

DOMINION BUREAU OF STATISTICS AGRICULTURAL BRANCH

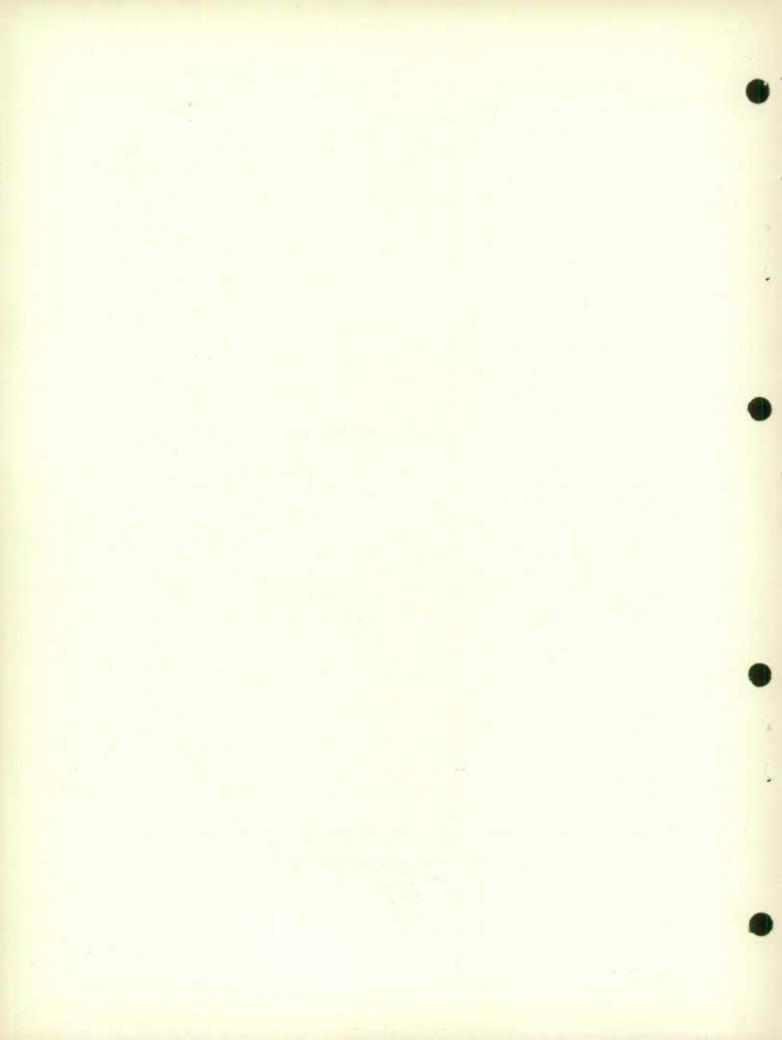
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MONTHLY REVIEW OF THE WHEAT SITUATION

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

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WORLD WHEAT SITUATION - SUMMARY

Concern over a world-wide shortage of wheat was expressed during this month by President Truman and he said that he had asked Canada, Australia and Argentina to provide their proportionate share in meeting the needs of liberated countries. He placed the problem of supplying the destitute people of the world mainly on the shoulders of the United States, Canada, Argentina and Australia, the principal wheat-exporting countries of the world. At the same time, he urged each of the importing countries to produce the maximum quantity of wheat on its own land and to make the best possible use of existing stocks.

Early estimates of world needs and particularly those of Europe have not been diminished and any revisions in the requirements of individual countries have usually been upward. Failure to secure supplies of other foodstuffs has increased the demand for bread grains. France appears to be in the greatest need of additional supplies, and bread rationing which was suspended November 1, 1945 had to be reinstituted at the first of the year when import supplies failed to keep pace with demand. Canadian shipments of wheat are being speeded up to provide some relief for France, but it is doubtful whether sufficient quantities can be released to end rationing.

The huge stockpiles of wheat which existed as little as three years ago in the four principal overseas exporting countries are being rapidly depleted and, providing that adequate transportation is available for the remainder of the crop year, continued heavy exports will, in all likelihood, reduce carry-over stocks to the minimum required until the new crop is harvested. According to the United States Bureau of Agricultural Economics, reduced exports during the war caused the wheat stocks of the four major exporters to grow and at July 1, 1943 they totalled 1,740 million bushels, three times the 572 million average of the 1927-36 period. By July 1945, stocks had been reduced to 826 million bushels and by July of this year they may be halved again.

As more complete information becomes available concerning production and probable domestic consumption, constant stock-taking is in process on the part of each exporter to determine its ability to contribute to the import needs of the world. Since her first estimate of production in September, Canada has been forced to reduce her 1945 wheat production estimates by 15.5 million bushels, an amount which is partially compensated for by a downward revision in probable domestic consumption, a reduction of about 10 million bushels owing to reduced live-stock numbers and a consequent smaller estimate of feed needs. In assuming her "proportionate share of the responsibility in meeting the urgent requirements of the liberated countries." Canada, during the first five months of the current crop year, has exported a total of 176.5 million bushels of wheat and wheat flour in terms of wheat as compared with 118.0 million bushels for the corresponding period a year earlier. When comparing the two periods it is noted that flour exports remained almost equal for each of the two years. Imports of Canadian wheat into the United States for human consumption and milling in bond during the 1945 period (July to December) amounted to 8.0 million bushels, almost 75 per cent less than

for the same period in 1944. The greatest increase was revealed in overseas clearances of wheat which jumped from 63.0 million in the 1944 period to 145.6 million in 1945. The estimated balance on hand at January 1, 1946 for export during the remainder of the crop year and carry-over at July 31, 1946 amounted to some 237.8 million bushels, less than half the balance on hand at the same date a year ago.

While the overseas movement of grain has declined considerably since the close of navigation on the Great Lakes, the advent of spring should witness larger shipments again. However, taking into account the estimated remaining supplies and the need to meet carry-over requirements at the end of the crop year, it is unlikely that exports during the last six months of 1945-46 will reach the magnitude of those for the first half of the current crop year. At the present time it is estimated that in the first half of this crop year almost 200 million bushels of wheat will have been shipped out. If the carry-over at July 31, 1946 amounts to 50 million bushels, which is not the lowest on record, then the amount remaining for export during the last six months of this crop year would be in the neighbourhood of 160 million bushels.

If railway cars can be provided in sufficient numbers to move the large interior stocks of United States wheat to seaboard points and primary producers can be induced to step-up marketings now that the New Year is here, the Bureau of Agricultural Economics is of the opinion that exports for the season can be boosted to almost 400 million bushels. This would leave a carry-over at June 30, 1946 of about 175 million bushels, a sufficient amount in view of present prospects for above-average yields next year. During the first half of the 1945 46 season, United States exports amounted to 165 to 175 million bushels, leaving some 225 million bushels to move out during the next six months if the above objective is to be realized.

During December the Argentine Government announced that its exportable surplus of wheat for the 1946 season would amount to 80.6 million bushels. Since this estimate was made on the basis of the first official production estimate of 165.7 million bushels, it may be reduced in view of the fact that the second estimate now places the Argentine wheat crop at 149.5 million bushels. Import needs of other South American countries during the past two years have claimed over 50 million bushels for each year. Even assuming that exportable supplies will remain at 80 million bushels, prospective trade with her South American neighbours will leave Argentina much less than the 40 million bushels which were sent to Europe during each of the last two years.

While Australia will experience no difficulty in disposing of the exportable surplus of her present 135 million bushel crop, a conference was being held this month in that country for the purpose of discussing proposals for a five-year plan to stabilize the wheat industry. This plan is to include a guaranteed price of five shillings twopence (Australian), approximately 92 cents Canadian, per bushels f.o.b. bagged for all wheat marketed in Australia. The same price f.o.b. bagged is guaranteed to growers for all F.A.Q. wheat exported. The Australian Wheat Board is to be retained as the central marketing organization. When export prices exceed the guaranteed price, a stabilization contribution by the industry of 60 per cent of such excess is to be paid into a fund to assist in meeting the guaranteed price when export prices are below it. Finally a scheme is to be devised whereby control will be exercised over wheat acreages.

While it may seem premature to be considering probable demands, especially those of Europe, for wheat during the coming crop year, it is the considered opinion of that part of the trade most intimately acquainted with the European situation that the import needs of that quarter will continue at high levels throughout the 1946-47 crop year. Although reports reveal an increase in the acreage of fall wheat sown in 1945 as compared with last year's very small area, they indicate that it is still considerably short of the prewar level. This can be attributed to the shortages of labour, equipment and fertilizers. It is expected that some countries will attempt to increase spring plantings but experience has shown that yield from spring sowings rarely equals winter-sown wheat and at the time of writing, a below normal harvest in 1946 was anticipated.

THIRD ESTIMATE CANADA'S 1945 WHEAT CROP

The production of wheat in Canada in 1945 is placed at 305,912,000 bushels valued at \$324,227,000 in the third estimate of production issued on January 22. This compares with the final estimate of 416,635,000 bushels for the 1944 crop which was valued at \$440,446,000. In each of the two years the average farm price was \$1.06 per bushel. Total wheat production in the Prairie Provinces in 1945 is now estimated at 282 million bushels compared with the final estimate for the 1944 crop of 391.7 million bushels.

All of the reduction from the third estimate of Canada's 1944 wheat production of 435.5 million bushels to the final estimate of 416.6 million bushels occurred in the Prairie Provinces. Disposition data revealed that production in the three Prairie Provinces had been overestimated by 18.9 million bushels.

The first three estimates of the 1945 wheat crop in the Prairie Provinces and the final estimate of the 1944 crop are as follows:

	1945 Crop			1944 Crop	
	1st Estimate	2nd Estimate	3rd Estimate	Final Estimate	
entre () at the case of the same of the same of the case of the c		- 000 bush	els -		
Manitoba	45,000	43,000	40,000	50,300	
Saskatchewan	167,000	158.000	162,000	242,100	
Alberta	85,000	83 ₁ 000	80,000	99,300	
Total	297,000	284,000	282,000	391,700	

FINAL ESTIMATE OF THE 1944 WHEAT CROP IN THE PRAIRIE PROVINCES

The third estimate of the 1944 wheat crop in the Prairie Provinces, which was made in January 1945 has been reduced from 410.6 million bushels to the present and final estimate of 391.7 million bushels. This revision has been made in the light of the following data on the disposition of the crop.

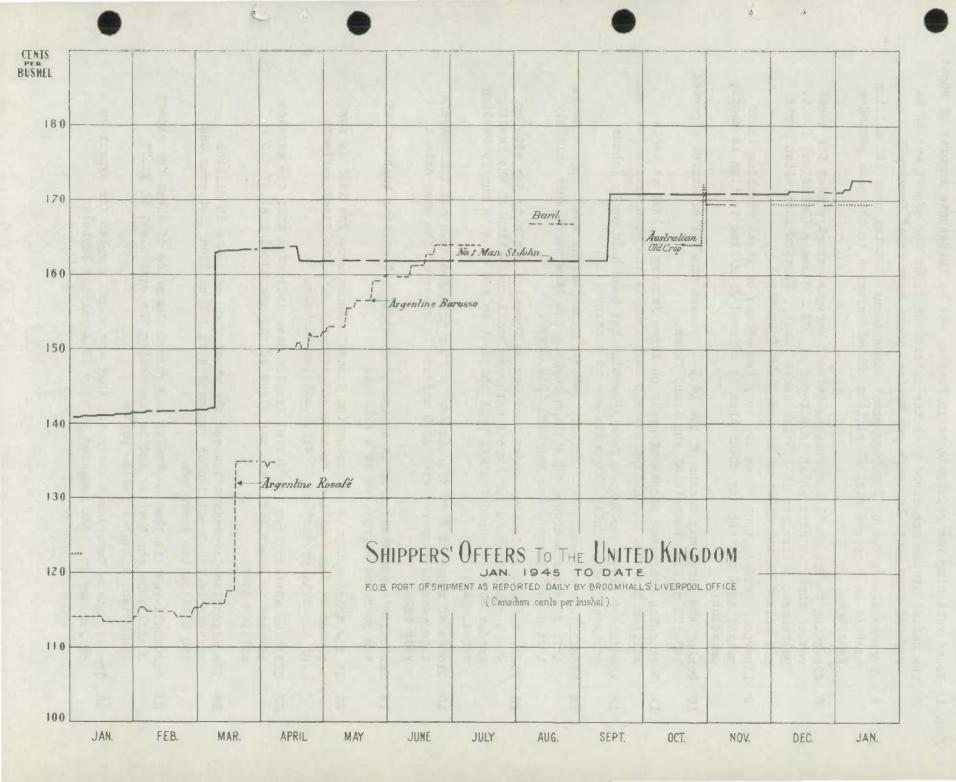
	Manitoba	Saskatchewan	Alberta	Prairie Provinces
		- 000 bu	shels -	
Carry-over on farms, July 31, 1944 . Final Estimate of 1944 crop	3,000 50,300	26,200 242,100	23,650 99,300	52,850 391,700
Total Supply	53,300	268,300	122 950	444,550
Disposition:				
Deliveries Seed	41,849 2,751 5,700 1,000 2,000	218,305 16,979 14,500 1,516 17,000	92,540 8,538 13,000 872 8,000	352,694 28,268 33,200 3,388 27,000
Total Disposition	53,300	268,300	122,950	444,550

CHICAGO WHEAT FUTURES

May futures on the Chicago market continued at ceiling prices, while deferred new crop positions remained close to the season's previous highs and near maximum levels. As a result, little activity was in evidence on the market. Buying was discouraged because of limited profit possibilities, unless ceilings are raised. Selling was unattractive because of heavier distribution of wheat supplies than earlier indicated and the possibility of smaller year-end carry-over stocks than at first anticipated. The official report of the enormous disappearance of farm-held wheat stocks, due to the heavy live-stock feeding, has caused considerable agitation in milling and trade quarters to halt or cut down the export program on wheat.

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

1945-46	May	July	September	December
		(cents and e	eighths per bushel)	
December 20	180/4	177/2	174/4	174
21	180/4	177/7	175	174
22	180/4	178/3	175/4	174
24		Market	Closed	
25		Christmas	Day	
26	180/4	179/1	175/4	174/1
27	180/4	179/4	176/2	174/4
28	180/4	179/4	176/4	174/7
29	180/4	179/2	176/3	174/5
31	180/4	179/4	176/7	175/1
January 1		New Year's Da	y	
2	180/4	177/2	174/5	173
3	180/4	177/4	175/2	173/7
4	180/4	176/5	174/4	173
5	180/4	176/6	174/5	173/3
7	180/4	176/3	174/4	173/5
8	180/4	177/1	175/2	174/4
9	180/4	177/4	175/5	174/5
10	180/4	177/4	175/5	174/7
11	180/4	177/4	175/5	174/7
12	180/4	178	176/2	175/3
14	180/4	178/3	176/4	175/7
15	180/4	178/4	176/4	175/5
16	180/4	178/6	176/6	176
17	180/4	179/2	177/4	176/4
18	180/4	180	178/3	178
19	180/4	179/6	178/3	178
21	180/4	179/6	178/1	177/5
22	180/4	180/4	179/2	179/2
23	180/4	180/4	180/1	179/5
24	180/4	180/4	180/3	180/2
25	180/4	180/4	180/4	180/2



CALENDAR OF WHEAT EVENTS

- Jan. 1 Bread rationing was reintroduced in France, due to inadequate imports of wheat.
 - 2 The United States announced that the subsidy on flour for export was to be reduced from 15 to 12 cents per hundred pound sack as of January 3.
 - 4 Overseas clearances of Canadian wheat since August 1 total over 145 million bushels as compared with 63 million bushels cleared in the same period a year ago.
 - 8 According to Broomhall comparisons between various export prices for wheat reveal that Canadian wheat is offered at 174 3/8 cents (Canadian) f.c.b. Baltimore, Australian at 169 1/4 cents f.o.b., Western Australian ports and United States wheat at around \$2.15 (Canadian).
 - 9 Liverpool reveals that there are very few offers of wheat reaching their market just now and any wheat that is offered from time to time is mostly Canadian.
 - 10 During the first six months of the 1945-46 season the United States exported 165-175 million bushels of wheat and flour.
 - 11 Washington estimated stocks of grain on farms January 1, 1946 at 368.8 million bushels, 22 million bushels less than at the same date a year ago.
 - 12 Loading of grain for export from Argentina has been held up by labour strikes, consequently shipments are at a standstill.
 - 14 Broomhall's correspondent in Italy reports that Italian wheat import needs this season are around 92 million bushels but it appears very unlikely that actual imports can approach this level.
 - 16 There was a lull in the export business in Canadian grain to-day with no wheat reported sold for export although small quantities of the feeding grades were released for all rail shipment to the east to supply feeding requirements.
 - 18 Stocks of wheat at Fort William-Port Arthur totalled 17.2 million bushels this year as compared with 46.5 million in store at the same date a year ago.
 - 19 Australia's new wheat crop is estimated at about 135 million bushels and the year-end carry-over at 6 million.
 - 22 In the third estimate of production Canada's wheat crop for 1945 is now placed at 305.9 million bushels and compares with the final estimate of the 1944 production of 416.6 million bushels.
 - 23 Official advices from the United Kingdom have indicated that the acreage planted to wheat last fall was close to the announced goal of 2.5 m million acres.
 - 24 The Argentine Government lowered the wheat crop estimate 16 million bushels to 149.5 million as compared with 150 million last year and 250 million two years ago.
 - 25 Broomhall reports that Australia has raised the price of wheat for export 2 shillings per quarter and is now asking the equivalent to \$1.75 (Canadian) a bushel f.o.b. ports.
 - 28 The Argentine Government estimates that the wheat surplus for export as of January 15, 1946 amounted to only 69.4 million bushels.

UNITED STATES

The Bureau of Agricultural Economics in its November-December issue of the Wheat Situation estimates that if the same or greater amounts of wheat and flour are exported during the last six months of the present crop year (January-June) than were exported during the first half, the carry-over of wheat in the United States at July 1, 1946 will be reduced to around 200 million bushels or less, and compares with the previous carry-over estimate of 300 million bushels. It is estimated that during the period July-December the equivalent of 165 to 175 million bushels of wheat and flour were exported.

In addition to the consideration of the size of exports, the projected carry-over for July 1, 1946 is based on the following supply and disappearance figures which are compared with figures for the 1944-45 season.

	1944-45	million bushels	1945-46	
Carry-over July 1	317 1,072 42		281 1,123 10	
Total Supply	1,431		1,414	
Domestic Disposition - Food	559 275 81 96		540 200 84 25	
Exports	139		365	1/
Total	1,150		1,214	
Carry-over June 1	281		200	

1/ Estimate.

The most uncertain item of disappearance is the quantity of exports. The Bureau goes on to say that during the past six months exports of winter wheat from the Gulf have drawn very heavily on supplies in Texas and Oklahoma, and loadings at Duluth before navigation closed on December 8 drew very heavily on available nearby supplies of spring wheat. In the next half year it will be increasingly necessary to go farther inland. To do this, more railway cars will be needed together with a minimum loss of time from labour and other difficulties. At the same time, the movement of wheat from farms and country elevators must be greatly increased.

At the present time every effort is being made to obtain cars to move the large quantities of wheat to the Atlantic seaboard as well as to the Gulf and to work as much wheat out of the Pacific Northwest as possible. After the turn of the year, sales by growers are expected to be substantially increased. In the event that all exportable supplies of wheat are made available, it is thought that the United States would be in a position to export 225 million bushels in the January-June period. This would leave a carry-over of about 175 million bushels, a sufficient amount in the light of present prospects for above-average yields next year.

The revised estimate of production now places the United States 1945 wheat crop at 1,123 million bushels, which, while about 27 million bushels below the October preliminary figure, is still 51 million bushels above the previous all-time record established in 1944. The 688 million acres seeded this year is about 3.3 million acres more than the 1944 total, the largest since 1938. Yield per seeded acre was 16.3 bushels as compared with 16.4 bushels in 1944.

Crap Conditions

The monthly crop report of the Ministry of Agriculture appeared on January 7 and reports as follows on crops at the end of December:

"During the early part of the month the scanty rains permitted the harvesting and threshing of the light grain crops to be carried out actively, but the lack of moisture was unfavourable for the growing crops and for field work. During the second half of the month the situation changed completely when rains permitted further sowings of maize. There was some hail damage to the maize crop in the Province of Buenos Aires and South-West of Entre Rios. Strong winds and high temperatures were also unfavourable. The locusts did not do much damage to wheat and linseed but, on the other hand, they caused considerable deterioration to the maize in Santa Fe, Cordoba, Entre Rios and Corrientes.

"Wheat harvesting has been completed in Cordoba, Santa Fe, the north of Buenos Aires, Entre Rios and the Fampa Yields, though better than last year, are below normal due to insects and other unfavourable factors. In the north of Buenos Aires yields vary between 13 and 26 bushels per acre, in the Centre between 12 and 18 bushels per acre and in the east and west between 6 and 16 bushels per acre. In other provinces they are generally low and qualities below normal.

"Linseed has deteriorated somewhat owing to drought conditions during the first half of December. The damage was increased by locusts, strong winds and excessive heat. Harvesting became general during the month, excepting in the centre and south of Buenos Aires and the centre and east of the Pampa where it has not yet commenced. Yields are lowest in the centre and east of Santa Fe where locusts reduced the yields in some fields to as low as 5 to 6 bushels per acre. In the same districts fields which escaped damage produced as high as 18 bushels per acre. In Buenos Aires yields vary between 10 and 19 bushels per acre.

"By the end of December the sowing of maize had been completed with the exception of the later varieties which are still being put into the ground. The condition of the crop is considered from fair to good and it is probable that the last rains will produce a favourable reaction in districts which were suffering from drought. The crop has suffered various degrees of damage from locusts in Cordoba, Entre Rios, Corrientes, the Pampa and Santa Fe."

Production Estimates

The official estimate of crop production with comparative figures for the last three years are given as follows in bushels:

	Wheat	Flaxseed	Oats	Barley	Rye
1946	165,734,000	55,157,000	64,215,000	46,481,000	16,338,000
1945	150,083,000	30,984,000	75,721,000	26,318,000	7,441,000
1944 .1	249,832,000	61,929,999	63,732,000	33,034,000	21,929,000
1943	235,136,000	60,039,000	39,962,000	16,075,000	5,905,000

Owing to the disappointing yields in many areas and the large proportion of light-weight grain, many observers associated with the grain trade were of the opinion that the outturn of wheat this year would be almost 20 million bushels less than first official estimates. At the same time, they were doubtful whether the linseed crop would exceed 40 million bushels as compared with the first estimate of 55.2 million bushels.

Supplies and Markets

On December 15 the Argentine Government released its first estimate of the 1946 exportable wheat surplus which was placed at 80.6 million bushels. In the event that trade circle estimates should prove to be correct, this amount may be substantially reduced. Even when viewed in the light of present official surplus estimates, it will be seen that exports during the coming year will fall short of the 1944 and 1945 exports of wheat and wheat flour which totalled over 93 million bushels in each year. During each of these years non-European countries imported in the neighbourhood of 50 million bushels with a very large percentage going to other South American countries. With present prospects of this trade continuing during the coming year, it would appear that the quantity shipped to Europe will be much smaller than the 40 million bushels sent during the past two years.

Market Prices

Prices on the Argentine grain market have risen considerably in recent weeks, particularly in the case of oats, barley and rye. This rise is attributable to good demand and the inability on the part of producers to deliver their forward sales, because of crop failures in some cases and in others to lack of transport. Recently, offers of new maize have fallen off considerably as farmers fear their crops may be lost owing to locust damage. Shippers are offering \$14.70 per 100 kilos f.a.s. Buenos Aires, but can only buy very small quantities.

AUSTRALIAN CABLE

The following cable was received from the Canadian Government Trade Commissioner at Melbourne on January 16.

"Australian wheat stocks at the end of December totalled 70 million bushels, including new-crop wheat. As yet harvesting has not been completed.

"A conference is being held this week of Federal and State Ministers of Agriculture to discuss proposals for a five-year plan to stabilize the wheat industry. The plan includes (a) a guaranteed price of five shillings twopence (Australian), approximately 92 cents (Canadian), a bushel f.o.b. bagged for all wheat marketed in Australia (b) a guaranteed price to growers of five shillings twopence f.o.b. bagged for all F.A.Q. wheat exported during the five seasons 1945 to 1950 (c) continuation of Australian Wheat Board as a central marketing organization (d) control of acreages (e) when export prices exceed the guaranteed price a stabilization contribution by the industry of 60 per cent of such excess is to be paid into a fund to assist in meeting the guarantee when export prices are below it."

GRADING OF 1945 WHEAT

The following table sets forth the grading of wheat inspected during the four-month period August to December 1945:

	Cars	Per Cent
No. 1 Northern	34,898	32.61
No. 2 Northern	42,865	40.05
No. 3 Northern	9,742	9.10
No. 4 Northern	2,495	2.33
Carnet	1,015	.95
Amber Durum	1,727	1.61
Alberta Winter	318	.30
Toughs	11,410	10.66
All others	2,562	2.39
Total	107,032	100.00

SELLING PRICES OF CANADIAN WHEAT

The export price of Canadian wheat to overseas destinations remains unchanged at \$1.55 per bushel, basis No. 1 Northern in Store Fort William-Port Arthur or Vancouver.

The monthly averages of Canadian Wheat Board prices are as follows:

	1 Northern	2 Northern	3 Northern	4 Northern
		(cents and eighth	as 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
Maypoursesson	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	139/6
February	150/1	147/1	145/1	144/1
March	152/3	149/3	147/3	146/3
April	153/5	150/5	148/5	147/5
May	154/4	151/4	149/4	148/4
June	155	152	150	149
July	155	152	150	149
August	155	152	150	149
September	155	152	150	149
October	155	152	150	149
November	155	152	150	149
December	155	152	150	149
January 1, 1946-January 23	155	152	150	149

CANADIAN SUPPLY POSITION

As will be noted below several revisions have been made in the Canadian wheat supply position for each of the two crop years 1944-45 and 1945-46. The final estimate of Canada's 1944 wheat production of 416.6 million bushels lowers the total 1944-45 supply by some 18.9 million bushels. Revised estimates of domestic disposition now raise domestic requirements for that year by 8.6 million bushels to leave a total supply available for export or carry-over of 604.5 million bushels.

The third estimate of the 1945 wheat production is now placed at 305.9 million bushels to give a total supply of 564.3 million bushels for 1945-46. Domestic requirements for the current crop year have been lowered by 10 million bushels owing to a reduction in live-stock numbers and consequent smaller estimate of feed needs, to give a supply of 414.3 million bushels in 1945-46 for export or carry-over.

During the first five months of the present crop year 176.5 million bushels of wheat and wheat flour in terms of wheat have been exported to leave a balance on hand for export or carry-over at July 31, 1946 of some 237.8 million bushels. For the corresponding period last year 118.0 bushels of wheat and wheat flour were exported to leave a balance on hand at January 1 for export or carry-over into 1945-46 of 486.5 million bushels more than twice the amount available at January 1 of this year.

Canadian Wheat Supplies

	1945-46	1944-45
	million b	ushels
Carry-over in North America July 31	258.4 305.9 <u>1</u> /	356.5 416.6
Total Supply	564.3	773.1
Estimated domestic requirements	150.0 1/	168.6
Available for export or carry-over	414.3	604.5
Deduct: Overseas clearances of wheat as grain Aug. 1 - Dec. 31	145.6	63.0
United States imports of Canadian wheat	8.0 2/	31.2 30.8
Total wheat exports	153.6	94.2
Exports of wheat flour in terms of wheat Aug.1 - Dec. 31	22.9	23.8
Total exports wheat and wheat flour	176.5	118.0
Balance on Jan. 1 for export or carry-over	237.8	486.5

^{1/} Subject to revision.

^{2/} Estimate.

FARMERS' MARKETINGS

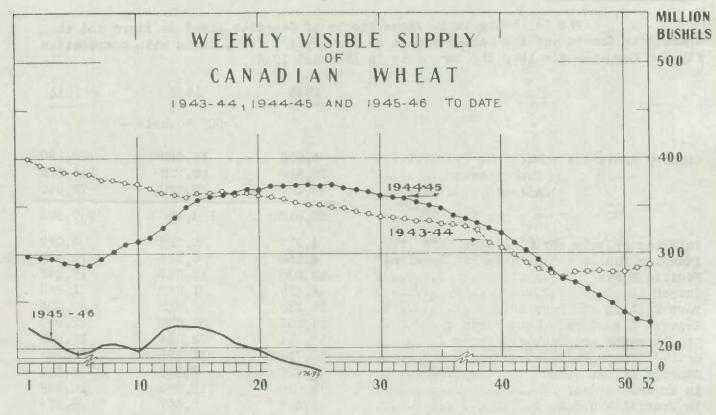
The following table shows primary receipts of wheat in the Prairie Provinces for the 1945-46 crop year along with comparative figures for 1944-45:

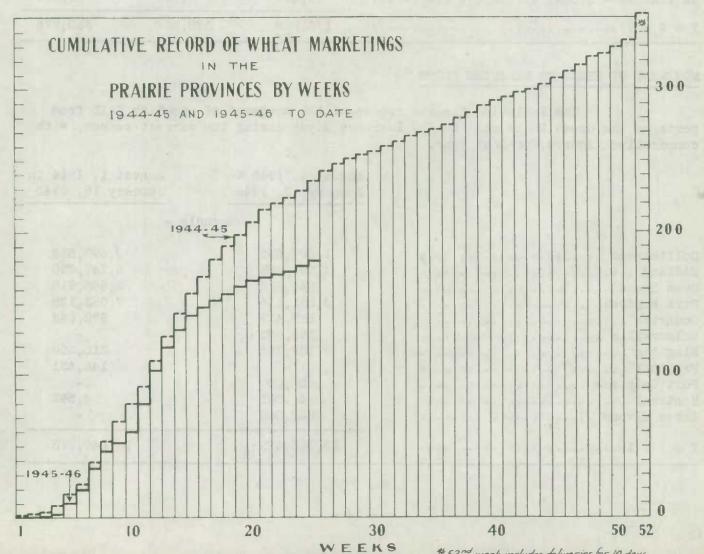
Week endi	ng	Manitoba	Saskatchewan	Alberta	Totals	Last Year
	19 34			oushels -		
August	1-2	quib	_	112,355	112,355	1,643,649
	9	29,396	79,152	137,853	246,401	1,070,379
	16	8,686	123,772	249,883	382,341	2,045,803
	23	96,463	755,302	921,069	1,772,834	5,368,793
	30	1,271,860	4,568,677	1,685,584	7,526,121	6,832,745
September	6	2,240,434	4,665,078	2,139,568	9,045,080	7,218,921
	13	2,444,009	9,681,705	3,518,952	15,644,666	15,518,385
	20	963,800	7,020,619	3.844,220	11,828,639	14,619,037
	27	444,784	3,974,279	1,024,858	5,443,921	12,662,549
October	4	2,067,492	3,428,517	1,613,780	7,109,789	12,429,817
	11	4,198,777	10,147,043	5,647,547	19,993,367	12,129,372
	18	2,686,475	14,274,064	7,079,466	24,040,005	17,889,562
	25	1,236,158	9,375,221	5,120,006	15,731,385	17,118,910
November	1	1,275,290	7,071,685	3,256,083	11,603,058	16,813,108
	8	983,850	7,259,954	2,266,876	10,510,680	13,202,329
	15	548,654	3,401,162	1,403,183	5,352,999	12,283,645
	22	563,398	2,927,636	1,249,802	4,740,836	11,730,036
	29	397,061	2,758,969	1,348,822	4,504,852	9,797,987
December	6	415,040	3,220,454	1,322,269	4,957,763	7,101,707
	13 1/	418,686	2,385,278	1,071,454	3,875,418	8,794,546
	20	222,497	1,305,273	846,361	2,374,131	8,727,864
	27	179,247	1,164,776	688,466	2,032,489	4,990,520
January	3	200,023	1,416,085	492,204	2,108,312	3,514,237
	10	565,523	2,628,773	1,493,312	4,687,608	4,729,367
	17	395,218	2,461,931	1,304,765	4,161,914	7,209,926
Total		23,852,821	106,095,405	49,838,738	179,786,964	235,443,194

^{1/} Revised.

Up to January 17 of the current crop year farmers in the Prairie Provinces had marketed a little less than 180 million bushels of wheat as compared with over 235 million bushels delivered during the corresponding period a year ago.

When the third estimate of the 1945 Prairie wheat production of 282 million bushels is added to the July 31, 1945 farm carry-over of 27 million bushels, the total supply position amounts to some 309 million bushels. After deducting a revised estimate of some 54 million bushels for feed, seed and country millings, approximately 255 million bushels remain for marketing or carry-over. Since nearly 180 million bushels have already been delivered, 75 million bushels are left for marketing during the remainder of the crop year and for carry-over at July 31, 1946.





WHEAT VISIBLE SUPPLY

The following table shows stocks of Canadian wheat in store and in transit in Canada and the United States on January 17, 1946, along with comparative figures for approximately the same date in 1945 and 1944:

	1946	1945	1944
		- 000 bushels	and .
Country Elevators - Manitoba	3,905 25,615	16,655 88,720	27,190 106,355
Alberta	29,290	68,820	75,960
Total	58,810	174,195	203,000
Interior Private and Mill Elevators	4,917	5,318	5,079
Interior Public and Semi-Public Terminals	4,150	9,597	11,027
Pacific Ports	10,200	18,359	15,542
Churchill	1,878	1,878	1,878
Fort William and Port Arthur	17,230	46,512	20,059
Eastern Elevators - Lake Ports	24,232	35,738	27,954
St. Lawrence and Seaboard Ports	12,854	23,354	12,982
United States Ports	20,754	31,755	23,826
Storage Afloat	5,929	7,558	6,191
In Transit - Rail	9,538	10,666	10,669
In Transit - U.S.A	6,497 8	7,607	6,064
Total	176,989	372,537	350,776

MOVEMENT OF WHEAT TO MARITIME PORTS

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

	August 1, 1945 to January 17, 1946	August 1, 1944 to January 18, 1945
	- bushe	ols -
Collingwood Midland Owen Sound Port McNicoll Goderich Walkerville Kingston Prescott Port Colborne Montreal Three Rivers	1,099,955 4,296,963 845,918 5,851,116 597,473 195,873 187,796 50,000 41,385 220,000	2,698,534 6,747,230 2,668,918 7,093,125 970,042 310,000 148,431
Total	13,386,479	20,640,873

WHEAT SHIPMENTS TO THE UNITED STATES

With the close of navigation the movement of Canadian wheat into the United States displayed a decided decline. From the middle of December until the middle of January total shipments amounted to 765,794 bushels as compared with some 1.6.2 million bushels during November and December and 13.1 million bushels in October and November.

The amount of wheat moved into the United States since August 1, 1945 totals 59.6 million bushels as compared with 74.2 million for the corresponding period a year ago. So far during the current crop year, Buffalo has received 47.2 million bushels or almost 80 per cent of total shipments. Approximately 12 million bushels of the 59.6 million shipped is still held in American positions; the remainder has been re-exported as wheat or flour or retained for domestic consumption in the United States. Imports into the United States during 1945-46, as estimated by the Bureau of Agricultural Economics, may be in the neighbourhood of 15 million bushels as compared with 42.1 million bushels during 1944-45.

An examination of the grades shipped since August 1 indicates that No. 1 Northern has predominated at about 47 per cent of the total and No. 2 Northern a close second at 43 per cent. The remainder has been made up of other grades including Durum.

Shipments August 1 - January 17

	1946 - bush	1945 els -
By Vessel		
U. S. A. Pacific Ports	47,211,121 331,494	686,666 38,462,390 7,746,957
Duluth-Superior Brie Milwaukee Oswego Toledo	6,719,050	5,479,526 8,365,922 677,554 1,615,403 4,829,371
Total - Vessel Shipments	54,276,665	67,863,789
By Rail		
Seaboard Ports		5,562,8 3 9 779,408
Total - Rail Shipments	5,358,840	6,342,247
GRAND TOTAL	59,635,505	74,206,036

RAIL MOVEMENT FROM FORT WILLIAM-FORT ARTHUR

With the close of navigation on the Great Lakes, the usual seasonal increase in wheat movement by rail from the Lakehead was quite apparent during the month of December. Total rail shipments amounted to some 2.3 million bushels, the largest December movement since 1942 when approximately 3.9 million bushels were shipped. With the present keen export demand, rail shipments will in all likelihood remain heavy until the opening of navigation.

Out of the total rail shipments last month, about 45 per cent or more than a million bushels were consigned to Nova Scotia. During the month, 402,000 bushels of No. 1 Northern were shipped from Fort William-Port Arthur, all of which were consigned to Nova Scotia and comprised over 40 per cent of total movement to that province.

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

	1945-46	1944-45	1943-44	1942-43			
	- bushels -						
August	23,255 57,533	91,891 169,603	990,879 1,547.042	390,264 600,921			
October	73,776 99,197	86,572 97,512	780,035 711,238	644,926 1,250,952			
December	2,280,636	1,236,339	898,565	3,871,297			
February		1,936,038	4,364,158 4,397,318	1,757,163			
April		1,091,909	1,076,142	1,997,275 3,968,148			
June		66,154 58,642	271,533 108,739	1,135,059 999,605			
July		52,726	47,516	983,324			
Total (12 months)		5,848,057	15,300,422	20,795,182			

The grades of wheat shipped during December 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.
		- bus	shels -		
-	-	-	422,000	-	-
-	_	588,000	604,000	-	126,000
254,900	190,414	17,467	9,483	3,400	100
2,000	1,000	-	-	-	_
10,500	-	-	- 700	- 01	4865
_	4,972	-	-	-	-
21,500	-	-			5 - II - 500
18,000	600	-	-	-	_
6,000	-	-	600	-	600
EU: - 1	1,000	10-15		-	
312,900	197,386	605,467	1,035,483	3,400	126,000
	254,900 2,000 10,500 21,500 18,000 6,000	254,900 190,414 2,000 1,000 10,500 - 4,972 21,500 - 18,000 - 6,000 - 1,000	Ontario Quebec Brunswick - bus 588,000 254,900 190,414 17,467 2,000 1,000 - 4,972 21,500	- bushels - 422,000 - 588,000 604,000 254,900 190,414 17,467 9,483 2,000 1,000 4,972 4,972 21,500 6,000 1,000 1,000	Ontario Quebec New Brunswick Scotia Edward Island - bushels - 422,000 588,000 604,000 - 254,900 190,414 17,467 9,483 3,400 2,000 1,000 10,500 4,972 21,500 18,000 18,000 1,000

During the first quarter of the present crop year the amount of wheat moving into eastern Canada and British Columbia for feeding purposes under the Federal Freight Assistance Policy totalled over 8.8 million bushels and compares with the 9.5 million bushels shipped under this plan for the corresponding period a year ago. With the exception of Ontario and Prince Edward Island all of the feed deficit provinces revealed a decline in the amount of wheat received from the Prairie Provinces. In keeping with her needs, Ontario has had to step up feed-grain imports from western Canada in order to supplement her inadequate domestic supplies.

The provincial distribution is shown in the following table, by months, with comparative totals for the crop year 1944-45.

1945-46	Ontario	Quebec	New Brunswick	Nova Scotia	Prince Edward Island	British Columbia	Total
			- b	ushels -			
August	1,158,468	861,583	74,142	81,257	66,820	350,508	2,592,778
September	1,023,323	847,588	94,768	89,488	51,017	334,753	2,440,937
October	1,164,820	886,072	83,698	80,008	34,008	354,543	2,603,149
November	605,900	408,327	27,260	41,150	18,732	73,684	1,175,053
Total	3,952,511	3,003,570	279,868	291,903	170,577	1,113,488	8,811,917
Same Period 1944-45	3,804,170	3,387,986	332,786	483,305	154,617	1,344,791	9,507,655

MILLFEEDS

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

	August 1, 1945 to November 30, 1945	August 1, 1944 to November 30, 1944
	- tons	3 -
Ontario	61,182	75,735
Quebec	87,734	102,765
New Brunswick	16,010	17,718
Nova Scotia	16,370	24,162
Prince Edward Island	4,005	4,023
T o t a 1	185,301	224,403

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WHEAT AND WHEAT FLOUR

101068659	Overseas Clearances of Canadian Wheat	U. S. Imports of Canadian Wheat for consumption and milling in bond	Customs Exports of Canadian Wheat Flour	Total	Customs Exports of Wheat and Wheat Flou
148,500		- 0	000 bushels -		
1943-44					
August	13,926	8,744	5,047	27,717	23,143
September		9,332	3,933	22,215	21,426
October		12,597	3,824	23,845	23,791
November		11,429	3,860	23,189	28,733
December	-	9,802	4,979	25,420	43,022
January	· ·	14,178	5,063	30,197	22,336
February		20,704	3,844	33,525	24,655
March		14,529	5,518	27,906	20,566
April		24,979	6,943	41,316	40,092
May		15,420	7,090	36,658	40,009
June		8,617	5,999	26,336	31,061
July		9,497	4,490	25,431	29,640
Total	123,337	159,828	60,590	343,755	348,474
1944-45]					
		9,048	3,391	24,620	19,899
August	12,181	9,048 8,928	3,391 5,470	24,620 25,027	19,899 32,107
August	12,181	8,928	5,470	25,027	32,107
August September	12,181 10,629 14,115	8,928 6,187	5,470 4,908	25,027 25,210	32,107 33,624
August September October	12,181 10,629 14,115 17,427	8,928 6,187 4,879	5,470 4,908 4,417	25,027 25,210 26,723	32,107 33,624 27,601
August September October November December	12,181 10,629 14,115 17,427 8,671	8,928 6,187 4,879 2,129	5,470 4,908 4,417 5,591	25,027 25,210 26,723 16,391	32,107 33,624 27,601 32,815
August	12,181 10,629 14,115 17,427 8,671	8,928 6,187 4,879 2,129 1,447	5,470 4,908 4,417 5,591 3,781	25,027 25,210 26,723 16,391 16,605	32,107 33,624 27,601 32,815 8,944
August September October November December January February	12,181 10,629 14,115 17,427 8,671 11,377 14,750	8,928 6,187 4,879 2,129 1,447 752	5,470 4,908 4,417 5,591 3,781 4,642	25,027 25,210 26,723 16,391 16,605 20,144	32,107 33,624 27,601 32,815 8,944 11,998
August September October November December January February March	12,181 10,629 14,115 17,427 8,671 11,377 14,750 13,041	8,928 6,187 4,879 2,129 1,447 752 759	5,470 4,908 4,417 5,591 3,781 4,642 5,571	25,027 25,210 26,723 16,391 16,605 20,144 19,371	32,107 33,624 27,601 32,815 8,944 11,998 15,665
August	12,181 10,629 14,115 17,427 8,671 11,377 14,750 13,041 15,839	8,928 6,187 4,879 2,129 1,447 752 759 2,121	5,470 4,908 4,417 5,591 3,781 4,642 5,571 6,154	25,027 25,210 26,723 16,391 16,605 20,144 19,371 24,114	32,107 33,624 27,601 32,815 8,944 11,998 15,665 21,606
August	12,181 10,629 14,115 17,427 8,671 11,377 14,750 13,041 15,839 46,420	8,928 6,187 4,879 2,129 1,447 752 759 2,121 2,338	5,470 4,908 4,417 5,591 3,781 4,642 5,571 6,154 6,307	25,027 25,210 26,723 16,391 16,605 20,144 19,371 24,114 55,065	32,107 33,624 27,601 32,815 8,944 11,998 15,665 21,606 35,432
August	12,181 10,629 14,115 17,427 8,671 11,377 14,750 13,041 15,839 46,420 31,647	8,928 6,187 4,879 2,129 1,447 752 759 2,121	5,470 4,908 4,417 5,591 3,781 4,642 5,571 6,154	25,027 25,210 26,723 16,391 16,605 20,144 19,371 24,114	32,107 33,624 27,601 32,815 8,944 11,998 15,665 21,606
August	12,181 10,629 14,115 17,427 8,671 11,377 14,750 13,041 15,839 46,420 31,647 41,805	8,928 6,187 4,879 2,129 1,447 752 759 2,121 2,338 1,725	5,470 4,908 4,417 5,591 3,781 4,642 5,571 6,154 6,307 7,257	25,027 25,210 26,723 16,391 16,605 20,144 19,371 24,114 55,065 40,629	32,107 33,624 27,601 32,815 8,944 11,998 15,665 21,606 35,432 50,552
August	12,181 10,629 14,115 17,427 8,671 11,377 14,750 13,041 15,839 46,420 31,647 41,805	8,928 6,187 4,879 2,129 1,447 752 759 2,121 2,338 1,725 1,737	5,470 4,908 4,417 5,591 3,781 4,642 5,571 6,154 6,307 7,257 5,168	25,027 25,210 26,723 16,391 16,605 20,144 19,371 24,114 55,065 40,629 48,710	32,107 33,624 27,601 32,815 8,944 11,998 15,665 21,606 35,432 50,552 43,362
August	12,181 10,629 14,115 17,427 8,671 11,377 14,750 13,041 15,839 46,420 31,647 41,805	8,928 6,187 4,879 2,129 1,447 752 759 2,121 2,338 1,725 1,737	5,470 4,908 4,417 5,591 3,781 4,642 5,571 6,154 6,307 7,257 5,168	25,027 25,210 26,723 16,391 16,605 20,144 19,371 24,114 55,065 40,629 48,710	32,107 33,624 27,601 32,815 8,944 11,998 15,665 21,606 35,432 50,552 43,362 333,605
August	12,181 10,629 14,115 17,427 8,671 11,377 14,750 13,041 15,839 46,420 31,647 41,805 237,902	8,928 6,187 4,879 2,129 1,447 752 759 2,121 2,338 1,725 1,737 42,050	5,470 4,908 4,417 5,591 3,781 4,642 5,571 6,154 6,307 7,257 5,168 62,657	25,027 25,210 26,723 16,391 16,605 20,144 19,371 24,114 55,065 40,629 48,710 342,609	32,107 33,624 27,601 32,815 8,944 11,998 15,665 21,606 35,432 50,552 43,362 333,605
August	12,181 10,629 14,115 17,427 8,671 11,377 14,750 13,041 15,839 46,420 31,647 41,805 237,902	8,928 6,187 4,879 2,129 1,447 752 759 2,121 2,338 1,725 1,737 42,050	5,470 4,908 4,417 5,591 3,781 4,642 5,571 6,154 6,307 7,257 5,168 62,657	25,027 25,210 26,723 16,391 16,605 20,144 19,371 24,114 55,065 40,629 48,710 342,609	32,107 33,624 27,601 32,815 8,944 11,998 15,665 21,606 35,432 50,552 43,362 333,605
August	12,181 10,629 14,115 17,427 8,671 11,377 14,750 13,041 15,839 46,420 31,647 41,805 237,902	8,928 6,187 4,879 2,129 1,447 752 759 2,121 2,338 1,725 1,737 42,050	5,470 4,908 4,417 5,591 3,781 4,642 5,571 6,154 6,307 7,257 5,168 62,657	25,027 25,210 26,723 16,391 16,605 20,144 19,371 24,114 55,065 40,629 48,710 342,609	32,107 33,624 27,601 32,815 8,944 11,998 15,665 21,606 35,432 50,552 43,362 333,605

^{1/} Subject to revision. 2/ Estimate.