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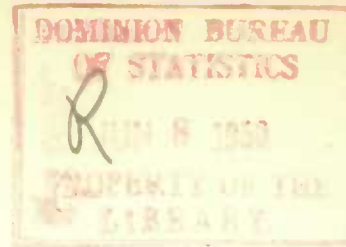
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CANADA

DOMINION BUREAU OF STATISTICS

AGRICULTURE DIVISION



THE WHEAT REVIEW



MAY, 1950

**DOMINION BUREAU OF STATISTICS
DEPARTMENT OF TRADE AND COMMERCE**

**THE
WHEAT REVIEW**

(Formerly Monthly Review of the Wheat Situation)

MAY, 1950

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

Prepared in Crops Section, Agriculture Division,
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WORLD WHEAT SITUATION

Current Supplies - Recent estimates indicate that the supply of wheat remaining at May 1, 1950 in the four major exporting countries for export and carryover at the end of their respective crop years amounted to 867 million bushels. At May 1, 1949 749 million bushels were available. Supplies this year (in millions of bushels) were held as follows, last year's figures in brackets: United States 505 (391); Canada 172 (182); Australia 110 (92) and Argentina 80(84).

New Crop Prospects - The outlook for the North American wheat crop is uncertain at this time. The May 1 crop report of the United States Department of Agriculture stated that U.S. crop prospects in general were less encouraging than on April 1. Winter wheat had developed slowly in most areas and deteriorated further in the dry southwest, reflecting growing conditions less favourable than usual during April. Additional abandonment decreased the acreage for harvest and slow growth lowered yield prospects. Winter wheat production was estimated at 690 million bushels. Seeding of spring wheat was being seriously delayed in the important Minnesota-Dakota-Montana area and it was thought farmers might find it impractical to seed their full intended acreages. With only average yields in the spring wheat areas, production of all wheat might fall below a billion bushels for the first time in seven years. During May, however, weather and moisture conditions improved over much of the winter wheat belt and spring seeding made good progress except in the general area of the Red River Valley. Trade sources have suggested that the winter wheat crop might now go as high as 750 million bushels.

In Canada, the official report on seeding intentions at April 30 indicated a small decline in wheat acreage, although some sources consider that the extremely backward season in parts of the west, particularly in Manitoba, may cause a greater decline in wheat acreage than farmers anticipated at April 30. Current crop conditions in the Prairie Provinces are extremely variable. Seeding is now making good progress in most areas but moisture supplies are deficient in many sections, particularly in Alberta, while flood and excessive moisture have held up operations over parts of Manitoba.

In the Argentine, moisture conditions are variable, but seeding is progressing rapidly. An over-all increase in grain acreage is anticipated in response to price incentives offered by the government. Trade circles consider that maximum wheat sowings will reach little more than 16 million acres although the government's goal exceeds 17 million. No new information is available on the progress of seeding in Australia.

Crop conditions in Europe with the possible exception of Spain are reported to be favourable with France in particular anticipating a good wheat crop—placed by the trade at as much as 328 million bushels. Her prewar (1935-39) average production was 286 million bushels.

International Wheat Agreement Sales and Purchases - An official statement of cumulative sales and purchases under the International Wheat Agreement, together with the quantities guaranteed under the Agreement by both exporting and importing countries for the period August 1 to May 12, 1950 follows: (Conversions from metric tons to bushels have been made at the rate of 36.74371 bushels to the ton with the resulting figures being rounded to the nearest thousand bushels).

Sales under the International Wheat Agreement, August 1, 1949—May 12, 1950
Together with Annual Quantities Guaranteed

Exporting Countries	Guaranteed Quantities	Total Sales
	- 000 bushels -	
Australia	80,101	78,904
Canada	203,377	174,903
France	3,307	3,307
U.S.A.	168,286	105,605
Totals	455,071	362,719

Purchases under the International Wheat Agreement, August 1, 1949—May 12, 1950
Together with Annual Quantities Guaranteed

Importing Countries	Guaranteed Quantities	Source:				Total Purchases
		Australia	Canada	France	U.S.A.	
		- 000 bushels -				
Austria	11,023	-	-	-	10,453	10,453
Belgium	20,209	-	7,632	-	7,490	15,122
Bolivia	2,756	-	366	-	630	996
Brazil	13,228	-	2	-	-	2
Ceylon 1/	4,409	4,409	-	-	-	4,409
Costa Rica	1,102	-	131	-	37	168
Cuba	7,422	-	3,274	-	1,275	4,549
Denmark	1,617	-	232	-	910	1,142
Dom. Republic	735	-	570	-	94	664
Ecuador 2/	1,286	-	401	-	875	1,276
Egypt	8,818	6,864	1,042	-	-	7,906
El Salvador 1/	404	-	115	-	309	424
Greece	15,726	-	2	-	10,214	10,216
Guatemala 1/	367	-	121	-	296	417
Haiti 1/	1,029	-	945	-	92	1,037
India 2/	38,287	38,274	-	-	-	38,274
Ireland	10,105	-	3,799	-	2,736	6,535
Israel	5,144	328	2,932	-	1,501	4,761
Italy	40,418	-	-	-	7,490	7,490
Lebanon	2,388	-	-	-	120	120
Mexico 2/	9,186	-	349	-	8,292	8,641
Netherlands	25,721	2,007	500	1,470	20,192	24,169
New Zealand	4,593	2,791	-	-	-	2,791
Nicaragua 1/	294	-	88	-	213	301
Norway	7,716	513	1,153	-	5,500	7,166
Panama	625	-	275	-	97	372
Peru	5,512	-	57	-	3,272	3,329
Philippines	7,202	7	476	-	567	1,050
Portugal 2/	5,144	55	275	-	4,782	5,112
Saudi Arabia	1,837	19	225	-	333	577
Sweden	2,756	1,008	-	-	-	1,008
Switzerland 1/	6,430	-	6,430	-	-	6,430
Union of S. Africa.	11,023	2,000	5,600	-	-	7,600
United Kingdom	177,068	20,629	133,968	1,837	16,915	173,349
Venezuela 1/	4,777	-	3,943	-	920	4,863
Totals	456,357	78,904	174,903	3,307	105,605	362,719

1/ Guaranteed quantity fulfilled.

2/ Fulfilment advised: Confirming reports awaited.

THE CANADIAN SITUATION

Purchases of Canadian Wheat by United Kingdom in 1950-51 - On May 30, the Right Hon. C. D. Howe, Minister of Trade and Commerce, read into the record in the House of Commons an agreed statement by the United Kingdom and Canadian Governments regarding the result of the recent wheat discussions. The statement as recorded in Hansard follows:

"The Canadian Minister of Trade and Commerce held discussions in London with United Kingdom ministers on the subject of the United Kingdom's wheat requirements in the crop year 1950-51 within the framework of the international wheat agreement.

"Both governments have now reviewed the results of those talks. They are agreed that the international wheat agreement removes the need for a contract to replace the existing Anglo-Canadian wheat agreement which expires at the end of July.

"The United Kingdom government has made it clear that out of its total wheat import requirements in 1950-51, it expects to buy a large proportion in Canada which, quite apart from the special contractual arrangements for the past four years, is, and it is hoped will remain, the traditional source of supply for the United Kingdom. The Canadian government, for its part, is satisfied that Canadian wheat growers will continue to find in the United Kingdom a market for a very substantial part of their exportable wheat."

Mr. Howe went on to say, "I should also mention that the United Kingdom has agreed to take 300,000 tons of Canadian flour at competitive North American prices as part of its purchases of Canadian wheat in the crop year 1950-51.

"In the light of all our discussions, I think it reasonable to assume that in 1950-51 the United Kingdom will purchase from Canada between 100 and 120 million bushels of wheat. It is understood that such wheat will be offered upon international wheat agreement terms as to price, quality and position not less favourable than those obtained by any other buyer in the dollar market, whether in the United States or in Canada."

Crop Conditions in the Prairie Provinces - The following notes are extracted from the Telegraphic Crop Report of May 30:

The most backward season on record is being experienced in Manitoba. Wheat seeding is only well started in the south and operations are under way on lighter soils in the Red River Valley. In the central and northern areas wheat seeding is nearing completion and seeding of oats and barley is well under way. Seeding should be general in southern Manitoba by the end of the week. Water is receding rapidly in the inundated areas and with favourable weather over 50 per cent may be seeded. Sugar beet seeding is started with some reduction in area from the contracted 21,000 acres. All growth has been rapid during the past week and a few fields of wheat are up. Pastures and hay crops, especially sweet clover, are promising. The only dry parts in the province are centred at Russell and Swan River where some soil drifting has been taking place.

Good progress has been made with seeding in Saskatchewan except in the south-east and small local areas of the north. Spring work is nearing completion in central and western districts. For the province as a whole, over 80 per cent of the wheat and 50 per cent of coarse grains are now seeded and early seedings have germinated well in most areas with about 25 per cent showing green. Surface moisture conditions are fair to good but subsoil moisture reserves in most areas are low. Grasshopper hatching has started in some localities and is expected to become general this week but other than

slight local wireworm activity no reports of insect damage have been received. Pasture growth was late but has been rapid during the past week and the feed situation has improved materially.

Rain in the Peace River area and showers in south and southcentral Alberta afforded some measure of relief during the past week. More rain is needed however to promote satisfactory growth, and lack of moisture is becoming serious north of the Edmonton-Wainwright line. The weather remains cool and growth is slow while high winds have caused considerable soil drifting in many areas. Wheat fields in early seeded districts are becoming green and germination appears satisfactory. Seeding of wheat throughout the province is nearing completion with the proportion of coarse grain crops seeded varying from 40 to 90 per cent.

Supply Situation - Total exports of wheat and wheat flour during the August-April period of the current crop year amounted to 157.7 million bushels, an increase of 5.4 million bushels over the comparable period of 1948-49. Exports of wheat as grain to April 30, 1950 were 125.1 million bushels, an increase of 10.3 million over last year's total for the same period. Exports of flour in terms of wheat, however, were 4.9 million bushels below the 1948-49 total for the first nine months. Of this crop year's exports to date some 63 per cent of the wheat and 43 per cent of the flour have gone to the United Kingdom. The balance remaining on May 1 for export or carryover was estimated at 172.1 million bushels compared with 182.4 million on the same date last year.

Canadian Wheat Supplies

	1949-50	1948-49
	- million bushels -	
Carryover in North America July 31	102.4	77.7
New Crop	367.4	386.3
Imports of Wheat and Wheat Flour August 1—March 31 ...	<u>1/</u>	0.3
Totals, Supply	469.8	464.3
Estimated Domestic Requirements	140.0 <u>2/</u>	129.6
Available for export or carryover	329.8	334.7
Deduct:		
Overseas clearances of wheat as grain August 1—Apr. 30	117.2	113.6
Exports of Canadian wheat to U.S. August 1—April 30 .	7.9	1.2
Totals, Wheat Exports	125.1	114.8
Exports of wheat flour in terms of wheat Aug.1—Apr. 30	32.6 <u>3/</u>	37.5 <u>3/</u>
Totals, Exports Wheat and Wheat Flour	157.7	152.3
Balance on May 1 for Export or Carryover	172.1	182.4

1/ Less than 50,000 bushels.

2/ Preliminary estimate.

3/ August 1, 1949 to January 31, 1950 and entire crop year 1948-49 adjusted for time-lag in the returns made by Customs.

Acreage Intentions for 1950 - The acreage in Canada intended for all wheat (spring and winter) in 1950 is placed at 27.2 million acres, about one per cent below last year's level of 27.5 million. This may be compared with the 10-year average (1940-49) of 23.6 million acres. Intended wheat seedings in the Prairie Provinces are placed at 26.1 million, down some 0.4 million from 1949. Ontario's wheat acreage for harvest in 1950 is currently placed at 917,800 acres (nearly all of which is winter wheat), an increase of six per cent over the 1949 harvested area. Wheat is of much less importance in the remaining provinces and the small changes indicated have little effect on the national total. Winter wheat is seeded to some extent in Alberta and Saskatchewan but official estimates on these seedings are not currently available. It is thought, however, that the total of such wheat on the Prairies is probably less than 200,000 acres, most of which is in Alberta. For the purpose of this report, western winter wheat has been included under spring wheat, and the acreage of winter wheat shown in the totals refers to Ontario only. These intended acreage estimates are merely indicative of farmers' plans at the end of April, and acreages actually seeded may, therefore, vary considerably from the intentions figures, depending upon conditions affecting seeding subsequent to April 30.

Intended Acreage of Wheat in Prairie Provinces, 1950
Compared with the 1949 Seeded Acreage

	Intentions 1950	Acreage Seeded in 1949	Expected Change
		- acres -	
Manitoba	2,850,000	3,167,000	- 317,000
Saskatchewan	15,894,000	15,737,000	+ 157,000
Alberta	7,358,000	7,586,000	- 228,000
Totals	26,102,000	26,490,000	- 388,000

Intended Acreages of Principal Crops and Summerfallow
in the Prairie Provinces, 1950
Compared with Official Estimates for Prior Years

	Wheat 1/	Oats	Barley	Rye 2/	Flaxseed	Summerfallow
						- thousand acres -
10-year average (1930-39)	24,790	8,663	3,488	764	361	14,484
1940	27,750	7,818	3,622	943	364	17,326
1941	21,140	8,137	4,735	861	982	23,112
1942	20,653	9,666	6,414	1,246	1,466	19,979
1943	16,091	11,790	7,896	498	2,918	20,637
1944	22,444	10,447	6,763	573	1,298	19,783
1945	22,566	10,749	6,859	410	1,034	19,859
1946	23,731	8,522	5,797	641	821	20,422
1947	23,357	7,898	7,035	1,072	1,513	19,440
1948	22,820	7,535	6,082	1,965	1,810	19,991
1949	26,490	7,339	5,617	1,061	304	20,958
10-year average (1940-49)	22,704	8,990	6,082	927	1,251	20,151
1950 3/	26,102	7,875	6,511	1,060	482	20,105

1/ Includes relatively small acreages of winter wheat sown the previous autumn for harvest during the current year.

2/ Includes fall rye sown the previous autumn for harvest during the current year.

3/ Intentions indicated on April 30, 1950.

Farmers' Marketings of Wheat in the Prairie Provinces, 1949-50

Week ending		Manitoba	Saskatchewan	Alberta	Total	Last Year
- bushels -						
August	1-4	86,906	396,425	857,679	1,341,010	1,047,366
	11	1,487,047	408,852	352,356	2,248,255	1,396,538
	18	3,916,751	2,375,960	2,036,147	8,328,858	2,120,222
	25	9,032,150	6,744,337	3,980,747	19,757,234	10,570,201
September	1	6,953,093	8,751,113	4,960,194	20,664,400	25,951,607
	8	5,104,625	12,005,438	7,572,940	24,683,003	31,542,951
	15	3,394,999	16,809,771	7,977,799	28,182,569	34,421,627
	22	1,511,831	15,854,167	8,051,995	25,417,993	27,525,049
	29	1,249,693	11,832,544	6,596,577	19,678,814	17,806,785
October	6	781,873	12,004,362	6,543,917	19,330,152	14,001,115
	13	531,130	5,224,134	4,027,785	9,783,049	11,244,938
	20	431,778	4,307,972	3,302,630	8,042,380	9,256,027
	27	174,784	3,804,123	2,518,155	6,497,062	7,873,337
November	3	293,156	3,797,858	1,935,700	6,026,714	6,620,489
	10	229,101	3,436,128	1,762,805	5,428,034	4,981,699
	17	265,037	2,544,609	1,199,154	4,008,800	4,794,010
	24	270,103	2,767,094	1,346,397	4,383,594	4,411,372
December	1	278,985	2,972,258	1,169,791	4,421,034	3,535,124
	8	307,306	3,040,022	1,193,263	4,540,591	3,439,280
	15	379,391	2,305,535	1,292,377	3,977,303	2,015,039
	22	584,752	3,039,794	2,109,705	5,734,251	3,071,057
	29	663,019	2,636,205	1,581,786	4,881,010	3,026,547
January	5	245,905	1,077,129	577,553	1,900,587	3,436,527
	12	222,310	741,034	939,661	1,903,005	3,195,302
	19	191,689	799,905	758,560	1,750,154	3,641,807
	26	95,218	620,728	636,069	1,352,015	1,117,750
February	2	53,533	240,528	323,458	617,519	1,422,034
	9	82,128	469,280	725,495	1,276,903	1,381,373
	16	186,243	686,546	1,328,487	2,201,276	739,191
	23	163,945	510,586	1,497,752	2,172,283	720,758
March	2	94,315	470,769	1,378,293	1,943,377	1,323,790
	9	117,358	424,414	1,090,000	1,631,772	1,828,623
	16	110,821	766,774	1,198,902	2,076,497	1,894,221
	23	162,120	914,722	1,156,825	2,233,667	1,640,947
	30	87,050	668,332	633,416	1,388,798	1,201,109
April	6	252,076	418,199	238,802	909,077	1,282,059
	13	161,329	249,517	370,467	781,313	2,077,165
	20	219,161	412,367	800,092	1,431,620	2,787,101
	27	207,384	842,269	1,030,871	2,080,524	2,345,370
May	4	242,410	2,466,426	967,734	3,676,570	1,698,668
	11	99,607	2,642,496	886,154	3,628,257	1,604,632
	18	106,730	1,631,845	782,769	2,521,344	1,830,615
Totals		41,028,842	144,112,567	89,691,259	274,832,668	267,821,422

Visible Supply of Canadian Wheat, May 18, 1950, Compared With
Approximately the Same Date, 1949 and 1948

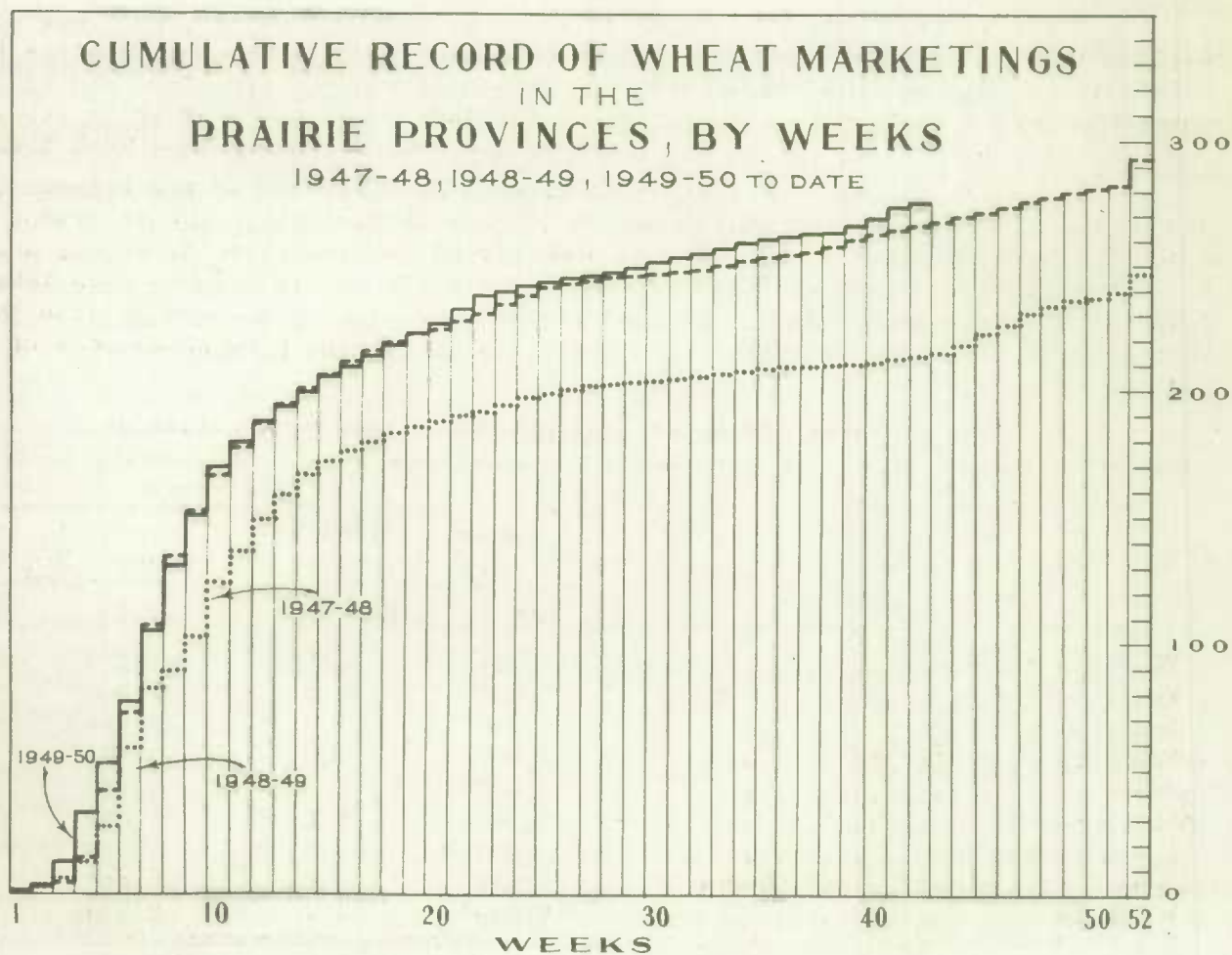
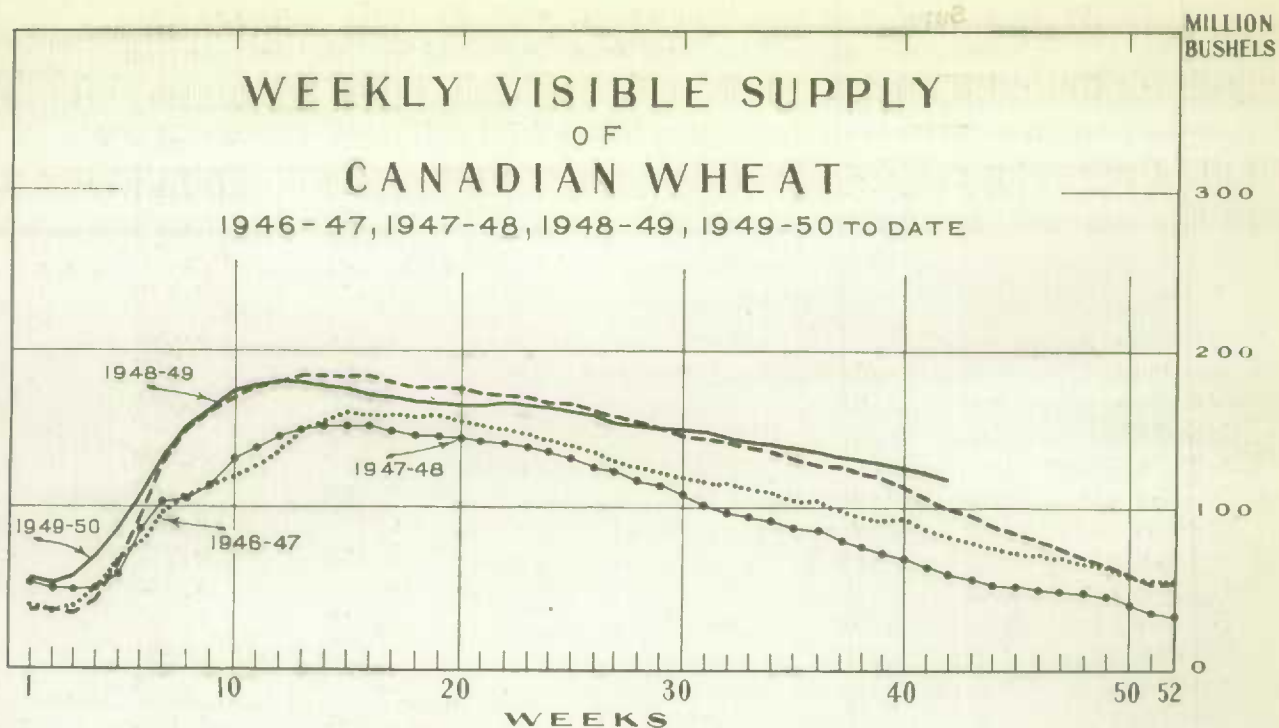
	1950	1949	1948
	- 000 bushels -		
Country Elevators - Manitoba	2,145	2,594	2,144
Saskatchewan	14,356	9,272	9,798
Alberta	17,829	13,512	8,312
Totals	34,330	25,378	20,254
Interior Private and Mill Elevators	3,713	4,200	2,874
Interior Public and Semi-Public Terminals	61	85	854
Vancouver-New Westminster	12,885	12,221	6,655
Churchill	126	100	144
Fort William and Port Arthur	39,238	13,258	4,923
In Transit - Rail (Western Division)	7,266	5,205	3,693
Eastern Elevators - Lake Ports	6,352	16,601	8,190
St. Lawrence and Seaboard Ports	5,356	15,910	6,791
In Transit - Lake	6,670	4,942	3,900
In Transit - Rail (Eastern Division)	1,016	1,393	1,701
United States Ports	519	481	-
In Transit - U.S.A.	-	5	-
Totals	117,532	99,779	59,979

The visible supply of Canadian wheat at midnight May 18, 1950 was 117.5 million bushels compared with 99.8 and 60.0 million bushels on approximately the same date in 1949 and 1948 respectively. Stocks at country elevators and at lakehead terminals were considerably higher than at the same time last year while stocks at Bay and Lower Lake Ports and at St. Lawrence and Seaboard ports were much lower.

The late opening of navigation delayed movement out of the Lakehead, but during the five-week period ending May 18, stocks at Fort William-Port Arthur dropped some 11.4 million bushels. During the same period country elevator stocks declined by 12.5 million. Stocks at Vancouver-New Westminster and in transit (via lake and rail) in the Eastern Division increased in the same time by 5 and 7 million bushels respectively. Changes in other stock positions during the five weeks were of smaller magnitude.

Grading of Wheat Inspected, August—April 1949-50 and 1948-49

	Inspections			
	August 1, 1949 to April 30, 1950		August 1, 1948 to April 30, 1949	
	Cars	Per Cent	Cars	Per Cent
1 Manitoba Northern	22,741	16.1	42,367	30.4
2 Manitoba Northern	79,325	56.3	57,006	40.9
3 Manitoba Northern	16,513	11.7	12,619	9.1
4 Manitoba Northern	4,207	3.0	2,634	1.9
Garnet	2,542	1.8	1,767	1.3
Amber Durum	5,081	3.6	7,558	5.4
Alberta Winter	883	0.6	1,325	0.9
Toughs - All Varieties and Grades ..	3,869	2.8	8,867	6.4
All Others	5,730	4.1	5,104	3.7
Totals	140,891	100.0	139,247	100.0



Wheat Shipments to the United States by Destination,
August 1, 1949—May 18, 1950

Compared with Approximately the same period, 1948-49 and 1947-48

	1949-50	1948-49	1947-48
	bu.	bu.	bu.
<u>By Vessel</u>			
Buffalo	9,517,297	9,888,096	14,266,961
Oswego	-	737,500	-
Erie	-	1,575,567	1,155,260
Toledo	-	325,053	-
Chicago	192,766	-	-
Duluth-Superior	-	111,902	-
Totals, Vessel Shipments	9,710,063	12,638,118	15,422,221
<u>By Rail</u>			
U.S.A. Seaboard Ports	95,900	-	-
Other U.S.A. Points	976,631	92,000	60,577
Totals, Rail Shipments	1,072,531	92,000	60,577
Grand Totals	10,782,594	12,730,118	15,482,798

Shipments of wheat by water to the United States for re-export or retention during the five-week period ending May 18, 1950 amounted to 2,778,615 bushels, while rail movements amounted to only 280,611 bushels. Total shipments of Canadian wheat to the United States from August 1 to May 18 of the current crop year amounted to 10.8 million which is below the amount for approximately the same periods of the two previous crop years. Compared with the same period for each of the two previous crop years there was a considerable increase in rail shipments particularly in the amount destined for inland points. Buffalo continues to be the principal destination of Canadian wheat shipments and up to May 18, had received 88 per cent of this crop year's shipments to the United States.

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

	August 1, 1949 to May 18, 1950	August 1, 1948 to May 19, 1949
	- bushels -	
Collingwood	588,474	1,357,387
Midland	6,667,044	5,376,177
Owen Sound	1,147,892	1,911,907
Port McNicoll	6,526,707	2,695,480
Goderich	208,343	379,769
Sarnia	1,084,665 ^{1/}	996,095
Humberstone	232,900	-
Walkerville	13,329	-
Port Colborne	-	27,426
Prescott	-	11,066
Montreal	-	3,911
Totals	16,469,354	12,759,218

^{1/} Revised.

With lake navigation opening on April 29, there have been no rail shipments of wheat to Maritime ports from bay, lake and St. Lawrence ports in the five-week period ending May 18, 1950.

Lake Shipments of Canadian Grain from the Opening of Navigation to May 18, 1950
and to Approximately the Same Date, 1939 to 1949

	Wheat	Oats	Barley	Rye	Flaxseed	Totals
	- bushels -					
1939	20,139,644	2,442,040	2,536,014	122,999	-	25,240,697
1940	47,158,904	4,675,753	1,189,896	725,464	97,277	53,847,294
1941	62,593,519	2,389,524	1,311,924	867,685	295,951	67,458,603
1942	58,491,860	782,096	890,670	506,827	86,191	60,757,644
1943	30,700,628	8,613,405	7,118,026	988,626	564,067	47,984,752
1944	65,132,818	16,934,673	10,996,646	2,994,800	3,238,233	99,297,170
1945	60,082,144	24,062,193	11,905,469	1,735,608	1,088,850	98,874,264
1946	29,043,968	18,259,407	6,738,449	517,568	333,650	54,893,042
1947	25,264,094	8,801,304	4,372,841	987,033	-	39,425,272
1948	22,407,446	3,715,550	3,656,270	231,449	1,176,018	31,186,733
1949	48,360,504	4,351,215	4,888,011	3,540,498	2,993,250	64,133,478
1950	21,846,834	2,155,257	4,023,873	662,059	69,271	28,757,294

The 1950 navigation season at the Lakehead opened on April 29, the latest date since 1939 when the first boat arrived on May 1. Last year's opening was on April 6. The late opening this year has been reflected in the smallest movement to May 18 since the 1939 season. Total lake shipments of the five major grains to this date were only 28.8 million bushels as against 64.1 million to approximately the same date in 1949. Shipments of wheat this year were some 21.8 million bushels accounting for 76 per cent of the total. Shipments of oats at 2.2 million, barley at 4.0 million, rye at 662,059 bushels and flaxseed at 69,271 bushels made up the remainder.

Cascade Spring Wheat Recommended in Eastern Canada -

A press release

issued by the Information Service of the Department of Agriculture, under date of April 6, is reproduced herewith:

"Feed grain prices are relatively high and a small acreage of good spring wheat usually saves considerably on the money spent for chicken feed in Eastern Canada. Cascade, the semi-hard white spring wheat, is the variety to grow for feed purposes in this part of the country. During the past two years, it has exceeded all others in yield. While both seasons were unusual, most farmers report that their Cascade has not been given a good chance to show what it can really do. The extreme heat of the 1949 summer prematurely ripened the crops and prevented the kernels from filling properly. In spite of this, Cascade for the last two years generally outyielded all the named varieties by from two to four bushels per acre. At Normandin, in Northern Quebec, the yields of Cascade were as low as 19.1 bushels in comparison to 20.3 for Huron and 19.8 for Coronation II. On the other hand, Cascade at Fredericton in 1949 has yielded 49.7 bushels compared to 38.0 for Huron and 40.7 for Coronation II. On a five year average at Eastern Branch Farms, Cascade yielded 31 bushels compared to 29.4 for Huron and 28.4 for Coronation II.

The fact that Cascade is resistant to stem rust and to most of the forms of mildew generally found in Eastern Canada, along with an excellent yield, has increased the interest in growing spring wheat in many areas, say J. G. C. Fraser of the Cereal Division of the Central Experimental Farm. Seed supplies should be ample for the spring's requirements."

Rail Shipments from Fort William-Port Arthur - Details of monthly
rail shipments of wheat from the Lakehead for the current and preceding three
crop years and the distribution of the **April 1950** shipments are set forth in the
tables below:

Monthly Rail Shipments of Wheat from the Lakehead, 1946-47 to 1949-50

	1946-47	1947-48	1948-49	1949-50
- bushels -				
August	187,825	90,574	51,283	158,893
September	175,773	91,366	30,017	131,712
October	255,754	131,290	46,274	122,481
November	256,249	100,563	138,600	92,334
December	1,601,883	691,223	1,740,405	342,946
January	2,462,002	3,149,421	3,794,391	277,502
February	1,816,087	1,851,773	3,720,733	240,087
March	1,711,013	3,423,684	1,511,072	423,774
April	566,006	371,950	659,467	2,305,727
May	361,386	154,551	884,171	
June	241,475	81,133	330,348	
July	123,145	231,414	469,797	
Totals	9,758,598	10,368,942	13,376,558	

Distribution of Rail Shipments of Wheat from the Lakehead
by Provinces and Grades, April 1950

	Quebec	Ontario	U.S.A.
- bushels -			
1 Northern	525,000	18,000	51,333
2 Northern	725,500	337,500	290,500
3 Northern	6,000	85,000	-
No. 5	82,417	2,833	-
No. 6	-	27,567	45,114
Feed	10,020	-	12,000
Rejected 4 Northern	1,500	-	-
Rejected No. 5	1,500	667	-
Tough No. 5	4,183	9,000	500
Tough No. 6	7,298	8,150	3,133
Tough Rejected No. 5 Mixed Heated	1,333	-	-
1 C.W. Amber Durum	1,333	-	-
2 C.W. Amber Durum	-	28,000	-
3 C.W. Amber Durum	4,500	-	-
Sample Red Spring Fireburnt	-	351	-
Sample Red Spring Heated	1,412	1,241	-
Tough Sample Red Spring Heated	2,993	5,385	-
Tough Sample Red Spring and Amber Durum Htd. .	-	326	-
Tough Sample Red Spring Wheat and Rye Htd. ...	-	585	-
3 C.W. Soft White Spring	-	3,553	-
Totals	1,374,989	528,158	402,580
Grand Total	2,305,727		

Freight Assistance Shipments -

Based on claims filed for payment up to April 30, 1950, freight-assisted wheat shipments from the Prairie Provinces to eastern Canada and British Columbia during August-March of the current crop year amounted to 5.9 million bushels, 20 per cent less than the total shipped during the same period in 1948-49. While most of the provinces have received smaller shipments than last year the decrease has been particularly noticeable in Ontario, which along with Quebec normally takes the bulk of feed grain shipments. Since the current total is subject to upward revision as additional claims are filed, the apparent spread between this and the previous year's total may be reduced to some extent.

Provincial Distribution of Freight-Assisted Wheat Shipments 1949-50 and 1948-49

1949-50	New- found- land	Prince Edward Island	Nova Scotia	New Brun- swick	Quebec	Ontario	British Columbia	Total
- 000 bushels -								
August	2	25	28	27	372	244	241	939
September .	2	13	24	18	403	256	215	931
October ...	2	7	31	23	348	272	214	897
November ..	2	10	23	18	342	265	195	855
December ..	1	11	21	16	215	232	208	704
January ...	1	5	17	16	171	167	183	560
February ..	1	7	20	12	167	175	161	543
March	-	10	17	14	205	195	42	483
Totals ..	11	88	181	144	2,223	1,806	1,459	5,912
Same Period 1948-49 ..	-	84	263	190	2,244	2,756	1,844	7,381

Claims filed for payment under the Freight Assistance Plan indicate millfeed shipments amounted to 375,779 tons during the eight-month period ending March 31, 1950. While this preliminary total is below the comparable figure for 1948-49 the decline in millfeed shipments has not been as marked as in freight-assisted wheat shipments. As with the latter, the current crop year's millfeed shipments are subject to upward revision as additional claims are filed for payment.

Provincial Distribution of Freight-Assisted Millfeed Shipments 1949-50 and 1948-49

	August 1, 1949 to March 31, 1950	August 1, 1948 to March 31, 1949
- tons -		
Newfoundland	1,593	-
Prince Edward Island	7,445	6,712
Nova Scotia	29,159	31,997
New Brunswick	24,688	26,845
Quebec	169,017	174,178
Ontario	114,440	134,626
British Columbia	29,437	37,565
Totals	375,779	411,923

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

	Overseas Clearances of Canadian Wheat	U.S. Imports <u>1/</u> of Canadian Wheat for Consumption and Grinding in Bond	Customs <u>2/</u> Exports of Canadian Wheat Flour	Total	Customs <u>3/</u> Exports of Wheat and Wheat Flour
- 000 bushels -					
<u>1947-48</u>					
August	9,601	2	7,048	16,651	18,140
September	9,363	12	5,864	15,239	15,990
October	9,680	35	7,001	16,716	17,204
November	12,006	1	5,796	17,803	22,763
December	7,480	2	3,829	11,311	20,717
January	15,175	3	4,064	19,242	15,961
February	11,296	71	4,970	16,337	10,743
March	10,323	2	4,082	14,407	15,058
April	10,080	3	5,783	15,866	9,965
May	12,955	1	5,086	18,042	19,924
June	12,464	1	4,730	17,195	15,881
July	12,949	-	3,224	16,173	17,129
Totals	133,372	133	61,477	194,982	199,475
<u>1948-49</u>					
August	9,111	1	4,244	13,356	13,829
September	10,555	3	3,671	14,229	11,942
October	11,566	1	6,509	18,076	21,913
November	15,604	6	5,455	21,065	20,792
December	12,744	8	3,803	16,555	18,205
January	14,431	22	3,756	18,209	18,342
February	12,053	43	3,082	15,178	14,214
March	13,806	206	3,612	17,624	13,707
April	13,769	869	3,368	18,006	20,303
May	22,483	1,381	3,780	27,644	26,683
June	23,297	1,899	3,225	28,421	24,850
July	19,561	816	3,589	23,966	23,422
Totals	172,980	5,255	48,094	232,329	228,202
<u>1949-50 ^{4/}</u>					
August	16,639	62	3,898	20,599	24,013
September	14,947	881	3,771	19,599	18,294
October	18,420	1,675	3,240	23,335	21,903
November	20,680	2,019	4,410	27,109	27,292
December	9,751	867	3,798	14,416	21,002
January	10,608	411	3,279	14,298	15,102
February	7,419	495	3,337	11,251	11,216
March	10,232	964	3,625	14,821	13,609
April	8,460	515	3,294	12,269	12,628
Totals	117,156	7,889	32,652	157,697	165,059

1/ U.S.A. official figures for 1947-48 and 1948-49. Later months compiled by Board of Grain Commissioners from returns of Canadian elevator licensees and advice from American grain correspondents.

2/ Exports for Crop Years 1947-48, 1948-49 and August 1, 1949 to January 31, 1950 revised to remove effect of time lag in the returns made by Customs. Subsequent months to be revised as data become available.

3/ Unadjusted, as published by the External Trade Division, D.B.S.

4/ Subject to revision.

Exports of Canadian Wheat and Wheat Flour

August 1, 1949 to April 30, 1950

	MARCH		APRIL		AUGUST-APRIL	
	Wheat Flour <u>1/</u>	Wheat- <u>2/</u>	Wheat Flour <u>1/</u>	Wheat- <u>2/</u>	Wheat Flour <u>1/3/</u>	Wheat <u>2/</u>
	- bushels -		- bushels -		- bushels -	
<u>COMMONWEALTH COUNTRIES</u>						
United Kingdom	1,595,970	6,369,387	1,286,793	5,264,742	14,001,214	79,341,046
Ireland	-	548,800	-	-	-	2,174,667
<u>Africa</u>						
Union of S.Africa ..	-	528,267	-	1,254,687	1,030	3,091,137
<u>Br. West Africa</u>						
Gambia	-	-	-	-	3,672	-
Gold Coast	17,172	-	14,886	-	183,177	-
Nigeria	994	-	1,148	-	5,310	-
Sierra Leone	9,293	-	5,922	-	56,283	-
<u>Asia</u>						
British Malaya	-	-	406,215	-	1,002,249	-
Ceylon	488,583	-	116,591	-	605,174	-
Hong Kong	40,757	-	65,650	-	1,300,459	-
<u>Europe</u>						
Gibraltar	-	-	-	-	49,172	-
Malta	-	275,500	-	-	-	1,183,167
<u>North America</u>						
Bahamas	32,521	-	13,567	-	184,094	-
Barbados	44,510	-	48,037	-	355,103	866
Jamaica	95,670	-	48,681	-	1,232,113	-
Trinidad-Tobago	110,358	-	198,239	-	1,901,921	-
Leeward-Windward Is.	66,213	-	98,294	-	625,186	-
Bermuda	7,484	-	11,898	-	87,143	-
British Honduras ...	1,836	-	5,467	-	30,856	-
<u>South America</u>						
British Guiana	157,297	-	84,852	-	826,641	-
<u>Totals, Commonwealth</u>						
Countries	2,668,658	7,721,954	2,406,240	6,519,429	22,450,797	85,790,883

Exports of Canadian Wheat and Wheat Flour - continued

	MARCH		APRIL		AUGUST-APRIL	
	Wheat Flour <u>1/</u>	Wheat <u>2/</u>	Wheat Flour <u>1/</u>	Wheat <u>2/</u>	Wheat Flour <u>1/3/</u>	Wheat <u>2/</u>
	- bushels -		- bushels -		- bushels -	
<u>FOREIGN COUNTRIES</u>						
<u>Africa</u>						
Azores and Madeira .	5,630	-	-	-	14,783	-
Belgian Congo	8,550	-	13,518	-	79,038	-
Canary Islands	-	-	-	-	9,860	-
Egypt	-	1,041,600	-	-	-	1,041,600
Liberia	464	-	544	-	6,349	-
Madagascar	-	-	-	-	17,824	-
Morocco	28,714	-	17,681	-	338,401	213,124
Portuguese Africa ..	39,159	-	230	-	241,771	-
Spanish Africa	-	-	-	-	48,024	-
Tripoli	-	-	-	-	-	112,000
<u>Asia</u>						
Arabia	8,492	-	-	-	167,855	91,768
China	-	-	25,713	-	80,807	-
Indonesia	-	-	-	-	14,706	-
Iran	-	-	-	-	9,652	4,274,108
Israel	-	179,439	-	-	1,566	3,145,209
Japan	9,112	36,638	7,344	350,933	23,706	2,794,732
Philippine Islands .	167,090	-	208,228	-	3,359,457	-
Portuguese Asia	6,885	-	2,812	-	9,697	-
Siam	12,096	-	4,590	-	97,780	-
Turkey	-	-	-	-	-	2,114,933
<u>Europe</u>						
Belgium	-	403,200	-	946,268	18,180	6,564,272
Denmark	-	-	-	-	513	122,000
Finland	-	-	-	-	-	110,236
France	-	-	-	-	1,377	-
Germany	-	-	-	-	33,241	-
Greece	-	-	2,160	-	22,486	-
Italy	53,019	190,400	-	-	67,707	446,335
Netherlands	-	-	-	-	7,524	-
Norway	-	-	-	-	-	1,153,007
Poland	-	-	-	-	1,062	-
Portugal	-	-	4,820	-	36,986	-
Spain	-	517,328	-	-	-	1,550,138
Switzerland	-	11,200	-	373,334	5,202	5,712,785
Yugoslavia	2,682	-	3,681	-	23,756	-
<u>North America</u>						
Alaska	-	-	-	-	68	-
Costa Rica	8,892	-	24,970	16,667	230,571	113,334
Cuba	95,197	-	184,262	-	1,426,594	-
Dominican Republic .	12,938	-	11,763	1,600	147,114	5,600
El Salvador	15,602	-	11,920	10,000	104,544	10,000
Guatemala	37,179	-	21,055	-	248,656	73,467
Honduras	-	16,515	-	22,075	7,803	75,110
Haiti	15,966	-	21,402	-	181,603	-

Exports of Canadian Wheat and Wheat Flour - concluded

	MARCH		APRIL		AUGUST-APRIL	
	Wheat Flour <u>1/</u>	Wheat <u>2/</u>	Wheat Flour <u>1/</u>	Wheat <u>2/</u>	Wheat Flour <u>1/3/</u>	Wheat <u>2/</u>
	- bushels -		- bushels -		- bushels -	
<u>FOREIGN COUNTRIES</u>						
<u>North America</u>						
Mexico	-	-	-	-	-	349,440
Nether.Antilles ..	19,669	-	18,072	-	170,559	-
Nicaragua	9,063	-	14,612	-	74,755	3,333
Panama	22,216	-	11,952	-	156,690	-
Puerto Rico	787	-	-	-	787	-
St.Pierre-Miquelon	2,452	-	-	-	17,599	-
Virgin Islands ...	2,412	-	-	-	9,459	-
<u>United States</u>	4,590	-	2,313	-	79,528	-
For grinding in bond <u>4/</u>	-	797,845	-	434,798	-	7,054,470
For domestic consumption <u>4/</u> ..	-	166,281	-	80,278	-	834,354
<u>Oceania</u>						
French Oceania ...	40,496	-	-	-	40,496	-
Guam	459	-	-	-	459	-
Hawaii	-	-	-	-	1,377	433
<u>South America</u>						
Bolivia	-	-	-	-	3,838	354,668
Brazil	-	-	-	1,839	-	1,839
Colombia	10,980	106,556	-	206,210	43,195	541,299
Ecuador	13,599	7,467	14,531	11,200	170,433	56,000
Peru	-	-	-	-	53,064	330,690
Surinam	18,117	-	20,385	-	145,053	-
Venezuela	284,418	-	239,017	-	2,148,120	3,500
<u>Totals, Foreign Countries</u>	956,925	3,474,469	887,575	2,455,202	10,201,675	39,253,784
<u>Grand Totals ,</u>						
Exported	3,625,583	11,196,423	3,293,815	8,974,631	32,652,472	125,044,667

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

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

3/ Exports from August 1 to January 31, 1950 revised to remove effect of time lag in the returns made by the Customs.

4/ Compiled from returns of Canadian elevator licensees and advice from American grain correspondents.

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

		Weeks ending				
		April 29	May 6	May 13	May 20	May 27
(A)	<u>CANADIAN WHEAT BOARD CASH PRICES</u>	- cents and eighths per bushel -				
	<u>WHEAT</u>					
(1)	<u>Initial Payment to Producers Compulsory Pool 1949-50</u>					
	1 Hard	175	175	175	175	175
	1 Northern	175	175	175	175	175
	2 Northern	172	172	172	172	172
	3 Northern	170	170	170	170	170
	4 Northern	165	165	165	165	165
	Number 5	155	155	155	155	155
	Number 6	151	151	151	151	151
	Feed	149	149	149	149	149
(2)	<u>Class I (Domestic Sales) 1/</u>					
	1 Hard	206	206	206	206	206
	1 Northern	206	206	206	206	206
	2 Northern	203	203	203	203	203
	3 Northern	201	201	201	201	201
	4 Northern	198	198	198	198	198
	Number 5	186	186	186	186	186
	Number 6	182	182	182	182	182
	Feed	180	180	180	180	180
	1 C.W. Garnet	201	201	201	201	201
	2 C.W. Garnet	199	199	199	199	199
	3 C.W. Garnet	197	197	197	197	197
	1 Alta. Red Winter	206	206	206	206	206
	2 Alberta Winter	205	205	205	205	205
	3 Alberta Winter	202	202	202	202	202
	1 C.W. Amber Durum	206	206	206	206	206
	2 C.W. Amber Durum	203	203	203	203	203
	3 C.W. Amber Durum	201	201	201	201	201
(3)	<u>Class II (Export Sales)</u>					
	(A) <u>United Kingdom Contract 2/</u>					
	1 Hard	206	206	206	206	206
	1 Northern	206	206	206	206	206
	2 Northern	203	203	203	203	203
	3 Northern	201	201	201	201	201
	(B) <u>To International Wheat Agreement Countries 3/</u>					
	1 Northern	198	198	198	198	198
	2 Northern	195	195	195	195	195
	3 Northern	193	193	193	193	193
	(C) <u>To All Other Countries</u>					
	1 Hard	218/5	218/4	215/5	212	210
	1 Northern	218/5	218/4	215/5	212	210
	2 Northern	215/5	215/4	212/5	209	207
	3 Northern	213/5	213/4	210/5	207	205
	1 C.W. Amber Durum	218/5	218/4	215/5	212	210
	2 C.W. Amber Durum	215/5	215/4	212/5	209	207
	3 C.W. Amber Durum	213/5	213/4	210/5	207	205

1/ Covers sales for seed and feed or to mills and includes 6 cents per bushel carrying charges. Sales prices to distillers at the discretion of the Board.

2/ Includes 6 cents per bushel carrying charges.

3/ Five cents per bushel carrying charge discontinued effective December 14, 1949.

THE CANADIAN FLOUR MILLING SITUATION

Production and Exports -

Canadian flour production during April amounted to 1,628,351 barrels, compared with 1,850,721 barrels in the preceding month and 1,582,191 barrels in April 1949. Mills reporting April operations had a total milling capacity of 97,775 barrels per 24-hour day, and over a 24-day working period in the month, 69.4 per cent of this was effective. Total production for the first nine months of the present crop year ending with April amounted to 15,680,547 barrels, almost unchanged from the output of the same nine months of 1948-49 when 15,645,691 barrels were produced.

According to Customs returns, exports of Canadian flour in April amounted to 731,959 barrels down somewhat from the 805,685 barrels exported in the preceding month, and the 871,271 barrels which were exported during the same month in the previous year. Total exports for the first nine months of 1949-50 were 7.3 million barrels, a decrease of 13 per cent when compared with the 8.3 million barrels for the same period in 1948-49.

Production and Exports of Wheat Flour, Canada 1938-39 to 1949-50

Crop Year	Production	Exports ^{1/}
- barrels of 196 pounds -		
1938-39	15,197,297	4,604,245
1939-40	17,778,311	6,781,367
1940-41	19,575,833	10,288,827
1941-42	19,905,741	10,205,778
1942-43	23,590,516	12,575,215
1943-44	24,303,833	13,464,371
1944-45	24,634,905	13,923,832
1945-46	26,435,341	14,470,177
1946-47	28,588,456	16,896,233
1947-48	24,159,696	13,661,573
1948-49	20,329,529	10,687,561
<u>1949-50</u>		
August	1,750,000	866,199
September	1,857,154	838,052
October	1,858,774	719,950
November	1,950,539	979,998
December	1,628,443	843,990
January	1,550,336	728,751
February	1,606,229	741,521
March	1,850,721	805,685
April	1,628,351	731,959
Totals	15,680,547	7,256,105
Same Period 1948-49	15,645,691	8,333,387

^{1/} Based on Custom returns. Exports for the crop years 1945-46 to 1948-49, and from August 1, 1949 to January 31, 1950 revised to remove effect of time lag in the returns made by Customs. Subsequent months to be revised as data become available.

THE UNITED STATES WHEAT SITUATION

Supply Situation - With carryover stocks at July 1, 1949 of 307 million, a 1949 outturn of 1,146 million and probable imports of one million bushels, United States supplies of wheat for 1949-50 amount to some 1,454 million bushels. Domestic requirements for the crop year have been placed at about 690 million bushels leaving some 764 million for export and carryover at the end of the crop year. According to the March-April "Wheat Situation" (published by the United States Department of Agriculture) if exports for April-June are at about the same rate as in the July-March period the total for the crop year would be about 310 million bushels. This would leave a carry-over on July 1, 1950 of about 450 million bushels compared with 307 million bushels on July 1, 1949.

United States Wheat Supplies (Estimates rounded to nearest million bushels)

	1949-50	1948-49
	- million bushels -	
Carryover at July 1	307	196
New Crop	1,146	1,314
Estimated Imports for Crop Year	1	1
Total Estimated Supplies	1,454	1,511
Less Estimated Domestic Requirements	690	700
Available for Export and Carryover	764	811
Deduct:		
Exports of Wheat as Grain July 1-April 30	225	304
Exports of Flour and Wheat By-products July 1-April 30 .	34	116
Total Exports Wheat and Wheat Products	259	420
Balance on May 1 for export and carryover	505	391

Exports of wheat and wheat products for the period July 1 to April 30 amounted to 259 million bushels, leaving a balance on May 1 for export and carryover of 505 million bushels.

Reduced Wheat Crop in Prospect - According to the Crop Reporting Board of the United States Department of Agriculture: "This year's winter wheat crop will be the smallest since 1943, according to May 1 indications. Growth and development of the crop generally was poor during April with production prospects declining in all but a few States. Production is estimated at 689,595,000 bushels. This is a decrease of 74 million bushels from the April 1 estimate and 212 million bushels, or 24 per cent below the crop of last year. Relatively light, unevenly distributed rainfall received in the Southern Plains area during April was generally inadequate to alter materially the adverse weather which has prevailed there since early last fall. The most pronounced reductions were in the Southern Plains, reflecting additional abandonment of acreage and lowering of yields. Production Kansas, Oklahoma and Colorado declined nearly 49 million bushels or 17.4 per cent from the combined production indicated in these States a month ago.

The Nation's winter wheat acreage remaining for harvest is estimated at 43,180,000 acres. Such an acreage would be 22 per cent below the record winter wheat acreage harvested in 1949 and the smallest in six years. The **portion of the crop that**

will not be harvested for grain is estimated at 18.5 per cent of the seeded acreage, compared with 11.1 per cent not harvested last year and the 10-year average of 10.8 per cent. Based upon crop conditions as of May 1, the indicated yield per harvested acre is 16.0 bushels compared with 16.3 bushels last year and the 10-year average yield of 17.5 bushels.

The heaviest acreage losses have occurred in the southern Great Plains States. Over half of the seeded acreage in Texas and New Mexico is expected to be lost with a considerable acreage 'in the balance', depending more than usual upon weather after May 1. In addition, relatively large acreage losses have occurred in western Oklahoma, southeastern Colorado, and southwestern and central Kansas where continued dry weather and greenbug infestations have taken a heavy toll this spring.

Below normal temperatures have retarded growth of the crop over much of the country. This could prove detrimental to the crop in some of the northern and eastern States. However, the lower temperatures have been generally favourable in the dryer areas, retarding plant growth and slowing evaporation, thus conserving the limited reserves of soil moisture for later growth.

Production prospects improved in Minnesota, Iowa, Maryland, West Virginia, and Tennessee, and remain unchanged from a month earlier in Nebraska. In the Eastern Corn Belt States, where moisture supplies have been ample to excessive, wheat growth has been slow, many fields are thin and spotted, and parts of fields have yellowed. The crop in the North Atlantic States suffered from April freezes, while in the southeastern States, dry weather caused some deterioration. In the Pacific Northwest area, moisture supplies are adequate, but the season is late and the crop has developed slowly.

Prospects vary considerably by States. Wheat in Nebraska has made generally good growth, although some stands were thinned by winterkilling. Crop prospects on May 1 were the same as on April 1.

Progress of the crop in Kansas, except the northwestern area, was mostly unsatisfactory due largely to limited rainfall, cold weather, and insects. Although the crop generally has not made as rank growth as usual, early varieties are beginning to head in southern areas and are jointing in most other areas. Stands are thin and spotted in central and southwestern sections of the State.

Crop production prospects in Oklahoma are the poorest since 1943, due mainly to infestations of greenbugs and mites, and prolonged drought. The crop is headed or heading in all except the extreme northwest counties. Straw is reported to be short. In practically all areas of Texas, except the High Plains, prospects were improved by the drought-breaking rains of mid-April. Harvest of a fair crop seems assured except in the important north High Plains area where three-fourths of the planted acreage has been reported abandoned and yields are expected to be very low. The bulk of the Colorado crop this year will be produced in the north-eastern quarter of the State with production in the southeast expected to be light. Most of the wheat remaining for harvest has satisfactory prospects.

Seeding of spring wheat has been seriously delayed in the important Minnesota-Dakota-Montana area and farmers may find it impractical to seed their full intended acreages. With only average yields in the spring wheat area, production of all wheat may fall below a billion bushels for the first time in 7 years. The first official estimate of spring wheat production is scheduled for June 9."

Chicago and Minneapolis Cash Wheat -

Movement of cash wheat on the Chicago market began slowly during the period April 25-May 26 but became fairly active in the weeks that followed with more free wheat in evidence. It was observed for the first time in some months that hard winter wheat sold at a discount under red winter wheat during this period. Although mills bought rather freely during the week ending May 19, on the whole mills and elevators were in the market in a moderate way only. Country movement was generally light.

Demand for cash wheat was active on the Minneapolis market during the period under review, and receipts at spring wheat terminals were moderately large for this season of the year. This has resulted principally from larger marketings of spring wheat following rather liberal redemption prior to April 30 of wheat under loan and stored in country elevators. Price quotations of No. 1 Dark Northern on the Minneapolis cash market fluctuated between \$2.29 1/2 and \$2.41, during this period. The tone was generally firm and prices at the end of the period were at about the same level as at the beginning.

Daily Cash Wheat Prices on the Chicago and Minneapolis Markets

1950	Chicago		Minneapolis	
	Grade	Price	Grade	Price
April 25	None		1 Dark Northern	230 1/2 - 234 1/2
26	2 Red	233	1 Dark Northern	231 1/4 - 235 1/4
27	2 Red	232	1 Dark Northern	230 7/8 - 234 7/8
28	2 Red	232	1 Dark Northern	229 1/2 - 232 1/2
29	2 Red	235	1 Dark Northern	230 - 233
May 1	2 Red	235 1/4	1 Dark Northern	230 1/4 - 233 1/4
2	3 Red	233 1/2	1 Dark Northern	230 7/8 - 233 7/8
3	2 Mixed	230	1 Dark Northern	231 5/8 - 233 5/8
4	3 Red	231 1/2	1 Dark Northern	232 1/2 - 235 1/2
5	3 Red	233	1 Dark Northern	235 1/2 - 238 1/2
6	3 Red	234 1/4	1 Dark Northern	238 - 241
8	3 Red	233 3/4	1 Dark Northern	237 5/8 - 240 5/8
9	2 Hard	235 1/2	1 Dark Northern	237 1/4 - 240 1/4
10	None		1 Dark Northern	236 5/8 - 239 5/8
11	None		1 Dark Northern	236 3/8 - 238 3/8
12	3 Red	234	1 Dark Northern	233 7/8 - 235 7/8
13	3 Red	233 1/2	1 Dark Northern	233 1/8 - 235 1/8
15	2 Yellow Hard	235 1/4	1 Dark Northern	233 1/2 - 234 1/2
16	None		1 Dark Northern	232 3/4 - 233 3/4
17	3 Red	231 1/2	1 Dark Northern	233 3/8 - 234 3/8
18	3 Yellow Hard	231	1 Dark Northern	234 1/2 - 235 1/2
19	2 Hard	232	1 Dark Northern	235 7/8 - 236 7/8
20	2 Hard	232	1 Dark Northern	236 - 237
22	3 Yellow Hard	229 1/4	1 Dark Northern	233 7/8 - 235 7/8
23	4 Red	219	1 Dark Northern	233 1/8 - 235 1/8
24	2 Red	228 1/2	1 Dark Northern	235 3/4 - 237 3/4
25	None		1 Dark Northern	233 3/4 - 236 3/4
26	None		1 Dark Northern	231 3/4 - 234 3/4

Chicago Wheat Futures -

There were marked fluctuations in the Chicago wheat futures market during the period April 28-May 27 with May futures reaching a new high for the crop year towards the middle of the period. Unsatisfactory weather developments and adverse crop reports on wheat were influential price factors. Most futures, particularly May, eased somewhat towards the end of the month, following on more favourable reports relative to crop conditions.

Chicago Wheat Futures, High Points of Closing

1950	May	July	September	December	March
- cents and eighths per bushel -					
April 28	230/7	214/4	214/3	215/6	
29	232	217/5	217/6	218/6	
May 1	232/6	220/1	219/2	220/4	
2	231/3	218/4	217/4	218/5	
3	230/3	217/2	216	217/6	218
4	230	217	216/4	218	218
5	232/5	221/2	219/6	221/2	221
6	234/2	223/1	222/1	224/2	-
8	234/2	222/3	221/1	223/1	222/5
9	233/6	221/3	220/5	221/4	222/1
10	235/4	222	220/7	222/6	222/2
11	235/2	221/2	220/4	222/2	221/4
12	234	218/5	218	219/5	219/1
13	234/6	218/6	218/1	220	219/2
15	235/4	219	218/4	220/4	220
16	234/3	217/6	217/3	219/2	218/1
17	233/7	217/1	216/7	219	217/7
18	232	215/2	215/2	217/5	216/6
19	231/4	215/2	215/6	218/1	217/5
20	231/4	215/1	215/5	218	217/4
22	229	214/5	214/6	217/3	217/2
23		215/4	216/2	218/5	218/4
24		218/4	219/3	222	221/6
25		217/4	218	220/4	220/2
26		214/2	216/7	219/4	219/3
27		216/2	217/1	219/5	219/4

THE ARGENTINE WHEAT SITUATION

Supply Position - While no official estimates are being issued currently by the Argentine Government, the March-April issue of 'The Wheat Situation' published by the United States Department of Agriculture contains an estimate of the production and disposition of the Argentine wheat crop. The data are presumably the latest available and have been used (with the exception of exports for which a current figure has just come to hand) in the following supply table.

Argentine Wheat Supplies ^{1/}
(Estimates rounded to nearest million bushels)

	1949-50	1948-49
	- million	bushels -
Carryover at December 1	50	75
New Crop	210	190
Total Estimated Supplies	260	265
Less Estimated domestic requirements	135	147
Available for export and carryover	125	118
Deduct:		
Exports of wheat as grain Dec. 1, 1949--April 30, 1950.	45	34
Exports of wheat flour in terms of wheat		
December 1, 1949--April 30, 1950	<u>2/</u>	<u>2/</u>
Total Exports Wheat and Wheat Flour	45	34
Balance on May 1 for export and carryover	80	84

^{1/} Revised. ^{2/} Less than 10,000 bushels.

With an estimated carryover of 50 million bushels at December 1, 1949 and a new crop of some 210 million bushels, Argentina's supply of wheat for the current crop year is placed at 260 million bushels. With probable domestic disappearance estimated at 135 million bushels, the amount remaining for export and carryover stands at 125 million bushels. Wheat exported as grain during the period December 1, 1949 to April 30, 1950 amounted to about 45 million bushels, some 11 million greater than for the same period a year ago. Exports of wheat flour were negligible in this period in both crop years. The balance remaining on May 1, 1950 for export and carryover amounts to some 80 million bushels as against 84 million at the same time last year.

The following review of the grain situation in the Argentine has been extracted from a report forwarded May 17, 1950 by Mr. W. B. McCullough, Commercial Secretary (Agriculture) at Buenos Aires and is reproduced herewith by kind permission of the Trade Commissioner Service.

Note: Where possible conversions to Canadian measures have been made for the convenience of readers. (Pesos converted to dollars at the nominal quotation by the Bank of Canada, May 20, 1950 at 1 peso equals \$.3275).

Weather and Crops - Throughout April and early May weather conditions continued generally favourable in the main cereal zones although soil moisture is unevenly distributed throughout the country. Rainfall was normal but more is needed to build up a satisfactory degree of reserve moisture before winter, particularly for continuance of pastures. In the Province of Entre Rios there were very heavy rains and this province has received nearly half the normal annual rainfall. However, the amount of precipitation declined towards the interior and in the north and center of La Pampa dry weather and strong winds nullified the effects of earlier rains; this zone has been suffering from drought for the past two years. In some districts the rains have not penetrated to any depth due to the hardness of the subsoil following the drought. Light frosts were registered to the west and south but, on the whole, temperatures have been above normal.

In the chief grain zones, ploughing and seeding are progressing actively and the early-sown fields for winter pasture have developed well. With the encouragement offered by the substantial increase in producers' prices for the next season and the early announcement, it is expected that there will be a general overall increase in grain acreages, but it is doubtful whether the goals set by the government will be reached. President Peron asked for a 25 per cent increase in wheat sowings to bring acreage up to the traditional 7 million hectares (17.3 million acres). However, it is the opinion in trade circles that even with favorable weather for seeding, the maximum figure for the coming season will not reach 6.5 million hectares (16.1 million acres).

Sales to Chile - With a wheat deficit of an estimated 7.3 million bushels due to a poor crop, Chile has, of late, been purchasing Argentine wheat. It is reported that with the low stocks prevailing here, Argentina will be able to supply only some 1.8 million bushels and later reports state that the Chilean authorities are considering the purchase of 120,000 bags of Argentine flour for use in the Magallanes region.

Grain Shipments - Shipments of wheat and corn during April compare favorably with those registered during the first three months of the year, as is shown in the following table:

	<u>Wheat</u>	<u>Corn</u>
	- 000 bushels -	-
January	8,010	3,529
February	12,002	4,117
March	13,379	5,569
April	7,815	6,579

Shipments of these grains show considerable improvement over the same period last year, although falling short of the 1948 level:

	<u>Wheat</u>	<u>Corn</u>
	- 000 bushels -	-
Four months 1950	41,206	19,794
Four months 1949	28,329	15,669
Four months 1948	45,890	37,232

In the following table of grain shipments for 1950 up to the end of April it will be noted that flax appears for the first time in three years:

Editor's Note: The following table evidently covers slightly different period or is compiled on different basis as totals for the four months do not agree exactly with those given above.

Destination	Wheat	Corn	Flax	Oats	Rye	Barley	Wheat Flour
	- 000 bushels -						196 lb. bbl.
United Kingdom	-	7,304	331	-	-	-	-
France	-	3,756	-	-	-	-	-
Belgium	21	2,032	-	45	47	19	-
Italy	8,044	300	-	1,340	793	-	-
Germany	4,750	-	-	-	-	-	-
Netherlands	818	1,357	-	-	-	-	-
Rest of Europe	4,261	2,810	-	3,129	2,273	869	1,698
Brazil	11,464	-	-	-	-	-	-
Others	12,102	1,099	-	458	-	1,234	-
Totals	41,460	18,658	331	4,972	3,113	2,122	1,698
Same period 1949	28,083	15,475	-	1,956	1,322	3,142	6,749

URUGUAYAN SITUATION

The following information has also been supplied by Mr. McCullough, Canadian Commercial Secretary (Agriculture) at Buenos Aires.

The Uruguayan Department of Agriculture recently published their first estimate on grain production for the 1949-50 crop. According to the official announcement acreages were on the same level as the previous year but owing to drought, yields were reduced. Wheat production is down by 17 per cent but still sufficient for home requirements and leaves a small surplus for export. Uruguay is reported to have sold 394,000 barrels of wheat flour to Brazil at U.S. \$ 11.82 per barrel f.o.b., in exchange for wood and yerba mate. Flax production is down by 35 per cent. Following are the official estimates for the 1949-50 crop as compared with the previous year.

Uruguayan Grain Production 1949-50

	Acres		Production		Average Yield	
	1949-50	1948-49	1949-50	1948-49	1949-50	1948-49
	- 000 -		- 000 bushels -		bushels per acre	
Wheat	1,306	1,279	15,769	19,044	12	15
Flax	418	619	3,009	4,596	7	7
Oats	257	205	4,070	3,307	16	16
Barley	33	29	500	399	15	14
Rye	1	1/	11	3	11	-

1/ Less than 1000.

THE AUSTRALIAN WHEAT SITUATION

Supply Position - With a carryover of 19 million bushels at November 30, 1949 and a new crop estimated at 218 million the total Australian wheat supply for the current crop year amounts to some 237 million bushels. Domestic requirements are placed at 83 million bushels leaving approximately 154 million available for export and carryover. Total exports of wheat and flour in terms of wheat from December 1, 1949 to April 29, 1950 amounted to 44 million bushels, about three million less than shipments during the same period of 1948-49. The balance remaining on May 1 for export and carryover into the next crop year stood at 110 million bushels as against 92 million on the same date last year.

Australian Wheat Supplies (Estimates rounded to nearest million bushels)

	1949-50	1948-49
	- million bushels -	
Carryover at November 30 (including flour as wheat) ..	19	26
New Crop 1/	218	191
Total Supply	237	217
Less Estimated domestic requirements	83	78
Available for export and carryover	154	139
Deduct:		
Exports of wheat as grain December 1-April 29	32	32
Exports of wheat flour in terms of wheat Dec.1-Apr.29	12	15
Total Exports Wheat and Wheat Flour	44	47
Balance on May 1 for Export and Carryover	110	92
1/ Revised April 17, 1950.		

Australian Cable - The following cable dated May 16 has been received from the Canadian Trade Commissioner in Melbourne:

"Australian wheat stocks at April 29th totalled 153 million bushels. Wheat exports from December 1st, 1949 to April 29th totalled 31,653,000 bushels with shipments during preceding four weeks mainly to India, Egypt and Japan. Flour exports same period 223,940 long tons (12,039,014 bushels) with shipments during preceding four weeks 9,473 (509,268 bushels) to Malaya, 6,445 (346,483 bushels) to China and 6,156 (330,947 bushels) to Ceylon, none to United Kingdom."

Sale to Egypt - It is reported that the Australian Wheat Board has sold 100,000 long tons (3,733,200 bushels) of Australian wheat and 100,000 tons of flour to Egypt for shipment by end July 1951--price under International Wheat Agreement terms.

Australia's Wheat Crop Second Highest on Record - According to the Australian Wheat Board Gazette, the 1949 wheat crop, harvested in December, resulted in a harvest of magnitude second only to the record yield in 1947-48 when, from a total crop of about 220 million bushels, 204½ million bushels of wheat were received by the Board, which was then operating under the Acquisition Regulations.

It is expected that final deliveries to No. 13 Pool (Season 1949-50) may slightly exceed 202 million bushels. The total crop, including wheat held on the farms for seed and feed purposes, should thus be about 217 to 218 million bushels.

CALENDAR OF WHEAT EVENTS

April 25 The official March forecast of the acreage expected to be seeded to wheat in the United Kingdom by June 1950 stands at 2.4 million acres. The acreage seeded to wheat in 1949 was 1.9 million acres.

May 1 The 1950 season of navigation at the head of the lakes was opened on Saturday, April 29, by the arrival of the freighter S.S. Renvoyle from Toronto. This is the latest opening since 1939 when the first vessel entered the twin city ports on May 1st.

5 The United States Department of Agriculture states the first official estimate of wheat acreage in India for the 1949-50 season is 22,109,000 acres, 4.7 per cent greater than last season's wheat acreage. The crop is placed at around 213 million bushels. The government buying rate for the 1949-50 crop year has been announced at \$2.14—\$2.45 per bushel for red wheat.

11 On the basis of their intentions at April 30, Canadian farmers will seed 26.3 million acres of spring wheat in 1950, a decrease of about 2 per cent from the seeded acreage of 1949. The distribution of intended spring wheat acreage in the Prairie Provinces is as follows (million acres): Manitoba 2.9; Saskatchewan 15.9; and Alberta 7.4.

It is estimated that winterkilling of fall wheat in Ontario amounted to 106,000 acres or 11 per cent of the area sown in the autumn of 1949. This leaves 860,000 acres for harvest in 1950 as compared with 805,000 acres in 1949.

17 The United States Bureau of the Census places March wheat flour production at 20 million sacks, 3 per cent above February, but 2 per cent below March of 1949. This was the lowest March level in recent years. Flour mills operated at 63.6 per cent of capacity in March compared with 66.0 per cent the previous month.

18 Seaboard wheat stocks at 18.4 million bushels were 1.8 million greater than a week ago. Receipts of wheat at forward positions during the week of 5.3 million bushels exceeded outgoing shipments of 3.5 million bushels.

25 The Board of Grain Commissioners for Canada reports that grain vessel loading records have been made and broken in succession this season by the twin ships the S.S. Coverdale and S.S. Hochelaga. On May 25 the S.S. Coverdale cleared the Lakehead with the highest grain tonnage yet reported (606,000 bushels of wheat).

29 According to a Broomhall report the prospective French wheat crop is expected to reach 328 million bushels, which would be well above last year's crop variously estimated at 275 to 295 million bushels. With a crop of 328 million bushels it is felt sizeable quantities of wheat will be available for export. France's allocation for export under the I.W.A. for the 1949-50 season was placed at 3.3 million.

Mexico's Agriculture Minister recently estimated the 1950 wheat crop at 553 thousand tons compared with last year's crop of 503 thousand tons. The increase, however, is much smaller than the 200 thousand ton increase originally forecast. Mexico is still a deficit wheat producing country; up to 1949 she imported about 250 thousand tons of wheat annually. The government's program aims at self-sufficiency by 1952.

1. The first part of the report is devoted to a general description of the project and its objectives.

2. The second part of the report describes the methodology used in the study, including the selection of subjects and the procedures followed.

3. The third part of the report presents the results of the study, which are discussed in detail in the following sections.

4. The fourth part of the report discusses the implications of the findings and the conclusions drawn from the study.

5. The fifth part of the report contains the references and the appendix, which provide additional information on the study.

6. The sixth part of the report is a summary of the main findings and conclusions of the study.

7. The seventh part of the report is a list of the abbreviations and symbols used throughout the report.

8. The eighth part of the report is a list of the figures and tables included in the report.

9. The ninth part of the report is a list of the names of the authors and their affiliations.

10. The tenth part of the report is a list of the names of the reviewers and their comments.



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