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CANADA  
DEPARTMENT OF TRADE AND COMMERCE  
DOMINION BUREAU OF STATISTICS  
AGRICULTURAL BRANCH

Vol. 1

No. 1

MONTHLY REVIEW  
of the  
WHEAT SITUATION  
SEPTEMBER 1930

With this issue, the Agricultural Branch of the Dominion Bureau of Statistics begins a monthly review of the wheat situation. Cooperating in this work are the Canadian Trade Commissioners in those countries of the world mainly concerned with wheat production and consumption. The present scope of the review will be considerably expanded when a wider knowledge is gained of the data available and the various sources of information.

Published by Authority of the Hon. H. H. Stevens, M.P.,  
Minister of Trade and Commerce

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EXPORT MOVEMENT OF CANADIAN WHEAT

The exports of Canadian wheat and wheatflour for the month of September have just been made available by the External Trade Branch of the Dominion Bureau of Statistics and are presented in the following table. This table gives the exports of wheat and wheatflour in the two months of the 1930-31 season, compared with the year 1929-30 and with the average of the five crop years 1925-26 to 1929-30.

TOTAL EXPORTS OF WHEAT AND WHEATFLOUR

Month	1930-31	1929-30	Average 1925-26 to 1929-30
	<u>Bushels</u>	<u>Bushels</u>	<u>Bushels</u>
August	20,461,776	13,050,873	17,360,617
September	32,121,623	9,625,524	17,970,697
October		23,215,028	35,409,445
November		24,856,067	50,677,558
December		18,683,198	46,319,649
January		7,257,050	16,582,720
February		8,895,468	16,616,866
March		14,655,609	21,526,470
April		5,459,684	11,552,050
May		16,046,226	27,204,945
June		21,679,434	25,750,589
July		22,833,051	21,781,964
T O T A L		186,267,212	308,853,540

Total exports for the month of September, 1930, amounted to 32,121,623 bushels, almost four times as great as those of the same month in 1929. For the first two months of the crop year these exports were 52,583,399 bushels compared with 22,676,397 bushels for the same period in 1929-30. The five-year average for the month was 17,970,697 bushels and for the two months 35,331,314 bushels.

According to movement by the different shipping routes, 25,825,480 bushels were billed via the United States seaboard ports and 23,863,136 bushels were cleared from the Canadian seaboard ports, i.e., 15,262,445 bushels via Canadian Atlantic ports and 8,600,691 bushels from Pacific ports.

The customs figures show that 31,319,891 bushels were billed to the United Kingdom or orders, while the following countries were the next in order of importance: Netherlands 2,488,923 bushels, Italy 2,076,865 bushels, Belgium 1,944,830 bushels and United States 1,894,694 bushels.

The primary movement of this year's crop compares favourably with last year. The quantity received at the Western Country Elevator was 122,119,178 bushels, compared with 120,071,852 bushels for the same two months of the previous year. In addition to the foregoing 4,195,055 bushels were shipped of the 1930 crop over the loading platforms, while for the same two months in 1929, 3,660,307 bushels were moved. The shipments from the above elevators were 88,988,582 bushels.

The rail movement from the Prairie Provinces to the Head of the Lakes is shown to amount to 60,162,097 bushels for the two months ended September, 1930, just twice the amount for the same two months of 1929.

Lake shipments from the Head of the Lakes were 57,009,931 bushels, of which 30,707,533 bushels went to Buffalo and other United States lake ports. Of the balance, 22,885,294 bushels moved to Georgian Bay and Lower Lake ports. 3,391,163 bushels to Montreal, 243,441 bushels to Quebec, and 82,500 bushels to Sorel, Quebec.

Western inspections for the two months were considerably higher than the same two months in 1929, being 93,271,805 bushels and 55,858,544 bushels respectively. Of this former amount, 86.2% graded No.3 Northern and better, while 84.3% were placed in the same grades for August and September, 1929.





Revised visible supplies of Canadian wheat in Canada and the United States on September 26, 1930, were: 152,210,868 bushels, against 168,324,486 bushels for the same week last year.

### FOREIGN SITUATION

A preliminary estimate of the world wheat crop is calculated to be 4,470,544,000 bushels for 1930-31, as against 4,204,824,000 bushels in 1929-30, and 4,709,304,000 bushels in 1928-29. This is the estimate of the London Grain, Seed and Oil Reporter.

The world's estimated surplus and requirements by countries were as follows, according to the London Grain, Seed and Oil Reporter:

Estimated Surplus	(Bushels)	Estimated World Requirements	(Bushels)
America	168,000,000	United Kingdom	224,000,000
Canada	264,000,000	France	48,000,000
Australia	136,000,000	Belgium	48,000,000
Argentina	160,000,000	Holland	24,000,000
Indian	40,000,000	Germany	56,000,000
Russia	48,000,000	Italy	88,000,000
North Africa )	48,000,000	Austria Hungary	24,000,000
Danube & Chile, etc.)		Spain, Portugal	24,000,000
Carry over at end of		Greece, Switzerland &	
crop years, U.S.A., )	408,000,000	other European Countries	96,000,000
Canada, Australia )		Total European	632,000,000
and Argentine )		Total Non-European	120,000,000
Total	1,272,000,000	Total	752,000,000

The Bureau is in receipt of a communication from Rome, through the Department of Agriculture. Australian wheat area on which harvest is expected this season in thousand acres 18,160. Yield current year forecasted 199,852,464 bushels.

GERMANY.- The Canadian Trade Commissioner at Hamburg reports that the official grain crop estimates of the German Statistical Office for the beginning of September give the following total yields as compared with the final 1929 November estimates:-

	September 1930 (Bushels)	November 1929 (Bushels)
Winter rye .....	299,987,970	316,916,425
Summer rye .....	3,543,165	3,936,850
Winter wheat .....	119,782,506	112,801,317
Summer wheat .....	11,390,361	10,288,068
Winter spelt .....	6,172,838	6,613,755
Winter barley .....	20,209,464	17,453,628
Summery barley .....	102,884,544	128,605,630
Oats .....	354,687,928	478,536,912
Total Yields .....	918,658,776	1,075,152,635

The increased yield of wheat is chiefly due to the greater area cultivated with this grain, the actual yield per hectare being less than in 1929.

The German Statistical Office points out that compared with the average for the last six years (1924-29) this year's harvest can be regarded as a fair average crop. Only in the cases of summer barley and of oats are the yields below the six years' average.

The September estimates are the last preliminary crop estimates of the German Statistical Office before the final November estimates.

CZECHO SLOVAKIA.- According to information submitted by the Canadian Trade Commissioner at Hamburg the State Statistical Office at Prague have published the preliminary estimates of this year's Czechoslovakian grain crop which is calculated to amount to a total of 266,140,387 bushels, as against the figure for last year of 295,127,712. The decline in the total yield is principally attributed to the smaller crop of oats, which is estimated at 80,411,060 bushels. The barley crop is estimated at 56,471,673, which is 7,596,921 bushels less than last year's figure, while the crop of rye is estimated at 63,044,515 bushels, or 4,137,630 bushels less than last year. The wheat crop of 53,071,733 bushels is practically the same as that of last year.

The various estimates are as follows:-





	Estimates September 10th, 1930 (Bushels)	Final Estimates 1929 (Bushels)
Winter wheat .....	51,113,326	50,826,730
Summer wheat.....	1,958,407	2,072,311
Winter rye .....	66,875,271	70,788,500
Summer rye .....	1,169,244	1,393,645
Winter barley .....	284,770	289,363
Summer barley .....	56,186,903	63,779,231
Oats .....	80,411,060	96,868,061
Maize .....	8,141,406	9,109,871
Total Yield ....	266,140,387	295,127,712

AUSTRIA.- The Canadian Trade Commissioner at Hamburg has forwarded the following estimates of the grain crops in Austria, issued by the Official Information Bureau in Vienna:-

	1930 (Bushels)	1929 (Bushels)
Winter wheat .....	11,390,361	11,089,067
Summer wheat.....	558,495	470,312
Winter rye .....	18,448,079	19,223,638
Summer rye .....	873,981	866,107
Winter barley .....	592,505	633,842
Summer barley .....	10,720,202	11,739,861
Oats .....	22,960,694	29,243,922
Total Yield ....	65,544,317	73,266,749

According to this the crops only show a slight change as compared with last year, with the exception of oats, the crop of which was nearly 6,283,228 bushels less than last year.

LITHUANIA.- The Canadian Trade Commissioner at Hamburg reports that according to official statements this year's grain harvest in Lithuania is somewhat poorer than in 1929, although on the whole slightly above average. The quantities of some kinds of grain harvested are greater owing to increases in the areas cultivated with these grains. This is especially the case with rye, of which around 24,605,312 bushels have been harvested or 2,558,952 bushels more than last year, since the area cultivated with rye increased by 50,000 acres. The wheat harvest is also 1,469,724 bushels greater, being estimated at a total of 10,655,499 bushels. The area cultivated with wheat is estimated at 380,000 acres or an increase of 37,000 acres. The wheat harvest represents the largest yield since the war.

On the other hand the crops of barley and oats show considerable decreases. The yield of barley is estimated at 9,875,079 bushels or 2,296,530 bushels less than in 1929. The yield of oats, estimated at 24,964,324, is also 3,242,120 bushels less than last year.

Difficulties are anticipated in finding outlets for the increased supply of bread grains, since there has been a fairly considerable carry-over from last year's crop. There having been an increase in the requirements for fodder grains, the reduced yields of barley and oats should hardly be sufficient.

SOVIET RUSSIA.- The Canadian Trade Commissioner at Hamburg forwards an official estimate of the wheat crop in Soviet Russia, which is given at a total of 760,380,000 bushels, representing an increase of 66,120,000 bushels over the previous year. From August 1st to September 25th, 1930, a total of 12,305,600 bushels of wheat are estimated to have been exported from Soviet Russia.

The Canadian Trade Commissioner at Dublin reports the following on the Irish wheat situation: The official monthly bulletin of the Irish Free State Department of Agriculture states that in every part of the country the weather during August was the worst experienced for many years. The unsettled conditions which prevailed during July continued with increased severity in August and well on into September and all normal farm work was virtually at a standstill during the period. Unusually heavy rains with severe flooding occurred, and in many parts made the gathering of hay in particular impossible. Most of the autumn wheat was cut during August and proved a good crop while at that time spring wheat looked promising. However, as a result of the wet weather and the impossibility of getting on the land in places, it is feared that the yields of sound grain will be below the average.







The production of wheat during the past year was officially stated at . . . and while no estimates for the present season have been issued it is believed that there is a decrease in the area under wheat this year of roughly four per cent. In 1929 the area sown was 28,583 acres.

No reliable statistics are available showing the stocks of wheat or other grains on hand at any period in the Irish Free State. The import figures for August, 1930, the latest period compiled, show that during that month 1,255,051 bushels of wheat valued at \$1,432,635 were imported. This compares with 777,360 bushels valued at \$941,593 for July, 1930, and with 919,073 bushels valued at \$1,299,853 for August 1929. The total imports of wheat for the six months ending June 30, 1930, were 3,930,193 bushels valued at \$5,121,782 as against 5,314,155 bushels with a value of \$7,419,491 for the same period in 1929.

The Canadian Trade Commissioner in Paris, France, reports, under date of September 19th, 1930, as follows:

Wheat Situation in France, the French Colonies  
and Egypt.

**FRANCE.**— Complying with instructions received I am sending you herewith a circular letter from Delphin Destombes which gives statistics of the present wheat situation in France compared with the 1929 crop. These figures are mostly gathered from reports of millers established in different parts of France and are looked upon by the Press in general as being more accurate than the official figures (not yet available) which emanate from reports of Prefects and Mayors of parishes but are not so reliable, farmers as a rule having a tendency to underestimate the prospects of the crop so as to ward off any new taxation.

**ALGERIA.**— The official figures of the Department of Agriculture of Algiers of July 15th, 1930, show that there was a total area under wheat this year of 3,825,247 acres (Hard wheat 3,148,168 acres, soft wheat 677,079 acres). It is estimated that this season's harvest will yield 30,607,002 bushels (Hard wheat 21,788,658 bushels, soft wheat 8,818,344 bushels).

As to quality it is reported that the soft wheat crop is quite satisfactory in the South Cheliff district, but the hard wheat crop in the High Cheliff is a disaster. The soft wheat crop in Bou-Saada, Sidi-Aissa, Ain-Boucif, Chellala and Boghari are normal.

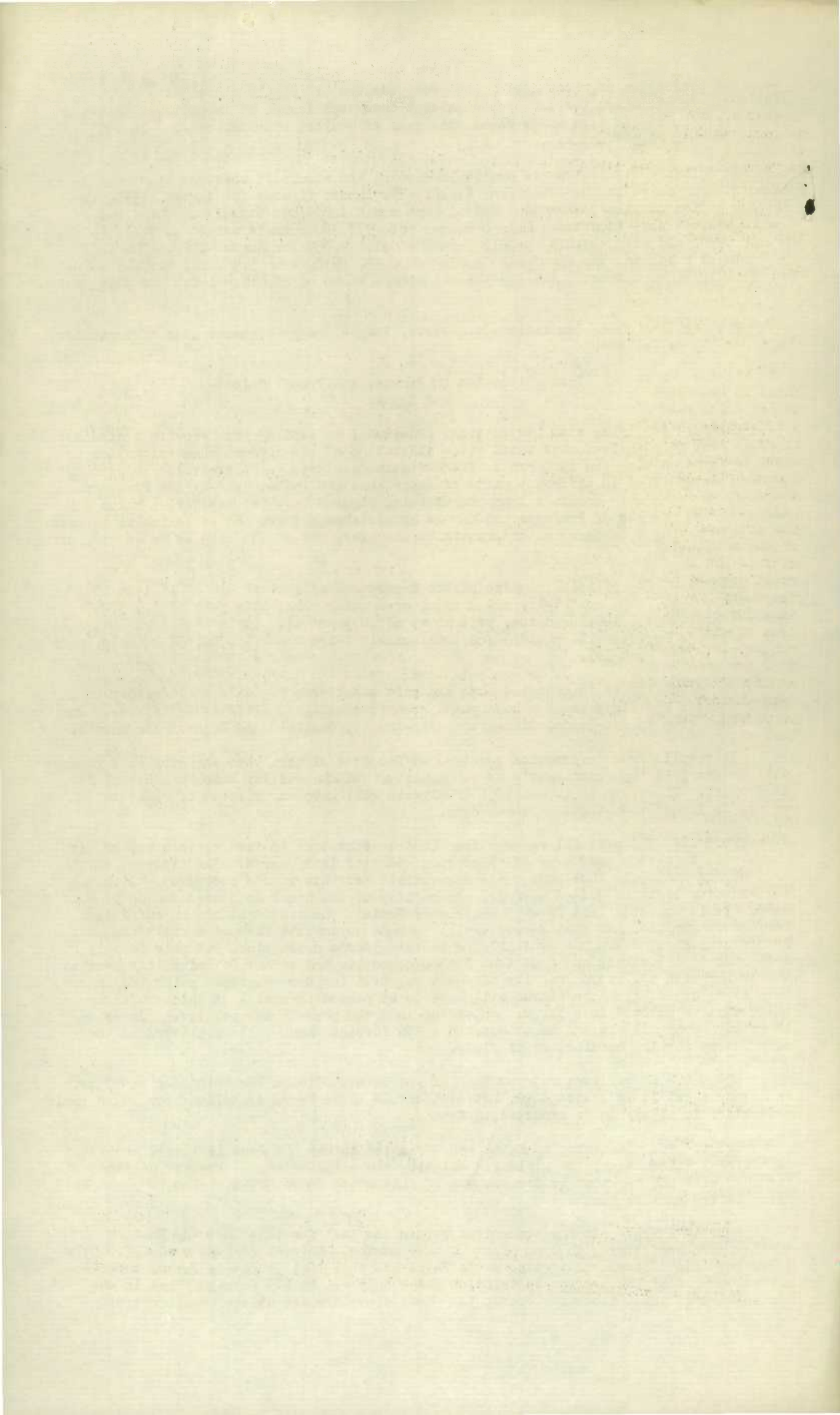
It results from information received so far from Algeria that the crop as a whole will be far less than last year's as to quantity, and the quality below the normal for hard wheat. Therefore it is doubtful if Algeria will have any surplus of wheat to export to France from the last wheat crop.

**TUNISIA.**— The official returns from Tunisia show that in five regions out of six there will be a very poor crop of wheat compared with last year's. The sirocco and the cold nights undergone last summer are responsible for this year's poor crop. Although the quantity might be judged as fair, the quality of the wheat is considered to be very poor. It is expected that in some regions of Tunisia the crop will not be sufficient for the consumption and that recourse will be made to imports for the country's needs. No official figures are yet available as to this year's production, but this is only mentioned to illustrate the fact that France cannot depend on her Colonies this year to supply her with the extra quantity of wheat required for her own consumption and therefore it is expected that a decree will have to be passed according to which foreign wheat will be allowed in a larger proportion than the present law permits. It is expected, among millers and importers, that 25% foreign wheat will be allowed in the near future for the manufacture of flour.

**MOROCCO.**— No official returns have as yet been published regarding the wheat crop in Morocco, but it is anticipated that even should there be an excellent crop but a small proportion is likely to be exported to France.

**EGYPT.**— The wheat crop in Egypt was harvested in May and June last and, according to official information, the yield was slightly above the average. However as the area for 1930 will not be known before the end of this month no estimate of the crop can be given before another month.

**RUSSIAN PERIL.**— It has transpired within the last few days that the Russian Soviets have been trying to dump wheat on this market. Several cargoes coming from the Black Sea have endeavoured to stop at Le Havre and sell their wheat to French importers, but on account of the present legislation which only allows 10% foreign wheat in the manufacture of wheat flour for bread, the wheat elevators are at the moment carrying





sufficient stock for the coming quarter, so that they had to proceed to Italy where I learn they were able to sell their cargo at almost any price. The situation seems to be alike in Holland and England where large stocks of hard wheat have been sold lately below the market price. The French press has mentioned the fact and has warned the Government not to encourage this trade which is but a way of recuperating money for their Bolshevik propaganda in Europe.

NEW FRENCH GOVERNMENT POLICY.- The lack of grain elevators in France was the cause that last year the surplus of the wheat crop had to be exported immediately after the threshing, and this brought such a serious fall in the price of wheat that the French Government had to devote 400 million francs to the grant of a premium corresponding to the taxes collected on foreign wheat for the reexportation of same. Speculators who took advantage of the situation have drained the country, not only of foreign wheat but also of the quantity of home wheat required for France's requirements until this year's crop.

To avoid a repetition of these conditions and in view of standardizing the price of wheat in all seasons, the actual Government has decided to put in force an entirely new policy which consists in encouraging the stockage of wheat in every district of France, and for that purpose the Government will advance to Co-operative farmers' associations in every part of France the funds required to build up or rent warehouses or elevators where the year's crop could be stored after being graded, and sold according to the demand. The decree promulgated on May 31st, 1930, stipulates the conditions in which the money will be advanced to these cooperatives and how the sales shall take place under the supervision of the Department of Agriculture. It further guarantees that the Army and Navy Departments will encourage such associations by taking the quantity of wheat required by their departments from them in preference to buying on the open market. It is expected that this system, once it is established properly, will render great service to the farming community as it will let out only the quantity of wheat necessary for home consumption, therefore preventing speculation as in the past years when farmers had to sell out their crop immediately after the harvest as they were not able to store it properly, or the crop falling as it did in the hands of speculators who had the control of the market. Time will show how this new policy will work out. This new Government measure has plenty of supporters but there are also many people who criticize openly this project as not being practicable for several reasons, mainly because France has never a surplus crop to carry over to the next season, last year being an exceptional one, so that this policy is looked upon more as an election scheme and the money bound to be wasted.

UNITED STATES.- According to the October 1 report of the crops in the United States, the total production of wheat is placed at 839,612,000 bushels, an increase of 2,000,000 over the September 1 estimate. Winter wheat production accounts for 597,000,000 bushels of this total, Durum 52,000,000 bushels, and Spring wheat 190,000,000 bushels.

Reports still continue of the dumping of Russian wheat on the United Kingdom and European markets, although Russia has an apparent shortage for home consumption. Five years previous to the war, Russia exported annually 95,000,000 bushels, while Canadian exports amounted to 60,000,000 bushels. Now, Canada wishes to export from 150,000,000 bushels to 200,000,000 bushels. Up to the present some 22,000,000 bushels of wheat have been shipped out of Russia and trade reports indicate an additional 20,000,000 bushels has been sold for export. All the export from Russia has so far come through the Black Sea ports but it is rumoured that further supplies will come from Northern Russia. Of the total of 26,775,000 bushels afloat for Europe for the week ended October 3, only 575,000 bushels are of Russian origin. The dominant factor in the whole wheat situation is the length of time Russia will be able to ship wheat, at the average rate of the past two or three weeks.

There is no change in the market situation, although there is a reduction in the Canadian and United States primary crop movement. The European supplies are below those of last year, but the tariffs of the three most important importing countries are at such a height that importation is nearly impossible. Germany has a tariff of \$1.20 per bushel and Italy 86 $\frac{3}{4}$  cts. per bushel. France maintains requirements of 90% native wheat for milling mixtures and a tariff of 85 $\frac{1}{2}$  cts. per bushel in addition to a system of refunds of import duties equivalent to an export bounty.

Although it is yet too early to place much credence in quantitative estimates of wheat crops in Argentina and Australia, reports of the growing crops have been generally favourable and promise a good yield from the large acreages sown.





The world shipments of wheat and wheatflour for the week ended October 10, 1930, amounted to 14,697,000 bushels, of which 7,412,000 bushels moved from North America, 709,000 bushels from Argentine, 880,000 bushels from Australia, 176,000 bushels from India, 4,352,000 bushels from Russia, and 1,168,000 bushels from other countries. The total world movement since August 1 amounted to 153,868,000 bushels, compared with 138,928,000 bushels for the same period of last year.

The Trade Commissioner at Glasgow, Scotland, has forwarded the following wheat statistics of the wheat storage, imports and exports for that port.

Origin	Stock	
	September 30	
	1930 Bush.	1929 Bush.
British and Irish.....	6,384	6,000
Black Sea .....	47,080	-
North America and Canadian Red .....	271,112	378,952
Other kinds of foreign Red .....	8,216	-
" " " " White .....	5,416	71,792
South America Red .....	-	10,640
Total	338,208	467,384

Countries -	Imports - Week ending				
	August 30. Bush.	Sept. 6. Bush.	Sept. 15 Bush.	Sept. 22 Bush.	Sept. 30 Bush.
Ireland .....	67,960	116,096	24,640	43,944	39,760
Canada .....	45,440	23,992	34,664	66,664	55,976
United States .....	-	-	-	-	-
France .....	-	55,104	18,664	-	-
Mediterranean & Black Sea .....	-	-	-	-	-
Indian & Eastern Ports... 35,088	-	-	-	-	-
Australia & New Zealand..	-	4,048	-	-	-
Other Foreign Ports.....	-	-	-	-	-
By Railways .....	5,992	4,680	1,464	2,384	552
Total	154,480	203,920	79,432	112,992	96,288
Since January, 1930.	3,651,368	3,855,288	3,934,632	4,050,160	4,146,448
" " 1929	4,687,096	4,920,176	5,096,360	5,288,936	5,422,456

Exports					
Ireland	-	-	224	-	-
Coastwise	416	40	232	136	-
By Railways	4,304	576	464	968	392
Total	4,720	616	920	1,104	392
Since January, 1930.	56,336	56,952	57,872	58,976	59,368
" " 1929	96,704	98,040	98,576	99,512	99,816

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