

DOMINION BUREAU OF STATISTICS AGRICULTURAL BRANCH

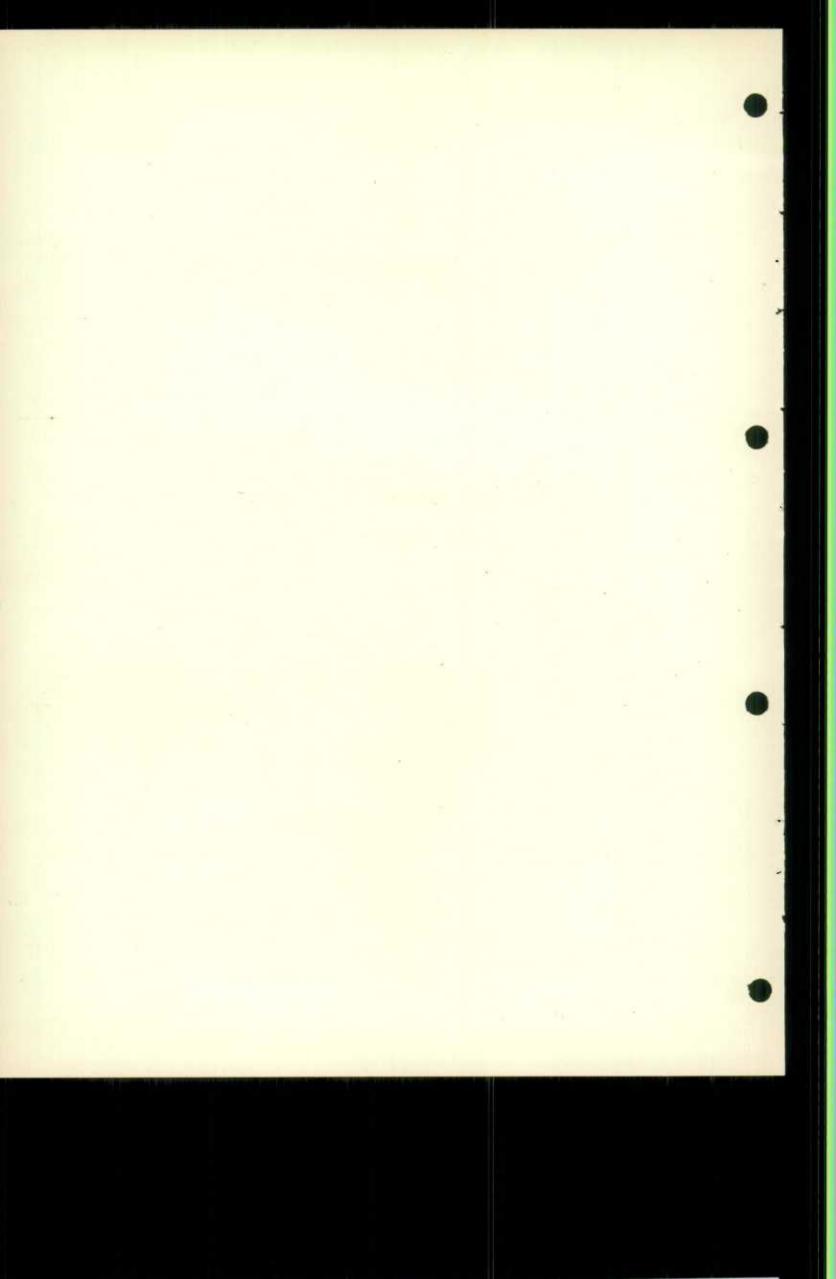
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MONTHLY REVIEW OF THE WHEAT SITUATION

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DEPARTMENT OF TRADE AND COMMERCE DOMINION BUREAU OF STATISTICS - CAMADA AGRICULTURAL BRANCH

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WORLD WHEAT SITUATION - SUMMARY

Greater significance attaches to the 1944 wheat harvest in North America than seemed at all likely eight or ten months ago. It is expected that 1,750,000,000 bushels of Canadian and United States wheat will disappear during the present crop year, and that the combined carry-over of the two countries will show a reduction of 540,000,000 bushels from the total a year earlier.

There is nothing in the present statistical situation to suggest that we shall be scraping the bottom of the barrel either in Canada or the United States in the very near future, but the rapidity with which the huge surplus of a year ago has fallen, combined with an unfavourable moisture situation in western Canada, focuses attention on new crop prospects.

Canada is expected to dispose of at least 500,000,000 bushels of wheat in the twelve months ending July this year, the largest disappearance in a single crop year since 1928-29 when the Dominion hung up its standing record for overseas exports. Domestic utilization will account for a minimum of 175,000,000 bushels of this total, while a substantial part of the balance will represent exports to the United States for live stock feeding purposes.

These figures suggest a Canadian carry-over of 375,000,000 bushels of wheat at the end of next July compared with the revised carry-over of 594,000,000 bushels or July 31, 1943. With this much wheat on hand, even a poor crop in 1944 would not threaten Canada's ability to export a very large volume of wheat during the crop year 1944-45, although it might result in the carry-over being reduced to more normal proportions by the middle of 1945.

It is perhaps of interest to note that Canada's smallest wheat crop in the past twenty-nine years was 180,000,000 bushels harvested in the very bad drought year of 1937. A crop no larger than this in 1944, added to the prospective carry-over, would permit of the disposition of 500,000,000 bushels in 1944-45 and still leave 55,000,000 bushels to be added to the 1945 harvest. The present moisture situation in western Canada certainly does not breed optimism, but at this early date neither does it preclude the possibility of a moderate wheat crop.

The demand for Canadian wheat in the United States has been a leading factor in building up the large disposition total in the current crop year. Were this demand to continue on the same scale in the new crop year and the need for large relief shipments from Canada also arise, our surplus could disappear in fifteen months, but there are increasing signs that United States demand might be lessened in 1944-45.

Winter wheat prospects have greatly improved in the United States during the past two months and the official estimate of production based on April 1 conditions was 602,000,000 bushels compared with 530,000,000 bushels harvested in 1943.

Spring wheat moisture conditions are more favourable than in Canada's prairie provinces and there is likely to be a much larger acreage for harvest in 1944 than in 1943.

Other aspects of the United States supply position worthy of note include the probability that much less wheat will be diverted to the production of industrial alcohol next season. A total of 110,000,000 bushels is expected to go into alcohol in the current year but molasses from Cuba are likely to substitute for wheat in 1944-45. Then there is in prospect a decline in the hog population and the official view that "a further increase in the number of grain-consuming animal units in 1944 from the present number, does not seem possible".

The wheet position in the other two countries making up the "Hig Four", is still very healthy. Argentina had a surplus of 254,000,000 bushels on April 1 after allowance had been made for domestic requirements and some relief shipments, while Australia's stocks of wheat about the same time totalled 190,000,000 bushels. How much of Australia's stock was surplus for export was not disclosed.

A large volume of Argentine wheat was reserved for fuel the past year, but this is not likely to be repeated in 1944 in view of the big corn crop now being taken off for which export markets may be difficult to find. Both Australian and Argentine farmers are now planting their new wheat crop and substantial acreage increases are expected to develop.

European Grops

Crop news from Europe continues to strike an optimistic note. Leather conditions have continued to favour the progress of fall-sown crops and have permitted rapid progress in spring seeding in most areas. Some delay in seeding operations is reported from the Balkan countries due to too much rain, and this fact together with military developments may curtail spring acresse.

Drought is still a complaint from Fortugal and Spain and hope of recovery from the toll taken of fall-sown crops is slim. Both countries will continue to require heavy importations of foreign wheat if bread rations are to be maintained oven at sharply reduced levels from normal consumption.

Acreage for the 1944 wheat harvest in the United Mingdom may show some reduction from a year ago, according to latest trade advices. The area sown to fall wheat is believed to have been below intentions, while the drought in 1944 has hampered spring sowings. Crops are reported to be well rooted and look healthy as that the cutturn is likely again to be substantial.

The position with respect to Russia remains obscine. The Nazis have now been driven out of the large grain producing areas of the Soviet Union but it is difficult to appraise in terms of grain supplies what this will mean to the Russians in 1944. There is no doubt that Russia benefited from grain territories wrested from the Mazis in the North Caucasus and eastern Ukraine a year ago, but indications point to the necessity of imports from the United Nations on a fairly substantial scale. Largely in the form of wheat-flour, during the ensuing year.

India's new wheat crop appears to have suffered weather and disease damage and the harvest may be considerably smaller than at first expected. Millet crops appear also to have suffered and since this is an important food crop in India the whole food situation in 1944-45 has been aggravated at a time when it was thought the difficulties of a year ago had been largely overcome. The need of continued imports of wheat and flour from anstralia, page Canada's gift, would seem to remain.

CANADIAN WHEAT STOCKS ON MARCH 31, 1944

Stocks of Canadian wheat in all North American positions on March 31, 1944 totalled 545,000,000 bushels or some 217,000,000 bushels less than the total at the end of March 1943. The amount held in bond in the United States was 14,000,000 bushels compared with just over 8,000,000 bushels on March 31, 1943. It is noteworthy also that almost 75 per cent of this year's total is held on farms or is in store in country elevators in the three Prairie Provinces. These figures are revealed in the annual March-end survey made by the Dominion Bureau of Statistics.

Wheat held on Canadian farms at the end of March this year totalled 210,000,000 bushels, a reduction of approximately 118,000,000 bushels or 36 per cent from the revised figure of 528,000,000 bushels reported for March 31, 1943. This is the second largest farm stock of wheat on record at the end of Lurch. It is nearly three and one-half times the average of the ten-year period 1930-1939, which was slightly less than 61,000,000 bushels, and is more than five times the 39,000,000 bushels on farms at the end of March 1938.

Of this year's total of 310,000,000 bushels on farms throughout Canada, the three Prairie Provinces account for 207,000,000 bushels, made up of 32,000,000 bushels in Manitoba, 117,000,000 in Saskatchewan, and approximately 68,000,000 bushels in Alberta. Out of these totals, seed for the 1944 wheat crop will be taken, while wheat fed to live stock and poultry between April 1 and July 31 this year, will reduce still further the quantities available for marketing as grain in each of the provinces.

Tentative estimates of the amount of wheat retained on farms for the feeding of live stock and poultry indicate a total of 75,000,000 bushels for the crop year 1943-44, compared with the revised figure of 81,000,000 bushels for the crop year 1942-43. The reduction this year is all accounted for in Ontario, where the crop was short in 1943. A moderate increase is indicated for the Frairie Provinces. These figures are exclusive of western wheat moved under the Federal Freight Assistance Telloy to the five eastern provinces and British Columbia to be fed to live according

Location of Stocks	Bushels
On Farms Country and Private Terminal Elevators Hestern Mills and Mill Elevators Interior Terminal Elevators Vancouver-New Mestminster Elevators Victoria and Trince Rupert Elevators Churchill Elevator Fort William-Fort Arthur Elevators In Trensit - Lakes Fastern Elevators	210,159,000 195,156,277 5,490,557 10,837,148 11,515,649 1,460,654 1,877,812 49,755,054 16,344,974 26,542,439 5,758,500
Total in Canada	531,398,157
Canadian Wheat in United States	14,001,109 545,399,266
Comparative Stocks, March 31, 1943 1/	
In United States	904.155,158 8,835,814
Total in Canada and United States	762,388,972

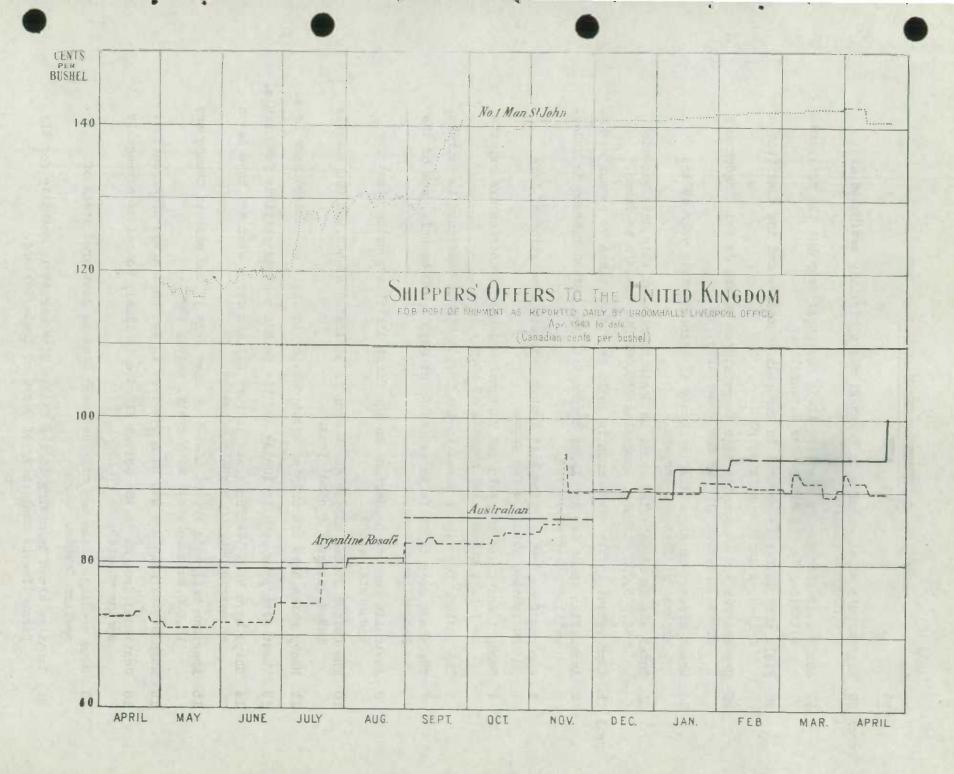
CHICAGO WHEAT FUTURES

The May wheat future at Chicago has been pushing against the ceiling during the past month but the deferred futures have shown some fluctuation and tended at times to weaken considerably. The strength in the nearby future is a reflection of the tight supply situation during the current crop year which ends June 30 in the United States, while the new crop months reflect the improved outlook for the 1944 winter wheat crop.

The Government estimate of winter wheat production, based on April 1 conditions, was 602,000,000 bushels compared with 530,000,000 bushels hervested in 1945. Weather conditions since that date have continued to favour the new crop and create better moisture reserves for the spring wheat crop which will be seeded on a larger acreage, if farmers carry out their intentions expressed at the end of March.

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

25 173/3 170/4 169/2 16 27 173/2 169/7 168/6 16 28 173/2 269/5 168/1 16 29 173/3 170/1 168/3 16 30 173/3 170/6 168/6 16	ember
25 173/3 170/4 169/2 16 27 173/2 169/7 168/6 16 28 173/2 269/5 168/1 16 29 173/3 170/1 168/3 16 30 173/3 170/6 168/6 16	
	.68/6 .68/5 .68/5 .68/3 .68/3
3 173/3 171 168/3 16 4 173/3 171/6 169/2 16 5 173/3 172/2 169/4 1	.6 7 , 7 .68 .49 .69 2
8 173/3 171/5 169/4 16 10 173/3 171/7 169/5 18 11 173/3 171/2 168/7 16 12 173/3 170/6 168/4 16 13 173/3 169/4 166/5 18 14 173/3 169/7 167/1 16 15 173/3 169/3 166/5 16 17 173/3 168/6 166/1 16 18 173/3 168/6 165/4 16 19 173/3 168/4 165/5 16 20 173/3 169/1 166/2 16 21 173/3 169/2 165/7 16 22 173/3 169/1 165/5 16	.69 .69/2 .68/4 .68 .66/4 .66/5 .66/1 .65/1 .65/3 .65/2 .65/2



- Warch 25 Argentina's wheat surplus on March 21 was officially estimated at 256,000,000 bushels.
 - 27 Australian farmers are planting their new wheat crop but the moisture situation is not altogether favourable.
 - 28 Field work is fairly general in European countries and the condition of fall-sown crops continues good.
 - 29 Dry weather and abnormally high temperatures in the United Hingdom may affect unfavourably the new wheat crop.
 - 30 Wheat acreage in Argentina is likely to increase this year at the expense of flaxseed acreage.
 - 31 Total stocks of Canadian wheat in North America at this date exceeded 545,000,000 bushels, including 210,000,000 bushels on farms.
- April 1 Improvement in the wheat crop in India has taken place in recent weeks.
 - 2 Australian wheat for April-May shipment to the United Kingdom is underselling other varieties.
 - 3 Reports from Fort William-Port Arthur indicate resumption of lake navigation within a few days.
 - 4 Drought continues in Spain and Portugal and both countries are expected to import substantial amounts of wheat.
 - 5 The cutlook for winter wheat in the United States continues to improve.
 - 7 The wheat crop in Chile is estimated at 33,000,000 bushels, one of the largest on record.
 - 8 Australia reports production in the first distillery using wheat for industrial alcohol.
 - 10 The United States winter wheat crop is estimated at 602,000,000 bushels based on April 1 conditions.
 - 11 Heavy rains have interrupted wheat cutting in India and caused some loss.
 - 12 Theat crop prospects in Turkey and the Balkan regions continue favourable.
 - 14 Ships have been loading grain at Fort William for a week and have taken on over 9,000,000 bushels of wheat.
 - 15 American railroads report that they have sent 16,000 cars to Canada and 13,000 have returned with grain, mostly wheat.
 - 16 Much needed moisture has been received in southern areas of Argentina.
 - 18 Continued drought in the United Kingdom is likely to reduce acreage in spring wheat.
 - 19 Some seeding of the new crop has been done in scattered areas of western Canada.
 - 21 Canadian wheat is moving in the Kansas City market in quantity for the first time in the memory of Board of Trade dealers.

UNITED STATES

Weather conditions in the United States southwest during the past two months have greatly favoured the winter wheat crop. The Department of Agriculture estimated production at approximately 602,000,000 bushels based on conditions as of April 1, 1944. This is an increase of 75,000,000 bushels over the estimate based on conditions last December 1. The indicated yield per acre is 12.8 bushels compared with 15.6 bushels per acre obtained in 1943. The lower yield per acre indicated this year is more than offset by the increase in acreage, the area seeded for the 1944 harvest being 47,127,000 acres compared with 37,834,000 acres seeded for the 1943 crop.

The official estimate of acreage remaining for harvest will not be made until May 10, but trade estimates of abandoned acreage have been ranging between 12 and 15 per cent. Even the upper limit of these estimates would leave about 40,000,000 acres for harvest compared with 34,000,000 acres harvested in 1943. The latest weather information points to additional moisture over important areas some in the form of snow, and there would appear now to be a need for warmer weather to hasten development of the plant.

Spring work has been delayed in some sections by the recent rains but field work is fairly general over a wide area, and the spring wheat farmers have indicated their intention to plant 19,805,000 acres of spring wheat, which is an increase of 2,500,000 acres over last year. The spring wheat crop in 1943 was almost 307,000,000 bushels compared with the ten-year average 1932-1941 of only 188,000,000 bushels. As in the case of western Canada, a comparatively dry fall was experienced in 1943 in the spring wheat States but considerable improvement has taken place this spring, and conditions are now believed to be better than those now prevailing in Canada's Prairie Provinces.

Wheat Statistics

Dealing with the statistical situation in wheat the Bureau of Agricultural Economics of the U.S.D.A. had the following to say in the March-April Review:

"The carry-over of old wheat on July 1, 1944 is expected to be about 300,000,000 bushels. This is based on an expected total disappearance of approximately 1,260,000,000 bushels—the largest in our history. Disappearance in 1944-45 will not be as large. Even if imports are materially above the estimated 125,000,000 bushels during the current year, feeding will necessarily be curtailed to at least half of what it is in 1943-44, and it may be necessary also to reduce the use of wheat in the manufacture of alcohol if we do not want our carry-over on July 1, 1945 to drop below a desirable level. Exports are largely in the form of flour, and it is for this reason that we will continue to have sizeable export commitments, even though we are on a net import basis. It is expected that flour mills in Canada and the United States will be called upon to operate to their maximum capacity."

The quantity of wheat expected to be fed in the twelve months ended June 30, 1944 is estimated at 470,000,000 bushels while an additional 110,000,000 bushels are earmarked for industrial alcohol production. Canadian wheat appears in both items and the estimated total imports from Canada during the present crop year are expected to reach a figure of 125,000,000 bushels. It is suggested in official publications of the U.S.D.A. that imports from Canada in the crop year 1944-45 may exceed this figure, but this will depend upon a number of factors, including the outcome of the 1944 harvest in both countries, as well as shipping conditions and price.

Stocks of wheat owned by the Commodity Credit Corporation at the beginning of March totalled almost 118,000,000 bushels. This was the largest stock on hand at the beginning of any month since September 1943. Sales of wheat for live-stock feed during February totalled just over 11,000,000 bushels compared with 19,000,000 bushels in January and an estimated 17,000,000 bushels in March. This makes a total of about 47,000,000 bushels for the first quarter of 1944 compared with 57,000,000 bushels sold in the first quarter of 1943, Only a trickle of wheat is going into the 1945 C.C.C. leans and redemptions by producers continue to rise. Figures compiled to April 8 show that loans had been completed on approximately 130,000,000 bushels of wheat from the 1943 crop, but at that date more than 88,000,000 bushels had been liquidated. Froducers' loans on 1948 wheat must be redeemed by the end of this month if the grain is stored on farms, and it is expected that with prices in the open market at ceiling lavels and above the loan values that most farmers will redeem these loans. Stocks of wheat on United States farms on April 1 were placed at 217,684,000 bushels compared with 325,387,000 bushels the previous year. Disappearance of wheat on farms in the first three months of 1944 exceeded 161,000,000 bushels compared with the ten-year average of 78,000,000 bushels. The January-March farm disappearance this year was below expectation and slightly less than the disappearance in the same three months of 1943. AUSTRALIAN CABLE The following cable has been received from the Canadian Covernment Trade Commissioner in Melbourne under date of April 17, 1944: "Australian wheat stocks early in April amounted to 190,000,000" bushels. The rate of production of flour to meet United Kingdom contracts is 84 per cent of flour mill capacity. Sales of offals and wheat for feed

"Australian wheat stocks early in April amounted to 190,000,000 bushels. The rate of production of flour to meet United Kingdom contracts is 84 per cent of flour mill capacity. Sales of offals and wheat for feed are higher due to continued drought conditions particularly in dairying areas. Some rain has fallen in the wheat areas of Victoria, New South Wales and South Australia, but generally much more moisture will be needed before seeding commences. Acreage sown to wheat last season aggregated 8,300,000 acres and it is hoped to increase this to 9,000,000 at least. The determining factor in acreage expansion will be the limited supply of phosphate for fertilizer as labour supply is adequate."

MINAT IN SOUTH AFRICA

Airmail advices from the Canadian Government Trade Commissioner in Johannesburg under date of March 8, 1944 report that the wheat crop in the 1942-43 season in South Africa totalled approximately 20,500,000 bushels. Imports of wheat during the year amounted to 715,000 bushels, but the country of origin is not named. No final estimate has been made of the 1943-44 crop which was harvested in November-December 1943, but the outturn is expected to be smaller than that of the year previous.

The Minister of Agriculture for South Africa placed consumption of wheat in 1943 at almost 20,000,000 bushels or just a little short of the previous harvest. It would appear then that imports will again be necessary during the calendar year 1944.

ARGENTINE LETTER

The correspondent of the Dominion Bureau of Statistics in Buenos Aires has forwarded the following report under date of April 4, 1944.

Crop Conditions

The official report on crop conditions, which failed to make any appearance last month, was issued on April 2, although in somewhat abbreviated form. It has the following to say with regard to wheat.

All reports agree that the recent rains were generally beneficial in anabling the furmers to make an early start with the preparation of the land for autumn sowings of wheat and other cereals. The land now is in excellent condition. The handicaps are a scarcity of fuel for the tractors and a shortage of labour. Prospects are that there will be a greater acreage under wheat than last year, with possibly a smaller area under linseed. This, however, is more or less guesswork at this early stage.

Supplies and Markets

Wheat shipments during March were 271,991 short tons in all, composed of 7,591,014 short tons of grain and 451,128 barrels of flour in terms of grain. The February exports totalled 265,084 short tons. The following statement shows the statistical position:

Second official estimate 1943-44 crop	260,876,010	bushels
Total supplies 84,509,130 bushels	370,564,929	п
Relief of War Victims	91,857,750	м
Surplus available for export	278,707,179	17
Shipments to) Wheat	24,491,738	79
Balance still available	254,215,441	11

There was more activity in the wheat market during March than had been the case for some time previously. Brazilian purchases were on an unusually generous scale, and at the present rate it is foreseen that she will absorb a million tons of Argentine wheat this year. Recent purchases by Portugal approximate 4,050,927 bushels, of which half is to be of the new crop and half of 1942-43 grain. Mexico is said to have already bought 5,063,658 bushels, and to be willing to take more if transportation can be secured. Spain on her "barter" deal is absorbing about 2,430,556 bushels of wheat per month, so that altogether much more business is passing than was in evidence a year ago.

Early in March the official Board commenced to offer wheat of the new crop (1943-44) for export at 11.50 pesos per 100 kilos (The price paid to the farmer is 8.0 pesos), but so far only Portugal is known to have bought any. Great Britain does not seem to be interested in it.

The Board's price for wheat of the preceding crop has been raised a little, 10.0 pesos being now quoted. Local millers are picking over parcels of the new crop, and are paying up to 8.0 pesos for the type they require. For Candeal of superior quality, if of good colour, 9.0 pesos is being paid.

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

I A THE SEC	(cents per bushel)							
	1936-37	1937-78	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	131,9
September	103.9	133.6	63.3	73.9	71.7	72.6	89.6	117.0
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	137.0	144.6	60.4	83.8	75.2	78.0	90.5	125.0
March	1.35.7	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	
May	1.30.6	115.2	65.5	79.7	75.9	79.3	99.0	
June	124.2	114.3	61.8	72.3	77.0	80.0	101.5	
July	145.6	98.4	55.3	71.4	74.7	80.8	109.3	

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	Manitoba Northern Fort William and Fort Arthur basis
	1930=100	1930=100	1930=100
1930	100.0	100.0	203.0
1931	83.3	87.8	62.4
1933	77.0	85.6	59.0
1933	77.5	85.7	84.3
1934	82.7	88.1	79.4
1935	83.3	89.0	89.5
1936	86.1	94.4	99,5
1937	97.7	108.8	142.3
1978	90.8	101.4	107.7
1070 00000000	87.1	102.8	68.5
1940	95.7	136.6	82.0
1941	105,9	152.6	79
2942	110.5	159.6	86.
Marc! 1943	113.9	162.2	1.03 .1
April	114.3	162.8	105.1
ligy	114.7	163.3	105.1
Juna	115.0	163.1	107.7
Tilly	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	110.4	163.4	135.7
Junuary, 1944	118.4	164.0	132.
Tobruary	118.6	164.6	132.7
March	118.9	2/	152.7

¹ Trepered by the Internal Trade Branch. B/ Not yet available.

CARADIAN SITUATION

I. NEW SEASON ACTIVITIES

The 1944 shipping season on the Great Lakes got off to a brisk start. The first vessels commenced to load on April 8, and in the week that followed more than 9,000,000 bushels of wheat, 1,262,631 bushels of oats and 2,344,215 bushels of barley were poured into the holds of grain carriers bound largely for United States ports. Buffalo received the bulk of the wheat and oats but most of the barley went to Duluth-Superior.

In the spring of 1943 the first steamer began to load on April 6, but only two cargoes were loaded prior to April 24 and it was the last week of April before grain began to move in volume from Fort William Port Arthur. The season this year, therefore, is at least two weeks ahead of last year. It is noteworthy also that more wheat, oats and barley moved between April 8 and 14 inclusive this year than was shipped during the whole month of April 1943.

The primary destinations of vessels loaded at Fort William-Fort Arthur in the week ended April 14, 1944 are shown in the following table:

	Wheat	Oats	Farley
	bu	bu.	bu.
Canadian Lower Lake Ports	1,763,390	00	129,563
St. Lawrence River Ports	71,000	-	
Buffalo U.S.A	6,396,613	1,110,148	213,735
Other U.S.A. Ports	940,041	152,483	2,000,917
Total	9,171,044	1,262,631	2,344,315

Weather Summary

Although a little seeding has been done in some sections of southern Alberta, spring work in the agricultural regions of western Canada is not yet active. The weather continues dry over most of the grain area and rainfall since the first of April has been below normal over a large part of the Frairie Frovinces.

The weather summary covering the first sixteen days of April, prepared by the Dominion Meteorological Service has the following to say:-

"Since April 1 little or no rain has fallen over southern and central Manitoba, west-central Saskatchewan and east-central Alberta. Above-normal rainfall has occurred in the Peace River District, as well as over north-central and east-central sections of the grain area of Saskatchewan. Elsewhere throughout the western grain region there has been below-normal rainfall for the first sixteen days of April.

"The largest excesses over normal mean temperature for the week ended April 16 were in the northern and central portions of the grain region. Over these areas temperatures were six to ten degrees or more above normal. In the facthilly of the Rockies, as well as in the southern sections of the agricultural area than were securily smaller excesses of the degrees."

II. EXPORTS OF WHEAT AND FLOUR

Complete export figures covering the first six months of the current cropyear show a total of 147,491,985 bushels of wheat and flour exported from Canada. This is 70,000,000 bushels more than was exported in the corresponding six months of the cropyear 1942-43, most of this increase being accounted for by shipments to the United States for live-stock feeding purposes.

It will be noted that upward revisions have been made in the expert totals for the crop years 1942-43 and 1941-42. These revisions result from changes reported in United States imports of Canadian wheat. The increase in the 1942-43 total exceeds 3,000,000 bushels, while for the previous year it is almost 4,000,000 bushels.

Exports during January 1944 were the largest of any month during the first half of the crop year and have not been equalled since April of 1942. The monthly average for the first half of the crop year stands at approximately 24,600,000 bushels, compared with an average of some 15,000,000 bushels during the first six months of the crop year 1942-43.

The following table sets out complete month-by-month exports to all destinations during the first six months of the current crop year and for the preceding four crop years.

	1943-44	1942-43 1/	1941-42 1/	1940-41	1939-40
			- bushels -		control desirable desirable (1) of (
August September October November December January March May June July	27,579,135 21,655,603 23,292,524 22,241,524 24,268,944 28,454,255	15,546,739 9,827,484 14,169,255 15,637,315 8,389,775 13,878,802 15,650,208 23,128,154 23,278,531 26,180,186 27,190,819 21,823,634	20,391,405 15,556,038 14,314,814 17,752,672 20,259,936 18,166,222 15,610,033 20,046,761 29,696,162 23,705,259 17,054,252 13,274,880	11,560,065 9,622,992 10,810,971 13,705,174 8,953,630 15,220,986 18,110,049 21,497,072 30,757,859 36,813,411 31,084,121 23,067,916	13.198.877 14,688,627 9,220,393 18,826,047 15,480,129 20,148,624 16,556,695 21,268,095 16,831,280 22,366,323 12,042,247 12,046,650
Crop Year Totals		214,700,902	225,828,434	231,206,246	192,674,358
Total for 6 Months August - January	147,491,985	77,449,370	106,441,087	69,873,816	91,563,097
6 Months' Exports as % of Crop Year Total		36.07	47.13	50.82	47,52

^{1/} Revised.

III. WHEAT SHIPMENTS TO U.S.A.

More than 17,000,000 bushels of Canadian wheat were moved to the United States during the four weeks ended April 13, 1944. The resumption of lake navigation contributed heavily to the increase in shipments which were more than double those of the preceding four weeks. Since only about 14,000,000 bushels were in store or in transit on April 13, the bulk of this wheat has disappeared either as an export overseas or an import into the United States for live-stock feeding.

During the first week of lake shipping more than 6,500,000 bushels of wheat left Fort William and Port Arthur for United States lake ports, the bulk of it billed to Buffalo but some destined also for Chicago and Erie. In addition, more than 2,500,000 bushels left western country points by rail and small shipments were made also from Pacific Coast terminals and from eastern elevators.

A summary of the total movement by rail and by steamer showing areas in which shipments originated is given below. This covers the period from August 1, 1945 to April 13, 1944.

Shipments from -	Busnels
Fort William-Port Arthur	77,324,659 18,268,639
Pacific Coast Alevators	14,926,401 22,496,114
Total	133,015,813

During the winter months most of the shipments have originated at points in western Canada or at the Pacific Coast. United States rail cars were supplied for the rail movement from the Prairie Provinces, but most of the Pacific Coast shipments have been made by vessel from Vancouver or New Westminster. From now on, however, the shipments by vessel across the Great Lakes will account for the bulk of the movement.

The terminal elevators at Fort William and Port Arthur had about 52,000,000 bushels of wheat in store when lake navigation was resumed on April 8, but this was reduced to 48,000,000 bushels on April 14, shipments being more than couble the receipts in that week. It is expected that the movement of wheat from country points to the lakehead terminals will continue in substantial volume during the coming months.

The following table lists the grades of Canadian wheat making up the total shipments to the United States between August 1, 1943 and April 13, 1944:

	Bushels
Grades shipped -	
No. 1 Hard	551,806
No. 1 Northern	17,328,915
No. 2 Northern	47,443,653
No. 3 Northern	39,199,256
Other Grades	27,235,882
No. 2 C.W. Amber Durum	1,017,768
No. 3 C.W. Amber Durum	238,533
Total	133,015,813

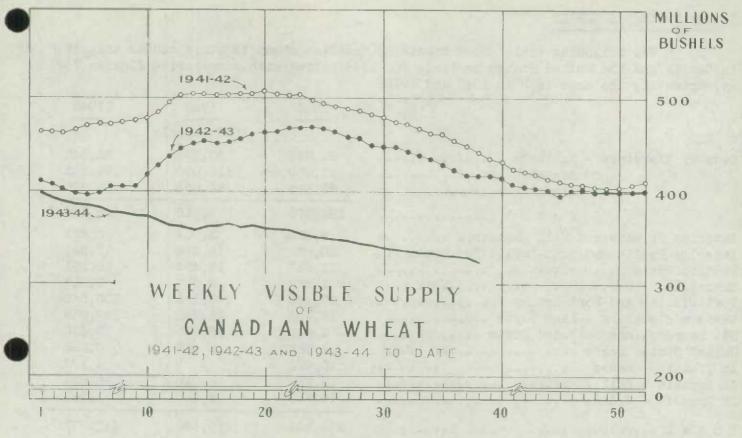
IV. FARMES' MARKETINGS IN WEST

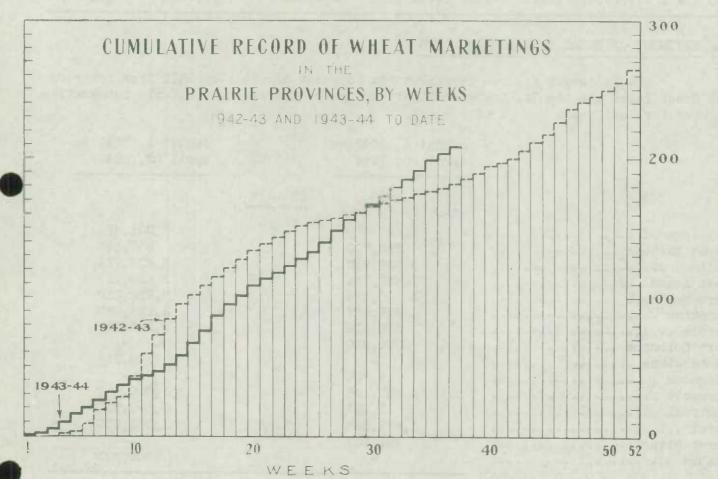
Producers in western Canada delivered to market more than 214,000,000 bushels of wheat during the thirty-eight weeks ended April 20, 1344. This was almost 29,000,000 bushels more than was marketed in the corresponding period last crop year.

Since the 18-bushel delivery quota went into effect about two months ago, western producers have marketed more than 47,000,000 bushels of wheat for an average of nearly 6,000,000 bushels weekly. All but two per cent of the delivery points in the west were on the 18-bushel maximum on April 21, 1944.

The following table shows primary receipts of wheat by weeks in the Francie Provinces during the 1943-44 crop year along with comparative figures for 1942-43

Week endir	ıg	Manitoba	Saskatchewan	Alberta	Totals	Last Year
				- bushels -		
August	1-5	57,657	279,815	246,948	594,420	485
	. 12	148,233	958,691	407,232	1,514,156	15,164
	19	285,074	1,773,075	1,354,924	3,413,073	352,523
	26	619,172	2,120,191	1,597,306	4,336,669	1,610,298
September	2	1,200,888	3,124,271	1,513,604	5,638,763	1,658,994
-	9	655,047	2,835,663	1,100,003	4,590,713	4,850,107
	16	782,765	3,258,644	1,331,775	5,353,184	10,689,344
	23	1,092,348	3,635,247	1,427,618	6,155,213	4,802,535
	30	671,910	3,036,891	1,239,927	4,948,728	3,432,189
October	7	514,543	2,375,620	1,103,026	3,993,189	15,611,588
	14	480,821	1,795,830	1,018,407	3,293,058	16,986,475
	21	525,806	1,880,566	810,824	3,217,196	13,004,882
	28	1,024,429	1,927,056	1,068,457	4,019,942	11,868,881
November	4	1,423,611	3,677,915	1,466,869	6,568,395	10,521,570
	11	2,625,264	4,171,833	1,992,099	8,789,196	7,480,345
	18	2,617,067	5,309,289	2,169,987	10,096,543	6,474,567
	25	2,810,965	5,263,236	1,858,404	9,932,605	5,747,765
December	2	2,119,419	5,254,345	1,542,106	8,915,870	6,518,753
	9	1,139,899	4,081,630	1,154,898	6,376,427	6,115,971
	16	943,716	4,560,168	1,240,800	6,744,684	7,038,196
	23	691,737	3,349,874	992,051	5,033,662	5,701,257
	30	383,028	2,801,300	901,037	4,085,305	4,327,027
January	6	449,856	3,541,271	1,271,675	5,262,802	3,568,971
	13	676,405	2,420,338	1,697,708	4,794,457	4,610,670
	20	397,494	2,915,245	2,249,347	5,561,996	3,407,828
	27	349,657	4,244,481	2,942,160	7,536,298	765,923
February	3	436,392	5,409,878	2,270,120	8,116,390	1,945,735
	10	314,902	4,812,838	2,780,827	7,908,567	2,755,888
	17	196,802	2,743,687	2,037,972	4,978,461	1,421,710
	24	246,938	3,141,932	2,086,798	5,475,658	3,114,871
March	2	369,573	3,983,652	1,933,446	6,386,671	2,768,657
	9	395,684	3,686,144	1,409,671	5,491,499	2,120,058
	16 1		3,592,262	2,138,713	6,219,006	2,350,411
	23	678,526	3,907,417	1,559,812	6,145,755	1,966,990
	30	694,934	4,323,545	2,386,598	7,405,071	2,053,150
April	- 6	373,102	2,784,579	1,657,506	4,815,187	1,790,260
	13	466,949	2,471,872	1,767,364	4,706,185	2.532,645
	20	397,353	3,603,872	1,961,846	5,962,471	4,257,687
Total		29,745,907	125,034,153	59,487,259	214,267,319	185,638,856





V. WHEAT VISUBLE SUPPLY

The following table shows stocks of Canadian wheat in store and in transit in Canada and the United States on April 20, 1944, along with comparative figures for approximately the same date in 1943 and 1948:

	1944	1945	1,942
		(000 bushels)	***************************************
Country Elevators - Manitoba	23,830 93,850 69,195	30,175 118,090 76,350	26,245 94,985 66,860
Total	186,875	224,615	188,090
Interior Private and Mill Elevators Interior Public and Semi-Public Terminals Pacific Ports Churchill Fort William and Port Arthur Eastern Elevators - Lake Ports St. Lawrence and Seaboard Ports United States Ports In Transit - Lakes In Transit - Rail	5,234 10,832 13,645 1,878 37,440 12,452 9,822 9,689 10,091 15,917 10,259	5,004 16,374 19,434 2,617 100,176 16,468 15,639 5,485	5,872 17,361 20,251 2,617 120,540 27,889 19,490 10,386 7,173 18,821 3,381
Total concessions concessions and the contract of the contract	324,134	417,642	441,871

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.

	August 1, 1943 to April 20, 1944	August 1, 1942 to April 88, 1945
	bush	els
Collingwood	1,227,979	2,371,450
Depot Harbour	255,700	367,692
Midland	3,334,912	8,831,714
Owen Sound	1,403,714	3,039,113
Port McNicoll	6,280,764	9,718,810
Goderich	859,437	2,293,030
Sarnia	463,919	2,525,384
Port Colborne	326,820	
Humberstone	C86	128,388
Kingston	14,700	
Frescott	1,257,168	1,020,613
Montreal	3,097	5,889,927
Sorel	1,877,969	1,003,070
Three Rivers	701.037	
Quebec		908,725
Total occourace consecues	23,007,216	38,097,853

VI. FREICHT ASSISTANCE SHIPMENTS

Claims paid on western wheat distributed under the Federal Freight Assistance Policy during the eight months ended March 31, 1944 cover more than 18,000,000 bushels compared with just over 11,000,000 bushels in the corresponding period of the crop year 1942-43. Figures for March of this year are still preliminary and subject to upward revision.

Almost half of this western wheat has been fed to live stock in Ontario but very substantial quantities have also been used for feed in Quebec, the Maritime Provinces and in British Columbia. A notable increase in the use of western wheat has been seen in Nova Scotia.

The provincial distribution is shown in the following table, by months, with comparative totals for the crop year 1942-43:

1943-44	Ontario	Quebec	New Brunswick	Nova Scotia	Prince Edward Island	British Columbia	Total
			- bu	shels -			
August	1,566,053	651,407	69,617	105,732	67,497	368,124	2,828,430
September	1,782,188	964,788	81,120	84,085	50,398	339,623	3,302,202
October	1,144,357	966,097	92,463	174,500	58,108	271,108	2,706,633
November	1,190,333	1,051,780	133,127	174,545	38,242	361,477	2,949,504
December	1,219,442	746,255	97,977	143,763	79,072	274,678	2,561,187
January	1,188,432	759,817	69,055	162,628	60,735	288,008	2,528,675
February	635,133	337,781	32,092	59,830	24,792	166,222	1,255,850
March	157,997	106,153	11,523	7,775	4,981	11,152	299,581
Total	8,883,935	5,584,078	586,974	912,858	383,825	2,080,392	18,432,062
Same Period 1942-43	4,665,039	3,999,208	466,098	582,332	243,866	1,411,672	11,368,215

Millfeeds

The distribution of millfeeds under the Freight Assistance Plan is shown for the five eastern provinces in the following table. One group of figures covers the period from the inception of the plan and the other the current crop year.

	October 1, 1941 to March 31, 1944	August 1, 1943 to March 31, 1944
	- to	ns -
Ontario	468,522	141,297
Quebec	699,762	165,979
New Brunswick	104,898	28,774
Nova Scotia	115,626	32,839
Prince Edward Island	27,221	9,155
Total	1,416,029	378,044

VII. RAIL SHIPMENTS FROM FORT WILLIAM-FORT ARTHUR

Rail shipments of wheat from the lakehead terminals at Fort William and Port Arthur fell away sharply during March to total just over 1,000,000 bushels or less than one-quarter of the movement in February. About two-thirds of the movement was billed to Atlantic seaboard ports and the balance largely to Ontario. The shipments by months during the present crop year and in each of the past two crop years are shown below.

	1943-44	1942-43	1941-42
	ou.	buo	bu s
August	990,879	390,264	90,122
September	1,547,042	600,921	143,816
October	780,035	644,926	209,376
Kovember	711,238	1,250,952	472,194
December	898,565	3,871,297	1,488,427
January	4,364,158	1,757,163	1,781,995
February	4,397,318	3,196,248	1,436,455
March	1,076,142	1,997,275	1,380,199
rotal	14,765,377	13,709,046	7,002,582

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

90,404,90E 495,60s,a . 258,640 mg,100	Ontario	Cuebec	New Brunswick	Nova Scotia
and the special specia		- bus	heIs -	
I Worthern	9.067	Stort, No. 11 and	TRANSPORT OF THE	
2 Northern	114,867	18,000	307,333	
	22,500	10,000		_
3 Northern			320,000	-
4 Northern	29,167	257 000	200	500
NO. 5	41,233	27,000	200	500
	24,200	8,022		-
Feed	7,667	4,550	co	(C)
Rej. 2 Nor.	4,564	ee .	-	-
Rej. 3 Nor.	1,561	77 000	670	40
Rej. 2 Nor. Mxd. Htd.	20,769	37,802	-	ca•
If. Rej. 2 Nor. Mxd. Htd.	= 004	6,000		444
Smutty 1 Nor	10,224	dom	600	-
Smutty 2 Nor	37,584	000	dess	-
Smutty 3 Nor.	9,190	4ser	-	an
Sple. Htd	des	3,000	-	COLD TO SERVICE STATE OF THE S
Tr. Sple. Htd.	-	1,500	THE PERSON OF TH	error .
Rej. 3 Nor. Mxd. Htd. Grav. & Cinders.	gras.	3,000	dem	ons.
C.W. Garnet	94	care .		,2m
C.W. A.D. noreuconny, , , occosoco co co	3,000	600	The 1 - 1 - 1	
Rej. 4 C.W. A.D. Mxd. Htd.	4 27	3,548		Clin
Potal	535,687	112,422	627,533	500

JISPOSITION OF CANADIAN WHEAT

Although the volume of Canadian wheat disposed of at home and abroad has been rising since the beginning of the war, records covering each of the first four years of hostilities show that disposition in relation to total supply declined between 1939-40 and 1942-43. The answer to this, of course, is the big wartime harvests experienced in Canada.

Production of wheat in Canada during the four years 1939-42 totallol 1,932,322,000 bushels, an average of 483,000,000 bushels annually. This production exceeded by 83,000,000 bushels the total quantity of wheat produced in Canada in the four years 1925-28, when four successive crops ran considerably above the average. Compared with the four years immediately before the present war, production in the 1939-1942 period was nearly 900,000,000 bushels greater in total.

The following table shows the statistical position year by year up to July 31, 1943.

Wheat and Wheat-Flour		Crop Ye	ars -	
	1939-40	1940-41	1941-42	1942-43
		- 000	bushels -	
Carry-over on August 1	102,911 520,623	300,473 540,190	480,129 314,825	423,752 556,684
Total Supply	623,534	840,663	794,954	980,436
Domestic Use				
Human Food	47,054 45,094 38,239	46,997 54,080 28,250	48,625 69,649 - 27,100	50,200 94,165 4,893 22,000
Total Domestic Use	130,387	129,327	145,374	171,258
Exports				
Wheat as Grain	162,158 30,516	184,907 46,300	179,902 45,926	158,112 56,589
Total Exported	192,674	231,207	225,828	214,701
Total Disposition	323,061 51.8%	360,534 43.9%	371,202 46.7%	385,959 39.4%

When the disposition figures are related to production each year a very different result is obtained. In the case of the 1941 crop, for example, the total disposed of during the crop year 1941-42 was 56,000,000 bushels greater than the 1941 crop, this difference coming out of the surplus carried over from previous crops. Here is the story told when this comparison is made.

	Production	Exported	% Production	Domestic Use	% Production
	000 bu.	000 bu.		000 bu.	
1939-40	520,623	192,674	37.0	130,387	25.0
1940-41	540,190	231,207	42.8	129,327	23.9
1941-42	314,825	225,828	71.7	145,374	46,2
1942-43	556,684	214,701	38.6	171,258	30.8
Total		864,410	44.7	576,346	29.8

Producers in the three Prairie Provinces and certain areas of British Columbia delivered 267,273,423 bushels of wheat during the crop year 1942-43. The maximum permitted under Government regulation was 280,000,000 bushels, but because of storage and other difficulties this total was not reached within the crop year. Permission was granted to many producers to deliver their 1942 wheat against their 1942-43 quotas during the current crop year, so that the final figure on marketings under the 1942-43 quota will come fairly close to the maximum figure of 280,000,000 bushels.

In the following table farmers' deliveries, as compiled by the Statistics Branch of the Board of Grain Commissioners, are shown in total for the twelve months ended July 31, 1943. There follows a breakdown by crop districts in each of the Prairie Provinces of the deliveries to country elevators only, subject to slight revision.

Total Farmers' Deliveries of Wheat

Prairie Provinces	Common Wheat	Durun Wheat	Total All Wheat
	bu.	bu.	buo
Country Elevators	259,945,303 2,575,836 401,770 12,029	4,160,221 115,113 63,151	264,105,524 2,690,949 464,921 12,029
Total	262,934,938	4,338,485	267,273,423

Farmers' Marketings through Country Elevators

and the location of the b	Common Wheat	Durum Wheat	Total Wheat
Manitoba	bu.	bu.	bu
Crop District 1	2,343,233	163,790	2,507,083
2	4,528,307 6,318,507	326,795 1,277,713	4,8 55,102 7,596,2 20
4	761,022 712,393	152,498 10,231	913,520 722,624
6	83,978	684	84,6 62 3,572,1 94
7	3,493,446 2,574,967	78,7 4 8 32,733	2,607,700
9	1,456,051 2,514,166	14,989 3,315	1,471,040 2,517,481
11	1,654,520 242,796	389 78	1,654,909 242,874
13	638,278		638,278
14 Stratton, Ontario	257,582 1,772		257,582 1,772
Total	27,581,018	2,061,963	29,642,981

Farmers Marketings through Country Elevators

	Common Wheat	Durum Wheat	Total Wheat
	bu.	bu.	bu.
Saskatchewan			
Gran District 14	A EAE COO.	ROA OFT	4 050 65
Crop District 1A	4,545,699	304,953	4,850,652
1B	3,934,992	89,801	4,024,79
2A	6,223,834	47,313	6,271,14
2B	11,617,232	398,035	12,015,26
3AN	6,226,166	84,282	6,310,44
3BN	11,554,779	109,435	11,664,21
3AS	10,621,694	190,262	10,811,95
3BS •••••••	8,799,481	4,320	8,803,80
4A	3,714,496	4,999	3,719,49
4B	8,432,076		8,432,07
5A	7,418,024	54,996	7,473,02
5B	7,219,163	25,234	7,244,39
6A	12,034,934	727,594	12,762,52
6B	10,914,300	45,925	10,960,22
7A	11,651,782	4,507	11,656,28
7B	6,811,584	1,503	6,813,08
8A	3,992,814	-	3,992,81
8B	6,288,545	62	6,288,60
9A	7,667,292	-	7,667,29
9B	5,293,582		5,293,58
Total	154,962,469	2,093,221	157,055,690
	154,962,469	2,093,221	157,055,690
Total	154,962,469	2,093,221	157,055,69
Alberta		2,093,221	
Alberta	8,677,484	2,093,221	8,677,48
Alberta Crop District 1	8,677,484 6,230,211	2,093,221	8,677,48 6,230,21
Alberta Crop District 1	8,677,484 6,230,211 2,861,462		8,677,48 6,230,21 2,861,46
Alberta Crop District 1	8,677,484 6,230,211 2,861,462 9,451,202	2,093,221	8,677,48 6,230,21 2,861,46 9,456,23
Alberta Crop District 1	8,677,484 6,230,211 2,861,462 9,451,202 5,516,718		8,677,48 6,230,21 2,861,46 9,456,23 5,516,71
Alberta Crop District 1	8,677,484 6,230,211 2,861,462 9,451,202 5,516,718 11,649,332		8,677,48 6,230,21 2,861,46 9,456,23 5,516,71 11,649,33
Alberta Crop District 1	8,677,484 6,230,211 2,861,462 9,451,202 5,516,718 11,649,332 7,646,393		8,677,48 6,230,21 2,861,46 9,456,23 5,516,71 11,649,33 7,646,39
Alberta Crop District 1	8,677,484 6,230,211 2,861,462 9,451,202 5,516,718 11,649,332 7,646,393 6,079,385		8,677,48 6,230,21 2,861,46 9,456,23 5,516,71 11,649,33 7,646,39 6,079,38
Alberta Crop District 1	8,677,484 6,230,211 2,861,462 9,451,202 5,516,718 11,649,332 7,646,393 6,079,385 718,093		8,677,48 6,230,21 2,861,46 9,456,23 5,516,71 11,649,33 7,646,39 6,079,38 718,09
Alberta Crop District 1	8,677,484 6,230,211 2,861,462 9,451,202 5,516,718 11,649,332 7,646,393 6,079,385 718,093 7,321,793		8,677,48 6,230,21 2,861,46 9,456,23 5,516,71 11,649,33 7,646,39 6,079,38 718,09 7,321,79
Alberta Crop District 1	8,677,484 6,230,211 2,861,462 9,451,202 5,516,718 11,649,332 7,646,393 6,079,385 718,093 7,321,793 2,282,565		8,677,48 6,230,21 2,861,46 9,456,23 5,516,71 11,649,33 7,646,39 6,079,38 718,09 7,321,79 2,282,56
Alberta Crop District 1	8,677,484 6,230,211 2,861,462 9,451,202 5,516,718 11,649,332 7,646,393 6,079,385 718,093 7,321,793 2,282,565 183,027		8,677,48 6,230,21 2,861,46 9,456,23 5,516,71 11,649,33 7,646,39 6,079,38 718,09 7,321,79 2,282,56 183,02
Alberta Crop District 1	8,677,484 6,230,211 2,861,462 9,451,202 5,516,718 11,649,332 7,646,393 6,079,385 718,093 7,321,793 2,282,565 183,027 1,488,659		8,677,48 6,230,21 2,861,46 9,456,23 5,516,710 11,649,33 7,646,39 6,079,38 718,09 7,321,79 2,282,56 183,02 1,488,65
Alberta Crop District 1	8,677,484 6,230,211 2,861,462 9,451,202 5,516,718 11,649,332 7,646,393 6,079,385 718,093 7,321,793 2,282,565 183,027 1,488,659 2,491,509		8,677,484 6,230,211 2,861,463 9,456,233 5,516,718 11,649,333 7,646,393 6,079,383 718,093 7,321,793 2,282,563 183,023 1,488,659 2,491,509
Alberta Crop District 1	8,677,484 6,230,211 2,861,462 9,451,202 5,516,718 11,649,332 7,646,393 6,079,385 718,093 7,321,793 2,282,565 183,027 1,488,659 2,491,509 498,753		8,677,484 6,230,211 2,861,463 9,456,233 5,516,718 11,649,333 7,646,393 6,079,383 718,093 7,321,793 2,282,563 183,023 1,488,653 2,491,503 498,753
Alberta Crop District 1	8,677,484 6,230,211 2,861,462 9,451,202 5,516,718 11,649,332 7,646,393 6,079,385 718,093 7,321,793 2,282,565 183,027 1,488,659 2,491,509 498,753 4,206,919		8,677,484 6,230,211 2,861,462 9,456,239 5,516,718 11,649,332 7,646,393 6,079,385 718,093 7,321,793 2,282,565 183,027 1,488,659 2,491,509 498,753 4,206,919
Crop District 1	8,677,484 6,230,211 2,861,462 9,451,202 5,516,718 11,649,332 7,646,393 6,079,385 718,093 7,321,793 2,282,565 183,027 1,488,659 2,491,509 498,753		8,677,484 6,230,211 2,861,462 9,456,239 5,516,718 11,649,332 7,646,393 6,079,385 718,093 7,321,793 2,282,565 183,027 1,488,659 2,491,509 498,753 4,206,919

FINAL ESTIMATE OF 1942 WHEAT CROF

The 1942 wheat crop in Canada is now finally estimated at 555,684,000 bushels, of which 529,000,000 bushels were produced in the three Prairie Provinces. This downward revision topples the 1942 crop from its previous high position as the largest crop of wheat ever produced in Canada, to that of second largest. The crop of 566,726,000 bushels produced in 1928 is still Canada's number one wheat crop.

Most of the writing down was done in Saskatchewan where the crop failed to measure up to indications at harvest time in 1942. It will be recalled that large tracts of farm land carried stocked and swathed wheat over the winter of 1942-43 and that for lack of storage space much threshed grain was piled up on the ground or in roughly conceived field storage. Losses attributable to mice, rabbits and other causes made inroads on this wheat and accounted for an undetermined proportion of the western wheat crop.

The revised and final production figures by provinces for the prairie region in 1942 are shown below. No change has been made in the production estimates for other provinces. These appeared in the crop report dated January 21, 1944.

	Bushels
Manitoba	53,000,000 305,000,000
Alberta	171,000,000
Total assessment accessors and	529,000,000

Farm Disposition 1942-43

Disposition of the western Canadian wheat crop during the crop year 1948-43 as related to farm movement only, is shown in the following table:

	Manitoba	Saskatchewan	Alberta	Prairie Provinces
		- thousand	bushels -	
On Farms August 1, 1942	1,200 53,000	2,500 305,000	5,500 171,000	9,200 529,000
Total on Farms	54,200	307,500	176,500	538,200
Deliveries from Farms	30,272 2,547 381 6,000 15,000	158,226 11,719 555 27,000 110,000	78,775 6,388 337 29,000 62,000	267,273 20,654 1,273 62,000 187,000
Total Disposition	54,200	307,500	176,500	538,200

^{1/} Final revision.

XI. ALCOHOL FROM WHEAT

About 10,000,000 bushels of Canadian wheat have been used by Canadian distilleries in the production of alcohol since the fall of 1942 when the use of wheat for this purpose was first reported. Statistics covering the crop year 1942-43 show that a total of 4,893,236 bushels of wheat, made up of 4,200,112 bushels as grain and 151,113 barrels of flour with a wheat equivalent of 693,124 bushels, went into the production of alcohol.

Figures compiled for the first eight months of the crop year 1943-44 indicate that a larger amount of wheat will be processed during the present crop year. Wheat used up to March 31, 1944 totalled about 3,750,000 bushels while almost 1,000,000 bushels more in the form of flour (212,938 barrels) had also been utilized. These figures were supplied by 13 manufacturers of alcohol in the Dominion.

Compared with the United States, only a trickle of Canadian wheat has been diverted to the production of industrial alcohol. It was originally estimated that the United States would use 150,000,000 bushels of wheat for the production of industrial alcohol during the crop year 1943-44, but this was later reduced to about 100,000,000 bushels. Efforts have recently been directed toward the use of materials other than wheat for alcohol production and it is fully expected that molasses from Cuba will sharply reduce the diversion of wheat to the alcohol industry during the crop year 1944-45.

MII. FLOUR MILLING INDUSTRY

The production of wheat-flour in Canada has been averaging more than 2,000,000 barrels of 196 pounds each monthly since the commencement of the current crop year. The industry is operating close to peak capacity and is on the way to establishing a new high mark in output.

Figures for March 1944 are not yet tabulated but during the seven months and a Petruary, more than 64,000,000 bushels of wheat went through the rollers compared with about 60,000,000 bushels in the same seven months a year earlier. Both the grindings of wheat and the exports of wheat-flour during the crop year 1942-43, were of record proportions, but there is every indication that the 1943-44 figures will in each instance except those of last season.

Apart from the much-needed flour for export, this heavy output from Canadian mills is producing a by-product for the feeding of live stock which is in urgent demand in Canada. Production statistics for the seven months ended February this year show that 475,787 tons of bran, shorts and middlings resulted from the production of wheat-flour. This represented an increase of almost 25,000 tons compared with the same seven months in 1942-43.

The Federal Government provides freight assistance on the movement of these millfeeds to the five eastern provinces and British Columbia, and according to claims paid between August 1, 1943 and March 31, 1944 a total of 378,000 tons of bran, shorts and middlings had been moved under the Freight Assistance Plan to the five eastern provinces.

Exports of millfeeds are under strict control and only a small percentage of the production is permitted to leave the country, but in spite of this and the much greater demestic production the demand continues to exceed the supply.

XIII. DELIVERY QUOTAS ON WHEAT

Delivery of 18 bushels of wheat per "authorized" acre was in force at 98 per cent of the delivery points in western Canada as at April 19, 1944. All points in Manitoba were at the limit level, while in Saskatchewan all but two per cent of the points were eligible to market 18 bushels. The position in Alberta showed 19 points still on a 14-bushel basis, but these represented only 4 per cent of the total number of delivery points in the province.

The summary of the quota position in all the western provinces, compiled by the Canadian Wheat Board as at April 21, 1944, is shown below:

Delivery Quota	Manit	oba	Saskatcl		Albei	ta	British (Columbia
	Points	%	Foints	%	Points	%	Points	%
14 bushels	an hulling	CMB	18	2	19	4		45
18 bushels	368	100	1,109	98	574	98	4	1.00

Taking the western provinces as a whole the position was as follows on April 21, 1944.

	Points	% of Total
14 bushels per "authorized" acre	37	2
18 bushels per "authorized" acre	2,055	98
Total	2,092	100

XIV. WHEAT PARTICIPATION PAYMENTS

It was announced on April 14, by the Hon, James A. MacKinnon, Minister of Trade and Commerce for Canada, that payments against participation certificates held by producers on the 1940, 1941 and 1942 wheat groups would total approximately \$39,000,000 to be distributed to about 200,000 farmers.

These payments will represent final settlement on the three crops in question and as stated by Mr. MacKinnon, would be as follows:

1940	********	6 3/8	3 cents p	er bushel
1941		14 7/8	cents p	er bushel
1942	* * * * * * * * * * * * * * * * * * * *	11 1/4	cents p	er bushel

It was further pointed out by the Minister that the actual per bushel payment for each grade will vary to allow for the differential between the initial spreads under No. 1 Northern wheat, which have necessarily to be estimated at the beginning of each crop year, and the final spread obtained from the sale. Payment figures for each grade will be brought to the closest third decimal point in each case.

The initial price paid by the Canadian Wheat Board on the 1940 and 1941 wheat crops was 70 cents per bushel, No. 1 Northern, basis in store Fort William-1 at Arthur or Vancouver, while for the 1942 crop the initial payment on the same basis, was 30 cents per bushel.