

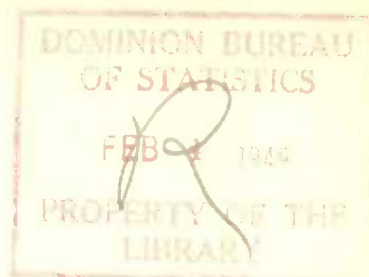
22-005  
1949  
Jan.  
c. 1

DOES NOT CIRCULATE  
NE PAS PRÊTER



CANADA

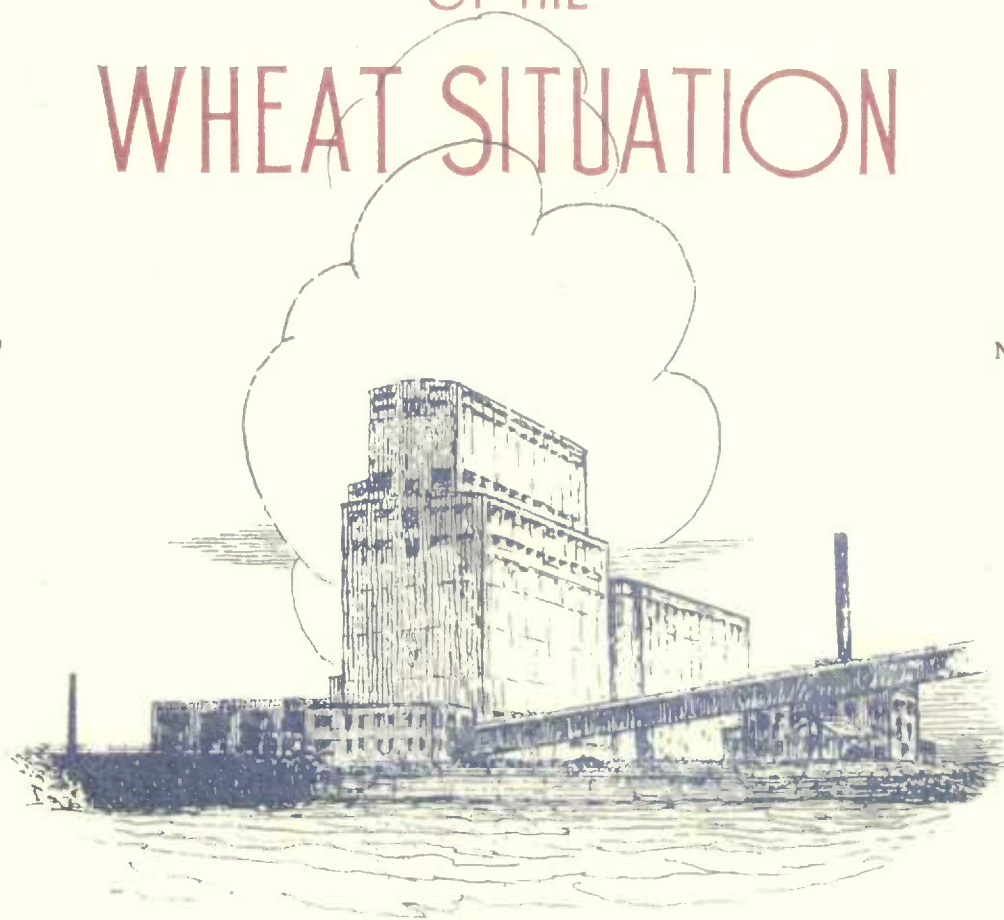
DOMINION BUREAU OF STATISTICS  
AGRICULTURE DIVISION



# MONTHLY REVIEW OF THE WHEAT SITUATION

Vol. 19

No. 6



JANUARY, 1949

Published by Authority of the Rt. Hon. C.D. Howe, M.P.  
Minister of Trade and Commerce  
Ottawa

Price \$1 a year



# MONTHLY REVIEW OF THE WHEAT SITUATION

JANUARY 1949

	Page
World Wheat Situation .....	1
Canadian Wheat Situation -	
1949-50 Wheat Price to the United Kingdom .....	2
Supply Position .....	3
Farmers' Marketings .....	4
Visible Supply of Canadian Wheat .....	5
Grading of Wheat, August-December Inspections .....	5
Weekly Visible Supply and Farmers' Marketings (Charts) .....	6
Shipments to the United States .....	7
Rail Movement of Wheat to Maritime Ports .....	7
Rail Movement from Fort William-Port Arthur .....	8
Freight Assistance Shipments .....	9
Monthly Export Clearances .....	10
Overseas Clearances of Canadian Wheat and Flour by Destination .....	11
Current Wheat Prices .....	13
Canadian Grain Storage .....	14
Canadian Flour Milling Situation -	
Production and Exports .....	20
Ontario Winter Wheat Millings .....	21
United States Wheat Situation -	
Wheat Stocks on Farms .....	21
Chicago and Minneapolis Cash Wheat .....	23
Chicago Wheat Futures .....	24
Argentine Wheat Situation .....	25
Australian Wheat Situation .....	26
New Zealand Wheat Situation .....	29
Calendar of Wheat Events .....	31

---

1911

Page

1	Report of the President
2	Report of the Secretary
3	Report of the Treasurer
4	Report of the Committee on Finance
5	Report of the Committee on Education
6	Report of the Committee on Extension
7	Report of the Committee on Publications
8	Report of the Committee on Student Body
9	Report of the Committee on Faculty
10	Report of the Committee on Physical Plant
11	Report of the Committee on Social Service
12	Report of the Committee on Alumni
13	Report of the Committee on General Administration
14	Report of the Committee on Special Projects
15	Report of the Committee on Unfinished Business
16	Report of the Committee on Resolutions
17	Report of the Committee on Nominations
18	Report of the Committee on Credentials
19	Report of the Committee on Adjournment
20	Report of the Committee on Unfinished Business
21	Report of the Committee on Resolutions
22	Report of the Committee on Nominations
23	Report of the Committee on Credentials
24	Report of the Committee on Adjournment
25	Report of the Committee on Unfinished Business
26	Report of the Committee on Resolutions
27	Report of the Committee on Nominations
28	Report of the Committee on Credentials
29	Report of the Committee on Adjournment
30	Report of the Committee on Unfinished Business
31	Report of the Committee on Resolutions
32	Report of the Committee on Nominations
33	Report of the Committee on Credentials
34	Report of the Committee on Adjournment
35	Report of the Committee on Unfinished Business
36	Report of the Committee on Resolutions
37	Report of the Committee on Nominations
38	Report of the Committee on Credentials
39	Report of the Committee on Adjournment
40	Report of the Committee on Unfinished Business
41	Report of the Committee on Resolutions
42	Report of the Committee on Nominations
43	Report of the Committee on Credentials
44	Report of the Committee on Adjournment
45	Report of the Committee on Unfinished Business
46	Report of the Committee on Resolutions
47	Report of the Committee on Nominations
48	Report of the Committee on Credentials
49	Report of the Committee on Adjournment
50	Report of the Committee on Unfinished Business
51	Report of the Committee on Resolutions
52	Report of the Committee on Nominations
53	Report of the Committee on Credentials
54	Report of the Committee on Adjournment
55	Report of the Committee on Unfinished Business
56	Report of the Committee on Resolutions
57	Report of the Committee on Nominations
58	Report of the Committee on Credentials
59	Report of the Committee on Adjournment
60	Report of the Committee on Unfinished Business
61	Report of the Committee on Resolutions
62	Report of the Committee on Nominations
63	Report of the Committee on Credentials
64	Report of the Committee on Adjournment
65	Report of the Committee on Unfinished Business
66	Report of the Committee on Resolutions
67	Report of the Committee on Nominations
68	Report of the Committee on Credentials
69	Report of the Committee on Adjournment
70	Report of the Committee on Unfinished Business
71	Report of the Committee on Resolutions
72	Report of the Committee on Nominations
73	Report of the Committee on Credentials
74	Report of the Committee on Adjournment
75	Report of the Committee on Unfinished Business
76	Report of the Committee on Resolutions
77	Report of the Committee on Nominations
78	Report of the Committee on Credentials
79	Report of the Committee on Adjournment
80	Report of the Committee on Unfinished Business
81	Report of the Committee on Resolutions
82	Report of the Committee on Nominations
83	Report of the Committee on Credentials
84	Report of the Committee on Adjournment
85	Report of the Committee on Unfinished Business
86	Report of the Committee on Resolutions
87	Report of the Committee on Nominations
88	Report of the Committee on Credentials
89	Report of the Committee on Adjournment
90	Report of the Committee on Unfinished Business
91	Report of the Committee on Resolutions
92	Report of the Committee on Nominations
93	Report of the Committee on Credentials
94	Report of the Committee on Adjournment
95	Report of the Committee on Unfinished Business
96	Report of the Committee on Resolutions
97	Report of the Committee on Nominations
98	Report of the Committee on Credentials
99	Report of the Committee on Adjournment
100	Report of the Committee on Unfinished Business



DOMINION BUREAU OF STATISTICS  
AGRICULTURE DIVISION  
OTTAWA, CANADA

Published by Authority of the Rt. Hon. C. D. Howe, M.P.,  
Minister of Trade and Commerce

---

Dominion Statistician: Herbert Marshall  
Director, Agriculture Division: C. V. Parker  
Chief, Crops Section: W. D. Porter

---

WORLD WHEAT SITUATION

Supplies and Requirements - Following generally satisfactory 1948 grain harvests in the world's major producing areas, world supplies and requirements of both breadgrains and coarse grains for the first time since the war have been brought into reasonable balance—a balance that is associated with substantial improvement in the food and feed situation in most countries. This conclusion is reached by the Office of Foreign Agricultural Relations of the United States Department of Agriculture in a report on the World Food Situation for 1949 released on January 12. The report states that the increased production of wheat and rye has eliminated bread rationing in some countries while in others the ration has been increased, quality improved and the rigid controls of the previous year relaxed somewhat. The increased production of corn, oats and barley will provide the feed grains needed to make significant progress during the year in restoring the live-stock industry and increasing production of live-stock products in many countries. The OFAR experts warn, however, that the current balance in grain supplies is a precarious one and that large areas of the world are still dependent on current production, particularly of breadgrain. In other words, additional reserves of this basic commodity are needed to maintain current and increasing levels of consumption in deficit areas and to provide a reasonable safeguard against possible set-backs such as adverse weather conditions.

Based upon present estimates of availability OFAR places world supplies of grain available for export during the 1948-49 crop year at some 39 million long tons, 27 million being wheat and rye and 12 million coarse grains. These availability estimates exceed last year's actual shipments by some 5 million tons or nearly 15 per cent and approach the record level of 1928-29 when total grain exports reached 40.6 million long tons.

Stated world import requirements for the year ending June 30, 1949 total about 31 million long tons of breadgrains and 12 million tons of coarse grains. This total may be compared with a stated requirement for the 1947-48 year of nearly 52 million tons, of which 42 million tons were breadgrains. In summarizing the situation OFAR points out that "The reduced stated requirement for 1948-49 reflects the marked recovery of grain production in the main deficit areas. It does not fully reflect the need for grain imports from the standpoint of nutrition. Whatever this need might be, however, it must of necessity be geared to world grain export availabilities. In the 1947-48 year, for example, it was obvious from the beginning that a stated import requirement of 52 million tons could not possibly be met. Taking into account the ability to finance grain imports, it seems evident that this year's reduced grain import requirement is still large enough to absorb effectively the quantities likely to be available for export."

International Wheat Agreement - A press report from Washington under date of January 26 states that "Some fifty nations opened a new drive today for a world wheat pact. The goals:

1. To assure importing nations a dependable supply.
2. To give each exporting country a 'fair share' of the world market.
3. To iron out ups and downs in prices.

The multi-lingual session marked the third time since the war that such a campaign had been launched, but previous failure to push through a final agreement served to intensify the latest effort.

Secretary of Agriculture Charles F. Brannan said in a welcoming address that the record representation indicates 'the growing realization of the need for international co-operation in solving specific economic problems'.

He said the projected wheat agreement might serve as a model for later international pacts dealing with 'other problems which now haunt consumers and producers'.

The Agriculture Department Chief was unanimously elected chairman of the conference which for the first time included the world's five major wheat exporters—Argentina, Australia, Canada, Russia and the United States.

Neither Argentina nor Russia took part in last year's meeting at which 39 nations worked out a stabilization agreement.

Although the United States took a leading role in that conference, the Senate failed to ratify the treaty submitted in the closing days of last summer's special session of the 80th Congress."

#### THE CANADIAN WHEAT SITUATION

1949-50 Wheat Price Under United Kingdom-Canadian Agreement - On January 20, 1949 the Canadian Government made the following announcement in connection with the price to be paid by the United Kingdom for Canadian wheat in 1949-50:

"Representatives of the United Kingdom and Canadian Governments have had discussions on the price to be paid by the United Kingdom for Canadian wheat in 1949-50, the fourth and final year under the United Kingdom-Canadian Wheat Agreement of 1946. After taking into account all relevant considerations, including but without attempting to reach a final settlement of the United Kingdom obligations under Clause 2(b) of the agreement, the two governments have agreed upon a price of \$2.00 per bushel.

The two Governments have also agreed that their representatives shall meet not later than 31st July, 1950, to settle any obligations of the United Kingdom which may then still be outstanding under Clause 2(b) of the Agreement. The extent to which any such obligations will remain will depend largely upon the actual prices ruling for wheat during 1949-50."

Note:- For the information of our readers Clause 2(b) referred to above reads as follows "The **actual** prices to be paid for wheat to be bought



and sold within the crop year 1948-49 shall be negotiated and settled between the United Kingdom Government and the Canadian Government not later than the 31st December, 1947, and prices for wheat to be bought and sold within the crop year 1949-50 shall be negotiated and settled not later than the 31st December 1948. In determining the prices for these two crop years, 1948-49 and 1949-50, the United Kingdom Government will have regard to any difference between the prices paid under this Agreement in the 1946-47 and 1947-48 crop years and the world prices for wheat in the 1946-47 and 1947-48 crop years."

#### Supply Position -

Exports of wheat and wheat flour for the first five months of the current crop year amounted to 83.0 million bushels, an increase of 5.3 million over the similar period in 1947-48. While exports of wheat flour are lagging behind those of last year, exports of wheat as grain are 11.5 million bushels in excess of the total at December 31, 1947. The balance remaining on January 1, 1949 for export or carry-over was 236.6 million bushels compared with 192.2 million bushels on the same date last year.

#### Canadian Wheat Supplies

	1948-49	1947-48
	- million bushels -	
Carry-over in North America July 31 .....	76.0 <sup>1/</sup>	87.4
New Crop .....	393.3 <sup>2/</sup>	336.8 <sup>3/</sup>
Imports of wheat and wheat flour, Aug. 1—Nov. 30 .....	0.3	-
<b>Total Supply .....</b>	<b>469.6</b>	<b>424.2</b>
Estimated domestic requirements .....	150.0	154.3 <sup>3/</sup>
<b>Available for export or carry-over .....</b>	<b>319.6</b>	<b>269.9</b>
<b>Deduct:</b>		
Overseas clearances of wheat as grain Aug. 1—Dec. 31 .....	59.6	48.1
United States imports of Canadian wheat Aug. 1—Dec. 31 ..	4 <sup>4/</sup>	0.1
<b>Total wheat exports .....</b>	<b>59.6</b>	<b>48.2</b>
Exports of wheat flour in terms of wheat Aug. 1—Dec. 31 ..	23.4	29.5 <sup>5/</sup>
<b>Total exports wheat and wheat flour .....</b>	<b>83.0</b>	<b>77.7</b>
<b>Balance on January 1 for export or carry-over .....</b>	<b>236.6</b>	<b>192.2</b>

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

<sup>2/</sup> November estimate of production.

<sup>3/</sup> Revised estimate, basis preliminary disposition data.

<sup>4/</sup> U.S. imports August to November amount to 10,661 bushels. December 1948 data not yet available.

<sup>5/</sup> Adjusted for time-lag.

# 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	6,123,122	2,371,473	10,442,807	6,431,461
September 2	6,536,917	15,904,916	3,604,565	26,046,398	13,939,036
9	7,878,137	17,182,853	6,427,530	31,488,520	31,429,840
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	4,793,844	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	1,330,857	1,813,318	3,438,999	2,537,879
13	199,693	1,001,110	1,990,051	3,190,854	2,900,392
T o t a l	33,453,469	129,886,922	73,987,296	237,330,687	196,620,284

Farmers in the Prairie Provinces had marketed 237.3 million bushels of wheat by January 13 of the current crop year, 40.7 million bushels more than during the corresponding period of 1947-48. Peak marketings in both crop years occurred in September, with 34.5 million bushels being marketed in the week ending September 16, 1948. Since that week marketings during 1948-49 tapered off to a low point of 2.0 million bushels in the week ending December 16. Marketings, however, during each of the last four weeks under review have exceeded 3 million bushels.

Saskatchewan, with 129.9 million bushels, accounted for 54.7 per cent of wheat marketings in the Prairie Provinces up to January 13. Alberta, with 74 million bushels, and Manitoba, with 33.5 million bushels, supplied 31.2 per cent and 14.1 per cent, respectively. As in 1947 the existence of adequate country elevator space and the early removal of marketing quotas have facilitated delivery of wheat from farms.



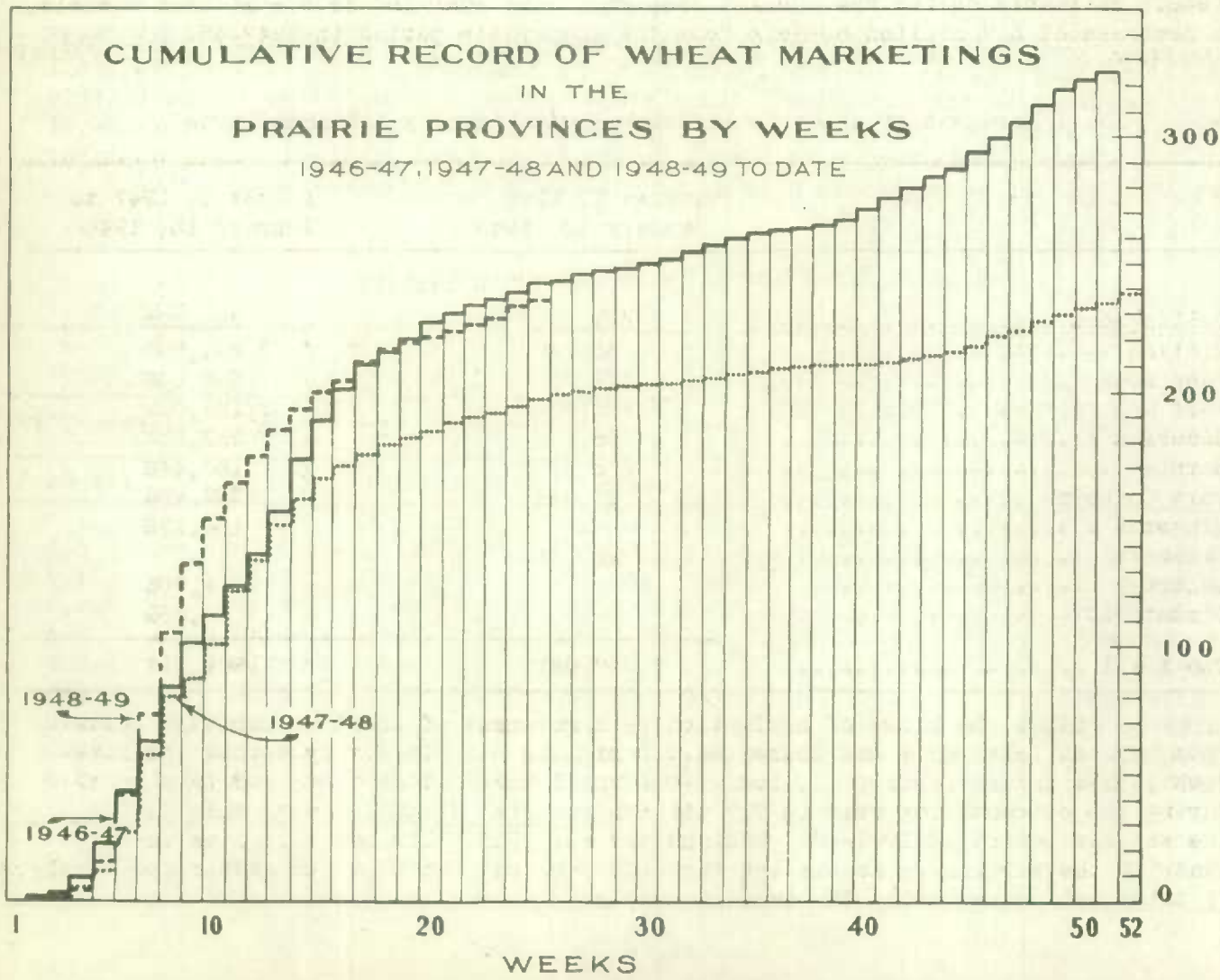
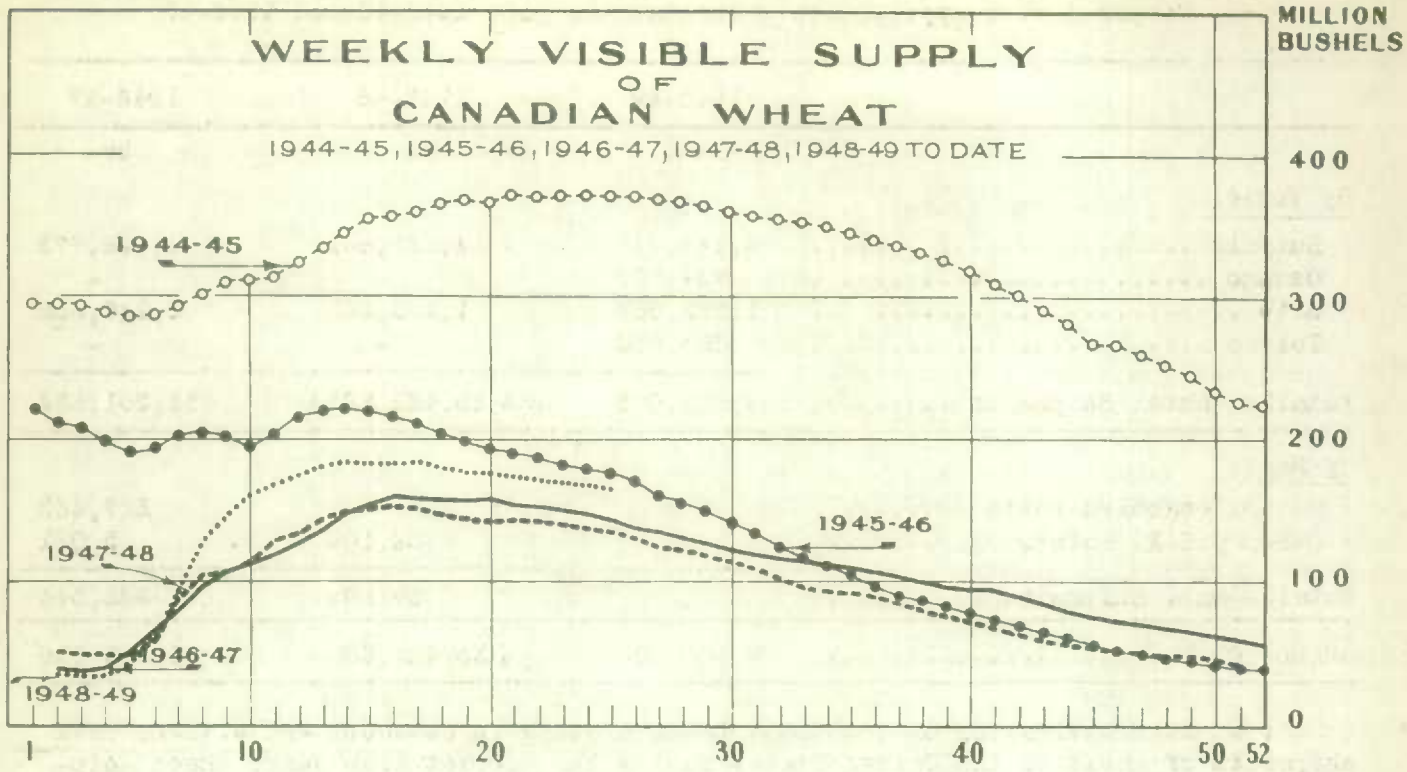
Visible Supply of Canadian Wheat, January 13, 1949 Compared With  
Approximately the Same Date, 1948 and 1947

	1949	1948	1947
	- 000 bushels -		
Country Elevators - Manitoba .....	8,945	4,724	6,010
Saskatchewan .....	46,116	33,296	37,250
Alberta .....	41,059	32,426	37,785
T o t a l .....	96,120	70,446	81,045
Interior Private and Mill Elevators .....	4,521	4,741	2,871
Interior Public & Semi-Public Terminals ...	181	183	296
Pacific Ports .....	5,053	6,179	4,079
Churchill .....	100	110	43
Fort William and Port Arthur .....	17,062	9,250	12,417
In Transit Rail (Western Division) .....	8,242	6,750	5,948
Eastern Elevators - Lake Ports .....	14,939	12,103	18,826
St. Lawrence and Seaboard Ports .....	4,817	2,869	2,077
Storage Afloat .....	8,682	7,190	8,184
In Transit - Rail (Eastern Division) .....	3,456	3,562	2,837
United States Ports .....	2,486	9,933	3,734
In Transit - U.S.A. ....	1,028	1,534	550
T o t a l .....	166,687	134,850	142,907

The visible supply of Canadian wheat at midnight January 13, 1949, was 166.7 million bushels, an increase of 31.8 million bushels over last year's total on approximately the same date. Wheat stored in country elevators in the Prairie Provinces accounted for 57.7 per cent of the total and represented an increase of 25.7 million bushels over last year's figure. Stocks at Fort William-Port Arthur, at 17.1 million bushels were also up considerably from the same date in 1948.

Grading of Wheat Inspected, August-December 1948 and 1947

	Inspections			
	August-December 1948		August-December 1947	
	Cars	Per Cent	Cars	Per Cent
1 Northern .....	24,318	29.3	5,122	6.5
2 Northern .....	35,097	42.2	26,726	34.0
3 Northern .....	6,596	7.9	15,638	20.0
4 Northern .....	1,153	1.4	2,697	3.4
Garnet .....	649	0.8	154	0.2
Amber Durum .....	5,975	7.2	3,541	4.5
Alberta Winter .....	957	1.2	621	0.8
Toughs - All varieties and grades ..	5,753	6.9	19,682	25.0
All Others .....	2,598	3.1	4,405	5.6
T o t a l .....	83,096	100.0	78,586	100.0



Wheat Shipments to the United States, By Destination, August 1, 1948-January 13, 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 .....	7,161,915	14,266,961	8,442,772
Oswego .....	737,500	-	-
Erie .....	1,575,567	1,155,260	2,948,382
Toledo .....	325,053	-	-
Total - Vessel Shipments .....	9,800,035	15,422,221	11,391,154
<u>By Rail</u>			
U.S.A. Seaboard Ports .....	-	-	217,463
Other U.S.A. Points .....	-	59,109	5,081
Total - Rail Shipments .....	-	59,109	222,544
GRAND TOTAL .....	9,800,035	15,481,330	11,613,698

With navigation on the Great Lakes closing in December and with no rail shipments of wheat to the United States during the current crop year, wheat shipments to the United States remained unchanged since the week ending December 9, 1948. Shipments during the current crop year have amounted to 9.8 million bushels, a decrease of 5.7 million bushels from the comparable period in 1947-48.

Rail Movement of Wheat to Maritime Ports from Bay and Lake Ports

	August 1, 1948 to January 13, 1949	August 1, 1947 to January 15, 1948
	- bushels -	
Collingwood .....	671,015	390,225
Midland .....	3,760,740	3,894,707
Owen Sound .....	178,720	598,198
Port McNicoll .....	2,695,480	2,129,024
Goderich .....	56,839	233,514
Sarnia .....	255,775	167,446
Port Colborne .....	27,426	339,496
Kingston .....	-	164,272
Prescott .....	11,066	-
Montreal .....	-	4,706
Toronto .....	-	68,339
Total .....	7,657,061	7,989,957

Since the close of navigation rail movement of wheat to Maritime ports from bay and lake ports has increased, 3.3 million bushels moving during the five-week period ending January 13, 1949. The total movement from bay and lake ports during the current crop year is 7.7 million bushels, slightly lower than during the similar period of 1947-48. Midland and Port McNicoll lead all ports in shipments to the Maritimes, accounting for 49.1 per cent and 35.2 per cent, respectively, of total shipments during the current crop year.



Rail Movement from Fort William-Port Arthur -      Details of monthly rail shipments of wheat from the Lakehead for the past three crop years and the distribution of the December 1948 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	91,368	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 .....		3,149,421	2,462,002	4,533,707
February .....		1,851,773	1,816,087	1,127,764
March .....		3,423,684	1,711,013	2,223,266
April .....		371,950	566,006	1,015,730
May .....		154,551	361,386	536,462
June .....		81,133	241,475	920,233
July .....		231,414	123,145	130,276
<b>T o t a l (12 months) ...</b>		<b>10,368,942</b>	<b>9,758,598</b>	<b>13,021,835</b>

Distribution of Rail Shipments of Wheat from the Lakehead,  
by Provinces and Grades, December 1948

	Ontario	Quebec	New Brunswick	Nova Scotia	Prince Edward Island
	- bushels -				
1 Northern .....	-	-	524,000	332,000	-
2 Northern .....	-	-	440,500	370,000	-
No. 5 .....	5,667	3,967	567	1,000	167
No. 6 .....	-	6,800	-	-	-
Tough No. 5 .....	5,133	13,600	-	-	-
Tough No. 6 .....	1,133	12,466	-	-	-
Tough Rejected No. 5 .....	83	-	500	-	-
Tf. Rej. No. 5 Mixed Heated ....	-	167	-	-	-
Tf. Sample Frbt. ....	-	1,440	-	-	-
1 C.W.A.D. ....	7,500	-	-	-	-
3 C.W. Soft White Spring .....	1,935	-	-	-	-
Sample C.W. Soft White Spring ..	8,281	-	-	-	-
Rej. 2 C.W. White Spr.Mxd.Htd. .	1,932	-	-	-	-
Special Bin .....	1,567	-	-	-	-
<b>T o t a l .....</b>	<b>33,231</b>	<b>38,440</b>	<b>965,567</b>	<b>703,000</b>	<b>167</b>

Freight Assistance Shipments - On the basis of preliminary claims filed for payment to November 30, wheat shipments from the Prairie Provinces to Eastern Canada and British Columbia under the Freight Assistance Plan continue to lag far behind last year's shipments. The decline in shipments is largely a result of heavier production of feed grains in 1948 in Ontario and Quebec, both of which normally require fairly substantial quantities of Western grain for feeding purposes. From the beginning of the current crop year to the end of November claims for freight assistance had been made for 3.7 million bushels of wheat, less than half the amount shipped during the comparable period of 1947-48. The filing of late claims, however, should appreciably diminish the difference at present existing between shipments during the two periods.

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	393,352	377,670	30,630	37,560	11,985	262,823	1,114,020
September	406,443	322,896	35,165	42,278	17,317	229,643	1,053,742
October	335,838	287,895	22,038	33,647	9,042	120,940	809,400
November	408,643	235,648	13,793	22,985	6,766	38,560	726,395
T o t a l	1,544,276	1,224,109	101,626	136,470	45,110	651,966	3,703,557
Same period 1947-48	3,782,006	2,941,513	291,103	332,063	105,148	1,406,765	8,858,598

Continuing the trend established earlier in the present crop year, total freight-assisted millfeed shipments during August-November have not been as great as in 1947-48. Claims filed for payment from August 1 to November 30, 1948, represent shipments of 196,124 tons, a decrease of approximately 32 per cent from last year's shipments during the same period. As with freight-assisted wheat shipments, the current year's total is subject to revision as further claims are filed for payment.

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

	August 1 to November 30, 1948	August 1 to November 30, 1947
- tons -		
Ontario .....	62,718	100,210
Quebec .....	88,613	117,313
New Brunswick .....	14,199	19,421
Nova Scotia .....	13,703	19,208
Prince Edward Island .....	3,426	4,752
British Columbia .....	13,465	25,645
T o t a l .....	196,124	286,549

Monthly Export 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 <sup>2/</sup> Exports of Canadian Wheat Flour	Total	Customs <sup>3/</sup> 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
T o t a l	161,716	1,672	76,033	239,421	239,807
<u>1947-48 <sup>4/</sup></u>					
August	9,601	2	7,048	16,651	18,140
September	9,362	12	5,864	15,238	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	10,081	3	5,783	15,867	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
T o t a l	133,372	133	61,477	194,982	199,475
<u>1948-49 <sup>4/</sup></u>					
August	9,111	1	4,244	13,356	13,829
September	10,555	3	3,670	14,228	11,942
October	11,566	1	5,851	17,418	21,913
November	15,604	6	4,989	20,599	20,792
December	12,744	<u>5/</u>	4,624	17,368	18,205
T o t a l	59,580	11	23,378	82,969	86,681

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

<sup>2/</sup> Exports for months of August 1946 to September 1948 revised to remove effect of time-lag in the returns made by Customs. Subsequent months to be revised as data become available.

<sup>3/</sup> Unadjusted, as published by External Trade Division, Dominion Bureau of Statistics.

<sup>4/</sup> Subject to revision.

<sup>5/</sup> U.S.A. imports for December not available.



Overseas Clearances and United States Imports of Canadian Wheat and Wheat Flour,  
August 1948 to December 1948 - The following statistics on monthly overseas clearances  
have been compiled by the Statistics Branch, Board of Grain Commissioners:

	November		December		August-December	
	Wheat Flour 1/	Wheat 2/	Wheat Flour 1/	Wheat 2/	Wheat Flour 1/	Wheat 2/
	- bushels -		- bushels -		- bushels -	
<b>BRITISH EMPIRE</b>						
United Kingdom ....	2,194,214	12,341,739	1,666,975	9,899,597	10,154,021	48,315,135
Eire .....	23	687,067	17,469	-	17,492	687,067
<u>Africa</u>						
Br. E. Africa ....	1,377	-	1,377	-	5,512	-
Br. S. Africa ....	118,881	93,400	-	-	226,994	909,329
<u>Br. W. Africa</u>						
Gold Coast .....	14,832	-	10,841	-	94,352	-
Nigeria .....	-	-	5,989	-	7,420	-
Sierra Leone .....	11,524	-	8,366	-	42,723	-
Other Br.W. Africa	-	-	-	-	2,065	-
<u>Asia</u>						
Aden .....	-	-	41,629	-	73,782	-
Hong Kong .....	93,263	-	163,201	-	543,731	-
India .....	-	619,733	-	1,506,499	189	2,126,232
Pakistan .....	-	-	459,144	-	459,144	-
<u>Europe</u>						
Gibraltar .....	-	-	1,075	-	1,075	-
Malta .....	-	-	-	304,659	-	897,848
<u>North America</u>						
Bahamas .....	11,741	-	28,494	-	119,138	-
Barbados .....	40,784	-	36,041	-	221,612	-
Jamaica .....	67,914	1,018	46,076	2,040	477,724	10,352
St. Vincent .....	-	-	-	6	-	6
Trinidad-Tobago ..	295,956	-	160,754	-	1,099,454	-
Leeward-Windward Is.	68,773	-	72,459	-	379,363	-
Bermuda .....	7,924	-	8,483	-	42,520	-
British Honduras ..	5,611	-	1,836	-	20,983	-
Newfoundland .....	179,294	-	233,239	17	919,310	17
<u>South America</u>						
Br. Guiana .....	94,972	-	47,592	-	372,712	-
<b>TOTAL BRITISH EMPIRE</b>	<b>3,207,083</b>	<b>13,742,957</b>	<b>3,011,040</b>	<b>11,712,818</b>	<b>15,281,316</b>	<b>52,945,986</b>

**FOREIGN COUNTRIES**

**Africa**

Azores and Madeira	-	-	3,919	-	3,919	-
Belgian Congo ....	1,737	-	20,777	-	47,669	-
Canary Island ....	-	-	2,322	-	3,699	-
Egypt .....	25,700	-	-	534,100	198,338	1,718,248
French Africa ....	-	-	22	-	18,310	-
Liberia .....	1,494	-	2,295	-	6,084	-
Morocco .....	2,066	-	25,236	-	79,875	-
Portuguese Africa.	1,035	-	-	-	2,916	-
Spanish Africa ...	-	-	-	-	3,672	-

**Asia**

China .....	2,511	-	59,706	-	93,182	-
Japan .....	274	-	-	-	274	-
Lebanon .....	-	74,667	-	373,741	-	448,408
Palestine .....	86,913	-	11,471	-	214,047	-
Philippine Is. ...	412,461	-	241,047	-	1,280,196	-

## Overseas Clearances of Canadian Wheat and Wheat Flour - concluded

	November		December		August-December	
	Wheat Flour 1/	Wheat 2/	Wheat Flour 1/	Wheat 2/	Wheat Flour 1/	Wheat 2/
	- bushels -		- bushels -		- bushels -	
<b>FOREIGN COUNTRIES</b>						
<b>Asia</b>						
Portuguese Asia ...	19,562	-	-	-	20,939	-
Siam .....	5,967	-	8,537	92	16,340	92
Syria .....	595,400	-	842,728	-	1,818,036	-
<b>Europe</b>						
Belgium .....	6,430	45,805	5,049	34,483	11,479	80,288
Denmark .....	-	-	742	-	2,272	-
Germany .....	-	-	7,889	-	78,548	-
Greece .....	13,770	-	4,590	-	19,750	-
Iceland .....	-	-	40,851	-	119,268	-
Italy .....	245,250	110,460	21,307	80,646	2,159,568	2,449,764
Netherlands .....	3,028	361,066	12,146	-	39,820	361,066
Norway .....	-	957,830	-	-	-	957,830
Portugal .....	3,672	-	-	-	61,510	-
Switzerland .....	-	301,333	8,491	-	57,123	600,000
<b>North America</b>						
Costa Rica .....	14,688	-	47,790	-	71,311	-
Cuba .....	12,852	-	33,908	-	116,802	-
French W. Indies ..	1,444	-	-	-	1,444	-
Guatemala .....	11,196	-	6,192	-	65,867	-
Haiti .....	18,239	-	37,174	-	71,136	-
Honduras .....	-	-	229	8,333	3,901	8,333
Nether. W. Indies ..	7,150	-	12,510	-	58,239	-
Nicaragua .....	2,304	-	3,717	-	8,969	-
Panama .....	2,867	-	10,985	-	22,847	-
Salvador .....	1,732	10,000	1,377	-	13,419	10,000
San Domingo .....	3,951	-	4,820	-	60,557	-
St. Pierre-Miquelon.	3,582	-	-	-	8,388	-
<b>Oceania</b>						
French Oceania ....	-	-	9	-	9	-
Guam .....	4,545	-	-	-	4,545	-
Hawaii .....	1,836	-	-	-	5,256	-
<b>United States</b>						
For human consumption	103	5,152	122	3/	2,061	10,124 <sup>4/</sup>
Unfit for human consumption .....	-	375	-	3/	-	537 <sup>4/</sup>
Alaska .....	1,328	-	1,057	-	2,520	166
Virgin Islands ....	-	-	-	-	162	-
<b>South America</b>						
Brazil .....	36,558	-	11,471	-	178,070	-
Colombia .....	1,030	-	-	-	13,275	-
Ecuador .....	7,461	-	15,511	-	35,023	-
French Guiana .....	-	-	-	-	8,388	-
Netherlands Guiana.	12,505	-	13,284	-	34,718	-
Venezuela .....	208,967	-	94,275	-	895,689	-
<b>TOTAL FOREIGN COUNTRIES</b>						
	1,781,608	1,866,688	1,613,556	1,031,395	8,039,430	6,644,856
<b>GRAND TOTAL EXPORTED.</b>						
	4,988,691	15,609,645	4,624,596	12,744,213	23,320,746	59,590,842

<sup>1/</sup> Canadian Customs Returns - conversion rate 4 1/2 wheat bushels equal 1 barrel.<sup>2/</sup> Subject to revision.<sup>3/</sup> United States imports for December not available.<sup>4/</sup> 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, basis No. 1 Northern in store Fort William-Port Arthur or Vancouver. Included in the price for both classes are carrying charges of 5 cents per bushel. There was a slight easing off in prices of Class II 'Commercial' (wheat for export to countries other than the United Kingdom) in the five-week period ending January 15, with the low for the period of \$2.34 per bushel being registered on January 8. Daily prices during the period under review, however, showed little fluctuation, with a spread of only 6 cents between the high and low points.

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

		Weeks ending				
		Dec. 18	Dec. 25	Jan. 1	Jan. 8	Jan. 15
		- 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 50 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 .....	239	238/2	239/2	237	236/5	
1 Northern .....	239	238/2	239/2	237	236/5	
2 Northern .....	236	235/2	236/2	234	233/5	
3 Northern .....	234	233/2	234/2	232	231/5	
1 C.W. Amber Durum .....	239	238/2	239/2	237	236/5	
2 C.W. Amber Durum .....	236	235/2	236/2	234	233/5	
3 C.W. Amber Durum .....	234	233/2	234/2	232	231/5	



## CANADIAN GRAIN STORAGE

Note - The editors are indebted to the Licence and Bonding Branch, Board of Grain Commissioners for Canada, for the statistical information contained in this article.

Ever since the potentialities of the Canadian Prairies as a major grain producing area have been realized the provision of adequate storage facilities for grain and particularly wheat has been an important factor in the Canadian economy. The desire on the part of many grain growers to concentrate the marketing of large quantities of their product in a comparatively short period of time following harvest, the problems involved in the transportation of millions of bushels of grain over great distances to both domestic and export markets and the necessity of protecting the grain from the rigours of the Canadian climate all contribute to the need for an elaborate system of grain storage in Canada.

In developing its method of grain handling and storage Canada has evolved what is generally considered one of the most efficient and economical systems in existence. In contrast to many other grain-producing countries, practically all of Canada's grain is handled in bulk, taking full advantage of the economies of bulk transportation and the utilization of modern mechanical loading and unloading devices at the various types of elevators. Bulk handling and storage do, however, present certain problems involving the segregation of numerous varieties and grades and, to ensure uniformity and as a protection to all parties concerned, the commercial storage of grain is subject to governmental supervision, currently exercised by the Board of Grain Commissioners for Canada. The functions of this Board with respect to the administration of the handling of grain are set forth in the Canada Grain Act of 1930 together with its subsequent amendments.

Section 15 of the Act states that "The Board may make regulations or orders not inconsistent with this Act" respecting the various phases of its jurisdiction over the handling of grain. Insofar as this section affects the Board's jurisdiction over the storage of grain, the Board is authorized to make regulations governing the issuing of licences; the charges for licences; the fees for the discharge, insurance, storage, cleaning, treatment and handling of grain while in elevators; the delivery, receipt and discharge of grain; the construction or reconstruction of elevators; and in a residual clause "any other matter relating to the handling of grain".

Under the Act several classes of elevators are recognized, the distinction being chiefly dependent on function and location with respect to the movement of grain from producer to consumer. Section 79 (2) specifically states that "Not more than one kind of elevator licence shall be granted to any elevator and the Board may in its discretion determine what kind of elevator licence shall be granted to any elevator, having regard to the nature of the business carried on thereat, its equipment, and the intent and purpose of the terms of this Act". (For definitions of the various classes of elevators as specified by the Canada Grain Act the reader is referred to page 19 in this issue.)

In a storage system containing such diversified elements, ranging from country elevators with a capacity of a few thousand bushels to terminal elevators whose capacities are measured in millions, it would normally be expected that a considerable variety of construction and equipment would be utilized. While this is true as between types of elevators, there is considerable uniformity, both in construction and equipment, within the individual type. Country elevators, almost without exception, are of wooden construction with

rectangular storage bins while terminal elevators are of reinforced concrete construction with cylindrical bins. Full advantage of gravity in loading and unloading operations is utilized in the design of both the elevator structure and its mechanical installations. In addition to loading and unloading equipment, elevators are equipped with weighing facilities and, depending on the type of elevators, additional installations for cleaning and conditioning grain.

Elevators not only differ in their functions, construction and equipment but also in capacity and location, the former varying from country elevators with an average capacity of about 36,000 bushels to terminal elevators with storage accommodation for several million bushels. Country elevators, both in number and capacity, account for a large portion of Canada's grain storage facilities, with one or more of these elevators being located at practically every railway station and siding in the grain-producing areas of the Prairie Provinces. Most of the 'terminal elevators' (as defined in the Canada Grain Act) are located at Fort William and Port Arthur where extensive facilities are provided for the transfer of grain to boats for shipment down the Great Lakes both for export and to Eastern flour mills. Others are located at central points in the Prairie Provinces where accommodation is required for the receipt and storage of inspected grain while still others are at ports of exit such as Vancouver, Prince Rupert and Churchill. In the Eastern Division similar storage facilities (termed 'eastern elevators' under the Canada Grain Act) exist at many lake and ocean ports, Montreal alone having licensed grain storage accommodation of 15.9 million bushels. The majority of elevators at ports on Georgian Bay and the Lower Lakes serve as transfer elevators, receiving grain from boats arriving from the Lakehead and transferring it either to railway box cars for transportation to the interior or to ocean ports, or, in the case of elevators situated at such points as Port Colborne, Kingston and Prescott, to smaller boats for shipment to ports of exit via the St. Lawrence canal system.

The problem of grain storage in Canada is, it will be realized, only one phase in the handling of grain from the time it is harvested on the prairie farm until it is loaded on an ocean-going vessel at a port which may be more than 2,000 miles distant from the harvest field. It is, however, a vital phase and one which has received from technical experts in various fields the application of their combined skill in providing a system of grain storage that is efficient and economical and, at the same time, ensures the retention of the quality of Canadian grain.

Development of Canadian Elevator Capacity - From a total capacity of less than 20 million bushels in 1900 storage space in Canadian elevators increased to a peak of over 600 million bushels in 1941. This development in the provision of grain storage facilities closely parallels the increasing importance during the period of Canada's position in world production and export of wheat. The unbroken upward trend in total storage capacity continued until 1937; since then the storage capacity of elevators proper and permanent annexes has been relatively stable. During World War II, however, the restrictions imposed by limitations of shipping space and overseas markets combined with some of the largest wheat crops ever harvested in western Canada created a storage problem which necessitated the use of temporary and special annexes. The addition of these annexes to the storage capacity of the regular elevators brought the total storage capacity to over 600 million bushels, a condition which lasted for approximately four years. With the depletion of wheat stocks as a result of large export movements following World War II the need for these temporary and special annexes is diminishing, although they still provide storage accommodation in excess of 70 million bushels. Total storage capacity, both permanent and temporary, as at December 1, 1948 was 507,755,670 bushels, of which 95 per cent was licensed under the provisions of the Canada Grain Act.



Capacity of Canadian Grain Elevators, Licensed and Unlicensed  
as at December 1, 1900—1948

Year	Capacity bu.	Year	Capacity -		
			Elevators and Permanent Annexes	Temporary and Special Annexes	Total
			bu.	bu.	bu.
1900	18,329,352	1925	281,746,560	"	281,746,560
1901	22,549,000	1926	284,818,200	"	284,818,200
1902	29,806,400	1927	310,832,200	"	310,832,200
1903	40,636,000	1928	358,254,790	"	358,254,790
1904	46,403,630	1929	394,594,210	"	394,594,210
1905	50,453,200	1930	414,660,260	"	414,660,260
1906	55,222,200	1931	417,111,260	"	417,111,260
1907	58,535,700	1932	419,520,460	"	419,520,460
1908	78,016,100	1933	419,592,660	"	419,592,660
1909	94,266,100	1934	419,890,480	"	419,890,480
1910	105,462,700	1935	420,643,920	"	420,643,920
1911	108,649,900	1936	421,855,620	"	421,855,620
1912	127,224,550	1937	423,063,420	"	423,063,420
1913	154,765,000	1938	422,824,220	"	422,824,220
1914	168,624,000	1939	424,289,570	"	424,289,570
1915	180,988,000	1940	437,018,370	73,140,477	510,158,847
1916	193,844,000	1941	432,112,870	169,078,449	601,191,319
1917	211,591,800	1942	431,739,070	172,515,126	604,254,196
1918	221,279,964	1943	433,791,920 <sup>1/</sup>	172,196,167	604,710,587
1919	226,256,970	1944	433,161,920 <sup>2/</sup>	170,630,470	601,813,890
1920	231,231,620	1945	432,545,920 <sup>3/</sup>	143,335,550	575,180,470
1921	231,633,420	1946	432,905,720	77,147,100	510,052,820
1922	238,107,420	1947	431,418,520	73,778,100	505,196,620
1923	251,194,620	1948	436,376,920	71,378,750	507,755,670
1924	269,900,620				

Source: Board of Grain Commissioners for Canada.

1/ Includes 1,277,500 bushels of unlicensed elevator space authorized as special annexes.

2/ Includes 1,978,500 bushels of unlicensed elevator space authorized as special annexes.

3/ Includes 701,000 bushels of unlicensed elevator space authorized as special annexes.

Current Grain Storage Situation in Canada -

At December 1, 1948 total licensed grain storage capacity in Canada amounted to 486,227,270 bushels of which 414,858,520 bushels were in elevators proper and permanent annexes. Unlicensed elevator capacity on the same date was 21,518,400 bushels, making a combined total of 507,755,670 bushels of licensed and unlicensed storage. On a regional basis, 83 per cent of the total licensed storage capacity was located in the Western Division and 17 per cent in the Eastern Division. Saskatchewan, with total licensed storage capacity of 151,459,400 bushels, led all provinces in this respect. For a more detailed description of the location of licensed grain storage the reader is referred to the table appearing on page 3 of the December, 1948 issue of this publication.



Licensed Storage Capacity of Canadian Grain Elevators  
as at December 1, 1948

Province	Kind of Licence	Elevators Proper and Permanent Annexes	Temporary Annexes	Total
		bu.	bu.	bu.
<u>WESTERN DIVISION</u>				
Manitoba -				
	Public Country .....	24,663,100	9,111,000	33,774,100
	Private Country .....	121,000	-	121,000
	Mill .....	1,775,000	-	1,775,000
	Private Terminal ....	2,940,000	200,000	3,140,000
	Semi-Public Terminal.	3,500,000	-	3,500,000
		32,999,100	9,311,000	42,310,100
Saskatchewan -				
	Public Country .....	99,264,900	36,152,000	135,416,900
	Mill .....	5,018,500	24,000	5,042,500
	Public Terminal .....	11,000,000	-	11,000,000
		115,283,400	36,176,000	151,459,400
Alberta -				
	Public Country .....	68,756,900	25,575,750	94,332,650
	Private Country .....	355,000	-	355,000
	Mill .....	4,010,000	-	4,010,000
	Private Terminal ....	1,605,000	-	1,605,000
	Public Terminal .....	6,100,000	-	6,100,000
		80,826,900	25,575,750	106,402,650
British Columbia -				
	Public Country .....	810,000	316,000	1,126,000
	Mill .....	1,170,110	-	1,170,110
	Semi-Public Terminal.	15,948,000	-	15,948,000
	Public Terminal .....	1,250,000	-	1,250,000
		19,178,110	316,000	19,494,110
Ontario -				
	Public Country .....	25,000	-	25,000
	Mill .....	1,480,000	-	1,480,000
	Private Terminal ....	2,435,000	-	2,435,000
	Semi-Public Terminal.	80,117,210	-	80,117,210
		84,057,210	-	84,057,210
TOTAL - WESTERN DIVISION ....		332,344,720	71,378,750	403,723,470
<u>EASTERN DIVISION</u>				
Ontario - Eastern .....		52,325,000	-	52,325,000
Quebec - Eastern .....		24,912,000	-	24,912,000
New Brunswick - Eastern .....		3,076,800	-	3,076,800
Nova Scotia - Eastern .....		2,200,000	-	2,200,000
TOTAL - EASTERN DIVISION ....		82,513,800	-	82,513,800
GRAND TOTAL - LICENSED STORAGE		414,858,520	71,378,750	486,237,270

Source: Board of Grain Commissioners for Canada.

# Unlicensed Storage Capacity as at December 1, 1948

Province	Capacity
	bushels
Manitoba .....	739,500
Saskatchewan .....	4,532,500
Alberta .....	1,719,500
British Columbia .....	4,951,900
Ontario .....	9,575,000
T o t a l .....	21,518,400

## Summary of Storage Capacity as at December 1, 1948

Type of Storage	Location	Capacity
		bushels
Licensed Permanent Storage	- Western Division .....	332,344,720
	Eastern Division .....	82,513,800
Licensed Temporary Storage	- Western Division .....	71,378,750
Unlicensed Permanent Storage	- Western Division .....	19,918,400
	Eastern Division .....	1,600,000
Total Storage, Licensed and Unlicensed, Temporary and Permanent ...		507,755,670

On the basis of type of licence in effect on December 1, 1948, public country elevators accounted for 65.6 per cent of licensed storage capacity in the Western Division. Semi-public terminals with a capacity of almost 100,000,000 bushels were the next largest group with 24.7 per cent of the total. Mill, private country, private terminal and public terminal elevators made up the remaining 9.7 per cent of licensed storage capacity in the Western Division.

## Distribution of Total Licensed Storage Capacity in the Western Division as at December 1, 1948

	Public Country	Private Country	Mill	Private Terminal	Public Terminal	Semi- Public Terminal
	- thousands of bushels -					
British Columbia ...	1,126	1,170	-	-	1,250	15,948
Alberta .....	94,533	355	4,010	1,605	6,100	-
Saskatchewan .....	135,417	-	5,042	-	11,000	-
Manitoba .....	33,774	121	1,775	3,140	-	3,500
Ontario .....	25	-	1,480	2,435	-	80,117
T o t a l .....	264,675	1,646	12,307	7,180	18,350	99,565
Per Cent of Total	65.6	.4	3.0	1.8	4.5	24.7

Of Canada's 5,677 licensed and unlicensed elevators all but 132 are public country elevators. The predominance of this type follows from its function of receiving grain direct from producers. To perform this function adequately a large number of relatively small elevators must be located within convenient delivery range of the farms. Saskatchewan, with 3,085 public country elevators, accounts for more than half of the total. Elevators in other classes are comparatively few in number but in total they provide more than half the permanent storage capacity in Canada.



Number of Elevators, Licensed and Unlicensed, as at December 1, 1948

	Public Country	Private Country	Mill	Private Terminal	Public Terminal	Semi- Public Terminal	Eastern	Total
B.C.	31	-	11	-	1	9	-	52
Alta.	1,709	4	12	3	3	-	-	1,731
Sask.	3,085	-	12	-	2	-	-	3,099
Man.	715	5	6	2	-	2	-	730
Ont.	5	-	3	2	-	25	18	53
Que.	-	-	-	-	-	-	8	8
N.B.	-	-	-	-	-	-	3	3
N.S.	-	-	-	-	-	-	1	1
CANADA	5,545	9	44	7	6	36	30	5,677

Excerpts from Section Two of the Canada Act 1930 (as amended)

"Elevator" means any premises into which western grain may be received, or out of which it may be discharged, directly from or into railway cars or vessels, and, notwithstanding anything contained in any other general or special Act, includes any such premises owned or operated by His Majesty, either directly or through any individual, public body or company;

"Country elevator" means any elevator in the Western Division in which grain is stored or from which it is discharged before it has been inspected and graded under this Act, but does not include any terminal elevator as hereinafter defined;

"Eastern elevator" means an elevator situate in the Eastern Division;

"Eastern division" means all that portion of Canada lying east of the meridian passing through the eastern boundary of the City of Port Arthur.

"Mill elevator" means an elevator in the Western Division which is operated by a person primarily engaged in the business of manufacturing grain into some other product, into which there is received no grain other than the property of the manager of such mill elevator;

"Terminal elevator" means an elevator in the Western Division into which western grain is received after the issue of an inspection certificate under this Act or contemporaneously with an inspection under this Act upon which an inspection certificate is issued, and includes any elevator in Duluth or elsewhere in the United States of America where provision is made by the Board for the inspection of western grain under the provisions of this Act;

"Licensed", when used with respect to any elevator, includes every elevator of which the manager is the holder of a licence as such under this Act and every elevator into or out of which the receipt or discharge of any grain is recorded or acknowledged in such a way that the manager thereof is punishable under this Act unless he is the holder of such a licence, and when used with respect to any person, includes the holder of every licence of the kind referred to and any person who is a party to any transaction in respect of which he is punishable under this Act unless he is the holder of such a licence;

"Private", when used with respect to an elevator, means an elevator which is either used by the manager exclusively for storage or handling of grain belonging to him alone, or, when the manager is a co-operative association of grain growers, or is a company controlled by one or more such associations, is used by such association exclusively for the storage or handling of grain either belonging to it or produced by or received from some one or more of its members;



"Public", when used with respect to an elevator, means any elevator other than a mill elevator, a private elevator, or a semi-public elevator;

"Semi-public", when used with respect to an elevator, means any elevator, not being a mill elevator, the manager whereof is expressly permitted by the terms of his licence as such manager to bin as he sees fit any grain except wheat graded in any of the four grades first specified in Schedule One to this Act or graded into the grades of No. 1 Canada Western Garnet or No. 2 Canada Western Garnet specified in the said schedule.

"Western division" means all that portion of Canada lying west of the meridian passing through the eastern boundary of the City of Port Arthur.

#### THE CANADIAN FLOUR MILLING SITUATION

Production and Exports - During December Canadian flour mills produced 1,727,899 barrels of flour, 208,528 barrels less than the November output. The December 1948 production was, however, slightly above the same month in 1947 when 1,691,610 barrels were produced. Mills reporting operations for the month had a total rated capacity of 98,035 barrels per 24-hour day and, on the basis of a 26-day working period, 67.8 per cent of the rated capacity was effective. Production of flour during the first five months of 1948-49 amounted to 9,417,701 barrels compared with 11,214,836 barrels during the same period of 1947-48.

Exports of flour for December at 1,027,688 barrels were also down from those of the previous month. Total exports for the August-December period of the current crop year amounted to 5,195,382 barrels, 79 per cent of the exports for the same period in 1947-48.

Production and Exports <sup>1/</sup> of Wheat Flour, 1937-38 to 1948-49

Crop Year	Production	Exports
- 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 <sup>2/</sup>
1946-47 .....	28,588,456	16,896,233 <sup>2/</sup>
1947-48 .....	24,243,711 <sup>3/</sup>	13,661,573 <sup>2/</sup>
1948-49		
August .....	1,619,752	943,152
September .....	2,174,417	815,658
October .....	1,959,206	1,300,286
November .....	1,936,427	1,108,598
December .....	1,727,899	1,027,688
T o t a l - 5 months .....	9,417,701	5,195,382
Same Period 1947-48 .....	11,214,836	6,564,179

<sup>1/</sup> Based on Customs returns.

<sup>2/</sup> Exports for months of August 1945 to September 1948 revised to remove effect of time-lag in the returns made by Customs. Subsequent months to be revised as data become available.

<sup>3/</sup> Subject to revision.

### Ontario Winter Wheat Millings -

Millings of Ontario winter wheat during the first five months of the current crop year have shown a marked increase over the similar periods in 1947-48 and 1946-47. In view of the near-record 1948 Ontario wheat crop of 26 million bushels and greatly increased marketings, the increase in this year's millings of Ontario winter wheat is not surprising. During the first two months of the current crop year 2,193,980 bushels of Ontario winter wheat were milled, more than the entire five-month period in 1947-48 or 1946-47. In the last three months of 1948, however, millings have fallen off rather sharply from the September total of 1,118,459 bushels.

Flour milled from Ontario winter wheat during the first five months of the 1948-49 crop year amounted to 813,658 barrels. Production to the end of December in the current crop year has greatly exceeded that during the same period of 1947-48 and 1946-47 when the output of flour milled from Ontario winter wheat amounted to 340,186 barrels and 375,122 barrels, respectively.

### Millings of Ontario Winter Wheat

	<u>1948-49 1/</u>		<u>1947-48</u>		<u>1946-47</u>	
	<u>Wheat</u>	<u>Flour</u>	<u>Wheat</u>	<u>Flour</u>	<u>Wheat</u>	<u>Flour</u>
	<u>Milled</u>	<u>Production</u>	<u>Milled</u>	<u>Production</u>	<u>Milled</u>	<u>Production</u>
	bu.	bbl.	bu.	bbl.	bu.	bbl.
August	1,075,521	232,077	320,342	72,585	430,652	95,365
September	1,118,459	248,856	238,596	53,901	344,036	81,585
October	635,903	145,759	358,638	78,498	286,888	67,708
November	423,305	104,290	328,755	73,140	258,464	64,298
December	344,337	82,676	233,194	62,062	257,253	66,166
T o t a l	3,597,525	813,658	1,479,525	340,186	1,579,293	375,122

1/ Preliminary.

### THE UNITED STATES WHEAT SITUATION

Wheat Stocks on Farms - According to the Crop Reporting Board of the Bureau of Agricultural Economics, United States Department of Agriculture, stocks of wheat on farms January 1 totalled 381,667,000 bushels, the fifth largest of record. Except for stocks a year ago, current farm reserves are the highest since January 1, 1945. Disappearance from October 1, 1948 to January 1, 1949 was fourth highest of record and totalled 164,484,000 bushels, compared with 183 million bushels for the same period a year ago. Disappearance from farms in the last 6 months of 1948 was 1,001,000 bushels, the highest six-month disappearance of record. Farm stocks this January 1 were 11 per cent below the 429 million bushels on hand a year ago, but were higher than the 10-year average of 334 million bushels. January 1 stocks represented 29.6 per cent of the 1943 crop of 1,288 million bushels of all wheat. A year ago the percentage was 31.4 and the 10-year average 35.4 per cent.

July-December Grain Exports - In a report released on January 19, 1949, the Production and Marketing Administration, United States Department of Agriculture, estimated that 8,764,000 long tons (338,380,000 bushels) of United States grain and grain products were exported in the six months period, July through December 1948. Exports during the same period in 1947 totalled 8,485,000 long tons (328,335,000 bushels). July-December 1948 exports included 7,239,000 long tons (270,231,000 bushels) of wheat, wheat flour, and macaroni products, and 1,525,000 long tons (68,149,000 bushels) of other grains and grain products. Exports during the same



period of 1947 included 6,861,000 long tons (256,109,000 bushels) of wheat, flour and macaroni products, and 1,624,000 long tons (72,226,000 bushels) of other grains and grain products. The larger exports of wheat and flour in 1948 were made possible by record loadings at Gulf ports (particularly in July and August) in the Department's effort to relieve the early-season crowding of terminal storage.

Supply Situation - Disappearance of wheat for milling and export during the first half of the 1948-49 crop year amounted to 520.9 million bushels according to the Production and Marketing Administration, United States Department of Agriculture. Exports of wheat and wheat flour in the July-December period amounted to 268.4 million bushels compared with 253.7 million bushels during the same period of 1947-48. Supplies remaining on January 1 for milling, export or carry-over amounted to 752.4 million bushels, an increase of 101.3 million bushels over last year's total.

#### United States Wheat Supplies

	1942-46 Average	1947-48	1948-49 Preliminary
- million bushels -			
Carry-over stocks, July 1 .....	389.1	83.8	195.9
New crop .....	1,026.9	1,367.2	1,288.4
Total domestic supplies .....	1,416.0	1,451.0	1,484.3
Estimated quantity for feed and seed <u>1/</u> .....	452.0	285.0	211.0
Quantity remaining for milling, export or carry-over .....	964.0	1,166.0	1,273.3
Disappearance July 1 to December 31			
Wheat milled for flour .....	310.3	348.7	331.5
Exports of wheat as grain <u>2/</u> .....	53.2	166.2	189.4
Total exported or milled .....	363.5	514.9	520.9
Balance on January 1 for milling, export or carry-over .....	600.5	651.1	752.4

1/ Includes an estimate for breakfast foods which is not included in the quantity of wheat milled for flour. In the 1942-46 average 53 million bushels of wheat used for industrial alcohol are also included. Use of wheat for alcohol in 1947-48 and this season to date was unimportant.

2/ In addition to grain exports, flour was exported in the equivalent of 79.0 million bushels during July-December this season compared with 87.5 million the same months last season and 35.6 million the 1942-46 average.

Flour Milling Production - Wheat flour production in November was estimated at 22.9 million sacks, by the Bureau of the Census, Department of Commerce. This was 5 per cent lower than production in the previous month (24.2 million sacks). Output was 3 per cent less than the 23.7 million sacks produced in November 1947. Production of flour for the eleven months of 1948 totalled 254 million sacks, a decrease of 9 per cent from the 279 million sacks produced in the corresponding months of 1947. Production for November was at the rate of 83.2 per cent of capacity. Wheat grindings during the month were estimated at 52.4 million bushels as compared with 55.4 million bushels in October.

Continued on page thirty.



Chicago and Minneapolis Cash Wheat -

Neither Chicago nor Minneapolis cash wheat markets has shown much activity during the period under review, with merely nominal prices being quoted in Chicago on most days. Local receipts of wheat at Chicago were light and most of them were applied on previous orders. In view of prospective adequate supplies millers are not inclined to stock up too heavily for future requirements and this has contributed to making a generally slow market. The Commodity Credit Corporation remained the best buyer in the Chicago market although their purchases have also fallen off. Towards the end of the period under review cash wheat in the Minneapolis market dropped slightly below the loan level. Commercial demand has been weak and buying by the CCC has been less active.

Daily Cash Wheat Prices on the Chicago and Minneapolis Markets

1948-49	Chicago		Minneapolis	
	Grade	Price	Grade	Price
December 24	None		1 Dark Nor.	228 - 229
25		Christmas Day		
27	None		1 Dark Nor.	227 - 229
28	2 Red	236 1/2	1 Dark Nor.	228 7/8 - 229 7/8
29	2 Hard	236 1/2	1 Dark Nor.	228 7/8 - 229 7/8
30	3 Red	237	1 Dark Nor.	227 7/8 - 228 7/8
31	5 Hard	232 1/4	1 Dark Nor.	225 1/2 - 226 1/2
January 1		New Year's Day		
3	3 Red	237	1 Dark Nor.	226 5/8 - 227 5/8
4	None		1 Dark Nor.	226 - 227
5	None		1 Dark Nor.	226 - 227
6	None		1 Dark Nor.	226 - 227
7	None		1 Dark Nor.	224 1/8 - 225 1/8
8	3 Red	233 1/4	1 Dark Nor.	221 5/8 - 222 5/8
10	3 Hard	235	1 Dark Nor.	223 5/8 - 224 5/8
11	None		1 Dark Nor.	225 3/4 - 227 3/4
12	None		1 Dark Nor.	226 5/8 - 228 5/8
13	4 Red	234	1 Dark Nor.	226 - 228
14	2 Mixed	234 3/4	1 Dark Nor.	223 3/4 - 225 3/4
15	3 Red	233 3/4	1 Dark Nor.	222 1/8 - 224 1/8
17	1 Hard	235	1 Dark Nor.	222 - 223
18	3 Red	233 1/4	1 Dark Nor.	222 3/4 - 223 3/4
19	3 Red	233 3/4	1 Dark Nor.	223 1/8 - 224 1/8
20	None		1 Dark Nor.	222 1/4 - 223 1/4
21	4 Hard	224 1/2	1 Dark Nor.	224 1/2 - 225 1/2
22	None		1 Dark Nor.	223 1/2 - 224 1/2

# Chicago Wheat Futures -

The wheat futures market at Chicago remained fairly steady during the period December 29 to January 22, although near-by futures showed a tendency to weaken toward the end of the period. New-crop futures showed firmness despite the fact that the condition of a record winter wheat acreage was being improved by rain and snow in the south-west. The bearish influence which this factor might have been expected to exert was probably offset in part by a special E.C.A. report which forecast a continuing need for a high level of bread grain imports to Europe in 1949-50. Also contributing to a firmer tone was the indication of continued government price support of agricultural commodities and the President's request that Congress authorize the construction of grain storage facilities.

## Chicago Wheat Futures, High Points of Closing

1948-49	May	July	September	December
- cents and eighths per bushel -				
December 29	228/8	210/3	209/6	
30	228/1	209/7	210/1	
31	226/2	208/4	208/1	
January 1		New Year's Day		
3	227/2	210/3	210/2	
4	227/1	210/6	210/6	212/4
5	227/1	211/4	211/2	213/2
6	227/1	211/4	211/4	213/3
7	225/2	209/2	209/1	210/7
8	223	207/7	208	209/6
10	224/4	208/5	208/7	210/6
11	226/5	209/7	210/1	211/6
12	227/2	210/2	210/3	212
13	225/3	208/5	208/6	210/4
14	225/3	208/5	208/6	210/6
15	225/2	209/2	209/4	211/2
17	224	208/1	208/2	210
18	224/3	208/4	208/6	210/2
19	225/1	209/2	209/7	211/3
20	224	208	208/3	210
21	225/1	209/6	210/4	211/7
22	224	208/6	209/3	210/7

## THE ARGENTINE WHEAT SITUATION

The following review of the wheat situation in the Argentine is extracted from a report forwarded on January 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 of Argentine to Canadian measures have been made by the editors for the convenience of Canadian readers.

Weather and Crops - During the past four weeks heavy rains have fallen in all grain zones. The drought in the northern sectors of the Provinces of Cordoba and Santa Fe is broken but these areas require further heavy rainfall to improve pastures and build up reserve moisture. The corn zone received good rains during the past couple of weeks which came at a beneficial time for the crop. Corn has recovered from the frost damage in mid November and the condition of the crop is considered satisfactory with better prospects of yield than a month ago. Similarly, recent rains have improved the sunflower stands and its condition is considered good in all zones.

Wheat - The harvesting of wheat is finished in the northern grain zones and fairly well completed in the southern zone. Reports from southern Santa Fe are that they had a record yield in some districts with an average of from 22 to 30 bushels per acre of good quality grain. In the coastal area from Bahia Blanca through Tres Arroyos to Necochea, record yields are also reported with many fields yielding over 30 bushels per acre. In central and western Buenos Aires province, frost damage substantially reduced production and on fields harvested yields are reported to be from 7 to 15 bushels per acre. In Entre Rios the yield averaged 12 to 15 bushels per acre.

As a result of the high yields in sections of Santa Fe and the south of Buenos Aires, private estimates of the current wheat crop have been revised upwards and are now calculated at from 165 to 176 million bushels. This compares with 242 million last year and the five-year average of 198 million bushels.

Argentine Exports to Brazil - According to a press despatch from Brazil, the Brazilian authorities have suspended the importation of wheat flour from any country in order to protect national production. This measure is also expected to increase the quantity of cattle feed. Inasmuch as Argentina, during the first eleven months of 1948, exported to Brazil only 8,322 short tons of flour as compared with 10.8 million bushels of wheat, this step will have little effect on Argentine trade.

Purchase of 1948-49 Wheat Crop - On December 20th IAPI commenced buying the new wheat crop, which operation will continue until October 31, 1949. Offers of wheat must be submitted to the offices of IAPI in Buenos Aires, to the National Products Market in Rosario, or to any branch of the Banco de la Nacion throughout the country. The purchase price, as established a few months previous, is \$1.86 per bushel, bagged, on rail car in port.

Sale of Wheat to Italy - It is reported in the press that Italy will buy 18 million bushels of wheat from Argentina under the trade agreement signed by the two countries in 1948. No information as to price or shipping dates was given.



International Wheat Conference - A press despatch dated January 18th states that Argentina has accepted the invitation to participate in the International Wheat Conference on the 26th of January. This is a reversal of the policy set forth by the President of the National Economic Council last month.

Grain Exports - Exports of grain from Argentina for the year 1948 are as follows:

Argentine Grain Exports, 1948 and 1947

	Wheat	Corn	Oats	Rye	Barley	Flour
	- thousand bushels -					barrels <sup>1/</sup>
United Kingdom ..	1,725	57,793	-	-	12,330	-
France .....	-	5,252	211	-	1,354	-
Belgium .....	3,006	4,363	329	2,539	2,609	-
Italy .....	23,545	2,145	-	1,427	2,754	-
Germany .....	-	7,284	-	-	-	-
Rest of Europe ..	26,133	17,251	4,657	1,607	7,035	25,015
Brazil .....	11,182	-	-	-	-	103,189
Others .....	13,357	5,155	90	-	4,501	-
1948 .....	78,948	99,243	5,287	5,573	30,583	128,204
1947 .....	82,609	93,545	4,911	10,475	28,609	97,126

<sup>1/</sup> 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 January 17, 1949, was received from the Canadian Trade Commissioner in Melbourne:

"Australian wheat stocks at January 8th totalled 135 million bushels. Exports of wheat from December 1 to December 25 totalled 5,637,000 bushels, principally to the United Kingdom, India and New Zealand. Exports of flour were 39,526 long tons of which 18,561 went to Malaya, 10,826 to India and none to the United Kingdom. The new Australian Wheat Board constituted under the Wheat Industry Stabilization Act came into being on December 18. Latest crop estimate still 190 million bushels, (Editor's note: see following paragraph) of which 140 million has been delivered to Wheat Board to date."

1948-49 Wheat Crop Now Estimated at 200 Million Bushels - In a report dated January 21, 1949, Broomhall reports that the recently harvested Australian wheat crop is now officially estimated at 200 million bushels. This estimate is 10 million bushels more than earlier estimates, but still leaves the crop below last year's record harvest of 220 million bushels.

Australia's 1947-48 Wheat Crop Revised Downward - According to a report issued by the Commonwealth Bureau of Census and Statistics, Australia's 1947-48 wheat crop is now placed at 219.9 million bushels, 8.5 million less than the earlier estimate of 228.4 million bushels. The 1947-48 wheat crop harvested

in November and December 1947, and January 1948, was produced on 13.9 million acres yielding an average of 15.85 bushels per acre. New South Wales, with 36 per cent of Australia's wheat acreage, produced 43 per cent of the total wheat crop in 1947-48, more than twice as much as Victoria, the second largest wheat-producing state.

Area, Yield and Production of Wheat, Australia, 1947-48 <sup>1/</sup>

	Area	Average Yield	Production
	acres	Per Acre	
		bushels	bushels
New South Wales .....	5,043,017	18.88	95,227,000
Victoria .....	3,227,162	14.55	46,962,000
Queensland .....	462,239	23.12	10,685,000
South Australia .....	2,368,853	13.64	32,321,000
Western Australia .....	2,760,446	12.50	34,500,000
Tasmania .....	7,776	15.20	118,000
Australian Capital Territory .	4,783	20.91	100,000
Australia .....	13,874,276	15.85	219,913,000

<sup>1/</sup> Source: Summary of Crop Statistics: Australia, Season 1947-48, Commonwealth Bureau of Census and Statistics, Canberra, A.C.T., 28th October, 1948.

Wheat Industry Stabilization Plan - The following report on the Australian Wheat Industry Stabilization Plan has been extracted from the November issue of the "Summary of the Wheat Situation" published by the Commonwealth Bureau of Census and Statistics, Canberra.

"Wheat Industry Stabilization Board - The Wheat Industry Stabilization Plan operated throughout Australia under wartime Commonwealth legislation during each of the seasons 1942-43 to 1948-49. The Plan provides for the registration of farms and licensing of areas by the Wheat Industry Stabilization Board. The area allotted to each grower is fixed in proportion to the average sown during the basic 3-year period. .... Although licensing continued during the seasons 1945-46 to 1948-49, growers were permitted to plant without restriction. In Western Australia, growers' acreages during the seasons 1942-43 to 1944-45 were restricted to a maximum of two-thirds of their basic acreages. During 1945-46, no such restriction was imposed but where growers voluntarily restricted the area sown to five-sixths or less of their basic acreage, compensation equal to one-sixth of their basic acreages was payable; subject to the qualification that half of the area licensed for wheat was cropped for grain. ....

In July of this year, the Commonwealth Minister for Commerce and Agriculture and State Ministers for Agriculture reached agreement on certain modifications to the Commonwealth Stabilization Plan, desired by State Governments. The principal amendment to the plan agreed upon was that the Commonwealth should not control production and that State Governments would undertake the regulation of wheat growing on marginal areas. This modified plan was subsequently adopted by a majority of wheat growers in the four main wheat producing States in polls arranged by the respective States Governments, ....



The Commonwealth recently introduced legislation designed to implement the modified Wheat Stabilization Plan. (Editors' note:- Cabled advice indicates that the State Governments have passed the necessary complementary legislation, making the plan effective up to the end of the 1952-53 season.)

The principal provisions of the modified plan embodied in the Commonwealth Wheat Stabilization Bill, 1948, (which also provides for the repeal of the earlier Commonwealth legislation passed in 1946) are as follows -

- (1) The Commonwealth Government shall guarantee a price of 6/3d. per bushel f.o.r. ports, bulk basis for wheat grown and delivered by wheat growers.
- (2) The guaranteed price which is based on ascertained costs for the 1947-48 season, shall vary according to an index of production costs for each season starting with the 1948-49 crop.
- (3) The guarantee shall apply to the wheat crop marketed through approved organizations for the period up to the end of the 1952-53 season.
- (4) Approved organizations shall be the Australian Wheat Board and those organizations which are empowered by State Governments with authority to receive wheat and to market it as the agents for the Australian Wheat Board.
- (5) The Commonwealth shall ensure the guaranteed price in respect of the export from any one season's crop, provided that this guarantee shall not apply to the quantity of export in excess of 100 million bushels.
- (6) A Stabilization Fund shall be established by means of a tax on wheat exported to meet the guaranteed price above mentioned.
- (7) The tax shall apply when the export price is higher than the guaranteed price, and shall be 50 per cent of the difference between the two but shall not exceed 2s. 2d. a bushel.
- (8) The tax shall apply to the 1947-48 and later wheat crops.
- (9) The Commonwealth agrees that it will not hold an excessive amount in the Fund, and it will consider a refund of tax to the oldest contributing pool whenever the financial prospects of the Fund justify it. (Refunds of amounts contributed in respect of the 1945-46 and 1946-47 harvests have already been approved).

Implementation of the plan is dependent upon complementary action being taken by the States to ensure that -

- (a) The home consumption price is fixed at the same level as the price guaranteed by the Commonwealth under the Plan.
- (b) An approved organization is authorized to receive from wheat growers all wheat voluntarily delivered for sale as part of an Australian pool.
- (c) Legislative authority exists in each State to empower the direction of wheat by the Australian Wheat Board at any time to an approved organization as defined in proposal (4) above.
- (d) Wheat growing on marginal areas which have been reconstructed under the plans approved for the elimination of uneconomic wheat areas is regulated and a committee established to advise in cases where action to regulate wheat growing on marginal areas is necessary.



In discussions between Commonwealth and State Ministers when considering the plan, it was also agreed that -

- (1) States, where they desire to do so, will constitute State Wheat Boards composed of a majority of growers' representatives elected by a ballot conducted by the State.
- (2) Each State Board will nominate growers' representatives, who are growers, to the central authority in accordance with the present grower representation on the Australian Wheat Board.
- (3) It will be optional for any State Board to act either in an advisory or an administrative capacity as decided by the State concerned.
- (4) Where a State Government does not desire to create a State Wheat Board, the machinery of the central authority, i.e., the Australian Wheat Board, is to function.
- (5) Where no State Board is created, growers' representatives to the Australian Wheat Board will be elected by a ballot of growers conducted by the State.

The provisions of the Commonwealth Wheat Stabilization Plan relating to the levy of a tax on wheat exported and the establishment of a Stabilization Fund, have been implemented by the Commonwealth Government under wartime legislation in respect of the 1945-46, 1946-47 and 1947-48 harvests. Contributions to the Stabilization Fund have amounted to about £7 million and £4 million from 1945-46 and 1946-47 harvests respectively and are expected to reach approximately £15 million from the 1947-48 harvest. The Commonwealth Government has introduced legislation providing for the refund to growers of the amounts contributed to the fund from the 1945-46 and 1946-47 harvests, which are equivalent to approximately 1/12d. per bushel and 10 1/2d. per bushel, respectively."

#### NEW ZEALAND WHEAT SITUATION

The following report on the New Zealand wheat situation has been received from the Canadian Trade Commissioner's office in New Zealand and is reproduced with the kind permission of the Trade Commissioner Service.

"The payment of eight shillings and sixpence (about \$1.70 in Canadian money at present exchange rates) a bushel, free on rails, sacks extra for F.A.Q. milling wheat harvested in New Zealand in 1948-49 was recently decided by the New Zealand Government. This price represents an increase of sixpence per bushel above the price of the previous year and the increase is intended to compensate growers for higher costs of production including increase in wage rates, higher tractor operation and maintenance costs and the purchase of fertilizers at an unsubsidized price. New Zealand wheat is all bagged in three bushel sacks which cost three shillings and twopence halfpenny (about 64 cents) each, but growers get a refund of two shillings and ninepence (55 cents) per sack.

A Wheat Committee composed of grower and Government representatives determines the distribution of the harvested crop. This Committee purchases all the milling wheat from farmers through the agency of grain merchants who act as brokers for the Committee. These brokers draw samples of wheat when it is ready for sale, negotiate the sale to millers, order the wheat forward, invoice out and collect the proceeds which they pay into the Wheat Committee's Account in the Bank of New Zealand. The brokers then claim on the Committee for the amount

payable to the farmer and upon receipt of the Wheat Committee's cheque send out this and the account to the Wheat grower. The Wheat Committee does the whole of the work in connection with receiving orders for flour, bran and pollard from bakers, pastrycooks, cake kitchens, grocers, poultrykeepers, merchants and others. The Committee places these orders with the proper mills for economic delivery, invoices all flour, bran and pollard delivered, collects the proceeds and makes payment to the millers. For this work, the Wheat Committee receives 1 1/4 cent of the amount collected to cover the costs involved. The Wheat Committee also takes all the risk so that flour millers have no bad debts whatever to contend with. The Wheat Committee is also responsible for the importation and distribution of all wheat imported into the Dominion. ....

New Zealand only grows a portion of the country's needs and about five million bushels were imported from Australia during the calendar year 1947.

The 1946-47 area of wheat in New Zealand was 144,006 acres. The estimated area for 1948 was 122,000 acres which is the smallest since 1876. The average yield per acre in 1947-48 has been estimated at 37 bushels per acre and the estimated production 4,500,000 bushels. In 1946-47 the production was 5,368,120 bushels. The average yield per acre over a period of years is about 33 bushels.

The principal reason given for the decline in the area in wheat is that the land can be more profitably employed for fat lamb production which requires less labour and involves less risk.

About 95 per cent of the wheat is grown in the South Island, about 75 per cent of the total wheat acreage being on the Canterbury Plains in the vicinity of Christchurch. The most widely grown varieties of wheat are Cross No. 7 (a Tuscan variety) and Fife Tuscan."

#### United States Wheat Situation (Continued from page twenty-two)

Stocks of Wheat, January 1, 1949 - Wheat stocks of 857 million bushels were in all storage positions on January 1, 1949 according to the Bureau of Agricultural Economics, United States Department of Agriculture. While considerably smaller than on January 1, 1942 and 1943, these stocks are larger than on any other January 1 of record. They are 7 per cent more than a year earlier. Disappearance during the October-December quarter of 1948 was about 291 million bushels, which is considerably less than the 327 million bushels in 1947, the 307 million in 1946 and 338 million bushels in 1945, but larger than in that quarter of most preceding years.

The current total includes estimates by the Crop Reporting Board of nearly 382 million bushels on farms, 202 million bushels in interior mills, elevators and warehouses, and over 103 million bushels at merchant mills. Also included are more than 166 million bushels of commercial stocks at terminals, reported by the Production and Marketing Administration, and nearly 4 million bushels in transit owned by Commodity Credit Corporation. Other CCC-owned wheat is included in estimates by positions. No estimate is made for other wheat in transit. The off-farm portion of the total, slightly over 475 million bushels, is relatively large, comparing with 373 million bushels a year ago and 276 million bushels on January 1, 1947. Stocks at interior elevators and terminals are unusually large, in each case the largest since January 1, 1943; merchant mill reserves are at about the usual level.



## CALENDAR OF WHEAT EVENTS

- January 1 During the nine months ending December 31, 1948, Canada supplied wheat and flour valued at \$252,800,000 to countries participating in the European Recovery Program. Purchases of wheat and flour accounted for 43 per cent of the total Canadian procurements authorized by the Economic Co-operation Administration during the period.
- 10 Stocks of wheat on farms in the United States at January 1, 1949 were estimated at 381,667,000 bushels, the fifth largest on record, and well above the ten-year average of 334 million bushels.
- Broomhall reports that Brazil has placed an embargo on flour imports from all parts of the world.
- It is reported that the Bank of Brazil has confirmed the purchase of 200 thousand tons (7.35 million bushels) of Argentine wheat at 60 pesos per quintal (\$4.86 per bushel at the official rate of exchange) F.A.S. Buenos Aires.
- 11 Effective this date, freight rates on export grain moved by rail east of the Lakehead were increased by 5 per cent from Lakehead ports and 6 per cent from Georgian Bay ports.
- France's wheat acreage as of December 1, 1948 was officially estimated at 9,500,000 acres compared with 9,445,000 acres on the same date in 1947.
- 12 According to press reports Italy will take 500,000 tons (18,370,000 bushels) of wheat from Argentina under the 1948 trade agreement involving the exchange of several products. No details as to price or shipping dates were announced.
- 18 Uruguay's 1948-49 wheat crop is estimated at about 550 thousand metric tons (about 20 million bushels) which exceeds last year's production by 12 per cent. The exportable surplus is estimated at 150 thousand tons (5.5 million bushels).
- 19 The Production and Marketing Administration of the United States Department of Agriculture reported that 7,239,000 tons (270,231,000 bushels) of wheat, wheat flour and macaroni products had been exported during July--December, 1948.
- 20 The Canadian Government announced that the price to be paid by the United Kingdom for Canadian wheat in 1949-50, the fourth and final year of the United Kingdom-Canadian Wheat Agreement, would remain at \$2.00 per bushel, the same as being paid during the current crop year.
- 21 Broomhall reported that the official estimate of the Australian wheat crop has been raised to 200,000,000 bushels, an increase of 10,000,000 bushels over the previous estimate.
- 25 The Bureau of Agricultural Economics, United States Department of Agriculture, reported wheat stocks of 857 million bushels in all storage positions on January 1, 1949. With the exception of 1942 and 1943, this year's stocks are larger than on any other January 1 on record.
- 26 Meeting in Washington, delegates from the major wheat exporting and importing countries began discussions in an attempt to form an international wheat agreement to replace that signed last year but never put into operation.



1. The first part of the report deals with the general situation of the country and the progress of the work during the year. It is divided into two main sections: the first section deals with the general situation and the second section deals with the progress of the work.

2. The second part of the report deals with the results of the work during the year. It is divided into two main sections: the first section deals with the results of the work in the field and the second section deals with the results of the work in the laboratory.

3. The third part of the report deals with the conclusions of the work during the year. It is divided into two main sections: the first section deals with the conclusions of the work in the field and the second section deals with the conclusions of the work in the laboratory.

4. The fourth part of the report deals with the recommendations of the work during the year. It is divided into two main sections: the first section deals with the recommendations of the work in the field and the second section deals with the recommendations of the work in the laboratory.

5. The fifth part of the report deals with the summary of the work during the year. It is divided into two main sections: the first section deals with the summary of the work in the field and the second section deals with the summary of the work in the laboratory.



STATISTICS CANADA LIBRARY  
BIBLIOTHÈQUE STATISTIQUE CANADA



1010686462