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

MONTHLY REVIEW OF THE WHEAT SITUATION

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

(Issued December 1946)

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WORLD WHEAT SITUATION

Cereal Grain Requirements Still High - New information coming to light during the current month emphasizes the urgent need for bread grains in the deficit areas. Rations in many European areas are dangerously low in calories and the situation is expected to deteriorate still further in several countries as domestic food supplies become exhausted. While quite substantial exportable wheat surpluses exist in Canada and the United States much difficulty is being experienced in both countries in moving the grain to export positions. Stocks in all forward positions were drained off during the first half of this year to meet the famine emergency in Europe and elsewhere. As a result, much valuable time had to be consumed in moving stocks of new crop grain into export positions. The situation has been further aggravated by strikes and other transportation bottlenecks which have slowed down movement of grain from country points through to the seaboard. In the United States the Maritime strike delayed ocean shipments, and in both Canada and the United States it is considered doubtful whether sufficient grain-tight boxcars are available to keep grain moving to the ports in the volume required to meet export programmes. With the official closing of navigation on the Great Lakes on December 12, an added burden will be thrown on the railways until the Lakes are open again in the spring.

North American Wheat Exports Down - Exports from both Canada and the United States during the past few months have lagged considerably behind the levels achieved last year. In 1945 Canada exported in the months of August to November inclusive some 153 million bushels of wheat and flour equivalent, while in the same period this year only 75 million bushels left the country. In the United States, exports from June to December inclusive in 1945 amounted to 195 million bushels, while it is estimated that this year something under 150 million bushels of wheat and flour equivalent will have moved out in the same period.

Rice Shortage Causes Added Drain on Wheat Supplies - The critical rice shortage now existing in many countries is expected to continue during 1947. Exportable supplies from the 1946-47 harvest are almost certain to remain far below the prewar volume, while rice stocks at the outset of the season are at an extremely low level, particularly in the heavy importing and consuming countries of the world. This situation will create further demands on the limited supplies of wheat available for export from the surplus-producing countries.

Argentine Situation - The first official estimate of production, issued December 10 placed the 1946 Argentine wheat crop at 218.3 million bushels, nearly 20 million bushels lower than recent trade estimates. There are no figures as yet available on year-end carry-over but it is not expected to be large. After meeting domestic requirements of perhaps 120 million bushels, and commitments to Spain and Brazil of 60 million bushels, Argentina will apparently be left with a relatively small exportable surplus.

Australian Situation - Latest advices from Australia indicate the new crop may run to some 115 million bushels, while wheat stocks at the end of November amounted to only 20 million bushels. Total supplies at December 1, therefore, may be estimated at 135 million bushels, some 15 million bushels less than were available on the same date in 1945. Assuming a domestic consumption of about 85 million bushels, some 50 million bushels may be available for export and carry-over during the season.

New Crop Prospects - The Crop Reporting Board of the United States Department of Agriculture has forecast a 1947 winter wheat production in that country of about 947 million bushels. The estimate is based upon conditions as reported at December 1, an appraisal of soil moisture conditions and other relevant factors. It is also assumed that weather conditions will remain 'normal' through the crop season. If realized, such a crop would exceed the record 1946 winter wheat crop by 73 million bushels. In the United Kingdom, frequent rains have prevented farmers from getting on the land and it is thought that much land intended for fall crops has not been worked. As a result, it would appear that a large percentage of the crop must be spring planted if the desired 1947 acreages are to be attained. Fall crops in western and central Europe have been reported in good condition and private sources indicate that acreages may be somewhat greater than for the 1946 crops.

Dominion-Provincial Agricultural Objectives Conference - The Conference met at Ottawa early in December to consider recommendations for agricultural production in 1947. The Conference concluded that 1947 harvests should bring cereal grain supplies within a reasonable measure of meeting requirements and noted that demand for live-stock products was increasing in the United Kingdom and Continental Europe. The Conference deemed it desirable that Canada should help supply these markets and accordingly recommended certain increases in live-stock production. To facilitate accomplishment of this objective, increases in coarse grain acreages were recommended along with a concurrent decrease in wheat acreage of about seven per cent.

Food and Agricultural Organization - World Food Appraisal - F.A. O. summarizes as follows its latest world food appraisal for the consumption year July 1946 to June 1947:

"A major food crisis still confronts the world. Over wide areas of China famine conditions have prevailed for many months. Many people in Europe are living on a diet of 1,500 calories or less, and the European situation will deteriorate sharply in the spring, since in several countries domestic food supplies will become exhausted. Meanwhile people in food exporting countries are eating better than prewar; the United States consumption in 1946-47 surpasses the record level of 1945-46.

"Nutrition and health are little better than last year and in some countries worse. Many people have been living from five to six years on a sub-normal diet and the cumulative effects are now becoming apparent. Surveys among certain groups have shown increasing instances of hunger, oedema, anemia and vitamin deficiency diseases. Infant mortality rates remain high and tuberculosis has become more prevalent. Food production in the war damaged areas of Europe, the U.S.S.R. and Orient is beginning to recover, but only slowly. In surplus-producing countries food output is higher this year than last year especially in North America, but because of transportation difficulties, because stocks have been largely depleted, because of price increases, decontrol and the termination of UNRRA, total food exports will be no more and possibly less in volume than

last year. The perspective situation in deficit countries in the coming months is such as to warrant an immediate tightening of controls and food economy measures in all countries and a reconsideration by exporting countries of the quantities they feel able to make available for shipment."

Much of the material used by F.A.O. in this appraisal has been drawn from information supplied by the International Emergency Food Council, the United States Department of Agriculture, UNRRA, the British Ministry of Food and other agencies.

CANADIAN SITUATION

Supply Situation - Exports of ~~flour~~ wheat and flour in terms of wheat amounted to approximately 25 million bushels during the month of November, bringing the total for the first four months of the crop year to just over 75 million bushels. An estimated 238.4 million bushels remain for export or carry-over at the end of the crop year. Export movement during this winter will be limited largely by the facility with which the railways can move grain from country points to the coasts. At the close of navigation more than half of the visible wheat stocks were located in country elevators with about six per cent in seaboard position. At the same time last year only 32 per cent of the then larger visible stocks was in country elevators, while 11 per cent was in seaboard positions.

Canadian Wheat Supplies

	<u>1946-47</u>	<u>1945-46</u>
	- million bushels -	
Carry-over in North America July 31	69.9	258.1
New Crop	418.8 <u>1/</u>	318.5 <u>2/</u>
Total Supply	488.7	576.6
Estimated domestic requirements	175.0	167.0 <u>2/</u>
Available for export or carry-over	313.7	409.6
Deduct:		
Overseas Clearances of wheat as grain Aug. 1 - Nov. 30	49.1 ✓	128.7 129.2
United States imports of Canadian wheat	1.1 ✓	5.7
Total wheat exports	50.2	134.4
Exports of wheat flour in terms of wheat Aug. 1 - Nov. 30 ...	25.1 ✓	18.6
Total exports wheat and wheat flour	75.3	153.0
Balance on December 1 for export or carry-over	238.4	256.6

1/ Subject to revision.

2/ Tentatively revised on the basis of disposition data.

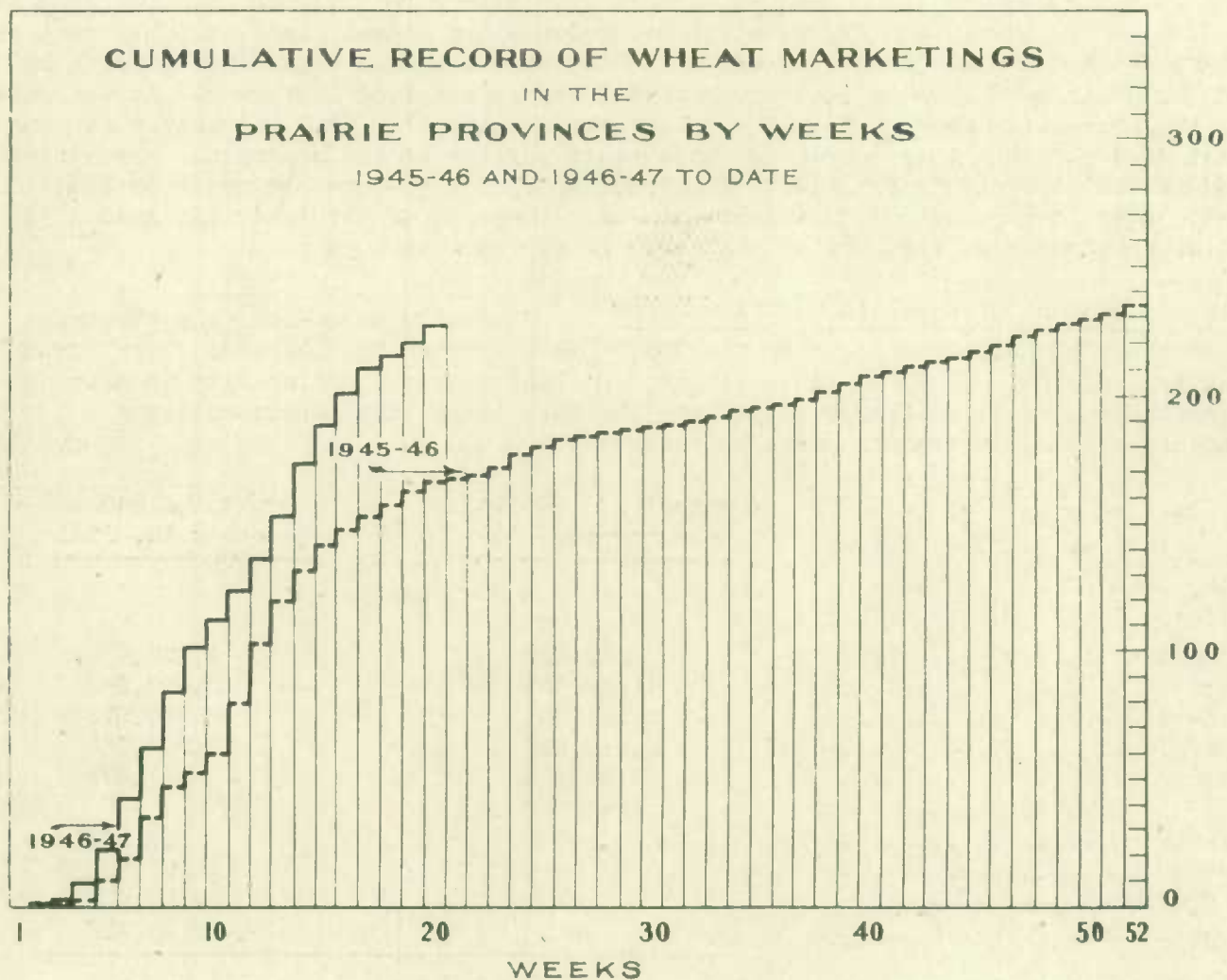
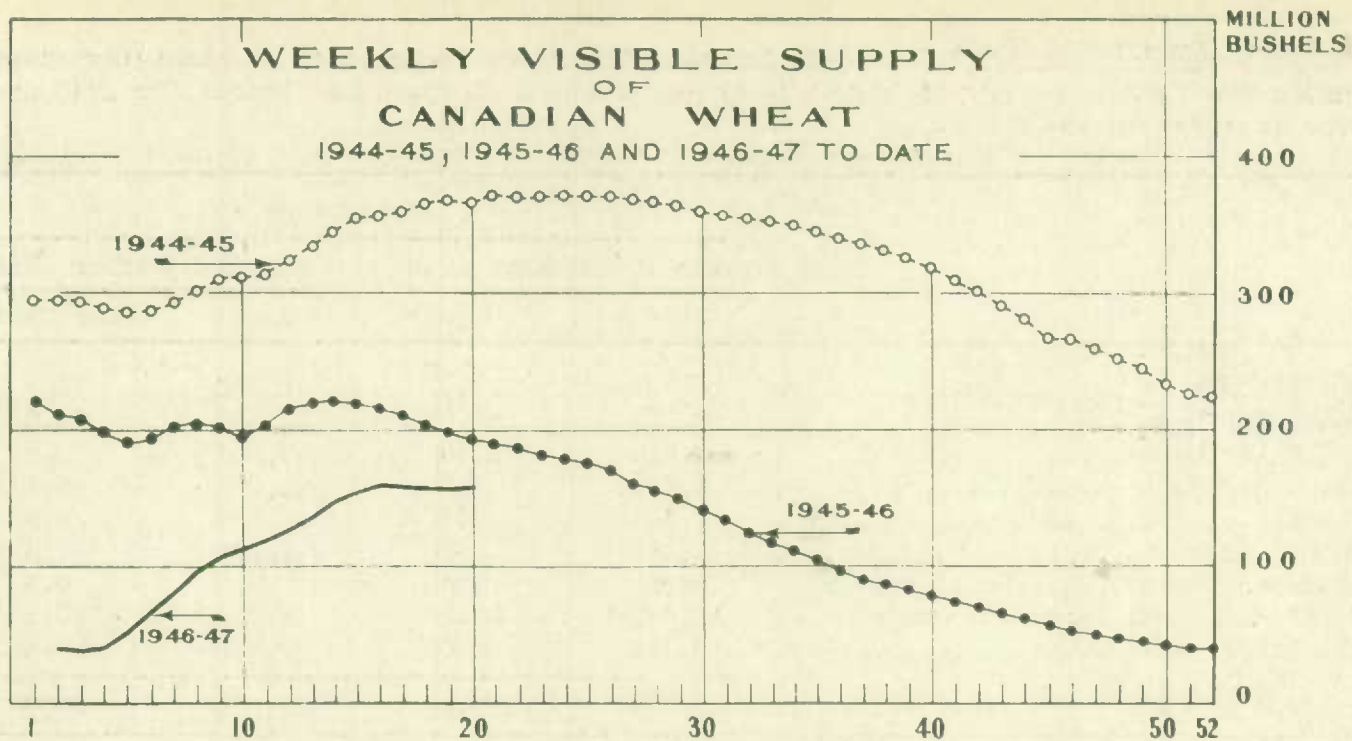
Farmers' Marketings - The following table shows primary receipts of wheat in the Prairie Provinces for the 1946-47 crop year along with comparative figures for 1945-46:

<u>Week ending</u>		<u>Manitoba</u>	<u>Saskatchewan</u>	<u>Alberta</u>	<u>Total</u>	<u>Last Year</u>
- bushels -						
August	1-8	225,324	396,627	797,492	1,419,443	358,756
	15	665,222	679,789	1,019,934	2,364,945	382,341
	22	1,700,523	2,026,729	1,585,626	5,312,878	1,772,834
	29	5,360,908	7,254,234	1,965,910	14,581,052	7,526,121
September	5	4,993,343	11,916,951	2,733,362	19,643,656	9,045,080
	12	4,653,986	12,712,510	2,283,827	19,650,323	15,644,666
	19	3,986,469	15,047,267	2,838,144	21,871,880	11,828,639
	26	1,892,442	9,173,163	5,246,998	16,312,603	5,443,921
October	3	1,313,287	6,231,719	3,248,141	10,793,147	7,109,789
	10	1,995,033	6,911,412	2,782,356	11,688,801	19,993,367
	17	734,685	4,983,080	6,632,554	12,350,319	24,040,005
	24	1,338,741	8,340,613	8,043,332	17,722,686	15,731,385
November	31	1,756,616	10,128,806	8,218,988	20,104,410	11,603,058
	7	1,246,737	7,731,400	5,989,216	14,967,353	10,510,680
	14	1,058,969	6,499,519	4,925,980	12,484,468	5,352,999
	1/ 21	1,044,603	5,411,116	3,505,063	9,960,782	4,740,836
December	28	785,594	2,026,657	1,958,926	4,771,177	4,504,852
	5	733,235	2,006,180	2,072,693	4,812,108	4,957,763
	12	786,538	2,727,931	2,504,628	6,019,097	3,875,418
T o t a l		36,272,255	122,205,703	68,353,170	226,831,128	164,422,510

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 December 12, 1946, along with comparative figures for approximately the same date in 1945 and 1944:

	<u>1946</u>	<u>1945</u>	<u>1944</u>
- 000 bushels -			
Country Elevators - Manitoba	5,825	3,645	14,480
Saskatchewan	40,490	26,485	86,715
Alberta	38,365	32,395	67,710
T o t a l	84,680	62,525	168,905
Interior Private and Mill Elevators	3,134	4,965	5,383
Interior Public and Semi-Public Terminals	354	4,963	8,093
Pacific Ports	8,449	10,041	17,982
Churchill	43	1,878	1,878
Fort William and Port Arthur	7,174	12,126	26,652
Eastern Elevators - Lake Ports	21,127	25,582	39,795
St. Lawrence and Seaboard Ports	2,389	13,915	23,866
United States Ports	5,138	29,045	39,013
Storage Afloat	-	12,110	12,104
In Transit - Lake	16,290	-	-
In Transit - Rail	9,589	13,729	18,038
In Transit - U.S.A.	40	6,500	6,860
T o t a l	158,407	197,379	368,569



Grading of Wheat - The following table shows the grading of wheat inspected during the four-month period August to November 1946. Comparable figures for 1945 are also included in the table.

	Inspections -			
	August-November 1946		August-November 1945	
	Cars	Per Cent	Cars	Per Cent
No. 1 Northern	11,704	13.9	31,760	34.7
No. 2 Northern	40,105	47.8	36,487	39.8
No. 3 Northern	9,618	11.5	7,863	8.6
No. 4 Northern	2,270	2.7	2,052	2.2
Garnet	364	0.4	569	0.6
Amber Durum	2,450	3.0	1,188	1.3
Alberta Winter	1,154	1.4	272	0.3
Tough - All varieties and grades	12,796	15.3	9,213	10.1
All Others	3,403	4.0	2,230	2.4
T o t a l	83,864	100.0	91,634	100.0

The generally lower grading of this year's crop relative to the 1945 crop is indicated by the percentage distribution of grades shown above. Only 13.9 per cent of inspections during the August to November period this year has graded No. 1 Northern as compared with a figure of 34.7 per cent for the same period last year. At the same time, the proportion grading Nos. 2 and 3 Northern amounts to 59.3 per cent this year against 48.4 per cent last year. As anticipated earlier in the season the percentage of toughs has increased sharply with the appearance of late-threshed grain on the market. Over 15 per cent of the August-November inspections this year has graded tough as compared with a figure of just over 10 per cent last year.

Movement of Wheat to Maritime Ports - The table below sets out the movement of wheat by RAIL from ports on the Great Lakes and the St. Lawrence river during the current season, with comparable figures for last year. The disparity in shipments between the two years continues to reflect the relatively tight transportation situation existing in eastern parts of the country.

August 1, 1946 to December 12, 1946	August 1, 1945 to December 13, 1945
--	--

- bushels -

Collingwood	101,830	199.394	1,098,455
Midland	1,619,726	2,217.770	3,697,982
Owen Sound	191,921		709,698
Port McNicoll	2,146,433	2,296.606	5,304,302
Coderich	94,628	122.658	597,473
Sarnia	165,023		-
Walkerville	-		195,873
Kingston	-		187,796
Port Colborne	-		50,000
Montreal	-		41,385
T o t a l	4,319,561	5,193.272	11,882,964

Wheat Shipments to the United States - Shipments of Canadian wheat to the United States between August 1 and December 12 lagged nearly 43 million bushels behind the quantity shipped in the same period a year ago. No movements by water were reported during the three weeks ending December 12, but over 200,000 bushels of wheat were routed by rail to U.S.A. seaboard ports.

Shipments August 1 - December 12

	<u>1946</u>	<u>1945</u>
	- bushels -	
<u>By Vessel</u>		
U.S.A. Pacific Ports	-	15,000
Buffalo	8,442,772	47,211,121
Chicago	-	331,494
Erie	2,948,382	6,719,050
Total - Vessel Shipments	11,391,154	54,276,665
<u>By Rail</u>		
U.S.A. Seaboard Ports	217,463 ^{1/}	4,508,445
Other U.S.A. Points	3,210	84,601
Total - Rail Shipments	220,673	4,593,046
GRAND TOTAL	11,611,827	58,869,711 ^{2/}

^{1/} Revised to date.

^{2/} Unrevised.

Lake Shipments of Canadian Grain from the opening of Navigation to Dec. 14 - With navigation closed on the Lakes, grain must now move to export positions by rail. Lake shipment of all grains this season amounted to 239.6 million bushels, the lowest movement since 1942. Despite substantial shipments of wheat during the month preceding the close of navigation the total quantity of this grain moved during the season amounted to only 147 million bushels, the smallest lake movement of wheat since 1938. Several factors have contributed to this situation, among them being the seamen's strike early in the navigation season and the low level of lakehead stocks during the summer as a result of the heavy export program in the first half of this year.

Shipments between Opening and Closing of Navigation

Year	Wheat	Oats	Barley	Rye	Flaxseed	Total
	- bushels -					
1940 ...	174,690,549	16,825,500	10,021,209	3,311,433	1,239,213	206,087,904
1941 ...	232,946,021	9,045,957	11,602,419	6,092,230	2,336,705	262,023,332
1942 ...	178,510,838	17,045,934	10,554,118	1,029,639	4,039,688	211,180,217
1943 ...	246,159,195	39,406,374	44,034,103	5,439,156	8,875,748	343,914,576
1944 ...	304,248,479	80,008,997	56,343,534	8,156,013	7,205,043	455,962,066
1945 ...	344,092,226	84,927,448	45,179,553	4,827,669	4,384,058	483,410,954
1946 ...	147,096,206	55,847,008	30,702,007	3,810,792	2,184,410	239,640,423

Rail Movement from Fort William-Port Arthur - Shipments of wheat by rail
from the Lakehead during November amounted to just over a quarter of a million bushels. This movement is greater than that for the same month last year but differs little from rail shipments in October of this year. Requirements for cars in the Western Division for the purpose of clearing country elevators and maintaining Lakehead stocks remained high during the month. After the closing of navigation in December, it may be anticipated that the usual seasonal increase will occur in rail shipments eastward from the Lakehead. Any such increase, however, may be limited by the continued heavy demand for box cars in the Western Division for the movement of grain from country elevators. It is also likely that considerable western wheat will be shipped to the Pacific Coast outlet to step up overseas shipments. By far, the greater part of the November shipments was consigned to Quebec. Nearly all of the wheat moving east by rail from the Lakehead in November was graded No. 4 Northern or lower.

Shipments month-by-month during the past four crop years are shown in the following table:

	<u>1946-47</u>	<u>1945-46</u>	<u>1944-45</u>	<u>1943-44</u>
	- bushels -			
August	187,825	23,255	91,891	990,879
September	175,773	57,533	169,603	1,547,042
October	255,754	73,776	86,571	780,035
November	256,249	99,197	97,512	711,238
December		2,280,636	1,236,339	898,566
January		4,533,707	1,936,038	4,364,157
February		1,127,764	764,629	4,397,318
March		2,223,266	1,091,909	1,076,193
April		1,015,730	196,042	107,257
May		536,462	66,154	269,533
June		920,233	58,642	108,739
July		130,276	52,726	47,517
Total - 12 Months		13,021,835	5,848,056	15,298,474

The grades of wheat shipped during November 1946 and the provincial distribution of this rail movement are shown in the following table:

	Ontario	Quebec	New Brunswick	Nova Scotia	U.S.A.
	- bushels -				
1 Northern.....	-	1,000	-	-	-
2 Northern	-	-	-	-	3,338
4 Northern	17,000	97,467	2,266	1,000	-
No. 5	1,011	17,600	-	-	-
Feed	15,000	20,000	-	3,167	-
Rejected 4 Northern	14,667	46,733	2,667	1,333	-
Rej. 4 Spec. Mxd. Htd. .	-	1,000	-	-	-
Smutty Rej. 4 Sample ...	-	1,000	-	-	-
1 C.W.A.D.	7,500	-	-	1,500	-
3 C.W.A.D.	-	1,000	-	-	-
T o t a l	55,178	185,800	4,933	7,000	3,338
GRAND TOTAL	256,249				

Freight Assistance Shipments - Claims filed to date for payment on freight assistance shipments during the first quarter of the crop year indicate that shipments to all provinces are down substantially in comparison with shipments for the same period a year ago. In connection with the 1946 data, however, it should be emphasized that the filing of late claims will necessitate upward revisions in the shipment figures. Thus, it may be expected that the decline in shipments may turn out to be less than the table now indicates. Ontario, Quebec and British Columbia absorbed most of the movement, with the Maritimes receiving relatively small amounts of the western wheat shipped under the freight assistance plan.

The provincial distribution of wheat shipments is shown in the following table, by months, with comparative totals for the crop year 1945-46:

1946-47	Ontario	Quebec	New Brunswick	Nova Scotia	Prince Edward Island	British Columbia	Total
- bushels -							
August	567,545	504,237	58,862	71,892	34,130	408,515	1,645,181
September	408,920	407,038	55,188	74,545	28,522	403,908	1,378,121
October	892,285	558,460	48,773	45,058	22,826	136,698	1,704,100
T o t a l	1,868,750	1,469,735	162,823	191,495	85,478	949,121	4,727,402
Same Period							
1945-46	3,417,886	2,685,248	273,670	274,426	160,757	1,062,488	7,874,475

Millfeed shipments on which claims have been filed under the freight assistance policy for the August-October quarter are somewhat below the level recorded for the same period a year ago. It is quite possible, however, that the filing of late claims may wipe out part or all of the decline. It will be observed that Quebec and Ontario received the major portion of the millfeeds moved under the freight assistance plan during the three-month period.

The provincial 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 three months of the present crop year and the other the corresponding period a year ago:

	<u>August 1, 1946 to October 31, 1946</u>	<u>August 1, 1945 to October 31, 1945</u>
- tons -		
Ontario	57,303	57,249
Quebec	74,819	81,237
New Brunswick	13,220	15,228
Nova Scotia	12,986	15,226
Prince Edward Island	3,749	4,009
T o t a l	162,077	172,949

Monthly Overseas Clearances, Etc., in Comparison with the Customs Exports of
Wheat and Wheat Flour

	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 Flour
- 000 bushels -					
<u>1944-45</u>					
August	12,351	9,043	3,391	24,785	19,899
September ...	11,798	8,940	5,470	26,208	32,107
October	15,428	5,758	4,908	26,094	33,624
November	14,658	4,891	4,417	23,966	27,601
December	9,972	2,169	5,591	17,732	32,815
January	14,730	1,413	3,781	19,924	8,944
February	10,858	766	4,642	16,266	11,998
March	13,890	763	5,571	20,224	15,665
April	22,703	2,157	6,154	31,014	21,606
May	39,351	2,499	6,307	48,157	35,432
June	34,366	1,725	7,257	43,348	50,552
July	38,322	1,737	5,168	45,227	43,362
T o t a l ...	238,427	41,861	62,657	342,945	333,605

<u>1945-46 1/</u>					
August	34,967	1,114	4,979	41,060	48,074
September ...	24,412	1,143	4,294	29,849	34,428
October	41,139	1,265	4,789	47,193	36,139
November	28,175	2,139	4,501	34,815	42,817
December	18,094	1,582	4,344	24,020	42,443
January	22,593	1,988	5,125	29,706	20,373
February	19,592	352	5,111	25,055	14,959
March	21,288	587	4,690	26,565	20,075
April	15,296	559	6,651	22,506	20,095
May	16,949	465	7,507	24,921	23,003
June	16,299	754	4,771	21,824	14,718
July	6,931	386	5,276	12,593	18,910
T o t a l ...	265,735	12,334	62,038	340,107	336,034

<u>1946-47 1/</u>					
August	5,981	227	8,897	15,105	17,339
September ...	10,134	1	5,563	15,698	11,338
October	12,474	600 <u>2/</u>	4,435	17,509	23,653
November	20,489	250 <u>2/</u>	6,156	26,895	23,008
T o t a l ...	49,078	1,078	25,051	75,207	75,338

1/ Subject to revision.

2/ Estimate.

Export Clearances of Canadian Wheat By Destination, August to November 1946.^{1/} -

The following statistics on monthly export clearances of Canadian wheat have been compiled by the Statistics Branch of the Board of Grain Commissioners:

Destination	August	September	October	November	TOTAL
<u>BRITISH EMPIRE</u> - bushels -					
Gr. Britain & Nor. Ireland	4,993,260	8,295,456	7,132,016	11,419,873	31,840,605
Eire	-	368,733	-	875,658	1,244,391
<u>Africa</u>					
British South Africa	446,455	389,600	340,000	632,590	1,708,645
<u>Asia</u>					
India	-	342,981	1,665,924	-	2,008,905
<u>Europe</u>					
Malta	186,667	186,667	168,000	181,097	722,431
<u>North America</u>					
British West Indies ^T _{st V}	-	1,000	2	2410	1,000
Barbados	-	1,000	2	4960	1,000
Jamaica	-	2,217	4983	3,418	5,229
Other W. Indies	-	-	2291	-	-
TOTAL BRITISH EMPIRE	5,626,382	9,487,254	9,305,940	13,111,630	37,531,206
		484,437	313,216	116,588	540,623
<u>FOREIGN COUNTRIES</u>					
<u>Africa</u>					
Egypt 2/	340,262	345,000	349,067	1,419,294	2,453,623
<u>Asia</u>					
Iraq-Iran 3/	-	298,573	-	334,000	632,573
<u>Europe</u>					
Belgium	-	-	1,164,933	936,876	2,101,809
France	-	-	-	325,126	325,126
Netherlands	-	-	672,000	1,673,977	2,345,977
Norway	-	-	284,200	933,521	1,217,721
Portugal	-	-	-	325,900	325,900
Switzerland	-	-	-	1,009,702	1,009,702
<u>North America</u>					
Dominican Republic	-	3,337	-	-	3,337
<u>South America</u>					
Brazil	-	-	698,133	345,099	1,043,232
Chile	-	-	-	37,437	37,437
Colombia	-	-	-	36,111	36,111
Ecuador	14,500	-	-	-	14,500
TOTAL FOREIGN COUNTRIES	354,762	646,910	3,168,333	7,377,043	11,547,048
GRAND TOTAL EXPORTED	5,981,144	10,134,164	12,474,273	20,488,673	49,078,284

1/ Compiled on Ocean Bill of Lading basis with exception of August exports (U.K., Iraq and Iran). Prepared from dates grain actually loaded on vessel or transferred from elevator to sacking bin.

2/ Discharged at the Port of Alexandria for distribution in the Red Sea area under London Food Council Program.

3/ Distributed under London Food Council Program in the Persian Gulf area.

Current Wheat Prices - The table below sets out weekly averages of both domestic and export prices of western Canadian wheat for the weeks ending November 30 through December 14. All prices have remained fixed with the exception of the commercial classification comprising wheat for export to countries other than the United Kingdom. Prices for this class of wheat have been at advanced levels since August 1, when the restriction was lifted on the export price to countries other than the United Kingdom. Since September 17, the commercial export price of Durum wheat has been quoted at a substantial premium over the commercial export price of other varieties. Fluctuations in the commercial price of Class II wheat are closely related to price changes on the principal American wheat markets.

		Average Prices for the weeks ending -		
		November 30	December 7	December 14
		- cents and eighths per bushel -		
Wheat <u>1/</u>				
(1) Class I Domestic				
(A) Domestic Use				
1 Hard	125	125	125	
1 Northern	125	125	125	
2 Northern	122	122	122	
3 Northern	120	120	120	
4 Northern	115	115	115	
Number 5	112	112	112	
Number 6	108	108	108	
Feed	106	106	106	
1 C. W. Garnet	120	120	120	
2 C. W. Garnet	118	118	118	
3 C. W. Garnet	116	116	116	
1 Alberta Red Winter	135	135	135	
2 Alberta Winter	134	134	134	
3 Alberta Winter	131	131	131	
1 C. W. Amber Durum	135	135	135	
2 C. W. Amber Durum	132	132	132	
3 C. W. Amber Durum	130	130	130	
(B) Country Points - 10 cents per bushel above Schedule A.				
(2) Class II Export				
(A) United Kingdom				
1 Hard	155	155	155	
1 Northern	155	155	155	
2 Northern	152	152	152	
3 Northern	150	150	150	
(B) Commercial				
1 Hard	228/5	218/4	229	
1 Northern	228	218/4	229	
2 Northern	225/5	215/4	226	
3 Northern	223/5	213/4	224	
1 C. W. Amber Durum	238/5	228/4	239	
2 C. W. Amber Durum	235/5	225/4	236	
3 C. W. Amber Durum	233/5	223/4	234	

1/ Price - Basis in store Fort William-Port Arthur and Vancouver.

CANADA'S AGRICULTURAL PROGRAM FOR 1947

Canada's annual Agricultural Objectives Conference assembled at Ottawa early in December for the purpose of drafting recommendations for agricultural production in 1947. This Conference, the second since the close of World War II was faced with the problem of attempting to adjust domestic agricultural production to the requirements of the domestic and international markets which, in all likelihood, would be freed still more from the restrictions and maladjustments occasioned by wartime conditions. The international aspect of the problem was further complicated by the difficulty of estimating the extent of the recovery of agricultural production in the war-ravaged countries during the coming season.

The grains and forage crops report as presented to the Conference stated that "the need for cereals in Europe is not as pressing as it was in 1945-46 and next year's harvests should bring supplies within a reasonable measure of meeting requirements". At the same time, it was reported that there was a growing demand for live-stock products in the United Kingdom and continental Europe, as well as in Canada. In order to help supply these expanding markets, it was emphasized that Canada's live-stock population would have to be increased, and to do this additional feed grain supplies must be forthcoming from increased domestic coarse grain acreage and production. At this point the Conference was faced with the fact that if present price relationships between wheat and coarse grains were continued into the 1947 seeding season, the chances of effecting a switch from the growing of wheat to that of feed grains would be very remote. Therefore, it was proposed that an incentive in the form of an acreage bonus for the growing of barley in the Prairie Provinces be provided in an effort to stimulate the production of this valuable feed grain. While it was impossible for the Conference itself to provide any assurance that a barley acreage bonus would be paid in 1947, an announcement to this effect will be made at a later date in the event that the proposal meets with the approval of and is sanctioned by the proper authorities.

With a reduced wheat acreage and a larger coarse grain acreage being the keynote of the grain production proposals agreed to by the Conference, it was recommended that the wheat acreage be reduced from 25.9 million acres in 1946 to 24.0 million in 1947, a reduction of about 7 per cent. With average yields next year total production in 1947 would approximate 375 million bushels.

In view of probable feed grain requirements it was decided to recommend that the oat acreage be increased from 13.2 million in 1946 to 14.3 million acres in 1947. This represents a gain of 9 per cent. If this suggestion is carried out and average yields are obtained next season, a crop of about 425 million bushels may be realized, some 25 million bushels larger than the second official estimate of the 1946 oats production.

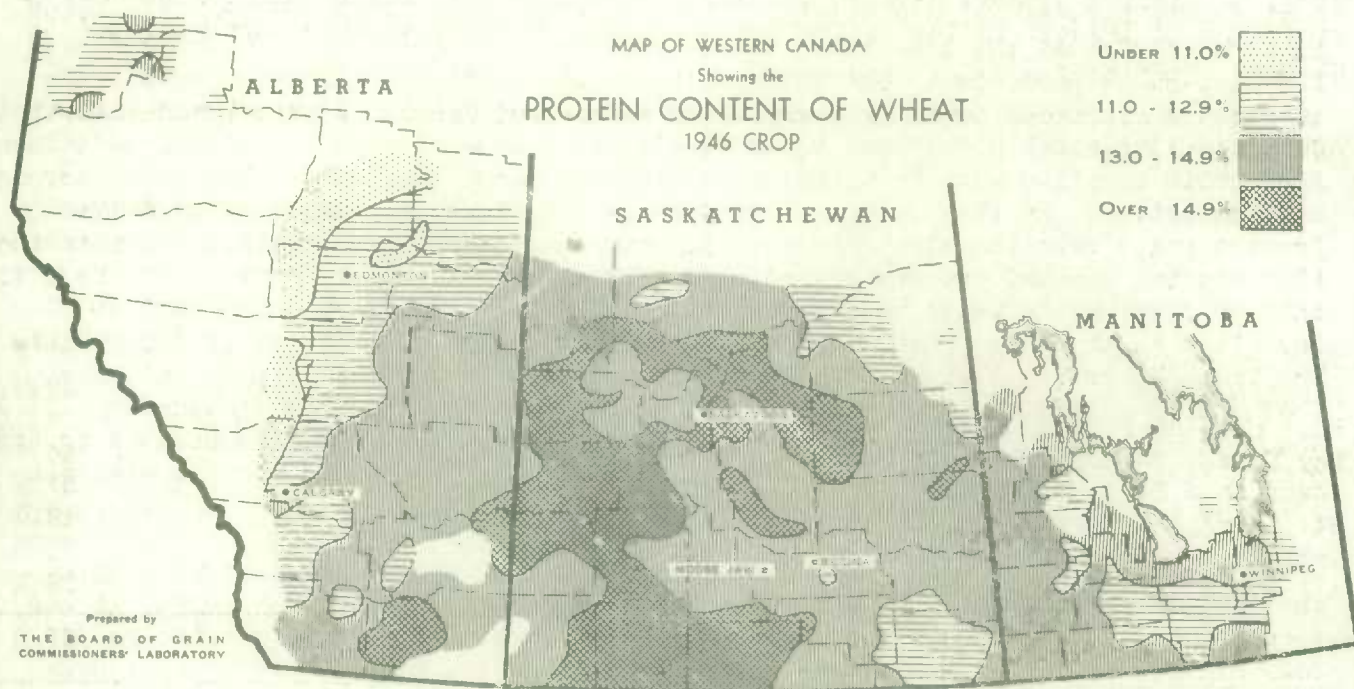
Present proposals for the expansion of barley acreage are strongly supported by the fact that barley has been in extremely short supply during the past several months. Prospects of small year-end stocks at July 31, 1947 and recommendations for increased hog production in 1947 led to the proposal that Canada increase the barley acreage from 6.7 million acres in 1946 to 8.0 million acres next year. In addition to the larger supplies required for domestic consumption, present prospects indicate a foreign market able to absorb substantially larger amounts of malting barley than are at present available.

In keeping with the accepted conservation methods and cultural practices necessary in the Prairie Provinces to ensure the maximum yields of the cereal grains, especially wheat, it was recommended that the area devoted to summer-fallow in 1947 be placed at 18.8 million acres, only one per cent below the 1946 level of 18.9 million acres.

Protein Content of Canada's 1946 Wheat Crop - Revised December 7, 1946 - The average protein content of the 1946 western wheat crop is 13.8 per cent according to the latest crop bulletin issued by the Laboratory of the Board of Grain Commissioners. This figure is exactly the same as that for the 1945 crop, and 0.2 per cent higher than the mean for the past twenty years.

Protein values examined by provinces show that there are differences in provincial figures between this year and last. Values for Manitoba and Saskatchewan are higher by 0.9 and 0.3 per cent and for Alberta lower by 0.7 per cent this year.

	<u>Western Canada</u>	<u>Manitoba</u>	<u>Saskatchewan</u>	<u>Alberta</u>
	p.c.	p.c.	p.c.	p.c.
1946	13.8	13.2	14.4	13.2
1945	13.8	12.3	14.1	13.9



The survey on which these data are based was made with 5,554 samples drawn from Western Canada in such a way that they represented the volume of wheat grown in each particular area. There were 724 samples from Manitoba, 2,916 from Saskatchewan, and 1,914 from Alberta.

The protein content and the number of samples for each grade are shown below. The number of samples reflect the relative volume of those particular grades.

1 Northern	-	917 samples	13.5 per cent
2 Northern	-	2,780 samples	13.8 per cent
3 Northern	-	1,027 samples	14.0 per cent
4 Northern	-	546 samples	13.9 per cent
4 Special	-	209 samples	15.4 per cent
Garnet grades	-	75 samples	11.4 per cent

Licensed Grain Storage Position - Licensed grain storage capacity in Canada at December 1, 1946 totalled 495 million bushels as compared with 567 million bushels a year earlier. With the exception of storage facilities at the Maritime Ports, some reduction in licensed capacity occurred in all positions. The greatest reductions took place in western country elevators and at the Lakehead where storage capacity declined by 19 million and 39 million bushels respectively.

Stocks of grain in store at December 12 occupied only 37.2 per cent of total storage capacity. Low storage stock levels at the end of the crop year and a substantial export program have resulted in generally ample grain storage space all across Canada.

In addition to the 184 million bushels in store in Canadian elevators, about 33 million bushels were in transit by lake and rail and 10 million bushels in store and in transit in the United States, making a total visible supply of 227 million bushels.

The licensed storage position in summarized form, was briefly as follows on December 1, 1946:

	<u>Storage Capacity</u>	<u>Grain in Store December 12, 1946</u>	<u>% Capacity Occupied</u>
	- million bushels -		
Western Country Elevators	269	110	40.9
Pacific Coast	17	10	58.8
Fort William-Port Arthur	88	17	19.3
Bay Ports, Goderich, Sarnia	34	22	64.7
Lower Lake Ports	19	11	57.9
St. Lawrence Ports	25	3	12.0
Maritime Ports	5	1	20.0
All Others	38	10	26.3
T o t a l	495	184	37.2

Ontario Winter Wheat - The amount of Ontario winter wheat milled during the first quarter of the current crop year was nearly 300,000 bushels less than that for the corresponding period in 1945-46 and the smallest amount milled for the period since 1943-44. So far, marketings of the 1946 winter wheat crop in Ontario have been far below those of a year ago. Ontario winter flour production for the first three months of 1946-47 totalled 246,636 barrels as against 307,796 barrels in the same period of 1945-46.

The monthly millings of Ontario winter wheat during the first quarter in the last three years are listed below in bushels:

	<u>1946</u>	<u>1945</u>	<u>1944</u>
August	439,392	450,623	392,947
September	345,449	470,540	368,862
October	287,963	442,040	431,697
T o t a l	1,072,804	1,363,203	1,193,506

Flour Milling Situation - During the first quarter of the current crop year, wheat flour production amounted to 6,819,250 barrels, more than half a million barrels above the total output for the same period in 1945. In the event that the present rate of production is maintained for the remainder of the crop year, the all-time record wheat-flour production of 26,435,341 barrels achieved in 1945-46 will be exceeded in 1946-47.

During the past season the Canadian flour milling industry operated at 96.5 per cent of its total capacity as compared with 91.2 per cent in 1944-45 and 90 per cent in 1943-44. Mills reporting operations for October 1946 had a total milling capacity of 92,270 barrels per 24-hour day, and on the basis of a 26-day working period in the month 101.4 per cent was effective. This situation obtains through the fact that some mills have exceeded their rated capacity by operating more than their customary number of working days during the month. A record rate of operation was established in March 1946, when production rose to 102.4 per cent of the rated capacity of mills operating in that month.

Exports of wheat flour (data based on Customs returns) totalling 13,786,171 barrels in 1945-46 were slightly below the 13,923,832 barrels exported during the 1944-45 crop year. During the first three months of the present season exports have been maintained at high levels, totalling 4,198,859 barrels as against 3,124,919 barrels for the same period in 1945.

In the following table the record of production and exports during the past nine years is shown, together with statistics for the first three months of the current crop year:

Production and Exports of Wheat Flour
(barrels of 196 pounds)

<u>Crop Year</u>	<u>Production</u>	<u>Exports</u>
1937-38	12,867,728	3,009,656
1938-39	15,197,297	4,604,245
1939-40	17,778,311	6,781,367
1940-41	19,575,833	10,288,827
1941-42	19,905,741	10,205,778
1942-43	23,590,516	12,575,215
1943-44	24,303,833	13,464,371
1944-45	24,634,905	13,923,832
1945-46	26,435,341	13,786,177
1946-47 August	2,158,627	1,977,008
September	2,227,748	1,236,125
October	2,432,875	985,726
Total - 3 months	6,819,250	4,198,859
Same Period 1945-46	6,293,879	3,124,919

UNITED STATES SITUATION

The December Crop Report - The outturn of wheat in the United States in 1946 is now estimated at 1,156 million bushels, 13 million bushels below the previous estimate. In its Annual Summary of acreage, yield and production of principal crops, the Crop Reporting Board of the Bureau of Agricultural Economics states:

"The 1946 record production of 1,156 million bushels of wheat was 4 per cent larger than the previous record of 1,108 million bushels in 1945. This is the third consecutive billion-bushel wheat crop, and the third consecutive record-breaking year. The only other year when production reached a billion bushel was 1915, which still holds the record for the largest spring wheat production. The 1946 record-breaking crop is attributed primarily to the increased acreage of winter wheat seeded; low winter losses, the remarkable recovery from the early season shortage of moisture in both the southern Great Plains winter wheat and the northern Plains spring wheat regions; and the outstandingly good season in the Pacific Northwest. The 67,201,000 acres of all wheat harvested is 3 per cent above the 65,120,000 acres harvested last year, and is the largest since 1938. The seeded acreage increased to 71,510,000 acres from the 69,130,000 acres seeded for the 1945 crop season.

"The 1946 winter wheat crop of 874 million bushels was 56 million bushels larger than the 818 million bushels produced in 1945 and 6 per cent larger than the previous record of 825 million bushels produced in 1931. The current year's record production climaxes three consecutive years with bumper winter-wheat crops, the largest ever produced except for 1931. The area of winter wheat harvested, at 48,510,000 acres, was exceeded only in 1919 and 1938. The 52,206,000 acres seeded in the fall of 1945 was exceeded only by seedings in the fall of 1936 and 1937. Winter wheat acreage was reduced from early intentions in the Southeast because of the delay in harvesting 1945 crops and wet fields at seeding time but an increased acreage was seeded under generally favorable soil moisture conditions in the Great Plains area and Western States. In the Pacific Northwest, particularly in Washington, the favorable soil moisture situation resulted in a marked shift from spring wheat to winter wheat."

The Board places the production of all spring wheat, including 36 million bushels of Durum wheat, at 282 million bushels. This is below last year's production of 290 million bushels and the smallest spring wheat crop since 1942. The 18,691,000 acres harvested this year was slightly above the 18,131,000 acres harvested last year. However, the 1946 crop season in the Northern Great Plains started off with a cumulative moisture deficiency and rather poor prospects for spring wheat. This situation was not relieved until rains fell in late June. Straw was very short as growth was largely determined during the period of early season dryness. Later rains aided the development of well-filled heads of medium size, but with plump, high quality grain. Yields in the Pacific Northwest were unusually high.

The New Winter Wheat Crop - On December 19 the Crop Reporting Board issued a release on the acreage, condition and production of the new winter wheat crop. The report estimates the acreage of winter wheat seeded for all purposes this fall at 56,426,000 acres, eight per cent above the 52 million acres seeded a year ago. This year's acreage is about the same as in 1938, which was second only to the record seedings for the 1937 crop, when Kansas reached its peak of 17 million acres.

To quote directly from the report:

"A 1947 winter wheat production of about 947 million bushels is forecast. This estimate is based upon December 1 reported condition of the crop, an appraisal of soil moisture conditions to date and other factors affecting yields per acre. If realized, this will exceed the record 1946 winter wheat crop by 73 million bushels or 8 per cent. The December 1 condition of 93 per cent is the highest since the 98 per cent reported in 1918 and is 11 points above the 82 per cent of last December. Favorable fall soil moisture conditions not only permitted timely seeding of wheat but resulted in generally satisfactory germination and fall growth. However, in States east of the Mississippi River rank plant growth, such as exists this fall is not necessarily associated with high yields the next year. Also in the Great Plains area the advanced plant development would require above normal spring and early summer precipitation to maintain the present high reported condition. In the present forecast of production normal weather has been assumed for the rest of the crop season.

"The indicated yield per seeded acre of 16.8 bushels compares with 16.7 bushels in 1946. The indicated acreage that will not be harvested for grain is 5.5 per cent of the planted acreage compared with 7.1 per cent not harvested in 1946. If realized abandonment will be the lowest since 1931 when the loss of planted acreage was 5.3 per cent."

As the Board states in its forecast, it has assumed normal weather will prevail for the rest of the season. Recent reports, however, indicate that much of the winter wheat crop is without snow cover and would, therefore, be unusually vulnerable should unfavourable weather conditions develop.

Grain Restriction Eased - On November 26 the Secretary of Agriculture reported to the President that: "1. The grain position is favorable both for domestic use and with regard to procurement and availability for export to hungry nations overseas. "2. The situation with regard to transportation and shipment is not at all favorable, with transportation apparently the limiting factor this year in our total shipments of grain for food use abroad."

With over-all grain supplies claimed relatively favourable the United States Department of Agriculture amended War Food Order No. 144 to remove all restrictions (effective December 1) on the production of flour for domestic distribution and for export to license-free countries. Millers, since last April, have been required to limit the production of flour for domestic distribution, at first to 75 per cent of the corresponding months of 1945, and later to 85 per cent of the average monthly production in 1945. The only restrictions now remaining on the use of wheat are that (1) wheat and wheat products cannot be used by distillers and brewers, and (2) milling wheat and flour suitable for human consumption cannot be used in the manufacture of mixed feed.

Box-Car Priority Order to Expedite Export Movement - To hasten movement of Commodity Credit Corporation grain to export position, the Interstate Commerce Commission issued an order covering transportation to and from terminal elevator points in Colorado, Kansas, Missouri, Nebraska, Oklahoma and Texas, effective December 9, prohibiting movement, diversion or reconsignment of wheat, corn, rye, oats, barley and flaxseed unless permits are granted by I.C.C. agents. The order is designed to assure the C.C.C. of from 300 to 350 cars a day to be loaded for Gulf ports, and depending upon the rate of flow^w the ports can handle and the number of cars delivered from eastern roads, additional cars will be allotted to commercial consignors holding I.C.C. permits.

Chicago Cash Wheat - Offerings of cash wheat on the Chicago market have been light throughout the month, while mill demand has remained generally strong and most transactions have been made at higher prices than those prevailing in November. Some weakness was felt early in the month but by December 18 the situation was such that No. 2 Red was sold at \$2.38, a 26-year high. It is anticipated that the spot market will remain strong until such time as receipts at terminals pick up considerably. Other sustaining factors during the month have been Government purchases of wheat and flour for export, the lowest final estimate of the 1946 wheat crop and the continued tight empty car situation.

The following are the daily cash prices by grades on the Chicago market:

November 28, 1946	.....	Thanksgiving Day	
29	.....	2 Red	227
30	.....	None	
December 2	.....	None	
3	.....	2 Red	220-222
4	.....	None	
5	.....	None	
6	.....	2 Red	230
7	.....	2 Red	229
9	.....	None	
10	.....	2 Red	229
11	.....	None	
12	.....	None	
13	.....	2 Hard	222
14	.....	None	
16	.....	None	
17	.....	None	
18	.....	2 Red	238
19	.....	None	
20	.....	None	

Chicago Wheat Futures -

The Chicago futures weakened somewhat in the the first week of the month, possibly as a result of a statement made by Secretary of Agriculture Anderson relative to the plentiful supplies of wheat available for all purposes in the country. The coal strike was also a factor. The market developed considerable strength during the second week of the month following upon settlement of the coal strike; further purchases by the Commodity Credit Corporation of wheat for export, and indications that the empty car situation would remain tight for some time to come. Prices eased again in the third week due, in part, to the expectation of a bearish government report on new winter wheat, but government purchases of flour for export and the lower final estimate of 1946 production served to slow up the decline.

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

	<u>January</u>	<u>March</u>	<u>May</u>	<u>July</u>
- cents and eighths per bushel -				
November 28		Thanksgiving Day		
29	209/2	203	192/1	175/4
30	204	197	187/4	171/6
December 2	203/7	196/6	188	173
3	203/6	197/7	188/6	174/1
4	203/6	196/6	187/7	174/6
5	206	199/2	190	175/3
6	206/6	199/4	190/5	176/2
7	209	200/6	192/3	178
9	209/4	202/2	193/4	179
10	209/4	201/2	192/6	178/4
11	213	204	194/3	179/4
12	214	206/2	196/4	181/4
13	212	204	194/6	180/4
14	214	206/4	196/7	181/7
16	214	205/6	195/6	179
17	212	203/4	193/1	177
18	212/4	202/6	192/2	176/4
19	212/5	202/6	193/1	177/2
20	211/4	202	191/4	175/4

ARGENTINE SITUATION

Crop Conditions - During the past few weeks, excessive rainfall in the grain growing zone has delayed harvesting and it is feared that some deterioration will occur in the wheat crop. While the over-all production is fairly well assured, it is felt that there will be a considerable lowering of grades. Trade circles are of the opinion that the damage caused by October frosts have been considerably over-estimated. With the exception of a few local areas in the north, the crop appears to have escaped serious locust damage. Although the heavy rains have materially benefited the corn and sunflower seed crops, a period of clear weather is needed to condition the wheat crop and promote harvesting.

First Estimate of 1946 Production - On December 10, the Argentine Government in its first estimate of production, placed the outturn of the 1946 wheat crop at 218.3 million bushels. This figure contrasts with recent trade estimates of around 238 million bushels and last year's final outturn of 143.5 million. At this time there is no indication of the size of the year-end carry-over, but it is not expected to be large. Present unofficial estimates suggest that domestic consumption during 1947 will account for approximately 120 million bushels. In addition, some 60 million bushels have already been set aside for shipment to Brazil and Spain. Relative to present world requirements, the exportable surplus remaining after the above commitments have been met appears to be small.

Government Control of Marketings - Effective December 16, the Argentine Government started the purchase of the new wheat and flaxseed crops. A decree issued through the Industry and Commerce Department specifies that the Institute for the Promotion of Interchange, which is to be in sole charge of all grain operations, will purchase Grade II wheat f.o.b. the ports, at the rate of 17 pesos per 100 kilograms (\$1.38 per bushel in terms of Canadian funds) for the first 300 tons (about 11,000 bushels) sold by each producer and 15 pesos per 100 kilos (\$1.22 per bushel) for any amounts in excess of that quantity.

Farmers in Argentina have never viewed with favour government intervention in the marketing of grain and this time is no exception. It is reported that the recent decree fixing wheat prices for the 1947 season has roused a storm of protest from the primary producers. This dissatisfaction with government price fixing is partially reflected in the 1946 wheat acreage. Although somewhat larger than that of a year ago, it is well below the average acreage sown during the five-year, 1935-39, period. In view of the substantial future wheat requirements anticipated at the time of the Argentine seeding season, it is felt that the failure to obtain an even larger acreage was due chiefly to farm prices set well below prevailing prices on the world market.

Labour Difficulties - Of more immediate concern are harvest labour troubles. Increased demands by this labour force, which are uniformly supported by the regional delegations of the Labour and Welfare Department, have compelled farmers to not only pay higher wages but to accept incompetent workmen. It is reported that many farmers plan to abandon their crops rather than harvest them at a loss. Another cause for anxiety is the present shortage of bags, which may cause some delay in the harvesting and marketing of grain.

Export Trade - Wheat export business has been at a standstill for some time and it appears that the trade is awaiting an announcement by the Government of the new crop selling price. Total exports during the period January 1 to December 13, 1946 have amounted to 49.5 million bushels as against 92.5 million bushels for the corresponding period a year ago.

AUSTRALIAN SITUATION

A cable concerning the wheat situation in Australia was received from the Canadian Government Trade Commissioner in Melbourne on December 16 and is quoted as follows:

"Australian wheat stocks at the end of November amounted to 20 million bushels. The new crop is estimated at 115 million bushels.

"There were no exports of wheat during November and exports of flour totalled 34,647 long tons, mostly to the Pacific Islands and Hong Kong.

"Twenty million bushels of wheat have been moved to New South Wales and Queensland to make up for the crop failure in those states.

"Flour mills at present are working two shifts in Victoria and New South Wales and three shifts in South Australia and West Australia."

An article concerning the Australian wheat export situation and appearing in the United States Department of Agriculture's publication 'Foreign Crops and Markets' stated in effect that Australia's exports of wheat and wheat flour equivalent totalled 37 million bushels during the crop year ended June 30, 1946 and are among the smallest on record. This figure compares with 59 million bushels shipped during the corresponding period a year earlier and the average of 37 million bushels for the five-year period ending June 30, 1945.

In view of the Combined Food Board's (now International Emergency Food Council's) efforts to relieve most effectively the world shortage of food-grains by conserving shipping space, most of Australia's shipments of wheat and flour during the year were directed to near-by deficit areas. India, Ceylon, Malaya, New Zealand and Hong Kong were the principal destinations, with Australia's usual shipments to the United Kingdom being supplied largely by Canada and the United States.

As a result of reduced harvest prospects this year, Australia was expected to export little wheat other than that to meet existing commitments for the remainder of the crop season, ending November 30. The outlook for exports was also in doubt due to a shortage of coal, especially in New South Wales. The shortage has restricted the flour output since August, with some mills reduced to two shifts a day, instead of three, as in previous months. The coal shortage was also hampering delivery of wheat to the mills.

Australia: Exports of Wheat and Flour by Country of Destination,
Year Ended June 30, 1946.

Destination	Wheat	Flour in terms of Wheat	Wheat including Flour
		- 1,000 bushels -	
United Kingdom	-	150	150
Aden	-	496	496
Borneo	-	421	421
Ceylon	659	6,981	7,640
Hong Kong	310	1,296	1,606
India	9,123	4,368	13,491
Malaya	-	5,407	5,407
Mauritius	-	1,055	1,055
New Zealand	944	743	1,687
Union of South Africa	286	-	286
Rhodesia	331	-	331
Pacific Islands	-	1,142	1,142
China	639	-	639
Egypt	-	7	7
Greece	-	359	359
Madagascar	-	91	91
Other Countries	502	1,310	1,812
T o t a l	12,794	23,826	36,620
Previous Year	33,397	25,104	58,501

Compiled from official and unofficial sources. Flour exports have been put into wheat equivalent, assuming an extraction rate of 72.6 per cent.

CALENDAR OF WHEAT EVENTS

- December 2 It is reported that the Australian wheat harvest is now under way but belated rains have slowed operations to some extent although these may effect some improvement in prospects in the late-sown sections.
- 3 In order to increase feed grain acreages and stimulate live-stock production, the Dominion-Provincial Agricultural Conference recommended that Canada's wheat acreage be cut from 25.9 million acres in 1946 to 24 million in 1947.
- 4 Wheat purchases by the United States Commodity Credit Corporation, November 27 to December 4 inclusive totalled 2,528,061 bushels, bringing the adjusted cumulated total since September 9 to 50,173,009 bushels.
- 6 Exports of Argentine wheat during the 49-week period commencing January 1, 1946 have totalled 49.5 million bushels as compared with 90.9 million bushels for the corresponding period a year ago. Of the 1946 total all but 14.2 million bushels were exported to the United Kingdom and the Continent.
- 7 Australia has established a price for new wheat December-January shipment at 219 5/8 cents per bushel, f.o.b. ports. This compares with 154 cents charged at this time last year and 195 5/8 cents for old wheat last month - Broomhall.
- 9 Exports of United States wheat and wheat flour equivalent during the five-month period July-November 1946 amounted to 115.2 million bushels.
- 10 The Argentine Government in its first estimate of production placed the outturn of the 1947 wheat acreage at 218.3 million bushels. This estimate compares with the 1946 production figure of 143.5 million bushels.
- 11 During the twelve-month period ending June 30, 1946 Australia's exports of wheat and wheat flour equivalent amounted to 37 million bushels, the smallest amount ever recorded.
- 12 Stocks of Canadian wheat in store or in transit in North America totalled 158.4 million bushels as compared with 197.4 million bushels at the same date a year ago. Farmers' marketings since August 1 have totalled 226.8 million bushels as against 164.4 million for the same period in 1945.
- 14 Shipments of Canadian wheat from the Lakehead for the 1946 season of navigation totalled 147 million bushels, the lowest movement since 1938. Lake shipments of all grains amounted to 239.6 million bushels, the lowest since 1942.
- 16 A cable from Australia revealed that wheat stocks in that country at November 30 totalled 20 million bushels. The new crop was estimated at 115 million bushels.
- 17 The final estimate of the 1946 wheat crop in the United States places the outturn at 1,156 million bushels as against the November 1 estimate of 1,169 million bushels and the 1945 crop of 1,182 million bushels.
- 19 The acreage of winter wheat seeded for all purposes in the United States this fall is estimated at 56.4 million acres, 8 per cent above the 52 million acres seeded a year ago. An estimate based upon December 1 reported conditions of the present winter wheat crop places the 1947 production at approximately 947 million bushels, as compared with a crop of 873.9 million bushels in 1946.

Recent instructions issued by the Canadian Wheat Board to the Canadian Grain Trade stated that "Effective immediately, no further sales of wheat, alcomeal or any other wheat product shall be made for distilling purposes unless such wheat or wheat product is unfit for human consumption, and then only if approved by the Canadian Wheat Board, and the price for same based on our current Class 2 export price for wheat".

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