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DOMINION BUREAU OF STATISTICS  
AGRICULTURAL BRANCH

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A large, stylized yellow wheat stalk is positioned vertically in the center of the cover, behind the title text.

# MONTHLY REVIEW OF THE WHEAT SITUATION

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DOMINION BUREAU OF STATISTICS - CANADA  
AGRICULTURAL BRANCH

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WORLD WHEAT SITUATION - SUMMARY

The government's action in placing a firm limitation upon wheat deliveries in 1945-46, together with a cool backward spring, has served to increase the planting of coarse grain and flax in Canada while decreasing the acreage to be devoted to wheat. The seeding of wheat has been virtually completed in the Prairie Provinces and warm weather is needed everywhere. Central Alberta and southern Saskatchewan need rain. Although most of the crop was late in being seeded, this factor does not rule out the possibility of an excellent crop. Weather conditions during June and July will largely determine the outcome.

The Canadian transportation authorities have been making plans to move out a record volume of Canadian grain for export during the next seven months. It is hoped it may be possible to place approximately 250 million bushels of wheat in export position during this period. Canadian wheat is required for liberated Europe whether distributed by the army, UNRRA or purchased by those countries who are handling their own supplies. In order to meet these requirements it is estimated that it will be necessary to move from 28 to 40 million bushels of grain a month through Canadian ports and from 10 to 12 million bushels a month through United States ports.

The magnitude of this task is impressive as clearances through Canadian ports during the eight months from April to November 1944 averaged 8.9 million bushels and did not exceed 10.8 million bushels during any one month. Clearances of Canadian wheat through American ports averaged 3.8 million bushels for this period and during October reached a high of 6.1 million bushels. During the 1944 season of navigation, however, the United States imported from 8 to 25 million bushels of wheat per month and much of the transportation capacity which this movement required will now be available for the movement of wheat to seaboard ports for overseas export. In addition to the clearances of wheat an export movement of Canadian flour of between 5 and 6 million bushels per month, wheat equivalent, is expected to continue.

Crop prospects in the United States continue to be very favourable with winter wheat headed as far north as Kansas, although probable yields have been reduced in recent weeks by excessive moisture in some areas, drought in others and the occurrence of rust in the south-west. The condition of the crop at May 1 was such as to indicate a prospective yield of 835 million bushels which, although 27 million bushels lower than the estimate of a month earlier, would still be a record. The planting of spring wheat is now virtually completed. Barring exceptionally unfavourable conditions between now and harvest time another billion bushel crop seems likely. The addition of a billion bushels of wheat to the prospective 350 million bushel carry-over at July 1 of this year would result in an even larger stock figure at July 1, 1946, despite large scale exports and continued relative heavy domestic disappearance.



Wheat seeding is now general in Argentina under relatively favourable conditions and government spokesmen are reported to be urging the seeding of a larger acreage. Critical food shortages now existing in Europe are considered such as to warrant maximum production. The latest reports suggest a probable increase of 10 per cent over the 15.4 million acres which were seeded in 1944. The realization of average yields on this increased acreage would result in a crop of about 205 million bushels, of which at least 80 million bushels would be available for export. As Argentina's exportable wheat surplus at May 1 is estimated at 174 million bushels and exports are averaging about 10 million bushels per month, a fair carry-over of old wheat at November 30 appears likely.

The government of Argentina has announced that it will continue to control the marketing of grains. A plan has been announced whereby the government will buy the crops of wheat, corn and flaxseed at a level sufficiently high to cover costs of production and permit a profit to the producer. Any surpluses derived from the sale of these grains in the export market will be made available for the betterment of the primary producer. Such forms of assistance as relief in cases of crop failure, advances to farmers for capital improvements and development of more economic methods of marketing are contemplated.

Moisture conditions in the wheat growing sections of Australia have been improved by recent rains, but some areas are still very dry and farmers are looking for rain to permit the beginning of seeding operations. An acreage objective of 11.5 million acres has been established which, if attained and average yields are realized, would result in a crop of about 138 million bushels. The feeding of wheat to live stock is being limited in order to spread the use of present stocks fairly evenly over the remainder of the year and any year-end carry-over will of necessity be small. Unless sufficient supplies of animal feedstuffs are available in 1945-46 to permit Australia to reduce her domestic use of wheat below the 90 million bushel level of the last two years, her exportable surplus from the crop now being seeded will be small.

#### European Situation

The wheat crop in Western Europe is reported to be in generally good condition, although the shortage of fertilizers and the reduced acreage seeded will result in a below average harvest. The decrease in acreage is particularly severe in France where the acreage of winter wheat is reported to be 35 per cent below the pre-war average. France has, however, imported spring wheat seed and it may have been possible to replace a part of these reduced plantings with spring grains. The dependence of France upon imported supplies of bread grains is much less than that of the low countries. Prior to the war Holland imported about 40 million bushels and the Netherlands about 28 million bushels of wheat annually. These countries will now be more dependent than ever upon outside supplies.

Crops are making satisfactory progress in the United Kingdom and trade sources are suggesting a crop of about 100 million bushels. Increased live-stock feed rations are scheduled to go into effect June 1, which will necessitate increased imports of feeding stuffs.

Wheat harvesting is well advanced in India on an acreage currently estimated at 34.1 million acres. This is very close to the pre-war average. Production has shown a much higher degree of fluctuation, but is generally upward owing to the increased area which is being brought under irrigation.

(May 31, 1945).

## ACREAGE INTENTIONS FOR 1945

A survey of the seeding intentions of Canadian farmers as at April 30 indicated an overall decrease of 869,700 acres in the area to be seeded to wheat in 1945 as compared with 1944. Nearly all of this prospective decrease in wheat acreage was in the Prairie Provinces where farmers planned to replace wheat with oats and barley. Since the end of April the weather has been cool throughout the wheat belt with excessive moisture in some areas, while other districts needed rain. The weather factor is, therefore, expected to reduce the wheat acreage still further while encouraging the planting of coarse grains and flaxseed.

The original intentions data indicated a total wheat acreage of 22.4 million acres as compared with 23.3 million acres in 1944. The acreage intentions in the Prairie Provinces are as follows:

	Intentions 1945 acres	Acreage Seeded in 1944 acres	Proposed Decrease acres
Manitoba .....	2,000,000	2,505,800	505,800
Saskatchewan .....	13,100,000	13,200,000	100,000
Alberta .....	6,477,000	6,738,000	261,000
T o t a l s .....	21,577,000	22,443,800	866,800

The shifts that have taken place in acreage seeded to the principal grain crops in western Canada during the war years will be seen in the following table which sets out the seeded acreage and summerfallow during the ten years 1935 to 1944, together with the intentions figure for 1945:

Seeded Acreage and Summerfallow in Prairie Provinces, 1935-1944

	Wheat	Oats	Barley	Flaxseed	Summerfallow
	(thousand acres)				
1935 .....	23,293	9,478	3,187	297	14,252
1936 .....	24,838	8,674	3,724	469	16,855
1937 .....	24,599	8,579	3,562	233	15,150
1938 .....	24,946	8,518	3,687	202	16,206
1939 .....	25,813	8,227	3,607	289	15,950
5-year average .	24,698	8,695	3,553	298	15,683
1940 .....	27,750	7,818	3,622	364	17,326
1941 .....	21,140	8,137	4,735	982	23,111
1942 .....	20,653	9,666	6,414	1,466	19,979
1943 .....	16,091	11,790	7,896	2,918	20,637
1944 .....	22,444	10,447	6,763	1,298	19,428
5-year average .	21,616	9,572	5,886	1,406	20,096
1945 1/ .....	21,577	11,155	7,558	1,191	19,236

1/ Intentions indicated on April 30, 1945.

The 1945 acreage objective for wheat in Canada set at the Dominion-Provincial Agricultural Conference last December was 21,500,000 acres with 20,797,000 acres in the West.



## CHICAGO WHEAT FUTURES

The end of the European war was discounted as far as wheat is concerned and the market maintained a steady level throughout the month. The May future went off the board at \$1.77, which was a high for the season and only 3/8 cents below the ceiling.

The principal factor influencing price in the immediate future is the availability of transportation. The supply of cars has not been adequate to meet the demand for the movement of wheat to the seaboard for export, to fill domestic needs and to rebuild terminal market stocks. The latter have dropped to a level equivalent to only one-half that of a year ago.

Cash wheat prices have been holding steady at the ceiling level of \$1.74 3/8 plus 1 1/2 cents markup for No. 2 dark hard.

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)				
April 26	174/5	164/2	158/3	157/6
27	174/2	163/5	158/2	157/6
28	174/1	163/4	158/4	157/7
30	174/3	164/3	159/6	159/1
May 1	173/5	163/4	159/3	158/7
2	173/3	163/2	158/6	158/2
3	175/2	165/3	160/4	160
4	175	165/4	160/6	160/2
5	175/2	165/4	161/2	160/6
7	175/7	166/4	162/2	162
8	175/2	166/2	162/3	162/1
9	174/4	164/6	160/4	160
10	174/1	163/5	159/3	159
11	174/4	162/4	158/7	158/5
12	175	162/6	159/2	158/7
14	175/4	163/5	160	159/6
15	176/4	164/7	160/7	160/2
16	176/7	165/1	161/6	160/7
17	176/7	164/3	161/3	160/3
18	176/7	164/5	161/7	160/6
19	176/5	163/6	161/3	160/2
21	176	161/6	159/1	158/5
22	177	162/5	159/5	158/7
23		163/4	160/4	159/4
24		163/6	159/7	158/6
25		165/3	161	160
26		166/4	162/5	161/6
28		168	163/6	163/3

CENTS  
PER  
BUSHEL

160

150

140

130

120

110

100

90

80

MAY

JUNE

JULY

AUG.

SEPT.

OCT.

NOV.

DEC.

JAN.

FEB.

MAR.

APR.

MAY

*No. 1 Man. St. John*

*Australian*

*Argentine Rosafé*

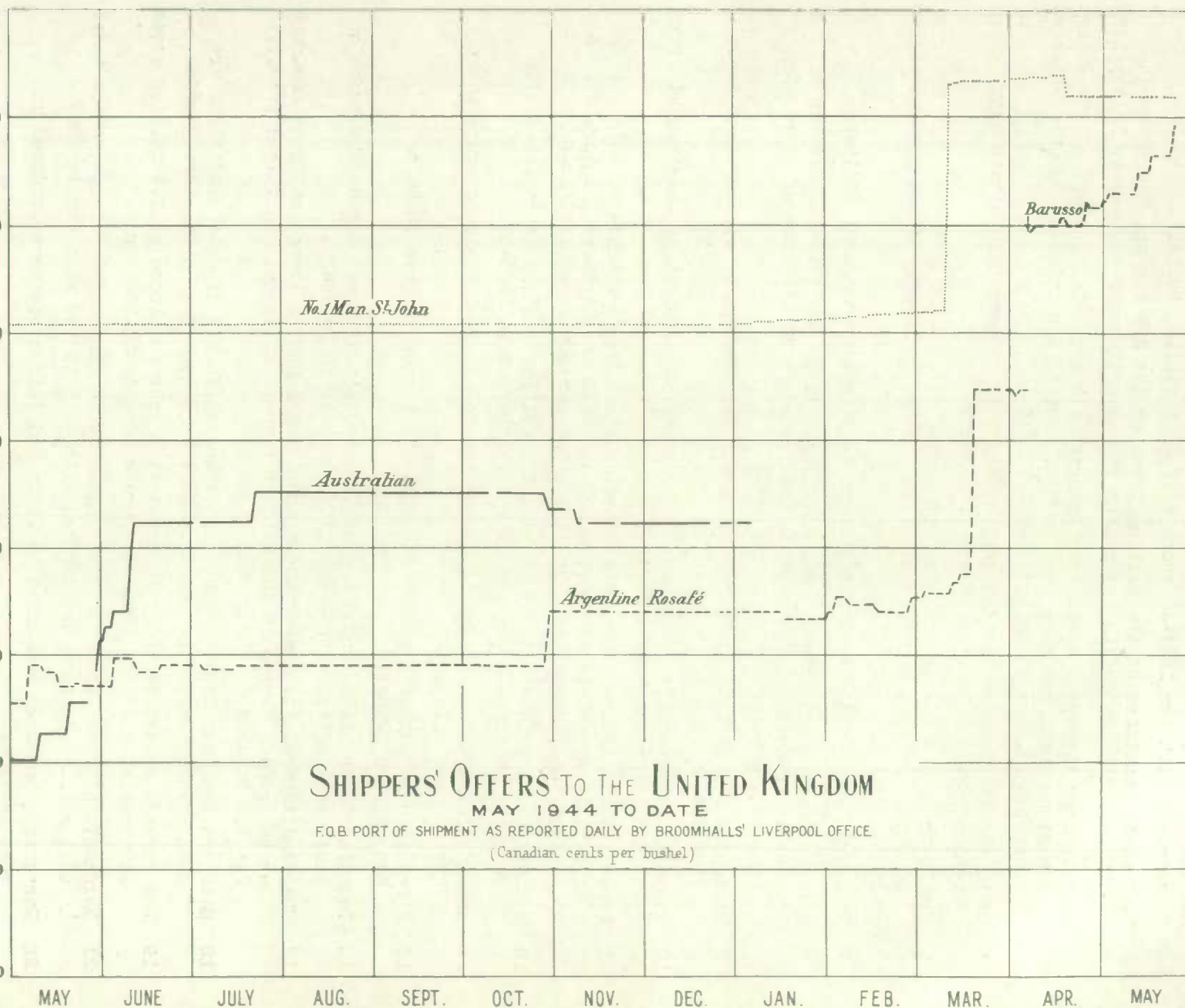
*Barusso*

## SHIPPERS' OFFERS TO THE UNITED KINGDOM

MAY 1944 TO DATE

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

(Canadian cents per bushel)



## CALENDAR OF WHEAT EVENTS

- May 1 The wheat crop in South Africa is now estimated at 14.2 million bushels as compared with the 1934-38 average of 16.8 million bushels.
- 2 Cash wheat continues at the ceiling level of 174 3/8 for No. 2 dark hard on Chicago market with the Government in the market for any available supplies.
- 3 Reports from Liverpool state that Rumania will probably drop out of the export market as surpluses move into Russia. During the thirties Rumania produced about 123 million bushels of wheat a year.
- 4 Quota restrictions on the delivery of wheat in Western Canada have been removed for the balance of the crop year.
- 5 The Government of Argentina has been urging farmers to increase their acreage of wheat and assuring them of a fair price. The markets are now controlled by the State.
- 7 Cold, wet weather is retarding the growth of grains in Great Britain.
- 8 British millers are experiencing difficulty in maintaining the vitamin B 1 content of National flour since the reduction in the rate of extraction from 82 1/2 per cent to 80 per cent.
- 9 France is reported to have imported a million bushels of spring wheat seed from Canada.
- 10 Canadian farmers intend to seed 22.4 million acres of wheat as compared with 23.3 million acres in 1944.
- 11 Press reports indicate that the Canadian Wheat Board intends to ship out the 1.8 million bushels of wheat which are held in the Churchill terminal as soon as the war ban has been lifted and navigation conditions permit.
- 12 Marketings of wheat in Canada exceed 294 million bushels as compared with 227 million bushels for the comparable period in 1943-44.
- 14 Drought in Portugal and Spain is expected to result in below average wheat crops again this year.
- 15 A preliminary estimate places the 1945 wheat crop in Free China at 593 million bushels.
- 16 Canadian flour mills ground 9.6 million bushels of wheat during the month of March as compared with 8.4 million bushels in February.
- 17 The condition of the winter wheat crop in the United States at May 1 was such as to produce a crop of 835 million bushels if normal conditions prevail for the balance of the growing season.
- 18 Rain has been received in sections of Australia but drought conditions are still widespread. The new crop will be seeded from April through June.
- 19 The acreage seeded to wheat in Egypt this year is placed at 1.7 million acres as compared with the 1934-38 average of 1.4 million acres.
- 21 Shipments of wheat down the Great Lakes since the opening of navigation total 60.1 million bushels as compared with 65.1 to the same day in 1944.
- 22 Harvesting has been completed in India and fair crops were produced in most sections.
- 23 Smaller planted acreages and lack of fertilizers appear likely to reduce grain production in Western Europe very appreciably this year.
- 24 Warm weather is needed throughout the wheat belt of Western Canada to permit the completion of seeding.



## UNITED STATES

Winter wheat is in good condition in most areas with some sections of Kansas and Nebraska reported excellent, although the crop is poor in western Texas because of continued dryness. The winter wheat is headed as far north as Kansas, although some rust damage has occurred in the south-west. Seeding of spring wheat has been practically completed in the main belt and those fields which were seeded early are now up to a good stand. The seeded acreage is reported to be somewhat below the intentions figure of 19 million acres owing to the lateness of the season and excessive moisture in some areas. This applies particularly to the seeding of durum wheat in the Red River Valley area of north-eastern North Dakota.

On May 1 the Crop Reporting Board reduced their estimate of the probable winter wheat crop from 862.5 million bushels to 835.2 million bushels. This would still be the largest crop on record and compares with 764.1 million bushels in 1944 and the 1934-43 average of 586.0 million bushels. Loss of acreage from winter-killing has been the lightest in many years. Late winter and spring precipitation was above normal in most areas and the warm March weather permitted abnormally rapid spring growth. Excessive rains in Eastern Kansas, Oklahoma and Texas have resulted in some losses from flooding. Supplies of soil moisture are adequate in most areas to carry the crop to maturity, the Texas panhandle being an exceptional region needing rain.

The Bureau of Agricultural Economics reports that wheat prices are currently the highest in twenty years, reflecting the increased demand associated with the war. It is anticipated that a large 1945 crop would likely lower prices in 1945-46 to a level somewhat below that of 1944-45. The high European demand, together with domestic price supporting guarantees, may be expected to prevent any drastic price declines. The Agricultural Adjustment Act of 1938, as amended by the Stabilization Act of October 1942, requires that the price of wheat be supported at not less than 90 per cent of parity for a two-year period after the January 1 following the official proclamation of the cessation of hostilities. A qualifying clause provides for the maintenance of marketing quotas.

The prospective July 1 wheat carry-over in the United States is still being estimated at from 350 to 375 million bushels, although the estimate of domestic disappearance for the current crop year has been decreased from 974 to 967 million bushels. Since the carry-over at July 1, 1944 was 1,395 million bushels, net exports of from 78 to 53 million bushels are indicated. Exports include lend-lease and civilian relief feeding as well as commercial exports. Gross exports would be larger by the amount of total imports into the United States. Up to May 17 imports from Canada appear to have been roughly 42.5 million bushels. The principal factor limiting the volume of exports from the United States appears to be the difficulty involved in getting cars to move grain to ports since the demand for wheat in liberated countries is very large.

## ARGENTINE LETTER

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

### Crop Conditions

The official crop report of the Ministry of Agriculture, which has recently been issued, states that the planting of wheat has been begun in the western part of the province of Buenos Aires and in the eastern part of the Pampa territory. The planting of other cereals for the dual purpose of pasture and grain production is now also becoming general. Up to the third week in April field work was difficult because of lack of rain, but widespread precipitation subsequent to that date has greatly improved the condition of the soil.

A Government announcement which vitally affects the welfare of the producers and of the trade in the Republic has been made this morning. It is a proposal that the State will increase still further its control of the marketing of the country's surpluses of grains. The Executive Power has established a system whereby it will purchase all grains and oil seeds intended for export and, in turn, sell these products to the exporter. The object, as stated by the Decree, is to sustain the price paid to the primary producer at a level higher than that which would ordinarily prevail in the export market. In adopting this policy the Executive Power is apparently acknowledging a moral claim on the part of rural producers who, in the past ten years, have carried on their operations under depressed conditions and with a minimum of State aid. Hopes are now entertained that there will be a rebirth of the Argentine economy in which the producer will be able to free himself of some of the sacrifices which he has borne in the past. It is now proposed that the Government will buy the crops of wheat, maize and linseed at a price sufficiently high to cover the cost of production, plus a profit of 10 per cent to the producer. It is also contemplated that a fund will be formed from the profits realized in the marketing of these crops and that a portion of these monies will be returned to the producer. This will be done through the advance of sums necessary for farm improvements or in the way of relief to farmers who have suffered crop failure. A part may also be used to promote more rational and economic methods of marketing.

The Government intends that the new system should be applied to the current year crops of linseed and maize and as far as possible to wheat. However, it is not proposed to apply this scheme to the last crop of coarse grains and sunflower seeds, since a considerable proportion of these have already been marketed. The National Grain and Elevator Board has been empowered to exercise control over prices should price fluctuations, resulting from profit speculation, arise as a result of the announcement of this scheme.

At the present moment there appears to be an opinion in official circles that there are excellent grounds for expecting recovery in the production of grains and in grain markets. A fear that international prices would not prove sufficient to cover the cost of production, as happened during the decade of the thirties, has largely disappeared. Present prospects now indicate a great demand for agricultural products and a progressive improvement in the statistical position of the principal export grains. These circumstances are now considered to warrant a belief that we are now on the eve of a period of rising prices.



### Supplies and Markets

There is a total absence of any official statistical information with regard to the stocks and movement of wheat during recent weeks or perhaps months. But taking as a starting point the available exportable balance of 197,670,860 bushels shown in my report dated March 14, 1945, arrived at on the basis there explained, the following may be assumed to be approximately the situation as at May 1st:

Balance still disposable as at March 1, 1945 .....	197,670,860 bushels
Deduct: March exports - Wheat .....	8,528,478 bushels
Flour as wheat ..	486,589 "
Assumed April shipments .....	11,022,930 "
Donation promised to Italy .....	3,674,310 "
Total deductions .....	23,712,307 "      23,712,307 "
Assumed available balance as at May 1, 1945 .....	173,958,553 "

Government spokesmen have urged the farmers to plant the maximum area possible, urging that the country will have ample opportunities to dispose of her crops in view of the critical food shortage in other parts of the world. Equitable and remunerative prices are assured to the growers. No estimate has yet been published of the area planted. The crop was put in under reasonably good conditions, and probably at least a normal crop can be expected.

During the early part of the month buyers for the United Kingdom were active and a substantial quantity was acquired, but afterwards the market became very quiet as a consequence of the Regulatory Board withdrawing as a seller. It is the intention of the Government to set an official basic price for the wheat crop, and there is considerable curiosity as to what this will be. Only light offerings of wheat by private holders were being made, principally because of the difficulties which still exist with regard to transportation.

### AUSTRALIAN CABLE

The Canadian Trade Commissioner at Melbourne cabled on May 16 regarding the wheat and flour situation in Australia as follows:

"Australian wheat stocks at the end of April totalled 59 million bushels. A supply of commitments for the remainder of the crop year are approximately as follows:

	<u>bushels</u>
Local flour requirements .....	19,000,000
Breakfast food and sundries .....	2,500,000
Stock feed .....	20,500,000
Flour for the armed forces .....	6,000,000
One Month's reserve of flour in mills .....	375,000
Seed .....	750,000
Wheat held in Western Australia for which transport is not available .....	9,875,000
T o t a l .....	59,000,000

"Although beneficial rains have fallen in many districts during the month of May the drought remains unbroken. Much more rain is needed and if it comes in time it is hoped to sow a total of 11.5 million acres to wheat."



# SELLING PRICES OF CANADIAN WHEAT

The Class 2 price of Canadian wheat established a new high of \$1.55 per bushel during the latter half of the month of May. The price of Argentine Barusso wheat for export has climbed from \$1.49 in April to \$1.59 1/2 on May 25. This compares very closely with the Class 2 price of No. 1 Northern, f.o.b. St. John as is apparent from the chart on page 5.

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

## 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 .....	153/5	150/5	148/5	
May 1 .....	154	151	149	
2 .....	154	151	149	
3 .....	154	151	149	
4 .....	154	151	149	
5 .....	154	151	149	
7 .....	154	151	149	
8 .....		V E Day		
9 .....	154	151	149	
10 .....	154	151	149	
11 .....	154	151	149	
12 .....	154	151	149	
14 .....	154	151	149	
15 .....	155	152	150	
16 .....	155	152	150	
17 .....	155	152	150	
18 .....	155	152	150	
19 .....	155	152	150	
21 .....	155	152	150	
22 .....	155	152	150	
23 .....	155	152	150	
24 .....		H o l i d a y		
25 .....	155	152	150	
26 .....	155	152	150	

## CANADIAN SUPPLY POSITION

The supply of Canadian wheat, available for export and/or carry over at July 31, 1945, amounted to 428.8 million bushels at May 1 as compared with 443.5 million bushels at May 1, 1944.

Exports of wheat and wheat flour for the first nine months of the crop year amounted to 201.8 million bushels as compared with 255.3 million bushels for the comparable period in 1943-44. Overseas clearances have increased from 85.4 to 118.0 million bushels during this period as compared with clearances for the first three quarters of 1943-44. Exports to the United States have declined by approximately 86 million bushels so far this season, this decline being sufficient to account for the decrease in total exports despite the 33 million bushels increase in shipments overseas.

### 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-April 30 ....	157.9 <sup>1/</sup>	212.3
Flour Exports in terms of wheat August-April 30 ..	43.9	43.0
Total Exports Wheat and Flour .....	201.8	255.3
Balance on May 1 for export or carry-over .....	428.8	443.5

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



# FARMERS' MARKETINGS IN THE PRAIRIE PROVINCES

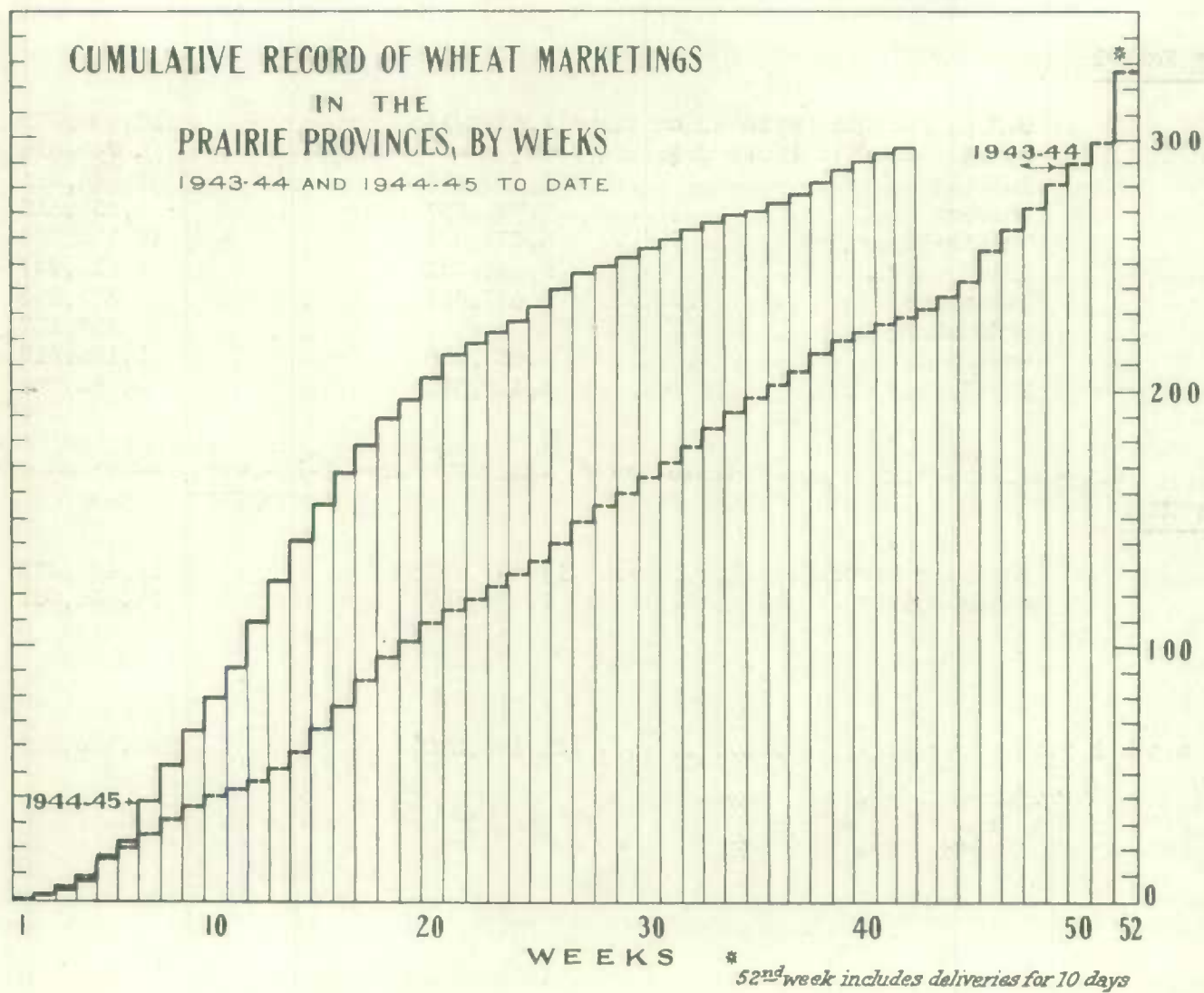
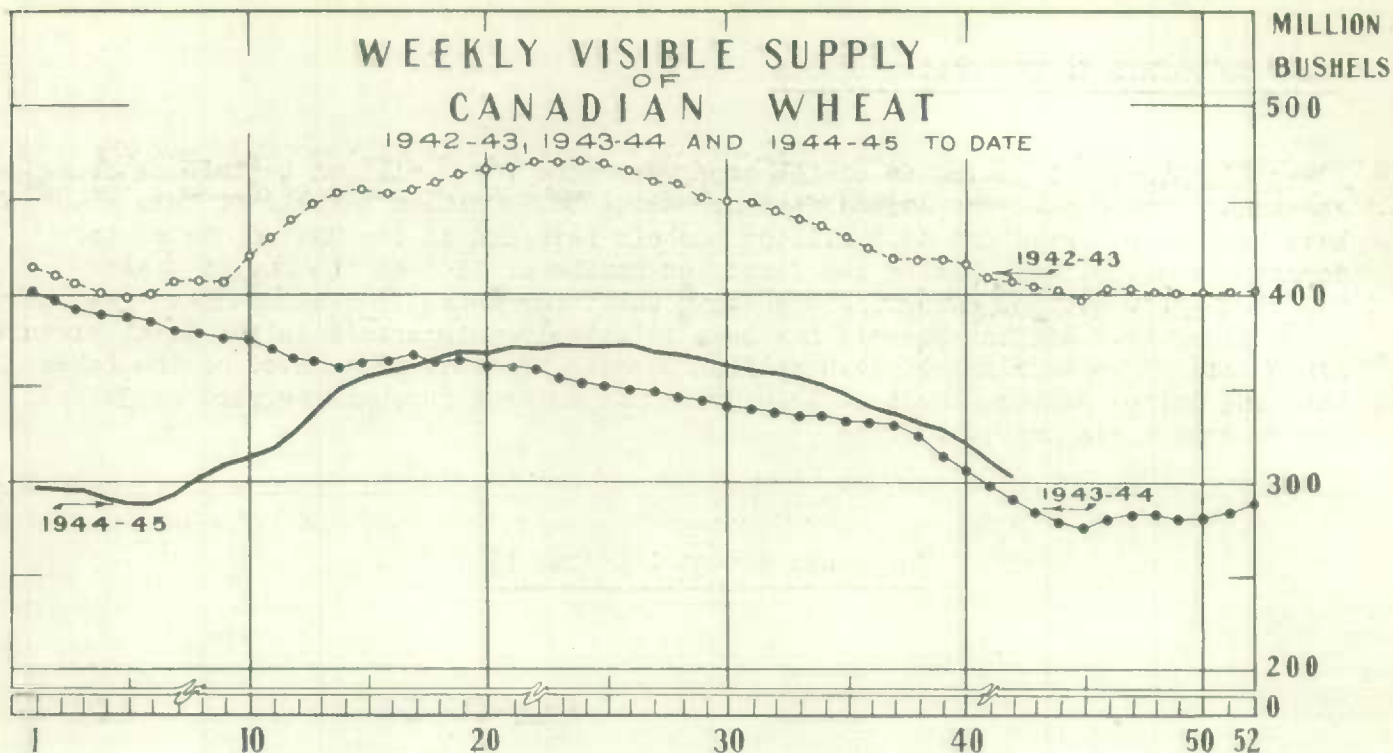
The removal of all restrictions on the delivery of wheat has had little effect on marketings since 98 per cent of all points were already on an open quota. The capacity of the country elevators is approximately 303.5 million bushels and the present grain stocks of 162.4 which, after allowing for working space, leaves room for about 90 million bushels of grain. This available space is only from 15-20 million bushels short of sufficient to handle expected deliveries to the end of the crop year. With the present active rate of shipments from country elevators there will be no general shortage of elevator space this year.

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

Week ending		Manitoba	Saskatchewan	Alberta	Totals	Last Year
		- bushels -				
August	1-3	555,480	415,651	496,881	1,468,012	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	1,035,622	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	197,923	1,460,345	1,101,125	2,759,393	6,145,755
April	29	112,104	1,266,725	814,410	2,193,239	7,405,567
	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 1/	161,672	2,184,264	1,474,486	3,820,422	6,045,597
May	26	344,875	3,493,746	1,442,181	5,280,802	5,663,910
	3	294,684	2,083,297	1,000,780	3,378,761	3,861,916
	10	177,518	1,670,197	863,398	2,711,113	2,773,191
	17	194,639	1,337,736	813,576	2,345,951	2,715,228
T o t a l		36,663,980	182,180,102	78,048,025	296,892,107	229,355,663

1/ Revised.





## WHEAT SHIPMENTS TO THE UNITED STATES

Since the beginning of the crop year some 101.2 million bushels of Canadian wheat have moved into the United States. About 58.8 million bushels of this wheat have been re-exported and 42.5 million bushels retained in the United States for domestic consumption. During the first ten months of 1943-44 the United States imported 141.7 million bushels of Canadian wheat for domestic consumption. The rail movement of 15.2 million bushels has been relatively unimportant in the total picture. Since March 27 approximately 17.9 million bushels of wheat have moved on the lakes into the United States. Most of this grain has entered through the port of Buffalo for re-export via American ports.

### Shipments August 1 to May 17

1945

1944

- bushels -

#### By Vessel

U.S.A. Pacific Ports .....	1,633,914	15,202,381
U.S.A. Atlantic Ports .....	-	740,219
Buffalo .....	54,490,893	59,944,311
Chicago .....	7,746,957	6,732,515
Duluth-Superior .....	5,479,526	16,156,578
Erie .....	9,645,792	9,810,947
Milwaukee .....	677,554	377,596
Ogdensburg .....	-	557,137
Oswego .....	1,833,013	1,126,617
Toledo .....	4,469,371	3,293,224

#### By Rail

Seaboard Ports .....	13,935,453	15,402,472
Other Points .....	1,277,107	37,562,331

T o t a l .....	101,189,580	166,926,328
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# RAIL MOVEMENT FROM FORT WILLIAM--PORT ARTHUR

The diversion of box cars from the East to the country elevator--Lakehead route--which accompanied the opening of lake navigation has been reflected in a sharp contraction in the rail movement of wheat from Fort William--Port Arthur during the month of April. Most of this wheat has been of a lower grade.

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

	1944-45	1943-44	1942-43	1941-42
	- bushels -			
August .....	91,891	990,879	390,264	90,122
September .....	169,603	1,547,042	600,921	143,816
October .....	86,572	780,035	644,926	209,376
November .....	97,512	711,238	1,250,952	472,194
December .....	1,236,339	898,565	3,871,297	1,488,427
January .....	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 .....	196,042	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	923,324	888,749
Total (12 months) .....		15,300,422	20,795,182	9,980,553

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

	Ontario	Quebec	New Brunswick	Nova Scotia	Prince Edward Island	U.S.A.
	- bushels -					
2 Northern .....	6,000	-	-	-	-	-
4 Northern .....	18,000	37,000	-	7,267	1,500	-
No. 5 .....	30,200	18,000	3,000	1,500	1,500	-
No. 6 .....	1,500	-	-	-	-	-
Feed .....	3,000	-	-	-	-	-
Tough No. 5 .....	3,000	4,500	-	-	-	-
Tough No. 6 .....	6,000	1,500	-	-	-	-
Tough Feed .....	-	3,000	-	-	-	-
Tf. Rej. 3 Nor. Sptd. ....	-	1,500	-	-	-	-
Tf. Sple. Htd. ....	-	1,500	-	-	-	-
Smutty 2 Northern .....	-	18,000	-	-	-	-
Smutty 3 Northern .....	-	6,010	-	-	-	-
Sple. Lxd. Brkn. ....	-5,714	-	-	-	-	-
2 C.W.A.D. ....	10,000	-	-	-	-	2,065
4 C.W.A.D. ....	-	1,500	-	-	-	-
5 C.W.A.D. Lxd. ....	-	6,000	-	-	-	-
Smutty 2 C.W.A.D. ....	-	1,500	-	-	-	-
Smutty 3 C.W.A.D. ....	-	1,500	-	-	-	-
Sple. Lxd. A.D. Brkn. ....	5,714	-	-	-	-	-
T o t a l .....	77,700	101,510	3,000	8,767	3,000	2,065
GRAND TOTAL .....	196,042					



## FREIGHT ASSISTANCE SHIPMENTS

Although the movement of millfeeds under this program is only slightly below that of 1943-44, the shipment of wheat has declined by about 20 per cent. The movement of oats and barley has fallen off, but to a lesser extent. The shipment of wheat to Ontario has exhibited a greater absolute decline than the movement to any other province. The 1944 Ontario wheat crop was up to 21.7 million bushels from the 13.9 million bushels harvested in 1943. Since only 5.6 million bushels of this larger crop had been marketed by producers up to the end of February it is apparent that most of the eastern crop is fed on the farm.

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	130,870	46,602	362,562	2,387,111
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	322,758	2,187,876
January 1/	938,612	537,880	64,485	111,195	27,801	293,474	1,973,447
February	723,608	401,212	40,435	65,220	16,865	253,504	1,500,844
March 2/	1,014,478	471,538	58,638	61,455	32,886	94,483	1,733,478
T o t a l	7,357,112	5,567,278	587,340	809,826	262,193	2,309,010	16,892,759
Same Period 1943-44	10,164,762	6,216,511	667,268	1,056,896	433,464	2,481,681	21,020,582

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

	August 1, 1944 to March 31, 1945 2/	August 1, 1943 to March 31, 1944
- tons -		
Ontario .....	144,445	168,646
Quebec .....	196,173	193,770
New Brunswick .....	33,779	33,854
Nova Scotia .....	42,051	38,030
Prince Edward Island .....	7,738	10,812
T o t a l .....	424,186	445,112

1/ Revised. 2/ Data for March include preliminary returns for April so that the return for the month is not strictly comparable to those of preceding months.

# WHEAT VISIBLE SUPPLY

The following table shows stocks of Canadian wheat in store and in transit in Canada and the United States on May 17, 1945, along with comparative figures for approximately the same date in 1944 and 1943:

	<u>1945</u>	<u>1944</u>	<u>1943</u>
	- 000 bushels -		
Country Elevators - Manitoba .....	15,955	18,235	30,285
Saskatchewan .....	75,110	79,545	115,255
Alberta .....	59,025	62,390	76,145
T o t a l .....	150,090	160,170	221,685
Interior Private and Mill Elevators .....	5,608	5,789	5,759
Interior Public and Semi-Public Terminals .	14,239	10,817	16,130
Pacific Ports .....	18,073	14,996	19,457
Churchill .....	1,878	1,878	2,617
Fort William and Port Arthur .....	37,649	18,359	76,006
Eastern Elevators - Lake Ports .....	18,677	25,101	21,978
St. Lawrence and Seaboard Ports .....	14,231	8,553	10,538
United States Ports .....	16,610	10,150	8,671
In Transit - Lakes .....	3,517	4,282	3,726
In Transit - Rail .....	20,042	21,594	13,877
In Transit - U.S.A. ....	3,062	8,901	3,793
T o t a l .....	303,676	290,590	404,237

## 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 May 17, 1945</u>	<u>August 1, 1943 to May 18, 1944</u>
	- bushels -	
Collingwood .....	4,065,601	1,729,203
Depot Harbour .....	-	255,700
Midland .....	9,552,579	10,062,107
Owen Sound .....	4,105,253	2,025,753
Port McNicoll .....	11,403,233	7,068,029
Goderich .....	1,335,852	1,360,001
Sarnia .....	1,050,467	720,700
Port Colborne .....	29,932	326,820
Kingston .....	1,392,755	14,700
Prescott .....	1,088,499	1,257,168
Montreal .....	1,453,293	3,097
Sorel .....	139,795	1,877,969
Three Rivers .....	159,000	701,037
Quebec .....	1,259,787	-
Total Eastern Lake and St. Lawrence Ports ....	37,036,046	27,402,284
Fort William-Port Arthur, Aug. 1 to Apr. 30 .	492,549	6,863,955



# EXPORTS OF CANADIAN WHEAT AND FLOUR

During the first half of the 1944-45 crop year Canada exported 139 million bushels of wheat and wheat flour to all destinations as compared with 152.6 million bushels for the comparable period in 1943-44. These data are compiled by the Statistics Branch of the Board of Grain Commissioners from information on the clearances of Canadian wheat from ports in Canada and the United States, together with imports of Canadian wheat into the United States for domestic consumption and milling in bond.

These data differ only slightly from the "corrected" customs statistics on exports which are published from month to month in the analysis of the Canadian supply position, which is published on page 11 of this Review. Since the Customs exports include Canadian wheat moving into bond in the United States and this movement into bond is not an export per se, it is necessary to adjust customs data for changes in stocks of Canadian wheat in the United States.

The abrupt decline in exports during December and January is attributable to the difficult rail transportation conditions prevailing in Canada and the United States during that period.

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

	1944-45	1943-44	1942-43	1941-42	1940-41
	- bushels -				
August .....	24,674,871	27,716,862	15,546,739	20,391,405	11,560,065
September .....	26,208,301	22,215,056	9,827,484	15,556,038	9,622,992
October .....	26,523,023	23,844,843	14,169,255	14,314,814	10,810,971
November .....	23,952,950	23,188,842	15,637,315	17,752,672	13,705,174
December .....	17,692,186	25,419,684	8,389,775	20,259,936	8,953,630
January .....	19,957,881	30,196,990	13,878,802	18,166,222	15,220,986
February .....		33,525,149	15,650,208	15,610,033	18,110,049
March .....		27,905,974	23,128,154	20,046,761	21,497,072
April .....		41,315,967	23,278,531	29,696,162	30,757,859
May .....		36,658,430	26,180,186	23,705,259	36,815,411
June .....		26,336,025	27,190,819	17,054,252	31,084,121
July .....		25,431,498	21,823,634	13,274,880	23,067,916
Crop Year Totals .....		343,755,320	214,700,902	225,828,434	231,206,246
Total for 6 Months					
August - January .....	139,009,212	152,582,277	77,449,370	106,441,087	68,873,818
6 Months' exports as % of Crop Year Total		44.39	36.07	47.13	29.79