

*Myrtle Daly*



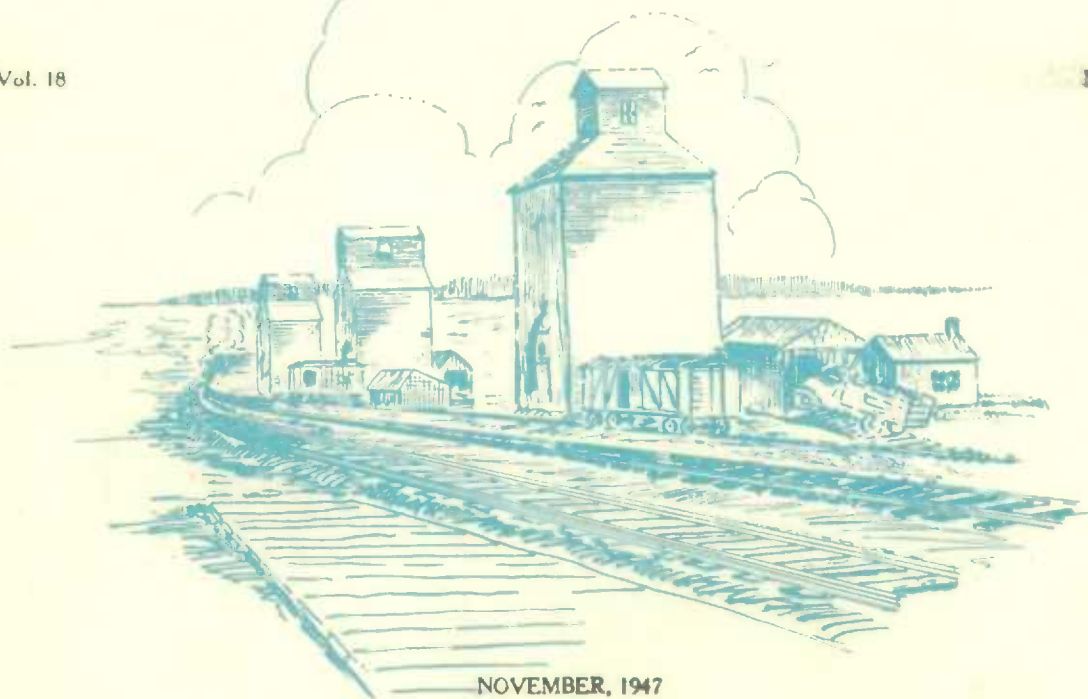
CANADA

DOMINION BUREAU OF STATISTICS  
AGRICULTURAL DIVISION

# MONTHLY REVIEW OF THE WHEAT SITUATION

Vol. 18

No. 4



NOVEMBER, 1947

Published by Authority of the Hon. James A. MacKinnon, M.P.  
Minister of Trade and Commerce  
Ottawa

Price \$1 a year



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The first of the great principles of the American Revolution was the right of the people to alter or to abolish their government. This principle was the foundation of the new system of government, and it was the first step towards the establishment of a new order of things. The second principle was the right of the people to be represented in their government. This principle was the foundation of the new system of government, and it was the first step towards the establishment of a new order of things. The third principle was the right of the people to be protected in their property. This principle was the foundation of the new system of government, and it was the first step towards the establishment of a new order of things. The fourth principle was the right of the people to be protected in their liberty. This principle was the foundation of the new system of government, and it was the first step towards the establishment of a new order of things. The fifth principle was the right of the people to be protected in their lives. This principle was the foundation of the new system of government, and it was the first step towards the establishment of a new order of things. The sixth principle was the right of the people to be protected in their families. This principle was the foundation of the new system of government, and it was the first step towards the establishment of a new order of things. The seventh principle was the right of the people to be protected in their religion. This principle was the foundation of the new system of government, and it was the first step towards the establishment of a new order of things. The eighth principle was the right of the people to be protected in their consciences. This principle was the foundation of the new system of government, and it was the first step towards the establishment of a new order of things. The ninth principle was the right of the people to be protected in their minds. This principle was the foundation of the new system of government, and it was the first step towards the establishment of a new order of things. The tenth principle was the right of the people to be protected in their souls. This principle was the foundation of the new system of government, and it was the first step towards the establishment of a new order of things.



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WORLD WHEAT SITUATION

World Production of Wheat and Rye - The 1947 world production\* of bread-grains is now indicated at 5.8 billion bushels of wheat and 1.5 billion of rye. The wheat crop, currently estimated to be about at the 1946 level, is four per cent less than the 1935-39 average. The record wheat crop in the United States and the anticipated record outturn of the Australian wheat crop now being harvested bring the world total for the year near average, despite much below-average crops in Europe and the Soviet Union. The 1947 rye crop is four per cent above 1946, but only 88 per cent of the 1935-39 average.

A reduction of about a third from the 1935-39 level in the European bread-grain crop places most of that continent in a serious food position again this year, since bread constitutes such a large part of the diet and alternative foods are also scarce. A reduction of such magnitude in bread grains means that import needs will be greater than during the past season when production, though low, was estimated to be about 25 per cent larger than the outturn this year. While a moderate increase in world grain exports is anticipated this year it will evidently be insufficient to offset the sharp decrease in indigenous production in many deficit areas. Bread rations have already suffered further reductions from their already low levels in a number of European countries.

FAO Reviews the Food Situation - Sir John Orr, the Director-General of the Food and Agriculture Organization of the United Nations recently reported a further deterioration in the world food position. He indicated that the gap between minimum needs and estimated supplies of bread grains has widened from a deficit of 9 million metric tons to one of ten millions since the FAO conference in Geneva last September. "There is no hope of other foodstuffs being substituted for bread," he said. "There is no prospect of a major increase in fat rations ... Forage crops also declined sharply and in consequence it will be difficult to maintain supplies of milk." Sir John also pointed out that the overall problem of shortage is complicated by the lack of purchasing power of deficit countries. He called for drastic action by governments to intensify their efforts to improve and stretch the food supply and stressed the need for further voluntary efforts such as the food saving campaign in the United States.

World Rice Shortage Increases Pressure on Wheat Supplies - Reliable estimates place the rice shortage at about four and one-half million tons. The Japanese occupation of the rice-exporting countries of south-east Asia seriously disrupted the rice trade and much of the shortage may be attributed to reduced production in these areas. Increases in the rice-eating population augment the

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\* According to a report prepared by the Office of Foreign Agricultural Relations, United States Department of Agriculture and released in November 24 issue of 'Foreign Crops and Markets'. The estimates include production in Russia and China.

critical nature of the situation. A committee of FAO which has been studying the world rice situation is not optimistic that any immediate improvement in supply can be expected. The Committee estimates that even by 1952 there may be a gap between supplies and requirements of about three million tons. India, China, Malaya and Ceylon were prewar importers of rice and until import supplies become adequate these countries will doubtless endeavour to substitute wheat for rice in their rations.

IEFC Recommends Transfer of Functions to FAO - The International Emergency Food Council by unanimous vote has recommended to its thirty-five member nations that they dissolve IEFC and authorize the transfer of its functions, organization and staff to a new International Emergency Food Committee of the Council of FAO. The action was taken by the IEFC upon assurances from the Council of FAO that it will maintain the present organization, staff personnel and procedures without change and provide adequate financing of the activities. To make the change effective the recommendation covering it must be ratified by a majority of the member governments of IEFC. The transfer, if approved, will likely occur on January 1.

IEFC has been the post-war counterpart of the Combined Food Board which was responsible in war-time for the allocation to allied countries of scarce foodstuffs and farm supplies. The new committee would presumably look after international allocations so long as the products concerned are in short supply.

#### THE CANADIAN SITUATION

Production and Exports - The third official estimate released on November 14 reduced Canada's wheat crop by about 3 per cent from the level indicated in the second estimate. Production of Canadian wheat in 1947 is now placed at 340.8 million bushels as against the earlier estimate of 352.2 millions. With the carry-over at July 31, 1947 placed at 84.5 million bushels, total Canadian wheat supplies for the 1947-48 crop year amount to 425.3 million bushels. With domestic requirements estimated at 150 million bushels, approximately 275 million bushels should be available for export and carry-over next July 31. Assuming a possible carry-over of from 75 to 85 million bushels Canada's exports for the current crop year will likely range from 190 to 200 million bushels.

Despite lower available supplies this year, exports of Canadian wheat and flour in terms of wheat for the first quarter of the current crop year amount to 48.5 million bushels, fractionally above the movement for the same period last year.

Deliveries from Farms and Visible Supplies - Farmers' marketings in the Prairie Provinces for the period August 1-November 20 amounted to 175.5 million bushels as compared with 211.3 million bushels for the same period last year. Commercial visible supplies at November 20 were 150.9 million bushels as against 159.6 millions at the same date in 1946. The distribution of these supplies is similar to that of last year with about 57 per cent located in country elevators, 12 per cent at the lakehead and 8 per cent at lake ports, some 10 per cent at or near seaboard or St. Lawrence ports with the remainder in various intermediate positions. Every effort will be made prior to the closing of navigation on the Great Lakes in December to build up the stocks in forward positions—as once lake and river navigation ceases all export wheat not already in position must be brought to seaboard via long rail hauls from the interior.



Tariff Changes - Under the terms of the proposed new trade agreement Canadian wheat entering the United States may enter on a 21 cent duty against the present duty of 42 cents per bushel. Flour has been reduced to 52 cents compared with \$1.04 per barrel.

Supply Position - The quantity of Canadian wheat available for export and carry-over for the present crop year amounts to 275.3 million bushels as against 326.3 million bushels for last year. The 1947-48 figure is based on the November (third) crop estimate of 340.8 million bushels. Domestic requirements have been tentatively placed at 150 million bushels this year as compared with 161 million bushels a year ago.

Exports of wheat and flour in terms of wheat up to November 1 amount to 48.5 million bushels, leaving 226.8 million bushels for export and carry-over.

#### Canadian Wheat Supplies

	<u>1947-48</u>	<u>1946-47</u>
	- million bushels -	
Carry-over in North America July 31 .....	84.5 <sup>1/</sup>	73.6
New Crop .....	340.8 <sup>1/</sup>	413.7
<b>Total Supply .....</b>	<b>425.3</b>	<b>487.3</b>
Estimated domestic requirements .....	150.0	161.0 <sup>2/</sup>
<b>Available for export or carry-over .....</b>	<b>275.3</b>	<b>326.3</b>
<b>Deduct:</b>		
Overseas Clearances of wheat as grain Aug. 1 - Oct. 31 ...	28.6	28.6
United States imports of Canadian wheat .....	3/	0.9
<b>Total Wheat Exports .....</b>	<b>28.6</b>	<b>29.5</b>
Exports of wheat flour in terms of wheat Aug. 1 - Oct. 31.	19.9	18.9
<b>Total exports wheat and wheat flour .....</b>	<b>48.5</b>	<b>48.4</b>
<b>Balance on November 1 for export or carry-over .....</b>	<b>226.8</b>	<b>277.9</b>

<sup>1/</sup> Subject to revision.

<sup>2/</sup> Revised estimate, basis preliminary disposition data.

<sup>3/</sup> U. S. imports August and September amount to 13,615 bushels only. October data not yet available.

Third Estimate of 1947 Wheat Crop - Canada's 1947 wheat production is now placed at 340.8 million bushels in the third estimate of production of field, forage and root crops released November 14 by the Dominion Bureau of Statistics. The new wheat estimate represents a reduction of about 3 per cent from the second estimate issued in September. The decline is due chiefly to highly unsatisfactory harvesting and threshing weather experienced in northern sections of Saskatchewan and much of Alberta subsequent to September 12, the date of the second estimate. Moreover, crop correspondents earlier in the season apparently underestimated the adverse effects on yields of the midsummer heat wave. Only after threshing was the full extent of the damage determined.

For the Prairie Provinces the wheat crop is now expected to yield 319 million bushels as compared with the revised estimate of 393 million bushels in 1946. The wheat crop in the Prairies contains a small proportion of fall wheat grown chiefly in Alberta which, for the purposes of this estimate, has been included under spring wheat. The estimated production of wheat in the remaining provinces of Canada is 21.8 million bushels, of which Ontario's outturn of 18.3 million represents the principal part. All but 563,000 bushels of the 1947 production in Ontario is fall wheat.

The third estimate of wheat production for all Canada and for the Prairie Provinces is summarized as follows:

	Area		Yield Per Acre		Production	
	1946	1947	1946 <sup>1/</sup>	1947	1946 <sup>1/</sup>	1947
	acres		bushels		bushels	
<u>Canada</u>						
Fall wheat	546,100	712,300	29.8	24.9	16,274,000	17,736,000
Spring wheat	23,530,000 <sup>2/</sup>	23,183,100	16.9	13.9	397,451,000	323,031,000
All wheat	24,076,100 <sup>2/</sup>	23,895,400	17.2	14.3	413,725,000	340,767,000
<u>Prairie Provinces</u>						
Wheat	23,354,000	22,992,000	16.8	13.9	393,000,000	319,000,000

<sup>1/</sup> Revised on basis of preliminary disposition data.

<sup>2/</sup> Revised on basis of preliminary census data for Prairie Provinces.

Within the Prairie Provinces, 1947 wheat production in Manitoba is placed at 43 million, Saskatchewan at 173 million, and Alberta at 103 million bushels, with yields averaging 17.2, 12.3 and 16.1 bushels per acre respectively.

Fall Wheat Sowings - The area sown to fall wheat (Ontario only) in the autumn of 1947 is placed at 908,000 acres, an increase of approximately 16 per cent over the area sown in 1946. The condition at October 31 was reported at 97 per cent of the long-time average yield per acre as compared with 101 per cent in 1946.



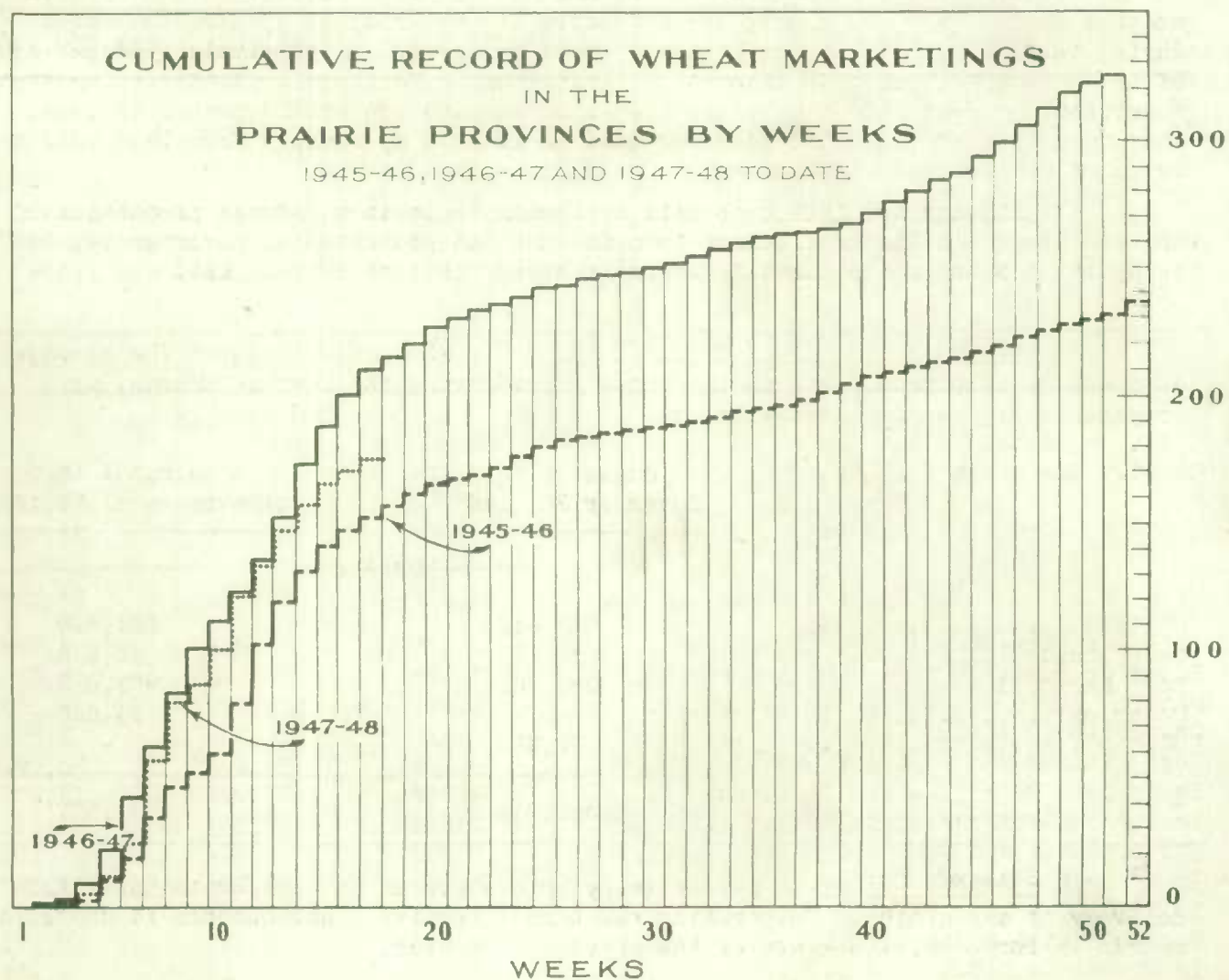
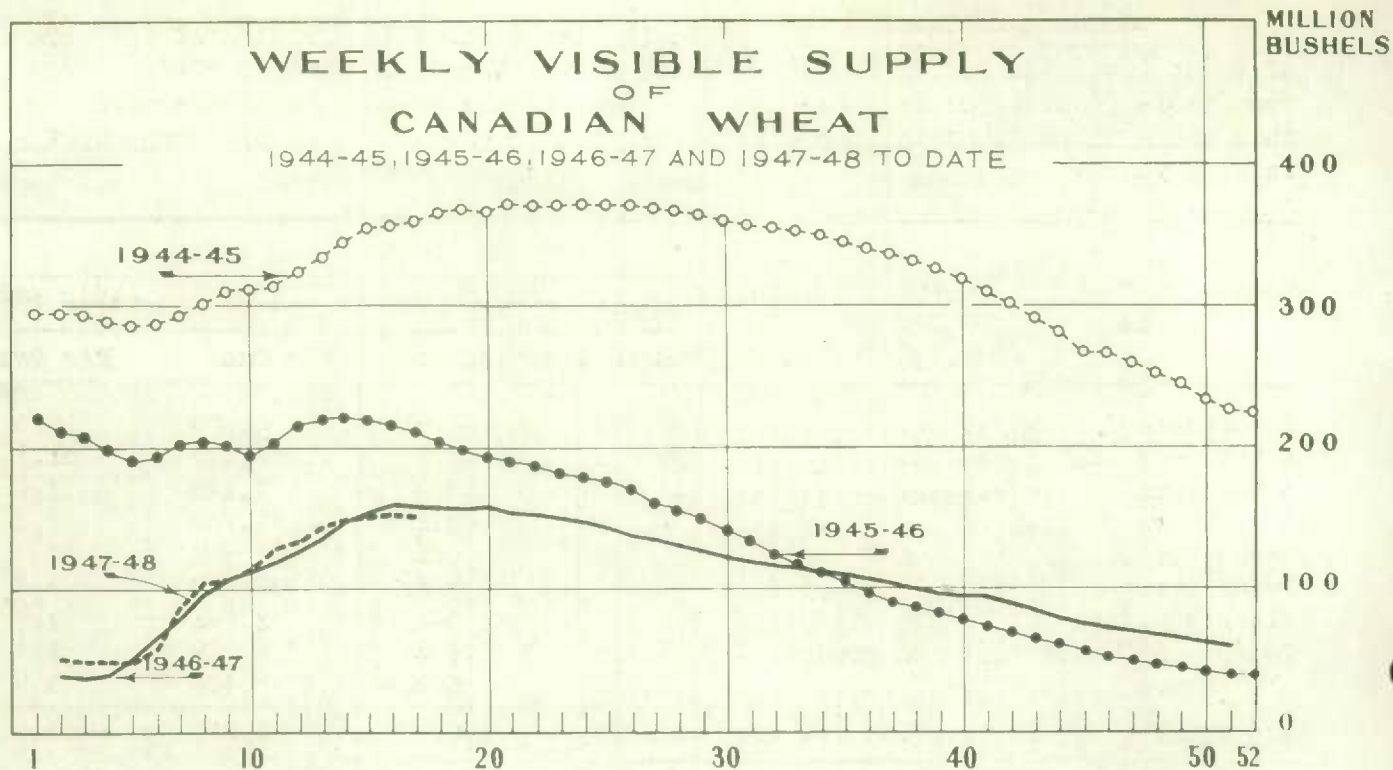
Farmers' Marketings - The following table shows primary receipts of wheat in the Prairie Provinces for the 1947-48 crop year along with comparative figures for 1946-47:

Week ending	Manitoba	Saskatchewan	Alberta	Total	Last Year
- bushels -					
August 1-7	32,021	141,687	555,182	728,890	1,419,443
14	73,314	761,176 <sup>1/</sup>	838,570	1,673,060 <sup>1/</sup>	2,364,945
21	244,141	2,096,729	1,477,364	3,818,234	5,312,878
28	2,014,085	2,689,001	978,155	5,681,241	14,581,052
September 4	5,148,064	5,631,203	2,528,671	13,307,938	19,643,656
11	7,292,497	18,710,446	6,955,198	32,958,141	19,650,323
18	2,854,735	14,201,062	5,881,846	22,937,643	21,871,880
25	1,188,968	4,460,164	1,130,219	6,779,351	16,312,603
October 2	1,402,524	9,751,555	2,446,758	13,600,837	10,793,147
9 <sup>1/</sup>	1,639,027	13,255,822	6,325,330	21,220,179	11,688,801
16 <sup>1/</sup>	1,043,657	6,809,636	4,146,024	11,999,317	12,350,319
23	753,541	5,674,298	6,865,689	13,293,528	17,722,686
30	628,279	4,294,423	4,852,038	9,774,740	20,104,410
November 6	313,817	3,562,227	4,106,957	7,983,001	14,967,353
13	282,002	2,320,280	2,450,689	5,052,971	12,484,468
20	466,193	2,367,964	1,848,343	4,682,500	9,960,782
T o t a l	25,376,865	96,727,673	53,387,033	175,491,571	211,228,746

<sup>1/</sup> Revised.

Wheat Visible Supply - The following table shows stocks of Canadian wheat in store and in transit in Canada and the United States on November 20, 1947, along with comparative figures for approximately the same date in 1946 and 1945:

	1947	1946	1945
- 000 bushels -			
Country Elevators - Manitoba .....	6,104	6,475	5,280
Saskatchewan .....	42,504	44,125	34,135
Alberta .....	37,997	37,280	35,895
T o t a l .....	86,605	87,880	75,310
Interior Private and Mill Elevators .....	3,479	3,517	4,954
Interior Public & Semi-Public Terminals ...	93	113	5,618
Pacific Ports .....	2,736	8,052	8,199
Churchill .....	110	43	1,878
Fort William and Port Arthur .....	18,648	22,393	20,000
In Transit Rail (Western Division) .....	7,615	8,098	14,201
Eastern Elevators - Lake Ports .....	11,849	12,347	22,649
St. Lawrence and Seaboard Ports .....	2,692	974	21,155
In Transit - Lake .....	5,056	7,394	11,538
In Transit - Rail (Eastern Division) .....	2,032	2,335	3,152
United States Ports .....	8,542	6,431	18,911
In Transit - U.S.A. ....	1,407	16	5,955
T o t a l .....	150,864	159,593	213,520



Grading of Wheat - The following table shows the grading of all cars of wheat inspected during the three-month period August to October 1947. Comparable figures for 1946 are also included in the table. It is observed that these inspections include a relatively small proportion of old-crop wheat in both years.

	Inspections -			
	August-October 1947		August-October 1946	
	Cars	Per Cent	Cars	Per Cent
1 Northern .....	3,871	7.6	10,055	16.3
2 Northern .....	19,311	37.9	31,813	51.7
3 Northern .....	11,924	23.4	7,144	11.6
4 Northern .....	2,070	4.1	1,732	2.8
Garnet .....	116	0.2	231	0.4
Amber Durum .....	2,823	5.5	2,050	3.3
Alberta Winter .....	443	0.8	1,041	1.7
Tough - All varieties and grades ..	7,498	14.8	5,099	8.3
All others .....	2,879	5.7	2,406	3.9
T o t a l .....	50,935	100.0	61,571	100.0

The effects of summer drought and unseasonable harvesting and threshing weather on the 1947 wheat crop are reflected in the gradings of cars inspected during the first three months of the current crop year. Approximately 69 per cent of the August-October 1947 inspections graded No. 3 Northern or better as against nearly 80 per cent placed in these grades during the comparable period of 1946. The proportion of toughs at 14.8 per cent in 1947 is up sharply from last year's level of 8.3 per cent.

Although the 1947 crop will apparently contain a reduced proportion of the top grades, it is of interest to note that the protein content of grades below No. 1 Northern is running generally higher this year than last.

Movement of Wheat to Maritime Ports - The table sets out the movement of wheat by RAIL from ports on the Great Lakes during the current season, with comparable figures for last year.

	August 1 to November 20, 1947	August 1 to November 21, 1946
	- bushels -	
Midland .....	267,616	881,318
Owen Sound .....	38,137	65,618
Port McNicoll .....	982,131	979,013
Goderich .....	-	94,628
Sarnia .....	73,328	-
T o t a l .....	1,361,212	2,020,577

Delivery Quotas - All delivery points are on an open quota basis for delivery of all grains. This ruling has been effective since October 14 and will remain in force until the end of the present crop year.



Shipments to the United States - Movement of wheat to the United States accelerated sharply during the four-week period ending November 20 this year, with over 9 million bushels moved into United States positions during that time. Shipments from August 1 to November 20 this year amounted to just under 10 million bushels as against 11.4 million for the comparable period of 1946. Rail movement during this period in both 1946 and 1947 was of minor importance, but for the comparable period in 1945 both vessel and rail shipments into the United States were on a much larger scale. Details of wheat shipments by destination in the United States are indicated in the table below:

Shipments August 1 - November 20

	<u>1947</u>	<u>1946</u>	<u>1945</u>
	bu.	bu.	bu.
<u>By Vessel</u>			
U.S.A. Pacific Ports .....	-	-	15,000
Buffalo .....	8,787,066	8,442,772	38,496,993
Erie .....	1,155,260	2,948,382	4,770,237
Total - Vessel Shipments .....	9,942,326	11,391,154	43,282,230
<u>By Rail</u>			
U.S.A. Seaboard Ports .....	-	4,337	3,634,338
Other U.S.A. Points .....	49,058	-	80,068
Total - Rail Shipments .....	49,058	4,337	3,714,456
GRAND TOTAL .....	9,991,384	11,395,491	46,996,686

Lake Shipments of Canadian Grain from the Opening of Navigation to November 21

	Wheat	Oats	Barley	Rye	Flaxseed	Total
	- bushels -					
1938	119,886,339	7,889,356	15,990,859	1,477,134	551,660	145,795,348
1939	162,347,936	15,835,742	16,058,455	3,775,008	382,497	198,399,638
1940	149,688,516	13,815,719	9,192,213	2,833,786	1,162,096	176,692,330
1941	197,838,766	8,268,211	9,877,059	5,601,571	1,496,620	223,082,227
1942	157,317,254	9,082,102	8,362,398	991,137	2,158,334	177,911,225
1943	202,711,108	37,079,059	39,511,543	1,778,154	6,532,030	287,611,894
1944	271,337,511	72,572,094	53,003,159	7,339,477	6,165,034	410,417,275
1945	314,319,291	80,381,430	42,568,312	4,306,523	3,598,096	445,173,652
1946	120,361,851	51,535,757	26,347,867	2,150,554	1,934,680	202,330,709
1947	141,377,929	40,659,855	25,014,215	7,720,844	2,496,298	217,269,141

The total shipments of Canadian grains through the Great Lakes from the opening of navigation until November 21 are about 15 million bushels heavier than last year but are considerably lower than in the three navigation seasons prior to 1946. The increase over last year is attributable to increased shipments of wheat, rye and flaxseed. Oats and barley shipments are smaller than in 1946, but rye has been moving in the largest quantities in many years.

Rail Movement from Fort William-Port Arthur - Nearly 40,000 bushels more wheat moved from the Lakehead by rail in October than during September. However, the 131,290 bushels moved is little better than half the amount shipped by rail during October last year. Rail movement will remain comparatively light through November, while lake shipping is still possible. With the closing of navigation in December rail shipping will become the only means of transporting grain eastward from the Lakehead and the usual seasonal increase concurrent with the closing of lake navigation may be anticipated.

The province of Quebec received more than twice the amount shipped to Ontario and nearly 65 per cent of the total wheat moving east by rail during October. Apart from very small quantities moved into Nova Scotia, Prince Edward Island and the United States, Ontario and Quebec absorbed all wheat moved east from the Lakehead by rail during October. No. 4 Northern continues to make up the major portion of these eastward rail shipments.

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

	1947-48	1946-47	1945-46	1944-45
	- bushels -			
August .....	90,573	187,825	23,255	91,891
September .....	91,366	175,773	57,533	169,603
October .....	131,290	255,754	73,776	86,571
November .....		256,249	99,197	97,512
December .....		1,601,883	2,280,636	1,236,339
January .....		2,462,002	4,533,707	1,936,038
February .....		1,816,087	1,127,764	764,629
March .....		1,711,013	2,223,266	1,091,909
April .....		566,006	1,015,730	196,042
May .....		361,386	536,462	66,154
June .....		241,475	920,233	58,642
July .....		123,145	130,276	52,726
Total - 12 months .....		9,758,598	13,021,835	5,848,056

The grades of wheat shipped during October 1947 and the provincial distribution of this rail movement are shown in the following table:-

	Ontario	Quebec	Nova Scotia	Prince Edward Island	U.S.A.
	- bushels -				
4 Northern .....	24,767	83,700	167	-	-
4 Special .....	2,000	-	-	-	-
Number 5 .....	1,000	1,000	-	1,000	-
Tough 4 Northern .....	3,000	-	-	-	-
Tough 4 Special .....	1,865	-	-	-	-
Tough No. 5 .....	167	-	-	-	-
1 C.W.A.D. ....	3,145	-	-	-	-
3 C.W.A.D. ....	3,000	-	-	-	-
Tf. Rej. 3 C.W.A.D. Mxd. Htd. .	-	2,037	-	-	-
Durum Tough Sample Heated .....	-	1,660	-	-	-
Tf. Sample Fireburnt .....	-	-	-	-	1,246
2 C.W. Soft White Spring .....	1,536	-	-	-	-
T o t a l .....	40,480	88,397	167	1,000	1,246
GRAND TOTAL.....	131,290				

Freight Assistance Shipments - The filing of late claims for August and increased claims during September have boosted the figure for total shipments under this plan to 3,601,165 bushels, over half a million bushels higher than for August-September of last year. The filing of late claims may further widen this difference.

In the first two months of the current crop year both Ontario and Quebec received larger quantities of freight assisted wheat than during the same two months in 1946. On the other hand, movement of wheat into the Maritimes and British Columbia under the freight assistance plan was considerably less for the two-month period in 1947 as compared with the similar period in 1946.

The provincial distribution of wheat shipments is shown in the following table, by months, with comparative figures for the crop year 1946-47:

1947-48	Ontario	Quebec	New Brunswick	Nova Scotia	Prince Edward Island	British Columbia	Total
- bushels -							
August ....	579,448	486,355	51,527	36,833	21,618	214,302	1,390,083
September .	1,315,775	639,472	48,305	57,925	15,400	134,205	2,211,082
T o t a l .	1,895,223	1,125,827	99,832	94,758	37,018	348,507	3,601,165
Same Period 1946-47	998,328	926,645	115,101	146,602	62,702	821,926	3,071,304

Millfeeds - Claims filed on millfeed shipments under the freight assistance policy indicate that shipments to all the provinces concerned have lagged behind last year's movement. It should be emphasized, however, that the filing of late claims will necessitate upward revision of the current data and may wipe out much of the apparent decline.

The provincial distribution of millfeeds under the Freight Assistance plan is shown in the following table. One column of figures covers the first two months of the present crop year and the other the corresponding period a year ago.

	August 1, 1947 to September 30, 1947	August 1, 1946 to September 30, 1946
- tons -		
Ontario .....	30,132	45,019
Quebec .....	38,804	54,527
New Brunswick .....	5,816	10,089
Nova Scotia .....	5,079	11,173
Prince Edward Island ....	1,236	2,971
British Columbia .....	6,376	12,645
T o t a l .....	87,443	136,324



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

Wheat and Wheat Flour

	Overseas Clearances of Canadian Wheat	U. S. Imports <sup>1/</sup> 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>1945-46</u>					
August .....	35,358	1,114	4,979	41,451	48,074
September ...	26,645	1,143	4,294	32,082	34,428
October .....	37,551	1,265	4,789	43,605	36,139
November .....	29,679	2,139	4,501	36,319	42,817
December .....	20,163	1,582	4,344	26,089	42,443
January .....	19,984	1,988	5,125	27,097	20,373
February .....	19,592	351	5,111	25,054	14,959
March .....	22,780	587	4,690	28,057	20,075
April .....	16,220	559	6,651	23,430	20,095
May .....	15,131	465	7,507	23,103	23,003
June .....	16,161	754	4,771	21,686	14,718
July .....	6,471	386	5,275	12,132	18,910
T o t a l ...	265,735	12,333	62,037	340,105	336,034
<u>1946-47 <sup>2/</sup></u>					
August .....	5,981	227	8,896	15,104	17,339
September ...	10,134	241	5,563	15,938	11,338
October .....	12,478	437	4,436	17,351 ✓	23,653
November .....	20,494	441	6,156	27,091	23,008
December .....	10,815	124	3,248	14,187	17,488
January .....	14,303	77	6,208	20,588	20,406
February .....	10,439	75	5,538	16,052	13,639
March .....	8,121	31	6,102	14,254	14,085
April .....	10,273	4	5,015	15,292	12,152
May .....	17,803	1	10,385	28,189	28,701
June .....	22,192	5	10,537	32,734	31,594
July .....	18,354	9	7,386	25,749	26,404
T o t a l ...	161,387	1,672	79,470	242,529	239,807
<u>1947-48 <sup>2/</sup></u>					
August .....	9,601	2	6,956	16,559	18,140
September ...	9,363	12	5,817	15,192	15,990
October .....	9,680	3/	7,123	16,803	17,249
T o t a l ...	28,644	14	19,896	48,554	51,379

<sup>1/</sup> U. S. A. official figures.

<sup>2/</sup> Subject to revision.

<sup>3/</sup> U. S. A. imports for September not available.

Overseas Clearances of Canadian Wheat and Wheat Flour (including U.S.A.

Imports) September 1947, and October, 1947.- The following statistics on monthly overseas clearances have been compiled by the Statistical Branch of the Board of Grain Commissioners:-

	September		October		August-October	
	Wheat Flour 2/	Wheat 1/	Wheat Flour 2/	Wheat 1/	Wheat Flour 2/	Wheat 1/
<u>BRITISH EMPIRE</u>	bushels		bushels		bushels	
United Kingdom	1,717,186	8,233,217	3,444,800	8,837,917	8,457,818	23,787,527
Eire	20,178	-	251,460	-	718,245	-
<u>Africa</u>						
Br. E. Africa	1,836	-	-	-	4,036	-
Br. S. Africa	-	-	-	-	1,818	-
<u>Br. W. Africa</u>						
Gold Coast	22,968	-	6,368	-	34,646	-
Nigeria	851	-	-	-	851	-
Sierra Leone	13,005	-	2,182	-	21,217	-
<u>Asia</u>						
Aden	-	-	-	-	450	-
Hong Kong	23,805	-	9,180	-	37,530	-
India	1,407,438	-	895,554	-	3,507,669	-
Palestine	-	-	9,162	187,852	9,162	187,852
<u>Europe</u>						
Gibraltar	-	-	-	350,000	-	-
Malta	-	197,867	-	-	-	749,467
<u>North America</u>						
Bahamas	19,120	-	14,562	-	47,407	-
Barbados	38,088	-	42,219	-	114,651	767
Jamaica	100,580	776	140,652	-	333,477	2,171
St. Vincent	-	-	-	-	-	10
Trinidad-Tobago	241,668	-	170,086	-	584,532	-
Other Br.W.Indies	32,463	-	54,792	-	115,101	-
Bermuda	11,399	-	7,366	-	24,588	-
Br. Honduras	1,809	-	5,279	-	15,566	-
Newfoundland	205,889	-	129,217	-	436,527	-
<u>South America</u>						
Br. Guiana	75,492	-	74,488	-	196,434	-
<b>TOTAL BR. EMPIRE</b>	<b>3,933,775</b>	<b>8,431,860</b>	<b>5,257,367</b>	<b>9,375,769</b>	<b>14,661,725</b>	<b>24,727,794</b>
<u>FOREIGN COUNTRIES</u>						
<u>Africa</u>						
Azores & Madeira	5,382	-	360	-	11,182	-
Belgian Congo	4,626	-	-	-	8,298	-
Egypt	39,024	327,620	-	304,500	57,384	1,034,920
Liberia	2,273	-	1,368	-	4,788	-
Portuguese Africa	11,475	-	1,148	-	12,623	-
<u>Asia</u>						
China	4,590	-	-	-	11,979	-
Iraq-Iran	-	-	-	-	-	339,000
Portuguese Asia	2,295	-	13,770	-	18,797	-
Philippine Is.	129,811	-	213,286	-	400,729	-
Syria	30,384	-	195,588	-	244,580	-
<u>Europe</u>						
Belgium	-	254,049	11,241	-	13,536	1,546,419
Denmark	-	-	-	-	5,346	-
France	193,662	-	156,897	-	602,703	-

Overseas Clearances of Canadian Wheat and Wheat Flour - concluded

	September		October		August-October	
	Wheat Flour <u>2/</u>	Wheat 1/	Wheat Flour <u>2/</u>	Wheat 1/	Wheat Flour <u>2/</u>	Wheat 1/
	bushels		bushels		bushels	
<u>FOREIGN COUNTRIES</u>						
<u>Europe (continued)</u>						
Germany	-	-	83,561	-	86,450	-
Greece	-	-	-	-	2,250	-
Italy	694,503	-	605,206	-	1,628,663	-
Netherlands	9,481	349,067	9,720	-	29,947	995,467
Norway	233,721	-	186,327	-	658,138	-
Poland	-	-	-	-	-	-
Portugal	22,905	-	7,898	-	30,803	-
Switzerland	13,316	-	9,369	-	52,335	-
<u>North America</u>						
Costa Rica	10,327	-	11,709	-	46,485	-
Cuba	36,036	-	1,724	-	199,269	-
Dominican Repub.	32,598	-	-	-	57,146	-
French W. Indies	1,836	-	47,754	-	67,387	-
Guatemala	2,525	-	4,603	-	12,636	-
Haiti	21,501	-	6,278	-	29,498	-
Honduras	688	-	1,607	-	6,885	-
Iceland	10,125	-	-	-	10,125	-
Nether.W.Indies	12,739	-	13,806	-	61,848	-
Nicaragua	2,304	-	-	-	4,140	-
Panama	15,754	-	571	-	40,468	-
Salvador	-	-	-	-	2,983	-
St.Pierre-Miquelon	112	-	1,935	-	3,195	-
<u>United States</u>						
For grinding in bond -	-	9,566	-	<u>3/</u>	-	10,731
For human consumption 68	68	50	261	<u>3/</u>	338	50
Unfit for	-	-	-	-	-	-
human consumption -	-	1,889	-	<u>3/</u>	-	2,834
Alaska	508	-	-	-	508	-
Virgin Islands	2,003	-	1,822	-	5,661	-
<u>South America</u>						
Brazil	139,685	-	177,025	-	346,203	-
Colombia	16,956	-	58,752	-	93,694	-
Ecuador	8,271	-	2,065	-	10,566	-
Nether. Guiana	6,471	-	6,381	-	32,278	-
Peru	-	-	-	-	5,742	-
Venezuela	165,096	-	33,678	-	316,620	-
TOTAL FOREIGN COUNTRIES	1,883,051	942,241	1,865,710	304,500	5,234,206	3,929,421
<u>GRAND TOTAL</u>						
EXPORTED	5,816,826	9,374,101 <sup>4/</sup>	7,123,077	9,680,269	19,895,931	28,657,215

1/ Subject to revision.

2/ Canadian Customs Returns - Conversion rate - 4 1/2 wheat bushels = 1 barrel.

3/ U.S.A. Imports for October not available.

4/ Revised.



Current Wheat Prices - The table below sets out the weekly averages of both domestic and export prices of western Canadian wheat for the weeks ending October 25 through November 22. The prices for domestic users and for export to the United Kingdom have remained unchanged during the period covered. The price of "commercial" wheat for export to countries other than the United Kingdom showed some fluctuation during the weeks under review, falling off from a high of 339 for No. 1 Northern on October 23 to an average of 322/5 for the same grade for the week ending November 1. The price sagged slightly the following week but rallied again the next week and closed the period on November 22 with a weekly average of 331/4. The prices quoted for domestic use and for sale to the United Kingdom include carrying charges of 3 1/2 cents per bushel.

Average Prices for the weeks ending <u>1/</u>					
	Oct. 25	Nov. 1	Nov. 8	Nov. 15	Nov. 22
<u>WHEAT</u> <u>2/</u>	- cents and eighths per bushel -				
(1) Class I Domestic					
(A) Domestic Use					
1 Hard .....	158/4	158/4	158/4	158/4	158/4
1 Northern .....	158/4	158/4	158/4	158/4	158/4
2 Northern .....	155/4	155/4	155/4	155/4	155/4
3 Northern .....	153/4	153/4	153/4	153/4	153/4
4 Northern .....	149/7	150/4	150/4	150/4	150/4
Number 5 .....	145/4	145/4	145/4	145/4	145/5
Number 6 .....	141/4	141/4	141/4	141/4	141/4
Feed .....	139/4	139/4	139/4	139/4	139/4
1 C. W. Garnet .....	153/4	153/4	153/4	153/4	153/4
2 C. W. Garnet .....	151/4	151/4	151/4	151/4	151/4
3 C. W. Garnet .....	149/4	149/4	149/4	149/4	149/4
1 Alberta Red Winter .....	158/4	158/4	158/4	158/4	158/4
2 Alberta Winter .....	157/4	157/4	157/4	157/4	157/4
3 Alberta Winter .....	154/4	154/4	154/4	154/4	154/4
1 C. W. Amber Durum .....	158/4	158/4	158/4	158/4	158/4
2 C. W. Amber Durum .....	155/4	155/4	155/4	155/4	155/4
3 C. W. Amber Durum .....	153/4	153/4	153/4	153/4	153/4
(B) Initial Price to Producers - 23 1/2 cents under Schedule A.					
(2) Class II Export					
(A) United Kingdom					
1 Hard .....	158/4	158/4	158/4	158/4	158/4
1 Northern .....	158/4	158/4	158/4	158/4	158/4
2 Northern .....	155/4	155/4	155/4	155/4	155/4
3 Northern .....	153/4	153/4	153/4	153/4	153/4
(B) Commercial					
1 Hard .....	333/1	322/5	322/1	328/5	331/4
1 Northern .....	333/1	322/5	322/1	328/5	331/4
2 Northern .....	330/1	319/5	319/1	325/5	328/4
3 Northern .....	328/1	317/5	317/1	323/5	326/4
1 C. W. Amber Durum .....	333/1	322/5	322/1	328/5	331/4
2 C. W. Amber Durum .....	330/1	319/5	319/1	325/5	328/4
3 C. W. Amber Durum .....	328/1	317/5	317/1	323/5	326/4

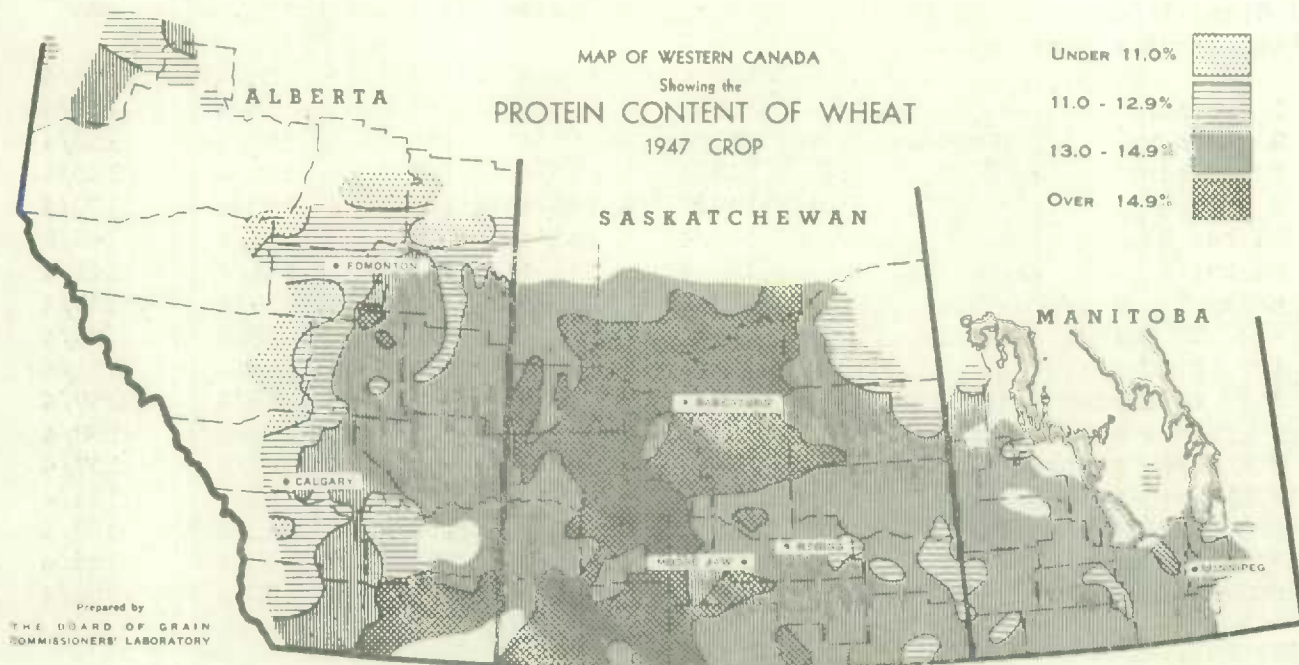
1/Source: Statistics Branch, Board of Grain Commissioners, Fort William.

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

Protein Content of Western Canada's 1947 Hard Red Spring Wheat Crop - The average protein content of the 1947 western hard red spring wheat crop is 14.1 per cent according to a report received under date of November 24 from the Grain Research Laboratory of the Board of Grain Commissioners. This figure is 0.3 per cent higher than the figure for last year's survey, and 0.5 per cent higher than the mean for the past twenty years.

An examination of protein values by provinces indicates that the average protein content in each of the three Prairie Provinces exceeds last year's levels. Protein values for both Manitoba and Saskatchewan are higher by 0.3 per cent, while the Alberta value is up 0.1 per cent from the protein value of the 1946 crop. Protein values by provinces are as follows:

	<u>Prairie Provinces</u>	<u>Manitoba</u>	<u>Saskatchewan</u>	<u>Alberta</u>
	p.c.	p.c.	p.c.	p.c.
1947 .....	14.1	13.5	14.7	13.3
1946 .....	13.8	13.2	14.4	13.2



The survey on which these data are based was made with 5,535 samples drawn from 1,408 shipping points in the Prairie Provinces. The samples were collected in such a manner as to be representative of the volume of wheat grown in each particular area. There were 756 samples from 222 stations in Manitoba; 3,152 samples from 781 stations in Saskatchewan, and 1,627 samples from 405 stations in Alberta.

The protein content and the number of samples for each grade are shown below:

<u>Grade</u>	<u>No. of Samples</u>	<u>Protein Content</u>
		%
1 Northern .....	555	13.5
2 Northern .....	2,572	13.9
3 Northern .....	1,548	14.2
4 Northern .....	483	14.2
4 Special .....	281	16.7
Garnet Grades .....	96	11.7



Flour Milling Situation - During October of the present crop year wheat flour production amounted to 2,531,104 barrels with 1,582,906 barrels of this amount being exported. To date this year, production has exceeded that for the same period last year. The smaller 1947 wheat crop, however, may be expected to make itself felt later in the crop year and it is not anticipated that total flour production for the current crop year will come up to the record established in 1946-47.

More than half of Canada's flour output continues to flow into export channels, with the United Kingdom, India and Italy in that order taking the largest quantities during the August-October period this year. Many other countries took smaller quantities during these three months.

Mills reporting operation for October had a total rated milling capacity of 97,780 barrels per 24-hour day and on the basis of a 26-day working period in the month 99.6 per cent of the rate capacity was effective.

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

<sup>1/</sup>  
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	3,609,656
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	10,205,772
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 .....	28,518,602	17,660,109
1947-48 August .....	2,412,394	1,545,784
September .....	2,481,189	1,292,628
October .....	2,531,104	1,582,906
<b>T o t a l - 3 Months</b> .....	<b>7,424,687</b>	<b>4,421,318</b>
Same Period 1946-47 .....	6,819,250	4,198,859

1/ Based on Customs returns.



## UNITED STATES SITUATION

Prospects for 1948 Wheat Crop - Taking into consideration the current level of wheat prices it is anticipated that American farmers will endeavour to seed at least as many acres to wheat for harvest in 1948 as in 1947. The official goal on July 31 last amounted to 75 million acres, about the acreage seeded for the 1947 crop excluding volunteer acreage which was harvested. Late reports indicate, however, that seeding has been hampered by drought in some important wheat-growing areas and by excessive rainfall in others. The Weekly Weather and Crop Bulletin issued by the Weather Bureau and covering the week ending November 18 states that:

"Rains during the week over practically the entire country, especially in the critically dry southwestern Winter Wheat Belt, improved prospects. However, soil moisture continues deficient principally in the western two-thirds of Kansas, southeastern and south-central Nebraska, southeastern Colorado, and some adjacent areas, with a good general rain still needed over the central and southern portions of the western Plains to sustain growth. On the other hand continued rains and wet fields caused further delay of seeding in the south, notably in the Carolina-Georgia area, and some sowing will have to be delayed until spring in Washington.

Soil moisture is now generally ample for germination of fall grains and the completion of seeding in the drought area of northwestern Texas and western Oklahoma, where general rains had not occurred during the past 4 months. About eight-tenths of the wheat has been seeded in this area, but more moisture is needed for the subsoil and to sustain growth.

Improved topsoil moisture conditions over most of Kansas resulted in increased seeding in southern and southwestern sections, but beneficial results in the dry western part will be only temporary unless substantial rains occur. Wheat continued favorable growth in eastern Kansas, eastern Oklahoma, and north-eastern Texas, where it is providing some pasturage. In Nebraska condition is very good to excellent in west, ranging to fairly good in east-central.

Winter wheat is in mostly very good condition in the upper Mississippi Valley, the Lake region, and Pacific Northwest and mostly good in the Rocky Mountain area and the East. Early sown in the South is satisfactory."

Disposition of 1947 Wheat Supplies - Recent reports indicate that exports of wheat and wheat flour may reach the 500 million bushel level this crop year. Domestic distribution is placed at 835 millions (food 500, feed 250, seed 85, industrial 0). This breakdown of the crop would leave a carry-over of about 155 million bushels, a fairly modest increase from last year's figure of 83 million bushels. The latest (November) estimate of the 1947 wheat crop is 1,406,761,000 **bushels**.

The high prevailing price for wheat has evidently discouraged feeding of this grain to livestock, as the amount estimated for live-stock feed is sharply reduced from earlier estimates. Conservation measures such as the voluntary shut-down of distilleries, and the rigid culling of non-productive live stock and poultry have also had a direct effect on the amount of grain disappearance into domestic channels. Substantial quantities of grain are moving overseas with January allocation of wheat and flour in terms of wheat set at just 35 million bushels.

Chicago and Minneapolis Cash Wheat - The spot market in Chicago has been relatively inactive with much of the wheat arriving at Chicago being applied on previous commitments. Demand for cash wheat at Chicago, however, was sufficient to maintain a 2 1/2 cents to 5 cents premium over the December future.

At Minneapolis the cash article was in quite good demand during the period, with both private and government agencies active in the market. Movement of wheat to spring wheat terminals slackened during the week ending November 21, with only 1,319 cars received at Minneapolis and 1,842 at Duluth. Prices were quite firm throughout the period under review with substantial advances being recorded following a mild slump early in the month. At November 20, wheats with higher protein content were bringing substantial premiums varying from 3 cents to 50 cents per bushel over ordinary wheats at Minneapolis.

The following are the daily cash prices by grades on the Chicago and Minneapolis markets.

1947	Chicago -		Minneapolis -	
	Grade	Price	Grade	Price
October 28	not available		not available	
29	2 Red	302	No. 1 Heavy Dark Nor.	298 1/8 - 302 5/8
30	2 Hard	293 1/4	No. 1 Heavy Dark Nor.	298 1/4 - 302 3/4
31	3 Red	296	No. 1 Heavy Dark Nor.	302 1/2 - 306
November 1	S. G. Red	271	No. 1 Heavy Dark Nor.	301 - 305 1/2
3	5 Hard	292 1/2	No. 1 Heavy Dark Nor.	291 1/2 - 296
4	2 Red	296	No. 1 Heavy Dark Nor.	290 1/2 - 295
5	2 Mixed	298	No. 1 Heavy Dark Nor.	294 3/4 - 299 1/4
6	2 Red	300	No. 1 Heavy Dark Nor.	293 - 299
7	2 Red	301	No. 1 Heavy Dark Nor.	299 1/4 - 301 3/4
8	None		No. 1 Heavy Dark Nor.	296 3/4 - 302 1/4
10	3 Red	302	No. 1 Heavy Dark Nor.	296 1/2 - 302
11	Remembrance		Day	
12	not available		not available	
13	None		No. 1 Heavy Dark Nor.	306 1/4 - 310 3/4
14	None		No. 1 Heavy Dark Nor.	303 - 307 7/8
15	None		No. 1 Heavy Dark Nor.	302 1/2 - 307
17	2 Red	305 1/2	No. 1 Heavy Dark Nor.	305 1/2 - 310
18	None		No. 1 Heavy Dark Nor.	308 1/2 - 313
19	None		No. 1 Heavy Dark Nor.	307 7/8 - 312 3/8
20	1 Hard	306	No. 1 Heavy Dark Nor.	307 1/2 - 312
21	None		No. 1 Heavy Dark Nor.	312 1/4 - 316 3/4
22	not available		not available	
24	2 Red	315 1/2	No. 1 Heavy Dark Nor.	311 7/8 - 315 7/8



Chicago Wheat Futures - Following a few days' weakness early in the period under review the market developed a generally firm tone with futures at one time during the last week of the period selling within 5 1/2 cents of the previous highs of the season. Some fairly wide fluctuations occurred during the month with prices being influenced rather easily by rumours of the possible government control program and by weather conditions in the main wheat growing areas of the country. The market was bolstered by the announcement of January export allocations in excess of December levels and by rather slow producer marketings—these latter being hampered in wide areas by box-car shortages and lack of space in local elevators.

The volume of trading in grain futures has been reduced materially since the imposition of the higher margin requirements which became effective on October 7.

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

<u>1947</u>	<u>December</u>	<u>March</u>	<u>May</u>	<u>July</u>	<u>September</u>
- cents and eighths per bushel -					
October 28	300/2	294/2	288/4	253/7	248
29	290/4	286/2	278/2	243/6	238
30	289/6	284/2	276/4	241/2	235/2
31	294/6	283/6	282/4	248	242/2
November 1	295/4	289/4	283/2	249	242/4
3	288/2	284	276/4	244	238
4	291	285/4	279/6	245/4	239/2
5	294	288/6	282	247	240/6
6	293/4	287	280/4	245/4	238/4
7	296/4	290/4	284	249/6	243/2
8	297/4	290/4	284/4	251/2	245
10	296/4	290	283/2	250/4	243/6
11		Remembrance		Day	
12	299/4	293	287/6	252/6	246/6
13	302/6	295/4	289/6	255	248/3
14	300	293	287/2	251/2	243/6
15	300/2	293/2	287/4	252	244/6
17	303	294	293	257	249
18	303/4	295/6	291/2	255/4	248
19	302/2	295	291/2	257	250
20	303/4	295/6	292	258	251
21	305/2	299/6	294/2	260/4	253/4
22	307	301/6	295/6	262	255/2
24	314	308	299/6	267	261



## THE ARGENTINE SITUATION

Argentina may join FAO - According to press reports, it is expected that the Argentine may join the United Nations Food and Agriculture Organization by January 1, 1948. This, if true, would mean that the Argentine would be expected to accept allocation of her surplus grain supplies by the International Emergency Food Council if this latter organization is incorporated, more or less intact into FAO. The price the Argentine is asking for export wheat would, under such a plan, be lowered somewhat to bring it more in line with prices prevailing in the other large exporting countries.

The Argentine, according to U.S. Ambassador James Bruce, needs equipment to move grain to ports and, if the United States will make this equipment available, will agree to sell new crop wheat at world prices. It is estimated that requirements in this respect approximate \$500,000,000. Trucks, at present moving the harvest, are getting gasoline priorities according to Broomhall.

Tentative Estimate of Wheat Crop - Using private sources and official estimates of acreage (13,645,000 acres) Broomhall calculates the Argentine crop of wheat at 184,000,000 bushels. Early harvestings in some areas have yielded 14 bushels per acre. Last year's crop amounted to 206 million bushels.

Condition of the Crop - Rain has fallen in some of the areas where it was most needed but it is feared that drought conditions earlier in the year stunted growth to such an extent that much of the seeded acreage will not be harvested.

Argentine Commercial Agreement with Italy - In a commercial treaty which was signed in Buenos Aires on October 13, Argentina promises to sell to Italy, during 1947, 400,000 metric tons (14.7 million bushels) of wheat and equal quantities in succeeding years until 1951 provided that the aggregate exportable surplus does not become lower than 2,600,000 metric tons (95.5 million bushels)

## AUSTRALIAN SITUATION

A cable received November 17 from the Canadian Trade Commissioner at Melbourne, Australia is quoted here:

"Australian wheat stocks at November first totalled 19 3/4 million bushels. Exports of wheat during October totalled 62,070 tons to India and New Zealand and flour 87,923 tons to Malaya, Burma, Ceylon, Middle East, and Pacific Islands. Shipments from Australia from December 1 to November 15 totalled wheat 11,678,000 bushels and flour 623,000 long tons. A record wheat harvest is expected and latest forecast is 250 million bushels despite report of some rust and grasshopper damage in New South Wales and Victoria. Harvesting is under way in northern wheat areas."

An extract from the Agricultural Newsletter issued by the Office of the Australian High Commissioner, November 5, 1947, states in part:

"In all States of Australia except West Australia, wheat yield records look like being shattered this year.

"Estimates for the total wheat yield range up to 230 million bushels<sup>1/</sup> .....Cereal experts say this is the best season for more than 50 years. Wheat growers and others are beginning to wonder what they are going to do about it. Labour shortages, threatened shortages of cornsacks and bulk storage facilities are factors making the prospective wheat harvest one big national headache.

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<sup>1/</sup> Editor's Note: Previous record years were 1939 with 210.5 million bushels and 1932 with 213.9 million bushels.

"Some people estimate that the New South Wales crop will reach 100,000,000 bushels. The State Government is beginning to build bulk-heads of 100,000 bushels capacity each at suitable railheads. In some districts harvest hands are said to be asking £3 (\$9.60) a day. Blackmarketeers are said to be asking £2 (\$6.40) a dozen for wheat sacks, fixed prices of which are (new) 28/- (\$4.48) and (second-hand) 23/6 a dozen.

"The Commonwealth Employment Service is making an urgent appeal for harvest labour. Many university students are expected to assist in their Christmas vacation.

"Australia may have for export 170 million bushels--the largest surplus known."

The Wheat Board of Australia announced on October 13 that they had made full preparations for handling Australia's anticipated large wheat deliveries. New bags for handling the wheat had been delayed by unsettled conditions in India from where the Australians are supplied with most of their requirements in this respect. It was hoped, however, that sufficient quantities would be forthcoming. It is the intention of the Board to ration deliveries of cornsacks to wheat and barley growers from the outset. Growers in non-silo areas will receive four bags per acre, while those in areas where silo storage is available will be allowed only one bag per acre. Additional quantities will be made available as sacks are landed from overseas.

Australian-United Kingdom Agreement - The Food Minister for the United Kingdom, Mr. Strachey, speaking on this agreement said that a good part of 75,000,000 bushels of Australian wheat that Britain will buy out of this year's crop will go to Malaya, Ceylon and other areas where Britain has responsibilities. More than half, however, would go to Britain.

The offer of wheat was subject to agreement on price 1/.

Long-term contracts already exist between Australia and the United Kingdom for a variety of products of Australian Agriculture and representatives of the two Governments, while agreed on general principles for a wheat agreement still have details of the plan to work out. The term of the contract has not been decided but five to ten years is generally considered agreeable to both parties.

The wheat from this crop or that delivered under a long-term contract, if concluded, would not affect the Canadian agreement under which Britain needs every ton.

Payment to Growers from Stabilisation Fund Anticipated - A statement was made by the Minister for Commerce and Agriculture, Mr. Pollard, on October 9 relative to the Stabilisation Fund. He said:

"A distribution of £5,000,000 (\$16,120,000) may be possible from 1945-46 stabilisation fund if high wheat prices continue, and a good harvest is obtained. This tentative proposal will be placed before a further conference of the States for consideration."

The suggestion was in line with the original proposals to keep the Stabilisation Fund within reasonable limits, and to refund any excess to growers. Mr. Pollard said that there was £7 million from the 1945-46 crop in the Fund at present, with another £4 million to come from the 1946-47 crop, making £11 million assured. It was suggested that an upper limit of £15 million be maintained for the fund. There would probably be £20 million or more in total as the result of a good harvest when 1947-48 receipts were available.

1/ The Australian Wheat Board recently raised the export price of wheat to 19/6 (\$3.14) a bushel f.o.b. shipping ports in bulk and 20/3½ (\$4.27) in bags. It is not known if this price will apply under any agreement which might be concluded with Britain. In August 1946 export price for wheat in Australia was about \$1.79 a bushel f.o.b. ports.



# CALENDAR OF WHEAT EVENTS



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- Oct. 29 George Broomhall's Corn Trade News quotes an official announcement from "Pravda" concerning the Russian harvest. Total yield of all cereals in 1947 is said to be 58 per cent greater than in 1946. Up to October 5 cereals had been harvested on an area estimated to be 19 million acres larger than a year ago. The Asiatic Governments are said to have made particularly fine contributions in wheat.
- Canadian wheat exported during the season 1946-47 was largely composed of rust-resistant wheats--according to the annual varietal survey made of official samples taken from cargoes leaving the Lakehead, Churchill and Vancouver.
- Nov. 4 The first formal session of the Council of the Food and Agriculture Organization (World Food Council) opened at 10:30 this morning in Washington under the chairmanship of Viscount Bruce of Melbourne. The Council is composed of 18 members of FAO.
- The Roumanian wheat crop is estimated at 52,320,000 bushels. Pre-war production was double this figure--Broomhall.
- Nov. 8 Stocks of Canadian wheat in store or in transit in North America, midnight October 30, were 147.9 million bushels compared with 144.2 millions on October 23 and 149.6 millions at the end of October last year.
- Nov. 11 The International Emergency Food Council by unanimous vote today recommended to its 35 member nations that they dissolve IEFC and authorize the transfer of its functions, organization, and staff to a new International Emergency Food Committee of the Council of the Food and Agriculture Organization.
- Nov. 14 The Bureau of the Census, United States Department of Commerce, estimated that 24.8 million sacks of wheat flour were produced in the United States in September, 4 per cent less than the 25.9 million sacks produced in August, but 5 per cent greater than the September 1946 output of 23.7 million sacks.
- Third estimate of production places Canadian 1947 wheat crop at 340.8 million bushels. Production in the Prairie Provinces is placed at 319 million bushels.
- Trade reports indicate that United Kingdom farmers will be paid an additional £3 per acre on the first ten acres seeded to wheat. This incentive is hoped to provide an additional 500,000 acres of seeded acreage. It is reported that the minimum fixed price for wheat to U.K. producers next season will equal \$2.48 per bushel on farms.
- Acreage sown to fall wheat in Ontario this season is estimated to be 16 per cent more than last year and fall rye 11 per cent higher. These crops have made very satisfactory growth despite the dry period in October.
- Nov. 21 Holland will conserve wheat by mixing native and foreign wheat flour with rye, corn and potato flour--Broomhall.
- With hand-picked kernels of Reward spring wheat, grown between rows of trees on a six acre fruit ranch, Mrs. Amy Grace Kelsey, Erickson, B.C. won the wheat championship at the Royal Winter Fair in Toronto. Mrs. Kelsey won the wheat queen title last year at the Chicago International Grain and Livestock Exposition.
- Nov. 25 Official estimates place the South African wheat crop at 19.2 million bushels compared with 14.8 million bushels harvested last year and a 1935-39 average of 16.3 million bushels.
- Nov. 30 S. J. Allsop of Red Deer, Alberta has been named wheat king at Chicago International Grain and Livestock Exposition. His winning entry was Reward variety wheat.