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A large, stylized yellow wheat stalk is positioned vertically in the center of the page, serving as a background for the title text.

# MONTHLY REVIEW OF THE WHEAT SITUATION

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Editor:

S. A. Cudmore, M.A. (Oxon.), F.S.S., F.R.S.C.  
James McAnsh.

WORLD WHEAT SITUATION - SUMMARY

With a record wheat crop in the United States now fairly well assured, and production in Canada much greater than it was in 1943, the total supply of wheat in North America for the 1944-45 season would appear to be as great as it was during the crop year 1943-44. Substantial stocks of wheat are held also in Argentina and Australia, thus assuring ample stocks to take care of a considerable enlargement in international wheat movement during the next twelve months.

The latest official estimate places production of wheat in the United States this year at 1,132,000,000 bushels, a record for that country. The carry-over of old wheat amounted to 316,000,000 bushels and total supplies, exclusive of imports in both years, are only 10,000,000 bushels less for the coming season than they were in 1943-44.

Canada's wheat crop is now being harvested in the Prairie Provinces and while the first official estimate will not be made until September 12, several private estimates have been published indicating a crop of about 450,000,000 bushels. Such a crop, added to the carry-over of 355,000,000 bushels on August 1, would give the Dominion almost as much wheat as was available during the 1943-44 crop year.

Both Canada and the United States greatly reduced their reserve stocks of wheat during the past year but the 1944 harvests promise to offset the reduction in the United States almost wholly, and in Canada very largely. This means that Canada will be in a position to export very liberally and still continue a high rate of domestic utilization during the coming year.

It is significant that Canada disposed of about 533,000,000 bushels of wheat during the twelve months ended July 31, 1944. Exports accounted for about 344,000,000 bushels of this total, including the disappearance of about 160,000,000 bushels of Canadian wheat in the United States. This rate of exports could be maintained in the new season and still leave a carry-over of about 275,000,000 bushels at the end of next July.

The position in Argentina and Australia will be influenced to a large extent by war developments. Both countries have a good supply of surplus wheat, although Australia's new crop prospects are not very promising and her statistical position might be back to normal in 1945. Exports from Australia have been heavier in recent months and drought is a serious threat to the crop that will be harvested in November and December this year.

Argentina is still largely dependent on Brazil and Spain for the reduction of her wheat surplus and is holding heavy stocks. Her new crop prospects are fairly bright and her supply position is likely to remain a little top-heavy during the coming year. Less wheat is likely to be diverted to fuel use in the 1944-45 season and the fact that the Government is offering a bonus to farmers who store wheat on their farms is taken to indicate that the storage problem might become acute in the new season.

Any appraisal of the probable world demand for wheat in the 1944-45 season can be of little value at this time in view of the rapid and far-reaching changes in the war situation in Europe and in the Pacific zone, but even should it reach 700,000,000 bushels, which would be the largest in years, it would be comparatively simple for the four chief exporting countries to furnish this amount during the season.



## European Crops

The news concerning European crops this year continues generally favourable in character. The Continent, with some exceptions, appears to have a fairly good wheat crop in sight, while the United Kingdom again reports a good crop in the making, although acreage might be less than it was in 1943. The total wheat crop in Europe is judged by some authorities to be less than it was last year, and less than average, but in the absence of authentic information from Nazi-dominated areas it is difficult to assess the new crops.

Turkey appears to be the most favoured of the south-eastern countries, while Spain on the other side of the Continent is again harvesting a sub-normal crop, although it is believed to be better than anticipated earlier in the season. Portugal is also short in wheat supplies and will continue to import fairly liberal quantities.

Harvesting is fairly general all over Europe. Some areas of wheat production in France are at present a battle ground and losses of crop are undoubtedly being suffered, but the main wheat belt in France is still in Nazi hands. Part of the Italian crop fell to the United Nations but the bulk of Italy's crop is produced in the northern regions and the enemy will get a share of this crop.

Advices from North Africa suggest that there is no wheat surplus there this year. Ordinarily, Tunisia and Algeria ship out a fair amount of wheat, and earlier indications of crop production in 1944 suggested that a surplus might be available for shipment to Sicily and southern Italy this fall.

## Wheat Situation in Canada

The new winter wheat crop in Ontario is harvested and the combines are busy in the Prairie Provinces. Some flood damage has occurred in Manitoba and sawfly damage is quite extensive in parts of Saskatchewan and Alberta, while drought has taken heavy toll in some areas of the west. In spite of this, however, a substantial wheat crop is in the making in western Canada.

A considerable amount of new wheat has been cut in all three provinces but threshing operations have not been very extensive, due partly to showery weather. Some new wheat has been delivered to country elevators in all three provinces, but the volume is not large enough to give any real indication of the quality of the new crop. Some samples are light in weight, others well over 60 pounds to the bushel, but it will be a week or two yet before enough wheat has been threshed to permit of general appraisal of the crop.

Delivery quotas are again in operation in western Canada. These started at 5 bushels per "authorized" acre but this has been increased to 10 bushels at a number of points. The first increase from 5 to 10 bushels was announced by the Canadian Wheat Board on August 14, when 189 points in the three provinces were affected. Some additional points were added a few days later, and on August 22, the 10-bushel quota was extended to another 179 points in the west.

Total wheat deliveries during the crop year 1943-44 exceeded 325,000,000 bushels to the end of July this year, and at a number of points the deliveries on the 1943-44 permits were extended to August 15. It has not yet been announced whether a maximum will be set on wheat deliveries during the 1944-45 crop year. The maximum last year was placed at 280,000,000 bushels for the west, but later all restrictions were removed and all points placed on an open delivery basis.

Country elevator space is easier than it was a year ago at most points, and in the drought areas of southern Alberta there is probably more space than the new crops require, although there is some carry-over of old crop on farms in those areas.

# WHEAT BOARD PRICES FOR 1944-45

Effective as from August 1, 1944, the following prices are being paid by the Canadian Wheat Board for western Canadian wheat of the grades enumerated below. These prices are set for carlots, basis in store Fort William-Port Arthur or Vancouver. Prices to be paid for other grades of wheat will be announced in due course by the Board.

	Carlot Price per bushel
No. 1 Hard .....	\$ 1.25
No. 1 Northern .....	1.25
No. 2 Northern .....	1.22
No. 3 Northern .....	1.20
No. 4 Northern .....	1.15
Tough No. 1 Hard .....	1.22
Tough No. 1 Northern .....	1.22
Tough No. 2 Northern .....	1.19
Tough No. 3 Northern .....	1.17
Tough No. 4 Northern .....	1.12
No. 1 C.W. Amber Durum .....	1.25
No. 2 C.W. Amber Durum .....	1.22
No. 3 C.W. Amber Durum .....	1.20
No. 4 C.W. Amber Durum .....	1.15
Tough No. 1 C.W. Amber Durum .....	1.22
Tough No. 2 C.W. Amber Durum .....	1.19
Tough No. 3 C.W. Amber Durum .....	1.17
Tough No. 4 C.W. Amber Durum .....	1.12
No. 1 C.W. Garnet .....	1.20
No. 2 C.W. Garnet .....	1.18
No. 3 C.W. Garnet .....	1.16
Tough No. 1 C.W. Garnet .....	1.17
Tough No. 2 C.W. Garnet .....	1.15
Tough No. 3 C.W. Garnet .....	1.13
No. 1 Alberta Red Winter .....	1.35
No. 2 Alberta Winter .....	1.34
No. 3 Alberta Winter .....	1.31
Tough No. 1 Alberta Red Winter .....	1.32
Tough No. 2 Alberta Winter .....	1.31
Tough No. 3 Alberta Winter .....	1.28

The new season's prices show little change from those in effect at the close of the crop year 1943-44. Amber durum varieties are the exception and the prices for the three top grades of this wheat have been reduced by 5 and 6 cents per bushel. The new price for No. 1 C.W. Amber Durum is \$1.25, the same as that paid for No. 1 Northern. This is 5 cents per bushel less than the old price, while the reduction in the case of Nos. 2 and 3 C.W. Amber Durum is 6 cents per bushel, making the new prices \$1.22 and \$1.20 respectively.

Alberta Red winter wheat remains at the old levels of \$1.35 for No. 1 A.R.W. and \$1.34 and \$1.31 for Nos. 2 and 3 Alberta Winter respectively.



# CHICAGO WHEAT FUTURES

Wheat prices have moved within a narrow range in the Chicago futures market during the past month. The record wheat crop forecast for 1944 in the United States has been a bearish influence, but the downward trend has been restrained by the buying of the Commodity Credit Corporation, and the loan rate. The loan rate of wheat at Chicago is \$1.56 and during the first week of August the price of the September future declined about 3 cents below this level.

The war news from Europe has also been something of a bearish influence in the market while domestic business in flour in the United States has shown less activity. The crop prospects in Canada are also having their effect on the one important futures market now operating.

The following are the high points of closing in the wheat futures market at Chicago for the various contract months.

<u>1944</u>	<u>September</u>	<u>December</u>	<u>May</u>	<u>July</u>
(cents and eighths per bushel)				
July 25	155/6	156/6	157/5	
26	155/6	156/4	157/4	
27	156/1	156/6	157/5	
28	156	156/6	157/5	
29	155/6	156/4	157/2	
31	155/5	156/3	157/1	
August 1	155/6	156/2	156/6	
2	155/4	155/6	156	
3	155/5	155/6	156	
4	155/3	155/4	155/7	
5	155/1	155/1	155/3	
7	153/6	153/7	154	
8	154	154/2	154/2	148/6
9	153/7	154/1	154/2	150/2
10	153/6	154	154/3	150/5
11	153/5	153/7	154/2	150/6
12	153/3	153/5	154/1	150/7
14	153/3	153/4	154	150/6
15	153/7	154	154	151
16	154/6	154/7	154/6	151/2
17	155/2	155/3	155	151/2
18	154/6	154/7	154	149/7
19	154/4	154/4	153/6	149/5
21	154/5	154/6	154/3	149/5
22	154/4	154/2	153/5	148/6
23	154/4	154/1	153/1	147/7
24	155/2	154/1	152/6	146/7

CENTS  
PER  
BUSHEL

140

*No. 1 Man. St. John*

## SHIPPERS' OFFERS TO THE UNITED KINGDOM

FOB PORT OF SHIPMENT AS REPORTED DAILY BY BROOMHALLS' LIVERPOOL OFFICE

Aug. 1943 to date

(Canadian cents per bushel)

120

100

*New Crop*

*Australian*

*Argentine Rosafé*

80

60

AUG.

SEPT.

OCT.

NOV.

DEC.

JAN.

FEB.

MAR.

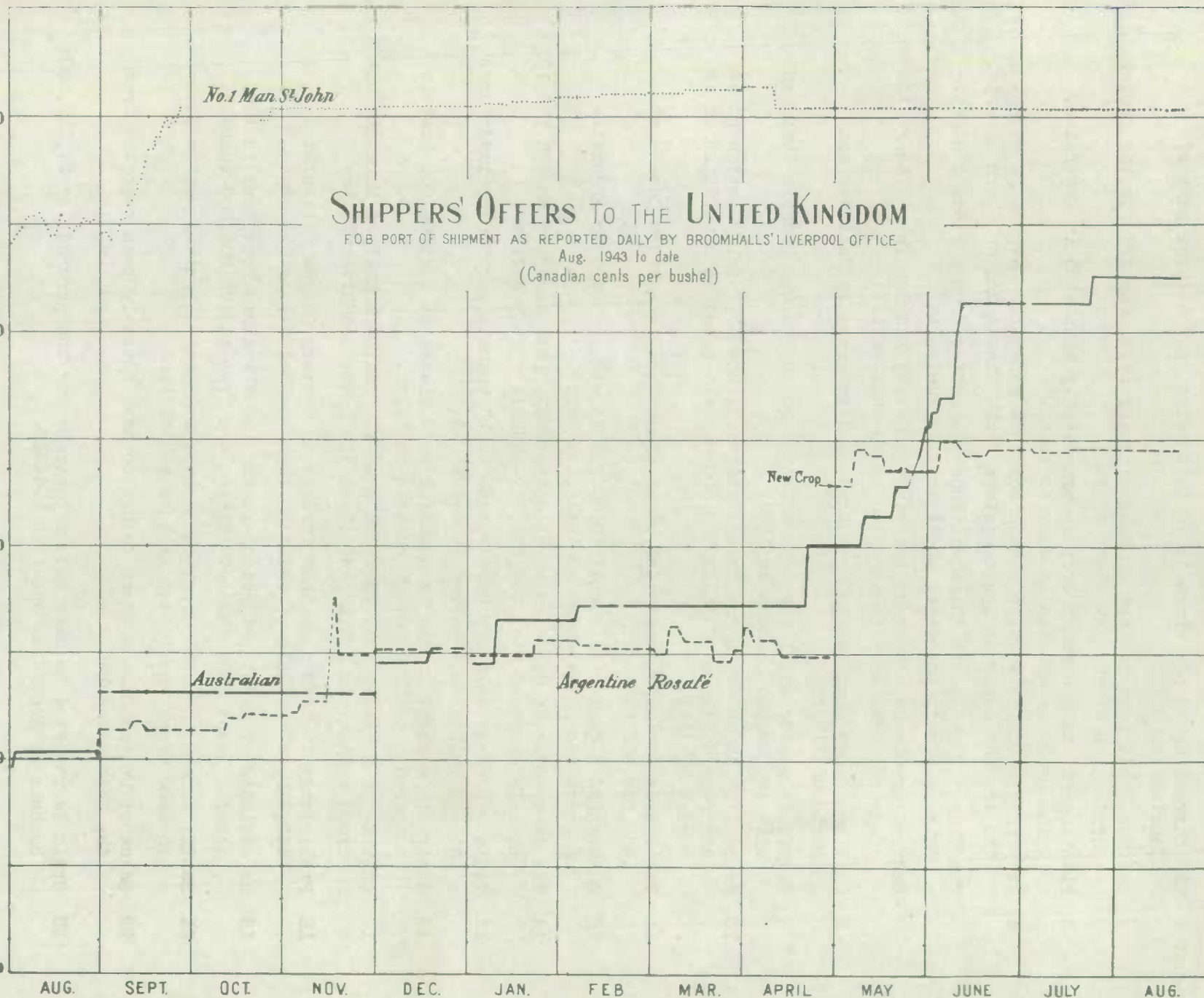
APRIL

MAY

JUNE

JULY

AUG.



CALENDAR OF WHEAT EVENTS

1944

- August 1 The harvesting of new wheat is in full swing over a large part of Continental Europe.
- 2 Weather conditions in part of Australia are still too dry for the proper germination of the new wheat crop.
- 3 Planting of the new wheat crop is practically completed in Argentina. Rains would be welcome in many sections.
- 4 Crop conditions in western Canada continue generally favourable except in the drought areas of south-western Saskatchewan and southern Alberta.
- 5 The State of New South Wales continues to suffer from serious drought. This is a very important wheat area in Australia.
- 7 Harvesting of the new wheat crop in the United Kingdom is making rapid progress. The crop is expected to be substantial.
- 8 Cutting of new grain crops is making good progress in Manitoba and parts of Alberta.
- 9 Ontario's winter wheat crop is estimated at 20,703,000 bushels compared with 13,222,000 bushels in 1943.
- 10 Production of wheat in the United States is now officially estimated at the record figure of 1,132,000,000 bushels based on conditions as at August 1, 1944.
- 11 The Searle Grain Co. estimates wheat production in western Canada at 447,000,000 bushels.
- 12 A bonus of 2 cents per bushel (U.S. funds) will be paid to Argentine farmers who store wheat on their own farms.
- 14 The carry-over of Canadian wheat on July 31, 1944 amounted to 355,176,183 bushels compared with 594,626,019 bushels a year earlier.
- 15 Quotas on wheat delivery were raised to 10 bushels per "authorized" acre at 189 points in the west on August 14.
- 16 Australia's wheat stocks on August 1 were placed at 144,000,000 bushels compared with 157,000,000 bushels on July 1.
- 17 Cutting of grain is well advanced over the southern half of Manitoba but flood conditions again prevail in the lower Red River Valley.
- 18 Preliminary figures show that farmers in western Canada delivered 325,000,000 bushels of wheat in the year ended July 31, 1944.
- 19 An estimate of wheat production in the three Prairie Provinces in the Alberta Wheat Pool "Budget" places the crop at 425,000,000 bushels.
- 21 Sawfly damage to wheat crops in Saskatchewan and Alberta is again severe in some areas and losses will be substantial.
- 22 Sales of United States wheat to Mexico have recently been reported from the Chicago market.
- 23 Spain is reported to have made a contract for the purchase of 37,000,000 bushels of Argentine wheat in 1944-45.



## UNITED STATES

Wheat production estimates in the United States have again been raised. The total wheat crop is now placed at 1,152,105,000 bushels compared with 836,298,000 bushels harvested in 1943. The production of winter wheat is estimated at 786,124,000 bushels, a slight reduction from the previous estimate, but the spring wheat crop of almost 346,000,000 bushels is about 39,000,000 bushels greater than the crop produced in 1943, and somewhat larger than the estimate made at the beginning of July.

With a carry-over of 316,000,000 bushels from previous crops, the new record-size crop will give the United States a total wheat supply of 1,448,000,000 bushels or only 10,000,000 bushels less than the record supply during the crop year 1942-43 exclusive of imports in both years. With disappearance estimates for the crop year 1944-45 somewhat lower than actual disappearance during the past crop year, the carry-over a year hence is not expected to be very materially changed from the 316,000,000 bushels on hand at July 1, 1944.

A record quantity of 1,290,000,000 bushels of wheat disappeared in the United States during the twelve months ended June 30, 1944. The amount used for animal feed, a substantial part of which was imported from Canada, fell just short of the quantity used for human food, but in the new crop year it is expected that a much smaller amount of wheat will be fed to animals, although this depends on the outcome of the new corn crop. The following is a rough picture of wheat utilization in the United States during the crop year 1943-44:

	<u>Bushels</u>
Human Food .....	545,000,000
Animal Feed .....	517,000,000
Alcohol Production .....	107,000,000
Seed for 1944 crop .....	79,000,000
Exports, etc. ....	42,000,000
T o t a l .....	<u>1,290,000,000</u>

It is expected that wheat used for human food, alcohol production and seed may show some increase in the present crop year, but animal feeding is likely to decline if the corn crop comes through as at present indicated. Exports are likely to exceed those of the 1943-44 crop year, especially if the war in Europe terminates during the next year. A somewhat larger allowance is being made for outward shipments from the United States during 1944-45.

Some further imports of Canadian wheat are anticipated during 1944-45 but the scale of purchases is likely to be reduced substantially from the total imported during 1943-44. No official estimate of the year's imports from Canada have been released, but trade and other estimates place these at close to 160,000,000 bushels in the twelve months ended July 31, 1944.

Storage facilities are rapidly filling up in the United States terminal markets and much grain had to be piled up in the open in Kansas and at other points. Heavy rains fell on this unprotected wheat, but it is not anticipated that losses will be important. Labour shortage was an important factor in the congestion at terminal points, but there appears to have been some improvement in recent weeks.

The spring wheat harvest is well under way and primary receipts are increasing. It is reported that yields of spring wheat are not as good as those in 1943, although the crop is substantially larger. The greater production is due wholly to the big increase in seeded acreage. Durum wheat production is estimated at approximately the same as in 1943, the new crop being placed at 36,690,000 bushels.

Rust did some damage to winter wheat but there is no evidence that it has materially affected the spring wheat crops, although some damage may show up in the late crops, particularly in the northern regions of the spring wheat belt.

## Wheat Disappearance in U.S.A.

A recently published official statement of wheat supplies and disappearance in the United States during the past fourteen years emphasises the marked increase in the use of wheat for animal feed during the past two years. The figures are as follows:

<u>Year beginning July 1</u>	<u>Human Food</u>	<u>Animal Feed</u>	<u>Total Disappearance</u>
		(million bushels)	
1930 .....	489.6	179.7	865.5
1931 .....	482.8	190.2	878.7
1932 .....	492.4	143.1	753.9
1933 .....	448.4	102.6	657.2
1934 .....	459.1	113.6	668.6
1935 .....	474.5	99.1	668.3
1936 .....	480.4	112.7	702.0
1937 .....	477.3	129.8	804.6
1938 .....	485.2	153.1	823.3
1939 .....	482.4	108.2	711.8
1940 .....	485.9	114.0	711.6
1941 .....	489.5	114.5	699.6
1942 .....	526.0	306.4	985.6
1943 .....	545.0	516.8	1,291.6

It will be noted that the human and animal populations in the United States consumed more than 1,000,000,000 bushels of wheat during the crop year 1943-44 or more than twice as much as was consumed in the crop year 1939-40. The use of wheat for animal feed alone was almost five times greater than it was during the crop year 1939-40.

Exports of wheat and flour have been very moderate during the past several years but the use of wheat for the production of industrial alcohol is a new development which has taken up an appreciable share of the wheat supplies.

## AUSTRALIAN CABLE

The following cable was received on August 17 from the Canadian Government Trade Commissioner at Melbourne:

"Australian wheat stocks on August 1 totalled 144,000,000 bushels. The rate of exports of wheat and wheat flour remains unchanged. Flour mills are working at a little over 90 per cent of their capacity. The consumption of mill offals and wheat for stock foods is steadily increasing due to drought conditions and to increased live-stock production.

"Figures are not yet available as to the acreage seeded to wheat for the 1944-45 crop but they will probably be a little under those of last season's acreage of 8,300,000 acres. An unofficial estimate of production from the new wheat crop in Australia indicates only 75,000,000 bushels compared with 107,500,000 bushels harvested last December-January.

"Good rains are very badly needed in the northern districts of Victoria and in New South Wales. Average rainfall has been received in other parts of Australia."

Other reports from Australia emphasize the seriousness of the drought in New South Wales which is the largest wheat producing State in the Commonwealth. The seed was planted in a very dry seed bed and rains have been very limited since then. It will be another three and one-half to four months, however, before the new harvest begins so that some recovery could probably take place under favourable weather conditions from now on.



## ARGENTINE LETTER

The correspondent of the Dominion Bureau of Statistics in Buenos Aires has forwarded the following report under date of August 5, 1944.

### Crop Conditions

The official report on conditions affecting the field crops during the month of July says that an almost total lack of rains during that time was unfavourable for the work of seeding and for the development of the fields already germinated, and adds that even though the eastern part of the province of Buenos Aires, the south of Santa Fe and the south of Entre Rios were more favoured by moisture, the quantity could not be considered normal for requirements.

The planting of wheat, which had already begun in some zones in June and continued without difficulties, except in some districts where the rains were insufficient to facilitate the work, suffered interruptions during July which became general almost throughout the country, in some districts being paralyzed by the drought. As mentioned above, parts of eastern Buenos Aires were an exception to this, and work continued without interruption in that zone. The condition of the germinated fields suffered a set-back, especially in the provinces of Santa Fe and Cordoba where, in addition to intense frosts and drought, there were heavy attacks of green fly.

### Supplies and Markets

Shipments of wheat during the month of July were 6,711,000 bushels, of which 5,841,000 bushels were grain and 870,000 bushels flour in terms of grain. This compares with a total of 6,498,000 bushels in the preceding month. The statistical situation is as follows:

Third official estimate 1943-44 crop .....	249,853,000 bushels	
Carry-over from previous crops .....	109,689,000	"
Total supplies .....	359,542,000	"
Less seed and domestic requirements 102,881,000 bushels		
relief of war victims .....	7,349,000	"
	110,230,000	"
Surplus available for export .....	249,312,000	"
Shipments to) Wheat .....	48,452,000 bushels	
July 31 ) Wheat as flour .....	8,086,000	"
	56,539,000	"
Balance still available .....	192,773,000	"

Of the above available balance 35,567,000 bushels have been contracted for shipment to Spain, and 4,777,000 bushels, approximately, have been sold to exporters. There is still a notable absence of demand for Argentine wheat from the United Kingdom, and export business during the month was principally with neutral countries and with Brazil.

There was an active local market for Spot wheat, with a sustained demand for all types, particularly of Superior and Special qualities. Frequent sales were effected at up to 8. pesos per 100 kilos, and in one case a parcel of Candéal variety sold for 9. pesos. The Agricultural Produce Board's prices remained unchanged from the levels of the previous month, with old crop grain on offer at 10.70 and new wheat at 12.50 pesos per 100 kilos, 62 1/2 pounds per bushel, in bulk.

No wheat is being sold for fuel, but the supply situation is such that it is not unlikely that some of the remaining old crop wheat will eventually be used as combustible. The shipping situation remains unchanged, with only limited tonnage available and freight rates very high.

By a recent Decree the Government has made it known that with the object of stimulating the construction of granaries on farms, it will pay growers premiums of 2.50 pesos per ton over and above basic crop prices for wheat and linseed stored on farms in constructions of a permanent nature. The payments will be made exclusively for the benefit of farmers.



Monthly Average Winnipeg Cash Price -- No. 1 Northern Wheat  
Crop Years 1936-37 to 1943-44

(cents per bushel)

	1936-37	1937-38	1938-39	1939-40	1940-41	1941-42	1942-43	1943-44
August .....	102.2	131.8	76.6	54.9	72.2	73.3	88.9	111.9
September ..	103.9	133.6	63.3	73.9	71.7	72.6	89.6	117.5
October .....	110.9	142.3	61.5	70.3	70.4	73.7	90.0	124.1
November ...	108.4	134.6	59.0	70.5	71.8	73.2	90.5	125.0
December ...	120.2	137.4	60.6	82.4	73.4	74.4	90.4	125.0
January .....	124.7	149.1	59.9	82.8	74.2	77.0	90.4	125.0
February ...	127.0	144.6	60.4	83.8	75.2	78.0	90.5	125.0
March .....	135.7	138.4	59.5	87.0	76.2	78.0	97.1	125.0
April .....	138.9	138.4	60.5	89.2	75.7	79.0	99.0	125.0
May .....	130.6	115.2	65.5	79.7	75.9	79.3	99.0	125.0
June .....	124.2	114.3	61.8	72.3	77.0	80.0	101.5	125.0
July .....	145.6	98.4	55.3	71.4	74.7	80.8	109.3	125.0

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
July 1943 .....	115.6	164.0	116.0
August .....	115.9	162.2	118.8
September .....	116.7	162.9	124.7
October .....	117.7	162.5	131.7
November .....	118.2	162.7	132.7
December .....	118.4	163.4	132.7
January 1944 .....	118.4	164.0	132.7
February .....	118.6	164.6	132.7
March .....	118.9	164.9	132.7
April .....	118.8	165.5	132.7
May .....	118.4	166.1	132.7
June .....	118.4	166.1	132.7
July .....	118.4	2/	132.7

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

# THE CANADIAN SITUATION

## 1. Carry-Over Stocks of Canadian Grain at July 31, 1944

Canada's wheat carry-over on July 31, 1944, amounted to 355,176,183 bushels compared with the record total of 594,626,000 bushels at the end of July, 1943. This represents a reduction of approximately 40 per cent and brings the carry-over of wheat down to its lowest level since 1940 when the total was just over 300,000,000 bushels. Sharp reductions have occurred also in the carry-over of oats, barley and rye compared with stocks held on July 31, 1943, but the flaxseed position shows little change.

Farm holdings of all grains are substantially lower with the exception of flaxseed. The greatest reduction is noted in wheat where farm stocks dropped to about 54,000,000 bushels compared with 190,000,000 bushels at the end of July, 1943. Feed grain stocks are notably lower but in the case of the Prairie Provinces, the farm stocks of oats and barley at the end of July this year are well above average. The farm position in each of the three Prairie Provinces is shown in the following table:

### Farm Stocks in Prairie Provinces

	<u>Wheat</u>	<u>Oats</u>	<u>Barley</u>	<u>Rye</u>	<u>Flaxseed</u>
	- bushels -				
Manitoba .....	3,000,000	8,330,000	4,300,000	33,000	71,000
Saskatchewan .....	26,200,000	32,100,000	9,600,000	576,000	577,000
Alberta .....	23,650,000	21,400,000	8,925,000	391,000	166,000
Prairie Provinces .....	52,850,000	61,830,000	22,825,000	1,000,000	814,000

### Position of Canadian Grain Stocks, July 31, 1944

	<u>Wheat</u>	<u>Oats</u>	<u>Barley</u>	<u>Rye</u>	<u>Flaxseed</u>
			- bushels -		
<u>IN CANADA</u>					
On Farms .....	53,871,000	69,423,000	23,379,000	1,044,000	824,000
Country & Pte. Term. Elevs..	136,196,211	13,631,487	7,483,237	568,364	281,302
Western Mills & Mill Elev. .	6,725,491	935,750	208,549	30,695	85,228
Interior Terminal Elevators.	10,894,527	8,276	371,588	63	661,548
Vancouver-New Westminster ..	14,867,949	173,141	22,623	1,776	-
Victoria and Prince Rupert .	1,352,196	-	-	-	-
Churchill .....	1,877,812	-	-	-	-
Fort William-Port Arthur ...	27,364,005	13,126,636	5,633,795	2,346,932	1,472,252
In Transit - Lakes .....	4,142,531	291,052	170,351	50,000	21,670
In Transit - Rail .....	27,763,987	7,171,999	2,734,012	80,962	285,615
Eastern Elevators .....	49,582,880	2,582,431	5,346,892	199,779	17,510
Eastern Mills .....	2,144,072	465,366	245,998	43,360	-
Total in Canada .....	336,782,661	107,809,138	45,596,045	4,365,931	3,649,125
Canadian Grain in U.S.A. ...	18,393,522	734,182	277,925	1,210,130	-
Total Canadian Grain in Canada and United States ...	355,176,183	108,543,320	45,873,970	5,576,061	3,649,125

### Carry-Over on July 31, 1943

In Canada .....	579,370,626 <sup>1/</sup>	146,871,148	65,922,701	14,399,369	3,740,121
In United States .....	15,255,393	2,469,367	3,355,801	868,386	-
	594,626,019	149,340,515	69,278,502	15,267,755	3,740,121

<sup>1/</sup> Revised.



## II. CANADIAN WHEAT CARRY-OVER 1921-44

Stocks of Canadian wheat in North American positions on July 31, 1944 were the smallest since 1940. A feature of the stock position at the close of the 1943-44 crop year was the sharp reduction in the quantity of wheat held on farms in western Canada. Details of the stock position are to be found on the preceding page.

### Carry-over of Canadian Wheat in Canada and the United States

	Carry-over of Wheat in Canada	Stocks of Canadian Wheat in U.S. Ports	Total Carry-over of Canadian Wheat in Canada and U.S.
	bu.	bu.	bu.
September 1, 1921 .....	13,888,694	240,786	14,129,480
1922 .....	20,591,000	1,558,092	22,149,092
1923 .....	11,690,296	483,324	12,173,620
August 1, 1924 .....	45,158,819	2,958,084	48,116,903
1925 .....	27,713,810	3,027,284	30,741,094
1926 .....	36,475,183	3,664,179	40,139,362
1927 .....	50,786,435	4,835,148	55,621,583
1928 .....	77,547,071	13,609,623	91,156,694
1929 .....	104,325,221	22,913,925	127,239,146
1930 .....	110,516,848	16,065,242	126,582,090
1931 .....	133,059,501	5,538,334	138,597,835
1932 .....	130,053,092	5,888,255	135,941,347
1933 .....	209,968,856	7,688,210	217,657,066
1934 .....	192,947,925	9,954,252	202,902,177
1935 .....	202,147,582	11,704,536	213,852,118
1936 .....	108,094,277	19,268,321	127,362,598
1937 .....	32,937,991	4,110,848	37,048,839
1938 .....	23,553,228	982,630	24,535,858
1939 .....	94,631,948	8,278,905	102,910,853
1940 .....	272,927,932	27,545,533	300,473,465
1941 .....	448,337,801	31,791,510	480,129,311
1942 .....	404,896,791	18,855,546	423,752,337
1943 <u>1</u> /...	579,370,626	15,255,393	594,626,019
1944 <u>2</u> /...	336,782,661	18,393,522	355,176,183

1/ Revised. 2/ Preliminary

It should be pointed out that the figures in the above table are not strictly comparable because of certain omissions in the earlier years. Figures for the years 1921 to 1923, for instance, do not include wheat afloat to Canadian lake or river ports, while from 1921 to 1931, wheat afloat for United States ports was not included. It should be noted further that from 1921 to 1931, the stocks of Canadian wheat in United States lake and seaboard ports are reported for the week-end nearest to the close of the crop year. Stocks of Canadian wheat held in bond by United States flour mills were omitted each year until 1940-41 when they were included for the first time, and have since been part of the carry-over. The carry-over totals now include all Canadian wheat in North American positions, whether on farms, in store or in transit.



### III. NEW RECORDS IN GRAIN HANDLING

The crop year 1943-44 witnessed many new records in Canada's grain trade. Wheat fed to live stock and poultry in Canada is expected to reach a total of approximately 100,000,000 bushels, the largest on record, while exports of Canadian wheat to the United States exceeded by a considerable margin anything recorded in the past. Total exports of Canadian wheat and flour will not equal the 409,000,000 bushels exported during the crop year 1928-29, but the total of approximately 340,000,000 bushels is the second best on record.

A banner year was experienced at Fort William and Port Arthur where Canada's largest terminal elevators are located. Receipts and shipments of grain, including wheat, oats, barley, rye and flaxseed, surpassed the previous records established in 1928-29, while shipments of grain across the lakes from Fort William and Port Arthur also reached a new high level. Twice during the crop year 1943-44, the total of grain shipped in a single day from the lakehead terminals, exceeded the previous record made in November 1928.

Some of the more important records in grain handling at Fort William and Port Arthur have been listed as follows by the Statistics Branch of the Board of Grain Commissioners:

	<u>Net Bushels</u>
Total Receipts of Grain 1943-44 .....	420,014,073
Previous Record 1928-29 .....	409,717,463
Total Shipments of Grain 1943-44 .....	450,060,202
Previous Record 1928-29 .....	374,441,852
Total Lake Shipments of Grain 1943-44 ..	405,762,185
Previous Record 1928-29 .....	371,222,154
Total Grain shipped in One Day 1943-44 .	
November 29, 1943 .....	6,581,627
April 17, 1944 .....	6,596,903
Previous Record November 29, 1928.	6,385,814

A few of the old records were undisturbed during the 1943-44 crop year. The largest number of cars of grain unloaded in one day remains the 2,748 1/2 cars unloaded on October 2, 1928. These cars had a total content of 3,794,208 bushels. A larger quantity of grain was unloaded on September 8, 1939 when 4,193,816 bushels were emptied from cars in a 24-hour period, but larger cars were then in use and it needed only 2,560 1/2 cars to carry this amount of grain.

Fort William and Port Arthur also hold the record for the largest amount of grain held in store at one point in Canada. This record was established in 1942 when the quantity of wheat alone in store at the twin ports was in excess of 133,000,000 bushels. The total storage capacity of the elevators at the two ports is more than 146,000,000 bushels and on April 1, 1942 there was little more than the minimum amount of working space available.

#### IV. EXPORTS OF CANADIAN WHEAT AND FLOUR

In the absence of final figures on United States imports of Canadian wheat during the crop year 1943-44 only preliminary data are available on the total exports of Canadian wheat and flour. The preliminary figures indicate, however, that a total of 344,000,000 bushels was exported which is about 129,000,000 bushels more than was exported during the crop year 1942-43.

Flour exports are expected to reach a wheat equivalent of 61,000,000 bushels to establish a new record. This will be equal to about 13,500,000 barrels of 196 pounds each and will surpass by a considerable margin the record for flour exports set up during the crop year 1942-43.

Wheat exports are tentatively placed at 283,000,000 bushels of which more than half represents disappearance of Canadian wheat in the United States. Wheat shipments overseas were smaller than during the crop year 1942-43, but the shipments to the United States raised the total wheat exports in the form of grain to figures far in excess of the shipments during 1942-43.

The following table sets out the complete month-by-month exports to all destinations during the first nine months of the crop year with comparative figures for the four preceding years.

	<u>1943-44</u>	<u>1942-43</u>	<u>1941-42</u>	<u>1940-41</u>	<u>1939-40</u>
	- bushels -				
August 1943 .....	27,716,863	15,546,739	20,391,405	11,560,065	13,198,877
September .....	22,215,055	9,827,484	15,556,038	9,622,992	14,688,827
October .....	23,846,816	14,169,255	14,314,814	10,810,971	9,220,393
November .....	23,188,842	15,637,315	17,752,672	13,705,174	18,826,047
December .....	25,419,684	8,389,775	20,259,936	8,953,630	15,480,129
January 1944 .....	30,193,480	13,878,802	18,166,222	15,220,986	20,148,824
February .....	33,525,148	15,650,208	15,610,033	18,110,049	16,556,686
March .....	27,905,975	23,128,154	20,046,761	21,497,072	21,268,085
April .....	41,315,967	23,278,531	29,696,162	30,757,859	16,831,280
May .....		26,180,186	23,705,259	36,815,411	22,366,323
June .....		27,190,819	17,054,252	31,084,121	12,042,247
July .....		21,823,634	13,274,880	23,067,916	12,046,650

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Crop Year Totals ...	214,700,902	225,828,434	231,206,246	192,674,368
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Total for 9 Months

August - April .....	255,327,830	139,506,263	171,794,043	140,238,798	146,219,148
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9 Months' Exports as  
% of Crop Year Total

64.98	76.07	60.65	75.89
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## V. CONDITION OF FIELD CROPS AT JULY 31, 1944

With the exception of wheat, the principal field crops of Canada at the end of July showed some deterioration from the outlook at June 30, 1944. Wheat condition figures for the three Prairie Provinces, based on weather factors, showed marked improvement in Manitoba and Alberta during July, but only slight improvement in Saskatchewan. Feed grains, expressed as a percentage of the long-time average yield per acre, declined in all three provinces from the condition indicated at the end of June.

Spring wheat in Ontario and Prince Edward Island held to the June 30 figure, while in Quebec some improvement took place during the month. Elsewhere there was a moderate recession in the condition of the crop on July 31. Oats and barley lost ground everywhere except in Quebec and Prince Edward Island, while flaxseed slipped badly in Saskatchewan and Alberta, though fairly well maintaining the end of June position in Manitoba and Ontario where the acreage is relatively small.

A substantial crop of winter wheat is estimated for Ontario. The first appraisal of the crop places the outturn at 20,708,000 bushels compared with 13,222,000 bushels harvested in 1943. The acreage remaining for harvest this year is 668,000 acres compared with 601,000 acres in 1943, while yield per acre is placed this year at 31 bushels versus 22 bushels per acre a year ago. During the five years 1936-40, average production of winter wheat in Ontario was 19,070,000 bushels, while in 1942, the year of bumper harvests all over Canada, production totalled 23,391,000 bushels.

Fall rye production in the four provinces growing this crop in 1944 is estimated at 7,276,000 bushels compared with 4,468,000 bushels harvested in 1943. Saskatchewan's share of this year's total is 3,953,000 bushels, while Alberta is next highest producer with 1,512,000 bushels. The Ontario crop is placed at 1,192,000 bushels and in Manitoba the outturn is expected to reach 619,000 bushels. Yield per acre for the whole crop is estimated at 17.5 bushels against 12.7 bushels per acre in 1943.

### Comparison with 1943

The condition of major field crops at the end of July 1944 is decidedly better in all provinces, except British Columbia, when contrasted with conditions on July 31, 1943. The improvement is most marked in eastern Canada and especially in Ontario and Quebec. The outlook there on July 31 a year ago was very unpromising and the final outcome proved very serious to live-stock producers in both provinces, but assistance was forthcoming from western Canada where a large reserve stock of wheat and feed grains was held.

Both Ontario and Quebec report conditions approaching normal this year in respect to feed grains, while the three Maritime Provinces and British Columbia appear to be quite favourably situated. The position in Alberta with respect to oats and barley is not so reassuring, the condition figures at the end of July this year being only slightly above those of a year ago.

Sugar beet prospects are a little better than a year ago despite the sharp drop in condition figures between June 30 and July 31 this year, while potato and turnip crops across the Dominion are mostly better than at the end of July last year. The exception is New Brunswick where the bumper potato harvest of 1943 does not appear likely to be repeated in 1944.

The condition of dry peas and beans is much better than it was a year ago in the areas of concentrated production, but a little ground was lost during July this year. Hay and clover crops are smaller on the whole, but fodder corn prospects are still substantial. Pasture conditions in a number of provinces are poorer than they were a year ago.



## Condition Figures

For all Canada, the condition of field crops at July 31, 1944, expressed as percentages of the long-time average yields per acre, was as follows, with the condition at June 30, 1944, and July 31, 1943, within brackets: Spring wheat 128 (113, 111); oats 90 (98, 79); barley 89 (97, 83); spring rye 86 (93, 75); peas 93 (94, 81); beans 93 (97, 79); buckwheat 93 (93, 88); mixed grains 95 (96, 75); flaxseed 81 (91, 71), corn for husking 90 (94, 76); potatoes 96 (98, 90); turnips, etc. 93 (95, 87); hay and clover 88 (89, 101); fodder corn 93 (94, 81); sugar beets 88 (93, 87); Pasture 90 (94, 104).

For the Prairie Provinces, the condition of the principal grain crops at the same dates was as follows: Manitoba - Wheat 163 (135, 148); oats 96 (97, 93); barley 92 (96, 91); spring rye 91 (92, 84); flaxseed 93 (95, 92). Saskatchewan - Wheat 126 (122, 117); oats 93 (104, 79); barley 93 (103, 82); spring rye 89 (98, 74); flaxseed 80 (94, 68). Alberta - Wheat 127 (86, 88); oats 80 (90, 76); barley 80 (90, 78); spring rye 75 (78, 70); flaxseed 72 (80, 72).

## Charts on Page 17

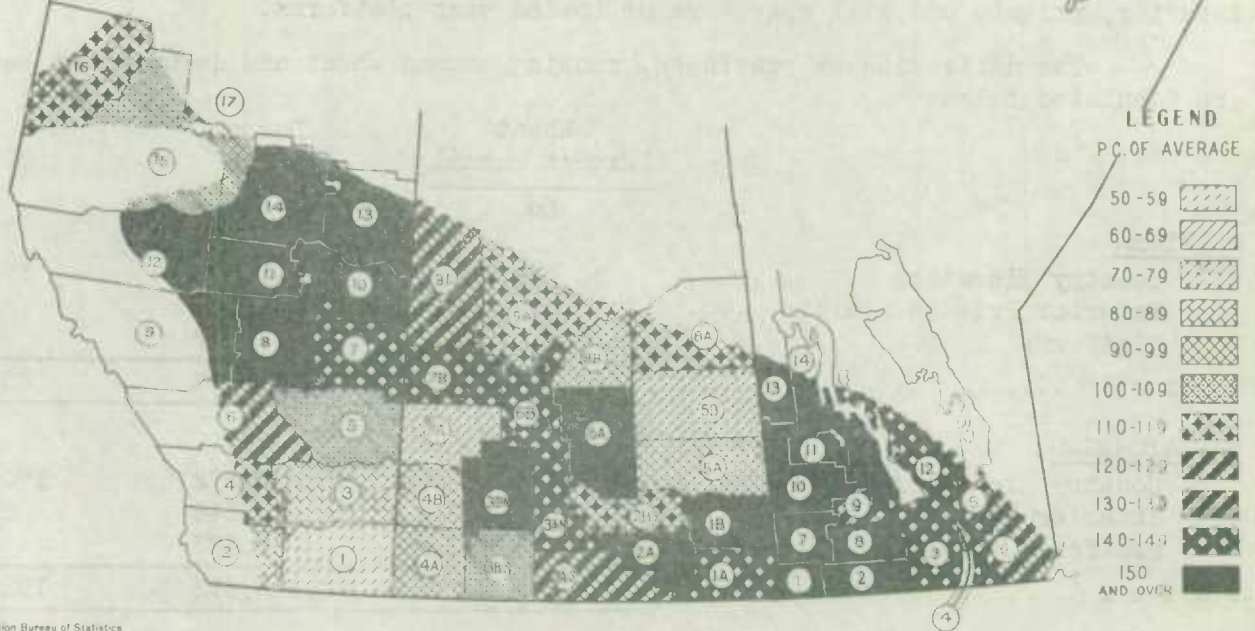
Two charts appear on the next page of this report showing the condition of wheat by Crop Districts in the three Prairie Provinces. The condition figures are based upon an analysis of weather factors in both years and are expressed in terms of the long-time average yields per acre for each province. For Manitoba this is 16 bushels, for Saskatchewan 15 bushels and for Alberta 18 bushels per acre.

## Area and First Estimate of the Production of Fall Wheat and Fall Rye (First Cutting), 1943 and 1944

	Area		Yield Per Acre		Production	
	1943	1944	1943	1944	1943	1944
	acres		bushels		bushels	
<u>Fall Wheat</u>						
Ontario .....	601,000	668,000	22.0	31.0	13,222,000	20,708,000
<u>Fall Rye</u>						
Ontario .....	64,000	62,400	16.5	19.1	1,056,000	1,192,000
Manitoba .....	45,000	34,000	14.4	18.2	646,000	619,000
Saskatchewan .	187,500	236,700	10.7	16.7	2,000,000	3,953,000
Alberta .....	54,800	82,150	14.0	18.4	766,000	1,512,000
CANADA .....	351,300	415,250	12.7	17.5	4,468,000	7,276,000

# CONDITION OF SPRING WHEAT IN THE PRAIRIE PROVINCES, BY CROP DISTRICTS

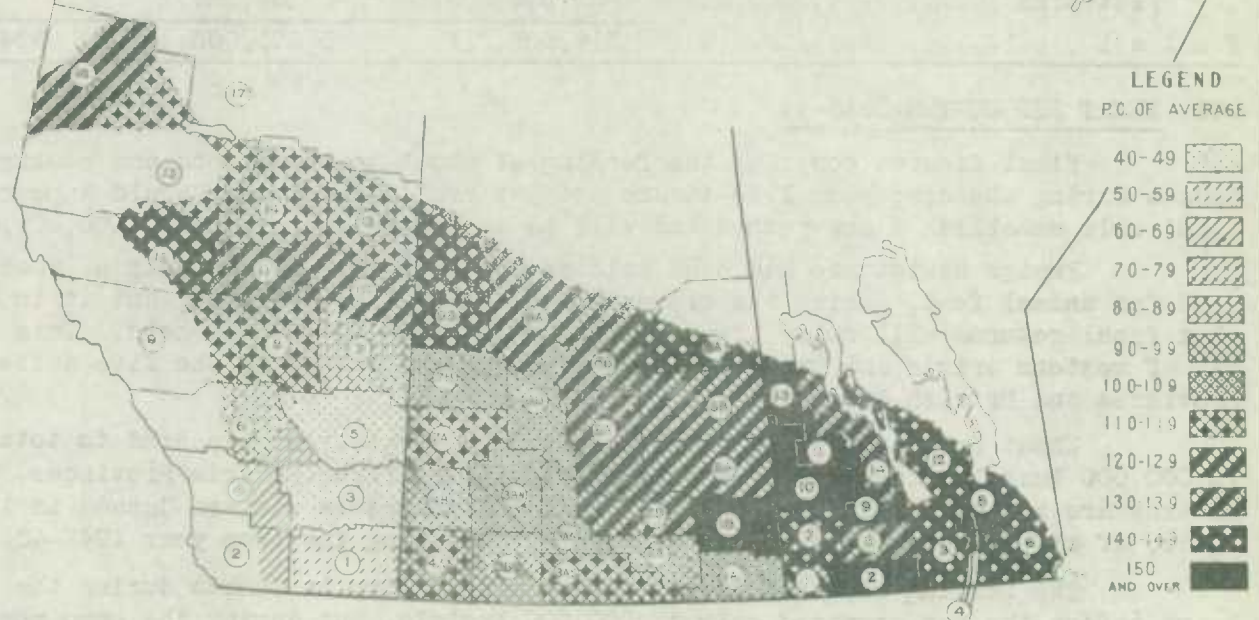
JULY 31, 1944



Dominion Bureau of Statistics

# CONDITION OF SPRING WHEAT IN THE PRAIRIE PROVINCES, BY CROP DISTRICTS

JULY 31, 1943



Dominion Bureau of Statistics



## VI. FARMERS' MARKETING 1943-44

A total of 325,000,000 bushels of wheat was delivered by farmers in the three Prairie Provinces during the crop year 1943-44, according to preliminary figures compiled by the Statistics Branch of the Board of Grain Commissioners. Country elevators received more than 319,000,000 bushels of this total, the balance being delivered to interior, private and mill elevators or loaded over platforms.

The deliveries by provinces, showing common wheat and durum wheat separately, are tabulated below:

	Wheat (Except Durum) bu.	Durum Wheat bu.	Total Wheat bu.
<u>MANITOBA</u>			
Country Elevators .....	36,741,358	2,897,380	39,638,738
Interior Private & Mills .....	675,649	41,160	716,809
Platforms .....	210,587	28,707	239,294
T o t a l .....	37,627,594	2,967,247	40,594,841
<u>SASKATCHEWAN</u>			
Country Elevators .....	188,186,640	2,330,372	190,497,012
Interior Private & Mills .....	2,239,161	85,348	2,324,509
Platforms .....	107,200	7,873	115,073
T o t a l .....	190,513,001	2,423,593	192,936,594
<u>ALBERTA</u>			
Country Elevators .....	89,224,720	-	89,224,720
Interior Private & Mills .....	1,912,475	165	1,912,640
Platforms .....	328,221	-	328,221
T o t a l .....	91,465,416	165	91,465,581
<u>PRAIRIE PROVINCES</u>			
Country Elevators .....	314,132,718	5,227,752	319,360,470
Interior Private & Mills .....	4,827,285	126,673	4,953,958
Platforms .....	646,008	36,580	682,588
T o t a l .....	319,606,011	5,391,005	324,997,016

## VII. WHEAT FED DURING 1943-44

Final figures covering the feeding of wheat to live stock and poultry in Canada during the crop year 1943-44 are not yet available, but it would appear that the total will establish a new record and will be in the neighbourhood of 100,000,000 bushels.

Freight assistance had been paid on almost 24,000,000 bushels of wheat to be used for animal feed, during the eleven months ended June 30, 1944, and it is expected that final returns will raise this total to at least 26,000,000 bushels. This wheat was all of western origin and was moved by Government assistance to the five eastern provinces and British Columbia.

Wheat retained on the farms for feeding purposes is expected to total around 75,000,000 bushels, the bulk of which was fed in the three Prairie Provinces. Complete returns are not yet available, but the feeding of wheat in western Canada is likely to equal, if not exceed, the 62,000,000 bushels fed during the crop year 1942-43.

The feeding of wheat to live stock and poultry in Canada during the five years before the war averaged only 32,000,000 bushels, but during the crop year 1942-43 it totalled three times as much and the figures for 1943-44 are even higher.



# VIII. LAKE SHIPMENTS IN 1943-44

The lake shipments of wheat from Fort William and Port Arthur during the crop year 1943-44 were only slightly below the record shipments made in the crop year 1928-29, while the shipments of all grains from the lakehead terminals established a new record.

A total of 292,729,000 bushels of wheat were shipped between August 1, 1943 and July 31, 1944 compared with 293,436,000 bushels in the same period sixteen years earlier. The distribution of this wheat showed 168,000,000 bushels to Canadian ports and almost 125,000,000 bushels to United States ports.

The following is a summary of all grains shipped from the lakehead during the 1943-44 crop year with comparative figures for 1928-29. These are taken from the records of the Board of Grain Commissioners.

	<u>To Canadian Ports</u>	<u>To United States Ports</u>	<u>Crop Year 1943-44</u>	<u>Crop Year 1928-29</u>
	- bushels -			
Wheat .....	168,079,600	124,649,315	292,728,915	293,435,687
Oats .....	12,327,286	38,450,025	50,777,311	27,574,096
Barley .....	15,064,983	27,148,009	42,212,992	40,237,312
Rye .....	497,527	8,944,313	9,441,840	7,007,448
Flaxseed ....	554,415	10,046,712	10,601,127	2,967,611
T o t a l ...	196,523,811	209,238,374	405,762,185	371,222,154

# IX. WHEAT VISIBLE SUPPLY

The following table shows stocks of Canadian wheat in store and in transit in Canada and the United States on August 17, 1944, along with comparative figures for approximately the same date in 1943 and 1942:

	<u>1944</u>	<u>1943</u>	<u>1942</u>
	(000 bushels)		
Country Elevators - Manitoba .....	9,570	30,795	15,620
Saskatchewan .....	65,480	116,400	65,940
Alberta .....	51,690	78,160	46,155
T o t a l .....	126,740	225,355	127,715
Interior Private and Mill Elevators .....	5,961	6,222	5,772
Interior Public and Semi-Public Terminals ....	10,991	14,329	19,265
Pacific Ports .....	16,810	19,497	19,291
Churchill .....	1,278	2,617	2,617
Fort William and Port Arthur .....	27,843	54,207	130,525
Eastern Elevators - Lake Ports .....	34,327	29,703	41,378
St. Lawrence and Seaboard Ports .....	21,284	10,541	21,978
United States Ports .....	15,103	6,863	16,620
In Transit - Lakes .....	2,379	1,849	979
In Transit - Rail .....	26,622	12,144	12,427
In Transit - U.S.A. ....	5,692	6,306	3,830
T o t a l .....	295,630	389,633	402,397



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# X. RAIL MOVEMENT FROM FORT WILLIAM-PORT ARTHUR

July shipments of wheat by rail from Fort William and Port Arthur to the five eastern provinces were the smallest in any single month during the crop year 1943-44, and less than half the quantity shipped during June. The total for the twelve months ended July 31, 1944 was about 5,000,000 bushels smaller than shipments during the preceding year, but a similar amount in excess of the shipments in the crop year 1941-42.

Quebec received most of the wheat shipped during July this year and No. 5 wheat was the predominating grade. This province also received most of the wheat moved by rail from the lakehead terminals during June, although previously the largest share went to points in Ontario.

Shipments month-by-month during the past three crop years are shown in the following table, covering the period August-July in each year.

	<u>1943-44</u>	<u>1942-43</u>	<u>1941-42</u>
	bu.	bu.	bu.
August .....	990,879	390,264	90,122
September .....	1,547,042	600,921	143,816
October .....	780,035	644,926	209,378
November .....	711,238	1,250,952	472,194
December .....	898,565	3,871,297	1,488,427
January .....	4,364,158	1,757,163	1,781,993
February .....	4,397,318	3,196,248	1,436,455
March .....	1,076,142	1,997,275	1,380,199
April .....	107,257	3,968,148	1,066,342
May .....	271,533	1,135,059	396,360
June .....	108,739	999,605	626,520
July .....	47,516	983,324	888,749
Total (12 Months) .....	15,300,422	20,795,182	9,980,553

Grades of wheat shipped during July 1944, and the provincial distribution of the rail movement are shown in the following table:

	Ontario	Quebec	Nova Scotia
	bu.	bu.	bu.
4 Northern .....	2,680	3,500	-
No. 5 .....	-	37,211	500
No. 6 .....	-	2,000	125
1 C.W. Amber Durum .....	1,500	-	-
T o t a l .....	4,180	42,711	625

GRAND TOTAL ..... 47,516