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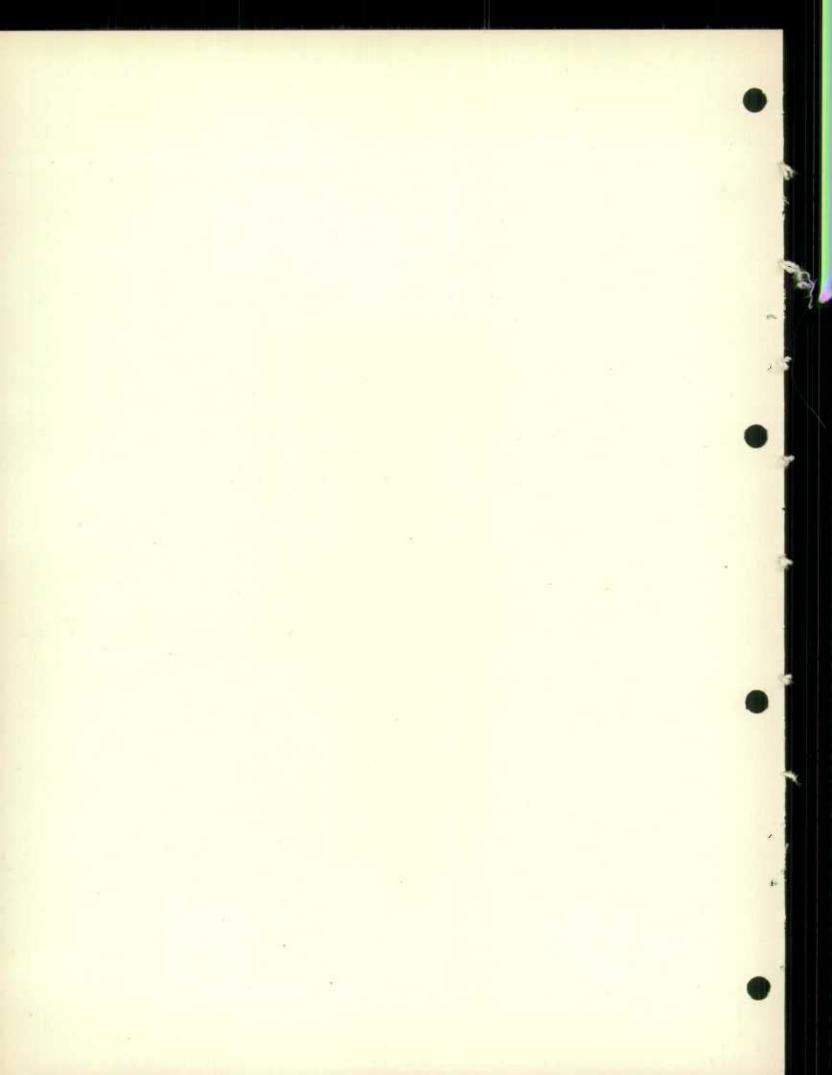
No. 9

MONTHLY REVIEW OF THE

WHEAT SITUATION

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DEFARTMENT OF TRADE AND COMMERCE DOMINION BUREAU OF STATISTICS - CANADA AGRICULTURAL BRANCH

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WORLD WHEAT SITUATION - SUMMARY

moment A forty per cent reduction in the Canadian carry over is in prospect for July 31, and the outcome of the 1944 wheat harvest is dependent almost entirely on rainfall received during the spring and summer months. On the eve of the invasion which it is hoped will liberate Europe from the Nazis and greatly enlarge the flow of relief food shipments, the wheat supply position in Canada is of major importance.

Production of an average crop in Canada's Prairie Provinces this year, together with the prospective carry-over at the end of July, would provide sufficient wheat for all purposes during the crop year 1944-45 and leave a sizeable reserve stock on July 31, 1945. A poor crop in 1944 would still permit of large exports from Canada, but it might result in stocks declining below a desirable level by the middle of 1945.

The moisture situation has definitely improved during May, especially in the large wheat-producing province of Saskatchewan. The rains have been both generous and timely. They ranged over most of Saskatchewan, and were particularly heavy in that province on May 22 where numerous points received between one and two inches of moisture in a 24-hour period. Some areas of Manitoba, particularly the Red River Valley, need much more rain, while sections of Alberta, partially relieved by recent rains, need further moisture.

Both Canada and the United States suffered from sub-normal rainfall last autumn. The winter wheat crop in the United States was seeded under most unfavourable moisture conditions but spring rains have been bountiful and prospects for the 1944 winter wheat harvest are now bright. The official estimate of production, based on May 1 conditions, was 662,000,000 bushels. This is approximately 132,000,000 bushels more than was harvested in 1943. Wheat cutting will commence soon in the Texas Panhandle and should be well underway in Oklahoma and Kansas by mid-June. The outlook for spring wheat crops in the United States is also fairly bright, and total wheat acreage is substantially greater than the area harvested in 1943.

Much of the excess wheat carried in North America during the past two years will have disappeared by the end of July, but a continuation of the kind of weather now prevailing over the main wheat belt of this continent will assure a harvest in 1944 sufficient to meet all domestic needs and provide a substantial surplus for export abroad. Canada's wheat harvest is still a long way off and rainfall during June and July, always vital to the prairie wheat crop, will this year be the all-important factor in production. A larger acreage has been seeded, private estimates being somewhat lower than the increase of 3,754,000 acres indicated in the official report of farmers' intentions in 1944.

Crop news from Europe, sketchy though it is, continues to reflect favourable conditions in most countries. The exceptions are Portugal, Spain and parts of the Balkans, where drought and delayed spring seeding have reduced prospects. The drought in Spain and Portugal has been partially relieved, but it is feared that permanent damage to crops will place both countries on a basis of substantial imports during the next crop year. Roumania appears to have the least promising prospects of the Balkan group due to late seeding of spring grains, shortage of fertilizer and labour difficulties.

Rains have fallen in the dry areas of the United Kingdom and while the wheat acreage is expected to be smaller than it was in 1943, the crop outlook for this year is quite promising. A slight increase in the use of imported flour in the National loaf has recently been granted, the percentage now being 12 1/2 compared with 10 per cent previously. The wheat acreage objective of 700,000 acres has not been attained in Eire, latest reports indicating no change from the 507,000 acres planted for the 1943 harvest.

India's wheat crop is now estimated at 387,000,000 bushels compared with almost 410,000,000 bushels last year, while the wheat crop in New Zealand is reported to be 9,630,000 bushels compared with 7,400,000 bushels harvested a year ago. Australian and Argentine farmers are now planting their new wheat crops, and in both countries an increase in acreage is expected. These two countries had a wheat surplus on May 1 of about 400,000,000 bushels of wheat.

Rainfall in Western Canada

Figures compiled from the official Meteorological records for the period April 1 to the morning of May 22, 1944 show that average rainfall in Manitoba was 1.29 inches compared with a normal of 2.21 inches for this period. The Saskatchewan actual averaged 2.14 inches compared with a normal of 1.90 inches, while Alberta rainfall averaged 1.63 inches compared with a normal of 2.02 inches.

The Saskatchewan position was greatly improved by heavy rains during the 24 hours ended 8 a.m. May 23 and except for one or two areas, actual rainfall up to that time was considerably in excess of normal. The rainfall in this 24-hour period included 2.32 inches at Lloydminster, 1.78 at Elbow, 1.30 at Moose Jaw, 1.78 at Battleford, 1.86 at Outlook, 1.79 at Regina, 1.49 at Saskatoon, 1.00 at Weyburn, 1.32 at Yellow Grass, 1.32 at Biggar, 1.56 at Davidson, and 1.06 at Strasbourg.

Reports from Manitoba indicated that the rain was moving in that direction, but details are not available at time of this writing.

1944-45 Wheat Policy in Canada

Speaking in the House of Commons on April 27, 1944 the Minister of Trade and Commerce, Hon. James A. MacKinnon, had the following to say with regard to wheat:

"The House will recall that last September a major change was made in wheat policy and a basis was established, effective until July 31, 1945, which of course includes the full crop year 1944-45. At that time the fixed initial price of wheat was increased to \$1.25 per bushel for No. 1 Northern wheat in store, Fort William, Port Arthur or Vancouver. This fixed initial price will be in effect for the coming crop year.

"In regard to the wheat policy for 1944-45, the government has yet to determine the quantity of wheat which will be marketable in this crop year. Members will recall that for 1943-44 the limitation was first placed at fourteen bushels per authorized acre and was later increased to eighteen bushels per authorized acre — the understanding being that about 280,000,000 bushels of wheat would be marketable in western Canada during the present crop year.

"The government is not prepared at the moment to state the exact quantity of wheat which will be marketable in the coming crop year, owing to the uncertainties of the growing crop and uncertainty in respect to the volume of transportation which will be available for the movement of grains in 1944-45. In establishing the basis of marketings for the coming crop year, which will be announced at a later date, the government will take into account probable domestic and export demand in 1944-45 as well as the volume of grain which the railroads and elevators can handle during the crop year. The volume of wheat which will be marketable in 1944-45 will be considerably larger than the limitation in effect during the past two crop years."

ACREAGE INTENTIONS IN 1944

Acreage intentions of Canadian farmers as at April 30, 1944 pointed to an increase of 3,848,100 acres in the area to be sown to wheat in 1944 compared with 1943. All but a small fraction of this increase was indicated for the three Prairie Provinces, where farmers proposed to reduce acreage seeded to oats and barley and to lower the area under summerfallow.

If these intentions are carried out, the area seeded to wheat in Canada in 1944 will be £1,326,000 acres compared with 17,488,000 acres in 1943. The position in the three Prairie Provinces would be approximately as follows:

	Intentions 1944	Acreage Seeded in 1943	Proposed Increase
	acres	acres	acres
Manitoba	1,968,000 12,720,000 5,795,000	1,640,000 10,260,000 4,829,000	328,000 2,460,000 966,000
Totals	20,483,000	16,729,000	3,754,000

The shifts that have taken place in acreage seeded to the principal grain crops in western Canada during the war years will be seen in the following table which sets out the seeded acreage and summerfallow during the eight years 1936 to 1943, together with the intentions figure for 1944:

Seeded Acreage and Summerfallow in Prairie Provinces, 1936-1943

	Wheat	Oats	Barley	Flaxseed	Summerfallow
		(thousand acre	s)	The Roman
1936	24,838	8,674	3,724	469	16.855
1937	24,599	8,579	3,562	233	15,150
1938	24,946	8,518	3,687	202	16,206
1939	25,813	8,227	3,607	289	15,950
4-year average.	25,049	8,500	3,645	298	16,040
1940	27,750	7,818	3,622	364	17,326
1941	21,140	8,137	4,735	982	23,111
1942	20,653	9,666	6,414	1,466	19,979
1943	16,729	11,790	7,896	2,918	20,637
4-year average.	21,568	9,353	5,667	1,433	20,263
1944 1/	20,483	11,062	7,358	2,042	19,518

^{1/} Intentions indicated on April 30, 1944.

The 1944 acreage objective for wheat in Canada set at the Dominion-Provincial Agricultural Conference last December was 17,500,000 acres with approximately 16,800,000 acres in the West. This represented no change from the 1943 seeded area.

CHICAGO WHEAT FUTURES

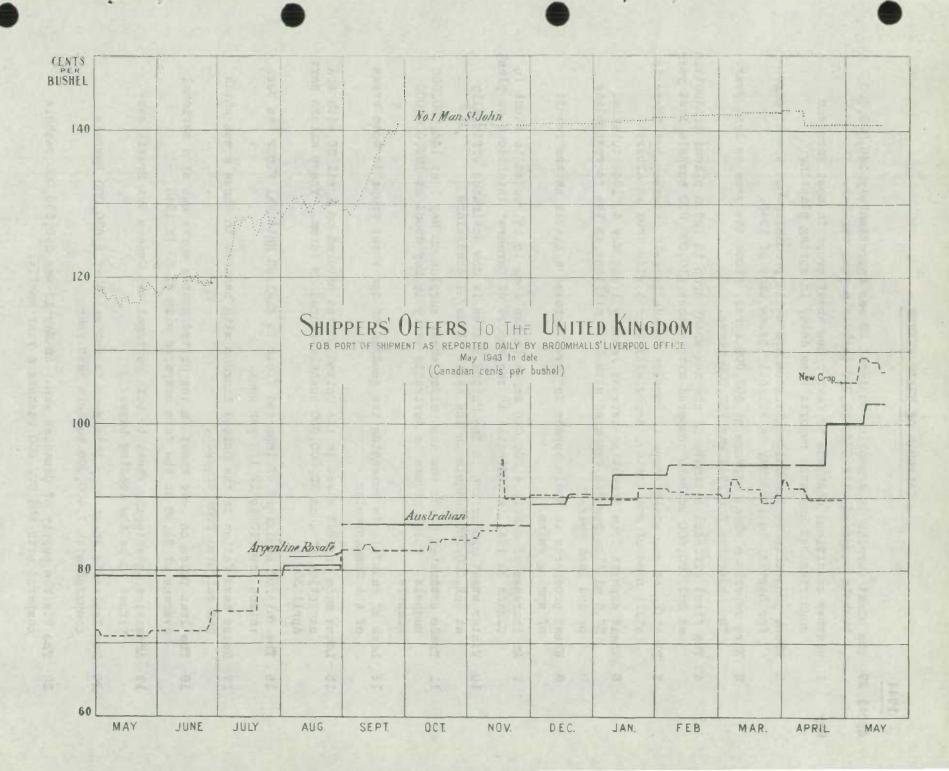
The price of May wheat at Chicago continued at the ceiling level during May, reflecting the tight cash wheat position in the United States, but the distant futures were affected by the improving crop prospects and continued to lose ground. The July position showed a loss of 5 cents per bushel during the first half of the month and similar declines were recorded in the September and December futures.

An official estimate of the 1944 winter wheat crop, based on May 1 conditions, placed production at 662,000,000 bushels which is 132,000,000 bushels more than was harvested a year ago. The spring wheat crop prospects are also fairly promising and the acreage is expected to be considerably larger than that of a year ago.

Canadian wheat continues to go to the United States in good volume for live-stock feeding purposes but is going into consumption as rapidly as it arrives. Demand is expected to continue keen for the balance of the crop year.

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

19	944	May	July	September	December
			(cents and	eights per bushel)	
April	25	173/3	170/4	166/6	166/3
	26 27	173/3	171 170/6	166/6 166/5	166/3 165/7
	28	173/3 173/3	170/5	166/4	165/6
	29	173/3	170/2	166/2	165/5
May	1	173/3	170	166/1	165/3
	2	173/3	169/6	165/6	165/1
	3	173/3	170/1	166/1	165/5
	4	173/3	170/1	166/4	165/7
	5	173/3	169/7	166/3	165/7
	6	173/3	169/7	166/1	165/4
	8	173/3	170	166/2	165/5
	9	173/3	169/6	166	165/3
	10	173/3	169/5	166/1	165/1
	11	173/3	167/2	163/6	163
	12	173/3	166/7	163/3	162/3
	13	173/3	166/1	163/1	162/2
	15	173/3	165	161/6	161/4
	16	173/3	165/7	162/4	162/2
	17	173/3	165/4	161/4	161/2
	18	173/3	166/6	163	162/6
	19	173/3	165/3	162	161/7
	20	173/3	164/2	161/3	161/1
	22	173/3	164/5	161/6	161/7
	23	treat with the last of each	161/5	159/5	159/7



1944

- April 29 The wheat surplus in Argentina on April 25 was approximately 246,000,000 bushels compared with 277,000,000 bushels a year earlier.
- May 1 Weather conditions continue to favour new wheat crops in most European countries but Roumania reports some delay in spring planting.
 - 2 Wheat prospects in the United Kingdom are still promising but the acreage for harvest in 1944 may be slightly below that of 1943.
 - 3 Eire reports a wheat acreage of 507,000 acres, about the same as last year.

 The objective for 1944 was 700,000 acres.
 - 4 The first official estimate of the new wheat crop in India places production at 387,000,000 bushels compared with almost 410,000,000 bushels last year.
 - 5 Planting of new wheat crops in western Canada is well underway but there is still need of good rains, especially over a wide area in Alberta.
 - 6 Wheat exports from Argentina between January 1 and May 4, 1944 totalled 37.5 million bushels compared with 28.1 millions in the corresponding period last year.
 - 8 Wheat prospects in Spain appear to have improved a little as the result of spring rains.
 - 9 An increase of nearly 4,000,000 acres in the area to be seeded to wheat in Canada in 1944 is indicated in the report of farmers' intentions to plant.
 - 10 Winter wheat production in the United States is now estimated officially at 662,000,000 bushels on the basis of May 1 conditions.
 - ll Trade estimates place the Australian wheat surplus on May 1 at 144,000,000 bushels. Total stocks in Australia early in May stood at 182,000,000 bushels.
 - 12 Lack of rainfall is retarding the seeding of new wheat crops in some areas of the Commonwealth.
 - 15 Loans made on 1943 wheat in the United States matured on April 30 with the exception of some 22,000,000 bushels stored on farms. These mature next April 30.
 - 16 The rate of admixture of imported flour in English National Flour has been raised from 10 to 12 1/2 per cent.
 - 17 Rains have fallen in the United Kingdom with benefit to those areas which had suffered from drought.
 - 18 The loan price on 1944 wheat in the United States works out at a national average of \$1.28 on the farm compared with \$1.23 in 1943.
 - 19 Argentina is shipping wheat to both Portugal and Greece but Brazil continues to be the leading buyer.
 - 20 New Zealand's wheat crop this year is estimated at 9,630,000 bushels compared with 7,400,000 bushels last year.
 - 22 The visible supply of Canadian wheat on May 19 was 290,590,000 bushels compared with 404,000,000 bushels a year earlier.

UNITED STATES

Good rains during april improved the outlook for winter wheat production in the United States, and the official estimate based on May 1 conditions indicated a crop of 662,000,000 bushels, an increase of 60,000,000 bushels over the April 1 forecast. The acreage remaining for harvest is approximately 41,000,000 acres, about one-fifth larger than the acreage harvested in 1943, and the largest acreage remaining for harvest since 1938.

Abandonment of acreage in some areas was quite heavy and this was particularly so in the western portion of the Southern Plains States. The over-all abandonment is placed at 13.1 per cent, compared with 10.3 per cent in 1943, and the ten-year average of 19.5 per cent. Dry soil conditions at the time of seeding and failure of the wheat to germinate was the principal cause of abandonment of acreage.

The official report of May I indicated that sunshine and more seasonal temperatures were needed if the improvement in crops was to be maintained. It would appear from the most recent reports that crops have been favoured in this respect, and that growth has been rapid during the first half of May. The weather report from Kansas dated May 16 indicated that the previous week's sunshine was considerably above normal with temperatures in the high 80's and even into the 90's.

Winter wheat in Kansas was either heading out or in the sheath by mid-May and, although some of the crop is late due to cool weather in April, it is expected that harvesting operations will get underway about the usual time. The United States railways are making preparations for the shipping of new grain and have withdrawn most of the cars that have been coming into western Canada for Canadian wheat and other grains to be shipped to the United States.

1944 Wheat Loans

The loan program for 1944 wheat was announced from Washington on May 16. The national average this year will be \$1.28 per bushel at the farm, compared with the average of \$1.23 per bushel loaned on the 1943 crop. Loans will be made on terms similar to other years, the basis for wheat stored on farms to be a note and chattel mortgage, while for wheat stored in approved warehouses the basis will be a note and loan agreement.

A storage allowance of 7 cents per bushel will be advanced at the time of the loan on all wheat to be stored on farms. It is indicated that loans will mature on both farm-stored and warehouse-stored wheat not later than April 30, 1945. This is a change from previous years when farm-stored wheat was given a two-year period.

Loan values per bushel at selected terminal markets are as follows for certain types of wheat:

	No. 1 Win				l Dark . Spring
Kansas City	\$ 1	. 44	Minneapolis	\$	1.46
Omaha	1	. 44 . 52 . 49			l Soft White
St. Louis		. 49	Portland	3	1.39

The final report on the 1943 wheat loan program has been issued and shows that loans were completed on almost 130,000,000 bushels of 1943 wheat. Except for those secured by 1943 wheat stored on farms, these loans matured at the end of April. Redemptions had been heavy throughout the season as the open market prices advanced, so that only about 22,000,000 bushels were outstanding on May 6, 1944, this being the quantity stored on farms, loans on which mature not later than April 30, 1945.

Wheat from Canada

With the opening of navigation on the Great Lakes shipments of Canadian wheat to the United States were made in substantial volume. Shipping records for period April 8 to May 14 inclusive show a total of almost 20,000,000 bushels of Canadian wheat shipped to Buffalo and 6,000,000 bushels to other United States lake ports. This represented about 46 per cent of the total movement of wheat from Fort William and Port Arthur by vessel during the first five weeks of the new shipping season. The bulk of the movement took place in April and was heaviest during the first two weeks of navigation.

It is expected that rail movement of Canadian wheat to the United States will be very restricted during the summer months, but it is noteworthy that between August 1, 1943 and May 11, 1944 almost one-third of the Canadian wheat shipped to the United States went by rail. A large part of this went direct from points in western Canada. Some of this movement proceeded overseas from United States ports, but there are indications that more than 100,000,000 bushels of Canadian wheat were earmarked for use in the United States during the nine months ended April 30, 1944.

AUSTRALIAN CABLE

The following cable has been received from the Canadian Government Trade Commissioner in Melbourne under date of May 17, 1944:

"Australian wheat stocks early in May amounted to 182,000,000 bushels. Immense quantities of wheat flour are being exported with the result that flour mills in Australia are producing at 85 per cent of their capacity. Sales of offals and wheat to doiny farmers are continuing at high levels.

"In Western Australia dry conditions continue, but good rains have fallen in South Australia and over most of the wheat areas in Victoria. Useful rains recently have eased the position in New South Wales, where the absence of moisture was becoming serious. Seeding is proceeding in most States, but no indication is yet available regarding acreage. The target is still set at 9,000,000 acres, but its achievment depends on weather conditions in the near future and the availability of phosphate for fertilizer".

A cable received in February indicated that the acreage seeded to wheat for the 1943-44 crop was approximately 8,300,000 acres, and while it was the desire of Commonwealth officials to see the 1944-45 wheat acreage raised to the pre-war level of 13,000,000 acres, it was considered doubtful in view of the manpower and fertilizer situation if this could be attained. The wheat acreage seeded (for grain only) in Australia in 1938-39 was just over 14,000,000 acres, but in 1939-40 it showed a reduction of 1,000,000 acres and has been declining ever since.

ARGENTINE LETTER

The correspondent of the Dominion Bureau of Statistics in Buenos Aires has forwarded the following report under date of May 3, 1944.

Crop Conditions

According to the official monthly report of the Ministry of Agriculture on conditions in the cereal producing regions of the country, the rains which fell in the month of April permitted normal progress to be made with the work of preparing the land for planting wheat and linseed, except in the zones where the precipitation was excessive and caused flooding of the grain fields and pasture lands with the resultant damage to the crops and live stock.

Supplies and Markets

Exports of wheat during April totalled 10,547,000 bushels, 8,803,000 bushels in the form of grain and 1,744,000 bushels as flour in terms of grain. These shipments compare with a total of 9,065,000 bushels in March.

The statistical position of wheat is now as follows:

Second official estimate 1943-44 crop		bushels
Total Supplies	370,565,000	19
Seed and domestic requirements 84,509,000 bushels Relief of war victims 7,349,000 "	91,858,000	n
Surplus available for export	278,707,000	п
April 30) Wheat as flour 4,938,000 "	35,039,000	17
Balance still available	243,668,000	Pf

With the shipments of wheat, including flour, approaching the millionten mark, and the remaining exportable surplus not much greater than would have been considered normal in the pre-war years, anxiety as to the Argentine wheat situation has practically been dissolved.

Moderate sales were made during the month, with Brazil the principal buyer, followed by Spain, Portugal and Great Britain. Mexico and the other Latin American countries also all showed interest in varying degrees, transportation difficulties being responsible for hesitation in concluding business.

The official Board, now known as the Agricultural Regulating Board, took advantage of the improved business atmosphere to make fractional increases in its export prices, raising the 1942-43 wheat to 10.20 pesos per 100 kilos and the 1943-44 grain to 12 pesos, both for wheat of 62 1/2 pounds per bushel.

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	
June	124.2	114.3	61.8	72.3	77.0	80.0	101.5	
July	145.6	98.4	5 5.3	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).

980,082463 000,680,08	General Index Canada 1930=100	Board of Trade United Kingdom 1930=100	Wheat No. 1 Manitoba Northern Fort William and Port Arthur basis 1930=100
1930	100.0	100.0	100.0
L931	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
.936	86.1	94.4	99.5
.937	97.7	108.8	142.3
938	90.8	101.4	107.7
939	87.1	102.8	68.5
940	95.7	136.6	82.0
941	103.9	152.6	79.3
.942	110.5	159.6	88.6
pril 1945	114.3	162.8	105.1
lay oceonomenen	114.7	163.3	105.1
une	115.0	163.1	107.7
uly		164.0	116.0
ugust	115.9	162.2	118.8
September	116.7	162.9	124.7
ctober	117.7	162.5	131.7
lovember	118.2	162.7	132.7
ecember	118.4	163.4	132.7
anuary 1944	118.4	164.0	132.7
ebruary	118.6	164.6	132.7
larch	118.9	164.9	132.7
April	118.8	2/	132.7

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

THE CANADIAN SITUATION

I. WHIAT SUPPLY POSITION

On the basis of incomplete export returns to the end of April 1944, the surplus of Canadian wheat for export or carry-over on May 1 was approximately 177,000,000 bushels less than at the same date in 1943, the figures being 493,000,000 and 670,000,000 bushels respectively.

Almost 100,000,000 bushels of this difference results from the smaller surplus available at the beginning of the 1943-44 season compared with the previous year, while the balance represents the heavy increase in exports of Canadian wheat to the United States for live stock feeding purposes.

Exports of wheat and flour to the end of April, exclusive of April 1944 exports to the United States, show an increase of more than 80,000,000 bushels over shipments in the same nine months of the crop year 1942-43. Shipments of wheat-flour are larger this season but overseas exports of wheat are lagging compared with last season.

The following table sets out the statistical position of Canadian wheat this season and last, with the available surplus calculated to May 1 on actual totals for 1942-43, and minus the April exports to the United States in the current crop year.

Canadian Wheat Supplies

	1943-44 - bushel	1942-43 ls -
Carry-over in North America July 31	594,477,184 <u>1/</u> 293,660,000 <u>2/</u>	423,752,337 556,684,000 <u>1</u> /
Total Supply	888,137,184	980,436,337
Estimated domestic requirements	175,000,000 2/	171,258,000 1/
Available for export or carry-over	713,137,184	809,178,337
Deduct		De paten o
Exports of wheat as grain August-April Flour exports in terms of wheat August-April	177,033,696 <u>3/</u> 43,010,811	98,974,694 40,531,569
Total Exports Wheat and Flour	220,044,507	139,506,263
Balance on May 1 for export or carry-over	493,092,677	669,672,074

1/ Revised. 2/ Subject to revision. 3/ Excludes April exports to U.S.A.

An upward revision of domestic requirements for the 1943-44 season may be found necessary, but this will depend largely on the movement of western wheat to the eastern provinces and British Columbia for live stock feeding, and the accuracy of the estimate made for feeding of wheat in western Canada during the last quarter of the current season.

II. EXPORTS OF WHEAT AND FLOUR

Export returns complete to the end of March 1944, show that almost 205,000,000 bushels of Canadian wheat in the form of grain or flour went overseas and to the United States during the first eight months of the crop year 1943-44 compared with 116,000,000 bushels in the corresponding period last season, an increase of 89,000,000 bushels.

All of this increase can be attributed to exports to the United States and if the current rate of monthly exports continues for the balance of the season, the total for the crop year will exceed 300,000,000 bushels and will be the largest export movement in a single season since the crop year 1928-29.

The monthly rate of exports so far this season has been close to 26,000,000 bushels, but February was the peak month with more than 31,000,000 bushels, a total which has not been equalled since May 1941. It is noteworthy that since March 1943 monthly exports of wheat and flour have never been below 21,000,000 bushels, while the total exported during the fiscal year 1943-44, which ended March 31 this year was 303,300,199 bushels.

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

1943-44	1942-43 1	1941-42 1	1940-41	1939-40
		- bushels -		
August 27,579,135	15,546,739	20,391,405	11,560,065	13,198,877
September	9,827,484	15,556,038	9,622,992	14,688,827
October 23,292,524	14,169,255	14,314,814	10,810,971	9,220,393
November 22,241,524	15,637,315	17,752,672	13,705,174	18,826,047
December 24,268,944	8,389,775	20,259,936	8,953,630	15,480,129
January 28,454,255	13,878,802	18,166,222	15,220,986	20,148,824
ehruary	15,650,208	15,610,033	18,110,049	16,556,686
March 26,025,015	23,128,154	20,046,761	21,497,072	21,268,085
lpril	23,278,531	29,696,162	30,757,859	16,831,280
lay	26,180,186	23,705,259	36,815,411	22,366,323
Sune	27,190,819	17,054,252	31,084,121	12,042,247
ruly	21,823,634	13,274,880	23,067,916	12,046,650
Crop Year Totals	214,700,902	225,828,434	231,206,246	192,674,368
Total for 8 Months August - March204,827,029	116,227,732	142,097,881	109,480,939	129,387,868
Months' exports as f of Crop Year Total	54.1	62.9	47.4	67.2

^{1/} Revised.

During the 41 weeks ended May 11, a total of 164,000,000 bushels of Canadian wheat was shipped to the United States. Part of this has been re-exported to countries overseas and nearly 19,000,000 bushels were still in store or in transit in the United States on May 11, but over 100,000,000 bushels of the total had disappeared in the United States in this period.

Rail shipments direct from western Canada were well maintained in the first two weeks of May but will taper off during the balance of the summer. The bulk of the movement will now be made by water from Fort William and Port Arthur as is evidenced by the fact that more than 26,000,000 bushels were shipped to United States lake ports during the first weeks of lake navigation, from April 8 to May 14, 1944.

A summary of the total movement by rail and vessel, by areas in which shipments originated, is given below. This table covers the period August 1, 1943 to May 11, 1944, inclusive.

	Rushels
Shipments from -	
Fort William-Port Arthur	96,991,955
Eastern Elevators	19,572,572
Pacific Coast Elevators	15,525,334
Western Country Points	31,955,827
Total	164,045,688

These figures reveal that in the four weeks ended May 11, more than 9,000,000 bushels of wheat moved by rail direct from country points in western Canada, while the shipments from Fort William-Port Arthur, all made by vessel, totalled almost 20,000,000 bushels in the same four-week period. The shipments from Pacific coast points and from eastern elevators were relatively small.

Vessel shipments to United States lake ports during the first two weeks of May fell away sharply from the large totals reached in the last three weeks in April. Between May 1 and 14, only 806,580 bushels of Canadian wheat were shipped from the lakehead ports to Buffalo compared with nearly 19,000,000 bushels in the three preceding weeks, while shipments to other U.S. lake ports totalled 717,166 bushels in the first half of May compared with 5,504,000 bushels between April 8 and 30.

Most of the tonnage moving down the lakes from Fort William-Port Arthur in the first half of May was destined for Canadian ports and more than half the whoat shipped between the opening of navigation and May 14 went to lower lake ports on the Canadian side.

More than 73 per cent of the wheat shipped to the United States this season has been No. 3 Northern or higher. About 22,000,000 bushels graded No. 1 Hard and No. 1 Northern, 54,000,000 bushels No. 2 Northern, and 44,000,000 bushels No. 3 Northern. Durum wheat shipments totalled about 2,500,000 bushels, while all other grades ran up a total of more than 41,000,000 bushels.

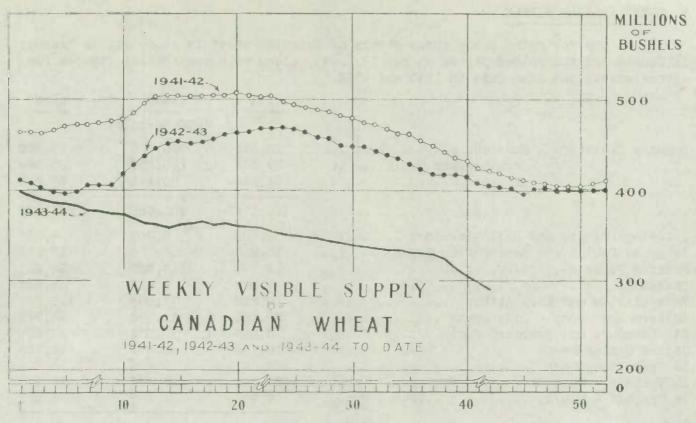
Buffalo received 59,000,000 bushels of the inward shipments by water from Canada, while Duluth-Superior came next with 16,000,000 bushels, and Pacific coast ports third with 15,000,000 bushels. The balance was distributed to half a dozen other ports with Krie and Chicago on top of the list. A little wheat went to Milwaukee and some to Oswego and Ogdensburg.

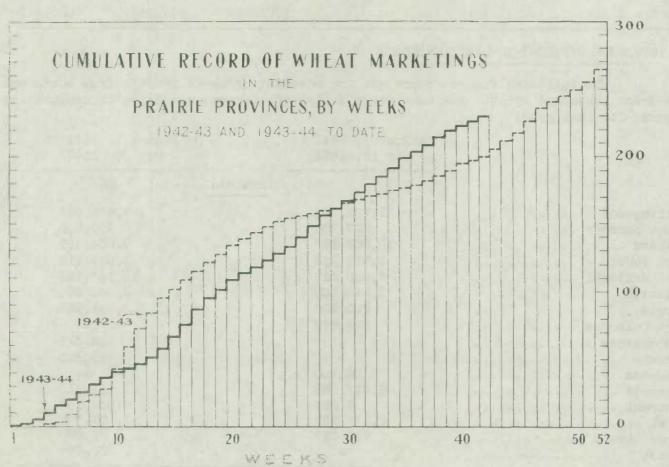
IV. FARMERS' MARKETINGS

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

Week endi	ng	Manitoba	Saskatchewan	Alberta	Totals	Last Year
				- bushels -		
August	1-5	57,657	279,815	246,948	584,420	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	1,610,296
September	9 16	1,200,888 655,047 782,765	3,124,271 2,835,663 3,238,644	1,313,604 1,100,003 1,331,775	5,638,763 4,590,713 5,353,184	1,658,994 4,850,107 10,689,344
	23	1,092,348 671,910	3,635,247 3,036,891	1,427,618	6,155,213 4,948,728	4,202,525 3,432,189
October	7	514,543	2,375,620	1,103,026	3,993,189	15,611,559
	14	480,821	1,795,830	1,016,407	3,293,058	16,986,475
	21	525,806	1,880,566	810,824	3,217,196	13,004,282
	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	10,096,343	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	6,518,752
	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	4,085,365	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	4,794,451	4,610,670
	20	397,404	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	1,945,725
	10	314,902	4,812,838	2,780,827	7,908,567	2,755,628
	17	196,802	2,743,687	2,037,972	4,978,461	1,421,710
	24	246,938	3,141,922	2,086,798	5,475,658	3,114,271
March	2	369,573	3,983,652	1,933,446	6,286,671	2,768,637
	9	395,684	3,686,144	1,409,671	5,491,499	2,120,056
	16	488,031	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	2,386,592	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 <u>1</u> /	402,111	3,603,872	2,040,441	6,046,424	4,257,687
	27	339,586	3,764,267	1,525,816	5,629,669	4,573,342
May	4 11 18	225,463 273,055 276,040	2,240,247 1,368,491 1,345,203	1,434,844 1,129,066 893,449	3,900,554 2,770,612 2,514,692	3,906,273 3,133,050 4,355,517
Total		30,864,809	133,752,361	64,549,629	229,166,799	201,607,018

^{1/} Revised





V. WHEAT VISIBLE SUPPLY

The following table shows stocks of Canadian wheat in store and in transit in Canada and the United States on May 18, 1944, along with comparative figures for approximately the same date in 1943 and 1942:

	1944	1943 000 bushels)	1942
Country Elevators - Manitoba	18,235 79,545 62,390	30,285 115,255 76,145	21,280 83,880 57,390
Total	160,170	221,685	162,550
Interior Private and Mill Elevators Interior Public and Semi-Public Terminals Pacific Ports Churchill Fort William and Port Arthur Eastern Elevators - Lake Ports United States Ports In Transit - Lakes In Transit - Rail	5,789 10,817 14,996 1,878 18,359 25,101 8,553 10,150 2,4,882 21,594 8,901	5,759 16,130 19,457 2,617 76,006 21,978 10,538 8,671 3,726 13,877 3,793	6,331 17,010 20,221 2,617 116,547 36,773 17,360 15,728 2,548 19,133 3,881
Total	290,590	404,237	420,693

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 May 18, 1944	August 1, 1942 to May 20, 1943
		bushels
Collingwood,.,,,,,,,	1,729,203	2,646,067
Depot Harbour	255,700	400,500
Midland	10,062,107	9,554,457
Owen Sound	2,025,753	3,039,113
Port McNicoll	7,068,029	10,247,566
Goderich	1,360,001	2,960,390
Sarnia	720,700	2,648,485
Port Colborne	326,820	
Humberstone		128,326
Toronto		988, 625
Kingston	14,700	
Prescott	1,257,168	1,134,612
Montreal	3,097	8,614,156
Sorel	1,877,969	2,178,305
Three Rivers	701,037	95,000
Quebec		1,203,996
Total	27,402,284	45,839,598

VII FERIGHT ASSISTANCE SHIPMENTS

More than 20,000,000 bushels of western Canadian wheat have been distributed as animal feed in the five eastern provinces and in British Columbia, according to the record of claims paid under the Federal Freight Assistance Policy during the nine months ended April 30, 1944. This is an increase of about 7,000,000 bushels over the August-April payments in the crop year 1942-43. The returns for April this year are only partial and will be revised upward.

Ontario continues to claim about half the shipments with Quebec and British Columbia in second and third place respectively. About 2,000,000 bushels have gone to the three Maritime Provinces and in each province the amount taken this crop year is ahead of the 1942-43 totals.

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
				bushels -			
August	1,566,247	651,407	69,617	105,732	67,497	390,307	2,850,807
September	1,793,226	964,788	81,120	84,085	50,398	339,623	3,313,240
October	1,157,219	966,097	92,463	174,500	58,108	271,108	2,719,495
November,	1,192,980	1,051,913	133,482	174,545	38,242	361,477	2,952,639
December	1,250,730	759,323	107,418	162,745	80,767	275,740	2,636,723
January	1,212,638	761,787	70,055	163,470	63,351	298,273	2,569,574
February	787,597	419,618	34,617	63,252	33,668	253,615	1.592.367
March sesses	954,173	447,550	37,323	65,328	20,157	95,058	1,619,589
April	67,782	18,650	317	325	100	2,991	90,165
Total	9,982,592	6,041,133	626,412	993,982	412,288	2,288,192	20,344,599
Same Period		Selection is		120111111111111111111111111111111111111			
1932-43	5,620,394	4,579,488	511,843	667,589	288,566	1,590,000	13,257,880

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 April 30, 1944	August 1, 1943 to April 30, 1944
	- tons	
Ontario ,	489,796	162,338
Quebec	723,269	189,486
New Brunswick	109,385	33,261
Nova Scotia	119,906	37,119
Prince Edward Island	28,461	10,395
Total	1,470,817	432,599

VIII. RAID SHIPMENTS TROM FORT WILLIAM-PORT ARTHUR

April movement of wheat by rail from Fort William and Port Arthur dwindled to 107,257 bushels compared with over 1,000,000 bushels in March and over 4,000,000 bushels each in the months of January and February. The resumption of lake navigation accounted for the falling off in shipments by rail and for the balance of the season wheat movement in railway cars to eastern Canada is expected to be light. Shipments by months are set out below:

	1943-44	1942-43	1941-42
	bu.	bu.	bu.
August	990,879	390,264	90,122
September	1,547,042	600,921	143,816
October	780,035	644,926	209.376
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
Maria Maria			
Total (9 months)	14,872,634	17,677,194	8,068,924

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

	Ontario	Quebec	New Brunswick	Nova Scotia	Prince Edward Island
			- bushe	ls -	
2 Northern	27,114				
3 Northern	34	-		9,333	-
4 Northern	6,300	1,500			-
No. 5	2,626	21,133	- 4	1,000	3,000
No. 6	3,350	-	15,000	-	-
Feed	_	1,500	-	-	-
Rej. 1 Nor. Mxd. Htd	-	3,000	-	-	-
Rej. 2 Nor. Mxd. Htd	6,300	1,500	-	-	-
Tf. Sple. Htd	1,567	-	-	-	
2 C.W.A.D	3,000	-			-
Total	50,291	28,633	15,000	10,333	3,000

GRAND TOTAL ..., 107,257

IX PARTICIPATION FAYNOWES ON 1940 MEAT

Payments on wheat delivered to the Canadian Wheat Board from the 1940 wheat crop are now being made to the holders of participation certificates and the following amounts will be paid on each of the grades set out below:

Grade po	Cents er bushel	Grade	Cents per bushel
			por odonor
1 Hard		Rej. 5 Wheat Mixed Heated	16.590
1 Northern		Rej. 1 Northern Sprouted	7.278
2 Northern		Rej. 2 Northern Sprouted	8.144
3 Northern	8.146	Rej. 3 Northern Sprouted	8.950
4 Northern	11.471	Rej. 4 Northern Sprouted	13.616
5 Wheat	13.608	Rej. 5 Wheat Sprouted	
6 Wheat	18.318	Smutty Rej. 1 Northern	
Feed Wheat	20.599	Smutty Rej. 2 Northern	
Tough 1 Northern	7.360	Smutty Rej. 3 Northern	
Tough 2 Northern	7.296	4 Special	
Tough 3 Northern	8.427	5 Special	
Tough 4 Northern	11.834	6 Special	21.465
Tough 5 Wheat	14.098	Smutty 4 Special	15.215
Tough 6 Wheat	17.457	1 C.W. Garnet	10.835
Tough Feed Wheat	18.840	2 C.W. Garnet	12.752
Smutty 1 Northern	7.004	3 C.W. Garnet	13.455
Smutty 2 Northern	8.061	Tough 1 Garnet	10.465
Smutty 3 Northern	9.287	Tough 2 Garnet	12.712
Smutty 4 Northern	12.018	Tough 3 Garnet	14.049
Smutty 5 Wheat	13.090	Smutty 2 Garnet	13.846
Rejected 1 Northern	8.561	Smutty 3 Garnet	13.590
Rejected 2 Northern	9.726	Rejected 2 Garnet	14.090
Rejected 3 Northern	11.307	Rejected 3 Garnet	17.715
Rejected 4 Northern	11.241	Tough Rejected 2 Garnet	12.669
Rejected 5 Wheat	13.590	Damp 2 Garnet	9.840
Tough Smutty 1 Northern	7.090	Damp 3 Garnet	11.215
Tough Smutty 2 Northern	7.369	1 Amber Durum	9.401
Tough Smutty 3 Northern	8.721	2 Amber Durum	11.022
Tough Smutty 4 Northern	10.715	3 Amber Durum	12.832
Tough Rejected 2 Northern	8.053	4 Amber Durum	14.470
Tough Rejected 3 Northern	10.284	5 Amber Durum	13.417
Tough Rejected 4 Northern	14.590	6 Amber Durum	13.715
Tough Smutty Rej. 4 Northern	11.090	Tough 2 Amber Durum	
Damp 1 Northern	7.143	Tough 3 Amber Durum	13.715
Damp 2 Northern	6.670	Tough 4 Amber Durum	
Damp 3 Northern	5.519	Smutty 1 Amber Durum	
Damp 4 Northern	8.406	Smutty 2 Amber Durum	
Damp 5 Wheat	11.215	Smutty 3 Amber Durum	
Damp Feed Wheat	15.715	Rejected 1 Amber Durum	
Damp Smutty 2 Northern	5.965	Rejected 2 Amber Durum	
Damp Smutty 3 Northern		Rejected 3 Amber Durum	
Damp Rejected 3 Northern	8.970	Rej. 2 Amber Durum Sprouted	
Rejected 1 Nor. Mixed Heated		Rej. 3 Amber Durum Sprouted	
Rejected 2 Nor. Mixed Heated		Rej. 4 Amber Durum Sprouted	
Rejected 3 Nor. Mixed Heated		Smutty Rej. 2 Amber Durum	
Rejected 4 Nor. Mixed Heated	13.840	l Mixed Wheat	10.000

Grada

Cents per bushel

Crade

Cents per bushel

2 Mixed Wheat	10.090	Tough Rej. 1 Nor. Mixed Heated	10.340
		Tough Rej. 2 Nor. Mixed Heated	
5 Mixed Wheat	16.689	Tough Rej. 3 Nor. Mixed Heated	
Rejected 3 Mixed Wheat	11.090	Tough Rej. 3 Nor. Mixed Heated	
Rej. 1 Mixed Wheat Sprouted	12.340	and Heating	11.965
1 Mixed Grain	26.640	Tough Rej. 2 Northern Sprouted	8.233
Smutty 2 White Spring	6.965	Tough Rej. 3 Northern Sprouted	10.340
1 Alberta Red Winter	8.991	Tough Rej. 4 Northern Sprouted	12.090
2 Alberta Winter	8.601	Tough Rej. 3 Garnet Sprouted	14.590
3 Alberta Winter	8.868	Rej. 3 Mixed Wheat Ragweed	11.090
Tough 2 Alberta Winter	9.840	Rej. 1 Nor. Melilot Odor	9.278
Tough 3 Alberta Winter	10.215	Rej. 2 Nor. Melilot Odor	9.818
Smutty 1 Alberta Red Winter	9.191	Rej. 3 Nor. Melilot Odor	9.215
Smutty 2 Alberta Winter	10.470	Damp Rej. 2 Nor. Sprouted	5.965
Smutty 3 Alberta Winter	8.963	Damp Rej. 3 Nor. Sprouted	6.965
Rejected 2 Alberta Winter	13.215	Tough Rej. 3 Alberta Winter	
Rejected 3 Alberta Winter	13,215	Sprouted	13.215
Rej. 2 Alberta Winter Sprouted	11.465	Rejected 2 Amber Durum	
Sample Durum and Broken Wheat	19.215	Melilot Odor	10.965
Rej. Sprouted 3 Nor. Rej.		Rej. 1 Nor. Mixed Weed Stains	8.215
Mixed Rotten Kernels	9.090	Sample Spring and Broken Wheat	16.942
Tough Smutty Rej. 1 A.R.W.		Sample Heated	15.250
Mixed Heated	13.840	Sample Amber Durum Heated	20.215

Producers in western Canada delivered a total of 456,660,058 bushels of wheat during the crop year 1940-41 but the Canadian Wheat Board took delivery of only 395,357,-243 bushels of the total marketed. Deliveries to the Board by provinces were as follows:

	Bushels
Manitoba	44,494,757
Saskatchewan	203,608,448
Alberta	147,254,038
Total	395,357,243

The initial price paid on the 1940 wheat crop was 70 cents per bushel for No. 1 Northern, basis in store Fort William-Port Arthur or Vancouver. Spreads were established for lower and off-grades and a price of 44 cents per bushel was paid for Feed wheat. The open market price averaged 74 cents per bushel for No. 1 Northern and 59 1/2 cents for Feed wheat during the crop year 1940-41.

It should be noted that in addition to the initial price paid by the Canadian Wheat Board for 1940 wheat, provision was made for the payment of farm storage at the rate of 1/45th of a cent per bushel per day. These storage payments commenced on October 8, 1940, and applied to all wheat delivered to the Board between November 1, 1940 and July 31, 1941.

The total amount of money paid out by the Board on farm storage during the crop year 1940-41 was \$6,147,524.