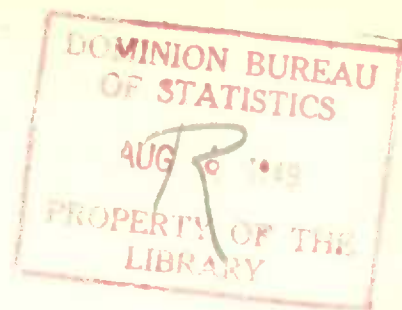


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GOVERNMENT OF CANADA



MONTHLY REVIEW OF THE WHEAT SITUATION



JULY, 1949



DOMINION BUREAU OF STATISTICS
DEPARTMENT OF TRADE AND COMMERCE

MONTHLY REVIEW
OF THE
WHEAT SITUATION
JULY, 1949

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MONTHLY REVIEW OF THE WHEAT SITUATION

JULY 1949

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WORLD WHEAT SITUATION

1949 World Wheat Crop Prospects - With wheat harvesting operations now general in much of the northern hemisphere and seeding operations practically completed in Australia and the Argentine, some indication of the 1949 world wheat area and crop prospects are now available. While detailed information on the 1949 world wheat acreage is not yet known, there has been a definite trend, particularly in the major producing areas, to increase the acreage for harvest in 1949-50. The United States, Canada and Australia have each seeded greater acreages than in 1948. The Argentine government has appealed to wheat producers in that country to increase the wheat acreage by 3.7 million acres and it is reported that spring wheat acreage in Russia has increased approximately 4 million acres over last year.

The only major exception to the general trend in increased wheat acreages appears to be in Europe. Despite definite plans on the part of many governments to encourage increases, actual plantings have fallen short of officially projected targets in several countries with the result that European wheat acreage, excluding that of Russia, is likely to differ little from last year.

In the United States the acreage of all wheat for harvest in 1949, estimated at 75.5 million acres, is 5 per cent above the 71.9 million acres harvested in 1948, and exceeds the previous record of 74.4 million acres harvested in 1947 by 1.5 per cent. The total planted acreage of all wheat in the United States this year is estimated at 83.2 million acres, exceeding by 6 per cent the previous record of 78.2 million acres planted for the 1947 crop. In Canada the 1949 wheat acreage is estimated at 27.5 million acres, second only to the record 28.7 million acres planted in 1940, and 17 per cent above the ten-year (1939-1948) average of 23.5 million acres.

With seeding in Australia and Argentina nearing completion, indications are that there will be some increase in wheat acreage in the southern hemisphere. A preliminary report places this year's Australian wheat acreage at 13.3 million acres compared with 13.0 million in 1948 and 13.9 million in 1947. Official statements regarding the wheat growers' response to the Argentine government's appeal for increased acreage have been optimistic but trade sources indicate that only a limited increase is likely and that plantings will fall short of the goal of 17.3 million acres.

Despite increased acreages in many of the larger producing areas, present prospects are for a somewhat smaller wheat crop than in 1948. Preseasonal rainfall was inadequate over much of Europe and western Canada; spring rains over large sections of the same areas were not sufficient to promote proper growth; and insect infestations and plant disease took above-normal tolls in several regions. Indications are that the breadgrain output in Europe, excluding the Soviet Union, in 1949 will be about 5 per cent below the 1948 level and more than 10 per cent below the 1935-39 average*. On the basis of conditions at July 1, the United States wheat crop was estimated at 1,189 million bushels, 8 per cent less than the 1,288 million bushels produced last year but about 20 per cent more than the average of 992 million bushels. Although the combined carry-over and prospective new-crop supplies were insufficient to necessitate the introduction of marketing quotas, the United States Department of Agriculture has announced national wheat acreage allotments of 68.9 million acres for the 1950 crop, a reduction of 17 per cent from this year's seeded acreage.

*According to the Office of Foreign Agricultural Relations,
United States Department of Agriculture.

The first official estimate of Canada's 1949 wheat crop will not be released until August 16. Despite a near-record acreage, however, present indications are that the outturn will be below last year's 393.3 million bushels. The condition figure at June 30 for all wheat was only 72 per cent of the long-time average yield (16 bushels per acre). Although there has been some improvement in moisture conditions during July, deficiencies in preseasonal precipitation continued to affect crop development adversely, especially in those areas where rainfall is normally low. Early threshing returns of fall wheat in several sections of Ontario indicate that the drought has not affected yields as much as had been expected. The acreage sown to fall wheat, however, represents only 2.9 per cent of the Canadian total so that even an above-average yield would have comparatively little effect on the over-all Canadian production outlook.

International Wheat Council - The International Wheat Council, consisting of representatives of countries ratifying the International Wheat Agreement negotiated last March, met in Washington on July 5 to set up the administrative procedure implementing the agreement. F. Sheed Anderson of the United Kingdom was elected chairman of the council for the 1949-50 crop year and Edwin McCarthy of Australia as vice-chairman. London, England, was chosen as the permanent site of headquarters for the International Wheat Council.

Two important committees were elected by the council during its Washington session. The Executive Committee consists of Canada, Australia, United States, Belgium, the Netherlands, Luxembourg, Egypt, India, Italy, South Africa and the United Kingdom. The Price Equivalent Committee is made up of Canada, Australia, United States, Belgium, the Netherlands, Luxembourg, India and the United Kingdom.

While only 22 of the original 42 negotiators of the agreement had ratified it by the deadline of July 1, these countries represented sufficient quantities of guaranteed purchases and sales to make the pact effective. An extension of the deadline for depositing ratifications is expected to enable other negotiating countries to participate in the new multilateral wheat agreement. The council adjourned its first sessions on July 9 and will reconvene in London, England, in November.

THE CANADIAN WHEAT SITUATION

Crop and Weather Conditions in the Prairie Provinces - The following summary of crop and weather conditions in the Prairie Provinces is taken from the July 26 "Telegraphic Crop Report" published by the Agriculture Division, Dominion Bureau of Statistics:

Fairly general rains occurred over most of the Prairie Provinces during the past week. Average rainfall since April 1 for Manitoba, Saskatchewan and Alberta now stands at 2, 7, and 17 per cent below normal respectively--a marked improvement in all three provinces over a week ago. Preseasonal precipitation, however, was far below normal in the greater part of the west and this factor continues to affect crop development adversely, particularly in the normally low rainfall areas of the prairies. Prospects in Manitoba with few exceptions remain good to excellent. Rains have well maintained the satisfactory condition already established in northern and eastern districts of Saskatchewan, and should now carry the crops to maturity in those areas. Some improvement is noted in central and western districts but relief came too late to most of the drought area in south-central and south-western Saskatchewan where the principal benefit accruing will be to pasture and fodder crops. Crop prospects in Alberta

are still, with some exceptions, generally poor to fair although good rains have improved late-sown crops and relieved the feed situation in central and northern parts of the province.

Delivery Quotas - The Canadian Wheat Board announced on July 30 that delivery quotas on wheat, oats and barley would be left 'open' after July 31st until new crop deliveries and shipments reach such a volume as may make necessary the establishment of local delivery quotas for one or more of these grains. However, such local quotas, if and when established, will be as liberal as possible.

Grain Inspection Fees Increased - Effective August 1, 1949, the fees charged by the Board of Grain Commissioners for the inspection of grain in accordance with the provisions of The Canada Grain Act will be increased from \$1.00 to \$2.00 per car for grain sampled and inspected in railway car lots, and from \$1.00 to \$2.00 per thousand bushels for grain inspected on delivery from terminal elevators.

Supply Situation - Total exports of wheat and wheat flour during the first eleven months of the current crop year amounted to 207.2 million bushels, an increase of 28.4 million bushels over the comparable period of 1947-48. Exports of wheat as grain to June 30 amounted to 161.9 million bushels, an increase of 41.4 million bushels over last year's total for the same period. Exports of flour in terms of wheat, however, were 13.0 million bushels below the 1947-48 total for the first eleven months. The balance remaining on July 1 for export or carry-over was estimated at 114.1 million bushels compared with 93.7 million bushels on the same date last year.

Canadian Wheat Supplies

	1948-49	1947-48
	- million bushels -	
Carry-over in North America July 31	77.7	86.1
New Crop	393.3	341.8
Imports of wheat and wheat flour, Aug. 1 - May 31	0.3	0.6
 Total Supply	 471.3	 428.5
Estimated domestic requirements	150.0	156.0
 Available for export or carry-over	 321.3	 272.5
 Deduct:		
Overseas clearances of wheat as grain Aug. 1 - June 30	159.4	120.4
United States imports of Canadian wheat Aug. 1-June 30	2.5 ^{1/}	0.1
 Total wheat exports	 161.9	 120.5
Exports of wheat flour in terms of wheat Aug. 1-June 30	45.3 ^{2/}	58.3 ^{2/}
 Total exports wheat and wheat flour	 207.2	 178.8
Balance on July 1 for export or carry-over	114.1	93.7

^{1/} June 1949 data not yet available.

^{2/} Adjusted for time-lag in returns made by Customs.

Wheat Crop Conditions at June 30, 1949 -

The following is extracted from the Dominion Bureau of Statistics' report on the condition of field crops as at June 30, 1949. For later information on crop and weather conditions in the Prairie Provinces see page 2 of this issue.

The spring wheat condition figures for Alberta and Saskatchewan based on weather factors indicated significantly poorer yields in prospect at June 30 this year than at the same time a year ago. In these two provinces the wheat condition was 33 and 23 points respectively below the condition indicated at June 30 a year ago. Manitoba's wheat condition while down 5 points from last year was still above the long-time average. It is important to emphasize, however, that condition figures do not necessarily reflect ultimate yields. Any deviation from normal in respect to weather factors, plant diseases or insect infestations between June 30 and harvest time may lead to outturns which will vary considerably from those apparently indicated by the June 30 numerical condition figures.

Condition of Wheat by Crop Districts in the Prairie Provinces -

The two charts on the following page show the condition of the spring wheat crop within crop districts of the Prairie Provinces as it existed at June 30, for 1949 and 1948. The charts are directly comparable as between the two years. The crop district condition figures are based on the more important weather factors affecting the growth of the wheat plant, including precipitation during the preceding autumn period, and precipitation and temperatures during the months of April, May and June.

The sharp difference in wheat condition between adjacent crop districts as shown on the charts is an inherent characteristic where crop-district averages of condition are employed, and the true gradations of condition must be inferred. The condition figures are expressed as percentages of the long-time average yields of wheat for each province, and therefore the condition of wheat as shown in the charts is not directly comparable as between provinces.

The condition of wheat in Manitoba at June 30 this year at 108 was normal or above normal in all crop districts of the province except Nos. 1, 2, 4, 5 and 12. In these five districts, where nearly one-third of the total seeded wheat acreage in the province is located, the condition of wheat was somewhat below normal. Compared with last year at this time, with the exception of Crop Districts 2, 3, 4, 5 and 6, wheat condition figures were above those of last year. In those districts where condition at June 30 this year was below that of a year ago, rainfall during May and June was below normal.

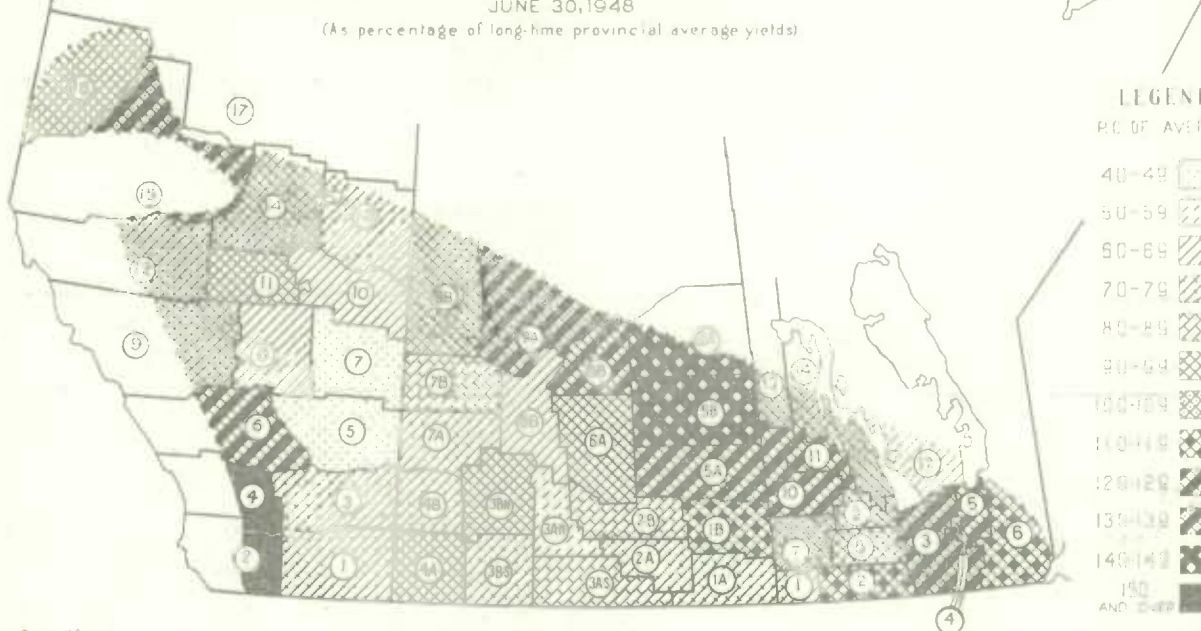
In Saskatchewan the condition of wheat at June 30 this year was 70 per cent of normal. Of the entire province only six districts located in eastern and north-central Saskatchewan indicated conditions better than normal. In the major wheat growing districts of central and southern Saskatchewan there was a considerable area in which the wheat crop condition was less than 50 per cent of normal. Compared with last year, in only two districts, 1A and 8A, was the condition of wheat higher than at June 30 a year ago. In all but four of the remaining eighteen districts the condition of wheat was considerably below that of last year. Below normal rainfall for April through June in most districts and inadequate preseasonal rainfall were among factors contributing to the relatively low June 30 condition of wheat.

Of the three Prairie Provinces, Alberta has fared less well than the other two having an average wheat condition figure at June 30 of only 61 per cent of normal. Below normal wheat condition was indicated at June 30 in all districts except Crop District 2 in the extreme south-western part of the province and in Crop Districts 15 and 16 in the north-west.

CONDITION OF SPRING WHEAT IN THE PRAIRIE PROVINCES, BY CROP DISTRICTS

JUNE 30, 1948

(As percentage of long-time provincial average yields)



LEGEND

P.C. OF AVERAGE

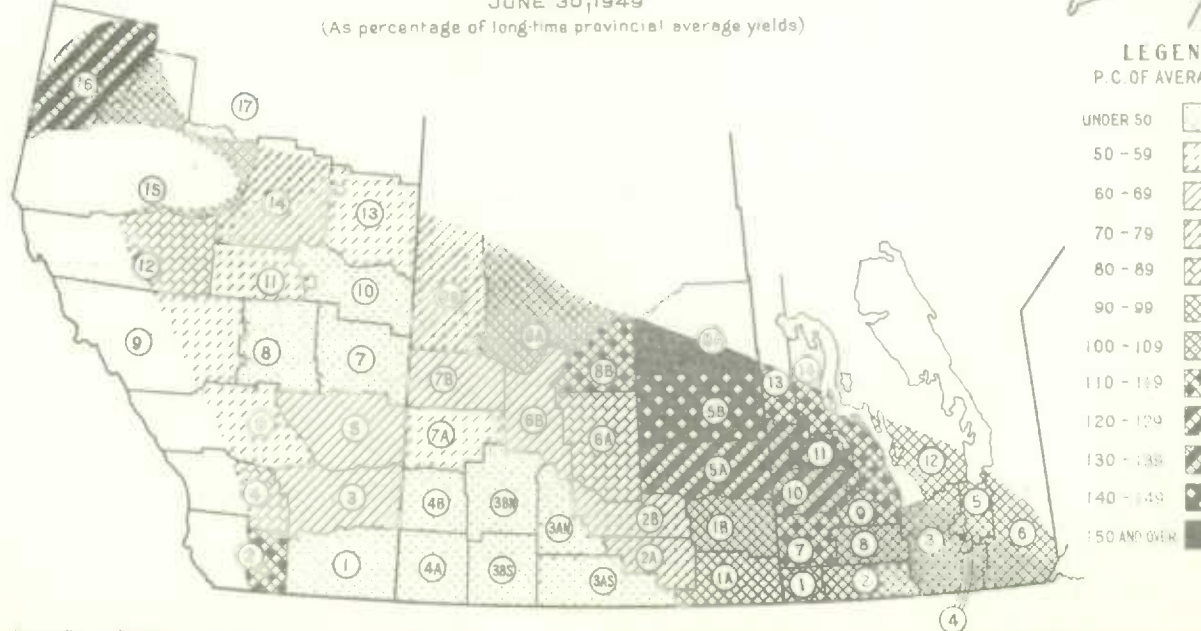
40-49	[Pattern]
50-59	[Pattern]
60-69	[Pattern]
70-79	[Pattern]
80-89	[Pattern]
90-99	[Pattern]
100-109	[Pattern]
110-119	[Pattern]
120-129	[Pattern]
130-139	[Pattern]
140-149	[Pattern]
150 AND OVER	[Pattern]

Department of Statistics

CONDITION OF SPRING WHEAT IN THE PRAIRIE PROVINCES, BY CROP DISTRICTS

JUNE 30, 1949

(As percentage of long-time provincial average yields)



LEGEND

P.C. OF AVERAGE

UNDER 50	[Pattern]
50-59	[Pattern]
60-69	[Pattern]
70-79	[Pattern]
80-89	[Pattern]
90-99	[Pattern]
100-109	[Pattern]
110-119	[Pattern]
120-129	[Pattern]
130-139	[Pattern]
140-149	[Pattern]
150 AND OVER	[Pattern]

Department of Statistics

Crop Acreages in the Prairie Provinces, 1949 - Wheat acreage in the three Prairie Provinces in 1949 is estimated at 26.5 million acres compared with 23.0 million in 1948. This year's wheat acreage represents an increase of 15 per cent over that of last year and is second only to the record 27.8 million acres seeded in 1940. Oat acreage this year at 7.3 million acres is 3 per cent below that of a year ago, while barley acreage is down 8 per cent to 5.6 million acres. Sharp reductions have occurred in the acreages planted to both flaxseed and rye, with flaxseed dropping from 1.9 million acres to 0.3 million and rye from almost 2 million acres to 1.1 million. Summerfallow acreage in 1949 at 21 million is up one million acres from the 1948 area.

The 1949 acreage estimates are based on returns from the annual June Survey of field crops conducted by the Agriculture Division, Dominion Bureau of Statistics. The estimates are preliminary only and are subject to revision in the light of marketing and other check data which will become available after the close of the crop year.

Preliminary Estimate of Crop and Summerfallow Acreages,
Prairie Provinces, 1949

Province and Crop	1948 Area	Per Cent of 1948	1949 Area	Province and Crop	1948 Area	Per Cent of 1948	1949 Area
	acres	p.c.	acres		acres	p.c.	acres
<u>MANITOBA</u>				<u>ALBERTA</u>			
Spring Wheat	2,397,000	132	3,167,000	Spring Wheat	6,259,000	121	7,586,000
Oats	1,491,000	114	1,703,000	Oats	2,392,000	94	2,255,000
Barley	1,540,000	110	1,699,000	Barley	2,226,000	95	2,118,000
Fall Rye	94,000	43	40,000	Fall Rye	400,000	42	170,000
Spring Rye	21,000	29	6,100	Spring Rye	212,000	73	155,000
All Rye	115,000	40	46,100	All Rye	612,000	53	325,000
Flaxseed	1,062,000	14	146,000	Flaxseed	250,000 ^{1/}	15	37,500
Summerfallow	2,056,000	105	2,156,000	Summerfallow	6,199,000	99	6,116,000
<u>SASKATCHEWAN</u>				<u>PRAIRIE PROVINCES</u>			
Spring Wheat	14,389,000	109	15,737,000	Spring Wheat	23,045,000	115	26,490,000
Oats	3,652,000	93	3,381,000	Oats	7,535,000	97	7,339,000
Barley	2,316,000	78	1,800,000	Barley	6,082,000	92	5,617,000
Fall Rye	988,000	56	557,000	Fall Rye	1,482,000	52	767,000
Spring Rye	250,000	53	133,000	Spring Rye	483,000	61	294,100
All Rye	1,238,000	56	690,000	All Rye	1,965,000	54	1,061,100
Flaxseed	588,000	22	129,000	Flaxseed	1,900,000 ^{1/}	16	312,500
Summerfallow	11,736,000	108	12,686,000	Summerfallow	19,991,000	105	20,958,000

^{1/} Revised.

Farmers' Marketings of Wheat in the Prairie Provinces

Week ending		Manitoba	Saskatchewan	Alberta	Total	Last Year
- bushels -						
August	1-5	51,716	410,600	584,457	1,046,773	805,165
	12	132,832	707,579	556,582	1,396,993	1,708,040
	19	245,027	1,517,800	357,533	2,120,360	3,859,109
	26	1,945,212	6,126,122	2,371,473	10,442,807	6,431,461
September	2	6,536,917	15,904,916	3,604,565	26,046,398	13,937,958
	9	7,878,137	17,182,853	6,427,530	31,488,520	31,427,694
	16	5,695,795	21,704,886	7,079,407	34,480,088	22,920,805
	23	3,306,717	15,233,933	9,008,967	27,549,617	6,779,351
	30	1,661,381	9,102,599	7,083,138	17,847,118	13,625,573
October	7	1,038,266	6,574,159	6,395,661	14,008,086	21,220,179
	14	523,365	5,228,970	5,493,253	11,245,588	11,999,317
	21	610,668	4,493,233	4,158,751	9,262,652	13,270,109
	28	503,263	4,069,166	3,294,105	7,866,534	9,793,740
November	4	650,593	3,397,120	2,580,479	6,628,192	7,964,001
	11	301,508	3,105,262	1,567,409	4,974,179	5,103,341
	18	440,480	2,639,126	1,719,238	4,798,844	4,695,817
	25	305,274	2,468,702	1,639,182	4,413,158	3,681,241
December	2	213,292	2,048,423	1,273,179	3,534,894	2,911,051
	9	311,094	2,059,856	1,068,560	3,439,510	2,752,374
	16	192,926	1,072,566	747,353	2,012,845	2,331,763
	23	212,247	1,433,780	1,425,230	3,071,257	2,063,286
	30	204,642	1,073,904	1,747,875	3,026,421	1,897,414
January	6	295,424	1,330,257	1,813,318	3,438,999	2,537,879
	13	199,693	1,001,110	1,990,051	3,190,854	2,900,392
	20	203,620	1,203,302	2,239,333	3,646,255	1,650,355
	27	101,307	356,507	658,177	1,115,991	1,502,720
February	3	97,574	445,126	879,334	1,422,034	1,418,533
	10	137,667	456,472	787,234	1,381,373	903,652
	17	60,233	372,213	333,045	765,491	831,637
	24	51,907	249,236	418,893	720,036	556,642
March	3	79,637	484,989	758,330	1,322,956	832,928
	10	125,773	705,324	999,082	1,830,179	861,834
	17	161,303	651,330	1,066,745	1,879,378	1,077,921
	24	152,498	469,852	1,030,684	1,653,034	1,202,150
	31	120,964	543,507	527,340	1,191,811	834,846
April	7	122,598	471,559	693,144	1,287,301	732,709
	14	67,468	978,754	1,031,334	2,077,556	674,476
	21	296,783	1,662,072	831,773	2,790,628	469,721
	28	413,197	1,427,838	504,333	2,345,368	427,355
May	5	327,579	871,636	496,721	1,695,936	739,274
	12	267,715	850,016	486,955	1,604,686	1,223,879
	19	278,463	1,028,307	526,637	1,833,407	1,439,654
	26	186,231	1,209,916	464,604	1,860,751	1,370,788
June	2	264,307	1,033,407	444,436	1,742,150	2,820,876
	9	333,337	1,033,790	474,896	1,842,023	4,108,579
	16	422,197	1,354,520	496,499	2,273,216	4,450,813
	23	294,805	1,240,538	420,419	1,955,762	4,188,139
	29	267,830	1,157,291	464,192	1,889,313	2,815,927
July	7	318,199	1,072,037	429,362	1,819,598	2,507,856
	14	83,412	674,234	376,444	1,134,090	1,537,256
Total		38,693,073	151,890,695	91,827,242	282,411,010	237,797,580

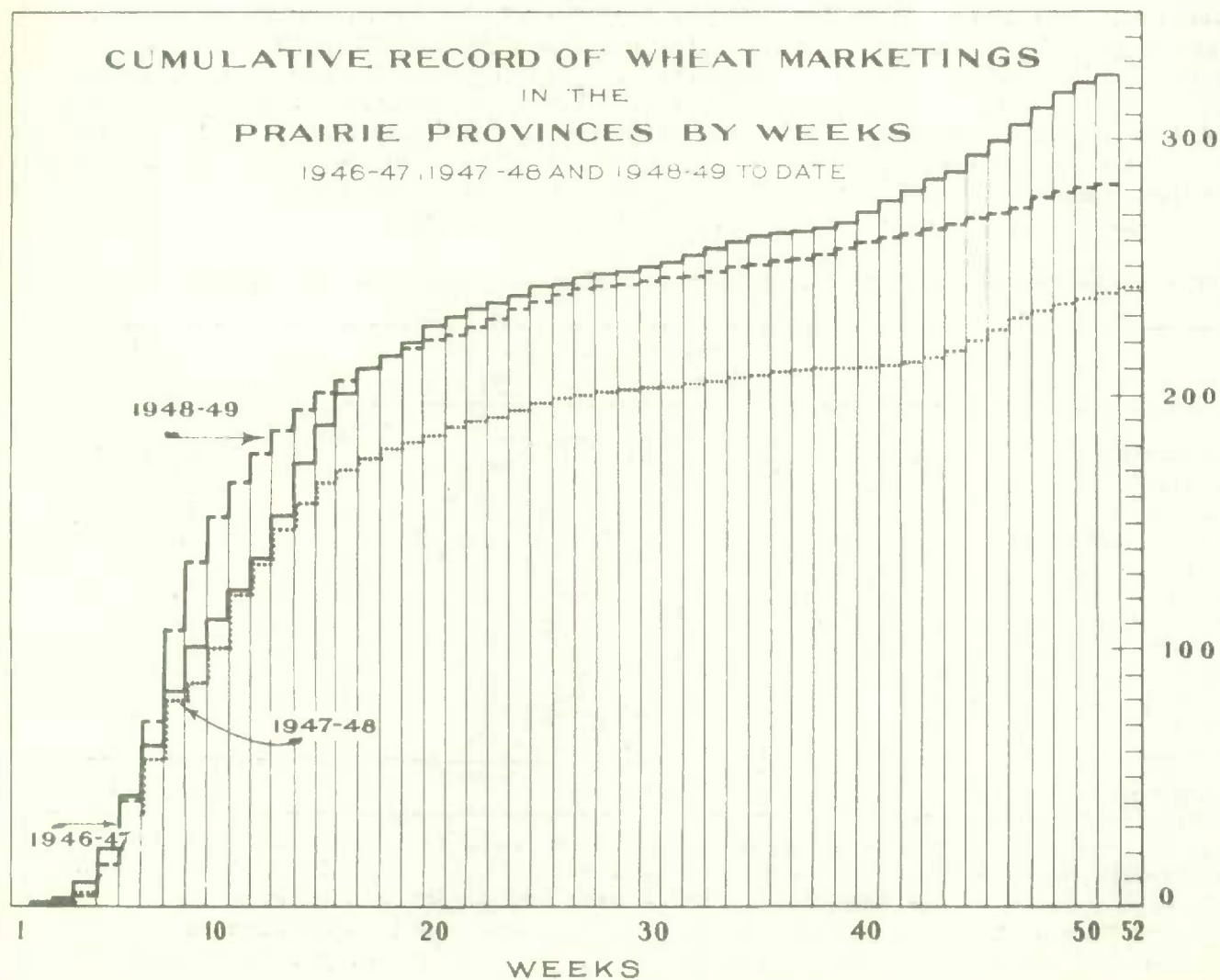
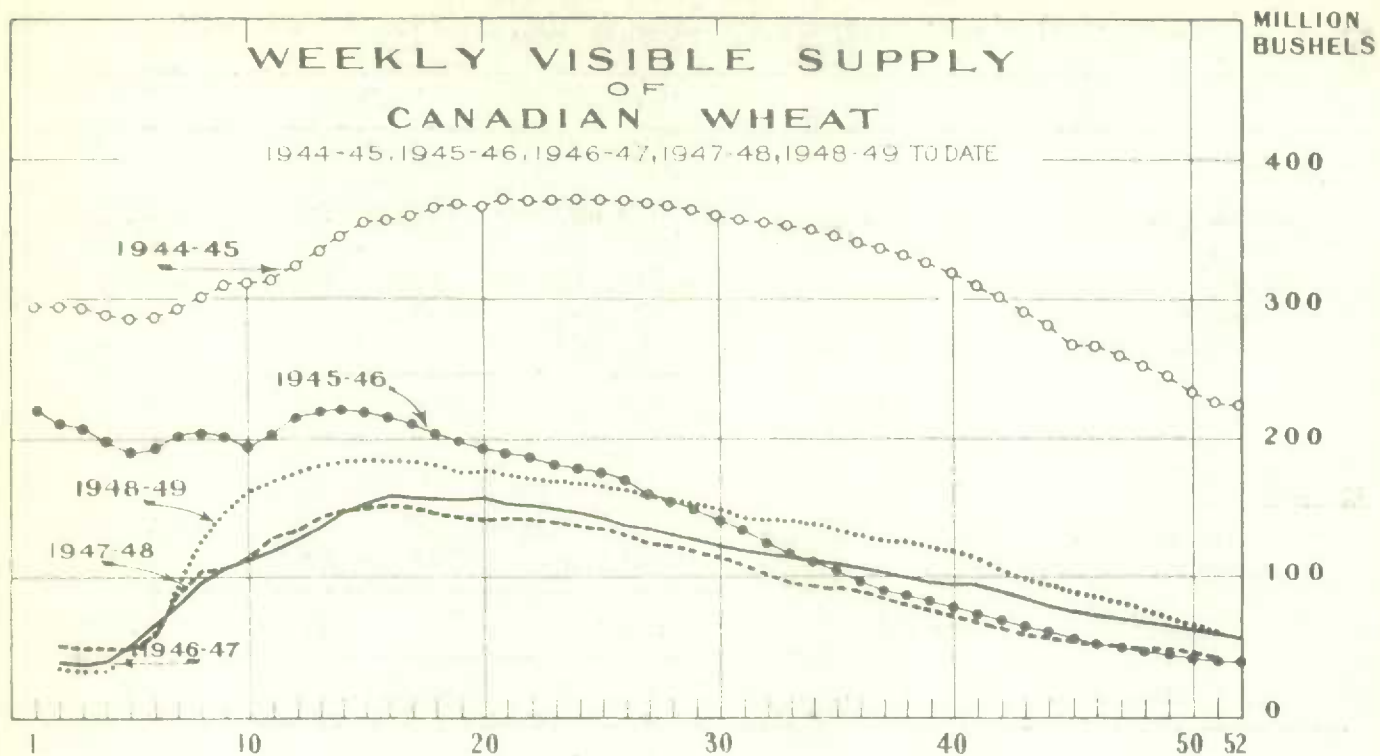
Visible Supply of Canadian Wheat, July 14, 1949 Compared With
Approximately the Same Date, 1948 and 1947

	1949	1948	1947
	- 000 bushels -		
Country Elevators - Manitoba	1,612	1,454	1,825
Saskatchewan	5,987	6,979	8,710
Alberta	5,584	5,028	7,850
Total	13,183	13,461	18,385
Interior Private and Mill Elevators	3,849	2,626	5,080
Interior Public & Semi-Public Terminals ..	52	241	86
Vancouver-New Westminster	7,013	1,661	3,894
Churchill	788	540	996
Fort William and Port Arthur	5,900	7,978	9,730
In Transit - Rail (Western Division)	3,278	3,955	4,410
Eastern Elevators - Lake Ports	13,062	3,907	9,246
St. Lawrence and Seaboard Ports	9,503	4,076	1,324
In Transit - Lake	2,325	2,305	4,670
In Transit - Rail (Eastern Division)	724	784	1,470
United States Ports	117	35	97
Total	59,794	41,569	59,388

The visible supply of Canadian wheat in all commercial positions at mid-night July 14, 1949 amounted to 59.8 million bushels compared with 41.6 million and 59.4 million bushels on approximately the same date in the preceding two years. With wheat moving into export channels in fairly substantial volume, visible supplies dropped by 21.1 million bushels in the four-week period ending July 14 in the current crop year. With the single exception of Churchill, decreases were registered in all positions, the greatest reductions taking place in stocks in country elevators, eastern lake ports and seaboard ports on both coasts. Commercial supplies of wheat in the latter positions, however, were still well above the levels of the preceding two years.

Grading of Wheat Inspected, August-June 1948-49 and 1947-48

	Inspections -			
	August 1948 to June 1949		August 1947 to June 1948	
	Cars	Per Cent	Cars	Per Cent
1 Manitoba Northern	48,931	30.6	9,692	7.3
2 Manitoba Northern	64,905	40.6	42,858	32.1
3 Manitoba Northern	14,814	9.3	22,099	16.5
4 Manitoba Northern	3,221	2.0	3,747	2.8
Garnet	2,059	1.3	235	0.2
Amber Durum	8,572	5.4	4,819	3.6
Alberta Winter	1,580	1.0	841	0.6
Toughs - All Varieties and Grades ..	9,270	5.8	42,203	31.6
All others	6,403	4.0	7,069	5.3
Total	159,755	100.0	133,563	100.0



Wheat Shipments to the United States by Destination,
August 1, 1948 - July 14, 1949
Compared with Approximately the same period, 1947-48 and 1946-47

	1948-49	1947-48	1946-47
	bu.	bu.	bu.
<u>By Vessel</u>			
Buffalo	11,619,687	14,326,600	8,442,773
Oswego	737,500	-	-
Erie	1,575,567	1,155,260	2,948,381
Toledo	325,053	-	-
Duluth-Superior	111,902	-	-
Total - Vessel Shipments	14,369,709	15,481,860	11,391,154
<u>By Rail</u>			
U.S.A. Seaboard Ports	-	-	1,429,863
Other U.S.A. Points	165,000	60,577	18,996
Total - Rail Shipments .	165,000	60,577	1,448,859
GRAND TOTAL	14,534,709	15,542,437	12,840,013

Shipments of Canadian wheat to the United States, either for re-export or retention, from August 1, 1948 to July 14, 1949 amounted to 14.5 million bushels, compared with 15.5 million and 12.8 million bushels for approximately the same periods in 1947-48 and 1946-47, respectively. During the four-week period ending July 14 of the current crop year, shipments of Canadian wheat to the United States amounted to 582,252 bushels. With the exception of 73,000 bushels shipped by rail, all of this amount went by vessel to Buffalo. This port has received the bulk of Canadian wheat destined to the United States during the current crop year, accounting for 80 per cent of the total up to July 14.

Rail Shipments of Wheat to Maritime Ports from Bay, Lake and St. Lawrence Ports

	August 1, 1948 to July 14, 1949	August 1, 1947 to July 15, 1948
	- bushels -	
Collingwood	1,357,387	796,915
Midland	5,443,777	4,084,468
Owen Sound	1,911,907	729,479
Port McNicoll	2,695,480	2,129,024
Goderich	379,769	233,514
Sarnia	996,095	348,217
Port Colborne	27,426	339,496
Humberstone	-	175,000
Toronto	-	68,369
Kingston	-	280,887
Prescott	11,066	8,712
Montreal	3,911	6,617
Total	12,826,818	9,200,698

No rail shipments of wheat to Maritime ports from bay, lake and St. Lawrence ports were recorded during the four weeks ending July 14, 1949 and in the comparable period of the preceding year. Total rail shipments between these groups of ports from August 1, 1948 to July 14, 1949 amounted to 12.8 million bushels, an increase of 3.6 million bushels over the total for the similar period of 1947-48.

Average Wheat Yields, Canada and Provinces

	1908- 1948 Average	1939- 1948 Average	1948	1947	1946	1945	1944	1943	1942	1941	1940	1939
- bushels per acre -												
All wheat -												
Canada	16.3	17.4	16.3	14.1	16.9	13.6	17.9	16.9	25.8	14.4	18.8	19.5
Ontario	24.5	27.9	29.8	24.6	29.3	29.3	30.7	21.7	30.4	26.0	27.7	29.2
Spring wheat -												
Canada	15.9	17.1	15.8	13.8	16.6	13.1	17.5	16.7	25.6	14.1	18.5	19.2
P.E.I.	17.9	19.7	23.0	22.0	20.0	20.0	22.0	18.5	18.0	17.0	19.0	17.0
N.S.	18.4	18.4	20.0	18.0	18.0	16.0	20.0	16.0	21.0	18.0	19.0	18.0
N.B.	18.0	19.9	25.0	20.0	19.0	17.0	20.0	19.0	22.0	17.0	22.0	18.0
Que.	17.1	17.8	19.9	14.9	17.3	17.0	18.8	18.3	19.3	18.0	17.4	16.8
Ont.	18.8	19.6	22.2	18.1	22.0	19.8	20.4	16.8	20.5	18.4	18.8	18.9
Man.	17.1	21.2	23.8	16.8	23.0	18.2	20.1	23.8	27.5	20.9	18.9	19.2
Sask.	14.9	15.9	13.3	12.2	14.6	12.4	18.3	15.2	24.7	12.0	17.1	19.1
Alta.	17.9	17.9	18.4	15.8	18.2	12.9	14.7	17.1	26.8	15.1	20.8	19.3
B.C.	25.1	25.4	21.2	22.8	28.5	24.0	26.0	26.0	28.5	25.0	25.6	26.0
Fall wheat -												
Canada ^{1/}	25.1	28.4	30.3	24.9	29.8	29.8	31.3	22.0	30.9	26.6	28.5	30.3
Ontario	25.2	28.4	30.3	24.9	29.8	29.8	31.3	22.0	30.9	26.6	28.5	30.3

^{1/} Because of the relatively small quantities of fall wheat grown in provinces other than Ontario, separate estimates for this crop in the remainder of Canada were discontinued in 1932.

Lake Shipments of Canadian Grain - Lake shipments of the five major grains from Fort William-Port Arthur from the opening of navigation to July 14, 1949 amounted to 99.2 million bushels. Shipments of wheat at almost 68 million bushels, accounted for over two-thirds of this year's total to date. Both rye and flaxseed shipments were the largest on record during the eleven-year period under review.

Lake Shipments of Canadian Grain from the Opening of Navigation to July 14, 1949
and to approximately the same date, 1939 to 1948

	Wheat	Oats	Barley	Rye	Flaxseed	Total
- bushels -						
1939	61,959,278	6,533,971	5,099,789	840,639	23,117	74,456,794
1940	81,872,805	7,872,850	2,709,937	1,401,349	181,190	94,038,131
1941	119,642,428	4,440,083	2,784,819	2,840,923	466,423	130,174,676
1942	93,831,905	1,102,814	1,538,283	661,517	269,986	97,404,505
1943	83,373,910	15,870,264	19,285,069	1,259,098	1,474,648	121,262,989
1944	123,639,138	30,145,402	18,306,240	4,987,300	3,603,131	180,681,211
1945	139,883,060	44,620,240	19,326,794	2,494,183	1,874,474	208,198,751
1946	41,568,042	26,176,984	8,614,102	676,150	651,176	77,686,454
1947	66,069,032	19,626,428	8,392,336	1,633,576	27,709	95,749,081
1948	40,411,221	8,338,547	6,964,737	301,929	2,967,599	58,984,033
1949	67,955,242	10,028,862	11,087,764	5,813,791	4,307,084	99,192,743

Rail Shipments from Fort William—Port Arthur -

Details of monthly

rail shipments of wheat from the Lakehead for the current and preceding three crop years and the distribution of the June 1949 shipments are set forth in the tables below.

Monthly Rail Shipments of Wheat from the Lakehead, 1945-46 to 1948-49

	1948-49	1947-48	1946-47	1945-46
- bushels -				
August	51,283	90,574	187,825	23,255
September	30,017	91,366	175,773	57,533
October	46,274	131,290	255,754	73,776
November	138,600	100,563	256,249	99,197
December	1,740,405	691,223	1,601,883	2,280,636
January	3,794,390	3,149,421	2,462,002	4,533,707
February	3,720,733	1,851,773	1,816,087	1,127,764
March	1,510,905	3,423,684	1,711,013	2,223,266
April	659,467	371,950	566,006	1,015,730
May	884,171	154,551	361,386	536,462
June	330,348	81,133	241,475	920,233
July		231,414	123,145	130,276
Total		10,368,942	9,758,598	13,021,835

Distribution of Rail Shipments of Wheat from the Lakehead by Provinces and Grades, June 1949

	Ontario	Quebec	New Brunswick	Nova Scotia	Prince Edward Island
- bushels -					
1 Hard	-	2,000	-	-	-
1 Northern	-	91,000	-	-	-
2 Northern	-	75,000	-	-	-
No. 4 Special	2,000	-	-	-	-
No. 5	6,234	40,883	-	833	250
Tough No. 5	333	13,000	-	-	-
Feed	1,500	-	-	-	-
Rej. 2 Nor. Mxd. Htd.	-	12,167	-	-	-
Rej. No. 5 Mixed Heated ...	-	6,500	-	-	-
Rej. 1 C.W. Mxd. Frbnt. ...	1,565	-	-	-	-
1 C.W.A.D.	9,000	1,333	-	-	-
3 C.W.A.D.	1,500	4,500	-	-	-
Sample Heated	9,000	-	-	-	-
Tough Sample Heated	750	-	-	-	-
Sample Red Spring Heated ..	16,500	33,000	-	-	-
Tf. Sple. Red Spring Htd. .	1,500	-	-	-	-
Total	49,882	279,383	-	833	250
Grand Total	330,348				

Freight Assistance Shipments -

Based on claims filed for payment up to June 30, 1949 wheat shipments from the Prairie Provinces to Eastern Canada and British Columbia under the Freight Assistance Plan amounted to 8.3 million bushels in the August-May period of the current crop year. While this year's total is subject to upward revision as additional claims are filed, it is far below last year's freight-assisted wheat shipments of 18.3 million bushels during the comparable period.

Provincial Distribution of Freight-Assisted Wheat Shipments, 1948-49 and 1947-48

1948-49	Ontario	Quebec	New Brunswick	Nova Scotia	Prince Edward Island	British Columbia	Total
- bushels -							
August	397,645	379,067	30,697	37,583	11,985	263,178	1,120,155
September	407,943	324,255	35,188	42,278	18,175	243,858	1,071,697
October	353,715	305,142	25,188	40,273	9,615	246,988	980,921
November	491,952	408,418	23,643	34,810	10,235	231,238	1,200,296
December	270,080	222,266	19,885	31,460	10,950	257,867	812,508
January	403,637	285,845	23,073	31,994	9,188	227,523	981,260
February	290,478	143,383	18,875	24,460	5,403	179,668	662,267
March	134,960	167,075	13,480	19,762	8,618	178,574	522,469
April	119,127	165,320	12,970	16,528	7,147	168,994	490,086
May	230,176	166,847	10,782	14,594	9,653	22,974	455,026
Total	3,099,713	2,567,618	213,781	293,742	100,969	2,020,862	8,300,682*
Same Period 1947-48	7,598,595	5,832,592	632,025	689,085	286,374	3,307,170	18,345,841

* Includes 3,997 bushels for Newfoundland.

Claims filed for payment under the Freight Assistance Plan represent millfeed shipments of 474,283 tons during the ten-month period ending May 31, 1949. On a proportional basis, the provincial distribution of millfeed shipments during the current and preceding crop years has shown little change, Quebec and Ontario together accounting for 75 per cent of the total in the first ten months of both years. The filing of additional claims will necessitate some upward revisions of the current crop year's total diminishing to some extent the difference between the totals for the two years.

Provincial Distribution of Freight-Assisted Millfeed Shipments, 1948-49 and 1947-48

	August 1, 1948 to May 31, 1949	August 1, 1947 to May 31, 1948
- tons -		
Ontario	156,227	224,435
Quebec	201,426	252,126
New Brunswick	31,185	42,320
Nova Scotia	36,634	45,245
Prince Edward Island	7,859	12,035
British Columbia	40,781	57,638
Newfoundland	171	-
Total	474,283	633,799

Monthly Export Clearances, etc., in Comparison with the Customs Exports of
Wheat and Wheat Flour

	Overseas Clearances of Canadian Wheat	U.S. Imports <u>1/</u> of Canadian Wheat for Consumption and Grinding in Bond	Customs <u>2/</u> Exports of Canadian Wheat Flour	Total	Customs <u>3/</u> Exports of Wheat and Wheat Flour
			- 000 bushels -		
<u>1946-47</u>					
August	5,982	227	6,306	12,515	17,339
September	10,131	241	4,080	14,452	11,338
October	12,481	437	5,771	18,689	23,653
November	20,494	441	5,748	26,683	23,008
December	11,044	124	3,604	14,772	17,488
January	14,333	77	6,247	20,657	20,406
February	10,439	75	5,601	16,115	13,639
March	8,121	31	6,211	14,363	14,085
April	10,286	4	7,113	17,403	12,152
May	17,859	1	10,623	28,483	28,701
June	22,192	5	7,301	29,498	31,594
July	18,354	9	7,428	25,791	26,404
Total	161,716	1,672	76,033	239,421	239,807
<u>1947-48</u>					
August	9,601	2	7,048	16,651	18,140
September	9,363	12	5,864	15,239	15,990
October	9,680	35	7,001	16,716	17,204
November	12,006	1	5,796	17,803	22,763
December	7,480	2	3,829	11,311	20,717
January	15,175	3	4,064	19,242	15,961
February	11,296	71	4,970	16,337	10,743
March	10,323	2	4,082	14,407	15,058
April	10,080	3	5,783	15,866	9,965
May	12,955	1	5,086	18,042	19,924
June	12,464	1	4,730	17,195	15,881
July	12,949	-	3,224	16,173	17,129
Total	133,372	133	61,477	194,982	199,475
<u>1948-49</u> <u>4/</u>					
August	9,111	1	4,244	13,356	13,829
September	10,555	3	3,671	14,229	11,942
October	11,566	1	6,509	18,076	21,913
November	15,604	6	5,455	21,065	20,792
December	12,744	8	3,803	16,555	18,205
January	14,431	22	3,756	18,209	18,342
February	12,053	43	3,082	15,178	14,214
March	13,806	206	3,612	17,624	13,707
April	13,769	869	3,921	18,559	20,303
May	22,483	1,381	4,135	27,999	26,683
June	23,286	5/	3,068	26,354	24,850
Total	159,408	2,540	45,256	207,204	204,780

1/U.S.A. Official figures. 2/Exports for months of August 1946 to March 1949 revised to remove effect of time lag in the returns made by Customs. Subsequent months to be revised as data become available. 3/Unadjusted, as published by External Trade Division, Dominion Bureau of Statistics. 4/Subject to revision. 5/U.S.A. imports for June not available.

Exports of Canadian Wheat and Wheat Flour
August 1948 to June 1949

	May		June		August - June	
	Wheat Flour 1/	Wheat 2/	Wheat Flour 1/	Wheat 2/	Wheat Flour 1/3/	Wheat 2/
	- bushels -		- bushels -		- bushels -	
<u>COMMONWEALTH COUNTRIES</u>						
United Kingdom	2,414,979	16,241,020	1,668,357	13,192,555	21,397,199	117,714,480
Eire	2,088	-	-	186,667	19,579	1,894,159
<u>Africa</u>						
Br. E. Africa	-	-	-	-	5,513	-
Br. S. Africa	-	1,652,878	459	2,590,000	228,492	6,057,474
<u>Br. West Africa</u>						
Gold Coast	11,997	-	17,960	-	184,496	-
Nigeria	112	-	1,606	-	11,361	-
Sierra Leone	2,758	-	6,876	-	60,953	-
Other Br.W.Africa	-	-	-	-	2,066	-
<u>Asia</u>						
Aden	-	-	-	-	73,782	-
Hong Kong	25,821	-	41,738	-	848,619	-
India	2,295	1,021,526	-	1,698,507	2,484	10,279,286
Pakistan	-	-	-	-	459,144	-
<u>Europe</u>						
Gibraltar	-	-	1,489	-	159,925	-
Malta	-	212,800	-	-	-	1,865,132
<u>North America</u>						
Bahamas	32,063	-	20,155	-	234,679	-
Barbados	55,616	17	29,376	-	418,667	17
Jamaica	114,480	1,770	131,967	-	1,107,071	21,706
St. Vincent	-	-	-	-	-	6
Trinidad-Tobago	151,853	-	205,164	-	2,085,369	166
Leeward-Windward Is.	81,999	-	55,832	-	697,756	-
Bermuda	14,877	-	9,954	-	105,962	-
British Honduras	2,065	-	5,269	-	34,298	-
Newfoundland	-	-	-	-	1,014,340	17
<u>South America</u>						
British Guiana	85,032	-	81,500	-	841,416	-
<u>TOTAL COMMONWEALTH COUNTRIES</u>						
	2,998,035	19,130,011	2,277,702	17,667,729	29,993,171	137,832,443

Note: Exports to Newfoundland August to March 31 only. Not reported subsequently.

Exports of Canadian Wheat and Wheat Flour - continued

	May		June		August - June	
	Wheat Flour 1/	Wheat 2/	Wheat Flour 1/	Wheat 2/	Wheat Flour 1/3/	Wheat 2/
	- bushels -		- bushels -		- bushels -	
<u>FOREIGN COUNTRIES</u>						
<u>Africa</u>						
Azores and Madeira	1,278	-	-	-	15,611	-
Belgian Congo	5,738	-	1,040	-	95,108	-
Canary Island	2,295	-	230	-	11,804	-
Egypt	4,936	157,613	-	154,723	213,197	2,398,021
French Africa	-	-	-	-	20,146	-
Liberia	1,773	-	688	-	8,887	-
Morocco	-	-	13,136	-	104,554	-
Portuguese Africa	1,570	-	39,308	-	145,053	-
Spanish Africa	-	-	-	-	3,672	-
<u>Asia</u>						
Arabia	56,074	24,334	20,205	-	112,819	445,864
China	-	-	-	-	350,172	522,666
Indonesia	-	-	7,938	-	9,738	-
Iran	-	-	-	-	3,568	306,134
Israel	-	-	-	79,699	-	264,112
Japan	1,606	-	22	-	2,821	-
Lebanon	-	-	-	-	-	448,408
Palestine	16,290	-	-	-	257,917	-
Philippine Is.	450,536	-	213,314	-	2,753,686	-
Portuguese Asia	11,475	-	-	-	99,621	-
Siam	4,590	-	4,360	-	46,699	92
Syria	-	-	-	-	2,617,722	-
Trans-Jordan	-	-	8,636	-	17,942	-
<u>Europe</u>						
Belgium	81,972	1,383,845	45,558	2,647,173	330,907	4,833,013
Denmark	-	-	-	-	4,568	-
Germany	38,768	-	26,806	-	865,584	-
Greece	7,690	-	-	-	69,552	-
Iceland	-	-	-	-	243,972	-
Italy	21,483	264,000	5,692	643,000	2,240,576	3,646,246
Netherlands	688	-	-	-	98,567	361,066
Norway	-	-	-	-	-	957,830
Portugal	1,724	37,333	1,652	642,300	84,029	1,302,218
Spain	2,282	-	-	-	2,282	-
Switzerland	70,902	433,533	101,938	895,762	337,032	4,397,039
Yugoslavia	1,148	-	459	-	11,246	-
<u>North America</u>						
Costa Rica	18,364	-	19,827	-	254,150	-
Cuba	40,707	3,000	41,823	-	594,855	3,000
Dominican Republic	16,250	8	5,166	-	173,430	6,008
French W. Indies	-	-	-	-	1,445	-
Guatemala	7,106	-	12,964	-	105,605	-
Haiti	8,973	-	8,649	-	217,494	-
Honduras	2,295	20,000	1,377	7,500	11,016	43,333
Mexico	-	700,000	-	-	-	700,000

Exports of Canadian Wheat and Wheat Flour - concluded

	May		June		August - June	
	Wheat Flour 1/	Wheat 2/	Wheat Flour 1/	Wheat 2/	Wheat Flour 1/3/	Wheat 2/
	- bushels -		- bushels -		- bushels -	
<u>North America - con.</u>						
Nether. Antilles	8,901	-	12,254	-	137,692	-
Nicaragua	1,966	-	1,890	-	24,777	-
Panama	14,517	-	22,527	-	106,794	-
Salvador	6,390	-	2,642	-	43,268	10,000
St. Pierre-Miquelon	1,836	-	2,992	-	20,515	-
<u>Oceania</u>						
French Oceania	-	-	-	-	9	-
Guam	-	-	-	-	4,545	-
Hawaii	-	-	-	-	9,950	-
<u>United States</u>						
For grinding in bond	-	1,073,837	-	4/	-	1,978,396 ^{5/}
For human consumption	108,108	301,058	10,143	4/	216,270	553,765 ^{5/}
Unfit for human consumption	-	5,700	-	4/	-	7,754 ^{5/}
Alaska	-	-	-	-	2,637	266
Virgin Islands	-	-	-	-	207	-
<u>South America</u>						
Bolivia	-	-	-	-	12,213	-
Brazil	-	-	-	-	284,270	-
Colombia	-	-	-	-	13,275	37,147
Ecuador	12,622	-	26,420	6,667	155,362	48,533
French Guiana	-	-	-	26,133	8,388	-
Netherlands Guiana	8,919	-	2,934	-	99,923	-
Peru	-	329,653	-	515,333	50	844,986
Venezuela	94,946	-	127,642	-	1,585,575	-
 TOTAL FOREIGN COUNTRIES	 1,136,718	 4,733,914	 790,232	 5,618,290	 15,262,767	 24,115,897
 GRAND TOTAL EXPORTED	 4,134,753	 23,863,925	 3,067,934	 23,286,019	 45,255,938	 161,948,340

1/ Canadian Customs Returns - conversion rate 4 1/2 wheat bushels equal 1 barrel.

2/ Overseas clearances as reported by the Statistics Branch of the Board of Grain Commissioners. Subject to revision.

3/ Exports for the months of August 1948 to March 1949 revised to remove effect of time lag in the returns made by the Customs.

4/ United States imports for June not available.

5/ Source: United States Department of Commerce, Bureau of Census.

Current Wheat Prices - Prices of Canadian wheat for domestic use and for export to the United Kingdom remain at \$2.05 per bushel (including carrying charges of 5 cents per bushel) basis No. 1 Northern in store Fort William-Port Arthur or Vancouver. The initial price to producers is currently 30 cents per bushel less than the domestic price for the corresponding grade.

During the first part of the five-week period ending July 23 prices set by the Canadian Wheat Board for Class II 'Commercial' wheat (for export to countries other than the United Kingdom) moved downward to a low of \$1.91 per bushel for No. 1 Northern on June 28. Since that date, however, there has been a gradual recovery with prices over the \$2.00 level from July 6 to the end of the period under review.

Weekly Average Prices of Canadian Wheat,
Basis in Store Fort William-Port Arthur and Vancouver
(Source: Statistics Branch, Board of Grain Commissioners, Fort William)

	Week ending				
	June 25	July 2	July 9	July 16	July 23
- cents and eighths per bushel -					
(1) Class I Domestic					
(A) Domestic Use					
1 Hard	205	205	205	205	205
1 Northern	205	205	205	205	205
2 Northern	202	202	202	202	202
3 Northern	200	200	200	200	200
4 Northern	197	197	197	197	197
Number 5	192	192	192	192	192
Number 6	188	188	188	188	188
Feed	186	186	186	186	186
1 C.W. Garnet	200	200	200	200	200
2 C.W. Garnet	198	198	198	198	198
3 C.W. Garnet	196	196	196	196	196
1 Alberta Red Winter	205	205	205	205	205
2 Alberta Winter	204	204	204	204	204
3 Alberta Winter	201	201	201	201	201
1 C.W. Amber Durum	205	205	205	205	205
2 C.W. Amber Durum	202	202	202	202	202
3 C.W. Amber Durum	200	200	200	200	200
(B) Initial Price to Producers - 30 cents per bushel under Schedule A.					
(2) Class II Export					
(A) United Kingdom					
1 Hard	205	205	205	205	205
1 Northern	205	205	205	205	205
2 Northern	202	202	202	202	202
3 Northern	200	200	200	200	200
(B) Commercial					
1 Hard	199/3	193/4	200/1	204	203/5
1 Northern	199/3	193/4	200/1	204	203/5
2 Northern	196/3	190/4	197/1	201	200/5
3 Northern	194/3	188/4	195/1	199	198/5
1 C.W. Amber Durum	199/3	193/4	200/1	204	203/5
2 C.W. Amber Durum	196/3	190/4	197/1	201	200/5
3 C.W. Amber Durum	194/3	188/4	195/1	199	198/5

THE CANADIAN FLOUR MILLING SITUATION

Production - With only one month remaining in the current crop year, it appears that Canadian flour production in 1948-49 will be the lowest since 1941-42. During the first eleven months of 1948-49 flour production in Canada amounted to 18,886,349 barrels, a decrease of approximately 16 per cent from the total for the comparable period of 1947-48. Flour production in June 1949 amounted to 1,665,566 barrels compared with 1,569,841 barrels in the preceding month and 1,910,441 barrels in June, 1948. Mills reporting operations during June had a rated capacity of 98,650 barrels and, on the basis of a 26-day working period, 64.9 per cent of the rated capacity was effective.

Exports - Based on customs returns, exports of Canadian flour in June amounted to 681,763 barrels, the lowest for the current crop year. Total exports for the first eleven months of 1948-49 were 10,056,875 barrels, approximately 22 per cent lower than the total for the similar period of 1947-48.

Production and Exports of Wheat Flour, Canada, 1937-38 to 1948-49

	Production	Exports <u>1/</u>
	- barrels of 196 pounds -	
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	10,205,778
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	14,470,177 <u>2/</u>
1946-47	28,588,456	16,896,233 <u>2/</u>
1947-48	24,159,696	13,661,573 <u>2/</u>
1948-49: August	1,619,752	943,152 <u>2/</u>
September	2,174,417	815,658 <u>2/</u>
October	1,959,206	1,446,462 <u>2/</u>
November	1,936,427	1,212,229 <u>2/</u>
December	1,727,899	845,172 <u>2/</u>
January	1,468,422	834,741 <u>2/</u>
February	1,462,175	684,917 <u>2/</u>
March	1,715,683	802,676 <u>2/</u>
April	1,586,961	871,271
May	1,569,841	918,834
June	1,665,566	681,763
Total - 11 months ...	18,886,349	10,056,875
Same Period 1947-48	22,372,427	12,945,098

1/ Based on Customs returns.

2/ Exports for months of August 1948 to March 1949 revised to remove effect of time lag in the returns made by Customs. Subsequent months to be revised as data become available.

THE UNITED STATES WHEAT SITUATION

Wheat Acreage Allotments for 1949-50 - A wheat acreage allotment programme designed to reduce plantings for next year's crop by 17 per cent was announced on July 14 by Charles F. Brannan, Secretary of Agriculture. Acreage allotments for the 1950 wheat crop have been set at 68.9 million acres which, on the basis of national average yields, would provide an outturn of 1,110 million bushels.

Mr. Brannan also announced the abandonment of earlier plans to invoke marketing quotas, a procedure which would have been subject to a referendum vote of wheat producers. This decision resulted from the reduction in wheat crop prospects in the July 11 crop report of the United States Department of Agriculture. The July wheat crop estimate for 1949 plus the carryover did not reach the total of 1,485 million bushels which would have required the proclamation of marketing quotas under the Agricultural Adjustment Agency Act of 1938.

State acreage allotments for the 1950 crop of wheat were announced on July 14 and are given in the table below. The breakdown of the national allotment by States, in accordance with the provisions of controlling legislation, is based primarily upon the seeded wheat acreage in each State during the past ten years, adjusted for recent production trends. The State allotments will in turn be broken down by each State into county allotments, which are then divided into individual farm allotments.

State Acreage Allotments for the 1950 Wheat Crop

State	Allotment	State	Allotment
	acres		acres
Alabama	15,769	Nebraska	3,899,835
Arizona	29,459	Nevada	19,036
Arkansas	45,518	New Hampshire	-
California	741,563	New Jersey	84,646
Colorado	2,272,535	New Mexico	520,302
Connecticut	-	New York	322,056
Delaware	71,122	North Carolina	442,407
Florida	-	North Dakota	9,495,166
Georgia	204,755	Ohio	2,001,444
Idaho	1,203,947	Oklahoma	6,015,842
Illinois	1,608,743	Oregon	944,891
Indiana	1,548,969	Pennsylvania	893,358
Iowa	280,023	Rhode Island	-
Kansas	13,492,502	South Carolina	218,010
Kentucky	406,177	South Dakota	3,523,342
Louisiana	140	Tennessee	348,592
Maine	2,479	Texas	5,909,134
Maryland	383,257	Utah	318,470
Massachusetts	-	Vermont	-
Michigan	995,426	Virginia	502,092
Minnesota	1,345,108	Washington	2,496,069
Mississippi	17,532	West Virginia	102,921
Missouri	1,558,826	Wisconsin	100,295
Montana	4,265,806	Wyoming	296,535
		Total Allotment	68,944,099

1949 Wheat Crop Estimate Reduced - According to a report released by the Bureau of Agricultural Economics on July 11, production of all wheat is estimated at 1,189 million bushels, 8 per cent less than the 1,288 million bushels produced last year but about 20 per cent more than the average of 992 million bushels. This is 13 per cent less than the record 1947 crop but is larger than for any year prior to 1947, and the third largest of record.

Indicated production is 148 million bushels below June 1 prospects. Extensive losses since June 1 occurred in most of the important wheat States as the result of excessive wet weather at harvest time in the southern Great Plains States of Kansas, Oklahoma, and Texas, and by prolonged drought conditions in the Northern Great Plains and Pacific Northwest States. Conditions were more favourable in the East North Central States but the season was generally too wet for good yields in the South Atlantic States.

The acreage of all wheat for harvest in 1949, estimated at 75,481,000 acres, is 5 per cent above the 71,904,000 acres harvested in 1948, 26 per cent above the average of 59,854,000 acres, and exceeds the previous record of 74,389,000 acres harvested in 1947 by 1.5 per cent. The total acreage of all wheat planted is estimated at 83,173,000 acres, exceeding by 6 per cent the previous record of 78,169,000 acres planted for the 1947 crop. Generally good weather conditions at planting time in most of the States west of the Mississippi River, together with favourable economic factors, encouraged farmers to plant a large acreage of wheat. Of these States all except Arkansas, New Mexico, and Utah seeded larger acreages of wheat than last year while in the States east of the Mississippi wet weather last fall interfered with seeding of winter wheat and only Illinois and North Carolina show increases in wheat acreage.

Unfavourable weather conditions during June in all but the East North Central States increased abandonment and reduced yields. Abandonment of all wheat acreage is now expected to be 9.2 per cent of the total acreage seeded for the 1949 crop compared with 7.5 per cent last year and the 1938-47 average of 9.4 per cent.

Stocks of Wheat at July 1, 1949 - Carryover stocks of wheat in all positions on July 1, 1949, were about 293 million bushels according to the Bureau of Agricultural Economics. Current wheat stocks are about 50 per cent larger than on July 1, 1948 and about 3 times as large as the very small carryover stocks in 1946 and 1947. They are, however, less than half of the peak carryovers of 631 million bushels in 1942 and 619 million in 1943. In the 1930-34 period, carryover stocks ranged from 273 to 378 million bushels. From the supply of 1,484 million bushels on July 1, 1948, disappearance computes to 1,191 million bushels. This disappearance was exceeded in the 1947-48 season and by the record amount of 1,287 million bushels in the 1945-46 season; is approached in 3 other recent seasons, but tops by a wide margin any marketing season before 1943.

Stocks of Wheat, July 1, 1949, with Comparisons

Position	July 1 1946	July 1 1947	July 1 1948	April 1 1949	July 1 1949
On Farms <u>1/</u>	41,606	40,477	94,511	239,315	65,598
Commodity Credit Corp. <u>2/</u>	7,351	500	2,530	3,376	3,797
Terminals <u>3/</u>	29,917	8,129	34,065	124,656	128,158
Merchant Mills <u>1/ 4/</u>	12,838	24,591	34,240	63,229	30,600
Int. Mills, Elev. & Whses <u>1/ 5/</u>	8,376	10,116	30,645	128,287	65,119
T o t a l	100,088	83,813	195,991	578,863	293,272

1/ Estimates of the Crop Reporting Board. 2/ Owned by CCC, in transit

3/ Commercial stocks reported by the Grain Branch, P.M.A., at 43 terminal cities.

4/ Mills reporting to the Bureau of the Census on millings and stocks of flour.

5/ All off-farm storages not otherwise designated for each grain.

1949 Crop Wheat Support Prices Announced - The U.S. Department of Agriculture announced on July 5 that wheat support prices will range from \$2.16 to \$2.38 a bushel for 1949 crop No. 1 wheat stored in eligible warehouses at specified terminal markets. Officials stated that the terminal rates make appropriate allowance for increases in freight rates during the past year, as well as for increases in handling charges permitted under the currently applicable Uniform Warehouse Agreement. No change is made, however, in the national average of price support on farms, which is \$1.95 a bushel for the 1949 wheat crop to reflect 90 per cent of parity, as required by applicable legislative provisions. The Department also announced that a schedule of premiums and discounts for the various qualities of the 1949-crop wheat, differing slightly from those in effect for the 1948 crop, would be issued at an early date.

Wheat loan rates for 1949-crop No. 1 wheat stored in eligible warehouses at representative terminal markets are as follows: Seattle \$2.16, Kansas City \$2.21, Chicago \$2.26, Omaha \$2.21, San Francisco \$2.21, Minneapolis \$2.23, Buffalo \$2.31, Galveston \$2.31, Albany \$2.38.

1948-49 Grain Exports Set New Record - All previous records of United States grain exports were broken during the 1948-49 shipping season ended June 30, 1949, the Production and Marketing Administration, U. S. Department of Agriculture, announced on July 20.

The total for the 12 months, July 1948-June 1949 is estimated in a preliminary report at a record 17,692,000 long tons (686,074,000 bushels), as compared with the 15,240,000 tons (588,000,000 bushels) in 1947-48.

July 1948-June 1949 exports included 13,408,000 long tons (500,521,000 bushels) of wheat, wheat flour, and macaroni products, and 4,284,000 long tons (185,553,000 bushels) of other grains and grain products. Exports during the same period of 1947-48 included 13,018,000 long tons (485,957,000 bushels) of wheat, flour and macaroni products, and 2,223,000 long tons (102,148,000 bushels) of other grains and grain products.

Flour Production - Wheat flour production in May was estimated at 17.2 million sacks by the Bureau of the Census, Department of Commerce. May production was slightly above April, but was 24 per cent less than the 22.7 million sacks produced in May last year. Flour mills operated at an average of 60.1 per cent of capacity during May.

Wheat grindings in May were estimated at 39.6 million bushels, compared with 39.2 million in April; wheat offal production was placed at 334.4 thousand tons, about 4 thousand more than in April.

During the first 11 months of the current crop year (July 1 - June 30) wheat flour production amounted to 238.5 million sacks, compared with 260.8 million sacks for the corresponding months of the 1947-1948 crop year, a decrease of 9 per cent.

These figures are based on reports received from 425 mills which report monthly to the Bureau, adjusted to represent the output of 1,100 mills which report annually. The 425 mills account for about 96 per cent of the entire United States wheat flour production, and the 1,100 mills are believed to account for about 98 per cent.

Chicago and Minneapolis Cash Wheat - In contrast to the past few months, the Chicago cash wheat market was quite active during the June 25 - July 23 period as new crop wheat began to arrive in volume. Receipts during the first three weeks of July amounted to 8,013 carloads but, despite the heavy offerings, prices were fairly well maintained. Both millers and the Commodity Credit Corporation were active in the market, the latter purchasing 5,754,000 bushels in the Chicago market in the first three weeks of the new crop year.

Movement of old-crop wheat to the Minneapolis market tapered off during the period under review with a large share of the receipts going to the CCC under previous commitments. Daily open market offerings were well taken although there was some falling off in price toward the end of the period when new-crop winter wheat began to arrive. The CCC has not been active in the Minneapolis market, the bulk of its purchases of 6.2 million bushels from July 1 - 22 having been made in Chicago.

Daily Cash Wheat Prices on the Chicago and Minneapolis Markets

1949	Chicago		Minneapolis	
	Grade	Price	Grade	Price
June 25	1 Yellow Hard	199 1/4	1 Dark Northern	222 1/2 - 227 1/2
27	1 Yellow Hard	192	1 Dark Northern	221 5/8 - 226 5/8
28	2 Red	193 3/4	1 Dark Northern	221 1/4 - 226 1/4
29	None		1 Dark Northern	223 5/8 - 228 5/8
30	1 Hard	195 1/4 - 196	1 Dark Northern	223 7/8 - 228 7/8
July 1	1 Hard	195 1/4 - 196	1 Dark Northern	224 - 229
2	1 Hard	193	1 Dark Northern	223 1/2 - 228 1/2
4	Independence Day			
5	1 Red	192 1/2 - 3/4	1 Dark Northern	225 3/4 - 229 3/4
6	1 Red	194 1/2 - 196	1 Dark Northern	234 7/8 - 235 7/8
7	2 Red	198	1 Dark Northern	234 3/4 - 235 3/4
8	1 Red	198 1/4	1 Dark Northern	232 3/4 - 233 3/4
9	2 Red	195 - 196	1 Dark Northern	232 1/2 - 233 1/2
11	1 Hard	199	1 Dark Northern	232 1/2 - 233 1/2
12	None		1 Dark Northern	232 1/4
13	2 Red	195 - 198	1 Dark Northern	230 7/8
14	2 Red	196 1/2 - 3/4	1 Dark Northern	227 5/8
15	2 Red	194 3/4	1 Dark Northern	228 5/8
16	2 Red	193 1/2 - 194	1 Dark Northern	229 3/8
18	2 Red	193 - 194 3/4	1 Dark Northern	225 7/8
19	3 Red	191	1 Dark Northern	229 1/2
20	2 Red	195	1 Dark Northern	226 - 231
21	3 Red	190 3/4 - 192 1/2	1 Dark Northern	221 7/8 - 226 7/8
22	2 Red	194 - 196	1 Dark Northern	220 1/2 - 226 1/2
23	3 Red	191 1/2 - 195 3/4	1 Dark Northern	223 3/8 - 230 3/8

Chicago Wheat Futures - The wheat futures market at Chicago was generally active but unsettled during the period June 27 to July 26. Uncertainty about new-crop prospects early in July contributed to a somewhat firmer tone with the result that futures rose to the highest levels since February. While the government's July estimate of the 1949 wheat crop was lower than had been previously forecast, the report was generally better than had been expected. The winter wheat estimate had not been reduced as much as had been anticipated, but spring wheat indications were somewhat below trade expectations.

Despite the lower production estimate, wheat continues to be in a bearish position from a purely statistical standpoint. Although the combined carry-over and prospective new-crop supplies were not sufficient to call for marketing quotas, the Department of Agriculture announced the introduction of acreage allotments for 1950. Unfavourable crop news from the North-West and Canada in the latter part of the period added strength to the deferred deliveries but the expiring July futures were influenced by the comparatively heavy spot offerings.

Chicago Wheat Futures, High Points of Closing

1949	July	September	December	March	May
- cents and eighths per bushel -					
June 27	196/1	197/6	200/2	197/6	
28	195/4	197	199/4	196/5	194
29	196/3	198/1	200/1	197/1	194
30	195/4	197/5	199/6	196	192/6
July 1	195/6	198	200	197/3	193/1
2	194/1	196/7	198/4	196/4	191/7
4		I n d e p e n d e n c e D a y			
5	195/5	198/4	201	198/6	194/2
6	201/3	203/4	205/2	203/4	198/6
7	202/2	205/4	206/3	204/4	199/7
8	201/3	204/2	205	202/2	197/7
9	200/5	203/1	204/6	202	197/1
11	202/4	205/2	206/6	204/6	199/4
12	200/5	203/4	205/2	202/6	197/6
13	200/3	202/6	204/5	202	197/2
14	199/1	202	203/7	201/3	196/3
15	197/3	200	202/1	200	195/4
16	198/3	201/2	203/6	201/6	197/6
18	198/4	201/4	204	203/1	198/5
19	199	202/7	205/3	204/2	200
20	200/4	204/2	206/4	205/3	201/3
21	199/2	202/5	205/2	204/4	200/1
22	200/2	203/6	205/7	205/2	201/2
23		205/6	208	206/4	202
25		206/6	209	207/6	203
26		203/7	207/2	205/7	201/3

THE ARGENTINE WHEAT SITUATION

The following review of the grain situation in the Argentine has been extracted from a report forwarded on July 18, 1949 by Mr. W. B. McCullough, Commercial Secretary (Agriculture) at Buenos Aires and is reproduced herewith by kind permission of the Trade Commissioner Service.

Note - Where possible, conversions to Canadian measures have been made for the convenience of Canadian readers. (Pesos converted to dollars at the rate of one peso equals \$0.2977).

Weather and Crops - Climatic conditions over the past month have varied widely but, on the whole, have been favourable for ploughing and seeding. Temperatures have been above normal. There have been stretches of excessive humidity and of cloudy weather without much actual rain, and a fair amount of soil moisture is assured in most of the grain zones except in the south where conditions are still precarious.

In southwestern Buenos Aires Province, La Pampa and southern Cordoba the drought in evidence earlier has become more marked; it has retarded ploughing and damaged fields already seeded. A report from the Territory of La Pampa states that the prolonged drought has seriously delayed ploughing and it is consequently expected that the area seeded to grains will be reduced. Pastures are extremely short and cattle have been shipped to the Provinces of Buenos Aires and Cordoba where grass is more plentiful. Frost at the end of June accentuated this condition. Milk production has also declined and supply in the towns is very irregular. While La Pampa is not the most important wheat region, it borders the southern grain zone and, being a marginal area, it is a factor in determining the size of Argentine production.

Other parts of the southern grain zone stretching north from Bahia Blanca have also been detrimentally affected by the lack of rainfall. Ploughing and seeding have been held up, and, unless conditions improve shortly, acreages may be on a lower level than last year. It will be recalled that this zone supplied the bulk of Argentine wheat production last season due to the severe drought in the north, and it would appear as if the situation might be the reverse this year. Moisture conditions along the coast from Bahia Blanca towards Necochea are reported to be satisfactory.

From the northern grain zone come reports of favourable conditions for ploughing and seeding of wheat. During the first two weeks of July, rainfall was scattered but not heavy, although in a few sectors of Entre Rios and northern Buenos Aires Province heavy rain held up operations. Seeding is now generalized, and is finished in most areas in the north. The plants which have appeared in the early-sown fields are in good condition.

Anglo-Argentine Commercial Agreement - On June 27th, the governments of Argentina and the United Kingdom signed a new commercial agreement, which came into effect on July 1st and is of five years duration. While this agreement is very comprehensive in scope in its attempt to facilitate trade between the two countries and while meat is the main commodity, mention is, nevertheless, made of substantial quantities of grains and by-products. During the first year, the Argentine government agrees to sell to the United Kingdom grains in the following value of pounds sterling: corn 20,000,000; barley, oats and other grains 3,000,000; oilcakes and meals 10,000,000; linseed oil 10,000,000 and wheat offals 2,000,000. The contracting parties will consult before March 1st of each year in order to determine the schedules for the following year.

Grain prices will be established on the international level. It is understood that actual purchases will be made in quantities, determined by the prices ruling at the time offers are requested, and already there is reported the sale of 100,000 metric tons of oilseed by-products to the United Kingdom under the terms of the new contract. Argentine wheat, for which Great Britain was once the best market, is not specifically mentioned in the agreement, but it is provided that other commodities may subsequently be added to the schedule of exports.

It has been agreed that should Argentina change their policy and permit the export of linseed uncrushed, the United Kingdom may purchase a quantity bearing the same relation to its total oil and seed purchases as the proportion between Argentina's total exports of these commodities, up to a maximum of 30 per cent of the total British seed and oil purchases from Argentina.

Commercial Agreement with Western Germany - The Argentine government has recently made public the terms of a commercial and payments agreement with Occupied Germany which will be in force until March 31, 1950. During the term of the agreement, Argentina agrees to ship, among other items, \$200,000 worth of corn meal, \$5,000,000 worth of bread grains and \$5,000,000 worth of coarse grains including corn and oilcakes (U.S. currency).

Grain Sales

Malta - a recent government decree, as reported in the press on June 28, authorizes IAPI to deliver up to 3,674,000 bushels of wheat to Malta at a maximum price of 1.95 freely convertible dollars per bushel. The decree states that while this price is somewhat lower than that customarily quoted by Argentina, the wheat is destined for an organization of a charitable nature; it is also noted that payment will be effected in dollars.

Spain - IAPI has announced the sale of 3,674,000 bushels of wheat to Spain; no mention of price is made but payment would be made under the terms of the recent financial agreement between Argentina and Spain.

Germany - 2,362,000 bushels of new crop rye have been sold to Germany at a reported \$1.44 per bushel f.o.b.

France - IAPI has announced the sale of 918,000 bushels of barley to France, thus reducing stocks to about 4,593,000 bushels.

Brazil - it is reported that the central banks of Argentina and Brazil have finalized credit arrangements covering the recent sale of 22,046,000 bushels of Argentine wheat to Brazil and that the first shipment of 367,000 bushels went forward in early July to Porto Alegre for consumption in the state of Rio Grande del Sur.

Various countries are reported to be negotiating for corn, among them, Czechoslovakia, the Netherlands and Belgium. It is said that stocks of exportable corn from the old crop are about exhausted and some months will transpire before the new crop has been conditioned.

Grain Exports

Grain shipments during the second quarter of 1949 were on an even lower level than registered during the first quarter, as is shown in the following

table, although it is expected that with the recent sales, clearances should rise in the succeeding months:

	Wheat	Corn
	- thousands of bushels -	
1948: first quarter	31,121	36,385
second quarter	26,674	12,961
third quarter	8,245	19,827
fourth quarter	12,264	33,772
1949: first quarter	22,575	13,760
second quarter	17,421	5,809

Exports by destination for the first six months of 1949, according to another trade source, are as follows:

Country	Wheat	Corn	Oats	Barley	Wheat Flour ^{1/}
	- thousands of bushels -				barrels
United Kingdom	-	4,583	-	-	-
France	-	88	-	-	-
Belgium	29	5,594	1,575	1,277	-
Italy	16,585	2,270	50	-	1,856
Netherlands	-	2,106	97	1,149	-
Norway	-	-	324	-	-
Sweden	-	1,398	753	267	-
Spain	9,210	427	-	-	-
Switzerland	-	20	867	-	337
Rest of Europe	-	405	94	713	-
Brazil	6,474	-	-	32	-
Other S.A. Reps.	1,474	59	669	-	-
Others	5,123	2,868	-	2,002	11,439
6 months 1949	38,895	19,818	4,429	5,439	13,632
6 months 1948	59,810	47,296	5,028	22,628	24,228

^{1/} For convenience of Canadian readers export shipments of flour have been converted from metric tons to barrels of 196 pounds.

THE AUSTRALIAN WHEAT SITUATION

Australian Cable - The following cable, dated July 15, 1949 was received from the Canadian Trade Commissioner in Melbourne:

"Australian wheat stocks at July 9th totalled 87 million bushels. Exports of wheat from May 29th to June 25th totalled 7,036,000 bushels, principally to the United Kingdom, India and Egypt and flour 46,815 long tons of which 17,863 went to India, 9,247 to Ceylon and 6,600 to the United Kingdom. New crop prospects are very promising in all states except perhaps in Western Australia where dry conditions have prevailed. It is estimated that the acreage sown this year will equal if not exceed last year's."

Sales of Australian Wheat - According to the "Australian News", issued by the Office of the Australian High Commissioner, Ottawa, the Australian Wheat Board, which controls the sale of wheat for export from Australia, has entered into contracts for overseas sales of almost 106,000,000 bushels of wheat. Major contracts signed are:-

With the United Kingdom Ministry of Food - 60,000,000 bushels, of which 35,000,000 bushels will be shipped as grain, and 25,000,000 bushels (equivalent to 475,000 tons) as flour. This wheat and flour will be sent not only to the United Kingdom but to other territories where Britain has accepted responsibility for the supply of wheat. These include Hong Kong, Malaya, Ceylon, Mauritius and some parts of the Middle East.

Prices are lower than those paid by the United Kingdom last year, when the price of 17/- a bushel was fixed on an 80,000,000 bushel contract. Under the new contract, wheat shipped to the United Kingdom up to March 31, 1949, brought 13/8 a bushel Australian currency f.o.b.; shipments from April 1 to July 31, 1949, realised 12/10 $\frac{1}{2}$ a bushel Australian currency f.o.b. The price for shipments after August 1, 1949, has yet to be decided. Britain will pay a little more for the wheat she buys for re-export to other countries. An extra price of 4 $\frac{1}{2}$ pence a bushel will be paid on wheat shipped from Australia to the Middle East and Persian Gulf areas, excluding Egypt, and an extra 1/- a bushel on wheat shipped to other areas.

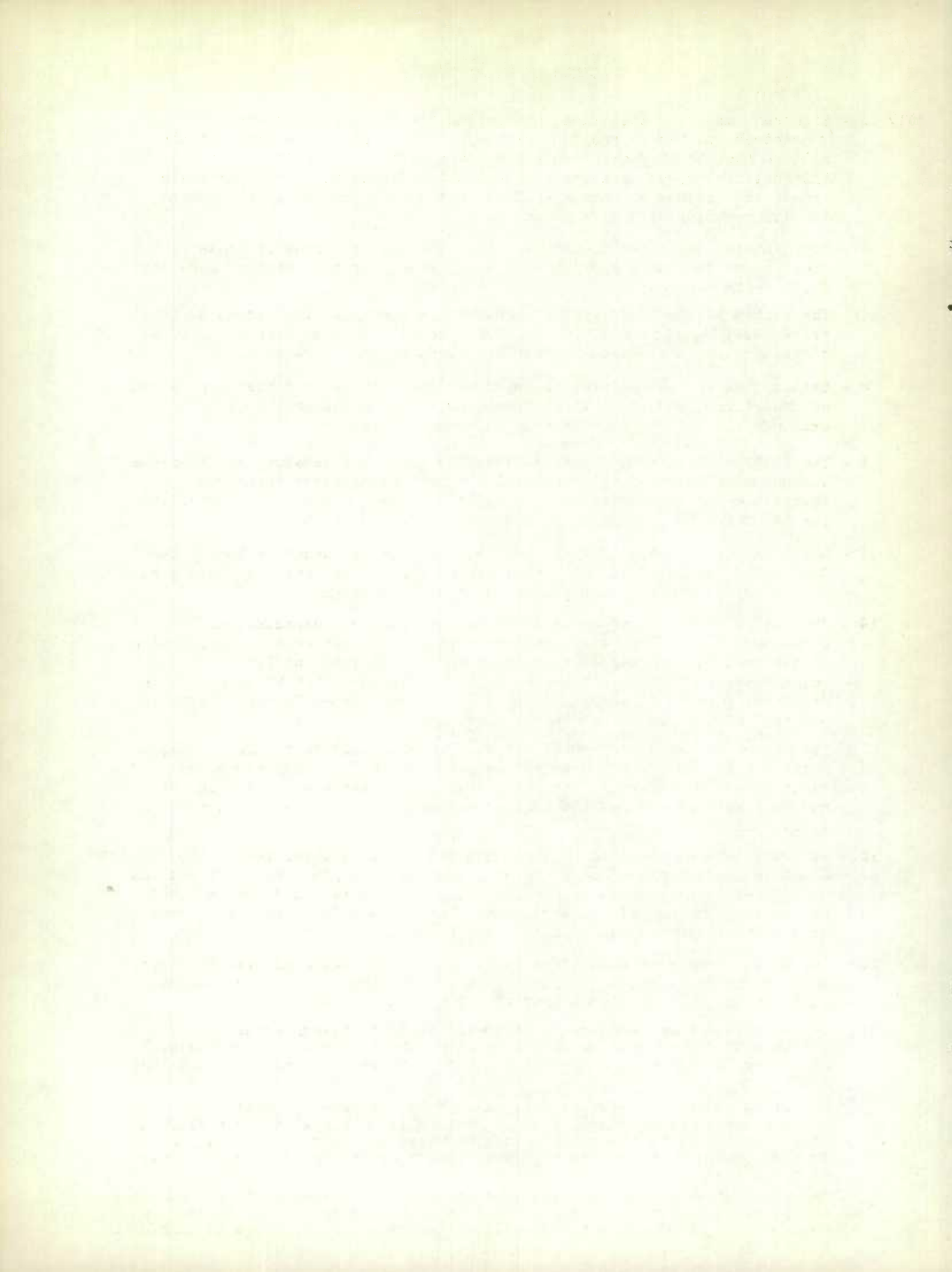
With the Indian Government: 25,250,000 bushels of wheat as grain, and 7,250,000 bushels of wheat equivalent as flour (50,000 tons). The purchase price is 14/8 a bushel, Australian currency f.o.b. Last year India paid 18/6 a bushel for 28,000,000 bushels.

With the New Zealand Government - 2,500,000 bushels of wheat at 15/- a bushel, Australian currency f.o.b. Shipment of this quantity will be made between June and December, 1949. Previously, New Zealand was buying Australian wheat on a long term contract, at prices which graduated from 9/6 to 6/9 a bushel.

Editor's Note: The Australian pound is nominally quoted at £1 = \$3.224

CALENDAR OF WHEAT EVENTS

- July 1 - Eighteen importing countries, accounting for 346 million bushels of guaranteed purchases, and four exporting countries, accounting for 454 million bushels of guaranteed sales, have officially ratified the International Wheat Agreement. Quantities of both sales and purchases exceed the minimum amounts specified in the agreement as a requirement for its becoming effective August 1.
- 5 - The Canadian Wheat Board announced that the average price of Class II Wheat under the Board's price of Class I wheat for the month of June was 2 1/2 cents per bushel.
- The United States Department of Agriculture announced that wheat support prices will range from \$2.16 to \$2.38 a bushel for 1949 crop No. 1 wheat stored in eligible warehouses at specified terminal markets.
- 8 - Britain has agreed to import some 33 million bushels of coarse grains and an undisclosed amount of wheat from Russia during the next year in exchange for industrial machinery and other equipment.
- 9 - The International Wheat Council adjourned its first session, to reconvene in London in November. The council elected an executive committee comprising Canada, Australia, the United States, Belgium, the Netherlands, Luxembourg, Egypt, India, Italy, South Africa and the United Kingdom.
- 11 - Based on conditions at July 1, the 1949 crop of all wheat in the United States was estimated at 1,189 million bushels, 8 per cent less than last year's production but about 20 per cent above average.
- 14 - The condition of spring wheat in Canada, at June 30, expressed as a percentage of the long-time average yield, was 72 per cent, compared with 95 per cent and 125 per cent on the same date in 1948 and 1947, respectively. Condition figures for spring wheat in the Prairie Provinces were as follows: Manitoba 108, Saskatchewan 70 and Alberta 61 per cent of the long-time average yield.
- The United States Secretary of Agriculture announced that acreage allotments for the 1950 wheat crop had been set at 68.9 million acres, a reduction of 17 per cent from the current wheat acreage. Based on national average yields, the 1950 acreage would provide an outturn of 1,110 million bushels.
- 15 - In order to meet domestic requirements and overseas commitments, the Canadian Wheat Board appealed to wheat producers in the Prairie Provinces to deliver as much wheat as possible during the latter part of July and continuing into August. A particularly acute need for wheat deliveries exists in delivery areas tributary to Churchill.
- 20 - During the crop year ended June 30, 1949, United States exports of wheat, wheat flour and macaroni products totalled 500,521,000 bushels compared with 485,957,000 bushels in 1947-48.
- 21 - Canada's 1949 wheat acreage is estimated at 27.5 million acres, an increase of 14 per cent over that of 1948. Wheat acreage in the Prairie Provinces is placed at 26.5 million acres compared with 23.0 million last year.
- 22 - Effective August 1, 1949 the fees charged by the Board of Grain Commissioners for the inspection of grain will be increased from \$1.00 to \$2.00 per car for grain sampled and inspected in railway car lots, and from \$1.00 to \$2.00 per thousand bushels for grain inspected on delivery from terminal elevators.
- 25 - Carryover stocks of United States wheat in all positions at July 1 amounted to 293 million bushels, about 50 per cent larger than on July 1, 1948. Farm-held wheat stocks totalled 65.6 million bushels, 31 per cent less than a year ago.



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