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AGRICULTURAL BRANCH

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

# MONTHLY REVIEW OF THE WHEAT SITUATION

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AGRICULTURAL BRANCH

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WORLD WHEAT SITUATION - SUMMARY

North America

It is, of course, much too early to attach too much importance to the prospective supply and disappearance picture for wheat in North America in 1945. At this time a year ago both Canada and the United States were digging into substantial stockpiles remaining from the big 1942 crops as disappearance into domestic feed channels continued at unprecedented levels. Crop prospects, on the other hand, were none too bright. Soil moisture reserves in the Prairie Provinces were exceptionally low and although plantings of winter wheat in the United States were up by 25 per cent to 47 million acres, fall precipitation was far below normal. At the same time, the Canadian Agricultural program contained a recommendation to farmers to hold their wheat acreage to 17.5 million acres.

The rest is now a matter of record. Canadian farmers planted over 23 million acres of wheat and by virtue of heavy rainfall in the late spring and summer harvested some 436 million bushels. The United States garnered a record wheat crop of 1,079 million bushels. These very favourable crops permitted the combined available supply of wheat in the two countries in 1944-45 to decline by only 150 million bushels as compared with 1943-44.

Although anything can happen yet, conditions are favourable for the maintenance of this level of wheat supplies in North America in 1945-46. Nearly 50 million acres have been seeded to winter wheat in the United States and conditions prevailing up to December 1 indicated a winter wheat crop of about 762 million bushels. Should a crop of this size be harvested and average yields realized on the probable spring wheat acreage, production will again exceed a billion bushels. Since Canada's wheat is predominantly spring there are fewer indications available as to probable acreage and production. Fall precipitation was below average in Saskatchewan and Alberta but considerably above that of a year ago. The acreage recommended for wheat in Canada's 1945 Agricultural Program is placed at 21.5 million acres. With the present price and marketing structure, however, some quarters of the trade expect the recommended acreage to be overplanted.

Estimates of domestic disappearance on the North American continent are also below those of a year ago with expected utilization in the United States down by about 320 million bushels and in Canada by 20 million bushels. Total exports from the two countries are still uncertain but indications at this time are that they will probably not exceed 100 million bushels from the United States and 340 million from Canada. The combined carry-overs of the two countries at the end of the crop year will, therefore, likely be close to 700 million bushels as compared with 670 million last summer.

Southern Hemisphere

The latest estimate received by the Bureau of available supplies in Argentina for the new crop year now includes a carry-over of old wheat at December 1, 1944 of only 61 million bushels. Although the supply data in Argentina are usually compiled in such a way as to exclude grain which is on hand, but which has been set aside for various purposes or sold to importers, this estimate of carry-over at December 1 appears far too low. On November 15 the Ministry of Agriculture placed the unreserved and unsold wheat supplies at 156 million bushels. There were, in addition, some 30 million bushels on hand which had been sold to Spain plus whatever fuel reserves had not been used.



Lacking confirmation of this revised supply picture which has been published elsewhere in this Review we must conclude that total stocks of old wheat at December 1 in Argentina amount to at least 180 million bushels. The new crop is still officially estimated at 166.7 million bushels with the trade suggesting a higher figure.

Australia is making an effort to stretch her crop year supplies of 125 million bushels as far as possible. The sale of wheat for feed is being limited to the average sales for this purpose made by the Wheat Board during the nine-month period ending September 30, 1944. It is hoped that this restriction, coupled with a break in the drought, will limit the use of wheat for feed during the present crop year to 43 million bushels. Wheat for stock feed has recently been passing out at a rate in excess of one million bushels per week.

The Australian Government has limited its wheat acreage during the war owing to the loss of export markets which loss, in turn, is attributable to the long ocean haul to the United Kingdom and the shortage of shipping space. The Wheat Industry Stabilisation Plan has been in operation during the past four crop years. Under this plan an acreage allotment is made to each grower according to the average which he seeded during a basic four-year period. In 1943-44 farmers received 4/ 1 1/3d (\$1.20 Canadian) net (growers' siding, for bagged wheat and 3/ 11 1/3d (\$1.00 Canadian) net for bulk wheat on the first 3,000 bushels delivered. The payment for excess quota wheat depends on the price for which the Government is able to dispose of it. Although it is expected that this plan will be modified in 1945-46 to permit of an increase in seeded acreage, no announcement has, as yet, been made.

#### World Production

The United States Department of Agriculture has compiled estimates on the world production of wheat during the war period. Their survey indicates a total production of 3,848 million bushels in 1944 as compared with 3,749 million in 1943 and 4,032 million bushels in 1939. This represents approximately 97 per cent of total world production exclusive of the U.S.S.R. and China. Over the six-year period, production in the United States has exhibited a steady expansion from 741 million bushels in 1939 to 1,079 in 1944. The production in 30 European countries is remarkably constant in the light of war conditions; in 1939 it is placed at 1,095 million bushels, in 1944 at 1,460 million bushels. The output of wheat in North Africa has suffered the largest relative decrease over the period, amounting to 151 million bushels in 1939 and to only 85 million in 1945. The large decrease in the Southern Hemisphere wheat crops in 1944 has been offset by the large crops in Canada and the United States.

#### European Situation

Reports on the condition of the wheat crop in the United Kingdom are increasingly pessimistic as extremely cold weather may have damaged the late-sown crop. A considerable proportion of the crop was seeded late because of continued wet weather. The Ministry of Agriculture, moreover, has not emphasized the necessity for a full acreage in wheat this fall as it did in previous war years. It is unlikely that the deficiency in fall seedings will be made up in the spring since the yields of wheat seeded in the spring do not come up to that seeded during the autumn months.

A good snow cover on the continent is credited with protecting wheat from the extremely cold weather which has prevailed. The unfavourable planting season is credited with reducing seedings to a point well below normal. Conditions in the important wheat areas of Roumania and Hungary are reported favourable, but here, too, the acreage is said to be below official expectations.

(January 30, 1945)

# THIRD ESTIMATE CANADA'S 1944 WHEAT CROP

Canada's 1944 wheat harvest is now placed at 435,535,000 bushels, valued at \$460,052,000 or an average farm price of \$1.06 per bushel in the third estimate of production issued on January 22. This compares with the final estimate of 284,460,000 bushels for the 1943 crop which was valued at an average farm price of \$1.01 per bushel and a total gross farm value of \$288,511,000.

Wheat production in the Prairie Provinces in 1944 is now estimated at 410.6 million bushels and at 267.8 million for 1943. The second estimate of 428.3 million bushels for the 1944 crop was reduced to 410.6 million bushels in the light of final yield reports and disposition data available for the first five months of the crop year.

The first three estimates of the 1944 wheat crop in the Prairie Provinces and the final estimate of the 1943 crop are as follows:

	1944 Crop			1943 Crop
	1st Estimate	2nd Estimate	3rd Estimate	Final Estimate
	- bushels -			
Manitoba .....	54,000,000	54,900,000	54,900,000	39,000,000
Saskatchewan .....	253,500,000	260,000,000	250,000,000	146,000,000
Alberta .....	115,500,000	113,400,000	105,700,000	82,800,000
T o t a l .....	423,000,000	428,300,000	410,600,000	267,800,000

## 1943 WHEAT CROP IN THE PRAIRIE PROVINCES

The third estimate of the 1943 wheat crop which was made in January of 1944 has been scaled down from 277 million bushels to the present and final estimate of 267.8 million bushels. This revision has been made in the light of the following data on the disposition of this crop.

	Manitoba	Saskatchewan	Alberta	Prairie Provinces
	- thousand bushel -			
Carry-over on farms, July 31, 1943 ..	15,000	110,000	62,000	187,000
Final estimate of 1943 crop .....	39,000	146,000	82,800	267,800
Total on farms .....	54,000	256,000	144,800	454,800
Disposition:	613	194,380	508	326,511
Deliveries .....	40,595	192,937	91,465	324,997
Seed .....	3,688	16,100	8,625	28,413
Feed .....	6,000	20,000	20,500	46,500
Custom Millings .....	717	1,084	582	2,383
Carry-over on farms, July 31, 1944 .	3,000	26,200	23,650	52,850
Total Disposition .....	54,000	256,321	144,222	454,543
	228	257,744	865	456,657

The estimated acreage seeded to wheat in Saskatchewan in 1943 has been reduced to 9.6 million acres as compared with the first estimate of 10.3 million acres. This revision of acreage is largely responsible for the reduction from the third estimate of production.



# CHICAGO WHEAT FUTURES

During the early part of January wheat futures displayed considerable strength. This was attributed by the trade to a number of factors including sizeable government flour purchases, the possible revision of the parity formula in such a way as to raise parity prices, and absence of pressure on cash wheat. The increase in flour subsidy rates was the immediate cause of the increase in the flour business.

Later in the month traders were inclined to sell more freely as Allied victories strengthened the impression that the European war may be drawing to a close. The large stocks of wheat on farms also exerted a bearish influence as wheat futures closed by as much as 9 cents off recent highs.

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

<u>1944-1945</u>	<u>May</u>	<u>July</u>	<u>September</u>	<u>December</u>
(cents and eights per bushel)				
December 22	163/6	154/4	153/2	-
23	163/1	154/4	153/3	-
25		Christmas Day		
26		Boxing Day		
27	164/2	155/3	154/2	-
28	164	154/6	153/6	-
29	163/3	154/5	153/4	-
30	165	156	154/5	-
January 1		New Year's Day		
2	166	158	156/7	-
3	166/4	159/3	158/4	-
4	166/3	158/7	158	-
5	166/1	158/5	157/6	157/4
6	166	158/7	158/2	157/8
8	166/6	159/6	159/1	158/4
9	165/1	158/3	157/4	157
10	164/2	157/5	157/1	156/6
11	164	156/7	156/1	155/6
12	164/1	156/6	156/2	156
13	164/3	156/5	155/7	156
15	163	155/1	154/4	154/6
16	162/7	155/2	154/6	155
17	161/6	154/2	153/6	153/6
18	162	154	153/1	153/1
19	162/1	153/7	152/6	153
20	161/2	152/6	151/5	151/6
22	161/2	153	152/1	152/1
23	160	150/7	149/5	149/7
24	159/7	151/1	150	150/1
25	160	151/7	151	151/4
26	161/6	153/4	152/3	152/8
27	160/2	151/5	150/7	151/4

CENTS  
PER  
BUSHEL

150

140

130

120

110

100

90

80

70

JAN.

FEB.

MAR.

APR.

MAY

JUNE

JULY

AUG.

SEPT.

OCT.

NOV.

DEC.

JAN.

*No. 1 Man. St. John*

*Australian*

*New Crop*

*Argentine Rosafé*

## SHIPPERS OFFERS TO THE UNITED KINGDOM

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

Jan. 1944 to date

(Canadian cents per bushel)

## CALENDAR OF WHEAT EVENTS

- January 2 Lack of sufficient rain in Argentina is threatening the corn crop which will be harvested in April.
- 3 Wheat marketings by Canadian farmers during the current crop year are nearly double those of a year ago.
- 4 The wheat crop in South Africa is estimated at about 15 million bushels which is equal to the 1939-42 average.
- 5 Spain continues to take one and sometimes two cargoes of wheat from Argentina each week.
- 6 The American War Food Administration has announced the suspension of the export subsidy on wheat.
- 8 The rate of subsidy on wheat ground for flour in the United States has been raised from 19 to 23 cents a bushel everywhere except in the Pacific area where it is 27 cents.
- 9 The minimum flour extraction rate in the United Kingdom has been lowered a further 2 1/2 per cent to 80 per cent.
- 10 The action of the Argentine Government in taking over the electric power industry emphasizes that country's shortage of fuel and the probable extensive use of grain for that purpose.
- 11 Stocks of Canadian wheat at the Lakehead have been accumulating rapidly since the close of navigation.
- 12 The harvesting of wheat in Australia will be completed this month.
- 13 The carry-over of wheat in the United States at July 1, 1945 is expected to be about 400 million bushels.
- 15 The War Food Administration in the United States has authorized a payment of \$5.00 per acre on approved acreage sown to flaxseed in 1945.
- 16 The production of wheat flour in Canadian mills during the month of November was the largest for any month since October of 1925.
- 17 Canadian millers have been forced to refuse some export inquiries for winter wheat flour owing to their inability to secure sufficient winter wheat.
- 18 Reports continue to indicate that the acreage seeded to wheat in the Balkans has fallen short of official goals.
- 19 Favourable war and crop condition reports have caused weakness on the Chicago wheat futures market.
- 20 In an effort to make available wheat supplies go as far as possible the Australian Government has limited the use of wheat for stock feed.
- 22 A million bushels of Australian wheat, delayed by shipping difficulties, is stored on the ground in California pending its sale for feed.
- 23 The Canadian Federation of Agriculture has asked that the Canadian Wheat Board be continued as the sole marketing agency for wheat.



## UNITED STATES

The supply and probable disposition picture for the United States for the crop year 1944-45 as compared with 1943-44 is now as follows: 1/

	1943-44	1944-45
	(million bushels)	
Carry-over July 1 .....	622	315
New crop .....	836	1,079
Net imports .....	90	- 65 2/
Total Supply .....	1,548	1,329
Domestic Disposition		
Food .....	543	535
Seed .....	79	80
Feed .....	503	230
Alcohol .....	108	70
Total .....	1,233	915
Carry-over July 1 .....	315	414

1/ Source: Wheat Situation, November-December 1944.

2/ Net exports with total exports of 100 million bushels and imports of 35 million bushels expected.

Should the above estimates of domestic disposition and net exports for 1944-45 prove approximately correct, the carry-over of wheat in the United States at July 1, 1945 will be about 414 million bushels or a 100 million bushels greater than the preceding year's carry-over. This increased year-end stockpile is made possible through the combination of a record crop and reduced domestic requirements. The large corn and sorghum crops harvested this year have reduced the quantity of wheat needed for feed and alcohol.

Exports are, of course, still uncertain. On November 11 the War Food Administration announced an export subsidy program designed "to make United States wheat and flour available to foreign buyers on a price basis comparable with that at which other exporting countries are making these products available in world markets". On January 4 this export subsidy on wheat was temporarily suspended. At the same time the War Food Administration broadened the subsidized flour export area to include any country, subject to the export requirements of the Foreign Economic Administration. Previously, subsidized flour exports had been limited to countries in the western hemisphere. The rate of subsidy for wheat exported in the form of flour remains at 34 cents, 29 cents and 6 cents for shipments from Gulf ports, Pacific Coast ports and by rail respectively.

Sales under the Wheat Export Program were small, amounting to less than a quarter of a million bushels, and consigned to Columbia, Cuba and Central America. The subsidized export of flour has been larger, totalling over 6 million bushels, wheat equivalent to January 19 with about 75 per cent of total exports consigned to Cuba.

The indicated winter wheat crop, based upon conditions prevailing up to December 1, is 762 million bushels. This estimate can, of course, be greatly affected by weather conditions during the spring and summer. Should conditions remain favourable, however, and average yields be realized on the spring wheat acreage which may be seeded, another billion bushel wheat crop would be harvested in 1945. The Bureau of Agricultural Economics foresees a minimum carry-over of 500 million bushels at June 30, 1946 should a crop of this size materialize. The average carry-over during the 10 year period 1932-41 was 235 million bushels.

Through January 13 the Commodity Credit Corporation had completed loans on 179 million bushels of 1944 wheat at an average rate of \$1.375 per bushel. About 46 million bushels of this wheat is still stored on farms. Up to this time a year ago loans had been completed on 129 million bushels.

## ARGENTINE LETTER

The correspondent of the Dominion Bureau of Statistics in Buenos Aires has forwarded the following report under date of January 3, 1945.

### Crop Conditions

The customary official report on crop conditions has not yet been issued by the Ministry of Agriculture, but from reliable unofficial sources the following items of information on current conditions have been selected.

During December the weather conditions were generally favourable for the harvesting of fine grains and seed crops, and in the northern sections of the cereal zones the work has practically been finished. In the centre and south, however, there is considerable harvesting activity.

Planting of corn and sunflower seed has been concluded, and the crops are progressing well, although in the opinion of some good judges, the weather has been rather too bright for the maize, which requires more rain. Some reports of damage due to lack of rain have come in from the north, but this is by no means a general condition as yet.

The wheat crop generally has given results which are from fair to good, except in the far north, the far west, and the Pampa, where yields have proved very poor. Nevertheless, the official calculation is regarded as too low, and good judges expect a total of not less than 184 million bushels.

The linseed estimate also is regarded as too low, and some members of the grain trade would add 35 per cent to the official figure, but this difference is regarded as of little importance in view of the fact that exportation of linseed is not to be permitted. The official estimate of the new crops, with comparative figures is given in bushels:

	<u>Wheat</u>	<u>Linseed</u>	<u>Oats</u>	<u>Barley</u>	<u>Rye</u>
1944-45 .....	166,703,000	33,148,000	59,330,000	27,328,000	16,889,000
1943-44 .....	249,853,000	61,926,000	59,979,000	33,023,000	21,928,000
5-year average .....	230,710,000	57,635,000	42,731,000	26,226,000	11,496,000

### Supplies and Markets

Exports of wheat during the month of December totalled 6,051,000 bushels, of which 4,872,000 bushels were wheat in grain and 1,179,000 were flour in terms of grain. The comparable total in the preceding month was 9,099,000 bushels (revised). On the basis of the official first estimate of the new crop, (which is generally considered to be too low) the following is now the statistical position:

	<u>Bushels</u>
First official estimate 1944-45 crop .....	166,703,000
Carry-over from previous crops .....	60,700,000
Total Supplies .....	227,403,000
Shipments during December:	
Wheat .....	4,872,000 bushels
Wheat as flour .....	1,179,000 " 6,051,000
Supplies still available .....	221,352,000
Deductions and Reserves:	
Seed and domestic consumption .....	102,881,000 bushels
Fuel reserves .....	36,743,000 "
Unfit for milling .....	14,697,000 "
Social Service .....	5,511,000 "
Aid to War Victims .....	7,349,000 "
Contracted to Spain .....	23,883,000 " 191,064,000
Surplus in Excess of Deductions and Reserves .....	30,288,000



It is interesting to observe that on December 1, published figures showed that "commercial stocks" or "visible supplies" totalled 173,150,000 bushels of wheat.

During the month there was very little change in conditions in the market for wheat. The export business was very quiet, with only limited sales, these being largely for Brazil, with buyers for Spain also interested to a moderate extent.

The local millers were operating from time to time. They are permitted to purchase in the market at prices not lower than the official base of 9 pesos per 10 kilos, (about 81 cents Canadian per bushel) with a limit to the millers in quantity of 30 per cent of their registered output. The balance of their requirements must be bought from the official Regulating Board at a price of 8.60 per 100 kilos, (about 77 cents Canadian per bushel) and the Board may deliver either old or new grain at its option.

It was noteworthy that limited quantities of Candeal wheat were changing hands at a better price than the ordinary run of the grain, parcels of Superior Candeal commanding from 9 to 9.30 pesos per 100 kilos (81 cents to 84 cents) as the month closed.

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#### Official Purchasing of Grain

Some interesting information was revealed in the recently published Report of the Minister of Finance for the year 1943.

The Report says that during the five years which ended on December 31, 1943, some \$937,774,000 was invested in purchasing 46,670,000 tons of grain at various established prices. Of this some 41,180,000 tons were re-sold for \$649,963,000 which represented a loss of \$146,103,000. Of this \$131,664,000 was attributed to losses on maize, caused by deterioration, heavy storage expenses, and very low prices ultimately secured because the grain was principally used for fuel.

In addition there was a further outlay of \$33,337,000 in administrative expenses, interest and commissions, bringing the total loss so far to \$179,440,000.

At the close of December 1943 there remained on hand 5,490,000 tons of grain which cost \$141,709,000, of which about 60 per cent was old wheat of the 1942-43 crop.

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#### AUSTRALIAN CABLE

The following cable was received from the Canadian Government Trade Commissioner at Melbourne on January 17.

"Australian wheat stocks at December 31 totalled 99 million bushels. Harvesting has not yet been completed but the new crop estimate is still 50 million bushels. In order that wheat users may obtain their fair share of supplies the Commonwealth Government has instructed the Wheat Board to introduce a consumption quota scheme effective immediately. Under this scheme the maximum quantity of wheat to be made available for stock feed from January 15 to February 28, 1945 would be one-sixth of the total quantity sold by the Wheat Board in the nine months ended September 30, 1944. The quota for March will be announced later and it is hoped that with the help of a break in the season the total consumption of wheat for stock feed will be kept down to 43 million bushels for the year.

"The allocation of wheat to breakfast food manufacturers for the season will probably be 3,750,000 bushels compared with normal requirements of between 1 million and 2 million bushels. The increase is intended largely to meet service demands and to offset the decrease in breakfast foods which are derived from other grains in short supply. Flour mills in Victoria and New South Wales are still working only two shifts."



## SELLING PRICES OF CANADIAN WHEAT

Canadian wheat for export is being sold under a two-price policy. The Class 1 price applies to mutual aid countries and the Class 2 price to non-mutual aid countries. Wheat for domestic human consumption is sold to millers and processors at an average price of \$1.25 per bushel for No. 1 Northern, basis in store Fort William-Fort Arthur. However, the net price to processors is 77 3/8 cents since a drawback of 47 5/8 cents on No. 1 Northern is allowed to processors.

Class 1 wheat prices are the same as the initial price made to the farmer for carlots, basis in store Fort William, viz., \$1.25, \$1.22, \$1.20 and \$1.15 per bushel for Nos. 1, 2, 3 and 4 Northern respectively. The monthly average of Class 2 wheat prices, basis in store Fort William-Fort Arthur are as follows:

### Canadian Wheat Board Prices

	<u>1 Northern</u>	<u>2 Northern</u>	<u>3 Northern</u>	<u>4 Northern</u>
<u>1943</u>	(cents and eighths per bushel)			
October 19-30 .....	128/2	125/2	123/2	118/2
November .....	132/3	129/3	127/3	122/3
December .....	141/2	138/2	136/2	131/2
<u>1944</u>				
January .....	145/5	142/5	140/5	135/5
February .....	144/7	141/7	139/7	134/7
March .....	146/7	143/7	141/7	136/7
April .....	148	145	143	138
May .....	148	145	143	138
June .....	143/3	140/3	138/3	134/2
July .....	138	135	133	130
August .....	135/2	132/2	130/2	127/4
September .....	136	133	131	129/7
October .....	143/2	140/2	138/2	137/2
November .....	146/2	143/2	141/2	140/2
December .....	146/3	143/3	141/3	140/3
<u>1945</u>				
January 2 .....	147	144	142	141
3 .....	148	145	143	142
4 .....	148	145	143	142
5 .....	148	145	143	142
6 .....	148	145	143	142
8 .....	148	145	143	142
9 .....	147	144	142	141
10 .....	146	143	141	140
11 .....	146	143	141	140
12 .....	146	143	141	140
13 .....	146	143	141	140
15 .....	145	142	140	139
16 .....	145	142	140	139
17 .....	144	141	139	138
18 .....	144	141	139	138
19 .....	144	141	139	138

## CANADIAN SUPPLY POSITION

Canada's supply of wheat at January 1, available for export and/or carry-over at July 31, 1945, amounted to 511 million bushels as compared with 579 million bushels a year ago. The third estimate of the 1944 crop (see page 3) reduced the estimate of production by 17.7 million bushels.

Exports to the first of January compare very closely with exports during the first five months of the 1943-44 crop year. The distribution of these exports differs however. A year ago the United States was buying Canadian wheat in large volume for feeding purposes while this demand has now lessened. If total exports are this year to reach the 344 million bushel level attained in 1943-44 export clearances overseas will have to exceed those of last year by an amount equal to the decrease in imports into the United States.

So far clearances from Canadian Atlantic ports have been running far enough ahead of those of last year to maintain the 1943-44 level of exports. Since exports to the United States were heavier during the latter half of the 1943-44 crop year it will be more difficult to maintain the same rate during the latter half of this year. It would, therefore, appear that a total export movement of 344 million bushels should be regarded as a maximum for 1944-45.

### Canadian Wheat Supplies

	<u>1944-45</u>	<u>1943-44</u>
	- million bushels -	
Carry-over in North America July 31 .....	355.1	594.6
New Crop .....	435.5	284.5
Total Supply .....	790.6	879.1
Estimated domestic requirements .....	160.0	180.3
Available for export or carry-over .....	630.6	698.8
Deduct:		
Net Exports of wheat as grain August-December 31 1/ ..	95.9	98.3
Flour exports in terms of wheat August-December 31 ...	23.8	21.6
Total exports wheat and flour .....	119.7	119.9
Balance on January 1 for export or carry-over .....	510.9	578.9

1/ Customs exports plus or minus change in stocks of Canadian wheat in store in the United States.

# FARMERS' MARKETINGS IN THE PRAIRIE PROVINCES

Up to January 18 farmers had delivered 235 million bushels of wheat as compared with deliveries of 133 million bushels during the comparable period a year ago.

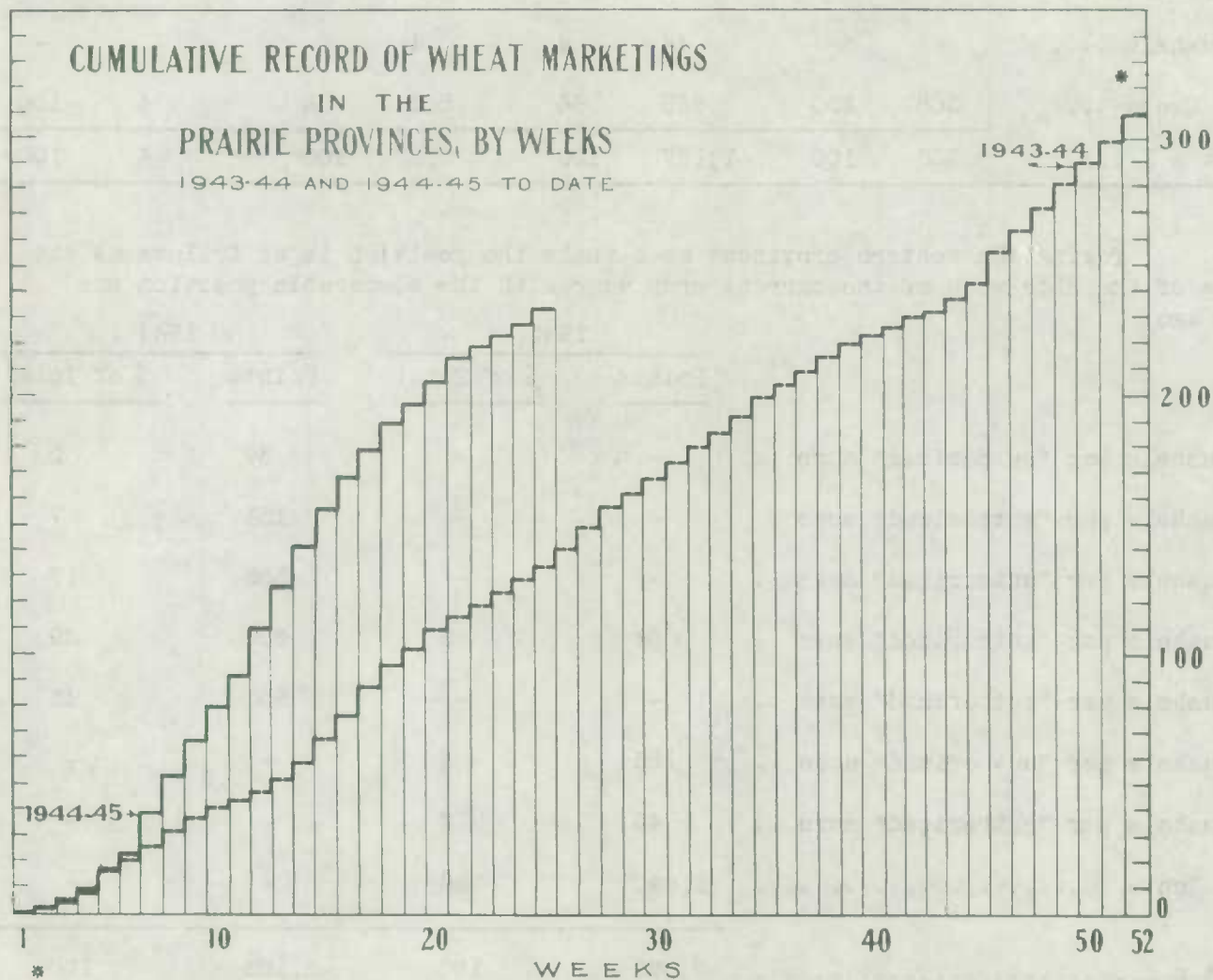
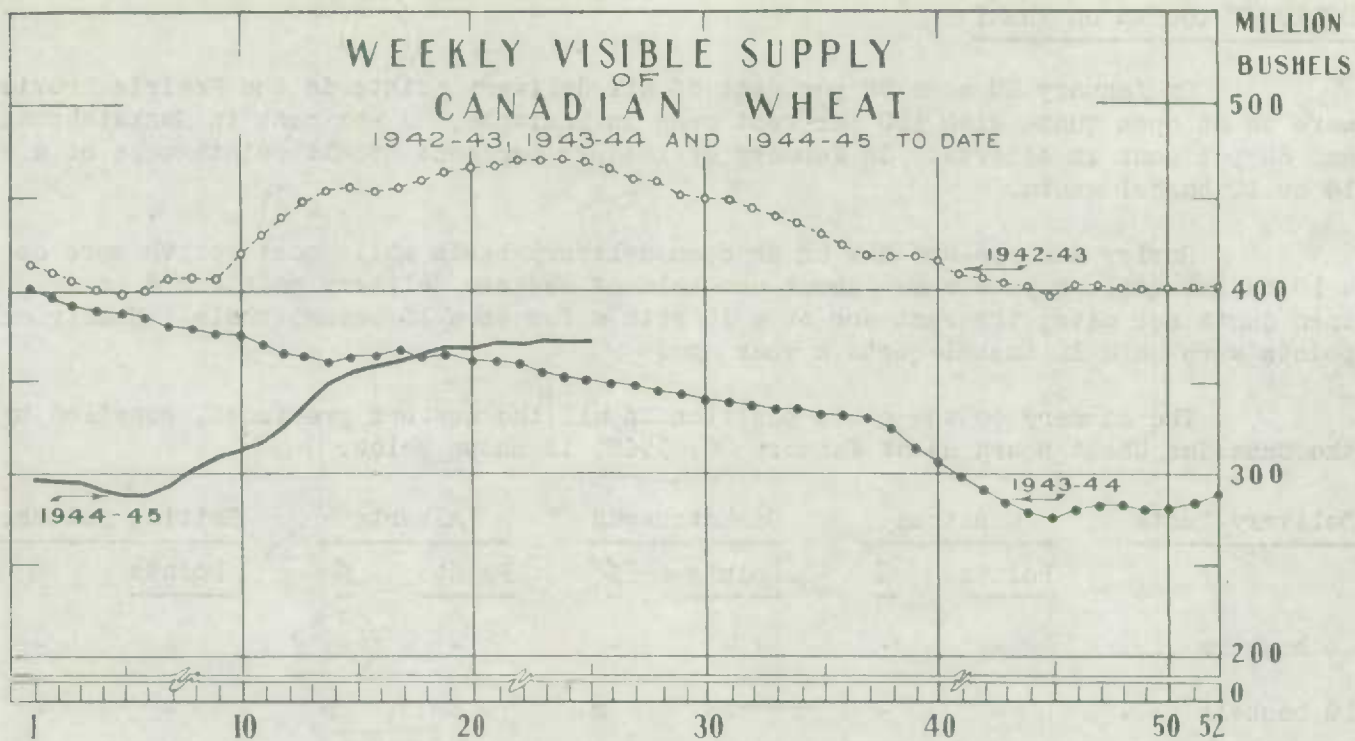
If the estimated farm disposition of 70 million bushels for feed, seed and custom millings is deducted from the total farm supply for the crop year of 463 million some 393 million bushels are left for marketing or carry-over. Deducting marketings to date of 235 million bushels, there remain on farms some 158 million bushels to be marketed between now and July 31 and/or carried over into the next crop year.

The following table shows primary receipts of wheat in the Prairie Provinces for the 1944-45 crop year along with comparative figures for 1943-44:

Week ending		Manitoba	Saskatchewan	Alberta	Totals	Last Year
		- bushels -				
August	1-3	555,480	415,651	496,881	1,468,012	584,420
	10	35,938	444,684	241,849	722,471	1,514,156
	17	92,087	1,051,440	752,355	1,895,882	3,413,073
	24	1,025,622	2,776,348	885,577	4,687,547	4,336,669
	31	2,296,542	3,955,228	1,077,113	7,328,883	5,638,763
September	7	492,048	5,399,007	1,580,961	7,472,016	4,590,713
	14	1,710,923	10,021,382	3,559,390	15,291,695	5,353,184
	21	931,482	10,255,922	3,357,451	14,544,855	6,155,213
	28	1,980,799	9,107,342	2,326,279	13,414,420	4,948,728
October	5	2,665,704	8,245,689	1,637,966	12,549,359	3,993,189
	12	2,137,984	7,313,697	2,682,451	12,134,132	3,293,058
	19	2,312,322	9,546,731	6,047,404	17,906,457	3,217,196
	26	2,783,438	9,228,347	5,100,705	17,112,490	4,019,942
November	2	2,567,150	9,715,890	3,600,876	15,883,916	6,568,395
	9	1,722,308	7,785,862	4,647,417	14,155,587	8,789,196
	16	968,593	8,412,483	2,902,779	12,283,855	10,096,343
	23	1,076,788	8,104,903	2,546,855	11,728,546	9,932,608
	30	973,232	6,963,478	1,812,345	9,749,055	8,915,870
December	7	759,840	4,748,635	1,622,464	7,130,939	6,376,427
	14 <sup>1/</sup>	952,838	5,877,287	1,988,001	8,818,126	6,744,684
	21	693,983	5,810,138	2,222,122	8,726,243	5,033,662
	28	506,885	3,045,166	1,438,754	4,990,805	4,081,425
January	4	442,566	2,081,195	991,812	3,515,573	5,262,802
	11	705,136	2,557,353	1,476,836	4,739,325	4,794,451
	18	932,593	4,017,553	1,453,041	6,403,187	5,561,996
Total		31,322,281	146,881,411	56,449,684	234,653,376	133,216,160

<sup>1/</sup> Revised.





\* Revised marketings for 1943-44 total 325 million bushels; weekly revisions are not yet available.

## DELIVERY QUOTAS ON WHEAT

On January 20 some 88 per cent of all delivery points in the Prairie Provinces were on an open quota with 100 per cent open in Manitoba, 86 per cent in Saskatchewan and 85 per cent in Alberta. In January of 1944 75 per cent of all points were on a 14 or 10 bushel quota.

Barley and rye are now on an open delivery basis while most points were on a 10 bushel quota a year ago. About one-half of western delivery points are on an open quota for oats; the rest are on a 10 with a few on a 15 bushel basis. Nearly all points were on a 10 bushel quota a year ago.

The summary of the quota position in all the western provinces, compiled by the Canadian Wheat Board as at January 20, 1945, is shown below:

Delivery Quota	Manitoba		Saskatchewan		Alberta		British Columbia	
	Points	%	Points	%	Points	%	Points	%
3 bushels ....	-	-	-	-	-	-	-	-
10 bushels ....	-	-	24	2	30	5	-	-
15 bushels ....	-	-	94	8	59	10	-	-
20 bushels ....	-	-	44	4	1	-	-	-
Open Quota ....	368	100	965	86	503	85	4	100
T o t a l .....	368	100	1,127	100	593	100	4	100

Taking the western provinces as a whole the position is as follows at the close of the 25th week of the current crop year with the comparable position one year ago:

	1945		1944	
	Points	% of Total	Points	% of Total
3 bushels per "authorized" acre ..	-	-	39	2
5 bushels per "authorized" acre ..	-	-	151	7
7 bushels per "authorized" acre ..	-	-	353	17
10 bushels per "authorized" acre ..	54	3	609	29
14 bushels per "authorized" acre ..	-	-	951	45
15 bushels per "authorized" acre ..	153	7	-	-
20 bushels per "authorized" acre ..	45	2	-	-
Open Quota .....	1,840	88	-	-
T o t a l .....	2,092	100	2,103	100

## WHEAT VISIBLE SUPPLY

The following table shows stocks of Canadian wheat in store and in transit in Canada and the United States on January 18, 1945, along with comparative figures for approximately the same date in 1944 and 1943:

	<u>1945</u>	<u>1944</u>	<u>1943</u>
		(000 bushels)	
Country Elevators - Manitoba .....	16,655	27,190	29,705
Saskatchewan .....	88,720	106,355	117,470
Alberta .....	68,820	75,960	74,310
T o t a l .....	174,195	209,505	221,485
Interior Private and Mill Elevators .....	5,318	5,079	6,027
Interior Public and Semi-Public Terminals ..	9,597	11,027	17,318
Pacific Ports .....	18,359	15,542	19,630
Churchill .....	1,878	1,878	2,617
Fort William and Port Arthur .....	46,512	20,059	96,807
Eastern Elevators - Lake Ports .....	35,738	27,954	43,978
St. Lawrence and Seaboard Ports .....	23,354	12,982	28,142
United States Ports .....	31,755	23,826	13,889
Storage Afloat .....	7,558	6,191	6,069
In Transit - Rail .....	10,666	10,669	6,787
In Transit - U.S.A. ....	7,607	6,064	4,414
T o t a l .....	372,537	350,776	467,163

## MOVEMENT OF WHEAT TO MARITIME PORTS

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

	<u>August 1, 1944 to January 18, 1945</u>	<u>August 1, 1943 to January 20, 1944</u>
	- bushels -	
Collingwood .....	2,698,534	827,451
Midland .....	6,747,230	8,175,012
Owen Sound .....	2,668,918	1,283,984
Port McNicoll .....	7,093,125	6,187,524
Goderich .....	970,042	472,471
Sarnia .....	-	284,919
Fort Colborne .....	-	326,820
Kingston .....	310,000	14,700
Prescott .....	148,431	1,066,668
Montreal .....	4,593	3,097
Sorel .....	-	631,558
Three Rivers .....	-	585,912
T o t a l .....	20,640,873	19,860,116



## WHEAT SHIPMENTS TO THE UNITED STATES

More than 74 million bushels of Canadian wheat have been shipped to the United States since August 1. The greater part of this wheat has been carried by lake vessel to the port of Buffalo. Approximately 19 million bushels of the 74 million shipped is still held in American storage positions—almost all of it in winter storage afloat—and the remainder re-exported as wheat or flour or retained for domestic consumption in the United States. The Bureau of Agricultural Economics reports that about 35 million bushels of wheat will likely be imported into the United States during the current crop year. Total stocks of Canadian wheat in storage in American positions on January 18 totalled 31.8 million bushels as compared with 13.0 million on August 4.

An examination of the grades shipped since the beginning of the crop year indicates that 2 Northern has predominated with 42 per cent of the total. About 15 per cent each of Nos. 1 and 3 Northern were included and 22 per cent of all grades, other than Durum.

### Shipments August 1 to January 18

	<u>1945</u>	<u>1944</u>
	- bushels -	
<u>By Vessel</u>		
U.S.A. Pacific Ports .....	686,666	5,857,375
U.S.A. Atlantic Ports .....	-	740,219
Buffalo .....	38,462,390	37,777,580
Chicago .....	7,746,957	3,894,067
Duluth-Superior .....	5,479,526	15,523,566
Erie .....	8,365,922	9,246,344
Milwaukee .....	677,554	-
Ogdensburg .....	-	557,137
Oswego .....	1,615,403	543,044
Toledo .....	4,829,371	3,113,537
 <u>By Rail</u>		
Seaboard Ports .....	5,562,839	9,615,944
Other points .....	779,408	8,325,666
 T o t a l .....	74,206,036	98,194,479

# RAIL MOVEMENT FROM FORT WILLIAM-FORT ARTHUR

The marked seasonal variation in rail shipments east from the Lakehead is evident from the movement occurring during the month of December. Despite the large relative increase in December, it is doubtful if shipments during January will come up to the 4.4 million bushels moved in January a year ago.. Some 1.3 million bushels had been shipped during the first 18 days of the present month.

The 200,000 bushels of No. 1 Northern moved to Ontario in December is the first shipment of higher grade wheat to be moved east by rail for some months.

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

	1944-45	1943-44	1942-43	1941-42
	- bushels -			
August .....	91,891	990,879	390,264	90,122
September .....	169,603	1,547,042	600,921	143,816
October .....	86,572	780,035	644,926	209,376
November .....	97,512	711,238	1,250,952	472,194
December .....	1,236,339	898,565	3,871,297	1,488,427
January .....		4,364,158	1,757,163	1,781,993
February .....		4,397,318	3,196,248	1,436,455
March .....		1,076,142	1,997,275	1,380,199
April .....		107,257	3,968,148	1,066,342
May .....		271,533	1,135,059	396,360
June .....		108,739	999,605	626,520
July .....		47,516	983,324	888,749
Total (12 months) .....		15,300,422	20,795,182	9,980,553

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

	Ontario	Quebec	New Brunswick	Nova Scotia	Prince Edward Island
	- bushels -				
1 Northern .....	200,520	-	-	-	-
2 Northern .....	13,347	30,000	-	-	-
3 Northern .....	15,661	-	-	-	-
4 Northern .....	95,153	317,467	27,000	2,633	-
No. 5 .....	86,000	237,400	21,000	1,500	3,000
No. 6 .....	11,000	6,000	-	1,500	-
Feed .....	4,500	4,500	-	3,000	-
Tf. Rej. 3 Nor. Sptd. ..	1,500	3,000	-	1,500	-
Smutty 2 Nor. ....	9,000	33,000	-	-	-
Smutty 3 Nor. ....	3,000	13,500	-	-	-
2 C.W.A.D. ....	20,000	-	-	-	-
3 C.W.A.D. ....	18,000	-	-	-	-
4 C.W.A.D. ....	7,500	43,542	-	-	-
2 A.W. ....	1,616	-	-	-	-
T o t a l .....	486,797	688,409	48,000	10,133	3,000

GRAND TOTAL .. 1,236,339





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## EXPORTS OF CANADIAN WHEAT AND FLOUR

The following table sets out the complete month-by-month exports to all destinations during the crop year 1943-44, with comparative figures for the four preceding years.

	1943-44 1/	1942-43	1941-42 1/	1940-41	1939-40
	- bushels -				
August .....	27,716,862	15,546,739	20,391,405	11,560,065	13,198,877
September .....	22,215,056	9,827,484	15,556,038	9,622,992	14,688,827
October .....	23,844,843	14,169,255	14,314,814	10,810,971	9,220,393
November .....	23,188,842	15,637,315	17,752,672	13,705,174	18,826,047
December .....	25,419,684	8,389,775	20,259,936	8,953,630	15,480,129
January .....	30,196,990	13,878,802	18,166,222	15,220,986	20,142,824
February .....	33,525,149	15,650,208	15,610,033	18,110,049	16,556,686
March .....	27,905,974	23,128,154	20,046,761	21,497,072	21,262,085
April .....	41,315,967	23,272,531	29,696,162	30,757,859	16,831,280
May .....	36,658,430	26,180,186	23,705,259	36,815,411	22,366,323
June .....	26,336,025	27,190,819	17,054,252	31,084,121	12,042,247
July .....	25,431,498	21,823,634	13,274,880	23,067,916	12,046,650
Crop Year Totals ....	343,755,320	214,700,902	225,828,434	231,206,246	192,674,368

## FREIGHT ASSISTANCE SHIPMENTS

The provincial distribution is shown in the following table, by months, with comparative totals for the crop year 1943-44:

1944-45	Ontario	Quebec	New Brunswick	Nova Scotia	Prince Edward Island	British Columbia	Total
	- bushels -						
August 1/ ...	988,535	776,668	78,282	128,815	46,601	362,562	2,381,463
September 1/.	872,908	830,793	76,745	111,220	39,178	349,657	2,280,501
October 1/ ..	838,220	656,637	77,668	107,848	23,432	328,680	2,032,485
November ....	845,393	978,937	61,807	81,037	21,825	132,035	2,121,034
T o t a l ...	3,545,056	3,243,035	294,502	428,920	131,036	1,172,934	8,815,483
Same Period							
1943-44 ....	5,721,444	3,638,011	376,682	538,862	214,245	1,365,496	11,854,740

## Millfeeds

The distribution of millfeeds under the Freight Assistance Plan is shown for the five eastern provinces in the following table. One column of figures covers the first four months of the present crop year and the other the corresponding period a year ago.

	August 1, 1944 to November 30, 1944	August 1, 1943 to November 30, 1943
	- tons -	
Ontario .....	65,829	80,838
Quebec .....	97,895	93,900
New Brunswick .....	15,671	17,949
Nova Scotia .....	21,758	19,090
Prince Edward Island ...	3,378	5,880
T o t a l .....	204,681	217,657

1/ Revised.