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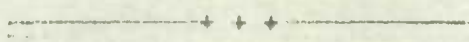
No. 9

MONTHLY REVIEW

of the

WHEAT SITUATION

JUNE 23 1932



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

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DEPARTMENT OF STATE  
WASHINGTON, D. C.

MONTHLY REVIEW

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WORLD SITUATION

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Chief, Agricultural Branch: T. W. Grindley, Ph.D.

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THE WORLD WHEAT SITUATION

In recent weeks the volume of world shipments of wheat and wheat flour has decreased from the levels established during April and May. In addition, the volume of weekly shipments has not been as large as during the corresponding weeks in 1931, with the result that total world shipments during the present crop year are now on a level with the volume of 1930-31. Total world shipments of wheat and wheat flour from August 1st, 1931 to June 18th, 1932 amounted to 712 million bushels compared with 712 million bushels for the same period in 1930-31. While world shipments have been below the average for the crop year to date, North American shipments have been well maintained during the past three weeks, accounting for about 55 per cent of total world shipments. This situation reflects the increased demand for North American wheat as a result of the falling-off in shipments from Australia and the Argentine, and the complete disappearance of Russia as a factor in wheat trade during the past two months. Canadian export clearances have been relatively high to date in June, clearly showing that Canada has been enjoying a large share of the export trade in wheat from North America.

- THE SOUTHERN HEMISPHERE -

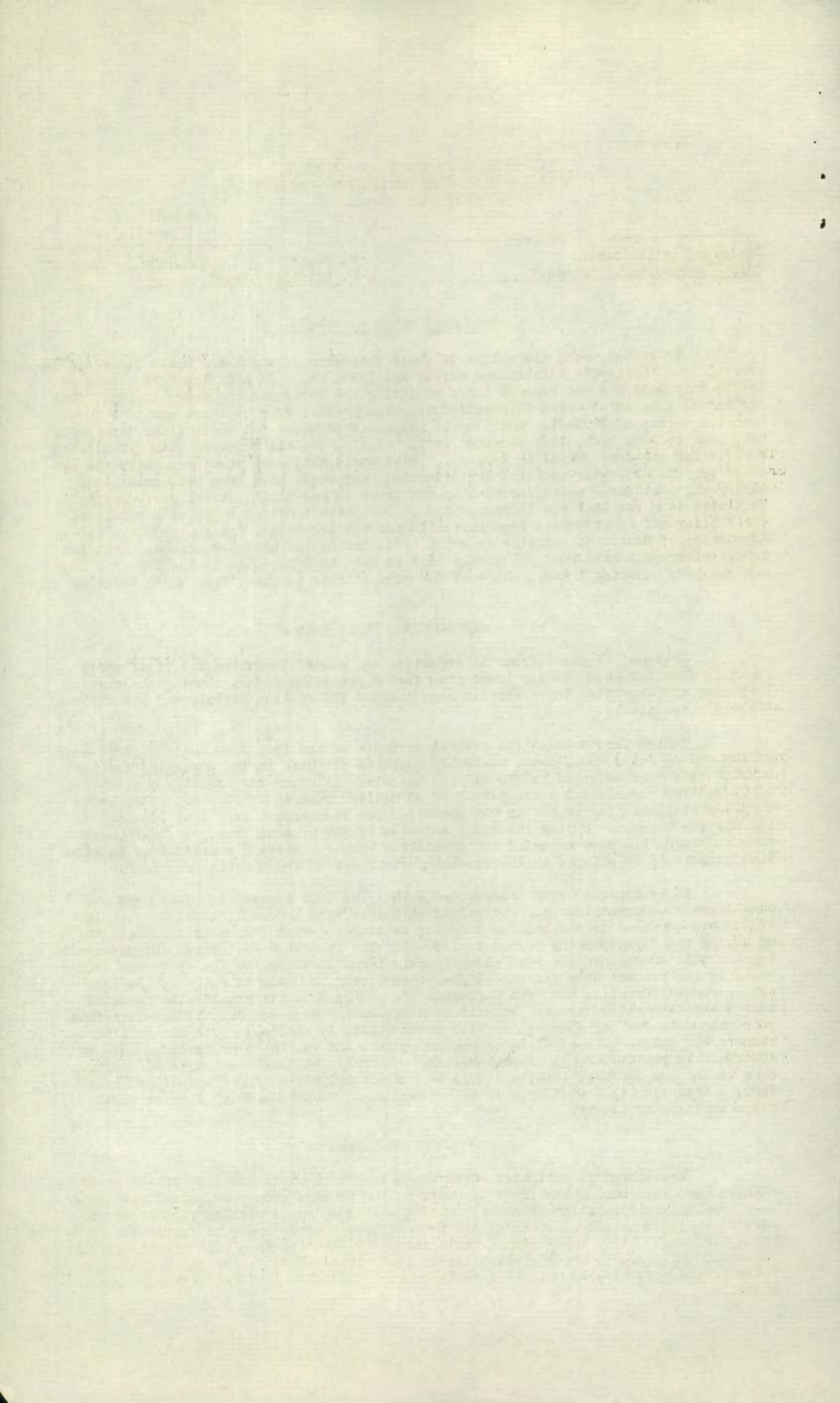
Movement of wheat from the Argentine and Australia during the first three weeks in June has been sharply lower than during preceding weeks. During the present crop year the Argentine and Australia have shipped 132 million bushels and 142 million bushels respectively.

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 46 weeks of the present crop year, shipments from the Argentine have amounted to 132 million bushels, leaving a balance of 14 million bushels to be shipped in the remaining six weeks of the present crop year.

It is apparent from trade figures that the 1931 Australian wheat crop was considerably under-estimated. Australian shipments from August 1, 1931, to June 18, 1932, have amounted to 142 million bushels, as compared with 135 million bushels shipped during the corresponding period in 1930-31. The fact that Australian shipments during the fall months of 1931 were exceptionally large accounts for the fact that shipments in the present crop year are higher than during 1930-31, in spite of the fact that a somewhat smaller crop was harvested six months ago. It should also be noted that Australian shipments were relatively heavy during June and July 1931, while this year shipments for the same months will be considerably smaller. With due consideration to the volume of Australian shipments to date and to the large trade enjoyed by Australia in the Orient, it is probable that Australia will have a very small carry-over at the end of July, 1932, and will be a light shipper during the fall months of 1932, a situation that will work to the advantage of countries which harvest their crops in July and August.

- IMPORT REQUIREMENTS -

Mr. Broomhall estimates world wheat import requirements for 1931-32 at 776 million bushels. During the first 46 weeks of the present crop year, world shipments have amounted to 712 million bushels, leaving a balance of 64 million bushels to come forward in the remaining 6 weeks of the present crop year in order to fulfil the foregoing estimate. Since last August, world shipments have averaged 15.4 million bushels per week, while average weekly shipments of 10.7 million bushels for the remaining 6 weeks of the present crop year will satisfy Mr. Broomhall's estimate of import requirements.





- WINTER WHEAT IN THE UNITED STATES -

On June 9th, the United States Department of Agriculture issued a crop report dealing with conditions in the winter wheat area. The report states:

"A winter wheat crop of 410,669,000 bushels is indicated by the June 1 condition. This is 30,000,000 bushels, or 6.9 per cent less than indicated on May 1. The decrease occurred principally in Nebraska, Kansas and Oklahoma, where the prospective yield was further reduced by continued deficient moisture, temperatures above average and the damage from Hessian Fly. A crop of 410,669,000 bushels would be 48 per cent less than the record crop of 787,465,000 bushels in 1931 and 25 per cent less than the average annual production of 548,632,000 bushels for the 5 year period, 1924 to 1928.

The condition of winter wheat on June 1 was 64.7 per cent compared with a 10-year average condition of 77.2 per cent. Average yield per acre is indicated at 12.7 bushels on the acreage as of May 1, compared with 19.2 bushels in 1931 and the 10-year average of 14.8 bushels. Further abandonment of winter wheat which occurred subsequent to the estimate of acreage left for harvest on May 1, is reflected in the reported condition figure and the indicated yield."

The development of the United States winter wheat crop has been consistently unsatisfactory from a production standpoint; prospects have receded consistently since the crop was first sown in the fall of 1931. Three successive monthly reports issued by the United States Department of Agriculture since the first of April have shown progressive declines, both in the condition of the crop and in estimated production. As shown above, the June 9th report indicates a reduction in the United States winter wheat crop of 376 million bushels, compared with last year. This tremendous reduction will be an important factor in tending to cause a reduced production of wheat in the world in 1932 as compared with 1931.

- RUSSIA -

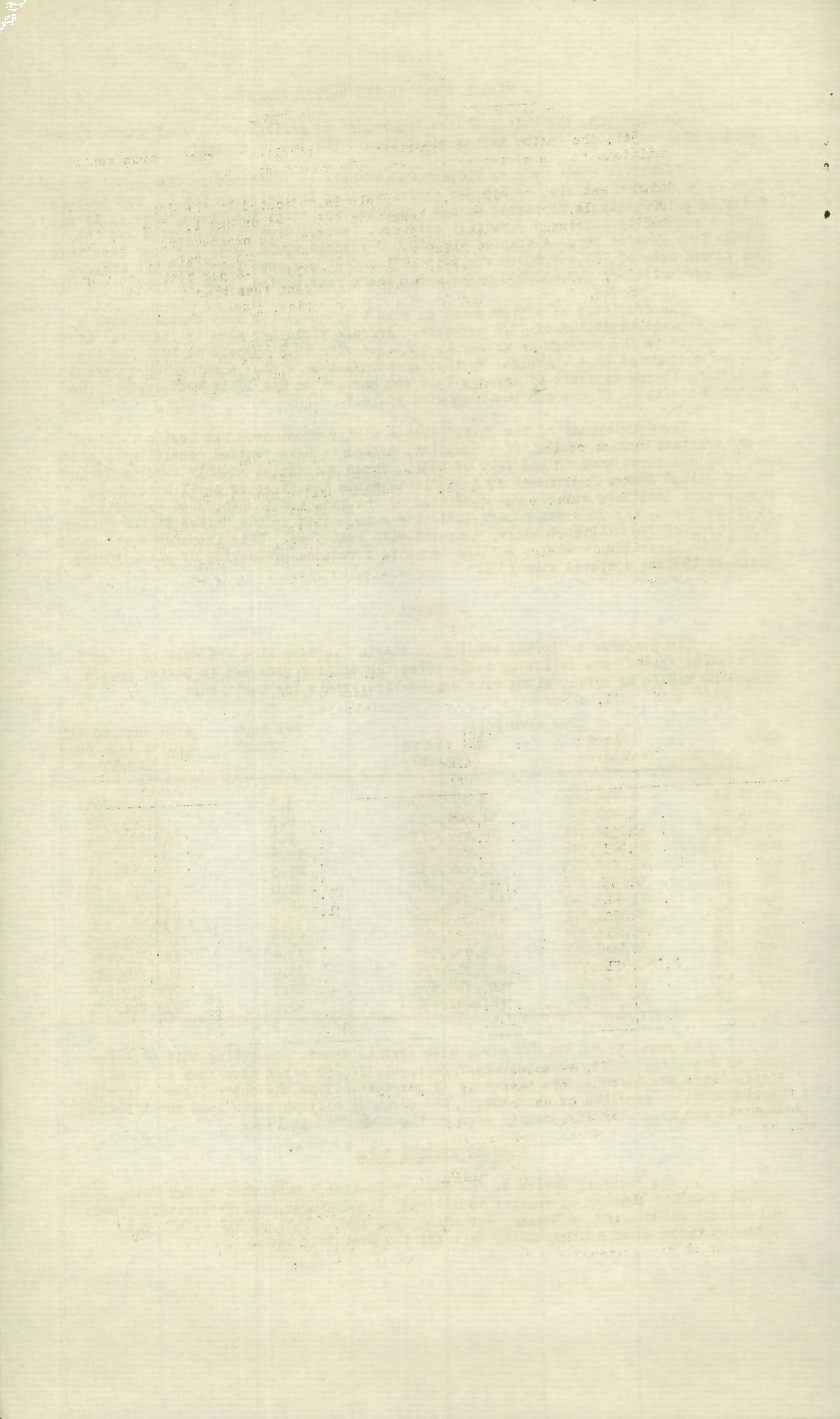
The progress in spring seeding in Russia has been slow and most retarded in the case of wheat. The following table shows the seeding progress in Soviet Russia since the middle of April, along with comparative totals for last year:

Date	Area sown to:		Per cent "Plan"	Area sown to all grains last year (Acres)
	Wheat (Acres)	All grains (Acres)		
April 15	4,495,400	8,294,260	3.3	3,692,650
April 20	6,402,290	15,921,233	6.3	8,201,548
April 25	10,339,041	24,696,073	9.8	16,793,528
May 1	15,293,576	37,007,044	14.6	33,735,321
May 5	22,882,293	53,462,032	21.0	60,682,557
May 10	32,536,842	78,400,272	31.0	88,366,178
May 15	41,513,290	108,239,070	42.7	114,032,490
May 20	44,210,271	135,313,492	53.5	139,868,636
May 25	48,003,394	160,153,813	63.3	163,984,003
May 31	50,808,081	185,057,934	73.4	186,320,186
June 5	52,046,098	203,709,246	80.5	208,480,921
June 10	52,881,326	216,714,593	85.7	221,409,684
June 15	53,375,544	227,241,436	90.0	229,811,370

On June 15, 53,375,544 acres were sown to wheat, completing only 82.9 per cent of the plan; on the same date last year, 61,777,250 acres were sown to wheat, and the plan completed to the extent of 89 per cent. From the above figures it will be seen that on the 15th of June Russia had about 8½ million acres less wheat actually sown, as compared with the acreage sown on the same date in 1931.

RUSSIAN WEATHER DATA

In the "Monthly Review of the Wheat Situation," published on May 26th, 1932, appears a weekly summary of weather conditions, temperatures, and precipitation over the various wheat areas of Russia, extending from April 21st, to May 19th. The following table shows corresponding data for the past four weeks:





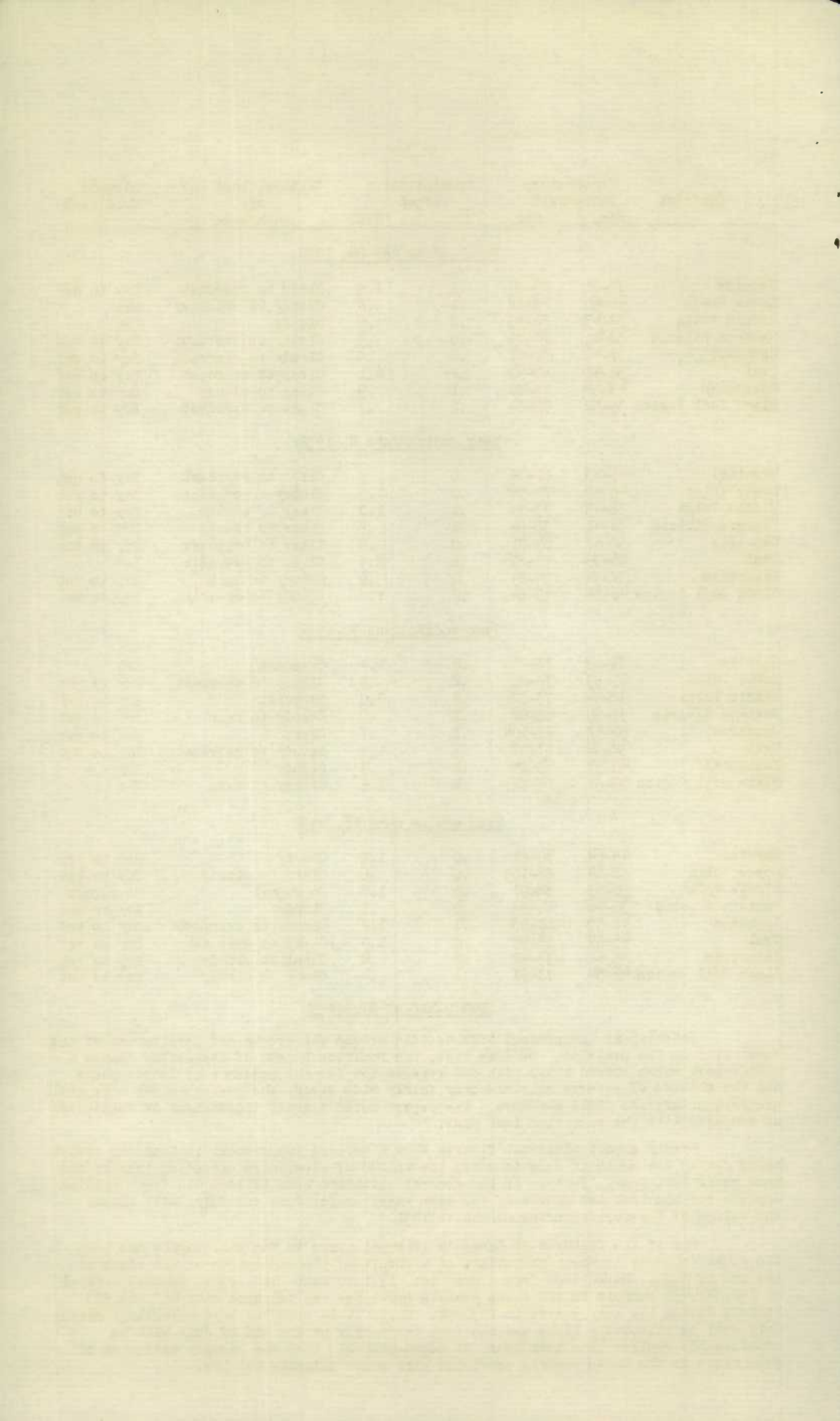
District	Temperature		Precipitation		Weather, last day of each week	Ground Condition
	Fahrenheit		Inches			
	Min.	Max.	Min.	Max.		
<u>Week ending May 26, 1932</u>						
Ukraine	37-61	79-84	.1	1.5	Clear to overcast	Dry to wet
Lower Volga	41-50	73-88	.1	.6	Cloudy to overcast	Dry
Middle Volga	32-43	72-75	.0	.8	Cloudy	Dry
Western Siberia	32-41	72-79	.0	.5	Cloudy to overcast	Dry to wet
Caucasus	37-46	72-81	.2	.5	Cloudy to overcast	Dry to wet
Ural	30-41	61-90	.2	2.1	Clear to overcast	Dry to wet
Kazakstan	43-54	75-86	.1	.9	Clear to cloudy	Dry to wet
Black Soil Region	39-52	70-84	.2	.7	Clear to overcast	Dry to wet
<u>Week ending June 2, 1932</u>						
Ukraine	45-63	61-82	.0	.9	Clear to overcast	Dry to wet
Lower Volga	45-59	79-99	.0	1.6	Cloudy to overcast	Dry to wet
Middle Volga	36-45	73-80	.1	1.0	Clear to cloudy	Dry to wet
Western Siberia	32-41	52-84	.1	.8	Clear to cloudy	Dry to wet
Caucasus	32-57	64-91	.0	.8	Clear to overcast	Dry to wet
Ural	26-39	57-81	.1	2.9	Clear to overcast	Wet
Kazakstan	37-54	54-84	.0	.9	Cloudy to rain	Dry to wet
Black Soil Region	46-54	79-84	.2	1.8	Cloudy to overcast	Dry to wet
<u>Week ending June 9, 1932</u>						
Ukraine	34-63	72-86	.2	1.4	Overcast	Wet
Lower Volga	45-59	75-86	.2	.9	Cloudy to overcast	Dry to wet
Middle Volga	32-54	73-82	.2	2.0	Overcast	Dry to wet
Western Siberia	37-50	63-82	.1	.6	Cloudy to rain	Dry to wet
Caucasus	50-58	77-104	.1	.7	Clear	Dry to wet
Ural	32-52	57-97	.1	1.7	Cloudy to overcast	Dry to wet
Kazakstan	43-57	79-84	.1	.3	Cloudy	Dry
Black Soil Region	39-57	68-82	.2	1.5	Cloudy to rain	Wet
<u>Week ending June 16, 1932</u>						
Ukraine	45-64	70-81	.0	1.5	Cloudy	Dry to wet
Lower Volga	52-64	86-100	.0	.6	Clear to cloudy	Dry to wet
Middle Volga	50-63	82-97	.0	1.2	No report	No report
Western Siberia	36-46	84-93	.0	.7	Cloudy	Dry to wet
Caucasus	46-59	61-93	.1	1.7	Cloudy to overcast	Dry to wet
Ural	45-59	55-95	.0	1.5	Clear to overcast	Dry to wet
Kazakstan	55-66	93-97	.0	.2	Clear to cloudy	Dry to wet
Black Soil Region	46-54	77-91	.1	.4	Clear to cloudy	Dry to wet

#### THE CANADIAN SITUATION

Interest at the present time centers around the growth and development of the wheat crop on the prairies. On June 21st, the Dominion Bureau of Statistics issued a crop report which showed that, with due reservation for the presence of insect pests and the absence of reserve moisture over fairly wide areas, the western wheat crop still promises an average yield per acre. The report noted a great improvement in conditions as compared with the same time last year.

Weekly export clearance figures show a decided improvement in Canadian export trade during the month of June to date, the volume of clearances exceeding that of the same weeks last year. Factors in the general situation seem to indicate that Canadian exports for the last two months of the crop year, or for June and July, will exceed the volume of the corresponding months in 1931.

One of the features of Canada's internal trade in the past months has been the great increase in wheat marketings as a result of the expiration of the bonus at the end of June. Marketings from August 1st, 1931 to June 10th, 1932, reached a total of 252,871,434 bushels in the three prairie provinces, as compared with 297,463,523 bushels during the same period in 1930-31. While it is expected that marketings during July will be relatively light and the farm carry-over at the end of July will be considerably smaller than last year, it seems probable that the January estimates of production in the three prairie provinces will prove slightly too low.





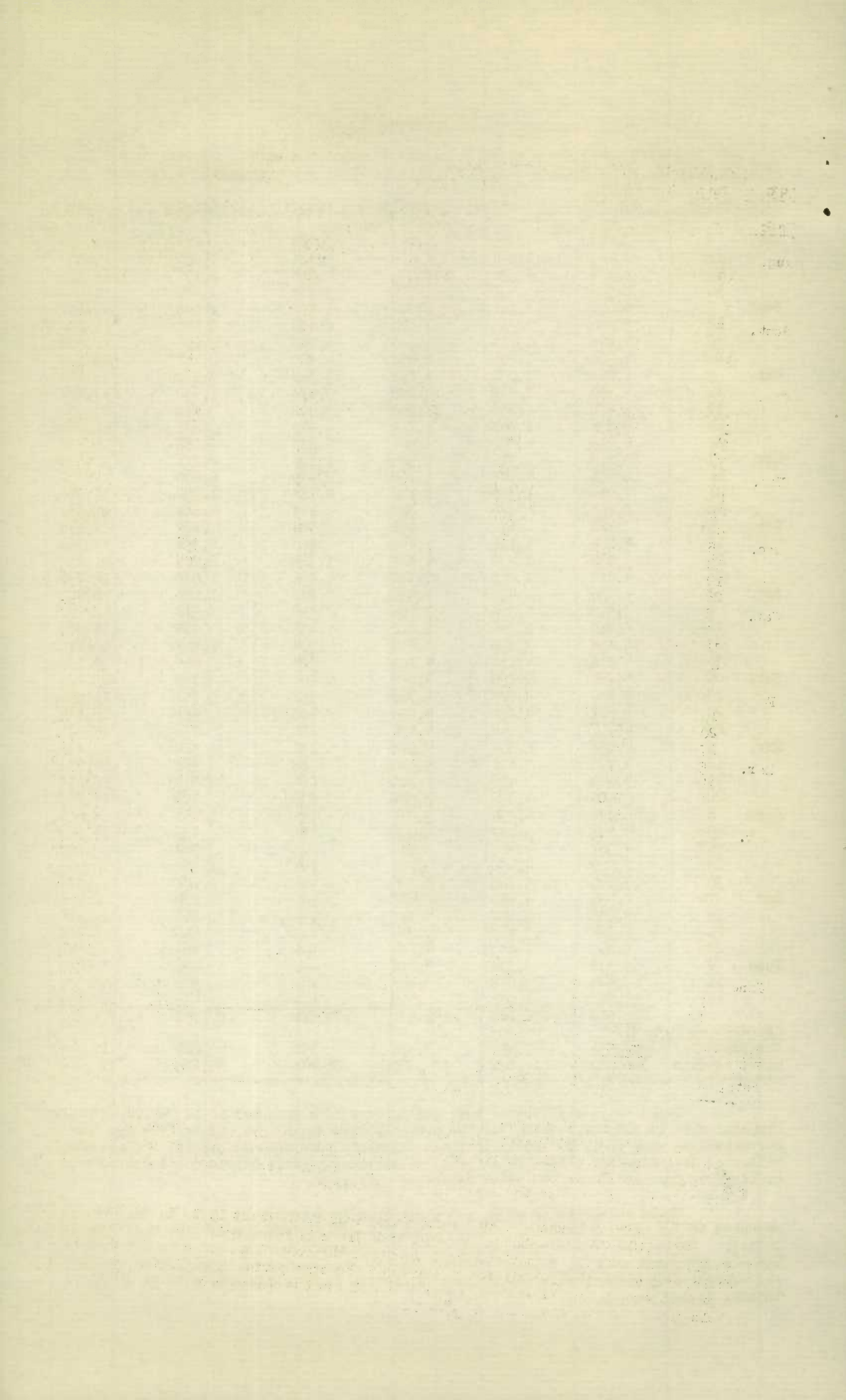
International Trade

The following table shows world shipments of wheat and wheat flour from August 1st, 1931 to June 12, 1932, with comparative totals for last year (Broomhall's figures)

Week ending	North					Other	Total
	America	Argentina	Australia	Russia			
(Thousand Bushels)							
Aug. 8	7,888	1,240	2,144	3,030	1,208	15,560	
15	4,296	1,104	1,576	3,484	1,836	13,336	
22	5,648	1,352	2,096	4,618	2,176	15,890	
29	5,520	1,532	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	1,268	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	3,268	15,248	
10	8,720	1,848	2,192	3,072	1,632	17,464	
17	5,776	1,200	2,000	3,408	3,888	16,272	
24	8,632	1,048	1,722	4,040	3,632	19,074	
31	6,912	1,472	944	2,038	3,168	14,534	
Nov. 7	10,816	1,912	2,656	1,160	2,216	18,760	
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	924	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	5,356	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	736	15,776	
13	5,240	4,024	5,728	352	752	16,096	
20	5,672	4,232	4,504	408	488	15,304	
27	4,416	5,144	4,872	172	776	15,320	
Mar. 5	4,536	6,344	4,372	136	584	16,472	
12	4,736	7,112	5,120	88	920	17,976	
19	4,040	7,016	4,320	264	548	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	---	816	18,616	
21	6,384	3,944	4,744	---	696	15,768	
28	5,560	2,040	4,184	---	664	13,448	
June 4	8,352	3,024	3,016	---	496	14,888	
11	7,374	3,646	3,228	---	500	14,708	
18	7,984	2,071	2,396	---	488	13,939	
	296,510	132,128	141,501	70,726	70,752	712,637	
Comparative 1930-31							
Corresponding week	7,536	5,496	3,512	176	624	17,344	
Total to date	320,020	110,891	134,720	91,048	55,625	712,304	

World shipments for the week ending June 18th amounted to 12,939,000 bushels, compared with 14,708,000 bushels for the previous week and 17,344,000 bushels for the corresponding week in 1931. North American shipments were well maintained for the week, while the Argentine and Australia shipped smaller quantities. Russia continued to take an inactive part as far as the wheat market is concerned.

World shipments of wheat and wheat flour from August 1, 1931, to June 18, 1932, amounted to 712 million bushels, compared with 712 million bushels for the same week in 1930-31. During the same period, North American shipments have amounted to 297 million bushels, compared with 320 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.





Import Requirement Estimate

Mr. Broomhall estimates world wheat import requirements for 1931-32 at 776 million bushels. The position of this estimate on June 18th, 1932, is shown in the following table:-

Import Requirements Aug. 1, 1931 to July 31, 1932 (52 weeks)	Actual Shipments Aug. 1, 1931 to June 18, 1932 (46 weeks)	Balance to be Shipped June 18, 1932 to July 31, 1932 (6 weeks)
776,000,000 Bushels or 14,923,000 Bushels Weekly	711,617,000 Bushels or 15,470,000 Bushels Weekly	64,383,000 Bushels or 10,730,000 Bushels Weekly

According to the above estimate there is a balance of 64 million bushels to be shipped in the last 6 weeks of the present crop year, or an average of 10,730,000 bushels per week compared with weekly average shipments of 15,470,000 bushels for the preceding 46 weeks.

The Course of Wheat Prices

The following summary of wheat price movements from May 1st to June 21st, has been prepared by the Internal Trade Branch of the Dominion Bureau of Statistics.

The direction of wheat prices for the greater part of May was broadly upward. In the early part of the month exports as reflected by North American shipments were very large, and weather conditions in the United States winter wheat area were decidedly bullish. Exports dropped appreciably, however, as the month progressed, and in the closing days, rains improved winter wheat prospects. Prices in accordance with this change, turned downwards, and in the first week of June the decline became very pronounced. Renewed support from export interests helped to steady the market, but weakness continued to be apparent for the balance of the period under review. Generally favourable growing conditions for spring wheat in the west, and pressure from Canadian offerings were cited as influences contributing to the June reaction.

The range of cash closing quotations for No. 1 Manitoba Northern wheat, Fort William and Port Arthur basis, between May 1st and June 21st was 10.5¢, the highest price being 64.4¢ on May 11th and 25th, and the lowest 53.9¢ per bushel on June 14th and 18th. The average price for May was 62.9¢ as compared with 62.6¢ for April. The close on June 21st was 54.1¢ as compared with 64.0¢ per bushel on May 21st.

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	1.57.5	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	1.48.1	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	--
July	1.59.6	1.58.3	1.30.9	1.59.9	.95.1	.57.3	--

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THE CANADIAN SITUATION.

Crop Conditions in the Prairie Provinces. With necessary reservations because of the presence of insect pests in dangerous numbers and because of the absence of reserve moisture over wide areas, the western wheat crop still promises an average yield per acre.

The Bureau's report of June 9 revealed the following condition figures of spring wheat for the three provinces at May 31, 1930, 1931 and 1932:

	<u>1930</u>	<u>1931</u>	<u>1932</u>
Manitoba	93	84	93
Saskatchewan	97	77	92
Alberta	99	84	102

The outstanding feature is the great improvement in condition compared with last year. This fact is accentuated by the further consideration that there was a decline in condition during June, 1931, while the tendency has been in the other direction this year.

At May 31, the district crop conditions still showed the effects of three years of drought. Although an absolute recovery was very evident, the promise was relatively lower in about the same wheat areas which have suffered from drought in the past three years. The wheatlands in south-central Saskatchewan, in particular, have not yet recovered from previous drought. Crop Districts 2, 3 and 6 of Saskatchewan showed the lowest condition, but with the exception of two Crop Districts, all of Manitoba and Saskatchewan was below average in promised yield. In contrast, all the important wheat-producing districts of Alberta had condition figures of 100 or higher, the best prospects being in Crop Districts 3, 4 and 6.

During the first three weeks of June, there has been a further appreciable improvement in crop prospects. Only limited areas in south-western Manitoba, southeastern Saskatchewan and in the Peace River district of Alberta report lack of rain at present. In the second week of June, exceptionally heavy rains covered the main wheat areas, while the precipitation of last week was of benefit in the park belt.

Although strong and hot winds have prevailed for short periods, soil-drifting has been very slight this year as compared with 1930 and 1931. The wheat now covers the ground so that damage cannot be extensive. Over most of southern and central Manitoba and Saskatchewan, the wheat is in the shot blade, with earlier fields headed. In Alberta, the wheat has generally just finished stooling.

Outworm and Grasshopper Situation.— The damage caused by these pests to date has not been as serious as expected but the full danger is not yet past. Strenuous control measures and the wet weather have combined to reduce damage from grasshoppers. The eggs are still hatching, however, and since the early-hatched insects are now in the migratory stage, the probability of further damage is still a matter of concern. The outbreak has been most severe in Manitoba, but campaigns for the distribution of poison bait had to be organized in Saskatchewan and Alberta also.

Outworm damage so far has been confined to gardens and to relatively limited areas where wheat has been attacked. Weed growth has been very heavy this year and has provided food for the outworms. In addition, the wet soil has hindered the worms and caused rapid growth of wheat. The likelihood of damage from this pest in epidemic proportions is now practically past for this year.

Plant Diseases. From the reports of plant pathologists, it is observed that the present wheat crop is relatively free of root and foot rot diseases. This is probably a product of the favourable soil conditions following germination. In most areas, the wheat established a strong and healthy root system.

Browning root rot is reported as likely to cause moderate to severe injury in the Scott and Ferdue districts of northwestern Saskatchewan.





Hail Damage.— As an accompaniment to the storms of the second and third weeks of June, hail fell in scattered localities of Manitoba and Alberta. Damage was limited because of the stage of growth.

Fall Wheat.— The condition of fall wheat in Canada at May 31, was given as 100 per cent of the long-time average yield per acre as compared with 97 and 91 at the same dates of 1931 and 1930 respectively. The crop is particularly promising in the main producing area of southern Ontario, where it entered the winter with a heavy top and maintained its good prospect through a somewhat unfavourable winter and early spring. Recent weather conditions have been much more favourable so that, given a few good rains at falling time, an average yield is assured. The Canadian acreage, estimated at 496,500, is over 11 per cent below that of 1931. Lack of moisture reduced prospects in Alberta but the condition figure of 93 at May 31, with recent heavy rainfall will assure a crop approaching an average yield.

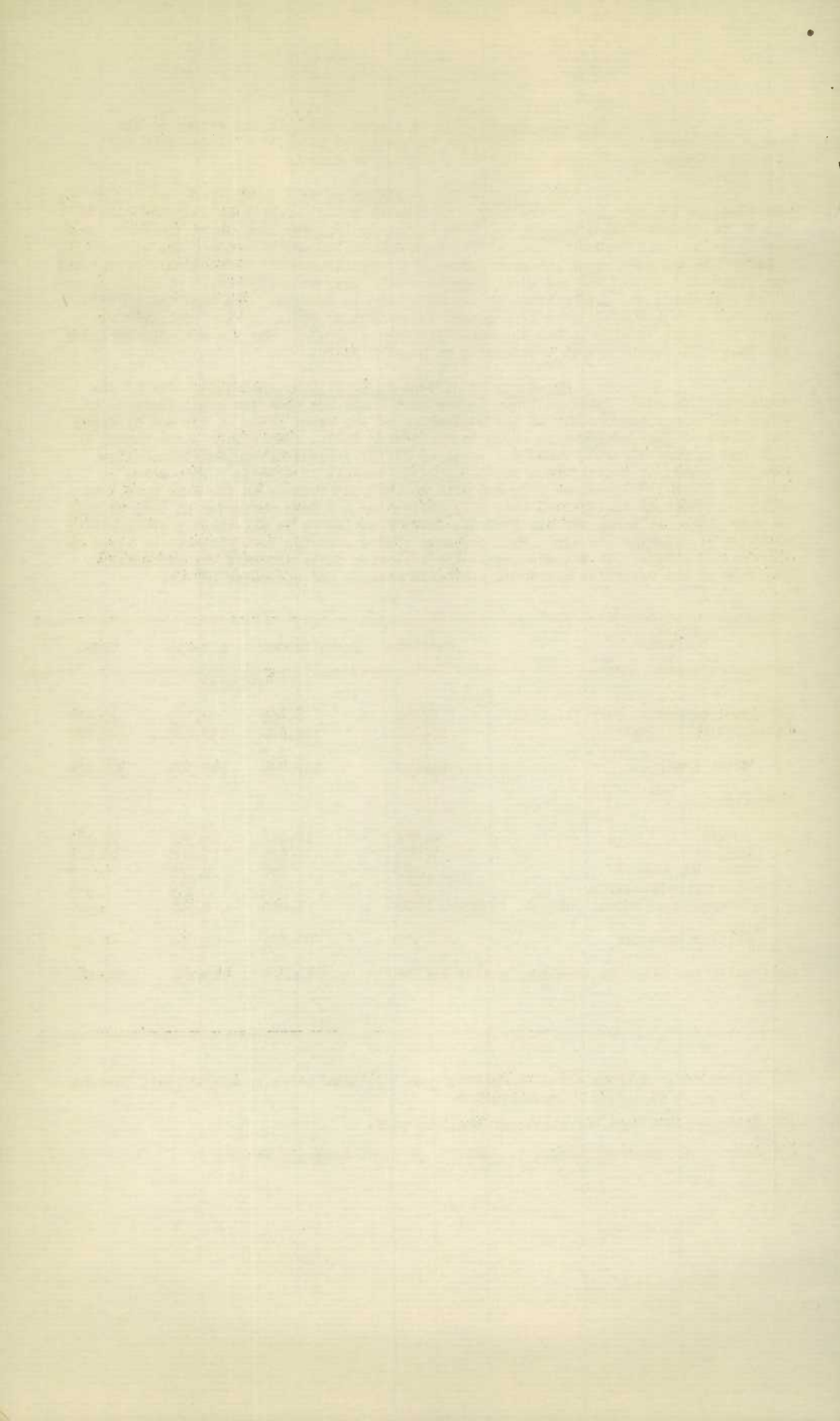
The Position of Western Wheat Crop Estimates.— One of the features of Canada's internal trade in the past month has been the great increase in wheat marketings as a result of the expiration of the wheat bonus at the end of June. The extent of this movement is shown in a following table. Marketings since August 1, 1931 had on June 10, 1932 reached a total of 23,787,730 bushels in Manitoba, 113,224,353 bushels in Saskatchewan and 115,859,351 bushels in Alberta. This makes a total of 252,871,434 bushels compared with 297,463,523 bushels in the same period of 1930-31. While it is expected that July deliveries and farm carryover at July 31 will be very light, it seems certain that the January estimates in all three provinces will prove to be slightly too low. The necessary upward revision will probably be least in Alberta and greatest in Saskatchewan. The following table presents the statistical position of the estimates as far as available records and estimates permit.

Item	Manitoba	Saskatchewan	Alberta	Total
	(000 bushels)			
Carryover on farms, July 31, 1931	2,042	6,459	9,303	17,804
January crop estimate	27,000	121,000	136,000	284,000
<b>Total Available</b>	<b>29,042</b>	<b>127,459</b>	<b>145,303</b>	<b>301,804</b>
<b>Disposition:</b>				
Seed (1)	2,328	12,276	11,565	26,169
Feed	3,240	7,623	13,600	24,463
Unmerchantable	270	847	1,360	2,477
Country Millings (2)	375	540	635	1,550
Carryover on farms, July 31, 1932	400	1,600	2,500	4,500
<b>Total Allowances</b>	<b>6,613</b>	<b>22,886</b>	<b>29,660</b>	<b>59,159</b>
Deliveries and Platform Loadings to date (3)	23,788	113,224	115,859	252,871

(1) Allows for 1 million acres in Manitoba and 6 million acres in Saskatchewan drought areas to be seeded from deliveries.

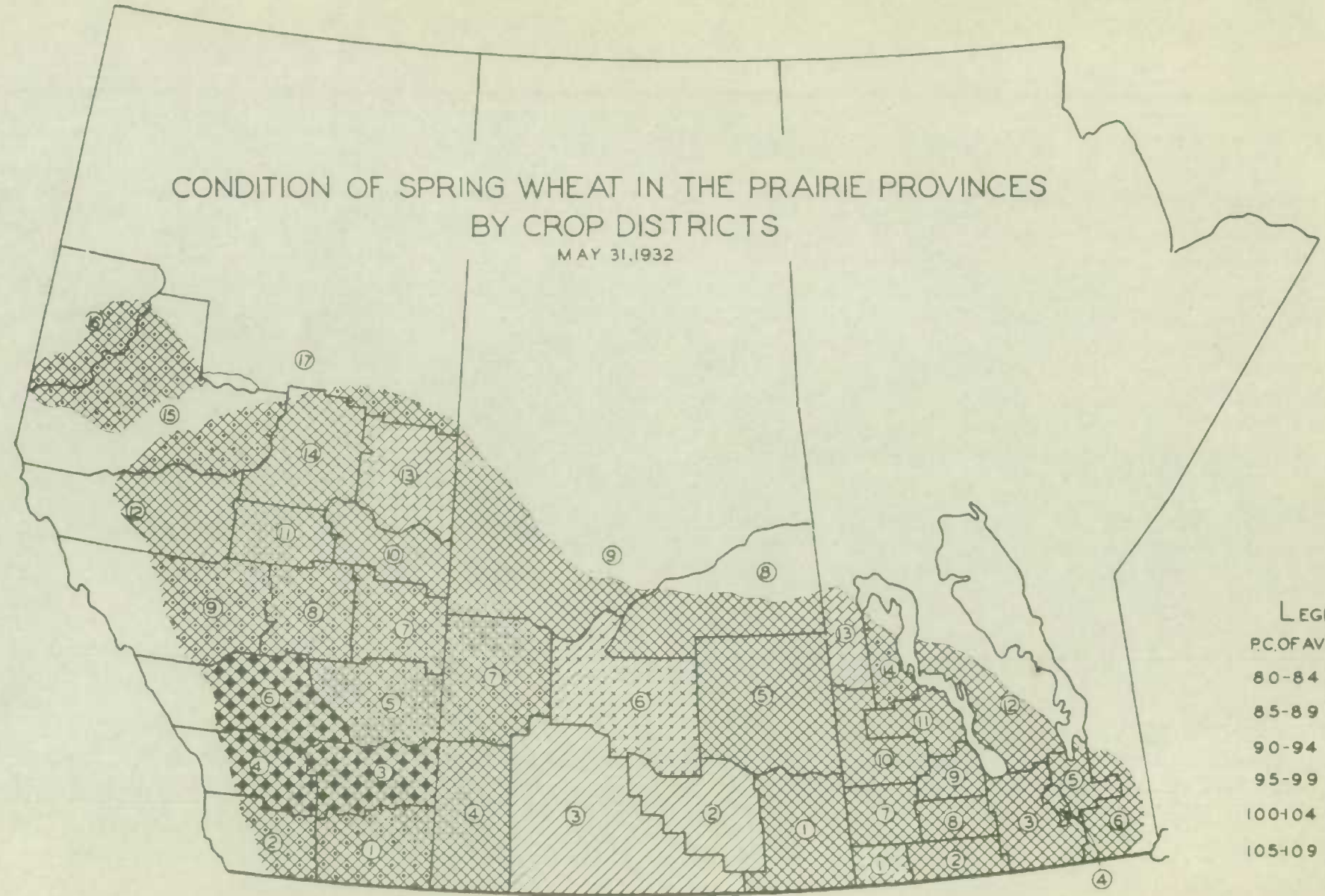
(2) Estimated for last two months of the crop year.

(3) Country elevator deliveries to June 10, platform loadings to June 7.





CONDITION OF SPRING WHEAT IN THE PRAIRIE PROVINCES  
 BY CROP DISTRICTS  
 MAY 31, 1932







Lake Movement.-- The movement of wheat from the Head of the Lakes for the period from the opening of Navigation to June 14, 1932 amounted to 30,690,107 bushels, of which 16,595,922 bushels were shipped to Canadian Lower Lake ports, 9,924,986 bushels direct to Montreal, 2,758,724 bushels to Buffalo, 146,500 bushels to other United States Lake ports, 1,201,491 bushels to Sorel and 62,482 bushels to Quebec. The outstanding features so far this season have been the reduced amounts destined to Buffalo and other United States Lake ports and the large direct shipments to Montreal and Sorel. In addition, considerable quantities were lightered through at Port Colborne, Prescott and Kingston for the St. Lawrence ports. There have also been reduced amounts going to Lake Huron and Georgian Bay Ports. Vessel shipments by weeks were as follows:--

	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	-
<b>T O T A L</b>	16,595,922	9,924,986	2,758,724	146,500	1,201,491	62,482

Owing to the season of Navigation opening earlier in 1931, the movement of wheat from the Head of the Lakes was greater than for the period up to June 14, 1932. The distribution last year was as follows:-- to Lower Lake ports, 20,917,207 bushels; to Buffalo, 18,838,680 bushels; to Montreal, 5,224,793 bushels; to Sorel 94,000; and to Quebec 12,131 bushels.

Lake freight rates have been the lowest in years especially the rate to Montreal, which has been quoted as low as 4 cents.





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 June 10th, 1932, with comparative totals for last year.

<u>Week Ending</u>	<u>Manitoba</u>	<u>Saskatchewan</u>	<u>Alberta</u>	<u>Total</u>	<u>Total Last Year</u>
( B U S H E L S )					
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	7,468,536	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	1,450,235	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

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T O T A L S    23,787,730            113,224,353            115,859,351            252,871,434            297,463,523

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Account No. 1000

Branch No. 1000

Date: 10/10/1910

Date	Particulars	Debit	Credit	Balance	Rate
10/10/10	By Balance b/d		1000.00	1000.00	
10/11/10	To Cash	50.00		950.00	
10/12/10	By Cash		25.00	975.00	
10/13/10	To Cash	75.00		900.00	
10/14/10	By Cash		100.00	1000.00	
10/15/10	To Cash	125.00		875.00	
10/16/10	By Cash		150.00	1025.00	
10/17/10	To Cash	175.00		850.00	
10/18/10	By Cash		200.00	1050.00	
10/19/10	To Cash	225.00		825.00	
10/20/10	By Cash		250.00	1075.00	
10/21/10	To Cash	275.00		800.00	
10/22/10	By Cash		300.00	1100.00	
10/23/10	To Cash	325.00		775.00	
10/24/10	By Cash		350.00	1125.00	
10/25/10	To Cash	375.00		750.00	
10/26/10	By Cash		400.00	1150.00	
10/27/10	To Cash	425.00		725.00	
10/28/10	By Cash		450.00	1175.00	
10/29/10	To Cash	475.00		700.00	
10/30/10	By Cash		500.00	1200.00	
10/31/10	To Cash	525.00		675.00	
	<b>Total</b>	<b>4500.00</b>	<b>4500.00</b>		

Signature: \_\_\_\_\_



Export Clearances of wheat.

The following table shows export clearances of wheat (not including wheat flour) from various ports, by weeks, August 1st, 1931 to June 17, 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	-	684,765	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	-	1,713,171	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	4,111,733(3)
17	2,201,563	-	32,023	-	1,877,484	997,000	5,108,070
<b>TOTALS</b>	<b>43,517,856</b>	<b>2,017,008</b>	<b>5,638,092</b>	<b>77,111</b>	<b>68,637,013</b>	<b>29,372,000</b>	<b>150,116,175</b>

- (1) Includes shipment of 88,326 bushels from Quebec.
- (2) Includes shipment of 544,769 bushels from Churchill.
- (3) Includes shipment of 224,000 bushels from Victoria, B.C.





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>June 17, 1932.</u>	(Bushels)
Western Country Elevators	50,519,922
Interior Terminal Elevators	118,976
Vancouver Elevators	8,011,514
Victoria Elevators	337,349
Prince Rupert Elevators	1,157,853
Churchill Elevators	1,564,568
Fort William and Port Arthur Elevators	44,898,473
Interior Private and Mill Elevators	6,373,047
In Transit, Lakes	4,866,290
Eastern Elevators - Lake Ports	6,964,950
Eastern Elevators - Sbd. Ports	7,274,966
U. S. Lake Ports	1,475,634
U. S. Atlantic Seaboard Ports	2,021,438
<b>T O T A L</b>	<b>135,584,980</b>
Week ending May 13, 1932	156,903,715
Week ending April 29, 1932	164,269,592
Week ending June 19, 1931	115,325,611
Week ending May 1, 1931	155,863,930

From the above table, it may be observed that at June 17, 1932 the visible supply of Canadian wheat was 135,584,980 bushels compared with only 115,325,611 bushels. These figures, however, are a little misleading. Stocks in transit on the Lakes are included in the visible this year but not last year. This would reduce the 20 million bushel average by nearly 5 million bushels. Again, the visible supply has been greatly augmented this year by the rush of June deliveries before the expiration of the bonus. In the period from June 12 to July 31, 1931, over 9½ million bushels were delivered by western farmers. Such a volume is not likely to be reached this year. At July 31, 1931, western farmers held 17.8 million bushels of wheat on their farms. This figure also will be greatly reduced at July 31, 1932 because of the bonus. Thus the total supply position gives a much more accurate comparison of existing stocks than the visible statements.

In the past month, there was a large decrease in wheat stocks held at the country elevators, with lesser decreases at the Head of the Lakes and in United States ports. The stocks held at eastern lake and seaboard ports and at Vancouver increased slightly. Holdings of about 1½ million bushels are shown at Churchill on Hudson Bay.

Overseas Movement.-

The following table shows Canadian exports of wheat and wheat flour 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	-	22,989,542	21,679,434	25,750,989
July	-	14,106,169	22,833,051	21,781,964
<b>T O T A L S</b>	-	<b>258,637,887</b>	<b>186,267,212</b>	<b>308,853,540</b>

The export totals for May were disappointing, being much below those for the same month of 1931. The exports in the ten months ending May 31 amounted to 166,975,224 bushels compared with 221,542,175 bushels in the corresponding period of 1930-31. The months of June and July are regarded more hopefully. Clearances from the seaboard have been higher than those of last year in the elapsed period of June.

Stocks of 1910 (with 1909 figures) - 1910

Year	1909	1910
1909	100	100
1910	100	100
1911	100	100
1912	100	100
1913	100	100
1914	100	100
1915	100	100
1916	100	100
1917	100	100
1918	100	100
1919	100	100
1920	100	100
1921	100	100
1922	100	100
1923	100	100
1924	100	100
1925	100	100
1926	100	100
1927	100	100
1928	100	100
1929	100	100
1930	100	100

The following table shows the percentage change in the value of stocks from 1909 to 1930. The value of stocks in 1909 is taken as 100. The percentage change is calculated as follows:  $\frac{\text{Value in Year} - 100}{100} \times 100$ .

1910: 100%  
 1911: 100%  
 1912: 100%  
 1913: 100%  
 1914: 100%  
 1915: 100%  
 1916: 100%  
 1917: 100%  
 1918: 100%  
 1919: 100%  
 1920: 100%  
 1921: 100%  
 1922: 100%  
 1923: 100%  
 1924: 100%  
 1925: 100%  
 1926: 100%  
 1927: 100%  
 1928: 100%  
 1929: 100%  
 1930: 100%

Year	1909	1910	1911	1912	1913	1914	1915	1916	1917	1918	1919	1920	1921	1922	1923	1924	1925	1926	1927	1928	1929	1930
1909	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100
1910	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100
1911	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100
1912	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100
1913	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100
1914	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100
1915	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100
1916	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100
1917	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100
1918	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100
1919	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100
1920	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100
1921	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100
1922	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100
1923	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100
1924	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100
1925	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100
1926	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100
1927	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100
1928	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100
1929	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100
1930	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100

The following table shows the percentage change in the value of stocks from 1909 to 1930. The value of stocks in 1909 is taken as 100. The percentage change is calculated as follows:  $\frac{\text{Value in Year} - 100}{100} \times 100$ .

1910: 100%  
 1911: 100%  
 1912: 100%  
 1913: 100%  
 1914: 100%  
 1915: 100%  
 1916: 100%  
 1917: 100%  
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 1929: 100%  
 1930: 100%



The Statistical Position of Canadian Wheat Supplies.

The following table shows the statistical position of Canadian wheat at **May 31st, 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 <sup>1/</sup>	304,144,000 <sup>2/</sup>
<b>Total Supplies</b>	<b>531,766,912</b>	<b>437,525,623</b>
Domestic Requirements	134,000,000	121,000,000 <sup>3/</sup>
<b>Available Supplies</b>	<b>397,766,912</b>	<b>316,525,623</b>
Exports - August to May	221,542,175	166,975,224
<b>Balance for export and carryover.</b>	<b>176,224,737</b>	<b>149,550,399</b>

- 1/ Revised Estimate.
- 2/ Final Estimate.
- 3/ Preliminary Estimate.

While available supplies at August, 1932 were 81.2 million bushels lower than at the same date of 1931, the lower exports of this season have reduced this disparity in stocks to 26.7 million bushels. Exports in the first ten months of the present crop year are 54.5 million bushels below those of the same months of 1930-31. Export clearances during June to date have been higher than in the corresponding period of June, 1931 and it seems probable that there will be an improvement in exports during the last two months of the crop year. The international position is considerably changed and in the recent decline of prices and exchange rates, Canada's participation in overseas trade is improved.

During June and July of 1931, exports amounted to 37 million bushels. A similar movement this year would reduce our stocks at July 31 to 112.5 million bushels. This figure makes no allowance, however, for the probable under-estimation of the western crop.





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 April 15th, 1932, in the form of percentages of the final estimates, which are as follows, compared with the percentages for the same date of the previous year:-

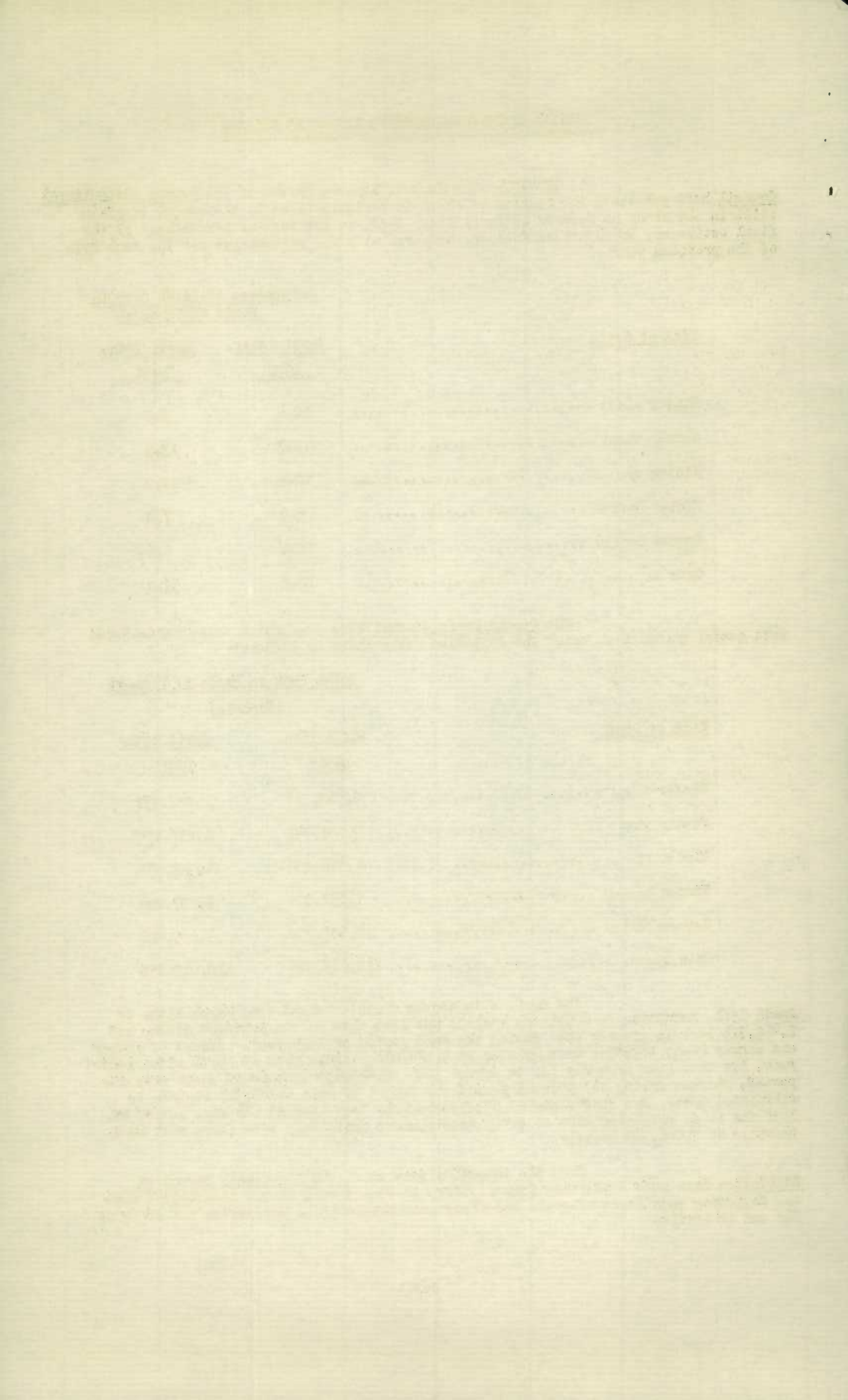
<u>Kind of Grain</u>	<u>Percentage of Total Crop in Hands of Farmers</u>	
	<u>April 15th.</u>	<u>April 15th.</u>
	<u>1932</u>	<u>1931</u>
Winter wheat .....	10.4	8.7
Summer wheat .....	19.8	13.9
Winter rye .....	12.2	18.2
Winter barley .....	6.9	7.4
Summer barley .....	12.8	8.6
Oats .....	28.8	32.0

The German Grain Journal have 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 (Bushels)</u>	
	<u>April 15th.</u>	<u>April 15th.</u>
	<u>1932</u>	<u>1931</u>
Winter wheat .....	13,962,378	11,022,930
Summer wheat .....	4,041,741	1,837,155
Winter rye .....	31,494,300	54,328,530
Winter barley .....	1,837,224	1,837,224
Summer barley .....	14,697,792	9,645,426
Oats .....	116,067,896	118,013,168

The decline in stocks of winter wheat from March 15th, to April 15th, amounting to 6,981,189 bushels was less than in the previous month, but 1,469,724 bushels greater than during the same period of last year. Stocks of winter and summer wheat together were greater by 5,144,034 bushels than at April 15th, last year, but last year from May 1st to August 30th 12,492,654 bushels of wheat were imported, whereas during the present period the import of only 6,246,327 bushels is calculated upon. Rye stocks are 22,833,730 bushels less than at the same period of 1931 and it is estimated that to cover requirements until July 15th there will be a shortage of 7,086,330 bushels.

From the investigations which the Government Bureau of Statistics have made concerning German stocks in second hand it was ascertained that the following quantities of grain and flour were available in warehouses and mills at the end of April:-





Local and Foreign  
Duty-paid Product

Foreign Product  
Duty unpaid

In Bushels

	<u>February</u>	<u>March</u>	<u>April</u>	<u>February</u>	<u>March</u>	<u>April</u>
Wheat .....	18,812,467	16,571,138	13,007,057	1,175,779	2,094,357	2,902,705
Rye .....	8,857,913	9,527,177	8,542,965	5,511,590	5,157,274	6,102,118
Oats .....	8,494,354	6,484,240	4,922,865	45,390	45,390	45,390
Barley .....	6,935,521	4,822,713	3,307,003	1,331,987	1,056,404	918,612
Wheat flour .... Bbls.	1,664,719	1,462,253	1,406,013	22,496	11,248	33,744
Rye flour ..... Bbls.	655,34	629,894	663,638	11,248	-	67,489

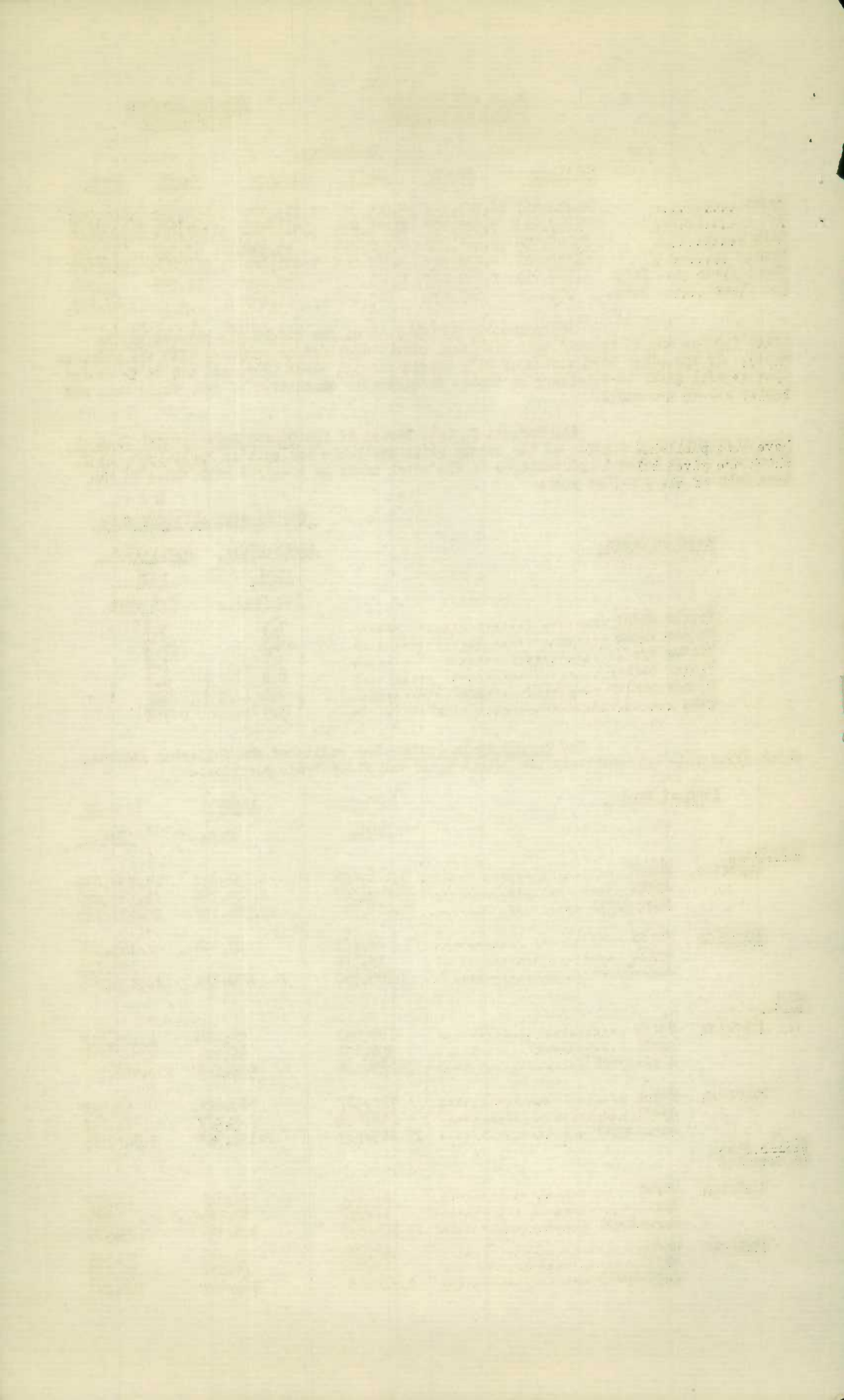
Approximately 95 per cent of the stocks are covered by the above figures and it is seen that all local stocks declined as compared with the previous month. On the other hand stocks of duty unpaid foreign wheat increased and it is stated that it will still be necessary to import considerable quantities of rye, while oats and barley stocks are small.

The Markets Reports Bureau of the German Agricultural Council have also published figures of the stocks still available for sale on April 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>Kind of Grain</u>	<u>Stocks available for Sale</u>	
	<u>April 15th.</u>	<u>April 15th.</u>
	<u>1932</u>	<u>1931</u>
	<u>Per Cent</u>	<u>Per Cent</u>
Winter wheat .....	7.1	5.3
Summer wheat .....	14.7	10.0
Winter rye .....	3.4	7.2
Winter barley .....	0.8	0.7
Summer barley .....	4.0	1.3
Oats .....	3.9	5.2

The German Grain Journal has published the following figures, which illustrate comparatively the German grain and flour trade position:-

<u>Kind of Grain</u>		<u>1929-30</u>	<u>1930-31</u>	<u>1931-32</u>
		<u>Bush.</u>	<u>Bush.</u>	<u>Bush.</u>
<u>Wheat:</u>				
<u>Imports:</u>	March .....	1,616,696	1,252,940	1,554,233
	April .....	4,089,507	1,679,160	1,513,816
	Aug.-April .....	4,668,537	20,576,136	20,377,723
<u>Exports:</u>	March .....	83,183	29,394	165,344
	April .....	18,372	-	183,716
	Aug.-April .....	3,795,562	470,312	12,136,246
<u>Rye:</u>				
<u>Imports:</u>	March .....	122,042	94,484	2,106,215
	April .....	551,159	66,926	3,936,850
	Aug.-April .....	3,169,164	988,149	10,802,716
<u>Exports:</u>	March .....	791,307	23,621	23,621
	April .....	748,002	3,937	15,747
	Aug.-April .....	15,223,799	2,157,394	3,617,965
<u>Flour, etc.:</u> (in Barrels)				
<u>Imports:</u>	March .....	21,371	32,619	16,872
	April .....	17,997	62,989	7,874
	Aug.-April .....	356,565	228,336	125,979
<u>Exports:</u>	March .....	122,604	80,986	93,359
	April .....	113,606	74,237	65,239
	Aug.-April .....	1,361,020	923,469	728,877





Following a late cold Spring the favourable weather during the latter part of April greatly improved the condition of the grain seeds and hay crops in Germany. Early planted winter seeds rooted strongly and are generally in satisfactory condition. Late planting is still backward.

On the basis of 2 - good, 3 - average and 4 - poor, the following report is given concerning the condition of the seeds in Germany at the beginning of May: winter rye 2.6 (last month 3.1); winter wheat 2.8 (3.2); winter spelt 2.7 (3.1); winter barley 2.8 (3.1); clover 2.8; lucerene 2.8; irrigated meadows 2.9 and other meadows 3.0.

Re-cultivation made necessary through winter damage was not as extensive as expected and on the whole was much less than last year. The average re-cultivation in percentages of the areas under cultivation in Germany was as follows: winter rye 0.5 (last year 3.0); winter wheat 1.0 (3.8); winter spelt 0.9 (3.1); winter barley 0.5 (3.5); clover 0.7 (4.3); and lucerne 0.7 (8.1).

AUSTRIA. The German Grain Journal reports that the condition of the seeds in Austria greatly improved during April. According to official reports the condition of the seeds at the end of April, compared with the previous month and April, 1931, on the basis 2 - above average, 3 - average and 4 - below average, was as follows:-

	End of March, 1932	End of April, 1932	End of April, 1931
Winter wheat .....	3.1	2.8	2.7
Summer wheat .....	-	3.1	2.6
Winter rye .....	2.9	2.6	2.8
Summer rye .....	-	2.4	2.8
Winter barley .....	2.9	2.8	2.8
Summer barley .....	-	2.4	2.3
Oats .....	-	2.5	2.5

CZECHOSLOVAKIA. The Government Bureau of Statistics in Prague have published the first estimate of the areas under cultivation in Czechoslovakia in 1932, which, with comparative figures for 1931, are as follows:-

	1932	1931
	<u>Acres</u>	
Winter wheat .....	1,967,138	1,937,053
Summer wheat .....	108,847	97,803
Spelt .....	1,562	1,537
Winter rye .....	2,448,005	2,417,339
Summer rye .....	70,485	72,685
Winter barley .....	15,840	15,978
Summer barley .....	1,734,527	1,764,959
Oats .....	2,056,014	2,042,225

In spite of larger areas being placed under cultivation in most instances for the present year insufficient cultivation of the soil, the declined use of artificial fertilizers and the unfavourable weather do not give reason to hope for a larger crop than previously.

The German Grain Journal reports that during April wheat imports into Czechoslovakia amounted to 1,653,440 bushels compared with 1,510,141 bushels in March and 503,380 bushels in April last year. Imports of wheat flour amounted to 47,242 barrels (70,863 and 3,374 barrels respectively) and of rye to 244,085 bushels (885,791 and 3,937 bushels respectively). The total imports since the beginning of the crop year amounted to 16,791,597 bushels of wheat (8,524,399 bushels last year); 8,582,333 bushels of rye (118,106 bushels); and 427,428 barrels of wheat flour (1,226,043 barrels).

According to the calculations of the Milling Association import requirements for the remaining three months of the crop year amount to only 10,000 wagons of wheat, which means a monthly contingent of 3,300 wagons.

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POLAND. According to investigations of the Chief Statistical Office the condition of seeds in Poland has greatly improved during April. The warm weather, which during the first half of April was accompanied by sufficient rains, has made good the damages caused by the abnormal weather during the previous month. The following figures give the condition of the various seeds at the end of April, taking as a basis 5 - very good and 1 - bad. The figures in brackets show the condition of the seeds at the end of March:-

Winter wheat .....	3.0 (2.8)
Winter rye .....	3.1 (2.9)
Winter barley .....	2.9 (2.8)
Rape seed .....	2.9 (2.8)
Clover .....	3.0 (2.9)

According to reports received during the first days of May from the different parts of the country, the condition of the seeds has further improved. The winter damage which the seeds suffered is generally said to be unimportant. These losses are given as follows: wheat 2.8, rye 3.4 and barley 1.3 per cent. The condition of the summer seeds is not so good, as sowing in most parts of the country took place during unfavourable weather.

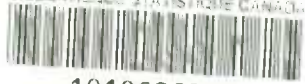
LITHUANIA. The German Grain Journal reports that according to a general estimate the condition of the winter grain in Lithuania at the beginning of May is better than last year. Spring seeding was done under favourable conditions and the young seeds have germinated well, so that the condition of these seeds is also better than last year. Generally no great changes have taken place in the areas under cultivation. The areas for flax and oats have declined, the former being the result of Russian competition, which makes the sowing of flax in Lithuania unprofitable.

ESTHONIA. The German Grain Journal reports that the Esthonian Government have decided to grant permission for the import of 73,486 bushels of foreign wheat, as the wheat stocks of the big mills are coming to an end.

RUSSIA. The German Grain Journal reports that according to the latest statements of the Agricultural Commissariat of Soviet Russia regarding spring seeding approximately 53,128,435 acres have been sown with summer grains up to May 5th compared with 60,541,705 acres last year. A total of 247,109,000 acres was planned for summer grains, but up to May 5th, which is an advanced period for spring cultivating, only a little more than 20 per cent of the planned cultivation had been carried out.

Up to April 25th the area under spring cultivation amounted to hardly 24,710,900 acres compared with 16,679,858 acres last year and 67,954,975 acres two years ago. At that date the position was more favourable than last year, although the figure was very far behind that of 1930. However, during the period April 25th and May 5th the prospects for this year became more unfavourable and the area under cultivation then was already 7,413,270 acres less than at the same period of last year. In an article of May 12th the "Lavestija" point out that the decline in spring cultivation is not only to be found in unfavourable weather conditions, although the continued rains greatly restricted cultivation work, but more because of the unsatisfactory results of the re-organization of the Soviet estates, machine and tractor stations, and the collective farms. It is also pointed out that the poor crop of 1931 was preceded by the record crop of 1930. The deficit last year could therefore be partly covered by the surplus of the former year. In view of this situation with respect to cultivation it is not likely that the planned area of 348,423,690 acres will be reached. This supposition is strengthened by the fact that the area cultivated with winter grain in the autumn only amounted to 92,418,766 acres compared with 100,079,145 acres in 1930.

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