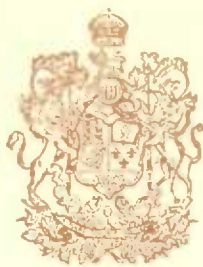


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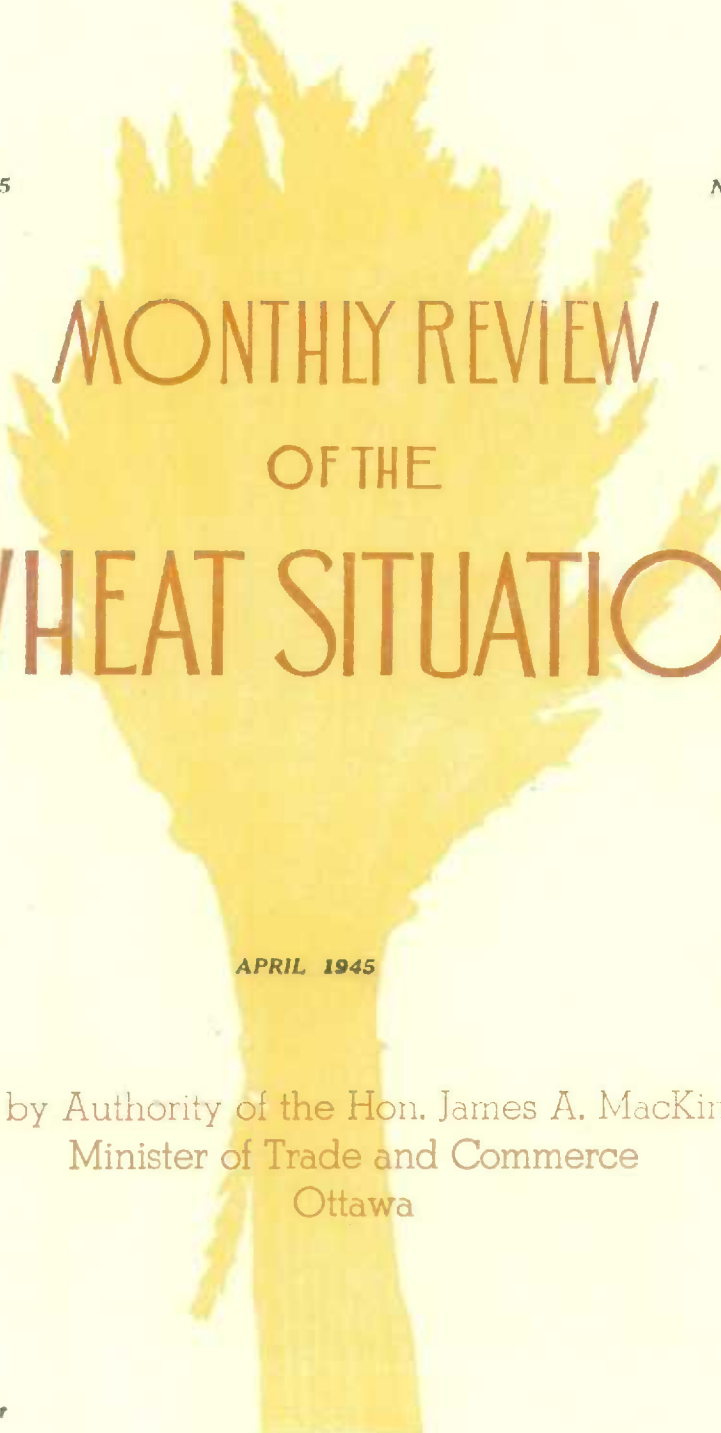


CANADA

DOMINION BUREAU OF STATISTICS
AGRICULTURAL BRANCH

Vol. 15

No. 8

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

APRIL 1945

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DOMINION BUREAU OF STATISTICS - CANADA
AGRICULTURAL BRANCH

(Issued April 1945)

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WORLD WHEAT SITUATION - SUMMARY

The concentration of the greater part of the world's wheat supplies in North America and the heavy demands which are now being made upon this stockpile have served to focus attention on the supply position of Canada and the United States. With only three months of the crop year remaining in Canada and, despite the determined effort which is being made to move the largest possible amount of wheat into export position, it does not now appear probable that the carry-over at July 31 will be less than 300 million bushels. The minimum carry-over likely in the United States at June 30 has been estimated at 350 million bushels. This prospective combined carry-over in the two countries of 650 million bushels, while only moderately below the 671 million bushels carried over in 1944, is still the lowest mid-summer stock figure since 1940.

Accumulated wheat reserves in North America increased, by virtue of near-record crops, to over a billion bushels in the summers of 1942 and 1943. The heavy use of wheat for live-stock feed and industrial uses in the United States and for feed and export in Canada had nearly halved these stocks by the close of the 1943-44 crop year. Now that domestic requirements are sloping off, the urgent need for bread grains to feed the peoples of liberated Europe promises to cut still further into accumulated reserves. The principal factor limiting the movement of wheat overseas at the present time is the relative shortage of rail and water transportation facilities.

A carry-over of 300 million bushels of wheat in Canada at the close of the present crop year would, if realized, still be larger than for any pre-war year and lends point to the Government's efforts to shift resources which have been used for the production of wheat to the growing of feed crops. Should the long-time average yield of 16 bushels per acre be realized on a seeded acreage of 21.5 million acres, as recommended by the Dominion-Provincial Conference, it would result in a crop of 344 million bushels and a probable total supply of at least 650 million bushels. This would be sufficient wheat to meet all foreseeable domestic demands and possible exports in 1945-46. The results of a survey of farmers' seeding intentions which will be available on May 9 will serve to remove a part of the uncertainty regarding Canada's wheat production in 1945.

In the United States the difference in seasons and the fact that 70 per cent of the wheat acreage is winter wheat permit a much more accurate assessment of the prospects for the new crop. The winter crop is now reported in excellent condition and, should normal weather conditions prevail for the balance of the growing season, a record outturn of over 860 million bushels will be harvested. A part of the 19 million acres which American farmers are expected to seed to spring wheat has already been drilled. Moisture conditions are favourable throughout the spring wheat belt, although cold weather and rains have delayed seeding in the more northern areas. The present outlook for these two crops adds up to a very favourable chance of the United States harvesting another billion bushel crop this season.

Snow, rain and subnormal temperatures have held up seeding across the grain-growing areas of the Prairie Provinces. Precipitation during April has been above normal over most of the agricultural area of Manitoba, in eastern and northern Saskatchewan and in northern and south-western Alberta. Seeding is not expected to become general in these areas until the beginning of the second week in May, but promises to be somewhat earlier in south-western Saskatchewan and southern Alberta.

A survey of wheat held on farms in Canada at March 31 shows farm stocks this year to be 154 million bushels as compared with 210 million bushels at March 31, 1944. The bulk of this wheat, 149 million bushels, is on farms in the Prairie Provinces with Manitoba farmers holding 14 million bushels, Saskatchewan 90 million and Alberta 45 million bushels. This survey also indicates that the use of wheat for feeding live stock has declined. Approximately 39.5 million bushels of wheat were fed during the first eight months of the present crop year as compared with 46.4 million bushels a year ago. These estimates do not include the 15 million bushels of wheat which had been moved by the end of February to the Eastern Provinces and to British Columbia to be used for feed under the Federal Freight Assistance Programme.

European Situation

It is reported that winter wheat is making satisfactory progress in most western European countries. The acreage seeded last fall was low as a result of unfavourable weather and military operations. An effort has been made to encourage increased seeding of spring wheat to offset this reduced acreage of winter wheat but total plantings are still thought to be well below the pre-war average.

Clear weather in the United Kingdom has permitted field work to proceed rapidly. Moisture supplies are adequate in most areas and the wheat plant has a good appearance. The trade has estimated the acreage seeded to wheat at about one-half million acres less than the 3.3 million acres which were planted last year. This would still be well above the pre-war acreage of 1.5 million acres and with normal yields will produce over 90 million bushels. Since the annual pre-war requirements of the United Kingdom were in the neighbourhood of 275 million bushels substantial imports will again be required in the coming crop year.

France has also enjoyed a favourable spring growing season but the reduced acreage seeded to wheat will prevent her from meeting her domestic requirements. Crop prospects in North Africa are poor again this year which will likely rule out imports from one of France's traditional sources of supply. Crop conditions are also reported as unfavourable in the Danubian countries with no exportable surplus in prospect.

An official estimate placed the 1945 crop in South Africa at 14 million bushels. Since requirements for the calendar year 1945 are placed at 20 million bushels the deficit is expected to be about 6 million bushels.

(April 30, 1945.)

CANADIAN WHEAT STOCKS ON MARCH 31, 1945

Stocks of Canadian wheat in all North American positions on March 31, 1945 were 503.0 million bushels as compared with 545.6 million bushels a year ago. Of this total 24.1 million bushels were held in bond in the United States. The bulk of the stocks in Canadian positions was held on farms and in country elevators in the Prairie Provinces. These data are furnished by the annual March-end survey of grain stocks made jointly by the Dominion Bureau of Statistics and the Board of Grain Commissioners.

Stocks of grain on farms amounted to 154 million bushels or 32 per cent of the total. This farm stock is below the 210 million bushels which were on farms on March 31, 1944. This 56 million bushel decline in farm stocks occurred despite a much better wheat crop in 1944, and the reduced use of wheat for live-stock feed. The immediate cause is to be found in the more generous delivery quotas which have been allocated to farmers in the Prairie Provinces during the present crop year.

Farm stocks of wheat in the Prairie Provinces accounted for 149 million bushels, with Manitoba's farm stocks estimated at 14 million bushels, Saskatchewan's at 90 million bushels and Alberta's at 45 million bushels. From this grain will be taken seed for the 1945 crop and feed for live stock and poultry for the April 1 to July 31 period, leaving the balance available for delivery or carry-over at July 31.

The estimated quantities of wheat used for feed in the province in which it was produced during the first eight months of the 1944-45 crop year indicate a substantial reduction as compared with the first eight months of the preceding crop year. About 39.5 million bushels of wheat were fed from August 1944 to March 1945, as compared with 46.4 million bushels during the similar period in 1943-44. The sharp decrease in the quantity of wheat fed in the Prairie Provinces has proved more than sufficient to offset the increase in the feeding of winter wheat in Ontario. Farmers in Ontario were able to feed more of their own wheat as a result of a more normal crop in 1944. These estimates of wheat used for feed exclude the 15 million bushels of western wheat which had been moved to the eastern provinces and to British Columbia up to the end of February under the Federal Freight Assistance Policy.

Location of Stocks

	<u>Bushels</u>
On Farms	154,236,000
Country and Private Terminal Elevators	180,114,413
Western Mills and Mill Elevators	5,801,198
Interior Terminal Elevators	13,719,309
Vancouver-New Westminster Elevators	16,447,877
Victoria & Prince Rupert Elevators	2,019,584
Churchill Elevator	1,877,787
Fort William—Port Arthur Elevators	57,225,401
In Transit - Lakes	1,060,439
In Transit - Rail	8,533,986
Eastern Elevators	34,698,121
Eastern Mills	3,167,470
Total in Canada	<u>478,901,585</u>
Canadian Wheat in United States	24,078,406
Canadian Wheat in Canada and United States	<u>502,977,991</u>

Comparative Stocks, March 31, 1944 1/

In Canada	531,648,434
In United States	14,001,109
Total in Canada and United States	<u>545,649,543</u>

1/ Revised.

CHICAGO WHEAT FUTURES

Chicago May futures advanced from a close of \$1.68/3 on March 26 to a close of \$1.75/5 on April 12. The market has been strengthened by the prospective heavy demand for wheat and flour in liberated Europe and the Army's wheat and flour export program. The persistent shortage of cars available for the movement of grain from farms to mills and terminals has caused a heavy drain on visible supplies and thus placed a premium on wheat which is in a deliverable position. The trade seemed inclined to ignore the bearish aspect of the official crop report which indicates the likelihood of a record breaking winter wheat crop. The end of hostilities in Europe is not expected to have a prolonged bearish influence on markets since the extraordinary demand for imported food in Europe will continue.

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 eighths per bushel)				
March 26	168/3	155/7	151/4	151/2
27	168/4	156/1	152	151/7
28	169/1	156/3	152/1	152
29	170/2	157/1	152/7	152/4
30			Good Friday	
31	170/5	157/4	153	152/4
April 2	172/1	159/4	154/6	153/5
3	171/2	158/6	154/2	153/5
4	171/4	159/1	154/4	153/7
5	171/5	158/4	153/5	153
6	172/3	159/1	154/6	153/6
7	173/2	159/4	156	155/1
9	173/3	160	155/6	154/6
10	173/5	160	155/4	154/4
11	174/7	160/4	155/3	154/3
12	175/5	164/2	157/4	156/3
13	174/5	164	156/5	155/4
14		Market Closed		
16	175/2	165/6	157/7	156/7
17	174/6	164/6	157/4	156/3
18	173/7	163/7	157/3	156/4
19	172/2	162/1	156/4	155/5
20	172/3	160/5	155/6	155/3
21	172/4	161/1	156/2	156
23	173/4	162/1	156/3	155/6
24	174/5	164	157/7	157/1
25	174/1	163/2	157/4	156/6

CENTS
PER
BUSHEL

160

150

140

130

120

110

100

90

80

APR.

MAY

JUNE

JULY

AUG.

SEPT.

OCT.

NOV.

DEC.

JAN.

FEB.

MAR.

APR.

No. 1 Man. St. John

Australian

Argentine Rosafé

New Crop

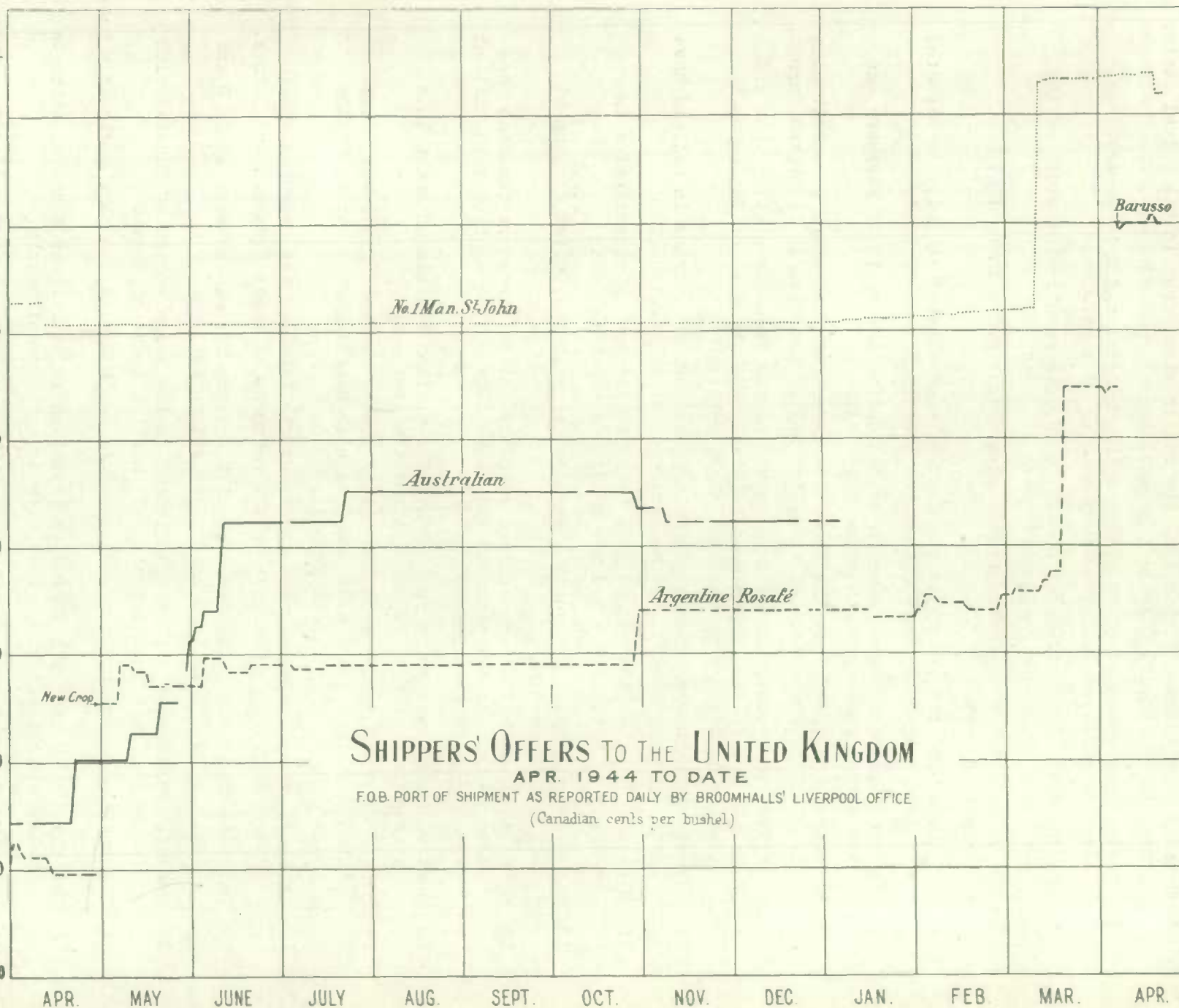
Barusso

SHIPPERS' OFFERS TO THE UNITED KINGDOM

APR. 1944 TO DATE

F.O.B. PORT OF SHIPMENT AS REPORTED DAILY BY BROOMHALLS' LIVERPOOL OFFICE

(Canadian cents per bushel)



CALENDAR OF WHEAT EVENTS

- April 2 Present conditions indicate that the winter wheat crop in the United States may yield a record 863 million bushels.
- 3 The total acreage seeded to wheat in the United Kingdom is expected to decline this year despite heavy seeding of spring wheat.
- 4 General rains in Spain are expected to improve greatly the yield of the new crop which has now headed out.
- 5 The United States is again permitting American ships to call at Argentine ports.
- 6 The outturn of the new wheat crop now being harvested in India is expected to be considerably better than the subnormal crop of 1944.
- 7 The production of wheat flour in Canada during the month of February was the lowest for any month since July 1944.
- 9 UNRRA has announced that the Argentine government is making a contribution of 5.5 million bushels of wheat for relief purposes in liberated Europe.
- 10 Transport Controller Lockwood is quoted by the Press as stating that 460 million bushels of wheat must be moved from the Head of the Lakes to Eastern Canada during the next eight months.
- 11 Reports from Europe indicate that large agricultural areas in Holland have been severely damaged by the admission of salt water.
- 12 Reserves of subsoil moisture have been replenished by recent rains in Argentina and farmers are now seeding a new wheat crop.
- 13 A revised estimate places the 1944 wheat crop in the United Kingdom at 117.1 million bushels.
- 14 Canadian grain may not be shipped into the United States in Canadian cars except with the exception of shipments originating west of Fort William and consigned to Duluth.
- 16 Australia is expected to feed about 38.5 million bushels of wheat this year as compared to 60 million bushels last year.
- 17 Stocks of wheat on farms in the United States at March 31 is estimated at 239 million bushels as compared with Canadian farm stocks at the same date of 239 million bushels.
- 18 In order to insure sufficient stocks at the Lakehead the Canadian Wheat Board is giving preference to the movement of wheat from country points.
- 19 Lakehead wheat stocks declined by 15.5 million bushels between April 5 and April 19 as a result of heavy lake shipments.
- 20 Subsoil moisture is reported deficient in the Volga region of Russia, which in pre-war days included about 20 million acres of wheat.
- 21 Broomhall reports that crop prospects in North Africa are poor again this year.
- 23 The wheat crop in South Africa is estimated at 14 million bushels, which is about 6 million bushels less than domestic requirements.
- 24 During the second week of April 4.4 million bushels of wheat were moved by vessel from Fort William to Buffalo.

UNITED STATES

bushels

In an April first release the Crop Reporting Board of the United States Department of Agriculture assessed national crop prospects as excellent. Wheat came through the winter well in nearly all important winter wheat States. Good snow cover in most areas furnished adequate protection and held winter acreage losses to the lowest level in twenty-five years. A record crop of 862.5 million acres is forecast for this year. This estimated production is based upon conditions prevailing up to April 1 and assumes normal conditions for the balance of the growing season. Should a crop of this size be realized it would be nearly 100 million bushels above that of last year and 37 million bushels above the previous record—the crop of 1931. In view of the excellent prospects for winter wheat, a total wheat crop of over a billion bushels in 1945 seems fairly well assured.

Stocks of wheat on farms in the United States at April 1 were estimated at 239.1 million bushels as compared with 219.7 million bushels a year ago and the 1933-42 average of 163 million bushels. Current farm stocks are equivalent to about 22 per cent of the record 1944 production.

The use of wheat for live-stock feed in the United States continues to decline. In 1942 the Commodity Credit Corporation sold 103 million bushels of wheat for feed; in 1943 sales increased fourfold to 420 million bushels and in 1944 declined to 224 million bushels. Much of this wheat was imported duty free from Canada by the Corporation. Sales of government wheat during the first quarter of 1945 have been reduced still further and with the exception of one Pacific area no allocation is being made for the month of April. The difficulty experienced in obtaining transportation facilities and the availability of other feedstuffs has been responsible for this decision.

A reduction of one cent per bushel in the flour export subsidy for Pacific Coast mills has been made by the C.C.C. This reduction was an apparent reflection of lower wheat values in that area in comparison with the price of Canadian wheat. The current subsidy rates are 34 cents per bushel on wheat to be ground into flour for export by water from Atlantic and Gulf ports; 26 cents for export by water from Pacific ports, and 6 cents for export by rail to Canada or Mexico. Total export sales of wheat under this subsidy plan up to April 13 amounted to the equivalent of 9.1 million bushels of wheat. Most of this flour was consigned to Cuba, Central and South America.

The shortage of boxcars remains a serious problem in moving wheat to mills, and flour and wheat into export position. Thus, although there is no wheat shortage in the United States, there is a shortage of wheat in mills and at terminal markets and this latter factor has exerted a bullish influence on the price of the May future.

The bill extending the life of the Commodity Credit Corporation to June 30, 1947 has been passed. This bill also increases the borrowing power of the Corporation from 3 to 4 3/4 billion dollars. This organization is, therefore, placed in a position to implement the Government's guarantee that the prices of the basic farm commodities will be supported at not less than 90 per cent of parity for at least two years after the cessation of hostilities.

Estimates from the various States on that date were for deliveries to the Board totalling 60 m. bushels. The Board took the view however, that safety must have first consideration, and therefore used the lower figure of 40 m. bushels in its calculations. At this time Australia had been made the source of supply for Allied needs of wheat and flour in the Eastern Mediterranean, the Middle East, India, Ceylon and U.S. Forces in S.W. Pacific, New Zealand and the Pacific Islands. When therefore, the London Food Council were informed that we must drastically curtail shipments shipping plans made for six months ahead were upset. The Board was asked to reconsider its figures on the grounds that they were unduly pessimistic. As, in the meantime, there had been no alleviation of the drought, the Board was unable to depart from its decision. Unfortunately, a food crisis occurred in India, and as a matter of high policy, nearly 6 m. bushels were supplied to that destination in excess of the export figures previously decided upon by the Board. The budget prepared by the Board on the 6th July 1944 took into consideration that the consumption of wheat within Australia for all purposes for the year 1943 was 55 3/4 million bushels. It budgetted for an increase up to 71 1/2 million bushels for the year 1945, but decided to retain an additional 20 million bushels as a reserve for contingencies. In effect therefore, the Board allowed for more than a 60% increase in consumption within Australia. This allotment for internal use in 1945 and the reserve for contingencies left 31 million bushels of wheat for export as wheat or flour, if the deliveries of wheat by growers from the 1944-45 harvest totalled 40 million bushels, or 51 million bushels if deliveries from growers were equal to the then current estimate of 60 million bushels. The Board decided to limit export sales to 15 m. bushels until the crop was assured. Unfortunately, there were heavy demands for operational areas, and urgent needs in the countries obtaining supplies from Australia which could not be satisfied in time from other sources of supply. In addition, the demand for stockfeed increased by leaps and bounds until it became evident that unless prompt action was taken, not only would the whole of the 31 million bushels be used, but the reserve of 20 million bushels would also disappear. Representations were made to the Government in the 1st week of December 1944, and certain overseas commitments were cancelled, and a rearrangement of sources of supply for Allied Forces was made. Railage difficulties in Western Australia and Victoria were also examined, and measures decided upon to improve haulage in Western Australia, and to relieve Railways in Victoria. The Board held with determination not to reduce its stocks for 1945 use below the 91 1/2 million bushels agreed to in July 1944. Deliveries to the Board by growers were 38 1/2 million bushels instead of 40.1 m. bushels, upon which the Board's estimates were based, and the actual quantity available for 1945 is 89 m. bushels, excluding 14 1/2 m. bushels committed for export as aforementioned, or 2 1/2 million bushels less than planned.

During December 1944, two facts became apparent, firstly that many wheat growers were holding back wheat for eventualities, and secondly that either stockfeeding had increased to a rate equivalent to a consumption of over 60 m. bushels per annum, or feeders were buying heavily to build up reserves. It must be appreciated that the Board has neither the knowledge nor the power to determine which class or classes of users are most essential to Australia's wartime economy. That determination can only be made by the Government, which alone has a complete knowledge of Australia's needs. Realizing however, that some lead must be given to enable prompt action to be taken, the Board recommended that wheat should be supplied to users on the basis of the first nine months of 1944, but that some wheat should be held in reserve to meet necessitous cases of those who would otherwise be excluded from supplies. This was approved by the Government for the period to the end of February 1945, and the Government proposed to ask the State Governments to co-operate in arranging for distribution and the allotment of quotas in their respective States. The Board's proposal had the merit of insuring that regular users of wheat could obtain their share of the available wheat, and the reserve would take care of part of the disabilities caused by drought, and also of those who had commenced poultry or pig raising after September 1944.

UNITED STATES

bushels

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ARGENTINE LETTER

The correspondent of the Dominion Bureau of Statistics in Buenos Aires has forwarded the following report under date of April 10, 1945:

Crop Conditions

The monthly crop report of the Ministry of Agriculture made its appearance this morning, bringing good news with regard to conditions in the rural districts, owing largely to the excellent subsoil moisture, which has permitted an early start to be made with work on the land in preparation for crop planting. The report stresses the fact that during the month of March general rains fell throughout the country, benefitting the fields of late-planted maize and the rice crop.

Preparation of the lands which are to be planted to wheat and linseed was begun and work was continued on fields which are to be used for winter cereals. Owing to the excellent condition of the soil, planting of forage crops is proceeding actively. Harvesting of rice has commenced, and that of maize is proceeding normally. The Sorgo crops, the pastures of natural grass and alfalfa are generally in good shape, providing excellent feed for live stock. The threshing of wheat has been finished throughout the country and locally the preparation of the seedbed for the next planting has begun and is proceeding normally, owing to the rains which have fallen.

Supplies and Markets

During March there was a little more activity in the market than in the preceding months, due largely to the fact that the United Kingdom resumed purchasing and acquired a number of parcels. Brazil also, always active, bought more heavily than usual, and other South American countries continued their normal course of acquiring supplies of Argentine wheat, much of it needed for mixing with the inferior local grain. There was a good deal of wheat in movement from the ports, something over 7,348,620 bushels sailing during the month, much of it for Spain and other European countries.

With the change in the international situation, there is an optimistic feeling in the grain trade with regard to the future movement of Argentine seeds and grains, a greater supply of boats being anticipated. A recent statement of stocks of grains in the country issued by the National Grain & Elevator Board shows stocks of wheat totalling 218,167,006 bushels, of which 87,916,869 bushels are said to be of the new crop.

In the statistical statement contained in my last monthly report, bearing the date of March 14, the balance of wheat still available for export was given as 197,670,860 bushels.

AUSTRALIAN CABLE

The Canadian Trade Commissioner at Melbourne cabled on April 18 regarding the wheat and flour situation in Australia as follows:-

"Australian wheat stocks at the end of March totalled 64 million bushels. The only area which has had opening rains so far is the North of New South Wales though it is not unusual in wheat areas for the season to break until the end of April or early May. The quantity of wheat to be released for feeding live stock during April will be slightly below the quantity released for March. Flour mills in Victoria and New South Wales are working only one shift owing to wheat shortage but in South Australia and Western Australia where wheat stocks are relatively greater mills are operating to capacity although reduced operations are expected."

REVIEW OF AUSTRALIAN SUPPLY POSITION

The following statement which was released by the Australian Wheat Board has been reprinted in full since it contains a detailed analysis of the wheat supply position in Australia:-

In the early days of war, there was considerable free shipping tonnage in the World, and although competition for vessels was keen, the Board was able to sell wheat reasonably well. This is exemplified by the fact that although the 1939-40 harvest was a record, from which the Board received 195 1/2 million bushels in addition to about 18 m. bushels carried over from the pre-war harvest, only 25 m. bushels remained unsold at the end of 1940. The entry of Japan and America into the war changed conditions immediately. Not only were many of our important markets lost, but shipping became strictly controlled throughout the world. An Anglo-American organization was set up which decided the sources from which all supplies were to be obtained by the various countries of the world. Because of Australia's isolation, we suffered in comparison with a country like Canada, and disposal of our wheat and flour became more of a goodwill gesture on the part of Great Britain, than of shipping considerations. As a result, the quantity of wheat we were able to export was strictly limited, and serious storage difficulties were encountered.

By this time, Australia had become the food supply centre for troops fighting Japan in the S.W. Pacific, and among other things, dairy products, eggs and pig meats were badly wanted. With huge stocks of wheat and no prospect of shipping for some time, the Government decided to make wheat available to stockfeeders at a very cheap price. This had the desired effect of stimulating poultry and pig raising, which has taken a large quantity of wheat from the Board's stocks. About September-October, 1943, the whole position changed. Australia's wheat and flour became in urgent demand, and the difficulty was to get it to the ports and to load the ships fast enough. Evidence from official sources overseas was to the effect that this demand would continue for 2 years at least. The Board thereupon addressed a memorandum to the Government on the 6th December 1943, on the need for increasing the production of wheat. The Government investigated the position very fully, but found that it was impossible to obtain additional superphosphate, and that manpower was at its most critical stage and could not be released to wheat growers. It was decided therefore, to concentrate upon increased production in the following year, and as a result of special representations in London and Washington, the Government has been able to increase materially the importation of phosphatic rock during 1944, resulting in a larger ration to wheat growers for 1945 planting.

The overseas demand has continued throughout 1944, but when it became evident that drought was impending, the Board was forced to reconsider the export programme. A report of the Board dated 6th July 1944 commences as follows:-

"The growing season so far has not been propitious and fears have been expressed that yields may be as low as those of 1940-41. Under such circumstances, deliveries to the Board may be -

Queensland	2.7 m. bushels	(Actual deliveries were	6 m.)
New South Wales	11.5 m. "	" "	12 m.
Victoria	7 m. "	" "	1 m.
South Australia	9.4 m. "	" "	6.5 m.
Western Australia	9.5 m. "	" "	13 m.
TOTAL	40.1 m. bushels		38.5 m. bushels"

Estimates from the various States on that date were for deliveries to the Board totalling 60 m. bushels. The Board took the view however, that safety must have first consideration, and therefore used the lower figure of 40 m. bushels in its calculations. At this time Australia had been made the source of supply for Allied needs of wheat and flour in the Eastern Mediterranean, the Middle East, India, Ceylon and U.S. Forces in S.W. Pacific, New Zealand and the Pacific Islands. When therefore, the London Food Council were informed that we must drastically curtail shipments shipping plans made for six months ahead were upset. The Board was asked to reconsider its figures on the grounds that they were unduly pessimistic. As, in the meantime, there had been no alleviation of the drought, the Board was unable to depart from its decision. Unfortunately, a food crisis occurred in India, and as a matter of high policy, nearly 6 m. bushels were supplied to that destination in excess of the export figures previously decided upon by the Board. The budget prepared by the Board on the 6th July 1944 took into consideration that the consumption of wheat within Australia for all purposes for the year 1943 was 55 3/4 million bushels. It budgetted for an increase up to 71 1/2 million bushels for the year 1945, but decided to retain an additional 20 million bushels as a reserve for contingencies. In effect therefore, the Board allowed for more than a 60% increase in consumption within Australia. This allotment for internal use in 1945 and the reserve for contingencies left 31 million bushels of wheat for export as wheat or flour, if the deliveries of wheat by growers from the 1944-45 harvest totalled 40 million bushels, or 51 million bushels if deliveries from growers were equal to the then current estimate of 60 million bushels. The Board decided to limit export sales to 15 m. bushels until the crop was assured. Unfortunately, there were heavy demands for operational areas, and urgent needs in the countries obtaining supplies from Australia which could not be satisfied in time from other sources of supply. In addition, the demand for stockfeed increased by leaps and bounds until it became evident that unless prompt action was taken, not only would the whole of the 31 million bushels be used, but the reserve of 20 million bushels would also disappear. Representations were made to the Government in the 1st week of December 1944, and certain overseas commitments were cancelled, and a rearrangement of sources of supply for Allied Forces was made. Railage difficulties in Western Australia and Victoria were also examined, and measures decided upon to improve haulage in Western Australia, and to relieve Railways in Victoria. The Board held with determination not to reduce its stocks for 1945 use below the 91 1/2 million bushels agreed to in July 1944. Deliveries to the Board by growers were 38 1/2 million bushels instead of 40.1 m. bushels, upon which the Board's estimates were based, and the actual quantity available for 1945 is 89 m. bushels, excluding 14 1/2 m. bushels committed for export as aforementioned, or 2 1/2 million bushels less than planned.

During December 1944, two facts became apparent, firstly that many wheat growers were holding back wheat for eventualities, and secondly that either stockfeeding had increased to a rate equivalent to a consumption of over 60 m. bushels per annum, or feeders were buying heavily to build up reserves. It must be appreciated that the Board has neither the knowledge nor the power to determine which class or classes of users are most essential to Australia's wartime economy. That determination can only be made by the Government, which alone has a complete knowledge of Australia's needs. Realizing however, that some lead must be given to enable prompt action to be taken, the Board recommended that wheat should be supplied to users on the basis of the first nine months of 1944, but that some wheat should be held in reserve to meet necessitous cases of those who would otherwise be excluded from supplies. This was approved by the Government for the period to the end of February 1945, and the Government proposed to ask the State Governments to co-operate in arranging for distribution and the allotment of quotas in their respective States. The Board's proposal had the merit of insuring that regular users of wheat could obtain their share of the available wheat, and the reserve would take care of part of the disabilities caused by drought, and also of those who had commenced poultry or pig raising after September 1944.

The Board is receiving many applications for wheat for starving sheep, and has asked the Government to consider an allocation for this purpose which will at least carry such sheep for a few weeks until the sheep men can make other arrangements. On the figures available, it seems clear that any poultry or pig raiser who proposes to increase the number of his stock would be well advised to plan at most for replacements only.

Exports for 1945 - There will be no further exports of wheat during the year. All that has been shipped to date has been such Allied needs as were inescapable although the Board was successful in cancelling shipments of several million bushels of wheat, and in another case of substituting flour for wheat, so that the offals would remain in Australia. Flour shipments being made are the balance of a contract made in February 1944, with the British Ministry of Food, and which are urgently required for destinations other than the U.K.

Export of Wheat from N.S.W. & Victoria - Some criticism has been levelled at the Board for exporting wheat from N.S.W. and Victoria. At the end of February 1944, there were 57 m. bushels of wheat in N.S.W. Only 255,000 bushels were exported as wheat although "the trade" and others in Sydney urged the Board to export wheat to clear the Sydney and Newcastle silos. This the Board refused, and the small quantity shipped was in special small parcels for a particular assignment. At the end of February 1944, there were 47 3/4 million bushels in Victoria, of which only about 1 1/4 million bushels were exported as wheat. Heavy exports of flour were made from these States with the specific object of providing bran and pollard for stock raisers.

Imports - The Government has authorized the importation of a quantity of maize but a recent statement declared that the waging of wars in two hemispheres was making shipping more difficult than ever. Our enquiries disclose that beyond a few odd cargoes, there is little hope of importing the quantities authorized by the Government at an early date.

Interstate Transfer of Wheat - The Board has arranged under Government authority to ship wheat from South and Western Australia to the other four States. Earlier shipments could not be made because Port & Railway facilities in those two States were taxed to the utmost to ship the wheat so urgently required in India for human consumption. As soon as that wheat had gone, the Board switched to Interstate shipments. To ensure greatest possible expedition the Government arranged for special Railway engines to be sent to Western Australia to help in the heavy transport required in that State.

From the foregoing it will be seen that the Government and the Board were faced with the uncertainty of the season, which in Queensland and Western Australia turned out satisfactorily, but in other States the reverse. Had early action been taken against stockfeeding and the season improved in New South Wales, Victoria and South Australia, as in the other two States, the accusation could have been made that the Board had suffered from panic and caused heavy losses to stockfeeders and limited supplies of dairy produce, eggs and pig meat to the Forces and the United Kingdom. There is no longer any uncertainty, and unfortunately the fact that stock-feeding must be limited must be faced.

SELLING PRICES OF CANADIAN WHEAT

The Class 2 price of Canadian wheat continued its generally upward trend during the month of April. During the second week of the month No. 1 Northern was selling at \$1.54 per bushel which is the highpoint since the beginning of quotations in October 1943.

The monthly averages of the Class 2, or price to non-mutual aid countries, are as follows with daily quotations for the month of April:

Canadian Wheat Board Prices

	<u>1 Northern</u>	<u>2 Northern</u>	<u>3 Northern</u>	<u>4 Northern</u>
	(cents and eighths per bushel)			
October 19-30, 1943	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
January, 1944	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
January 1945	145/6	142/6	140/6	
February	150/1	147/1	145/1	
March	152/3	149/3	147/3	
April 2	153	150	148	
3	153	150	148	
4	154	151	149	
5	153	150	148	
6	153	150	148	
7	154	151	149	
9	154	151	149	
10	154	151	149	
11	154	151	149	
12	154	151	149	
13	154	151	149	
14		market closed		
16	154	151	149	
17	154	151	149	
18	154	151	149	
19	154	151	149	
20	154	151	149	
21	153	150	148	
23	153	150	148	
24	154	151	149	

CANADIAN SUPPLY POSITION

Canada's supply of wheat at April 1, available for export/and or carry-over at July 31, 1945 amounted to 453.8 million bushels as compared with 484.8 million bushels at April 1, 1944.

During the first eight months of the crop year total exports of wheat and wheat flour have totalled about 177 million bushels as compared with 214 million bushels for the first eight months of 1943-44. The clearances overseas have been increased by about 25.5 million bushels but the decline in exports to the United States has more than offset this gain.

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-March 31 .	139.0 ^{1/}	177.9
Flour Exports in terms of wheat August-March 31	37.8	36.1
Total Exports Wheat and Flour	176.8	214.0
Balance on April 1 for export or carry-over	453.8	484.8

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

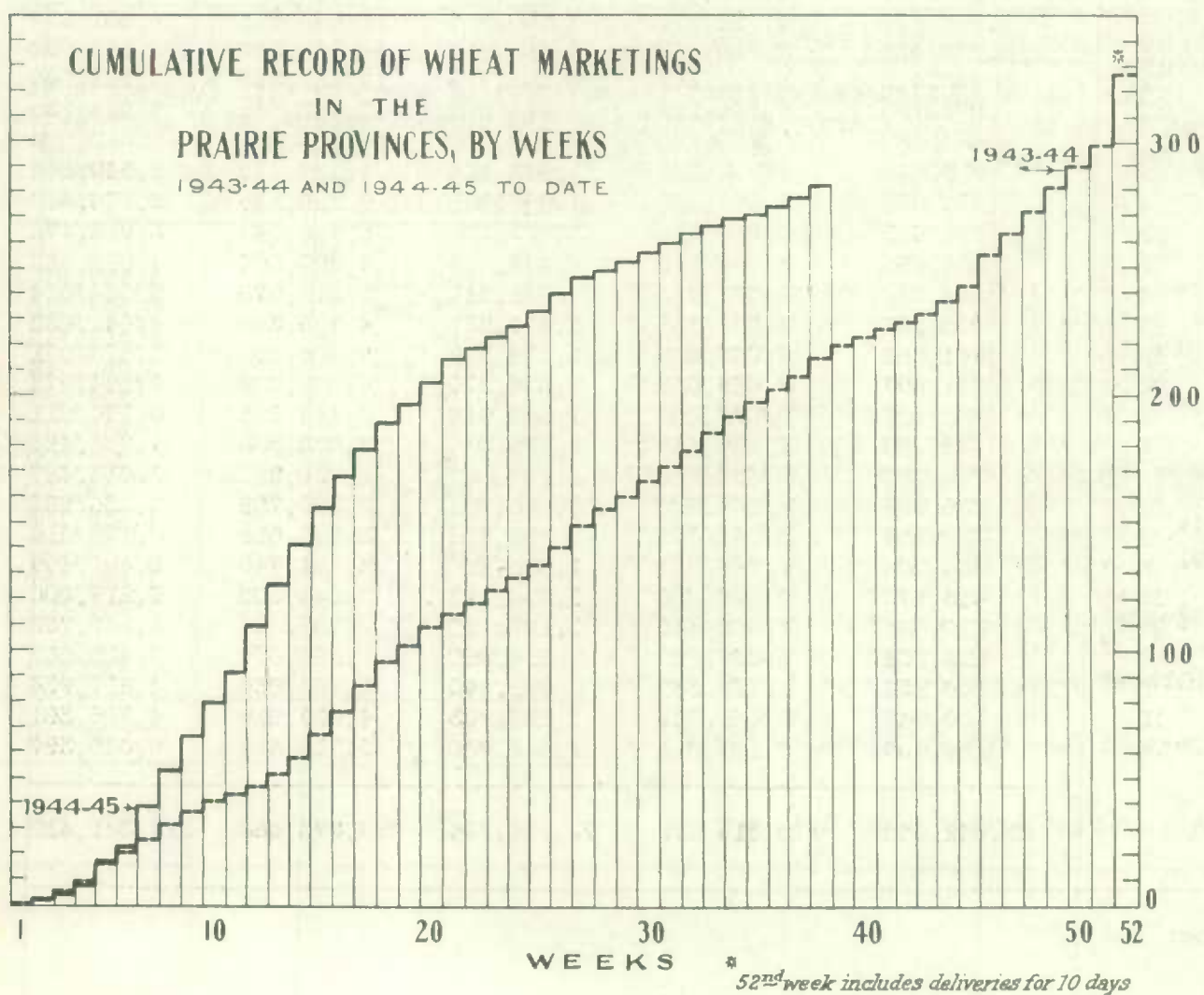
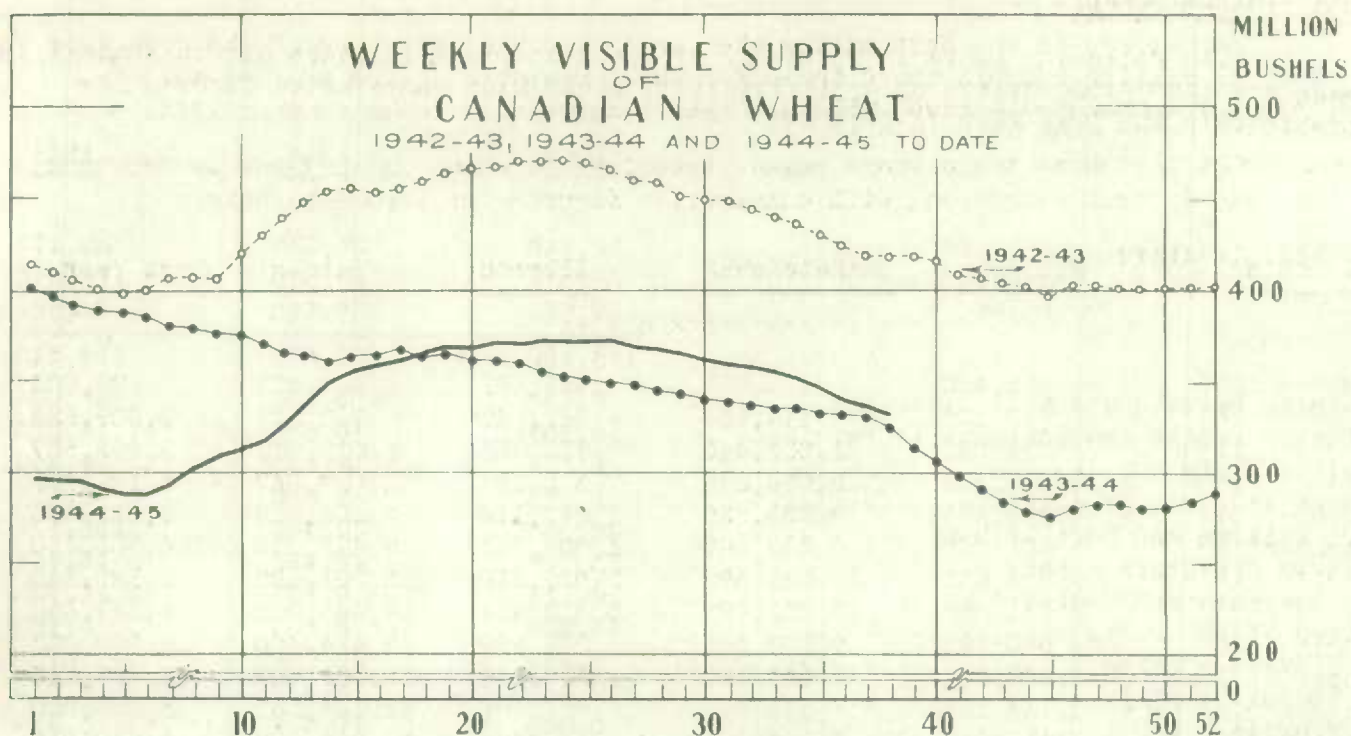
FARMERS' MARKETINGS IN THE PRAIRIE PROVINCES

Marketings in the West during the first thirty-eight weeks of the crop year are about 44 million bushels above those for the comparable period in 1943-44. Deliveries since January 1 have, however, been consistently lower than in 1944.

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:

<u>Week ending</u>	<u>Manitoba</u>	<u>Saskatchewan</u>	<u>Alberta</u>	<u>Totals</u>	<u>Last Year</u>
- bushels -					
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	1,025,622	2,776,348	885,577	4,687,547	4,172,199
31	2,296,542	3,955,228	1,077,113	7,328,883	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	1,622,464	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	442,566	2,081,195	991,812	3,515,573	5,384,524
11	705,136	2,557,353	1,476,836	4,739,325	4,646,835
18	941,862	4,043,588	2,219,758	7,205,208	5,578,271
25	871,897	3,688,031	1,830,810	6,390,738	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	228,393	1,267,315	1,033,051	2,528,759	5,530,995
March 1	322,352	2,144,288	1,331,418	3,798,058	6,195,310
8	354,203	1,789,011	1,081,526	3,224,740	5,491,499
15	413,972	2,196,220	1,334,113	3,944,305	6,219,006
22 1/	197,923	1,460,345	1,101,125	2,759,393	6,145,755
29	112,104	1,266,725	814,410	2,193,239	7,405,567
April 5	108,252	1,709,343	951,240	2,768,835	4,817,954
12	188,942	3,151,344	1,357,703	4,697,989	4,705,501
19	150,466	2,105,214	1,462,730	3,718,410	6,045,597
T o t a l	35,641,058	173,516,076	73,916,334	283,073,468	214,341,418

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 April 19, 1945, along with comparative figures for approximately the same date in 1944 and 1943:

	<u>1945</u>	<u>1944</u> (000 bushels)	<u>1943</u>
Country Elevators - Manitoba	18,240	23,830	30,175
Saskatchewan	87,570	93,850	118,090
Alberta	67,380	69,195	76,350
T o t a l	173,190	186,875	224,615
Interior Private and Mill Elevators	5,452	5,234	5,004
Interior Public and Semi-Public Terminals ...	14,259	10,832	16,374
Pacific Ports	18,509	13,645	19,434
Churchill	1,878	1,878	2,617
Fort William and Port Arthur	40,256	37,440	100,176
Eastern Elevators - Lake Ports	23,788	12,452	16,468
St. Lawrence and Seaboard Ports	16,114	9,822	15,639
United States Ports	15,805	9,689	5,485
In Transit - Lakes	5,443	10,091	-
In Transit - Rail	12,968	15,917	8,016
In Transit - U.S.A.	5,263	10,259	3,814
T o t a l	332,925	324,134	417,642

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 April 19, 1945</u>	<u>August 1, 1943 to April 20, 1944</u>
	- bushels -	
Collingwood	3,055,111	1,227,979
Midland	8,285,504	8,334,912
Owen Sound	3,553,052	1,403,714
Port McNicoll	10,002,705	6,280,764
Goderich	1,199,618	859,437
Sarnia	1,007,021	463,919
Port Colborne	29,932	326,820
Kingston	1,043,408	14,700
Prescott	1,088,499	1,257,168
Montreal	1,448,625	3,097
Sorel	139,795	1,877,969
Three Rivers	159,000	701,037
Quebec	1,259,787	-
Depot Harbour	-	255,700
Total Eastern Lake and St. Lawrence Ports ...	32,272,117	23,007,216
Fort William-Port Arthur, Aug. 1 to Mar. 31 .	477,782	6,835,922

DELIVERY QUOTAS ON WHEAT

Quota restrictions on the delivery of wheat have now been relaxed to the point where deliveries are practically on an open basis. Only 19 points in Saskatchewan, 23 in Alberta and 4 in British Columbia are still subject to a limitation. On April 6 an open delivery quota on oats was authorized at all points. Between April 16 and April 19 the Canadian Wheat Board required country elevators to ship two carlots of wheat for each carlot of oats or barley consigned to the Lakehead.

The summary of the quota position in all the western provinces, compiled by the Canadian Wheat Board as at April 11, 1945, is shown below:

Delivery Quota	Manitoba		Saskatchewan		Alberta		British Columbia	
	Points	%	Points	%	Points	%	Points	%
10 bushels	-	-	-	-	1	1	-	-
15 bushels	-	-	10	1	12	2	-	-
20 bushels	-	-	9	1	10	1	-	-
Open Quota	368	100	1,108	98	570	96	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 37th 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
10 bushels per "authorized" acre .	1	-	15	1
14 bushels per "authorized" acre .	-	-	91	4
15 bushels per "authorized" acre .	22	1	-	-
18 bushels per "authorized" acre .	-	-	1,986	95
20 bushels per "authorized" acre .	19	1	-	-
Open Quota	2,050	98	-	-
T o t a l	2,092	100	2,092	100

WHEAT SHIPMENTS TO THE UNITED STATES

About 8.3 million bushels of Canadian wheat have moved into the United States since the opening of navigation on the Lakes. The great bulk of these shipments has been consigned to the port of Buffalo and bring total shipments to the United States since August 1 to 90.1 million bushels. Comparable shipments in 1943-44 were 147.4 million bushels.

Approximately 118.4 million bushels of Canadian wheat have been retained for consumption in the United States as compared with 36.5 million bushels imported for stock feed during the first 9 months of 1943-44. The remainder of this wheat has been re-exported overseas or is still held in store or in transit in the United States.

Shipments August 1 to April 19

	<u>1945</u>	<u>1944</u>
	- bushels -	
<u>By Vessel</u>		
U.S.A. Pacific Ports	1,093,915	14,470,115
U.S.A. Atlantic Ports	-	740,219
Buffalo	46,130,327	54,158,717
Chicago	7,746,957	4,959,756
Duluth-Superior	5,479,526	15,775,424
Erie	8,617,697	9,297,820
Milwaukee	677,554	266,646
Ogdensburg	-	557,137
Oswego	1,833,013	963,644
Toledo	4,829,371	3,070,874
 <u>By Rail</u>		
Seaboard Ports	12,445,061	14,619,205
Other Points	1,274,107	28,516,992
 T o t a l	90,127,528	147,396,549

RAIL MOVEMENT FROM FORT WILLIAM-PORT ARTHUR

The eastward movement of wheat by rail from the Lakehead increased to over a million bushels during March and to a level comparable to that of March 1944.

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

	<u>1944-45</u>	<u>1943-44</u>	<u>1942-43</u>	<u>1941-42</u>
	- 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	1,936,038	4,364,158	1,757,163	1,781,993
February	764,629	4,397,318	3,196,248	1,436,455
March	1,091,909	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

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

	Ontario	Quebec	New Brunswick	Nova Scotia	Prince Edward Island
	- bushels -				
1 Northern	124,800	-	-	-	-
2 Northern	107,933	42,267	-	-	-
3 Northern	65,833	-	-	-	-
4 Northern	73,134	27,000	1,500	1,500	1,500
No. 5	127,166	114,000	10,500	-	1,500
No. 6	13,500	27,000	-	-	1,500
Feed	22,500	9,000	1,500	-	-
Tough 4 Northern	9,000	46,500	-	-	-
Tough No. 5, No. 6 and Feed	21,000	37,500	1,500	1,500	-
Others	10,812	16,551	-	-	-
Smutty Contract Grades	1,500	34,000	-	3,566	-
1 C.W. Garnet	1,500	-	-	-	-
1 C.W.A.D.	1,500	-	-	-	-
2 C.W.A.D.	58,539	-	-	-	-
3 C.W.A.D.	37,808	-	-	-	-
4 C.W.A.D.	5,000	6,000	-	-	-
Other Durum	5,000	19,500	-	-	-
T o t a l	686,525	379,318	15,000	6,566	4,500

GRAND TOTAL 1,091,909

FREIGHT ASSISTANCE SHIPMENTS

Although preliminary returns show a reduction in the shipments of wheat under the Freight Assistance Plan during the month of February, this decrease will not be as large as these data indicate. The preliminary return is usually raised when the final figures are available.

Shipments during the first seven months of the crop year amount to about 79 per cent of shipments during the corresponding seven-month period in 1943-44.

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/	991,422	777,577	78,282	130,670	46,602	362,562	2,387,115
September 1/	895,715	849,765	84,162	125,381	43,912	349,657	2,348,592
October 1/	876,332	677,347	85,522	119,968	29,307	328,680	2,117,156
November 1/	1,030,495	1,083,296	84,486	107,285	34,797	303,892	2,644,251
December 1/	886,450	768,663	91,330	88,652	30,023	322,558	2,187,676
January 1/	938,612	537,880	64,485	111,195	27,801	271,242	1,951,215
February	723,608	401,212	40,435	65,220	16,865	86,773	1,334,113
T o t a l	6,342,634	5,095,740	528,702	748,371	229,307	2,025,364	14,970,118
Same Period 1943-44	9,049,972	5,609,486	609,973	962,093	402,267	2,224,411	18,858,202

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

	August 1, 1944 to February 28, 1945	August 1, 1943 to February 28, 1944
- tons -		
Ontario	127,245	147,018
Quebec	168,821	165,659
New Brunswick	29,560	29,535
Nova Scotia	38,511	34,002
Prince Edward Island	7,002	9,575
T o t a l	371,139	385,789

1/Revised.

WHEAT MARKETINGS BY CROP DISTRICTS 1943-44

Farmers in the Prairie Provinces and certain areas of British Columbia marketed 329.3 million bushels of wheat during the 1943-44 crop year according to revised figures compiled by the Statistics Branch of the Board of Grain Commissioners.

In the following tables farmers' deliveries are shown by the method of marketing employed, i.e., through country elevators, directly to interior private and mill elevators, etc. The deliveries to country elevators are, in turn, broken down by crop districts.

Total Farmers' Deliveries of Wheat

<u>Prairie Provinces</u>	<u>Total - All Wheat</u>
	bushels
Country Elevators	323,630,538
Interior Private and Mill Elevators	4,953,958
Platform Loadings	682,588
By Truck into Interior Public and Semi-Public Terminals	5,136
<u>T o t a l</u>	<u>329,322,220</u>

Farmers' Marketings through Country Elevators

<u>Manitoba</u>	<u>Bread Wheat</u>	<u>Durum Wheat</u>	<u>Total Wheat</u>
	bu.	bu.	bu.
Crop District 1	3,047,203	333,611	3,380,814
2	5,883,270	455,717	6,338,987
3	7,537,546	1,687,867	9,225,413
4	818,718	202,806	1,021,524
5	1,021,649	23,010	1,044,659
6	109,898	1,603	111,501
7	4,722,901	172,454	4,895,355
8	3,459,349	100,902	3,560,251
9	2,068,285	16,104	2,084,389
10	4,388,796	4,334	4,393,130
11	2,516,844	675	2,517,519
12	309,193	-	309,193
13	975,405	-	975,405
14	359,397	-	359,397
Stratton, Ontario	375	-	375
<u>T o t a l</u>	<u>37,218,829</u>	<u>2,999,083</u>	<u>40,217,912</u>



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Farmers' Marketings through Country Elevators

	<u>Bread Wheat</u>	<u>Durum Wheat</u>	<u>Total Wheat</u>
	bu.	bu.	bu.
<u>Saskatchewan</u>			
Crop District 1A	5,847,394	443,120	6,290,514
1B	5,894,518	132,494	6,027,012
2A	8,618,727	115,887	8,734,614
2B	15,651,368	378,807	16,030,175
3AN	8,012,266	71,208	8,083,474
3AS	18,278,384	300,630	18,579,014
3BN	12,128,845	68,419	12,197,264
3BS	11,932,893	14,828	11,947,721
4A	3,512,004	2,784	3,514,788
4B	4,887,980	421	4,888,401
5A	12,473,301	103,981	12,577,282
5B	10,916,816	53,234	10,970,050
6A	13,581,479	761,484	14,342,963
6B	12,818,139	51,961	12,870,100
7A	12,174,033	2,574	12,176,607
7B	3,837,507	-	3,837,507
8A	5,107,807	98	5,107,905
8B	8,810,938	-	8,810,938
9A	10,614,537	-	10,614,537
9B	5,409,093	-	5,409,093
T o t a l	190,508,029	2,501,930	193,009,959

<u>Alberta</u>			
Crop District 1	7,889,861	-	7,889,861
2	7,623,799	-	7,623,799
3	1,894,203	-	1,894,203
4	12,784,278	-	12,784,278
5	5,371,080	-	5,371,080
6	14,704,120	1,526	14,705,646
7	8,246,610	-	8,246,610
8	7,294,701	-	7,294,701
9	535,634	-	535,634
10	10,612,344	-	10,612,344
11	2,940,889	-	2,940,889
12	119,367	-	119,367
13	1,847,552	-	1,847,552
14	3,257,293	-	3,257,293
15	450,820	-	450,820
16	5,102,056	-	5,102,056
British Columbia	96,734	-	96,734
T o t a l	90,451,141	1,526	90,452,667