

DOMINION BUREAU OF STATISTICS AGRICULTURAL BRANCH

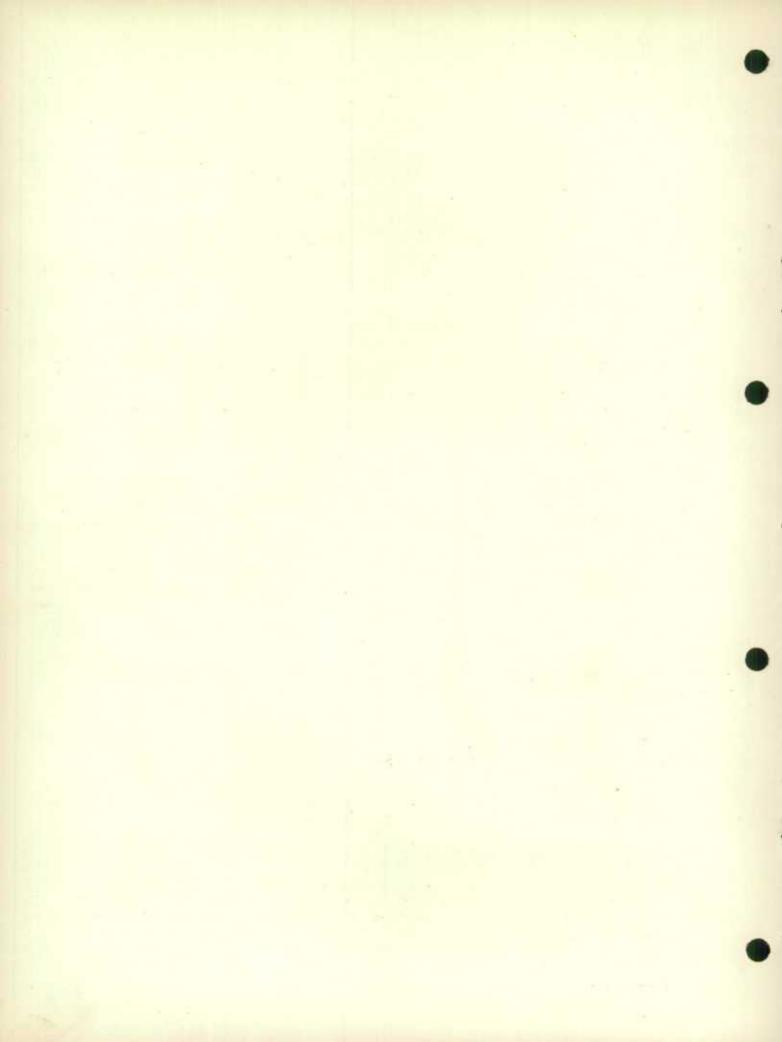
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MONTHLY REVIEW OF THE WHEAT SITUATION

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

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WORLD WHEAT SITUATION - SUMMARY

During the past month the governments of Australia and Canada have announced their wheat price and production policies for the coming year.

Australia

The supply position of Australia remains exceedingly tight and the present change in policy is indicative of the desire of that country to replenish her wheat stocks. The 1945 production goal calls for a seeded area of 11 million acres as compared with a seeded acreage of 8.3 million acres in 1944. Farmers in areas of crop failure are being permitted to double their licensed wheat acreages. The marketing quota scheme which provided for the payment of a guaranteed advance of 72 cents per bushel at the growers' siding on only the first 3,000 bushels delivered by each farmer has now been suspended.

A cabled comment from Melbourne states that the guaranteed price has been raised to 75 cents per bushel and is apparently applicable to any quantity of wheat delivered by a grower. Any increase in wheat acreage in Australia is, however, contingent on the supply of superphosphates which have been very short during the war. This factor, together with a shortage of manpower, were thought to render the present goal of 11 million acres the maximum area which farmers could be expected to seed to wheat for the 1945-46 harvest. Normal yields of slightly over 12 bushels per acre on this recommended acreage would result in a crop of about 135 million bushels.

Canada

Canada's wheat policy for 1945-46 is outlined in a press release of March 2, which is reprinted here.

"Honourable J. A. MacKinnon, Minister of Trade and Commerce, today announced the Dominion Government's 1945-46 programme for wheat and feed grains as well as the basis upon which additional stocks of Crown wheat have been acquired.

Wheat policy for 1945-46 involves the continuation of the fixed initial price of \$1.25 per bushel for No. 1 Northern wheat in store Fort William-Port Arthur and Vancouver and the issuing of participation certificates.

The change in wheat policy is the inclusion of a firm limitation on producers' marketings in 1945-46 to fourteen bushels per authorized acre. In previous crop years a limitation on marketings has been established on the basis of permitting the marketing of as much wheat as could be sold in the commercial domestic market and in the export market. This policy assumed the carrying of a large wartime reserve of wheat in Canada. In the opinion of the government, the need for a large wartime reserve of wheat is now passing and market demand in 1945-46 will be supplied out of the accumulated reserve and 1945-46 marketings by producers. The limitation on

marketings to 14 bushels per authorized acre provides for a substantial reduction of commercial stocks of wheat in Canada by July 31st, 1946 and represents the application of a new principle necessary to the transition from a wartime to a peacetime basis.

Mr. MacKinnon stated that the Dominion Government does not feel that post-war wheat policies should be unduly influenced by large stocks of wheat accumulated during the war.

Mr. MacKinnon stated that he desired to stress the fact that the limitation of marketings to 14 bushels per authorized acre in 1945-46 is final and will not be altered at a later date. The carry-over of wheat at the end of the present crop year plus wheat marketed by producers under the 14 bushel limitation will provide ample wheat to meet market demand during the coming crop year. The Dominion Government is announcing its wheat policy now in order to give producers ample time to adjust their 1945 seeding programme to the new policy. It is the hope of the government that wheat acreage will be reduced in 1945 and acreages sown to feed grains substantially increased in accordance with the recommendations of the Dominion-Provincial Agricultural Conference.

The 1944-45 programme for oats and barley will be continued in 1945-46 stated Mr. MacKinnon. Minimum prices of .45¢ per bushel for oats and .60¢ per bushel for barley, basis top grades in store Fort William and Port Arthur will again be effective. Advance equalization payments of .10¢ per bushel on oats and .15¢ per bushel on barley will continue and will be made at the time of delivery.

Mr. MacKinnon stated that stocks of wheat acquired by the Crown on September 27th, 1943 have now been disposed of and the government has acquired a new stock of wheat for Mutual Aid purposes. This new supply of Crown wheat has been acquired by the government from the 1943-44 and 1944-45 Board accounts on the basis of the Board's commercial price on January 29, 1945 less an allowance for carrying charges. The new purchase of Crown wheat will permit the closing out of the 1943-44 Board account before the end of the present crop year and insures a payment on 1943-44 participation certificates.

All wheat required for the domestic market between the date of the exhaustion of old stocks of Crown wheat and July 31st, 1946 will be provided by the Canadian Wheat Board from the 1943-44 and 1944-45 Board accounts at \$1.25 per bushel basis No. 1 Northern wheat in store Fort William, Port Arthur and Vancouver plus carrying charges. In other words on sales of wheat from the 1943-44 and 1944-45 Board accounts for domestic use producers will neither gain nor lose, the Board selling wheat for domestic purposes at cost. The basis of Board sales of wheat for domestic use takes into account the price control policies of the Dominion Government.

In providing for Participation Certificates covering 1945-46 deliveries to the Board, the Minister pointed out that 1943 and 1944 crops will be sold before sale of 1945 wheat will commence. Actually the Board will not start to sell 1945 wheat until 1946 and consequently substantial carrying charges will accrue against 1945-46 deliveries before these deliveries are finally sold.

The Board's fixed price for No. 1 C.W. Flaxseed, basis in store Fort William-Port Arthur will continue unchanged at \$2.75 per bushel for the 1945-46 crop year."

(March 3, 1945)

DELIVERY QUOTAS ON WHEAT

Additional delivery points have been added to the "open quota" list until 94 per cent of all points are now on that basis. At this time a year ago 77 per cent of the delivery points in the Prairie Provinces were on a 14 bushel basis.

The storage capacity of licensed elevators, including annexes, in the Prairie Provinces was rated at 305.4 million bushels as at July 31, 1944. On February 23 there were 202.8 million bushels of grain in country elevators as compared with 242.8 million bushels on February 24, 1944.

The Wheat Board has recently placed restrictions on the shipment of wheat, oats or barley from certain points in the Prairie Provinces.

The summary of the quota position in all the western provinces, compiled by the Canadian Wheat Board as at February 21, 1945, is shown below:

Delivery Quota	Manit	oba	Saskatch	hewan	Albe	rta	British C	olumbia
	Points	75	Points	%	Points	8	Points	%
10 bushels		4	8	1	10	2		400
15 bushels	192 (4)	11-11	51	5	32	5	an	-
20 bushels	10-1	-	26	2	- 1	-	* · ·	-
Open Quota	368	100	1,042	92	551	.93	4	100
Total	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 30th week of the current crop year with the comparable position one year ago:

	1	9 4 5	1	9 4 4
	Points	% of Total	Points	% of Total
5 bushels per "authorized" acre	-	-	8	9-1-
7 bushels per "authorized" acre	TOTAL ST	-	75	4
10 bushels per "authorized" acre	18	1	401	19
14 bushels per "authorized" acre			1,613	77
15 bushels per "authorized" acre	83	4	-	-
20 bushels per "authorized" acre	26	1	en .	
Open Quota	1,965	94	-	
Total	2,092	100	2,097	100

CHICAGO WHEAT FUTURES

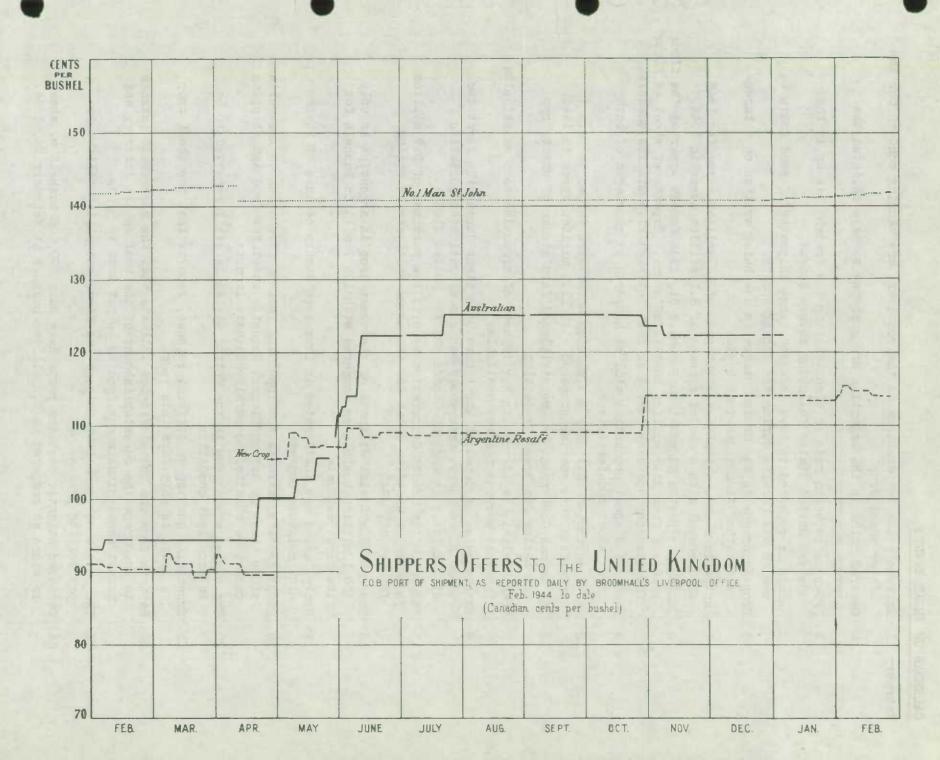
The losses suffered by Chicago wheat futures around the tenth of the month were attributed to several factors:

- 1. A report that labour costs would not be included in the calculation of parity prices until after the war.
- 2. Milder weather was anticipated which would have eased the transportation situation and permitted a freer movement of wheat from farms.

Toward the close of the month all factors showed strength and cash wheat was trading at ceiling levels. Traders appeared to believe that European requirements were going to be greater than anticipated, owing partly to poor crop prospects on the continent. The short crops in the Southern Hemisphere also exerted a bullish influence while such domestic factors as reduced requirements of wheat for feed and the excellent conditions prevailing in the winter wheat areas were ignored.

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

1944-1945	May	July	September	December
		(cents and eigh	hths per bushel)	
January 29	160/3	152/2	151/2	151/7
30	160	152/1	151/3	151/6
31	161/6	153/4	152/6	153/1
			ONL BOOK	
February 1	161/5	154/1	153/3	153/6
2	162	154/4	153/6	154/2
3	162/5	154/7	154/1	154/5
5	163/2	155/1	154/2	154/7
6	163/7	155/5	154/6	155/1
7	163/7	155/4	154/4	155/1
8	161/5	153/2	152/1	152/4
9	161	152/2	151/1	151/4
10	160/7	152/6	151/5	152/2
12			n's Birthday	· ·
13	162/1	154/4	153/4	154
14	162/2	154/2	153/4	154
15	161/7	153/7	152/6	153/1
16	163/1	155/6	154/6	154/6
17	162/5	155	154	154/2
19	163/4	156	154/7	154/7
20	164	156/2	154/3	154/5
21	164/5	156/3	154/7	155
22			ton's Birthday	IL THE STATE OF THE
23	164	155/1	153/5	153/7
24	164/3	155/3	153/6	153/6
	-			



CALENDAR OF WHEAT EVENTS

- February 1 Extremely low temperatures on the continent are causing concern for the winter wheat crop.
 - 2 General rains in the Argentine are reported to have relieved the severe drought.
 - 3 Progress is being made in disentangling the freight tie-up in the Eastern United States following severe storms.
 - 5 Russia is reported to have received large shipments of seed grain to sow in the Ukraine during the coming spring.
 - 6 Crop insurance in the United States is now being written on a threeyear rather than a one-year basis.
 - 7 Australia has established a wheat goal of 11 million acres for 1945 as compared with a seeded acreage of 8.1 million acres in 1944.
 - 8 During the period August 1 to December 31, 1944 Canada exported the flour produced from 23.8 million bushels of wheat. Exports of wheat as flour for the corresponding period in 1943 totalled 21.6 million bushels.
 - 9 Australian wheat production will be hampered by shortages of both farm labour and fertilizer
 - 10 It is estimated that only 9.9 million acres were seeded to corn in Argentina this year as compared with 11.3 million acres in 1944.
 - 12 The German Government has requisitioned farm stocks of wheat, rye and barley for bread production.
 - 13 Great Britain is increasing her imports of Argentine corn as shipping for this purpose becomes available.
 - 14 Export sales of Canadian wheat have been light during the first two weeks of February, apparently because of rail transportation difficulties in Eastern Canada and the United States.
 - 15 The Commodity Credit Corporation reports the purchase of 5.9 million bushels of Canadian wheat for the seven month period ending January 31, 1945.
 - 16 The second official estimate of the wheat crop in Argentina is only 156.1 million bushels as compared with 166.7 million bushels for the first estimate.
 - 17 Heavy losses are anticipated in Iowa corn stocks because of their high moisture content.
 - 19 Press reports indicate the impending loss of live stock in Australia since there is not sufficient domestic wheat for feed and shipping cannot be obtained to permit adequate imports.
 - 20 The winter wheat crop in the United States is still reported to be in excellent condition.
 - 21 Broomhall, quoting an official release, reports that the wheat crop in India is only fair this year.
 - 22 Reports from the United Kingdom indicate that the government intends to encourage the re-establishment of the beef cattle industry and permit submarginal wheat land to be put back to grass.
 - 23 The cash wheat market at Chicago was firm, compelling millers to pay ceiling prices.
 - 24 Canadian Atlantic seaboard ports have only 820,000 bushels of wheat in store as compared to 4.2 million bushels at February 24, 1944.

UNITED STATES

An extensive area in the American north-east has been digging itself out of drifting snow and doing its best to get supplies moving through plugged rail and road routes. Although the movement of grain has been seriously hampered and feed shortages have become acute in some areas, milk production has been well maintained. This deep snow cover has not, of course, harmed crop prospects.

The Great Plains States have received normal fall and winter rainfall after a wet spring and summer so that soil moisture reserves in most areas are above normal. The prospects for the winter wheat crop continue to be very promising. The State of Kansas, which normally produces about 125 million bushels of winter wheat or over a fifth of the total winter wheat crop in the United States has a crop of over 200 million bushels in prospect for 1945 on a seeded acreage of 13.6 million acres. With warmer weather now beginning the crop is greening up and starting to grow.

Crop insurance is now being made available to farmers on their 1945 spring wheat crops. Two contracts will be offered; one covering up to 75 per cent of average yields and the other up to 50 per cent. These contracts will run for three years with annual premium payments.

This insurance plan will not be available to a county unless applications covering 50 farms or one-third of the farmers producing insurable crops within that county, whichever is less, are filed. This plan is not applicable to the 1945 winter wheat crop since it has already been seeded, but will be available for the 1946 winter wheat crop. The administrative details of the plan in the individual counties are being handled by the existing organization of the Agricultural Adjustment Agency.

A House resolution has been introduced to extend the life of the Commodity Credit Corporation until June 30, 1947 and to increase its borrowing power to 5 billion dollars. This measure is designed to assure the capacity of this organization to support the price of the basic commodities, including wheat, and others for which substantial increases in production have been asked, at a level of not less than 90 per cent of parity for two years following the cessation of hostilities. Other revisions have been made in an effort to permit this Agency to more adequately fulfill its function of stabilizing the prices and supplies of agricultural commodities. One of the large programs of the Corporation in 1944 was the purchase and sale of feed wheat which was designed to permit a continued full production of meats, milk and other live-stock products.

Through February 10 the Commodity Credit Corporation had completed loans on 183 million bushels of wheat with 48.2 million bushels stored on farms and 134.9 million bushels in warehouses. Some 19.5 million bushels of this wheat has been redeemed however. The average amount advanced was \$1.375 per bushel. On the same date last year loans had been completed on 129.5 million bushels.

Exports under the suspended Wheat Export Program have aggregated less than 291,000 bushels. Exports of flour under the Wheat Flour Export Program have been in greater volume, amounting to 7.4 million bushels, wheat equivalent, from the inception of the plan to February 16. About two-thirds of this flour has gone to Suba with smaller shipments to Central and South America.

ARGENTINE LETTER

The correspondent of the Dominion Bureau of Statistics in Buenes Aires has forwarded the following report under date of February 14, 1945:

Crop Conditions

In the official report on agricultural conditions in the Republic for the month of January the Ministry of Agriculture states that the month was characterized by a lack of rains throughout the country, permitting continued harvesting and threshing of the wheat crop. This lack of rain, high temperatures and winds of varying intensity had an unfavourable influence on the development of growing crops, as well as on the pastures, both native and alfalfa, causing a deterioration in the condition of live stock. As January ended general rains throughout the country were experienced, benefitting both crops and pastures.

The dry weather in January permitted cutting and threshing of the wheat crop to terminate favourably. Average yields obtained were as follows: Buenos Aires 16 bushels per acre; Santa Fe 14 bushels; Entre Rios 7 1/2 bushels; Cordoba 8 1/2 bushels; Corrientes 8 bushels and The Pampa 13 bushels per acre. The quality of the wheat is generally fair.

Distribution of Wheat Crop by Types

A memorandum recently made public by the Ministry contains an analysis of the types of wheat comprising the 1944-45 crop. These are as follows: Hard wheat 19 per cent; Semi-Hard 74 per cent; Soft wheat and unsuitable varieties 7 per cent.

Second Official Estimate of Grain Production in 1944-45

The new official estimate is shown below with the first estimate and last season's production for comparison:

	Second Estimate 1944-45	First Estimate 1944-45	Production 1943-44
	bu.	bu.	bu.
Wheat	156,132,000	166,703,000	249,853,000
Linseed	30,215,000	33,148,000	61,926,000
Oats	67,896,000	59,330,000	59,979,000
Barley	26,377,000	27,328,000	33,005,000
Rye	10,216,000	16,889,000	21,928,000

Supplies and Markets

With only incomplete information at one's disposal regarding stocks of wheat and possible compromises entered into, with reference to its disposal, one is rather handicapped in attempting to reduce the situation to a clear statement. Hence this analysis must be understood to be of a provisional nature and subject to later revision.

As a starting point I will take an official statement published in December giving a "saldo Disponible" or disposable balance of 156,024,000 bushels of wheat, upon which the following is readily erected:

Available balance as at November 30, 1944		sledend "
Total Supplies	312,156,000	tt
Wheat shipments in January		
Flour shipments in January and December 1,796,000 "	12,671,000	19
Balance still available	299,485,000	**
Deduct for seed and domestic consumption	102,881,000	17
Balance still available	196,604,000	11

There is little to be said with regard to market conditions, and practically no change can be recorded. Some sales were made to the United Kingdom of wheat of the 1943-44 crop, and it is understood that more sales might be made in the same quarter but for shipping difficulties which still exist. Some sales were made to Spain, Peru and Greece, but perhaps the principal buyers were the local millers, who are permitted to acquire in the open market up to a total of 30 per cent of their gross needs with the proviso that the prices they pay must not be under the official minimum of 9 pesos per 100 kilos, the equivalent of 81 cents Canadian per bushel.

It is understood that during the past month the donation of 1,837,000 bushels of wheat to Greece by the Argentine Government has been rather more than fulfilled.

AUSTR LIAN CABLE

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

*Unsold wheat stocks in Australia at February 10th totalled
84 million bushels. Harvesting has been practically, completed with the
new crop estimated at 52 million bushels. The Federal Cabinet has
decided that for the 1945-46 wheat harvest the Scully Wheat Quota Scheme
will be suspended. As a first advance an increased price of 75 cents a
bushel at the farm has been guaranteed. The Scully Quota Plan at present
provides for payment of 72 cents at sidings for the first 3,000 bushels
with an advance of 53 cents for wheat in excess of the first 3,000 bushels.
The inducements now given wheat farmers to plant more grain are
(1) increased guaranteed prices (2) temporary registration for one year to
any person who desires to plant wheat (3) doubling up of wheat acreages
that have failed and (4) licensed farmers may plant a greater basic acreage."

The Class 2 price of Canadian wheat has risen about 5 cents over the January average and at \$1.51 for No. 1 Northern is now the highest it has been since the inception of this marketing plan in October of 1943. The previous highs were recorded in April and May of 1944 for which months the average price was \$1.48 for the second grade of Manitoba spring wheat.

The monthly average of Class 2 prices from October 1943 to January 1945, together with daily prices for February, are as follows:

Canadian Wheat Board Prices

	Odlidula	Odnatian inteas board 111005				
	1 Northern	2 Northern	3 Northern	4 Northern		
1943		(cents and eigh	nths 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		
1944						
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		
1945						
January	145/6	142/6	140/6			
February 1	148	145	143			
2	148	145	143			
3	149	146	144			
5	150	147	145			
6	150	147	145			
7	150	147	145			
8	150	147	145			
9	150	147	145			
10	150	147	145			
12	150	147	145			
13	150	147	145			
14	150	147	145			
15	150	147	145			
16	150	147	145			
17	150	147	145			
19	150	147	145			
20	150	147	145			
21	151	148	146			
22	151	148	146			
23	151	148	146			
24	151	148	146			

CANADIAN SUPPLY FOSITION

Canada's supply of wheat at February 1 available for export and/or carry-over at July 31, 1945, amounted to 492 million bushels as compared with 546 million bushels at February 1, 1944.

Although total exports during the first four months of the crop year were slightly above those of a year ago they have now fallen behind. Export clearances overseas to the first of February 1945 were about 18 million bushels ahead of the comparable period for last year, but imports of Canadian wheat into the United States have declined sufficiently to pull total exports below the level attained during the first six months of the crop year 1943-44.

It is going to be increasingly difficult to keep close to last year's rate of exports since American imports were running very high during the latter half of the crop year. Wheat exports for 1943-44 totalled 283.2 million bushels and another 60.5 million bushels were exported as flour.

Canadian Theat Supplies

	1944-45	1943-44
	- 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-January 31	110.9 1/	125.9
Flour exports in terms of wheat August-January 31	27.6	26.7
Total exports wheat and flour	138.5	152.6
Balance on February 1 for export or carry-over	492.1	546.2

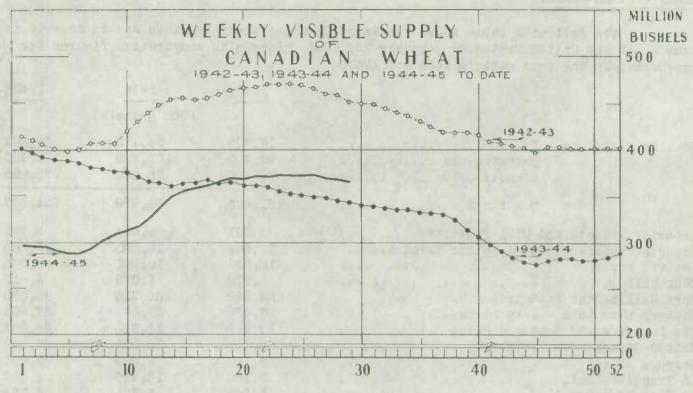
^{1/} Customs exports plus or minus change in stocks of Canadian wheat in store in the United States.

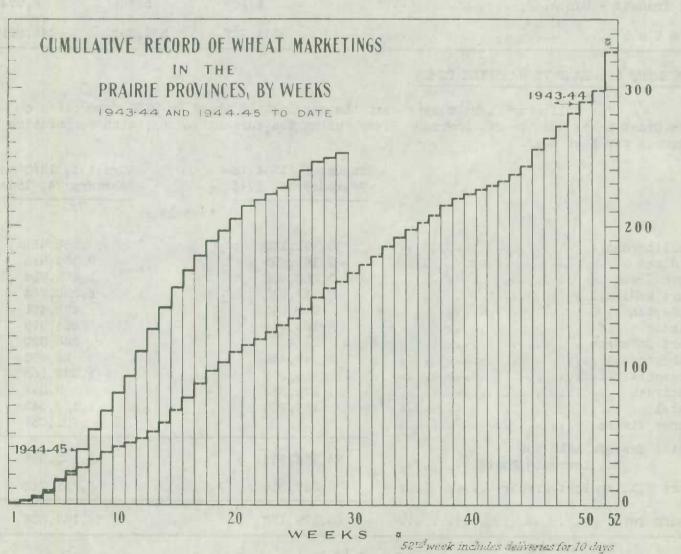
Farmers' marketings in the West up to February 22 have amounted to about 256 million bushels as compared with 167 million bushels for a similar period in the 1943-44 crop year. Deliveries have been smaller during the week ending February 22 than for any week since August.

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 endi	ng	Manitoba	Saskatchewan	Alberta	Totals	Last Year 1/
			-	bushels -		CEE STORM
August	1-3	555,480	415,651	496,881	1,468,012	688,803
	10	35,938	444,684	241,849	722,471	1,809,882
	17	92,087	1,051,440	752,355	1,895,882	3,992,587
	24 31	1,025,622 2,296,542	2,776,348 3,955,228	885,577 1,077,113	4,687,547 7,328,883	4,172,199 5,029,855
September	7	492,048	5,399,007	1,580,961	7,472,016	4,566,630
	14	1,710,923	10,021,382	3,559,390	15,291,695	5,186,948
	21	931,482	10,255,922	3,357,451	14,544,855	6,172,686
	28	1,980,799	9,107,342	2,326,279	13,414,420	4,980,883
October	5	2,665,704	8,245,689	1,637,966	12,549,359	4,007,147
	12	2,137,984	7,313,697	2,682,451	12,134,132	3,206,200
	19	2,312,322	9,546,731	6,047,404	17,906,457	3,248,516
	26	2,783,438	9,228,347	5,100,705	17,112,490	4,014,935
November	2	2,567,150	9,715,890	3,600,876	15,883,916	6,551,277
	9	1,722,308	7,785,862	4,647,417	14,155,587	8,992,094
	16	968,593	8,412,483	2,902,779	12,283,855	9,962,549
	23	1,076,788	8,104,903	2,546,855	11,728,546	9,944,535
	30	973,232	6,963,478	1,812,345	9,749,055	8,863,214
December	7	759,840	4,748,635	1,623,464	7,130,939	6,340,881
	14	952,838	5,877,287	1,988,001	8,818,126	6,770,417
	21	693,983	5,810,138	2,222,122	8,726,243	5,014,470
	28	506,885	3,045,166	1,438,754	4,990,805	4,098,429
January	4 11 18 <u>1</u> / 25	442,566 705,136 941,862 871,897	2,081,195 2,557,353 4,043,588 3,688,031	991,812 1,476,836 2,219,758 1,830,810	3,515, 573 4,739,325 7,205,208 6,390,738	5,384,524 4,646,835 5,578,271 7,594,873
February	1	582,489	2,872,139	1,959,648	5,414,276	8,194,611
	8	488,129	1,459,343	1,275,036	3,222,508	7,755,496
	15	290,386	1,499,312	1,167,123	2,956,821	5,014,487
	22	227,164	1,267,315	894,077	2,388,556	5,530,995
Total		33,791,615	157,693,586	64,343,095	255,828,296	167,315,229

^{1/} Revised





WHEAT VISIBLE SUPPLY

The following table shows stocks of Canadian wheat in store and in transit in Canada and the United States on February 22, 1945, along with comparative figures for approximately the same date in 1944 and 1943:

	1945	1944	1943
		(000 bushels)	
Country Elevators - Manitoba	18,725	26,175	29,360
Saskatchewan	92,400 70,300	105,2 35 75,460	116,480 75,985
Total	181,425	206,870	221,825
Interior Private and Mill Elevators	5,381	5,894	5,781
Interior Public and Semi-Public Terminals	11,669	10,883	16,880
Pacific Ports	18,632	10,201	19,575
Churchill	1,878	1,878	2,617
Fort William and Port Arthur	52,848	26,735	98,835
Eastern Elevators - Lake Ports	27,656	23,672	37,805
St. Lawrence and Seaboard Ports	19,489	12,322	26,505
United States Ports	25,655	16,493	8,048
Storage Afloat ,	4,710	3,059	3,939
In Transit - Rail	7,188	15,499	4,853
In Transit - U.S.A	6,266	5,726	2,994
Total	3 62,79 7	339,232	449,651

MOVEMENT OF WHEAT TO MARITIME PORTS

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

	August 1, 1944 to February 22, 1945	August 1, 1943 to Fabruary 24, 1944
	- b	oushels -
Collingwood Midland Owen Sound Port McNicoll Goderich Sarnia Port Colborne Kingston Prescott Montreal Sorel	2,991,122 7,181,695 3,282,607 8,157,927 970,042 104,436 	968,451 8,334,912 1,403,714 6,280,764 472,471 284,919 326,820 14,700 1,257,168 3,097 1,357,543 701,037
Total Eastern Lake and St. Lawrence Ports	24,763,962	21,405,596
Fort William-Port Arthur	365,216	2,741,742
GRAND TOTAL	25,129,178	24,147,338

Shipments of Canadian wheat to the United States up to February 22 of this year total 76.3 million bushels as compared with 110.3 million bushels a year ago.

Some 34 million bushels of this wheat has been exported overseas from United States Ports and present stocks of Canadian grain in the United States are about 32 million bushels. Since stocks of Canadian wheat in the United States at August 1 amounted to about 18.9 million bushels, it would appear that the United States has imported about 30 million bushels of Canadian wheat since August 1, 1944. During the seven months of the crop year ending February 29, 1944 the United States imported about 80 million bushels of Canadian wheat.

Shipments August 1 to February 22

1945

- bushels -

By Vessel

U.S.A. Pacific Ports	686,666	13,270,012
U.S.A. Atlantic Ports	69	740,219
Buffalo	38,462,390	37,777,580
Chicago	7,746,957	3,894,067
Duluth-Superior	5,479,526	15,523,566
Brie	8,365,922	9,246,344
Milwaukee	677,554	
Ogdensburg	10G-	557,137
Oswego	1,615,403	543,044
Toledo	4,829,371	3,113,537

By Rail

Seaboard Ports	7,489,198	11,200,984
Other points	978,198	14,420,205

RAIL MOVEMENT FROM FORT WILLIAM-PORT ARTHUR

During the month of January over 1.9 million bushels of wheat were moved to the East by rail from Fort William-Port Arthur. This compares with 1.2 million in December and 4.4 million bushels in January of 1944.

The record for February will indicate a substantial reduction as shipments of wheat from the Lakehead have dropped from an average of 45 cars per day during January to an average of 19 cars per day during the first three weeks of February.

The grades of wheat shipped during January 1945, and the provincial distribution of the rail movement are shown in the following table:

	Ontario	Quebec	New Brunswick	Nova Scotia	Frince Edward Island
			- bushels -	85-10	
l Hard	5,000	diffes	-	-	-
Northern	98,000	-	-	-	~
2 Northern	200,000	95,000	-	-	-
3 Northern	40,000	Sugar of the	- PAR -	-	-
4 Northern	200,500	86,000	1,500	3,000	1,500
No. 5	196,493	285,000	25,500	-	4,500
No. 6	30,000	39,000	1,500	13,500	1,500
Feed	24,000	18,000	W. T	7,500	-
rough 4 Northern	13,500	55,500	-	1,500	
Tough No. 5	11,000	7,500	-	-	differ
Rej. 1 Nor. Mxd. Htd	6,000	25,500	-	-	-
Rej. 2 Nor. Mxd. Htd	3,000	6,500	_	-10-10	-
Rej. 3 Nor. Mxd. Htd	_	-		1,500	
Rej. 3 Nor. Mxd. Rotten Kernels.	den	1,500		- 59	_
Rej. 3 Nor. Sptd.	1,500	-	-	-	ann .
If. Rej. 3 Nor.	-	1,500	Design of the sale		-
Pf. Rej. 3 Nor. Sptd	1,500	7,500	12 2	_	-
rf. Rej. 4 Nor. Sptd	_	1,500	-		-
Sample Heated	5,000	14,500	06' - 00		-
Smutty 2 Northern	1,500	27,000	The Control of the Control		-
Smutty 3 Northern	_	4,500	-	-	_
Smutty 4 Northern	2,000	1,500		meigr	
C.W. Carnet	4,500	_	- Leve	2012	2.0
C.W. Garnet	3,000	-	-	Distance II	par .
L C.W.A.D.	6,000	THE AME	-		-
C.W.A.D	28,000	-	-	2,000	-
5 C.W.A.D	28,000	1,500	145,500	86,000	-
t C.W.A.D.	4,500	13,500	em	1,500	-
rf. 4 C.W.A.D.	2,000	1,545	-	_	-
Rej. 2 C.W.A.D.	_	1,500	_	-	-
f. Rej. 3 C.W.A.D. Sptd	1,500	3,000	- 5	_	_
Pf. Rej. 4 C.W.A.D. Sptd	1,500	1,500			-
Smutty 2 C.W.A.D.	3,000	3,000		100-12	
Smutty 3 C.W.A.D.	4,500	6,500	-	_	
of. Smutty 3 C.W.A.D.	-	3,000	-	-	-
rotal	925,493	712,545	174,000	116,500	7,500

GRAND TOTAL 1,936,038

TREIGHT ASSISTANCE SHIPMENTS

Shipments of wheat under the Freight Assistance Folicy recorded a decline during the month of December, although the total movement for the first five months of the crop year is about 76 per cent of the movement for the first five months of 1943-44. Chario exhibits the largest reduction from a year ago as a result of the much better wheat crop harvested in the province in 1944. The movement of coarse grains to Eastern Canada and British Columbia for feeding purposes has suffered a greater decline than has the movement of wheat.

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	991,121	776,668	78,282	128,815	46,601	362,562	2,384,049
September 1/	895,258	847,731	83,495	123,491	43,911	349,657	2,343,543
October 1/	875,880	672,520	85,496	119,506	29,307	328,680	2,111,389
November 1/	1,001,223	1,047,860	75,912	93,850	25,317	301,220	2,545,382
December	759,387	626,397	64,966	58,662	20,542	137,878	1,667,832
Total	4,522,869	3,971,176	388,151	524,324	165,678	1,479,997	11,052,195
Same Period 1943-44	6,980,042	4,397,636	484,422	702,010	295,012	1,647,364	14,506,486

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 five months of the present crop year and the other the corresponding period a year ago.

year ago.	August 1, 1944 to December 31, 1944	August 1, 1943 to December 31, 1943
	- to	ns -
Ontario	87,298	102,487
Quebec	120,988	118,617
New Brunswick	21,036	22,624
Nova Scotia	27,797	24,125
Frince Edward Island	4,917	6,856
Total	262,036	274,709

The following is the record of exports of wheat and wheat flour of Canadian origin during the past three crop years, showing the countries of final destination as nearly as can be determined under wartime conditions. The wheat export figures are clearances compiled by the Statistics Branch of the Board of Grain Commissioners, while the wheat-flour exports are those of the External Trade Branch of the Dominion Bureau of Statistics.

Country	1941-42	1942-43	1943-44 1/
	bu.	bu.	bu.
Great Britain and Northern Ireland	149,772,990 3,812,027	150,231,313	112,742,897 6,805,357
Aden	0,010,007	18,667	4,947
British East Africa	-	1,723	-
British South Africa	367,631	267,728	39,907 158,9 80
British West Africa	134,920 123,821	194,286 52,705	144,608
British India	-	-	593,734
Ceylon	-	-	93,360
Straits Settlements	46,949	1 101 501	1 007 107
British Guiana	891,06 4 6,857	1,181,701	1,023,187
British West Indies	7,868,676	7,299,483	6,848,941
Hong Kong	603,185		
Malta	-	øo .	1,575,635
Newfoundland	1,814,079	1,604,973	1,795,280
Palestine and Syria	2,000		
Total British Empire	165,444,287	164,619,421	131,843,033
Algeria			138,509
Belgian Colonies	33,759	24,559	20,007
Brazil	32,570	16,951	30,119
Central America (country unknown)	-	68,650	-
Colombia	231,839 341,970	46,391	181,903
Costa Rica	21,610	78,713	73,264
Cuba ,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	204,461	262,028	167,912
Dominican Republic	48,091	78,653	27,736
Ecuador	9,861 13,808,021	9,268,566	26,289 15,049,307
Europe (country unknown)	31,993	2,500,000	-
France	_	-	286,268
French Colonies	140,742	1,774,534	3,345,665
Greenland and Iceland	290,113	6,334,281 226,895	6,936,133 221,382
Guatemala	14,936	16,244	22,792
Haiti		4,972	12,542
Honduras	121,563	33,948	5,719
Iraq-Iran	2,315,440	1,541,594	502,215

Country	1941-42	1942-43	1943-44 1/	
Sound-andrew of the second of	bu.	bu.	bu.	
Italy			2,773,508	
Liberia	4,930	9,058	3,285	
Mediterranean Forts			380,266	
Mexico	450	9,072	-	
Morocco	5,067	en	6,089	
Netherlands Colonies	141,100	138,618	119,632	
Nicaragua	504	11,866	9,788	
Panama	14,243	39,236	35,347	
Peru	442,532		8,636	
Portugal	11,553,047	10,457,669	6,771,995	
Portuguese Colonies	584,614	758,142	209,113	
U.S.S.R	4,966,763	1,004,550	11,225,817	
Salvador	93,872	2,799	39,842	
San Domingo		35,878	52,556	
Spain	1,429,749	131,540	149,329	
Spanish Colonies	an	elb	4,059	
South America (country unknown)	12,907	-	376,619	
Switzerland	4,372,456	2,588,279	2,012	
Turkey	4354	148,100	-	
United States	18,633,429	14,861,753	160,704,451 2/	
Philippine Islands	205,838	-	-	
Puerto Rico	26	2,375	2,910	
Venezuela	275,677	105,567	362,177	
Total Foreign Countries	60,384,147	50,081,481	210,285,193	
Destination Unknown	25		1,627,094	
GRAND TOTAL	225,828,434	214,700,902	343,755,320	
	-			

^{1/} Preliminary and subject to revision.

The most significant change in the distribution of exports of Canadian wheat and flour during the crop year 1943-44 is the decreased proportion taken by Great Britain and Northern Ireland and the greatly increased share of wheat absorbed by the United States. Wheat flour shipments have been converted back to bushels of wheat at the rate of 4 1/2 bushels to the barrel of 196 pounds of flour.

The following table summarizes the percentage of the total shipments of wheat and wheat flour which went to the United Kingdom:

	Wheat		Wheat Flour
		- per cent -	
1941-42	71.5		46.2
1942-43	73.3		60.6
1943-44	30,6		43.9

^{2/} Exports of wheat and wheat flour to the United States include some 10 million bushels of wheat which were milled in bond and re-exported.

EXPORTS OF CANADIAN WHEAT AND FLOUR



Export clearance returns to the end of November indicate that about 101.7 million bushels of wheat and wheat flour had been exported from Canada during the first four months of the crop year. Exports for the first four months of the 1943-44 crop year totalled 97.0 million bushels so that, at November 30, 1944 our rate of exports of wheat and flour was running ahead of that of the preceding year.

Although complete export clearance data are not yet available for December and January, Customs data adjusted for changes in the stocks of Canada wheat in the United States indicate that exports of wheat and and wheat flour for the two months of December and January of this crop year will not exceed 37 million bushels. Exports for the months of December 1943 and January 1944 exceeded 55 million bushels.

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

Manual 1714	1944-45	1943-44	1942-43	1941-42	1940-41
1/25/1935	411		- bushels -	Wall of the second	SOURCE HERE
August	24,674,871 26,208,301 26,831,023 23,954,697	27,716,862 22,215,056 23,844,843 23,188,842 25,419,684 30,196,990 33,525,149 27,905,974 41,315,967 36,658,430 26,336,025 25,431,498	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 9,628,992 10,810,971 13,705,174 8,953,630 15,220,986 18,110,049 21,497,072 30,757,859 36,815,411 31,084,121 23,067,916
Crop Year Totals		343,755,320	214,700,902	225,828,434	231,206,246
Total for 4 Months August - November	101,668,892	96,965,603	55,180,793	68,014,929	45,699,202
4 Months' exports as % of Crop Year Total		28,21	25.70	30.12	19.76