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

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THE WORLD WHEAT SITUATION

During the past four weeks the volume of world shipments of wheat and wheat flour has decreased sharply. This decrease, not entirely anticipated, has been due to several causes among which may be mentioned the total absence of shipments from Russia, a sharp diminution in shipments from the Argentine and Australia, the development of domestic crops in European importing countries--crops which have been favourably commented upon--and the partial absorption of large floating supplies since the early part of June. The recent decline in the volume of world shipments will decrease the total movement for 1931-32 by a substantial amount. From August 1, 1931 to the end of June, 1932, world shipments of wheat averaged well over 15 million bushels per week whereas during the past four weeks shipments have averaged only about 10 million bushels per week. While the international movement has been light, North America has shipped well over half of total clearances since the first of June and Canada in turn has accounted for the bulk of shipments from this continent. Canadian clearance figures would indicate that Canada has contributed over one-third of the total amount of wheat entering into international trade during the past two months.

From August 1, 1931 to July 16, 1932 world shipments of wheat and wheat flour have amounted to 751 million bushels compared with 765 million bushels for the same period in 1930-31.

- THE SOUTHERN HEMISPHERE -

The movement of wheat from the Argentine and Australia during the past month has been relatively small. During the present crop year, the Argentine and Australia have shipped 138 million bushels and 150 million bushels respectively.

Taking into account the revised estimate of the 1931 crop and the carry-over at the end of July, 1931, total available supplies of wheat in the Argentine for the current crop year amounted to 276 million bushels. Allowing for domestic consumption of 90 million bushels and a carry-over of 40 million bushels on July 31, 1932, total supplies available for export in the Argentine for the present crop year amounted to 146 million bushels. During the first 50 weeks of the present crop year, shipments from the Argentine have amounted to 138 million bushels, leaving a balance of 8 million bushels to be shipped in the remaining weeks of the present crop year.

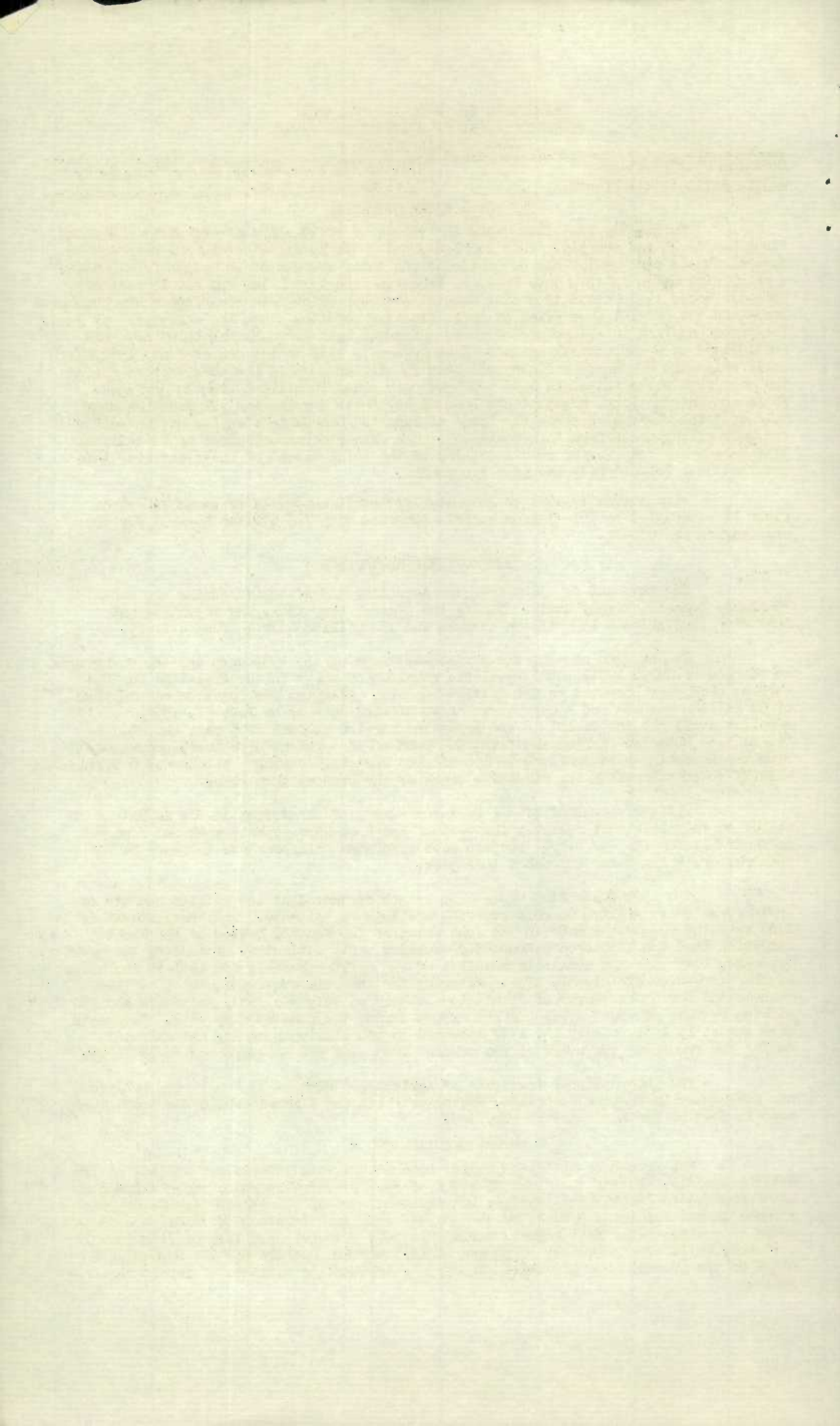
The correspondent of the Dominion Bureau of Statistics in the Argentine cabled on July 16th that recently the weather had been unseasonably warm and damp and unfavourable for the new crop. Locusts have also made an appearance in Santa Fe but measures are being taken to combat this pest.

The 1931 Australian wheat crop is now estimated at 189 million bushels or an increase of 19 million bushels over the preliminary estimate. This estimate is in line with the suggestion made in the June issue of the Monthly Review of the Wheat Situation that the 1931 crop undoubtedly exceeded early estimates. Accepting the new estimate, Australia had available supplies of 225 million bushels for 1931-32 inclusive of the carry-over of July 31, 1931. Allowing for domestic consumption of 50 million bushels and for a carry-over of 25 million bushels on July 31, 1932, Australia had 150 million bushels of wheat available for export during the present crop year. Shipments from August 1, 1931 to July 16, 1932 amounted to 150 million bushels, and shipments during the remaining two weeks of the present crop year are not expected to be large.

The International Institute of Agriculture advises that new crop prospects are favourable in Western Australia, South Australia and Victoria while New South Wales reports need of further moisture supplies.

- IMPORT REQUIREMENTS -

Mr. Broomhall estimates world wheat import requirements for 1931-32 at 776 million bushels. During the first 50 weeks of the present crop year, world shipments have amounted to 751 million bushels, leaving a balance of 25 million bushels to come forward in the remaining 2 weeks of the present crop year in order to fulfil the foregoing estimate. Since last August, world shipments have averaged 15.0 million bushels per week, while average weekly shipments of 12.3 million bushels for the remaining 2 weeks of the present crop year will satisfy Mr. Broomhall's estimate of import requirements.



Crop Prospects in the United States

In a crop report issued on July 11, 1932, the United States Department of Agriculture estimated winter wheat acreage for harvest at 33.2 million acres, or 8.1 million acres less than were harvested in 1931. The most recent official estimate of winter wheat production indicates a crop of 432 million bushels whereas the estimate of June 1st placed the crop at 411 million bushels. The outturn of the 1931 winter wheat crop amounted to 789 million bushels. On the basis of the current estimate of winter wheat production the 1932 crop will be 357 million bushels less than the crop of 1931.

The condition of the spring wheat crop of the United States was given as 84.2 per cent of normal on July 1st as compared with a condition of 53.4 per cent of normal on July 1st, 1931. Spring wheat production, exclusive of Durum, is estimated at 250 million bushels compared with an outturn of 86 million bushels in 1931, and compared with an average outturn of 213 million bushels for the five years from 1924 to 1928. In addition Durum wheat production is estimated at 55 million bushels compared 18 million bushels produced in 1931. Total spring wheat production is estimated at 305 million bushels compared with an outturn of 104 million bushels in 1931.

Summary of United States Wheat Estimates, July 1st, 1932.

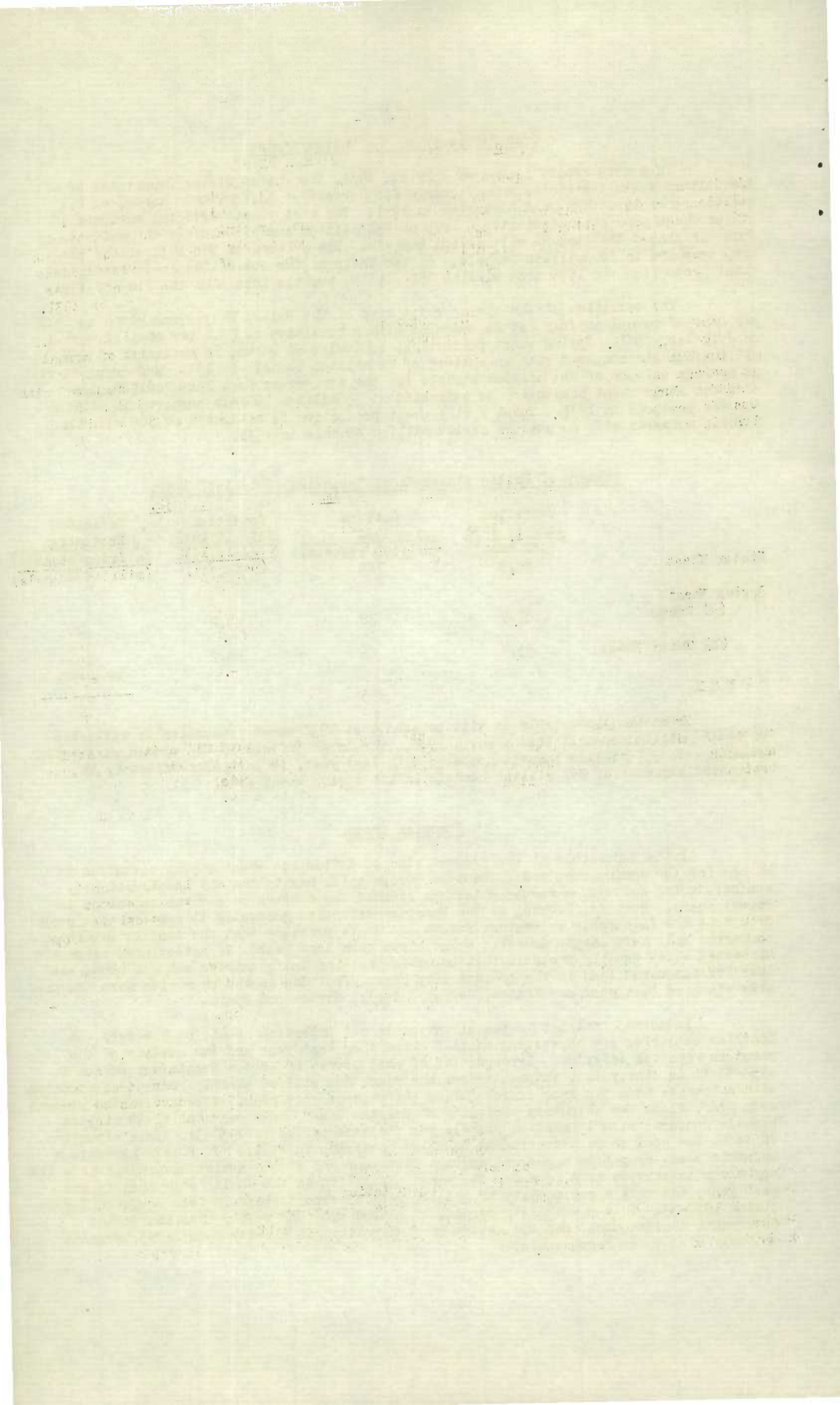
	Condition July 1, 1931 (per cent)	Outturn 1931 (million bushels)	Condition July 1, 1932 (per cent)	Estimated Production (million bushels)
Winter Wheat	82.3	789	64.7	432
Spring Wheat				
(a) Durum	57.9	18	84.2	55
(b) Other Wheat	53.4	86	84.2	250
TOTAL		893		737

From the above table it will be seen that 1932 wheat production is estimated to be 156 million bushels less than in 1931. The large deficit in the winter wheat area amounting to 357 million bushels compared with last year, is partially offset by an estimated increase of 201 million bushels in the spring wheat area.

European Crops

It is impossible at the present time to define the wheat supply situation in Europe for the coming crop year. Western Europe still has to run the hazard of wet weather during harvest, a factor which has reduced the outturn on several occasions in recent years. However, looking at the European situation generally it appears that crop prospects are favourable in western Europe and it is probable that the leading importing countries will have larger domestic wheat crops than last year. If anticipated crops are harvested it is equally probable that importing continental countries can get along with less foreign wheat than in the present crop year. Included in the countries more favourably situated this year are France, Germany, Italy, Greece and Spain.

In marked contrast to the situation in net importing countries however, the Danubian countries are harvesting smaller crops than last year and the quality of the wheat is reported inferior. Irrespective of what course of action Russia may pursue in 1932-33 it is likely that shipments from the Black Sea will be sharply reduced as compared with shipments from the same source during the present crop year. (To date in the present crop year, Black Sea shipments exclusive of Russian wheat, have amounted to 39 million bushels compared with 15 million bushels for the same period in 1930-31. This situation reflects the good crops harvested in Danubian countries in 1931.) If Russia harvests a moderate wheat crop from a reduced acreage this year and if the Soviet Government sees its way clear to provide more food for its large population in the coming year than in the past year, there is a possibility of greatly reduced export pressure from southern Europe during 1932-33. This possibility depends of course upon the policy that the Soviet Government decides upon, and the nature of that policy, if already formulated, remains entirely with those responsible.



Russia

The London Correspondent of the Dominion Bureau of Statistics cables the weather data in the principal wheat areas of Russia each week. The following tables summarize this data for the past four weeks.

District	Temperature		Precipitation		Weather, last day of each week	Ground Condition
	Fahrenheit Min.	Fahrenheit Max.	Inches Min.	Inches Max.		

Week ending June 23, 1932.

Ukraine	43-70	68-86	.0	.7	Cloudy	Dry to wet
Lower Volga	32-59	31-88	.1	.4	Clear to cloudy	Dry
Middle Volga	50-55	80-86	.0	.0	Clear to overcast	Dry
Western Siberia	37-55	66-77	.0	.1	Cloudy	Wet
Caucasus	32-59	84-88	.0	.7	Clear to overcast	Dry to wet
Ural	35-49	68-90	.1	.5	Cloudy to overcast	Dry to wet
Kazakstan	52-77	68-90	.0	.1	Clear to cloudy	Dry
Black Soil Region	50-59	82-88	.1	1.0	Overcast	Dry

Week ending June 30, 1932.

Ukraine	43-61	70-86	.0	.9	Clear to overcast	Dry to wet
Lower Volga	46-64	88-90	.1	.7	Clear to cloudy	Dry to wet
Middle Volga	34-55	73-90	.0	.4	Clear to overcast	Dry to wet
Western Siberia	43-52	66-84	.0	.5	Clear to overcast	Dry
Caucasus	55-59	73-102	.3	1.1	Clear to overcast	Dry
Ural	36-63	59-90	.0	.4	Cloudy to overcast	Dry
Kazakstan	48-57	88-93	.1	.2	Clear to cloudy	Dry
Black Soil Region	54-59	75-84	.1	1.0	Clear	Dry to wet

Week ending July 7, 1932.

Ukraine	43-63	-82	.0	.4	Cloudy	Dry
Lower Volga	52-60	80-90	.0	.6	Cloudy	Dry
Middle Volga	41-50	75-79	.0	.5	Overcast	Dry to wet
Western Siberia	57-64	82-93	.0	1.3	Cloudy to rain	Dry to wet
Caucasus	32-61	60-84	.1	.9	Clear	Dry to wet
Ural	48-60	79-84	.6	.8	Overcast	Dry to wet
Kazakstan	39-60	84-102	.1	.5	Clear to overcast	Dry
Black Soil Region	44-57	80-88	.0	.5	Cloudy to overcast	Dry

Week ending July 14, 1932.

Ukraine	50-64	75-81	.0	.3	Clear	Dry
Lower Volga	50-63	82-86	.2	1.4	Clear to cloudy	Dry to wet
Middle Volga	45-59	68-88	.0	.5	Clear to overcast	Dry to wet
Western Siberia	54-59	72-88	.0	1.1	Cloudy to drizzle	Dry
Caucasus	54-61	72-82	.0	1.3	Clear to cloudy	Dry to wet
Ural	55-64	75-93	.0	1.0	Overcast	Dry to wet
Kazakstan	50-63	86-100	.2	.6	Cloudy to overcast	Wet
Black Soil Region	48-55	75-81	.2	1.3	Clear to rain	Dry to wet

A measure of doubt exists as to what action Russia will take in regard to the wheat market next fall. It is known that the acreage sown to wheat this year is smaller than last year - about 7 million acres less - and that the full spring sowing campaign was not completed according to the 'plan'. In addition severe drought conditions in certain areas in 1931 resulted in a serious lack of sub-soil moisture which will affect the yield this year unless rainfall has been generous. It is equally true that Russia over-exported last fall thereby creating a serious food, feed and seed problem in the present year. No doubt the Soviet Government will be anxious to prevent a repetition of such conditions. In spite of the foregoing elements in the situation there are rumours that Russia has booked freight for August and September. These charters could be used, of course, for commodities other than wheat. No doubt financial considerations will again weigh in arriving at an export policy for 1932-33.

Normal precipitation in Russia

The London correspondent of the Dominion Bureau of Statistics has compiled the following table showing average precipitation for the various wheat areas in Russia for the period from 1870 to 1900. These figures are taken from the reports of Russian meteorological stations for the above period.

MONTHLY PRECIPITATION

NORMALS - 1870-1900.

(In Inches.)

<u>Regions and Stations:</u>	<u>Jan.</u>	<u>Feb.</u>	<u>Mar.</u>	<u>Apr.</u>	<u>May</u>	<u>June</u>	<u>July</u>	<u>Aug.</u>	<u>Sept.</u>	<u>Oct.</u>	<u>Nov.</u>	<u>Dec.</u>
<u>CENTRAL FERTILE</u>												
Koslov	1.38	.98	1.38	1.57	1.77	2.76	2.56	2.36	1.57	1.57	1.57	1.57
Semetchino	1.18	.79	1.13	1.18	1.57	2.56	2.16	2.56	1.77	1.57	1.38	1.57
<u>BASHKEERIA</u>												
Ufa	.79	.59	.79	.79	1.57	2.95	2.36	2.36	1.97	2.16	1.38	1.18
<u>TARTAR REPUBLIC</u>												
Kasanj	.59	.39	.59	.98	1.57	2.16	2.36	2.36	1.57	1.18	.98	.79
<u>MORDOVSKAJA REP.</u>												
Troizk	.59	.39	.59	.79	1.18	2.36	2.76	1.77	1.38	1.38	.79	.79
<u>TOCHUVASH REP.</u>												
Porezkoe	.98	.59	.98	1.38	1.77	2.95	2.36	2.36	1.97	1.57	.98	.98
<u>LOWER VOLGA</u>												
Urjupinsk	.98	.59	.98	1.18	1.38	2.16	1.77	1.57	1.38	1.57	1.38	1.38
Ustj-Medvediza	.98	.59	.98	1.18	1.38	1.77	1.38	1.18	1.18	1.38	1.18	.98
Zarizin	.79	.39	.79	1.18	1.18	1.18	.98	.79	.79	1.18	.98	.79
Saratov	1.18	.79	.79	1.18	1.18	1.57	1.97	1.38	1.18	1.57	1.38	1.57
Kamischin	.98	.59	.79	1.18	1.18	1.38	1.18	.98	.98	1.57	1.18	1.18
Astrakhan	.59	.39	.39	.39	.59	.79	.59	.39	.59	.39	.39	.39
<u>MIDDLE VOLGA</u>												
Orenburg	.98	.79	.98	.98	.98	1.97	1.77	1.38	1.18	1.38	1.18	1.18
Samara	.98	.79	.79	.98	1.38	1.97	1.97	1.57	1.38	1.18	1.38	1.18
Pensa	1.18	.98	1.18	1.18	1.57	2.56	2.36	1.77	1.57	1.57	1.57	1.57

<u>Regions and Stations:</u>	<u>Jan.</u>	<u>Feb.</u>	<u>Mar.</u>	<u>Apr.</u>	<u>May</u>	<u>June</u>	<u>July</u>	<u>Aug.</u>	<u>Sept.</u>	<u>Oct.</u>	<u>Nov.</u>	<u>Dec.</u>
<u>NORTH CAUCASUS.</u>												
Rostov-on-the-Don	1.18	1.18	1.18	1.57	1.57	1.97	1.77	1.18	1.38	1.18	1.38	1.57
Stavropol	1.57	1.18	1.57	2.95	3.14	3.94	3.14	2.16	2.76	2.76	1.38	1.77
<u>CRIMEA.</u>												
Tarkhankut	.59	.39	.59	.59	.59	.98	.98	.59	1.18	.98	.98	.59
<u>UKRAINE.</u>												
Lugansk	.79	.59	.79	1.18	1.77	1.97	1.97	1.38	1.18	1.18	1.18	.98
Losevaja	.79	.98	1.38	1.38	1.77	2.16	2.16	1.77	1.18	1.38	1.57	
Charkov	.98	.98	1.38	1.57	1.77	2.16	2.36	1.97	1.38	1.57	1.57	
Lubni	.98	.79	1.38	1.77	1.77	2.56	2.76	2.16	1.57	1.57	1.57	1.57
Kiev	1.18	.79	1.57	1.77	1.77	2.36	2.95	2.36	1.77	1.77	1.38	1.57
Elisavetograd	.79	.59	.98	1.38	1.97	2.36	2.36	1.77	1.57	1.38	1.38	1.18
Odessa	.98	.79	1.18	1.18	1.38	2.36	1.97	1.18	1.38	1.18	1.57	1.38
Nikolaev	.59	.59	.98	.98	1.38	1.97	1.77	1.18	1.18	1.18	1.18	1.18
Zitomir	.98	.98	1.38	1.38	1.97	2.95	3.34	2.76	1.77	1.77	1.38	1.38
Umanj	.98	.79	1.18	1.38	1.97	2.56	2.95	2.16	1.57	1.38	1.38	1.38
Kamentzk-Podolsk	.98	.98	1.38	1.38	2.16	3.14	3.34	2.76	1.77	1.57	1.38	1.18
Karlovka	.98	.98	1.38	1.57	1.77	2.36	2.36	1.97	1.18	1.38	1.57	1.38
Melitopol	.59	.79	.79	.98	1.38	1.97	1.57	1.18	1.18	1.18	1.18	.98
Krementchug	.79	.79	1.38	1.57	1.97	2.56	2.36	1.77	1.38	1.38	1.57	1.57
Streljzovkij Savod	.79	.59	.98	1.18	1.77	1.97	1.97	1.57	1.18	1.18	1.38	.98
Worms	.79	.59	.98	1.18	1.38	2.36	2.16	1.38	1.18	1.18	1.38	1.18
Ekaterinoslav	.79	.98	1.18	1.57	1.77	2.36	2.16	1.77	1.18	1.18	1.57	1.18
Nikopol	.79	.79	.98	1.18	1.77	2.16	1.97	1.38	1.18	1.18	1.38	.98
Alex.-Pokrovsk	.79	.98	.98	1.18	1.57	2.16	1.97	1.57	1.18	1.18	1.38	.98
Kamenka	.79	.79	1.18	1.18	1.77	2.16	1.97	1.77	1.18	1.18	1.38	.98
Kamenskaya	1.18	.98	.98	1.18	1.57	1.77	1.57	1.18	1.18	1.18	1.18	.98
Genit chesk	.59	.79	.79	.98	1.18	1.38	1.38	.79	1.18	.98	1.18	.98

The Canadian Milling Industry

The Canadian Milling Industry forms the nearest and largest single market for Canadian wheat. Probably because this market is so near at hand, its relative importance is often lost sight of in present day discussions which deal at such length with the question of world markets. During the past six years Canadian mills have ground an average of about 82 million bushels - or in other words have absorbed the equivalent of one crop in every five produced in Canada. Domestic mills have purchased wheat in steady volume throughout the years. It is noteworthy that even in 1930-31, when international trade in wheat and flour was beset with many difficulties, Canadian mills ground only about 10 million bushels less wheat than during the average of the past six crop years.

During the past six years slightly more than one half of the flour milled in Canada has been exported - or about 55 million barrels out of a total production of 109 million barrels. The high quality of Canadian flour sets a high standard in overseas markets, improves the demand for Canadian wheat and in general serves to advertise in a practical way the excellence of Canadian wheat as a milling material.

The following table shows the important position occupied by Canadian mills as consumers of wheat - (Milling statistics compiled by the Dominion Bureau of Statistics cover a high percentage of the mills in operation in Canada and are more comprehensive for recent years).

<u>Year</u>	<u>Wheat ground</u> (Bushels)	<u>Flour produced</u> (Barrels)	<u>Flour exported</u> (Barrels)
1925-26	84,247,552	19,024,715	10,896,654
1926-27	81,105,500	17,861,911	9,247,824
1927-28	87,612,153	19,074,607	9,854,754
1928-29	94,739,029	20,872,094	11,808,775
1929-30	70,630,963	15,787,850	6,778,023
1930-31	71,380,459	15,967,696	6,701,663
	490,715,656	108,588,273	55,298,693
6 year Average -	81,785,944	18,098,048	9,216,449

It is interesting to note that during the six year period from 1925-26 to 1930-31 Canadian mills ground 491 million bushels of Canadian wheat while during the same period, on the basis of corrected import figures, the United Kingdom imported 476 million bushels of Canadian wheat - or about 15 million bushels less than the volume milled in Canada.

Flour Exports

The following table shows the exports of flour from Canada in recent years.

	<u>Average Exports</u> <u>1925-26 to 1930-31</u> (Barrels)	<u>Per cent</u>
To the United Kingdom	2,883,404	32.0
To other Empire countries	1,948,346	21.0
To foreign countries	4,384,699	47.0
Total	9,216,449	100.0

Subject to a margin of error due to changes in destination as from returns made to Canadian Customs authorities, about 32 per cent of Canadian flour exports go to the United Kingdom and about 21 per cent to other Empire countries. The balance or about 47 per cent of exports go to foreign countries. In the crop year 1930-31, customs figures show that Canadian flour was exported to 77 countries including the different units in the Empire. This widespread distribution of Canadian flour exports not only constitute an important phase of Canadian export trade but in addition advertises the milling quality of "Manitobas".

STATE OF TEXAS

County of _____

Know all men by these presents, that _____

for and in consideration of the sum of _____

to _____

do hereby certify that _____

is the true and correct copy of _____

as the same appears from the _____

The Current Year

The following table shows the grindings of Canadian mills, by months, during the present crop year along with comparative figures for 1930-31.

Mill Grindings, by months, 1930-31 and 1931-32.

	<u>1931-32</u> (Bushels)	<u>1930-31</u> (Bushels)
August	5,992,090	7,098,552
September	6,772,319	7,382,097
October	7,565,330	8,822,844
November	8,101,645	7,394,592
December	5,275,097	5,085,031
January	3,798,168	5,046,707
February	3,751,268	4,446,456
March	4,685,646	5,114,511
April	4,446,506	4,733,683
May	4,643,152	5,247,979
Total August to May	55,031,221	60,372,452

As shown by the above table grindings of wheat in Canadian mills for the first ten months of the present crop year have been slightly smaller than for the corresponding months last year. This situation in part reflects the smaller export movement of Canadian flour this year as compared with last year.

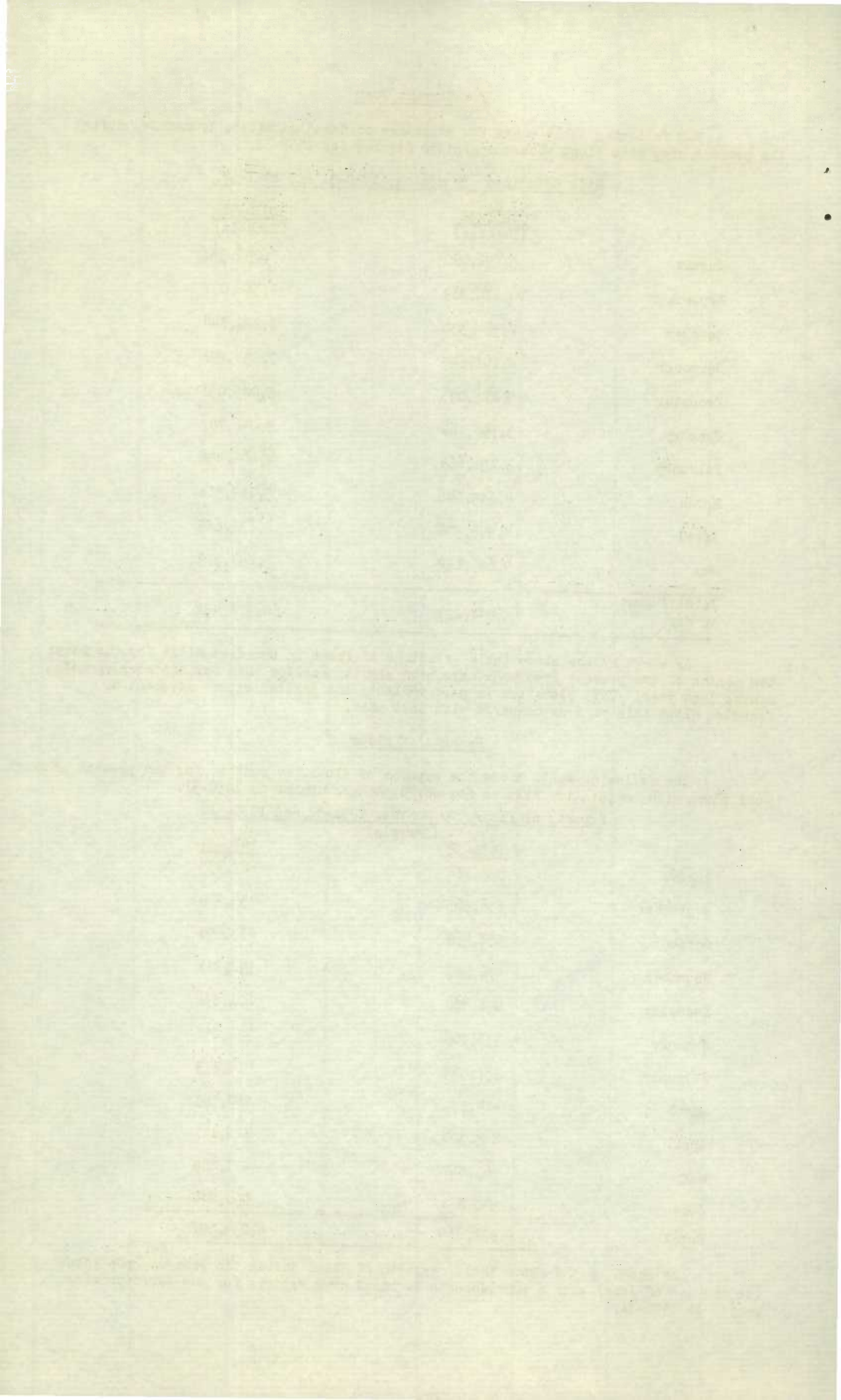
Exports of Flour

The following table shows the exports of flour, by months, for the present crop year along with comparative figures for corresponding months in 1930-31.

Exports of Flour, By Months, 1931-32 and 1930-31.
(Barrels)

	<u>1931-32</u>	<u>1930-31</u>
August	522,178	627,233
September	556,565	734,349
October	558,459	813,691
November	476,487	792,271
December	451,310	601,894
January	331,806	392,256
February	337,513	414,773
March	414,779	560,553
April	255,394	326,117
May	461,867	481,265
June	570,861	490,294
Total	4,937,215	6,234,696

As shown by the above table, exports of flour during the present crop year (to the end of June) show a considerable decrease over exports for the corresponding period in 1930-31.

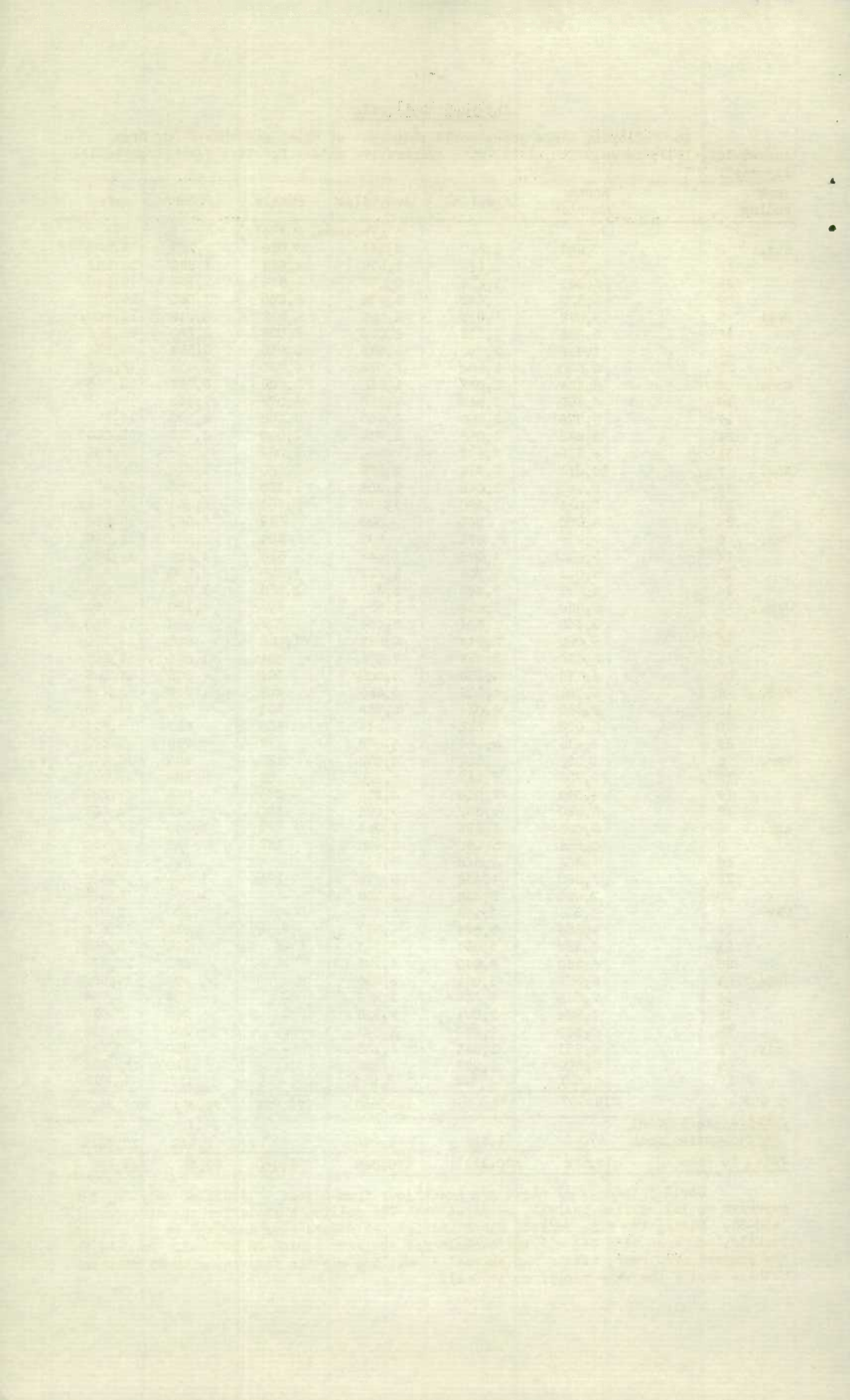


International Trade

The following table shows world shipments of wheat and wheatflour from August 1st, 1931, to July 9th, 1932, with comparative totals for last year (Broomhall's figures).

Week Ending	North America	Argentine	Australia	Russia	Other	Total
	(Thousand Bushels)					
Aug. 8	7,888	1,240	2,144	3,080	1,208	15,560
15	4,296	1,144	1,576	4,484	1,836	13,336
22	5,648	1,352	2,096	4,618	2,176	15,890
29	5,520	1,632	1,776	5,800	1,880	16,608
Sept. 5	6,072	1,912	2,056	4,512	2,048	16,600
12	5,256	1,312	1,248	6,056	2,280	16,152
19	7,648	1,168	1,616	5,040	3,504	18,976
26	5,560	1,504	2,032	4,720	2,112	15,928
Oct. 3	6,424	1,032	1,256	3,368	3,168	15,248
10	8,720	1,848	2,192	3,072	1,632	17,461
17	5,776	1,200	2,000	3,408	3,898	16,272
24	8,632	1,048	1,712	4,040	3,632	19,064
31	6,912	1,472	944	2,088	3,168	14,594
Nov. 7	10,616	1,912	2,656	1,160	2,216	18,560
14	8,936	1,648	1,808	2,480	2,600	17,472
21	7,024	1,360	1,112	2,768	1,752	14,016
28	8,160	944	328	448	2,680	12,560
Dec. 5	7,128	672	992	984	1,864	11,640
12	5,864	1,176	1,448	520	2,352	11,360
19	5,032	1,736	1,528	1,328	2,208	11,832
26	4,272	2,448	3,368	1,256	1,088	12,432
Jan. 2	5,856	1,424	1,536	272	1,120	10,208
9	5,448	1,504	3,464	512	912	11,840
16	5,080	2,744	6,512	1,456	968	16,760
23	5,456	3,856	7,672	304	1,824	19,112
30	4,776	4,168	4,000	384	808	14,136
Feb. 6	5,768	4,208	4,656	408	756	15,776
13	5,240	4,024	5,728	352	752	16,096
20	5,672	4,232	4,544	408	488	15,344
27	4,416	5,144	4,872	112	776	15,320
Mar. 5	4,536	6,344	4,872	136	584	16,472
12	4,736	7,112	5,120	88	920	17,976
19	4,040	7,016	4,320	264	648	16,288
26	5,520	4,352	3,024	200	912	14,008
Apr. 2	6,096	4,232	3,944	224	1,160	15,656
9	4,856	5,080	3,936	152	736	14,760
16	7,304	4,528	3,144	-	944	15,920
23	7,520	4,432	3,176	224	1,024	16,376
30	7,680	5,368	3,736	-	1,288	18,072
May 7	8,856	4,448	5,472	-	1,200	19,976
14	9,656	3,827	4,317	-	316	17,616
21	6,384	3,544	4,744	-	696	15,368
28	6,560	2,040	4,184	-	664	15,448
June 4	8,352	3,024	3,016	-	496	14,888
11	7,334	3,646	3,228	-	500	14,708
18	7,984	2,071	2,396	-	488	12,939
25	5,319	1,996	1,843	-	760	9,918
July 2	6,551	1,048	2,133	-	960	10,692
9	5,807	1,973	1,894	-	680	10,354
16	4,720	465	2,594	-	928	8,707
T O T A L	318,907	137,610	149,965	70,726	74,084	751,708
<u>Comparative 1930-31</u>						
Corresponding week	5,096	1,624	2,296	-	1,648	10,664
Total to date	343,558	120,115	148,840	91,440	60,881	764,832

World shipments of wheat and wheatflour from August 1, 1931, to July 16, 1932 amounted to 751 million bushels, compared with 765 million bushels for the same week in 1930-31. During the same period, North American shipments have amounted to 319 million bushels, compared with 344 million bushels for the same period in 1930-31. To date in the present crop year, Russia has shipped 71 million bushels compared with 91 million bushels during the same period in 1930-31.



- 9 -
Import Requirement Estimate

Mr. Broomhall estimates world wheat import requirements for 1931-32 at 776 million bushels. The position of this estimate on July 16, 1932, is shown in the following table:-

Import Requirements Aug. 1, 1931 to July 31, 1932 (52 weeks)	Actual Shipments Aug. 1, 1931 to July 16, 1932 (50 weeks)	Balance to be shipped July 16, 1932 to July 31, 1932 (2 weeks)
776,000,000 Bushels or 14,923,000 Bushels Weekly	751,308,000 Bushels or 15,026,100 Bushels Weekly	24,692,000 Bushels or 12,346,000 Bushels Weekly

According to the above estimate there is a balance of 25 million bushels to be shipped in the last 2 weeks of the present crop year, or an average of 12,346,000 bushels per week compared with weekly average shipments of 15,026,100 bushels for the preceding 50 weeks.

The Course of Wheat Prices

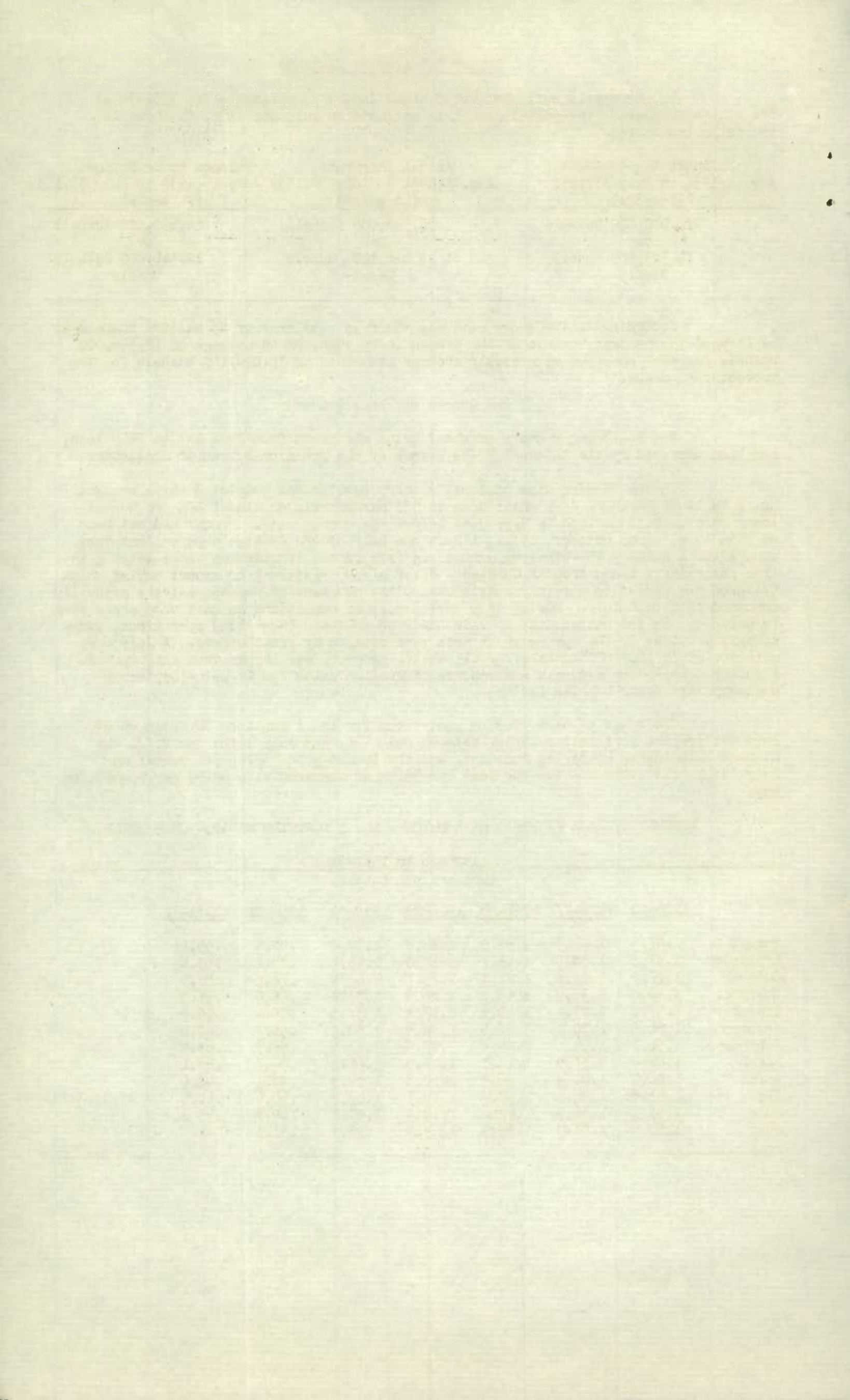
The following summary of wheat price movements from June 1st to July 16th, has been prepared by the Internal Trade Branch of the Dominion Bureau of Statistics.

In the opening days of June, a sharp decline was completed which brought No. 1 Manitoba Northern cash wheat down to 55¢ per bushel, or almost 10¢ per bushel lower than quotations late in May, just before the break came. Prices had not been on this level since October, 1931. Almost one half of the decline came on June 4th, when after a holiday the Winnipeg market ran into forced liquidation while getting into line following a sharp drop at Chicago. After a short interval of export buying which restored the market to a fairly stable basis, the movement of prices was very gradually downward until mid-July. During this period weather conditions in most crop areas were favourable. In the United States, rain hindered southern harvesting operations, and certain sections of the spring wheat area were damaged by grasshoppers. A July crop estimate of 737,000,000 bushels for all wheat, however, was larger than anticipated. A record German crop estimate and reports of Russian sales for August - September delivery were other bearish factors.

The range of cash closing quotations for No. 1 Manitoba Northern wheat, Fort William and Port Arthur basis, between June 1st, and July 16th, was 8.7¢, the highest price being 61.3¢, on June 1st, and the lowest price 52.6¢ per bushel on July 12th. The average price for June was 55.1¢ as compared with 62.9¢ per bushel for May.

MONTHLY AVERAGE WINNIPEG CASH PRICE - NO. 1 NORTHERN WHEAT - CROP YEARS

	1925-26 to 1931-32 (Dollars per bushel)						
	1925-26	1926-27	1927-28	1928-29	1929-30	1930-31	1931-32
August	1.67.5	1.46.3	1.59.9	1.18.8	1.58.0	.92.5	.55.1
September	1.37.5	1.38.5	1.45.1	1.17.0	1.49.5	.78.1	.53.6
October	1.27.0	1.39.6	1.44.1	1.23.7	1.41.4	.72.5	.59.9
November	1.42.0	1.36.2	1.45.1	1.20.9	1.33.0	.64.4	.67.3
December	1.57.0	1.29.2	1.40.6	1.17.1	1.37.8	.55.4	.60.6
January	1.56.5	1.30.9	1.42.8	1.20.9	1.30.5	.53.9	.60.0
February	1.54.7	1.35.1	1.42.6	1.27.9	1.17.4	.59.3	.63.2
March	1.48.4	1.37.6	1.43.1	1.27.0	1.06.2	.56.7	.63.1
April	1.56.9	1.41.2	1.56.3	1.22.8	1.09.8	.59.7	.62.6
May	1.53.8	1.52.3	1.57.2	1.12.3	1.07.9	.60.6	.62.9
June	1.53.1	1.56.9	1.42.6	1.18.3	1.03.2	.60.8	.55.1
July	1.59.6	1.58.3	1.30.9	1.59.9	.95.1	.57.3	--



The Canadian Situation

Crop Conditions in the Prairie Provinces.- Since the first of June crop conditions in the Prairie Provinces have been well maintained and the outlook has improved slightly. On July 11th, the Dominion Bureau of Statistics issued a crop report showing the condition of the wheat crop as at June 30th. The following table shows the condition of the wheat crop in the three western provinces on June 30, with comparative figures as at May 31, 1932 and as at June 30, 1931. (Condition figures in per cent of the long time average.)

	<u>May 31</u>		<u>June 30</u>	
	1932	1931	1932	1931
Manitoba	98	89	96	60
Saskatchewan	92	77	96	45
Alberta	102	84	105	77

It will be noted from the above table that from May 31 to June 30, 1932, the Manitoba crop deteriorated slightly while the condition of the Saskatchewan wheat crop improved by 4 per cent and the condition of the Alberta wheat crop improved by 3 per cent. June 30 condition figures for the Prairie Provinces were the highest for that time of the year since the record year of 1928.

Comparing condition figures for 1932 with condition figures for 1931 a noticeable improvement is noted as early as May 31, in all three provinces. During the month of June, 1932, conditions improved while during the month of June, 1931, crops in all three provinces deteriorated, especially in Saskatchewan and Manitoba. The result is that the condition figures for June 30 in the two years show a marked contrast. On June 30, 1932 the condition of the Saskatchewan wheat crop was 96 per cent compared with 45 per cent at the same date in 1931. On June 30, 1932, the condition of the Manitoba wheat crop was 96 per cent as compared with 60 per cent on the same date in 1931. On the same dates the Alberta wheat crop showed a condition of 105 and 77 per cent respectively.

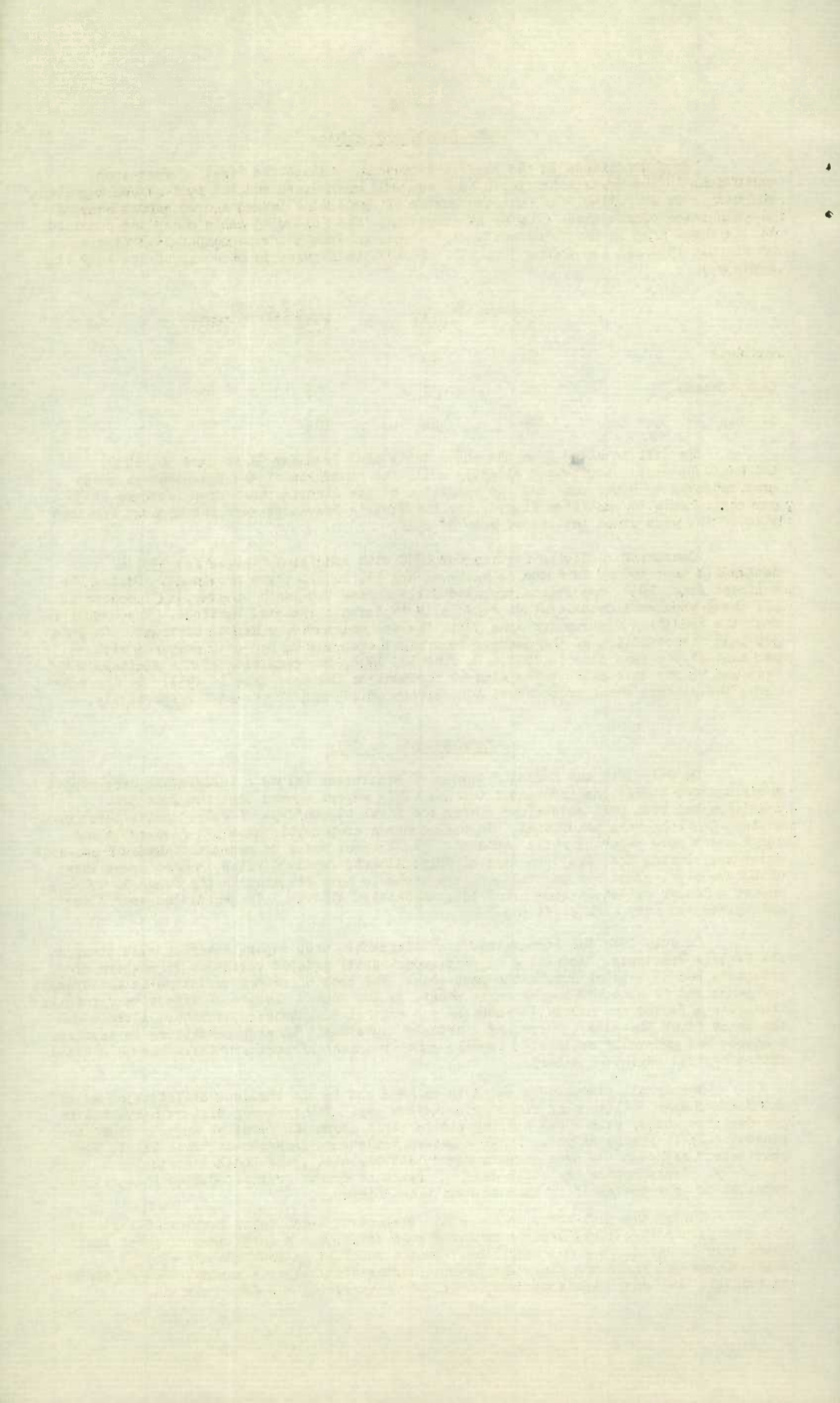
Developments in July

On July 12th the Dominion Bureau of Statistics issued a telegraphic crop report covering crop conditions throughout Canada. This report showed that the June 30th condition had been well maintained during the first eleven days of July. Rains throughout western Manitoba were beneficial. In Saskatchewan crop development was favourable but large areas were reported still dependent upon current rains on account of **lack of sub-soil moisture**. During the first ten days of July, Alberta received rains in most areas where drought was prevalent but permanent damage seems to have resulted in the Peace River areas and to a lesser extent in some areas in southeastern Alberta. In general however Alberta maintained its very high condition.

On July 19th the Bureau issued a telegraphic crop report covering conditions in the Prairie Provinces. According to this report still greater variation in western crop prospects became evident during the past week. The lack of reserve moisture in the drought areas has led to some burning of early wheat, in the recent absence of effective rainfall. The areas affected are mainly in southern and central Saskatchewan, southern Alberta and the Peace River district. There was a notable improvement in crop conditions in southern Manitoba and generally optimistic reports came from most of northern Saskatchewan and the entire central region of Alberta.

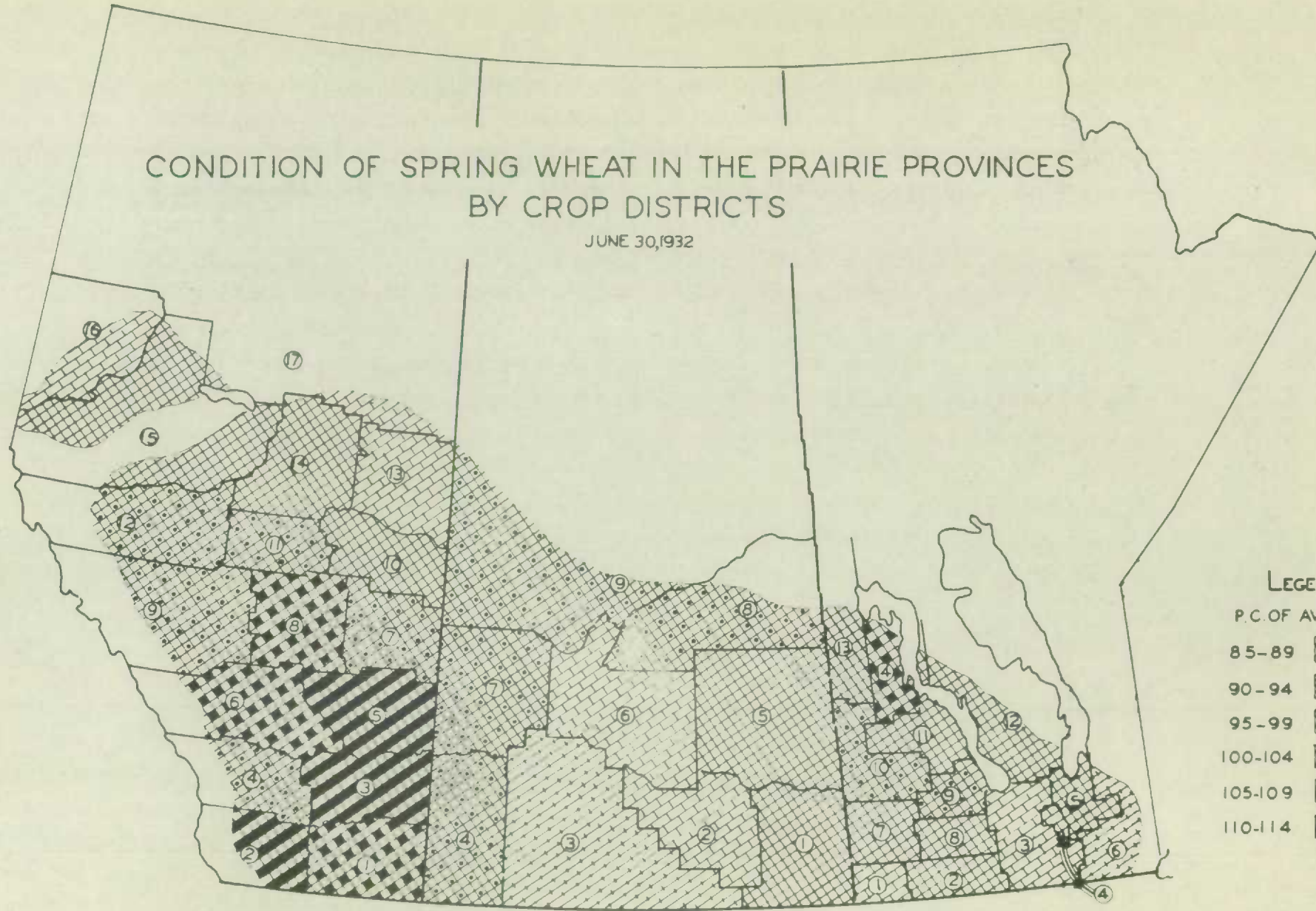
Nearly all the western wheat is in head and in the earliest districts of Manitoba and Saskatchewan, filling and ripening are under way. The rye crop will be harvested in the next two weeks, with wheat cutting due to start about the first of August. Rust is present only in traces as yet. Further severe hailstorms damaged the crops in all three provinces. Although the area covered was relatively small, the local destruction of crop was heavy. Grasshoppers are still causing damage to coarse grains. Common root rot is reported as very prevalent in Saskatchewan wheat fields.

During the past week, southern and west-central Manitoba, northern Saskatchewan and some points in central Alberta received good rains, but a large area of wheat land, where rain is needed, was not benefited. Recent rainfall in southern and central Saskatchewan and in southeastern and extreme northwestern Alberta has not been sufficient to maintain the heavy stands engendered by the heavy spring and June rainfall.



CONDITION OF SPRING WHEAT IN THE PRAIRIE PROVINCES BY CROP DISTRICTS

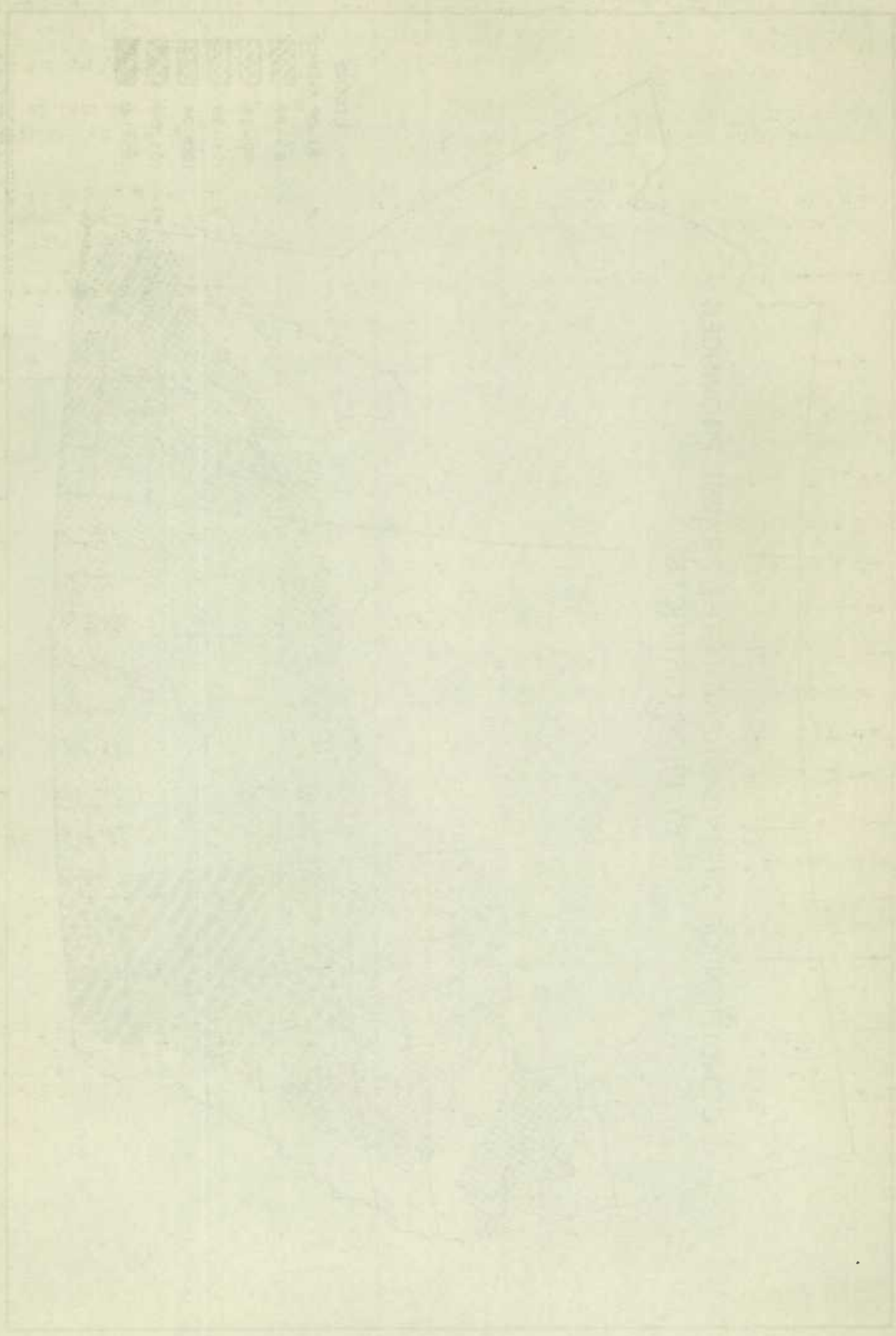
JUNE 30, 1932



LEGEND

P.C. OF AVERAGE

85-89	
90-94	
95-99	
100-104	
105-109	
110-114	



Lake Movement.- The vessel shipments from the Head of the Lakes for the period from the opening of navigation to July 14, 1932 amounted to 47,833,019 bushels, a decrease of 5,715,648 bushels, when compared with the corresponding period in 1931, due to the fact that navigation opened two weeks earlier in 1931. The distribution of the first amount was as follows:-

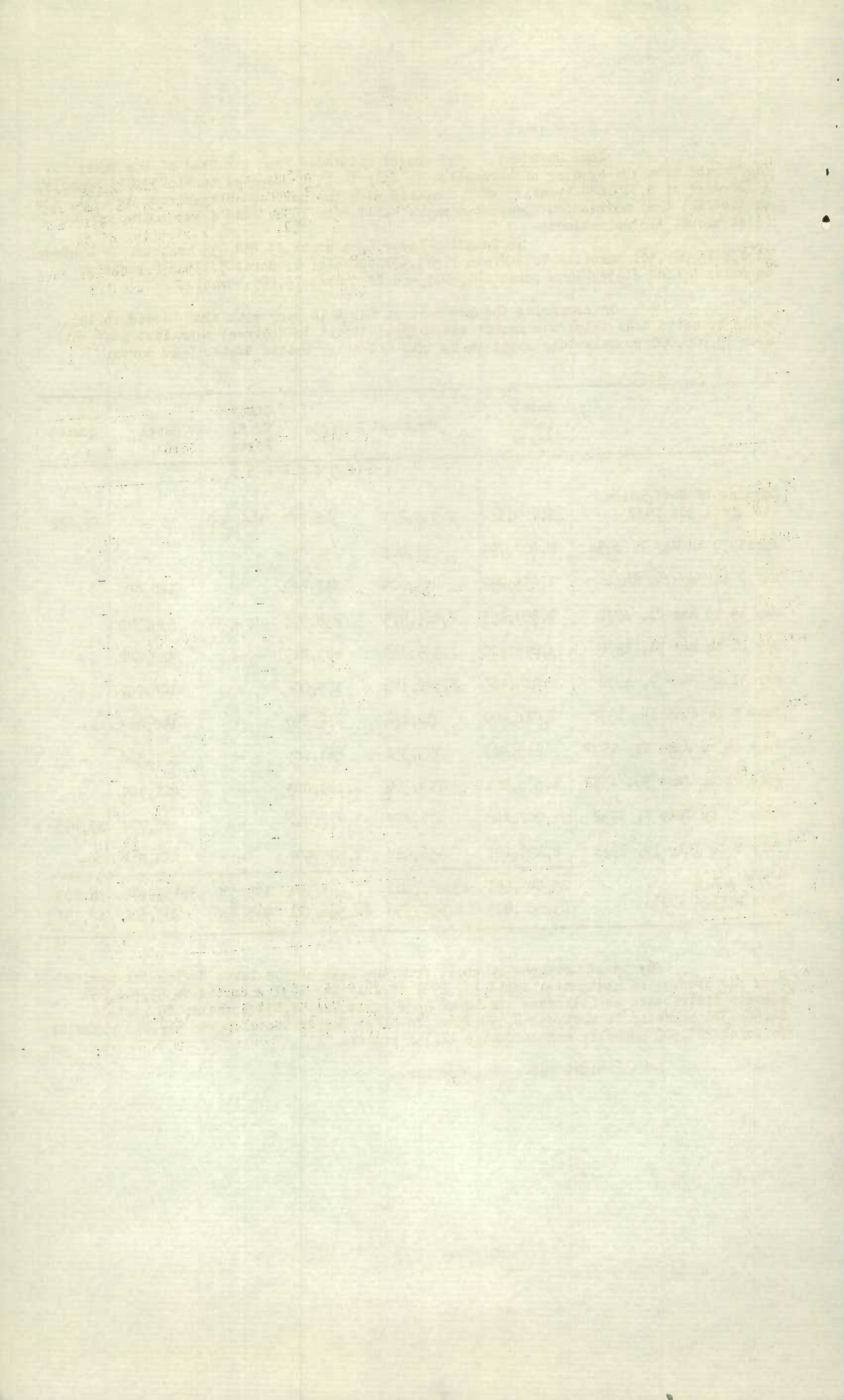
To Canadian Lower Lake ports 23,558,033 bushels; To Montreal direct 13,067,501 bushels; To Buffalo 7,563,901 bushels; To Sorel 3,135,570 bushels; To other United States Lake ports 146,500; and to Quebec 75,895 bushels.

In comparing the movement so far this year with same period in 1931, would be noted that twice the amount was shipped direct to Montreal than last year while over 15,000,000 bushels less moved to Buffalo and other United States Lake ports.

	Lower Lake Ports	Montreal	Buffalo	Other U. S. Ports	Sorel	Quebec
(B U S H E L S)						
Opening of Navigation to April 30, 1932	2,244,132	2,938,817	348,873	146,500	-	62,482
April 30 to May 7, 1932	2,604,799	81,007	631,055	-	-	-
May 7 to May 14, 1932	1,954,452	455,024	811,292	-	120,000	-
May 14 to May 21, 1932	2,200,153	2,267,979	238,993	-	539,379	-
May 21 to May 31, 1932	3,296,920	1,359,239	281,219	-	325,622	-
May 31 to June 7, 1932	2,084,266	2,392,746	175,002	-	108,207	-
June 8 to June 14, 1932	2,211,200	430,174	272,290	-	108,283	-
June 14 to June 21, 1932	675,473	993,351	281,785	-	537,366	-
June 21, to June 30, 1932	1,373,201	714,369	1,113,083	-	221,721	-
June 30 to July 7, 1932	3,002,848	977,867	1,877,312	-	610,777	13,413
July 8 to July 14, 1932	2,196,207	456,928	1,532,997	-	564,214	-
T O T A L S	23,843,651	13,067,501	7,563,901	146,500	3,135,570	75,895
Same period 1931	23,558,033	6,690,856	22,566,321	515,826	205,500	12,131

The total movement of wheat from the Head of the Lakes during the period from the opening of navigation April 15, 1931 to July 14, 1931 amounted to 53,548,667 bushels distributed as follows:- To Lower Lake ports 23,558,033 bushels; To Buffalo 22,566,321 bushels; To Montreal 6,690,856. To other United States ports 515,826 bushels; To Sorel 205,500 bushels, and to Quebec 12,131 bushels.

Lake freight rates continue low.



Country Deliveries of Wheat

The following table shows the combined deliveries of wheat at country elevators and platform loadings for the period from August 1st, 1931 to July 8th 1932, with comparative totals for last year.

<u>Week Ending</u>	<u>Manitoba</u>	<u>Saskatchewan</u>	<u>Alberta</u> (BUSHEL)	<u>Total</u>	<u>Total Last Year</u>
Aug. 7	52,684	258,945	313,528	625,157	431,796
14	111,316	575,840	577,603	1,264,759	875,076
22	926,783	683,872	1,103,292	2,713,947	2,484,320
29	1,388,652	1,959,121	1,028,609	4,376,382	12,126,110
Sept. 4	1,667,980	3,874,823	3,781,236	9,324,039	33,266,767
11	2,641,482	10,242,152	3,306,963	16,190,597	33,423,710
18	4,140,278	6,171,677	2,425,400	12,737,355	17,050,523
25	533,689	2,883,972	1,391,755	4,809,416	20,820,394
Oct. 2	954,298	4,882,179	4,822,894	10,659,371	11,671,075
9	1,077,044	8,958,140	7,125,278	17,160,462	20,336,129
16	1,179,395	9,803,896	7,205,219	18,188,510	9,176,726
23	940,375	9,126,929	9,269,411	19,336,715	6,751,239
31	811,616	7,824,205	7,367,954	16,003,775	11,700,454
Nov. 6	495,984	5,454,068	7,488,536	13,418,588	14,088,941
13	827,548	5,785,065	6,818,008	13,430,621	13,625,180
20	732,529	4,073,288	4,785,199	9,591,016	13,441,911
27	312,176	1,697,857	3,221,333	5,231,366	9,039,386
Dec. 4	330,090	2,009,978	3,619,177	5,959,245	7,069,712
11	314,219	1,759,854	2,890,765	4,964,838	3,691,908
18	276,769	1,450,285	3,246,343	4,973,397	4,144,380
25	177,183	1,232,548	1,988,278	3,398,009	3,453,171
Jan. 1	125,463	753,976	1,222,252	2,101,691	1,412,905
8	96,339	870,054	1,851,307	2,817,700	2,671,066
15	91,788	470,166	1,217,562	1,779,516	1,932,506
22	64,412	553,604	1,545,813	2,163,829	2,236,619
29	161,695	1,346,815	1,927,219	3,435,729	1,957,681
Feb. 5	429,437	291,970	1,319,412	2,040,819	1,574,975
12	617,168	1,265,491	2,294,032	2,942,355	2,340,340
19	85,285	860,287	1,817,598	2,763,170	2,677,181
26	164,275	1,255,446	2,107,629	3,527,350	3,057,822
Mar. 4	172,406	1,210,825	2,033,591	3,416,822	2,827,821
11	164,847	836,838	1,696,306	2,697,991	1,732,957
18	261,656	1,574,973	1,928,653	3,765,282	2,337,640
25	266,882	1,282,708	1,522,848	3,072,438	2,015,954
April 1	167,762	733,393	620,388	1,521,543	1,124,224
8	184,033	607,881	796,290	1,588,204	3,576,040
15	155,209	645,725	995,398	1,796,332	1,790,600
22	162,760	679,180	672,656	1,514,596	1,885,602
29	110,329	370,625	269,917	750,871	1,372,680
May 6	68,009	229,207	330,324	627,540	1,353,709
13	116,037	380,448	359,109	855,594	1,524,380
20	203,823	735,625	698,136	1,637,584	1,621,242
27	224,586	1,113,076	827,150	2,164,812	1,278,929
June 3	397,670	1,982,741	1,996,958	4,377,369	2,501,610
10	638,105	2,464,605	2,052,022	5,154,732	1,990,132
17	341,889	1,755,399	2,139,190	4,236,478	2,243,847
24	142,747	884,137	887,394	1,914,278	1,073,667
July 1	281,312	1,620,393	1,559,752	3,461,457	1,579,077
8	126,593	879,202	821,647	1,827,442	1,267,298
T O T A L S	24,680,271	118,363,484	121,267,334	264,311,089	303,627,412

Export Clearances of wheat.

The following table shows export clearances of wheat (not including wheatflour) from various ports, by weeks, August 1st, 1931 to July 14, 1932:-

Week Ending	Montreal	St. John & W. St. John	Sorel	Halifax	Vancouver	U.S. Ports	Total
			(Bushels)				
Aug. 7	558,931	-	-	-	1,022,316	649,000	2,230,247
14	469,325	-	-	-	313,333	550,000	1,420,984(1)
21	686,254	-	-	-	558,783	801,000	2,046,037
28	802,887	-	165,754	-	592,600	1,371,000	2,932,241
Sept. 3	640,163	-	221,866	-	968,761	13,000	1,843,790
10	1,798,743	-	366,919	-	900,066	99,000	3,164,728
17	1,175,251	-	-	-	651,550	939,000	2,765,801
24	1,355,935	-	291,376	-	548,847	501,000	3,241,927(2)
Oct. 2	1,301,333	-	-	-	933,327	831,000	3,065,660
8	2,051,711	-	277,420	-	684,755	562,000	3,575,896
15	933,544	-	462,032	-	838,412	932,000	3,165,988
22	1,545,764	-	262,413	-	694,595	713,000	3,215,772
29	2,035,755	-	235,000	-	493,466	989,000	3,753,221
Nov. 6	2,908,621	-	434,565	-	2,151,628	635,000	6,129,814
12	1,664,665	-	408,150	-	1,220,080	586,000	3,878,895
19	1,844,180	-	730,308	-	1,417,532	646,000	4,638,020
26	1,713,546	-	452,533	-	1,368,792	203,000	3,737,871
Dec. 3	1,453,067	-	263,778	-	1,947,857	478,000	4,142,702
11	121,563	-	29,608	-	1,349,295	1,620,000	3,120,466
18	-	15,986	-	-	1,566,714	330,000	1,912,700
23	-	71,950	-	-	1,965,091	341,000	2,378,041
31	-	43,978	-	-	2,845,513	375,000	3,264,491
Jan. 8	-	71,983	-	15,939	2,781,765	591,000	3,460,687
15	-	39,934	-	12,000	2,157,164	456,000	2,665,098
22	-	135,153	-	9,276	1,771,842	712,000	2,628,271
29	-	143,389	-	-	2,066,740	232,000	2,442,129
Feb. 5	-	27,987	-	-	2,139,631	586,000	2,753,618
12	-	-	-	-	2,142,055	467,000	2,609,055
19	-	167,774	-	-	1,074,629	1,067,000	2,309,403
26	-	56,947	-	31,922	1,256,348	818,000	2,163,217
Mar. 4	-	369,443	-	-	1,148,346	1,014,000	2,531,789
11	-	165,146	-	-	1,434,116	593,000	2,192,262
18	-	234,281	-	-	1,352,261	632,000	2,218,542
25	-	154,716	-	-	1,662,083	430,000	2,246,799
31	-	273,575	-	7,974	2,080,777	614,000	2,976,326
Apr. 8	-	33,650	-	-	1,565,448	767,000	2,366,098
15	-	11,116	-	-	2,579,158	486,000	3,076,274
22	402,933	-	-	-	2,980,088	666,000	4,049,021
28	1,735,369	-	228,800	-	1,718,171	493,000	4,175,340
May 6	3,088,620	-	-	-	1,825,484	592,000	5,506,104
13	2,738,411	-	-	-	2,336,599	645,000	5,720,010
20	1,525,189	-	193,600	-	1,541,841	755,000	4,015,630
27	1,917,285	-	-	-	1,365,915	709,000	3,992,200
June 2	2,711,480	-	549,933	-	1,369,793	542,000	5,173,206
9	2,135,768	-	32,014	-	1,375,952	344,000	4,111,734(3)
17	2,201,563	-	32,023	-	1,877,484	997,000	5,108,070
24	2,083,588	-	-	-	1,030,462	669,000	3,783,050
July 1	1,699,079	-	926,882	-	1,000,449	389,000	4,015,410
8	2,123,526	-	37,127	-	949,398	336,000	3,766,371(4)
14	1,327,433	-	-	-	1,127,020	Not received	2,454,453(5)
Totals	50,751,482	2,017,008	6,602,101	77,111	72,744,342	31,766,000	164,135,499

- (1) Includes shipment of 88,326 bushels from Quebec.
- (2) Includes shipment of 544,769 bushels from Churchill.
- (3) Includes shipment of 244,000 bushels from Victoria, B.C.
- (4) Includes shipment of 320,320 bushels from Prince Rupert.
- (5) Montreal and Vancouver only.

Stocks of Canadian Wheat in Store

Stocks of Canadian wheat in store in Canada and the United States are shown as follows (with comparative totals):-

<u>July 8th, 1932.</u>	(Bushels)
Western Country Elevators	39,301,000
Interior Terminal Elevators	106,430
Vancouver Elevators	10,181,465
Victoria Elevators	337,349
Prince Rupert Elevators	837,533
Churchill Elevators	2,274,422
Fort William and Port Arthur Elevators	53,544,853
Interior Private and Mill Elevators	6,269,670
In Transit, Lakes	4,980,821
Eastern Elevators - Lake Ports	7,199,001
Eastern Elevators - Sbd. Ports	7,572,104
U. S. Lake Ports	2,480,000
U. S. Atlantic Seaboard Ports	2,837,000
T O T A L	137,921,648
Week ending June 11, 1932	139,614,245
Week ending July 10, 1931	113,678,095
Week ending June 12, 1931	125,744,673

During the four week ending July 8, 1932, stocks of wheat in country elevators decreased by about 17 million bushels. Stocks in store at Pacific Coast ports increased slightly during the same period. During the month stocks of wheat at Churchill increased by over 1 million bushels. Stocks at Fort William and Port Arthur increased by about 10 million bushels. Stocks of wheat at Eastern lake ports, United States lake ports, and Canadian seaboard ports increased slightly during the past four weeks while stocks at United States seaboard ports decreased by about 900,000 bushels. Stocks in transit on the Great Lakes decreased slightly.

In general changes in stocks in various positions have reflected the movement from western country elevators to make way for the new crop. Exports and domestic mill demand during the four weeks slightly exceeded the volume delivered by farmers at country elevators with the result that total stocks in store in Canada and the United States have decreased by about 2 million bushels during the four weeks ending July 8th.

Overseas Movement.-

The following table shows Canadian exports of wheat and wheatflour for the first nine months of the present cereal year, with comparative figures for 1930-31, 1929-30 and the five year average 1925-26 to 1929-30.

Months	1931-32	1930-31	1929-30	Average 1925-26 to 1929-30
	Bushels	Bushels	Bushels	Bushels
August	14,258,909	20,461,776	13,050,873	17,360,617
September	16,840,180	31,121,623	9,625,524	17,970,697
October	21,438,369	33,445,885	23,215,028	35,409,445
November	29,596,255	34,783,144	24,866,067	50,677,528
December	24,386,870	24,938,920	18,683,198	46,319,649
January	10,965,473	11,374,004	7,257,050	16,682,720
February	11,417,172	12,163,082	6,895,468	16,616,866
March	11,788,039	15,418,055	14,655,609	21,526,470
April	8,662,544	6,148,295	5,459,684	11,552,050
May	17,621,415	31,687,391	16,046,226	27,204,945
June	18,426,302	22,989,542	21,679,434	25,750,989
July	-	14,106,169	22,833,051	21,781,964
T O T A L S	-	258,637,887	186,267,212	308,853,540

Exports of Canadian wheat and flour for the month of June amounted to 18,426,302 bushels. This export movement constituted a slight improvement over the month of May when 17,621,415 bushels were exported. Exports in June were the largest since last December but did not equal the total volume exported during the month of June 1931.

The Statistical Position of Canadian Wheat Supplies.

The following table shows the statistical position of Canadian wheat at June 30, 1932, with comparative figures for last year. (Calculated on the basis of the revised estimate for 1930 and the final estimate for 1931, as issued on January 21st, by the Dominion Bureau of Statistics).

	<u>1930-31</u> (Bushels)	<u>1931-32</u> (Bushels)
Carryover July 31st.	111,094,912	133,381,623
Production	420,672,000 ^{1/}	304,144,000 ^{2/}
Total Supplies	531,766,912	437,525,623
Domestic Requirements	134,000,000	121,000,000 ^{3/}
Available Supplies	397,766,912	316,525,623
Exports - August to June	244,531,718	185,400,626
Balance for export and carryover.	153,235,194	131,124,997

1/ Revised Estimate.

2/ Final Estimate.

3/ Preliminary Estimate.

According to the data given above Canada had, at the end of June, a surplus of 131 million bushels available for export and carryover. This position is arrived at in spite of the fact that exports in the first eleven months of the present crop year have amounted to 185 million bushels compared with exports of 245 million bushels for the same period in 1930-31. Should distribution data show that the 1931 crop has been underestimated, the figures for 1931-32 will have to be revised upward.

While available supplies at the beginning of August, 1931, were 81.2 million bushels lower than at the same date in 1931, the lower exports of this season have reduced this disparity in stocks to 22.1 million bushels. Exports for the first eleven months of the present crop year were 59.1 million bushels below those of the same months of 1930-31.

CANADIAN TRADE COMMISSIONERS REPORT AS FOLLOWS:-

GERMANY. - The Markets Reports Bureau of the German Agricultural Council have published the results of their investigations as to the stocks of grain still in the hands of farmers on May 15th., 1932, in the form of percentages of the final crop estimates, which are as follows, compared with the percentages for the same date of the previous year:-

<u>Kind of Grain</u>	<u>Percentage of Total Crop in Hands of Farmers</u>	
	<u>May 15th.</u> <u>1932</u>	<u>May 15th.</u> <u>1931</u>
Winter wheat.....	5.9	4.7
Summer wheat.....	9.4	6.9
Winter rye.....	8.4	11.7
Winter barley.....	4.5	4.9
Summer barley.....	7.6	4.2
Oats.....	19.1	21.3
Potatoes.....	8.4	8.6

The German Grain Journal has translated these percentages into actual quantities, which the following table shows in bushels:-

<u>Kind of Grain</u>	<u>Total Crop in Hands of Farmers</u>	
	<u>May 15th.</u> <u>1932</u>	<u>May 15th.</u> <u>1931</u>
Winter wheat.....	3,083,482	5,878,896
Summer wheat.....	1,837,155	734,862
Winter rye.....	21,652,675	35,037,965
Winter barley.....	918,612	918,612
Summer barley.....	8,726,814	4,593,060
Oats.....	76,514,032	78,459,304

The stocks of summer and winter wheat at the middle of May together amounted to 9,920,637 bushels compared with 6,613,758 bushels at the same period last year. Rye stocks at the middle of May amounted to 21,652,675 bushels compared with 35,037,965 bushels last year. Stocks of winter barley are very small, but there are still 8,726,814 bushels of summer barley, which is 4,133,754 bushels more than last year. Stocks of oats, amounting to 76,514,032 bushels, are practically the same as last year. A great decline in oat stocks was again noticeable in May, but it seems likely that stocks will be carried over into the new crop year, since the prospects for feeding are not now so favourable.

The Markets Reports Bureau of the German Agricultural Council have also published figures of the stocks still available for sale on May 15th., 1932, which are given below in percentages of the total crops as compared with those on the same date of the previous year:-

	<u>Stocks available for Sale</u>	
	<u>May 15th.</u> <u>1932</u>	<u>May 15th.</u> <u>1932</u>
Winter wheat.....	3.9	2.4
Summer wheat.....	7.4	5.0
Winter rye.....	2.0	4.0
Winter barley.....	0.4	0.5
Summer barley.....	2.5	0.3

The Government Bureau of Statistics has issued the following preliminary figures of the imports of grain into Germany during May, 1932, with comparative figures for April, 1932:-

	April, 1932	May, 1932
	Bushels	
Rye.....	4,144,873	3,935,626
Wheat.....	1,869,599	1,512,419
Feeding barley.....	2,015,159	4,917,973
Other barley.....	44,553	67,426
Oats.....	28,595	33,653
Wheat flour, barrels.....	4,668	5,377
Rye flour, barrels.....	67	112

An official report on the condition of the seeds in Germany at the beginning of June stated that the warmer weather in May, combined with copious showers, proved so favourable that generally all retarded growth had been caught up. The condition of winter rye on the average was good, while winter wheat in certain districts was, however, still thin. Summer seeding had developed satisfactorily and was well advanced. Many weeds were evident. Cultivation of vegetables was practically completed. Early potatoes were well advanced and late potatoes sprouting. Satisfactory crops were expected from the first cutting of hay and clover fields.

On the basis of 2 - good; 3 - average; and 4 - poor, the crop conditions were: winter rye 2.5 (month previous 2.6); summer rye 2.8; winter wheat 2.6 (2.8); summer wheat 2.6; spelt 2.5 (2.7); winter barley 2.8(2.8); summer barley 2.5; cats 2.7; early potatoes 2.7; late potatoes 2.9; sugar beets 2.7; clover 2.6 (2.8); lucerne 2.6 (2.8); irrigated meadows 2.4 (2.9); other meadows 2.6 (3.0).

The Government Bureau of Statistics has published figures showing the areas under cultivation in Germany this year which, with the areas for the past three years for comparison, are as follows:-

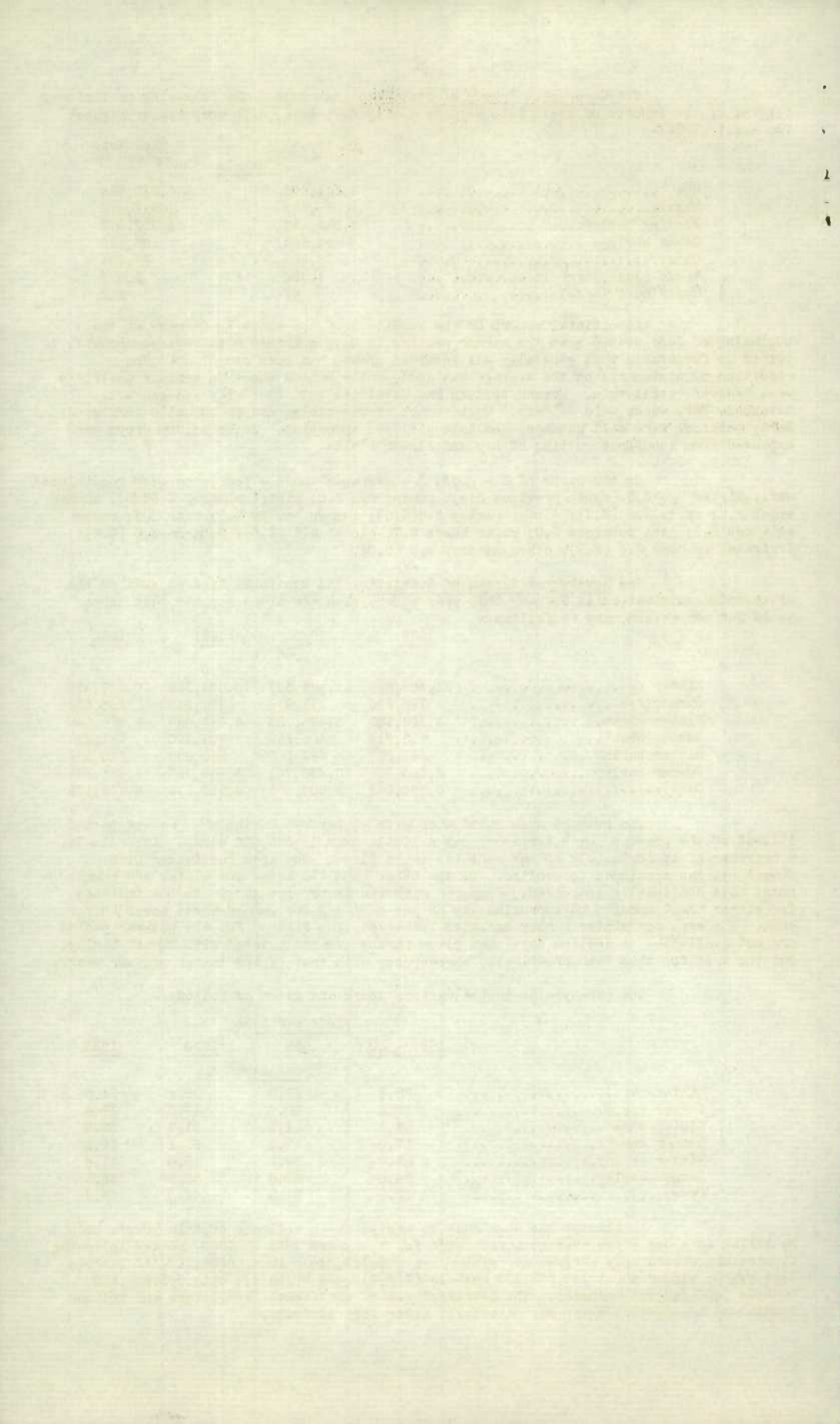
	1929	1930	1931	1932
	(Acres)			
Winter rye.....	11,485,626	11,463,337	10,608,389	10,823,374
Summer rye.....	195,216	177,918	177,918	168,034
Winter wheat.....	3,632,502	3,995,753	4,653,062	4,868,047
Summer wheat.....	323,713	405,259	701,790	751,211
Winter barley.....	447,267	486,805	560,937	610,359
Summer barley.....	3,390,335	3,266,781	3,439,757	3,261,839
Oats.....	8,794,609	8,500,550	8,310,276	8,105,175

The average area cultivated with winter rye during the pre-war period 1911-13 of the present Reich territory was a little over 12,355,450 acres. Accordingly, a decrease of approximately 20 per cent has taken place. The area cultivated with summer rye has continued to decline. On the other hand the areas for winter and summer wheat have continually increased. Compared with the latter pre-war years the increase for winter wheat amounts to approximately 35 per cent and for summer wheat about 50 per cent. The area for winter barley has also increased, but figures for the pre-war period are not available. A decline has taken place in the area cultivated with summer barley, but the area for this year practically corresponds with that of the latter pre-war years.

The acre yields in the various years are given as follows:-

	Yield per Acre			
	1924 - 30	1929	1930	1931
	Bushels			
Winter rye.....	25.3	27.6	26.1	24.5
Summer rye.....	18.6	20.7	18.8	19.4
Winter wheat.....	29.1	31.1	31.7	29.0
Summer wheat.....	17.0	32.1	31.1	29.6
Winter barley.....	42.6	39.2	45.0	41.4
Summer barley.....	34.0	37.9	33.5	33.5
Oats.....	47.2	54.3	43.0	48.5

An attempt has been made to arrive at an estimate of this year's crop by taking as a basis the average acre yields for the years 1924 to 1930 and the following figures are accordingly arrived at: winter rye 274,162,234 bushels (259,517,152 bushels last year); winter wheat 141,865,109 bushels (134,810,434 bushels); oats 382,829,530 bushels (402,347,092 bushels). The decreased use of artificial fertilisers and weather conditions are factors which may materially alter this estimate.



AUSTRIA.- The German Grain Journal states that reports from the various agricultural districts of Austria are generally favourable regarding the crop prospects at the end of June. Although barley has suffered from the long drought of past weeks, a crop above average is still expected and same may be said of oats. The wheat stand is very satisfactory, but the quality is likely to be affected by the uneven rainfalls. A record crop may be expected of rye and if the latter weeks of maturing are favourable, it is anticipated that Austria will be able to cover her own rye requirements.

CZECHOSLOVAKIA.- According to the investigations of the Government Bureau of Statistics in Prague the areas under cultivation in Czechoslovakia are as follows:-

	1931	Acres	1932
Winter wheat.....	1,962,045		1,937,335
Summer wheat.....	98,844		96,373
Rye.....	2,490,859		2,624,298
Summer barley.....	1,764,358		1,700,110
Oats.....	2,041,120		2,026,294
Late potatoes.....	1,685,283		1,695,168
Early potatoes.....	93,901		91,450

The area cultivated with rye has increased by 133,439 acres compared with last year, while the areas for the other grains have declined.

According to a report of the Czechoslovakian Ministry of Agriculture the condition of the seeds in May was very critical owing to the absence of rain. Only towards the end of the month the weather became cooler and rains set in, which had a very favourable influence on vegetation. The few rainy days, however, were not sufficient to overcome the retarded growth and reach the June 1st. standard. Where 1 - very good, 3 - average and 5 - poor, the condition of the seeds at the beginning of June was given as follows: winter wheat 3.09; summer wheat 2.83; winter rye 2.76; summer barley 2.74; oats 2.68; and sugar beets 2.86.

The German Grain Journal gives the following figures of imports of wheat, wheat flour and rye into Czechoslovakia during May compared with the previous month and May, 1931:-

	May, 1931	April, 1932	May, 1932
		Bushels	
Wheat.....	999,412	1,653,440	1,679,160
Wheat flour, barrels....	1,125	47,242	44,992
Rye.....	3,937	244,085	228,337

During the present season a total of 18,481,779 bushels of wheat (9,527,486 bushels last year); 473,545 barrels of wheat flour (1,222,668 barrels); and 8,794,923 bushels of rye (122,042 bushels) have been imported. The import requirements of wheat, which were calculated at 60,000 waggons for the crop year 1931-32, would seem to be practically covered. A further import of wheat during the last two months of the crop year would seem no longer necessary, particularly as the new crop promises to be abundant.

POLAND.- The "Gazeta Handlowa", Warsaw, at the beginning of June published a statement to the effect that sales of artificial fertilisers for the Spring operations in Poland declined a further 35 per cent and it is considered that the result will be a marked decrease in the final crop returns. At the same time there has also been a curtailment in areas under cultivation for bread grains, so that it is expected that the 1932 crop will be smaller than last year, which was already 15 per cent less than the 1930 crop.

LITHUANIA.- At a press conference on June 20th. the Lithuanian Minister of Agriculture stated that an excellent grain crop is expected in Lithuania this year, which should not be far behind the record crop of 1930. Grain prices in Lithuania are already declining, although they still remain above world market prices.

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