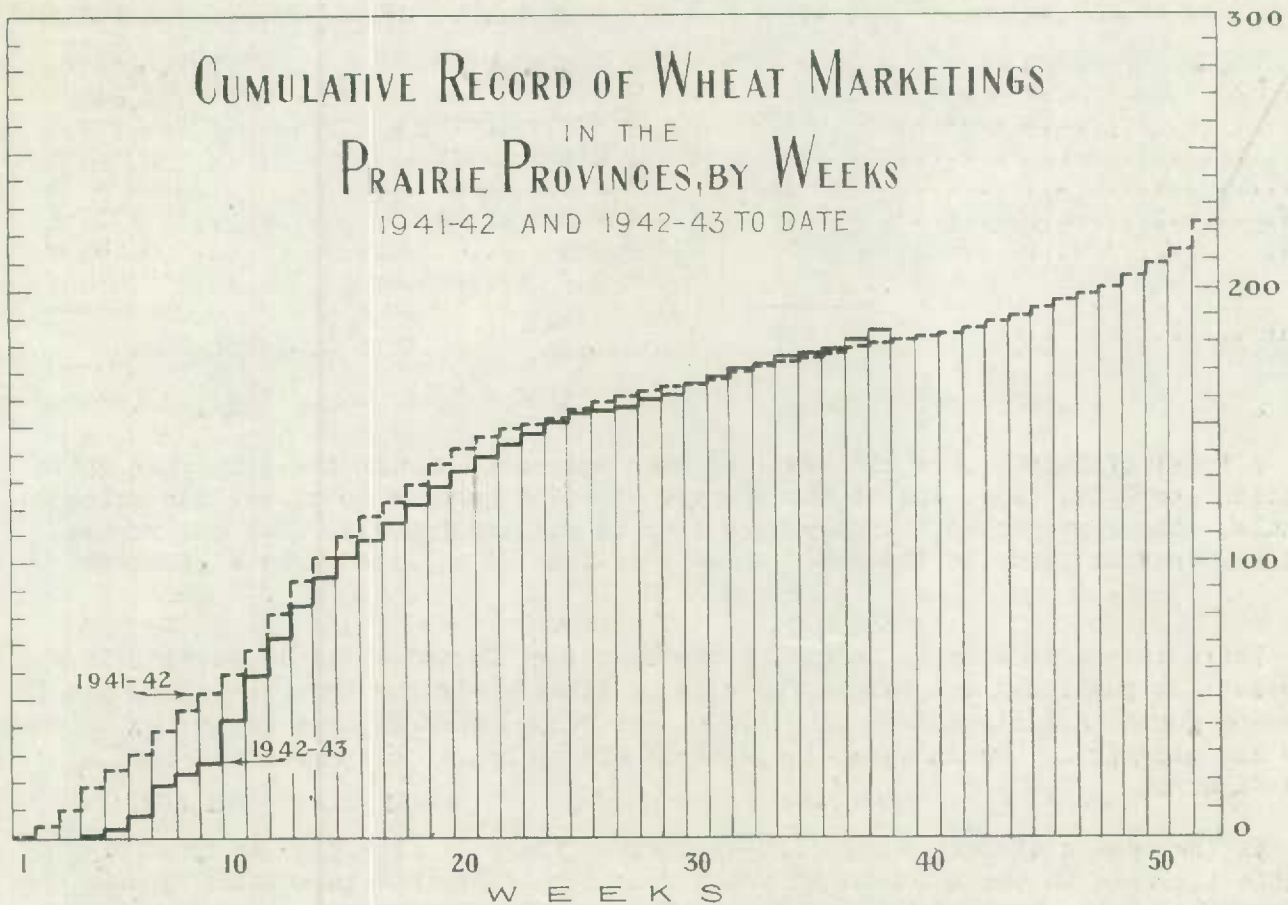
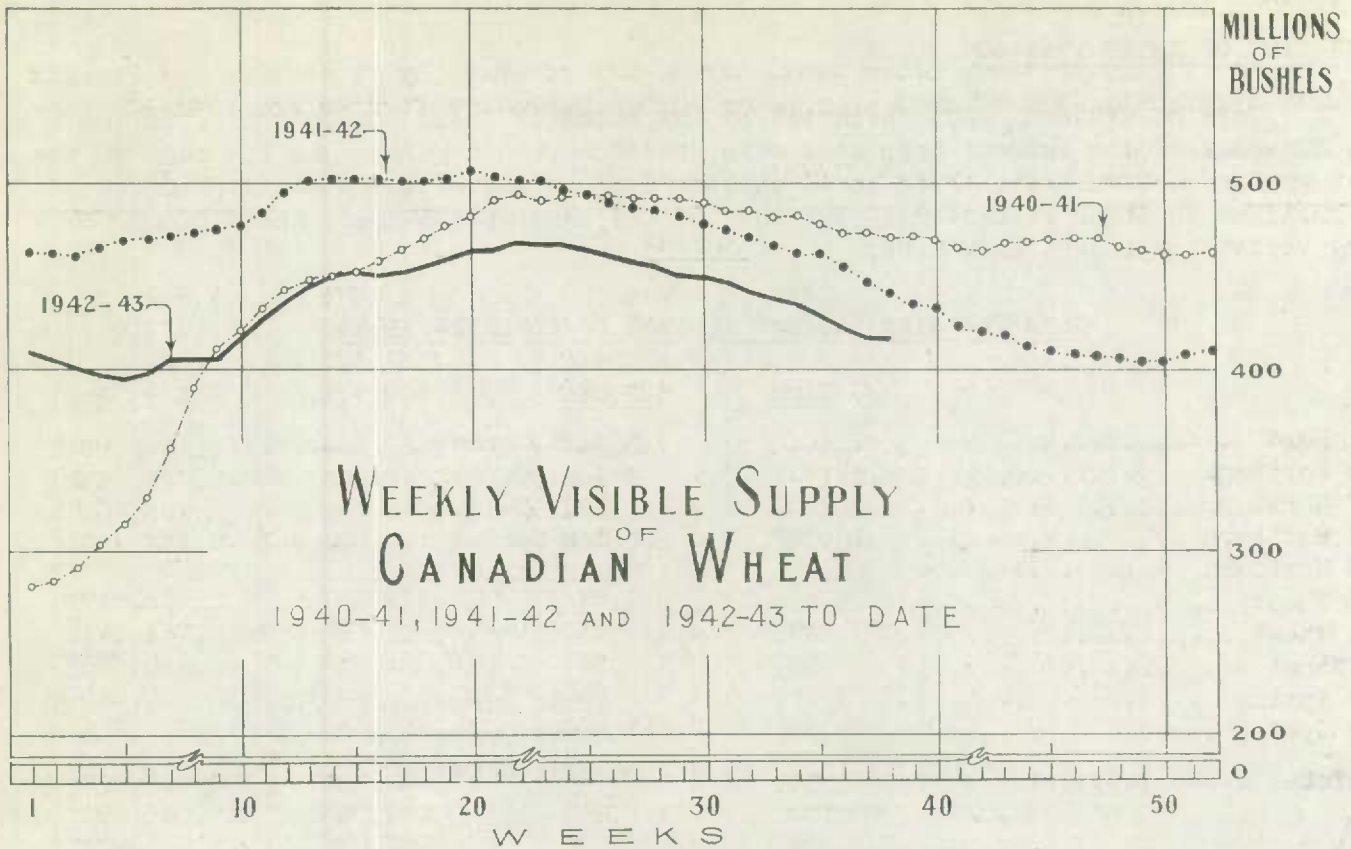
The price of durum wheat gained sharply on the northern spring grades during March and the average price of No. 1 amber durum was \$1.15 1/4 compared with an average of 97 1/8 cents per bushel for No. 1 Northern, both basis in store Fort William or Port Arthur.

III. 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
				bushels		
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
	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
	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
	<u>1/</u> 19	232,091	1,385,027	733,293	2,350,411	2,029,165
	26	185,380	1,088,077	693,503	1,966,960	1,719,252
April	2	199,717	1,253,180	600,253	2,053,150	1,383,182
	9	332,353	849,508	604,420	1,786,281	1,938,167
	16	355,760	1,605,509	571,376	2,532,645	1,635,903
	23	465,765	2,870,462	895,042	4,231,269	1,602,477
T o t a l s		23,024,891	104,017,707	58,540,631	185,583,229	180,390,244

1/ Revised since last issue of Wheat Review.



IV. GRADING OF WHEAT 1942-43

Cars of western wheat inspected by the Board of Grain Commissioners in the first 37 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 April 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	8,997	2 C.W. Garnet	19
No. 2 Northern	17,257	3 C.W. Garnet	24
No. 3 Northern	10,732	Tough Garnet	27
No. 4 Northern	2,901	Other Garnet	2
No. 5 Wheat	5,659	Total	75
No. 6 Wheat	895		
Feed Wheat	201	1 Amber Durum	6
Tough Spring	3,967	2 Amber Durum	567
Other Spring	1,700	3 Amber Durum	545
Total	52,309	Tough	326
		Other Durum	208
		Total	1,652
1 A.R.W.	232	3 White Spring	2
2 A.W.	118	1 Mixed Wheat	8
3 A.W.	33	3 Mixed Wheat	3
Tough A.W.	2	5 Mixed Wheat	6
Other A.W.	30	Tough	6
		Other Mixed Wheat	4
Total	415	Total	29

A total of 54,480 cars of wheat had been inspected during the crop year up to and including April 14, 1943, and at the average of 1,710 bushels (net) per car unloaded at terminals, this represented slightly more than 93 million bushels. The deliveries from western Canadian farms in the same period totalled 181 million bushels of wheat.

There is practically no change in the amount of Garnet wheat inspected since figures were last published and only a few cars of Alberta winters have shown up, but in the grades of northern springs more than 1,000 cars of No. 5 wheat were inspected between mid-March and mid-April. Durum wheat inspections are up by 110 cars from the last published figures.

As the season of lake navigation approaches there is likely to be a quite considerable increase in the movement of grain from country points in western Canada to the terminals at the head of the lakes and there is already evidence that this movement is under way.

V. VISIBLE SUPPLY

The following table shows stocks of Canadian wheat in store and in transit in Canada and the United States on April 22, 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	30,175	26,245	29,460
Saskatchewan	118,090	94,985	134,490
Alberta	76,350	66,860	78,660
T o t a l s	224,615	188,090	242,610
Interior Private and Mill Elevators	5,004	5,872	8,127
Interior Public and Semi-Public Terminals ...	16,374	17,361	17,886
Pacific Ports	19,434	20,251	20,302
Churchill	2,617	2,617	2,617
Fort William and Port Arthur	100,176	120,540	79,142
Eastern Elevators - Lake Ports	16,468	27,889	9,924
St. Lawrence and Seaboard Ports	15,639	19,490	22,608
United States Ports	5,485	10,386	32,237
In Transit - Lake	-	7,173	7,553
In Transit - Rail	8,016	18,821	27,348
In Transit - U. S. A.	3,814	3,381	1,548
T o t a l s	417,642	441,871	471,902

VI. 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</u> <u>April 22, 1943</u>	<u>August 1, 1941 to</u> <u>April 23, 1942</u>
		bushels
Collingwood	2,371,450	1,626,211
Depot Harbour	367,692	1,028,256
Midland	8,831,714	18,247,272
Owen Sound	3,039,113	5,305,744
Port McNicoll	9,718,810	11,658,711
Goderich	2,293,030	4,741,566
Sarnia	2,525,384	2,588,090
Port Colborne	-	1,129,803
Humberstone	128,326	218,805
Toronto	-	100,000
Prescott	1,020,612	1,624,668
Montreal	5,889,927	2,904,733
Sorel	1,003,070	95,313
Quebec	908,725	315,671
T o t a l s	38,097,853	51,584,843

VII. RAIL MOVEMENT FROM FORT WILLIAM-PORT ARTHUR

Shipments of wheat by rail from the lakehead terminals fell off in March compared with the quite heavy movement in February, but the total was greater than in March 1942 and the cumulative for the first eight months of the current season is about double what it was for the corresponding period in the crop year 1941-42. The monthly shipments are tabulated below:

	<u>1942-43</u>	<u>1941-42</u>
	bushels	
August	390,264	90,122
September	600,921	143,816
October	644,926	209,376
November	1,251,952	472,194
December	3,870,297	1,488,427
January	1,757,163	1,781,993
February	3,196,259	1,436,455
March	1,997,275	1,380,199
Total for 8 months ..	<u>13,709,057</u>	<u>7,002,582</u>

Preliminary figures covering payments made on wheat shipped from Fort William-Port Arthur to the five eastern provinces, under the Freight Assistance Policy, show that a total of 8.4 million bushels of wheat of western Canadian origin were distributed for use as feed for live stock and poultry in this 8-month period.

The total March shipments by rail from the head of the lakes by grades and province of destination are shown in the following table:

Rail Shipments from Fort William-Port Arthur

March 1943

	Ontario	Quebec	New Brunswick	Nova Scotia	Prince Edward Island
	bushels				
2 Northern	316,600	65,460	-	-	-
3 Northern	227,247	119,083	-	-	-
4 Northern	242,883	124,966	4,500	-	10,500
No. 5	211,592	463,912	11,500	-	1,500
No. 6	40,500	95,223	-	13,000	-
Feed	6,447	16,500	-	-	-
Tough 3 Northern	-	12,564	-	-	-
Rej. 3 Nor. Mxd. Htd.	-	1,594	-	-	-
Tough 3 C.W. Garnet	-	2,000	-	-	-
1 C.W. Amber Durum	2,267	-	-	-	-
2 C.W. Amber Durum	4,000	-	-	-	-
Tough Rej. 4 C.W. A. D. Sptd..	-	1,500	-	-	-
3 A. W.	1,937	-	-	-	-
TOTAL	1,053,473	902,802	16,000	13,000	12,000
GRAND TOTAL	1,997,275				

VIII. WHEAT MARKETINGS BY CROP DISTRICTS 1941-42

The deliveries of wheat by growers in western Canada to Country Elevators only during the crop year 1941-42 have been compiled by the Statistics Branch of the Board of Grain Commissioners and are set out below. It should be noted that certain quantities of wheat were delivered to other types of elevators or loaded over platforms and that the total farmers' marketings for the crop year amounted to 227.9 million bushels of wheat including Durum wheat.

Farmers' Marketings through Country Elevators

Crop District		- bushels -		
		Common Wheat	Durum Wheat	Total
<u>MANITOBA</u>				
Number	1	2,754,868	208,073	2,962,941
	2	6,145,315	356,852	6,502,167
	3	8,869,644	1,060,956	9,930,600
	4	1,266,883	164,315	1,431,198
	5	1,485,019	23,897	1,508,916
	6	187,319	4,164	191,483
	7	5,127,770	46,081	5,173,851
	8	3,298,701	29,832	3,328,533
	9	2,136,273	13,171	2,149,444
	10	4,025,870	1,980	4,027,850
	11	2,176,851	-	2,176,851
	12	340,122	755	340,877
	13	701,556	-	701,556
	14	296,635	-	296,635
		38,812,826	1,910,076	40,722,902
Sub. Div. Fort Frances				
Station Stratton, Ont.		337	-	337
T o t a l		38,813,163	1,910,076	40,723,239
<u>SASKATCHEWAN</u>				
Number	1A	5,519,919	252,577	5,772,496
	1B	5,257,611	49,895	5,307,506
	2A	6,288,627	20,564	6,309,191
	2B	13,847,693	82,265	13,929,958
	3AN	2,062,807	7,825	2,070,632
	3AS	8,579,352	19,525	8,598,877
	3EN	2,755,312	1,762	2,757,074
	3BS	4,301,615	52	4,301,667
	4A	3,300,558	73	3,300,631
	4B	5,831,800	-	5,831,800
	5A	6,769,516	8,377	6,777,893
	5B	7,360,684	5,205	7,365,889
	6A	4,747,026	35,288	4,782,314
	6B	4,311,885	32	4,311,917
	7A	11,237,238	508	11,237,746
	7B	2,961,369	-	2,961,369
	8A	5,012,666	-	5,012,666
	8B	5,840,035	-	5,840,035
	9A	5,320,450	-	5,320,450
	9B	2,971,520	-	2,971,520
T o t a l		114,277,683	483,948	114,761,631

Farmers' Marketings through Country Elevators

- bushels -

<u>Crop District</u>	<u>Common Wheat</u>	<u>Durum Wheat</u>	<u>Total</u>
<u>ALBERTA</u>			
Number 1	8,899,516	-	8,899,516
2	7,988,308	-	7,988,308
3	2,101,506	-	2,101,506
4	8,860,725	-	8,860,725
5	3,087,135	-	3,087,135
6	8,807,916	-	8,807,916
7	2,611,524	-	2,611,524
8	3,430,306	-	3,430,306
9	1,057,693	-	1,057,693
10	6,049,761	-	6,049,761
11	2,481,127	-	2,481,127
12	226,178	-	226,178
13	1,286,931	-	1,286,931
14	2,792,473	-	2,792,473
15	866,939	-	866,939
16	6,026,689	-	6,026,689
17	-	-	-
Total	66,574,727	-	66,574,727

BRITISH COLUMBIA

197,182	-	197,182
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TOTALS - PRAIRIE PROVINCES

Manitoba	38,813,163	1,910,076	40,723,239
Saskatchewan	114,277,683	483,948	114,761,631
Alberta	66,574,727	-	66,574,727
British Columbia	197,182	-	197,182
	219,862,755	2,394,024	222,256,779

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