

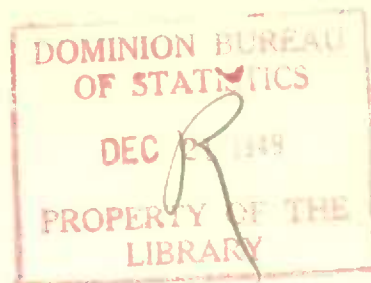
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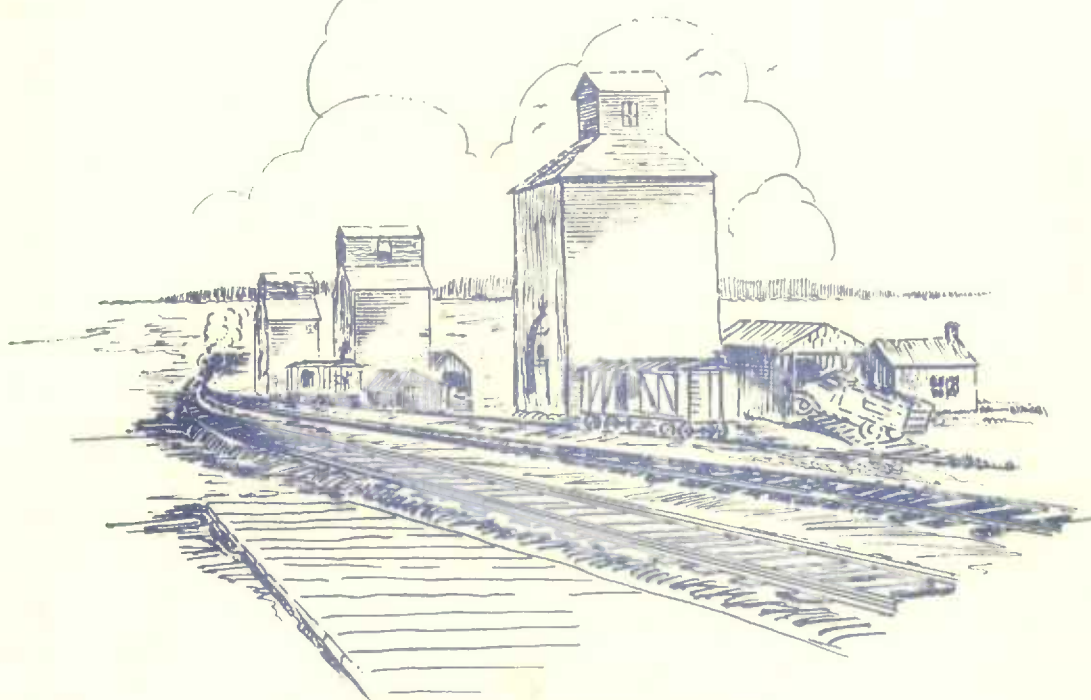


CANADA

DOMINION BUREAU OF STATISTICS
AGRICULTURE DIVISION



MONTHLY REVIEW OF THE WHEAT SITUATION



NOVEMBER, 1949

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

DOMINION BUREAU OF STATISTICS
DEPARTMENT OF TRADE AND COMMERCE

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Prepared in Crops Section, Agriculture Division,
Dominion Bureau of Statistics, Ottawa

MONTHLY REVIEW OF THE WHEAT SITUATION

NOVEMBER 1949

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WORLD WHEAT SITUATION

1949 World Wheat Crop Revised Upwards -

Based on the latest available information, 1949 world wheat production is now estimated at 6,185 million bushels, an increase of 170 million bushels over the 1935-39 average. The upward revision of some 100 million bushels over the forecast made in September is due principally to higher estimates for some European countries and improved prospects in important producing southern hemisphere countries. If present indications are fully realized, the 1949 world wheat crop will be only some 200 million bushels under the large outturn of 1948. Revised production totals for North America have reduced earlier estimates by 7 million bushels with Canada accounting for some 4 million bushels of the drop. The United States crop for the sixth consecutive year has topped a billion bushels, compared with the 1935-39 average of 759 million bushels. Canada's production of 367 million bushels, though smaller than that of the war years, is still above the 1935-39 average of 312 million bushels. Mexico's production, slightly less than last year's outturn, is also above the 1935-39 average.

Wheat production in Europe is now estimated at 1,465 million bushels, compared with the prewar average of 1,595. The reduction is attributed to smaller acreage, with yields for the continent apparently near the prewar level. Unusually favourable conditions over some areas resulted in record or near record yields. In the Netherlands, Belgium, Denmark and the United Kingdom yields were generally higher than those experienced for many years. Drought in Spain and Portugal has been responsible for below average yields but even so outturns were considerably better than anticipated on the basis of earlier reports. In the Balkan countries yields are also believed to be below average.

World Wheat Production, Average 1935-39, Annual 1947-49 ^{1/}

| | Average 1935-39 | 1947 | 1948 | 1949 |
|------------------------------------------|--------------------|-----------|-----------|-----------|
| - thousand bushels - | | | | |
| North America | 1,086,000 | 1,725,000 | 1,700,000 | 1,511,000 |
| South America | 281,000 | 321,000 | 270,000 | 275,000 |
| Europe | 1,595,000 | 1,005,000 | 1,455,000 | 1,465,000 |
| U.S.S.R. (Europe and Asia) . | 1,240,000 | 850,000 | 1,025,000 | 1,100,000 |
| Asia | 1,499,000 | 1,526,000 | 1,593,000 | 1,480,000 |
| Africa | 143,000 | 128,000 | 147,000 | 156,000 |
| Oceania | 176,873 | 224,655 | 195,170 | 195,600 |
| Estimated World Total ^{2/} | 6,015,000 | 5,780,000 | 6,385,000 | 6,185,000 |

^{1/} Based on estimates of the Office of Foreign Agricultural Relations, United States Department of Agriculture.

^{2/} Estimated totals (which are rounded to millions) include allowances for any missing data for the areas shown.

Wheat production in Africa is placed at about 156 million bushels, which is somewhat above average as well as larger than the 1948 crop. In South America where the harvest is just getting under way growing conditions have generally been favourable for grain. Indications are that a wheat outturn of 275 million bushels is likely. Conditions in the Argentine wheat areas point to above-average yields from a considerably below-average acreage. Production in Australia is estimated to be about the same as in 1948 when an above-average crop was harvested.

International Wheat Agreement Sales and Purchases - According to an official statement, sales (including adjustments) under the Agreement have been made in the following amounts during the period August 1 to November 25: Canada 23.6 million bushels; United States 17.7 million bushels, Australia 7.5 million bushels. The following importers who belong to the Agreement absorbed these sales: Belgium, Bolivia, Cuba, Denmark, Dominican Republic, Ecuador, El Salvador, Guatemala, Ireland, Israel, Mexico, Netherlands, Nicaragua, Norway, Panama, Peru, Portugal, Saudi Arabia, Switzerland, Union of South Africa, United Kingdom, Venezuela. The major portion of the sales reported during the period were taken up by the following countries: Belgium 7.2 million bushels, Ireland 2.1 million bushels, Israel 2.2 million bushels, Mexico 2.4 million bushels, Netherlands 4.3 million bushels, Norway 2.4 million bushels, Portugal 2.8 million bushels, Switzerland 3.9 million bushels, Union of South Africa 7.6 million bushels, and the United Kingdom 8.4 million bushels.

THE CANADIAN SITUATION

Increased Grasshopper Menace in Prairie Provinces Forecast for 1950 -

According to preliminary surveys and forecasts on the grasshopper situation in the Prairie Provinces in 1950 a more widely spread infestation is expected than that which occurred in 1949. In Manitoba it is estimated that twice the acreage of crop land infested by grasshopper eggs in 1949 will be affected in 1950. Some 11,000 square miles of land show evidence of varying degrees of grasshopper infestation. The area of light infestation is 25 per cent greater than a year ago, while that of moderate infestation is six times greater. The heavily infested area is twice as large as a year ago. The extent of infestation is confined to the southern part of the province with the south-central section comparatively free of grasshopper eggs. It has been emphasized that weather conditions will not affect the viability of the eggs, but prevailing weather after hatching will greatly influence the extent of damage by the newly emerged grasshoppers.

In Saskatchewan, almost the entire area south of Prince Albert and west of a line through Wakaw, Indian Head, Fillmore and Carnduff shows evidence of infestation according to the preliminary forecast map.. Intensity of the 1950 infestation will vary from very light to continuous and severe. In the Weyburn, Moose Jaw, Regina and other south-central and south-east regions as well as in the Swift Current and Kerrobert regions the probable infestation will be greater than in 1949.

It is believed that cultural control may prevent heavy damage from the forecast increase in the stubble grasshopper population for 1950. Where an infestation of this type is forecast the recommended practice is not to sow the stubble field but to trap-strip the field early in the spring so as to concentrate the nymphs in a localized area for poisoning before they are able to move into nearby crops. It has been stated that where grasshopper infested stubble was sown in 1949 in Saskatchewan as much as 50 per cent of the crop was destroyed and the remainder saved only by intensive poisoning.

No reports on grasshopper conditions in the province of Alberta have yet been received.

Supply Position -

Based on the November estimate of production the quantity of wheat available for export and carry-over for the current crop year is now placed at 319.1 million bushels. Exports of wheat and flour in terms of wheat during the first quarter of 1949-50 amounted to 63.9 million, 18.3 million more than during the same period last year. The balance remaining on November 1, 1949 for export and carry-over was 255.2 million bushels.

Canadian Wheat Supplies

| | 1949-50 | 1948-49 |
|-----------------------------------------------------------|---------------------|-----------------|
| | - million bushels - | |
| Carry-over in North America July 31 | 98.7 | 77.7 |
| New Crop | 367.4 | 393.3 |
| Imports of wheat and wheat flour, September | <u>1/</u> | 0.3 |
| Total Supply | 466.1 | 471.3 |
| Estimated Domestic Requirements | 147.0 <u>2/</u> | 141.0 <u>2/</u> |
| Available for export or carry-over | 319.1 | 330.3 |
| Deduct: | | |
| Overseas clearances of wheat as grain Aug.1-Oct.31 | 50.0 | 31.2 |
| Exports of Canadian wheat to U.S., Aug. 1-Oct. 31 | 2.6 | <u>1/</u> |
| Total Wheat Exports | 52.6 | 31.2 |
| Exports of wheat flour in terms of wheat Aug.1-Oct.31 ... | 11.3 | 14.4 <u>3/</u> |
| Total Exports Wheat and Wheat Flour | 63.9 | 45.6 |
| Balance on November 1 for Export or Carry-Over | 255.2 | 284.7 |

1/ Less than 50,000 bushels.

2/ Tentative estimate.

3/ Adjusted for time-lag in returns made by Customs.

November Estimate of Canada's 1949 Wheat Crop -

Canada's 1949 wheat crop is now placed at 367.4 million bushels according to the third estimate of production of 1949 field crops issued by the Dominion Bureau of Statistics on November 17, 1949. The 1949 wheat crop is 25.9 million bushels less than the 1948 outturn of 393.3 million bushels. (The November estimate is 4.2 million bushels less than that issued in September, with increases in Ontario fall wheat and Alberta spring wheat being more than offset by decreases of 4 million and 2 million bushels respectively in the estimate of the Saskatchewan and Manitoba wheat crops.) This year's acreage based on the June 1 survey is 3.4 million greater than that of 1948, but despite this, reduced yields per acre in the Prairie Provinces resulted in lower overall outturns.

In the Prairie Provinces the wheat crop is now expected to yield 337 million bushels as compared with the 363 million bushel crop of 1948. The estimated average yield per acre of wheat in the Prairie Provinces this year is 12.7 bushels per seeded acre, with Manitoba averaging 18, Saskatchewan 11.6, and Alberta 12.8 bushels per seeded acre. The wheat crop in the Prairie Provinces contains a small proportion of fall wheat, grown chiefly in Alberta, and included under the spring wheat classification in this estimate. The estimated 1949 production of wheat in the remaining provinces of Canada is 30.4 million bushels of which 24.7 million bushels is Ontario fall wheat.

November Estimate of Production of Canadian Wheat, 1949 Compared with Revised Estimate for 1948

| | Area | | Yield Per Acre | | Production | |
|--------------------------|------------|------------|----------------|------|-------------|-------------|
| | 1948 | 1949 | 1948 | 1949 | 1948 | 1949 |
| | acres | | bushels | | bushels | |
| Canada | | | | | | |
| Fall wheat | 858,500 | 805,000 | 30.3 | 30.7 | 26,013,000 | 24,714,000 |
| Spring wheat | 23,247,400 | 26,735,700 | 15.8 | 12.8 | 367,332,000 | 342,692,000 |
| All wheat | 24,105,900 | 27,540,700 | 16.3 | 13.3 | 393,345,000 | 367,406,000 |
| Prairie Provinces | | | | | | |
| Manitoba | 2,397,000 | 3,167,000 | 23.8 | 18.0 | 57,000,000 | 57,000,000 |
| Saskatchewan | 14,389,000 | 15,737,000 | 13.3 | 11.6 | 191,000,000 | 183,000,000 |
| Alberta | 6,259,000 | 7,586,000 | 18.4 | 12.8 | 115,000,000 | 97,000,000 |
| Total | 23,045,000 | 26,490,000 | 15.8 | 12.7 | 363,000,000 | 337,000,000 |

Area and Condition of Fall Wheat -

The area sown to fall wheat in the autumn of 1949 is estimated at 966,000 acres, an increase of 119,000 or 14 per cent as compared with the area sown in 1948, viz., 847,000 acres. The condition at October 31 was reported at 106 per cent of average as compared with 80 per cent in 1948. These data on fall wheat refer to Ontario only. Fall wheat in western Canada has been included under spring wheat.

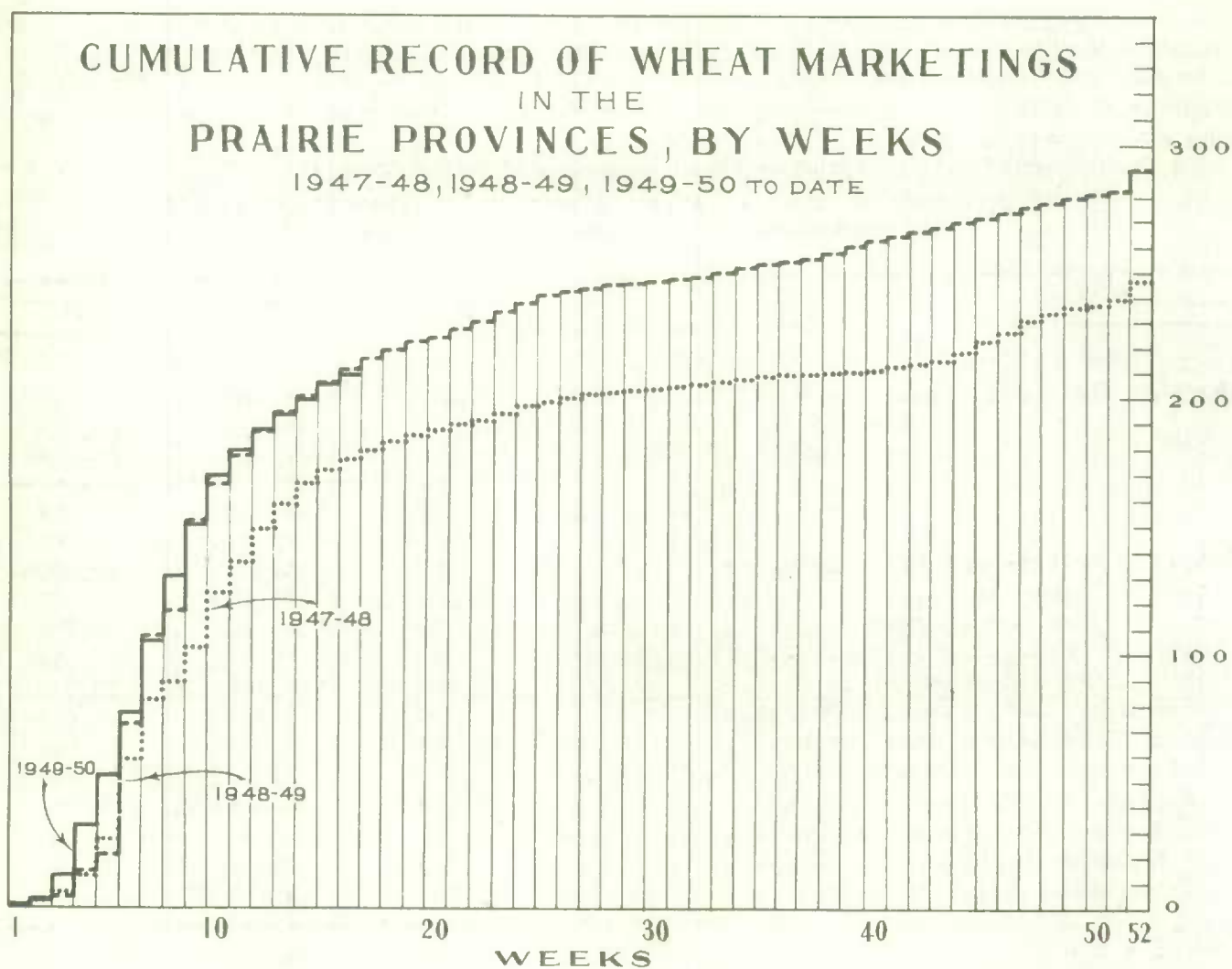
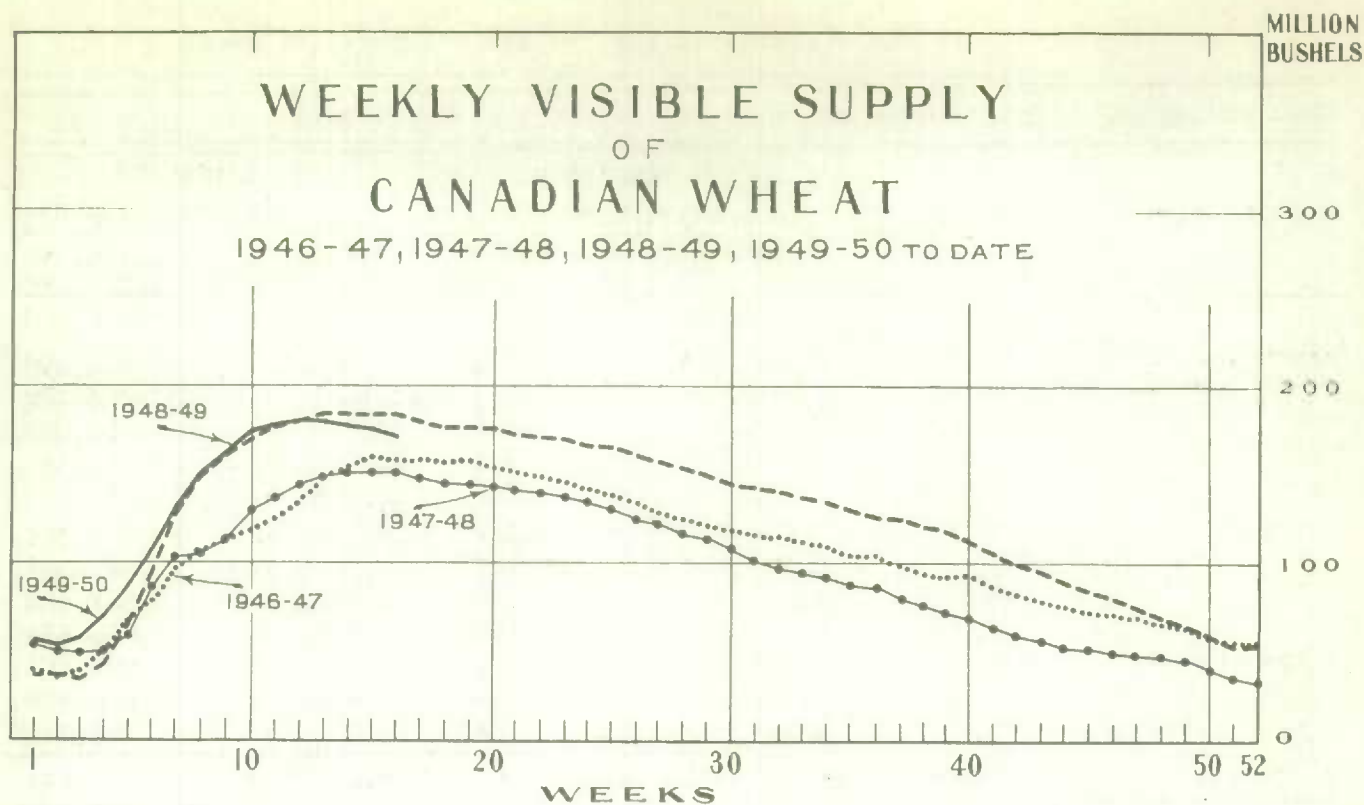
Farmers' Marketings of Wheat in the Prairie Provinces, 1949-50

| Week ending | Manitoba | Saskatchewan | Alberta | Total | Last Year |
|-------------|------------|--------------|------------|-------------|-------------|
| - bushels - | | | | | |
| August 1-4 | 86,906 | 396,425 | 857,679 | 1,341,010 | 1,046,773 |
| 11 | 1,487,047 | 408,852 | 352,356 | 2,248,255 | 1,396,993 |
| 18 | 3,916,751 | 2,375,960 | 2,036,147 | 8,328,858 | 2,120,360 |
| 25 | 9,032,150 | 6,744,337 | 3,980,747 | 19,757,234 | 10,442,807 |
| September 1 | 6,953,093 | 8,751,113 | 4,960,194 | 20,664,400 | 26,046,398 |
| 8 | 5,104,625 | 12,005,438 | 7,572,940 | 24,683,003 | 31,488,520 |
| 15 | 3,394,999 | 16,809,771 | 7,977,799 | 28,182,569 | 34,480,088 |
| 22 | 1,511,831 | 15,854,167 | 8,051,995 | 25,417,993 | 27,549,617 |
| 29 | 1,249,693 | 11,832,544 | 6,596,577 | 19,678,814 | 17,847,118 |
| October 6 | 781,873 | 12,004,362 | 6,543,917 | 19,330,152 | 14,008,086 |
| 13 | 531,130 | 5,224,134 | 4,027,785 | 9,783,049 | 11,245,588 |
| 20 | 431,778 | 4,307,972 | 3,302,630 | 8,042,380 | 9,262,652 |
| 27 | 174,784 | 3,804,123 | 2,518,155 | 6,497,062 | 7,866,534 |
| November 3 | 293,156 | 3,797,858 | 1,935,700 | 6,026,714 | 6,628,192 |
| 10 | 229,101 | 3,436,128 | 1,762,805 | 5,428,034 | 4,974,179 |
| 17 | 265,037 | 2,544,609 | 1,199,154 | 4,008,800 | 4,798,844 |
| Total | 35,443,954 | 110,297,793 | 63,676,580 | 209,418,327 | 211,202,749 |

Deliveries of wheat in the Prairie Provinces have continued the usual seasonal decline with only 4.0 million bushels marketed during the week ending November 17. Despite this year's smaller crop total deliveries of 209.4 million bushels from August 1 to November 17 are only 1.8 million bushels less than during the same period of 1948-49.

Visible Supply of Canadian Wheat, November 17, 1949 Compared With
Approximately the same Date, 1948 and 1947

| | 1949 | 1948 | 1947 |
|--------------------------------------------|---------|---------|---------|
| - 000 bushels - | | | |
| Country Elevators - Manitoba | 6,497 | 12,447 | 6,102 |
| Saskatchewan | 44,660 | 59,598 | 42,505 |
| Alberta | 37,201 | 44,767 | 37,997 |
| T o t a l | 88,358 | 116,812 | 86,604 |
| Interior Private and Mill Elevators | 3,987 | 5,014 | 3,480 |
| Interior Terminals | 101 | 128 | 93 |
| Vancouver-New Westminster | 11,248 | 4,744 | 2,736 |
| Churchill | 126 | 99 | 110 |
| Fort William and Port Arthur | 11,836 | 16,499 | 18,648 |
| In Transit - Rail (Western Division) | 12,120 | 9,700 | 7,615 |
| Eastern Elevators - Lake Ports | 18,958 | 9,238 | 11,849 |
| St. Lawrence and Seaboard Ports | 15,425 | 3,669 | 2,692 |
| In Transit - Lake | 5,808 | 8,857 | 5,056 |
| In Transit - Rail (Eastern Division) | 2,041 | 1,847 | 2,032 |
| United States Ports | 936 | 4,411 | 8,541 |
| In Transit - U.S.A. | 221 | 2,981 | 1,407 |
| T o t a l | 171,165 | 183,999 | 150,863 |



Grading of Wheat Inspected, August-October 1949 and 1948

| | Inspections - | | | |
|-------------------------------------|---------------------------|----------|---------------------------|----------|
| | August to October 1949 | | August to October 1948 | |
| | Cars | Per Cent | Cars | Per Cent |
| 1 Manitoba Northern | 12,059 | 18.3 | 14,557 | 28.5 |
| 2 Manitoba Northern | 37,349 | 56.7 | 22,281 | 43.6 |
| 3 Manitoba Northern | 7,082 | 10.8 | 4,043 | 7.9 |
| 4 Manitoba Northern | 1,132 | 1.7 | 456 | 0.9 |
| Garnet | 804 | 1.2 | 233 | 0.4 |
| Amber Durum | 3,550 | 5.4 | 4,243 | 8.3 |
| Alberta Winter | 569 | 0.9 | 648 | 1.3 |
| Toughs - All Varieties and Grades . | 1,333 | 2.0 | 3,452 | 6.8 |
| All others | 1,942 | 3.0 | 1,177 | 2.3 |
| T o t a l | 65,820 | 100.0 | 51,090 | 100.0 |

Of the 65,820 cars of wheat inspected by the Board of Grain Commissioners in the first quarter of 1949-50, 75 per cent graded No. 1 and No. 2 Northern compared with 72.1 per cent in the same period of 1948-49. Another indication of the generally excellent quality of the 1949 crop is the comparatively small proportion of wheat grading tough with only 2.0 per cent of all varieties falling into this classification, as against nearly 7 per cent in 1948. It is observed that these inspections include a relatively small proportion of old-crop wheat in both years.

Lake Shipments of Canadian Grain from the Opening of Navigation to November 17, 1949 and to approximately the same date, 1939 to 1948

| | Wheat | Oats | Barley | Rye | Flaxseed | Total |
|------------|-------------|------------|------------|------------|-----------|-------------|
| | - bushels - | | | | | |
| 1939 | 162,347,936 | 15,835,742 | 16,058,455 | 3,775,008 | 382,497 | 198,399,638 |
| 1940 | 149,688,516 | 13,815,719 | 9,192,213 | 2,833,786 | 1,162,096 | 176,692,330 |
| 1941 | 197,838,766 | 8,268,211 | 9,877,059 | 5,601,571 | 1,496,620 | 223,082,227 |
| 1942 | 157,317,254 | 9,082,102 | 8,362,398 | 991,137 | 2,158,334 | 177,911,225 |
| 1943 | 202,711,108 | 37,079,059 | 39,511,543 | 1,778,154 | 6,532,030 | 287,611,894 |
| 1944 | 271,337,511 | 72,572,094 | 53,003,159 | 7,339,477 | 6,165,034 | 410,417,275 |
| 1945 | 314,319,291 | 80,381,430 | 42,568,312 | 4,306,523 | 3,598,096 | 445,173,652 |
| 1946 | 120,361,851 | 51,535,757 | 26,347,867 | 2,150,554 | 1,934,680 | 202,330,709 |
| 1947 | 141,377,929 | 40,659,855 | 25,014,215 | 7,720,844 | 2,496,298 | 217,269,141 |
| 1948 | 107,649,235 | 28,967,388 | 26,741,146 | 4,923,783 | 6,906,908 | 175,188,460 |
| 1949 | 150,756,134 | 38,553,483 | 31,769,372 | 12,109,364 | 8,363,371 | 241,551,724 |

Lake shipments of Canadian grain from the opening of navigation to November 17, 1949 amounted to 241.6 million bushels, some 66.4 million more than for approximately the same period last year. The proportions of each grain in the current year's total shipments to date are: wheat 62.4 per cent; oats 16.0; barley 13.1; rye 5.0 and flax 3.5 per cent. It is anticipated that the usual seasonal rush prior to the close of navigation will result in the movement of further substantial quantities during the last few weeks of the season.

Wheat Shipments to the United States, by Destination, August 1--November 17, 1949
Compared with Approximately the Same Periods 1948 and 1947

| | 1949 | 1948 | 1947 |
|--------------------------------|-----------|-----------|-----------|
| | bu. | bu. | bu. |
| <u>By Vessel</u> | | | |
| Buffalo | 5,081,621 | 6,714,985 | 8,787,066 |
| Oswego | - | 737,500 | - |
| Erie | - | 1,575,567 | 1,155,260 |
| Total - Vessel Shipments | 5,081,621 | 9,028,052 | 9,942,326 |
| <u>By Rail</u> | | | |
| U.S.A. Seaboard Ports | - | - | - |
| Other U.S.A. Points | 17,500 | - | 49,058 |
| Total - Rail Shipments | 17,500 | - | 49,058 |
| GRAND TOTAL | 5,099,121 | 9,028,052 | 9,991,384 |

Shipments of Canadian wheat to United States destinations in the period August 1 to November 17, 1949 amounted to 5.1 million bushels, down sharply from shipments in the comparable periods of 1948 and 1947.

Shipments of Wheat to Maritime Ports from Bay and Lake Ports

| | August 1 to November 24, 1949 | August 1 to November 25, 1948 |
|---------------------|----------------------------------|----------------------------------|
| | - bushels - | |
| Collingwood | 271,330 | 100,552 |
| Midland | 2,341,526 | 408,363 |
| Owen Sound | 441,926 | 65,440 |
| Port McNicoll | 3,071,341 | 817,537 |
| Goderich | 65,510 | 56,839 |
| Total | 6,191,633 | 1,448,731 |

Rail movements of grain to Maritime ports from ports on the Great Lakes began earlier this year than in 1948. The total amount of wheat moved by rail to November 24 this crop year was 6.2 million bushels as compared with 1.4 million for the same period in 1948. The bulk of the grain moved so far has come from the elevators at Midland and Port McNicoll where 2.3 million and 3.1 million bushels respectively have been transhipped so far this year compared with 0.4 million and 0.8 million for the comparable period in 1948. With the close of navigation in mid-December the usual seasonal increase in rail shipments of wheat to Maritime ports may be anticipated.

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 October 1949 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 | 122,482 |
| November | 256,249 | 100,563 | 138,600 | |
| December | 1,601,883 | 691,223 | 1,740,405 | |
| January | 2,462,002 | 3,149,421 | 3,794,391 | |
| February | 1,816,087 | 1,851,773 | 3,720,733 | |
| March | 1,711,013 | 3,423,684 | 1,511,072 | |
| April | 566,006 | 371,950 | 659,467 | |
| May | 361,386 | 154,551 | 884,171 | |
| June | 241,475 | 81,133 | 330,348 | |
| July | 123,145 | 231,414 | 469,797 | |
| Total | 9,758,598 | 10,368,942 | 13,376,558 | |

Distribution of Rail Shipments of Wheat from the Lakehead by Provinces and Grades, October 1949

| | Ontario | Quebec | New Brunswick | Nova Scotia |
|--------------------------------|---------|--------|---------------|-------------|
| - bushels - | | | | |
| 1 Northern | - | - | 2,000 | - |
| 2 Northern | - | - | 4,000 | - |
| Number 5 | 4,867 | 27,500 | - | 1,667 |
| Number 6 | - | 19,333 | - | - |
| Tough No. 5 | 2,569 | 1,500 | - | - |
| Tough No. 6 | - | 1,500 | - | - |
| Feed | - | 9,000 | - | - |
| Rej. 3 Nor. Mxd. Htd. | - | 1,500 | - | - |
| Rej. 4 Nor. Mxd. Htd. | 1,500 | 1,333 | - | - |
| Tf. Rej. 4 Nor. Mxd. Htd. | - | 2,068 | - | - |
| Rejected No. 5 | 433 | 11,907 | - | - |
| Rejected No. 5 Mxd. Htd. | - | 1,500 | - | - |
| 1 C.W.A.D. | 6,000 | - | - | - |
| 3 C.W.A.D. | 3,000 | 4,500 | - | - |
| Rejected 3 C.W.A.D. | - | 3,000 | - | - |
| Tough Rejected 3 C.W.A.D. | - | 1,333 | - | - |
| Sample Red Spring Htd. | - | 4,554 | - | - |
| Tough Sple. Red Spring Htd. .. | 1,563 | 4,355 | - | - |
| Total | 19,932 | 94,883 | 6,000 | 1,667 |
| Grand Total | 122,482 | | | |

Freight Assistance Shipments -

Wheat shipments to eastern Canada and British Columbia under the freight assistance plan during the first two months of the current crop year were only 62 per cent of those during the similar period in 1948-49 according to claims filed up to the end of September. All provinces receiving freight-assisted wheat shipments, except Prince Edward Island, shared in the 0.8 million bushel decrease. Ontario and Quebec received 80 per cent of the shipments during August and September of this year, compared with 69 per cent during the same months in 1948. The filing of late claims will necessitate an upward revision in the August and September 1949 shipments which will narrow somewhat the difference in shipments between the two years.

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

| | Ontario | Quebec | New Brunswick | Nova Scotia | Prince Edward Island | British Columbia | New- found- land | Total |
|---------------------------|---------|--------|------------------|----------------|----------------------------|---------------------|------------------------|-------|
| - 000 bushels - | | | | | | | | |
| August | 216 | 358 | 25 | 26 | 24 | 158 | 1 | 808 |
| September.. | 196 | 331 | 8 | 14 | 7 | 3 | 1 | 560 |
| Total ... | 412 | 689 | 33 | 40 | 31 | 161 | 2 | 1,368 |
| Same Period 1948-49 .. | 805 | 703 | 66 | 80 | 30 | 507 | - | 2,191 |

With reduced shipments to all provinces, millfeeds moving under the freight assistance plan during August and September amounted to 53,304 tons, down 53 per cent from shipments during the same period last year. Almost half of the freight-assisted millfeed claims during the period under review were filed from the province of Quebec and comparatively small amounts moved to the Maritimes and British Columbia. As with wheat shipments, the filing of late claims will increase the current year's totals over those shown in the table below.

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

| | August 1 to September 30, 1949 | August 1 to September 30, 1948 |
|----------------------------|-----------------------------------|-----------------------------------|
| - tons - | | |
| Ontario | 13,948 | 32,760 |
| Quebec | 27,748 | 52,187 |
| New Brunswick | 3,482 | 9,016 |
| Nova Scotia | 3,891 | 7,558 |
| Prince Edward Island | 1,348 | 2,193 |
| Newfoundland | 168 | - |
| British Columbia | 2,719 | 10,543 |
| Total | 53,304 | 114,257 |

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

| | Overseas Clearances of Canadian Wheat | U. S. Imports ^{1/} of Canadian Wheat for Consumption and Grinding in Bond | Customs ^{2/} Exports of Canadian Wheat Flour | Total | Customs ^{3/} 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 |
| Total | 133,372 | 133 | 61,477 | 194,982 | 199,475 |
| <u>1948-49</u> ^{4/} | | | | | |
| 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 | 23,286 | 1,899 | 3,225 | 28,410 | 24,850 |
| July | 19,552 | 816 | 3,589 | 23,957 | 23,422 |
| Total | 178,960 | 5,255 | 48,094 | 232,309 | 228,202 |
| <u>1949-50</u> ^{4/} | | | | | |
| August | 16,639 | 62 | 4,032 | 20,733 | 24,014 |
| September | 14,947 | 881 | 3,905 | 19,733 | 18,294 |
| October | 18,420 | 1,675 | 3,348 | 23,443 | 21,903 |
| Total | 50,006 | 2,618 | 11,285 | 63,909 | 64,211 |

^{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 and 1948-49 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, Dominion Bureau of Statistics.

^{4/} Subject to revision.

Exports of Canadian Wheat and Wheat Flour
August 1949 to October 1949

| | September | | October | | August—October | |
|-------------------------------------|--------------------------|-----------------|--------------------------|-----------------|--------------------------|-----------------|
| | Wheat Flour <u>1/</u> | Wheat <u>2/</u> | Wheat Flour <u>1/</u> | Wheat <u>2/</u> | Wheat Flour <u>1/</u> | Wheat <u>2/</u> |
| | - bushels - | | - bushels - | | - bushels - | |
| <u>COMMONWEALTH COUNTRIES</u> | | | | | | |
| United Kingdom | 1,540,643 | 9,688,081 | 1,253,232 | 14,291,607 | 4,725,887 | 34,505,361 |
| Eire | - | 171,733 | - | - | - | 349,066 |
| <u>Africa</u> | | | | | | |
| Br. S. Africa | 805 | - | - | - | 805 | 938,583 |
| <u>Br. West Africa</u> | | | | | | |
| Gold Coast | 28,431 | - | 14,940 | - | 59,193 | - |
| Nigeria | 918 | - | 783 | - | 1,701 | - |
| Sierra Leone | 14,701 | - | 3,325 | - | 26,572 | - |
| <u>Asia</u> | | | | | | |
| British Malaya | 176,594 | - | - | - | 205,763 | - |
| Hong Kong | 216,630 | - | 201,650 | - | 631,260 | - |
| India | - | - | - | - | 36 | - |
| <u>Europe</u> | | | | | | |
| Gibraltar | 697 | - | 17,928 | - | 18,945 | - |
| Malta | - | 296,000 | - | - | - | 296,000 |
| <u>North America</u> | | | | | | |
| Bahamas | 23,818 | - | 18,697 | - | 64,129 | - |
| Barbados | 34,884 | 833 | 50,026 | - | 125,302 | 833 |
| Jamaica | 133,101 | - | 63,094 | - | 384,093 | - |
| Trinidad-Tobago ... | 194,544 | - | 146,228 | - | 614,466 | - |
| Leeward-Windward Is. | 69,345 | - | 82,472 | - | 219,434 | - |
| Bermuda | 10,323 | - | 10,958 | - | 30,249 | - |
| British Honduras .. | 5,157 | - | 1,948 | - | 10,183 | - |
| <u>South America</u> | | | | | | |
| British Guiana | 99,446 | - | 71,154 | - | 251,060 | - |
| <u>TOTAL COMMONWEALTH COUNTRIES</u> | | | | | | |
| | 2,550,037 | 10,156,647 | 1,936,435 | 14,291,607 | 7,369,078 | 36,089,843 |

Exports of Canadian Wheat and Wheat Flour - continued

| | September | | October | | August—October | |
|----------------------|-------------------|-----------|-------------------|-----------|-------------------|-----------|
| | Wheat Flour 1/ | Wheat 2/ | Wheat Flour 1/ | Wheat 2/ | Wheat Flour 1/ | Wheat 2/ |
| | - bushels - | | - bushels - | | - bushels - | |
| FOREIGN COUNTRIES | | | | | | |
| Africa | | | | | | |
| Azores and Madeira . | 1,607 | - | 3,357 | - | 6,570 | - |
| Belgian Congo | 9,864 | - | 7,020 | - | 23,310 | - |
| Canary Islands | 1,836 | - | - | - | 2,750 | - |
| Liberia | 230 | - | 459 | - | 2,241 | - |
| Morocco | 23,130 | - | 50,270 | - | 75,164 | - |
| Portuguese Africa .. | - | - | 1,030 | - | 45,544 | - |
| Spanish Africa | - | - | - | - | 10,098 | - |
| Asia | | | | | | |
| Arabia | - | - | 2,295 | - | 44,127 | 7,349 |
| China | 22,950 | - | 5,737 | - | 28,687 | - |
| Indonesia | - | - | 1,836 | - | 10,431 | - |
| Iraq-Iran | - | 1,607,283 | - | 1,223,627 | - | 3,441,632 |
| Israel | - | 357,522 | - | 504,152 | - | 861,674 |
| Philippine Islands . | 473,229 | - | 735,538 | - | 1,552,896 | - |
| Siam | 8,604 | - | 12,303 | - | 35,136 | - |
| Turkey | - | 261,307 | - | - | - | 2,114,933 |
| Europe | | | | | | |
| Belgium | - | 75,089 | 139 | 754,506 | 17,811 | 1,970,725 |
| France | - | - | - | - | 1,377 | - |
| Germany | 5,049 | - | 4,820 | - | 17,811 | - |
| Greece | 6,827 | - | 4,257 | - | 23,310 | - |
| Italy | 7,344 | 252,261 | 2,295 | - | 13,770 | 252,261 |
| Netherlands | - | - | 1,836 | - | 2,340 | - |
| Norway | - | 772,207 | - | 380,800 | - | 1,153,007 |
| Poland | - | - | - | - | 1,062 | - |
| Portugal | 5,310 | - | - | - | 5,310 | - |
| Switzerland | 1,836 | 1,415,202 | - | 1,148,150 | 5,202 | 3,581,318 |
| Yugoslavia | 3,213 | - | 2,412 | - | 9,725 | - |
| North America | | | | | | |
| Costa Rica | 48,366 | - | 20,201 | 16,667 | 104,481 | 33,334 |
| Cuba | 241,173 | - | 101,336 | - | 440,960 | - |
| Dominican Republic . | 25,978 | - | 26,014 | - | 58,306 | - |
| El Salvador | 3,784 | - | 17,663 | - | 30,258 | - |
| Guatemala | 23,036 | - | 11,691 | - | 63,374 | - |
| Haiti | 41,306 | - | 3,429 | - | 68,135 | - |
| Honduras | 3,442 | - | - | 7,500 | 5,737 | 7,500 |
| Nether. Antilles ... | 14,346 | - | 22,892 | - | 62,136 | - |
| Nicaragua | 5,049 | - | 9,891 | - | 29,092 | - |
| Panama | 29,767 | - | 21,569 | - | 65,511 | - |
| St. Pierre-Miquelon. | - | - | 2,749 | - | 4,585 | - |

Exports of Canadian Wheat and Wheat Flour - concluded

| | September | | October | | August—October | |
|-----------------------------------------|--------------------------|-----------------|--------------------------|-----------------|--------------------------|-----------------|
| | Wheat Flour <u>1/</u> | Wheat <u>2/</u> | Wheat Flour <u>1/</u> | Wheat <u>2/</u> | Wheat Flour <u>1/</u> | Wheat <u>2/</u> |
| | - bushels - | | - bushels - | | - bushels - | |
| <u>FOREIGN COUNTRIES</u> | | | | | | |
| <u>North America</u> | | | | | | |
| United States | 13,550 | - | 16,524 | - | 45,968 | - |
| For grinding in bond <u>3/</u> | - | 874,638 | - | 1,674,811 | - | 2,599,886 |
| For domestic consumption <u>3/</u> . | - | 6,000 | - | - | - | 17,500 |
| Virgin Islands .. | 2,295 | - | - | - | 2,295 | - |
| <u>Oceania</u> | | | | | | |
| Hawaii | 459 | - | - | - | 1,377 | 433 |
| <u>South America</u> | | | | | | |
| Bolivia | - | - | - | - | 3,100 | - |
| Colombia | 7,983 | 38,266 | 6,579 | 53,747 | 15,710 | 122,213 |
| Ecuador | 38,178 | - | 14,229 | 37,333 | 93,492 | 37,333 |
| Nether. Guiana .. | 12,699 | - | 14,404 | - | 41,449 | - |
| Peru | - | 11,345 | - | - | - | 330,690 |
| Venezuela | 272,434 | - | 286,547 | 2,000 | 845,258 | 2,000 |
| TOTAL FOREIGN COUNTRIES | 1,354,874 | 5,671,120 | 1,411,322 | 5,803,293 | 3,915,896 | 16,533,788 |
| GRAND TOTAL EXPORTED | 3,904,911 | 15,827,767 | 3,347,757 | 20,094,900 | 11,284,974 | 52,623,631 |

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

Exports of Canadian Wheat and Wheat Flour
Crop Year 1948-49

| | Wheat ^{1/} | Wheat Flour ^{2/} | Total Wheat ^{1/} and Wheat Flour ^{2/} |
|-------------------------------------|---------------------|---------------------------|---------------------------------------------------------------|
| | bu. | bu. | bu. |
| <u>COMMONWEALTH COUNTRIES</u> | | | |
| United Kingdom | 128,681,049 | 23,047,268 | 151,728,317 |
| Eire | 1,707,492 | 19,580 | 1,727,072 |
| <u>Africa</u> | | | |
| British East Africa | - | 5,512 | 5,512 |
| British South Africa | 7,442,891 | 228,492 | 7,671,383 |
| <u>British West Africa</u> | | | |
| Gold Coast | - | 191,204 | 191,204 |
| Nigeria | - | 11,363 | 11,363 |
| Sierra Leone | - | 67,612 | 67,612 |
| Other British West Africa. | - | 2,065 | 2,065 |
| <u>Asia</u> | | | |
| Aden | - | 73,782 | 73,782 |
| Hong Kong | - | 1,035,567 | 1,035,567 |
| India | 11,315,099 | 2,520 | 11,317,619 |
| Pakistan | - | 459,144 | 459,144 |
| <u>Europe</u> | | | |
| Gibraltar | - | 115,313 | 115,313 |
| Malta | 2,201,133 | - | 2,201,133 |
| <u>North America</u> | | | |
| Bahamas | - | 263,295 | 263,295 |
| Barbados | 50 | 443,911 | 443,961 |
| Jamaica | 26,278 | 1,193,148 | 1,219,426 |
| St. Vincent | 6 | - | 6 |
| Trinidad-Tobago | 166 | 2,298,038 | 2,298,204 |
| Leeward-Windward Islands . | - | 767,862 | 767,862 |
| Bermuda | - | 115,744 | 115,744 |
| British Honduras | 7,500 | 36,477 | 43,977 |
| Newfoundland | 17 | 1,014,341 | 1,014,358 |
| <u>South America</u> | | | |
| British Guiana | - | 914,760 | 914,760 |
| TOTAL COMMONWEALTH COUNTRIES | 151,381,681 | 32,300,998 | 183,688,679 |

Exports of Canadian Wheat and Wheat Flour - continued

| | Wheat ^{1/} | Wheat Flour ^{2/} | Total Wheat ^{1/} and Wheat Flour ^{2/} |
|--------------------------|---------------------|---------------------------|---------------------------------------------------------------|
| | bu. | bu. | bu. |
| <u>FOREIGN COUNTRIES</u> | | | |
| <u>Africa</u> | | | |
| Azores and Madeira | - | 16,740 | 16,740 |
| Belgian Congo | - | 95,337 | 95,337 |
| Canary Island | - | 12,951 | 12,951 |
| Egypt | 2,398,021 | 210,213 | 2,608,234 |
| French Africa | - | 20,146 | 20,146 |
| Liberia | - | 9,468 | 9,468 |
| Morocco | - | 134,114 | 134,114 |
| Portuguese Africa | - | 181,940 | 181,940 |
| Spanish Africa | - | 3,672 | 3,672 |
| <u>Asia</u> | | | |
| Arabia | 445,864 | 117,869 | 563,733 |
| China | 522,666 | 350,172 | 872,838 |
| Indonesia | - | 9,738 | 9,738 |
| Iran | 343,276 | 3,568 | 346,844 |
| Israel | 912,296 | - | 912,296 |
| Japan | - | 2,821 | 2,821 |
| Lebanon | 448,408 | - | 448,408 |
| Palestine | - | 241,628 | 241,628 |
| Philippine Islands | - | 3,037,329 | 3,037,329 |
| Portuguese Asia | - | 72,081 | 72,081 |
| Siam | 92 | 52,449 | 52,541 |
| Syria | - | 2,481,912 | 2,481,912 |
| Trans-Jordan | - | 20,866 | 20,866 |
| Turkey | 2,345,067 | - | 2,345,067 |
| <u>Europe</u> | | | |
| Belgium | 4,966,932 | 349,304 | 5,316,236 |
| Denmark | - | 4,567 | 4,567 |
| Germany | 527,345 | 768,519 | 1,295,864 |
| Greece | - | 65,606 | 65,606 |
| Iceland | - | 234,207 | 234,207 |
| Italy | 3,719,246 | 2,230,074 | 5,949,320 |
| Netherlands | 361,066 | 98,428 | 459,494 |
| Norway | 957,830 | - | 957,830 |
| Portugal | 1,631,551 | 84,362 | 1,715,913 |
| Spain | - | 2,281 | 2,281 |
| Switzerland | 5,574,353 | 464,112 | 6,038,465 |
| Yugoslavia | - | 15,259 | 15,259 |
| <u>North America</u> | | | |
| Costa Rica | 16,667 | 250,911 | 267,578 |
| Cuba | 3,000 | 599,832 | 602,832 |
| Dominican Republic | 6,008 | 176,472 | 182,480 |
| El Salvador | 15,000 | 48,406 | 63,406 |
| French W. Indies | - | 1,444 | 1,444 |

Exports of Canadian Wheat and Wheat Flour - Concluded

| | Wheat ^{1/} | Wheat Flour ^{2/} | Total Wheat ^{1/} and Wheat Flour |
|-------------------------------------------------------|---------------------|---------------------------|-------------------------------------------------|
| | bu. | bu. | bu. |
| <u>FOREIGN COUNTRIES</u> | | | |
| <u>North America</u> | | | |
| Guatemala | - | 120,303 | 120,303 |
| Haiti | - | 227,079 | 227,079 |
| Honduras | 35,833 | 11,475 | 47,308 |
| Mexico | 1,033,870 | - | 1,033,870 |
| Netherlands Antilles | - | 140,342 | 140,342 |
| Nicaragua | - | 27,216 | 27,216 |
| Panama | - | 117,918 | 117,918 |
| Puerto Rico | 20,500 | - | 20,500 |
| St. Pierre-Miquelon | - | 20,515 | 20,515 |
| <u>United States</u> | - | 285,642 | 285,642 |
| For grinding in bond ^{3/} | 3,839,462 | - | 3,839,462 |
| For domestic consumption ^{3/} | 1,390,955 | - | 1,390,955 |
| Unfit for domestic consumption ^{3/} | 24,754 | - | 24,754 |
| Alaska | 267 | 2,637 | 2,904 |
| Virgin Islands | - | 207 | 207 |
| <u>Oceania</u> | | | |
| French Oceania | - | 9 | 9 |
| Guam | - | 4,545 | 4,545 |
| Hawaii | - | 9,950 | 9,950 |
| <u>South America</u> | | | |
| Bolivia | - | 7,623 | 7,623 |
| Brazil | - | 284,269 | 284,269 |
| Columbia | 64,615 | 15,228 | 79,843 |
| Ecuador | 48,533 | 162,153 | 210,686 |
| French Guiana | - | 8,388 | 8,388 |
| Netherlands Guiana | - | 107,991 | 107,991 |
| Peru | 1,199,653 | 49 | 1,199,702 |
| Venezuela | 500 | 1,764,689 | 1,765,189 |
| TOTAL FOREIGN COUNTRIES | 32,853,650 | 15,787,026 | 48,640,656 |
| GRAND TOTAL EXPORTED | 184,235,311 | 48,094,024 | 232,329,335 |

^{1/} Subject to revision, overseas clearances compiled by Board of Grain Commissioners.

^{2/} Canadian Customs returns (conversion rate 4 1/2 wheat bushels equal 1 barrel)
revised to remove effect of time lag in the returns made by Customs.

^{3/} Source:- United States Department of Commerce, Bureau of the Census.

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

| | | Weeks ending - | | | |
|--------------------------------------------------------------|-------|----------------------------------|-----------|-----------|-----------|
| | | August 6 | August 13 | August 20 | August 27 |
| (A) CANADIAN WHEAT BOARD CASH PRICES | | - cents and eighths per bushel - | | | |
| <u>WHEAT</u> | | | | | |
| (1) Initial Payment to Producers Compulsory Pool 1949-50 | | | | | |
| 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) Class I (Domestic Sales) ^{1/} | | | | | |
| 1 Hard | 205 | 205 | 205 | 205 | 205 |
| 1 Northern | 205 | 205 | 205 | 205 | 205 |
| 2 Northern | 202 | 202 | 202 | 202 | 202 |
| 3 Northern | 200 | 200 | 200 | 200 | 200 |
| 4 Northern | 197 | 197 | 197 | 197 | 197 |
| Number 5 | 186/4 | 185 | 185 | 185 | 185 |
| Number 6 | 182/4 | 181 | 181 | 181 | 181 |
| Feed | 180/4 | 179 | 179 | 179 | 179 |
| 1 C.W. Garnet | 200 | 200 | 200 | 200 | 200 |
| 2 C.W. Garnet | 198 | 198 | 198 | 198 | 198 |
| 3 C.W. Garnet | 196 | 196 | 196 | 196 | 196 |
| 1 Alberta Red Winter | 205 | 205 | 205 | 205 | 205 |
| 2 Alberta Winter | 204 | 204 | 204 | 204 | 204 |
| 3 Alberta Winter | 201 | 201 | 201 | 201 | 201 |
| 1 C.W. Amber Durum | 205 | 205 | 205 | 205 | 205 |
| 2 C.W. Amber Durum | 202 | 202 | 202 | 202 | 202 |
| 3 C.W. Amber Durum | 200 | 200 | 200 | 200 | 200 |
| (3) Class II (Export Sales) | | | | | |
| (A) United Kingdom Contract ^{2/} | | | | | |
| 1 Hard | 205 | 205 | 205 | 205 | 205 |
| 1 Northern | 205 | 205 | 205 | 205 | 205 |
| 2 Northern | 202 | 202 | 202 | 202 | 202 |
| 3 Northern | 200 | 200 | 200 | 200 | 200 |
| (B) To International Wheat Agreement Countries ^{3/} | | | | | |
| 1 Northern | 180 | 180 | 180 | 180 | 180 |
| 2 Northern | 177 | 177 | 177 | 177 | 177 |
| 3 Northern | 175 | 175 | 175 | 175 | 175 |
| (C) To All Other Countries | | | | | |
| 1 Hard | 207/5 | 207/3 | 205/7 | 205 | 205 |
| 1 Northern | 207/5 | 207/3 | 205/7 | 205 | 205 |
| 2 Northern | 204/5 | 204/3 | 202/7 | 202 | 202 |
| 3 Northern | 202/5 | 202/3 | 200/7 | 200 | 200 |
| 1 C.W. Amber Durum | 207/5 | 207/3 | 205/7 | 205 | 205 |
| 2 C.W. Amber Durum | 204/5 | 204/3 | 202/7 | 202 | 202 |
| 3 C.W. Amber Durum | 202/5 | 202/3 | 200/7 | 200 | 200 |

Weekly Average Prices of Canadian Wheat

| | | Weeks ending - | | | |
|-----------------------------------------------------------------|-------|----------------------------------|----------|----------|----------|
| | | Sept. 3 | Sept. 10 | Sept. 17 | Sept. 24 |
| (A) CANADIAN WHEAT BOARD CASH PRICES | | - cents and eighths per bushel - | | | |
| <u>WHEAT</u> | | | | | |
| (1) Initial Payment to Producers Compulsory Pool 1949-50 | | | | | |
| 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) Class I (Domestic Sales) <u>1/</u> | | | | | |
| 1 Hard | 205 | 205 | 205 | 205 | 205 |
| 1 Northern | 205 | 205 | 205 | 205 | 205 |
| 2 Northern | 202 | 202 | 202 | 202 | 202 |
| 3 Northern | 200 | 200 | 200 | 200 | 200 |
| 4 Northern | 197 | 197 | 197 | 197 | 197 |
| Number 5 | 185 | 185 | 185 | 185 | 185 |
| Number 6 | 181 | 181 | 181 | 181 | 181 |
| Feed | 179 | 179 | 179 | 179 | 179 |
| 1 C.W. Garnet | 200 | 200 | 200 | 200 | 200 |
| 2 C.W. Garnet | 198 | 198 | 198 | 198 | 198 |
| 3 C.W. Garnet | 196 | 196 | 196 | 196 | 196 |
| 1 Alta. Red Winter | 205 | 205 | 205 | 205 | 205 |
| 2 Alberta Winter | 204 | 204 | 204 | 204 | 204 |
| 3 Alberta Winter | 201 | 201 | 201 | 201 | 201 |
| 1 C.W. Amber Durum | 205 | 205 | 205 | 205 | 205 |
| 2 C.W. Amber Durum | 202 | 202 | 202 | 202 | 202 |
| 3 C.W. Amber Durum | 200 | 200 | 200 | 200 | 200 |
| (3) Class II (Export Sales) | | | | | |
| (A) <u>United Kingdom Contract</u> <u>2/</u> | | | | | |
| 1 Hard | 205 | 205 | 205 | 205 | 205 |
| 1 Northern | 205 | 205 | 205 | 205 | 205 |
| 2 Northern | 202 | 202 | 202 | 202 | 202 |
| 3 Northern | 200 | 200 | 200 | 200 | 200 |
| (B) <u>To International Wheat Agreement Countries</u> <u>3/</u> | | | | | |
| 1 Northern | 180 | 180 | 180 | 195 | |
| 2 Northern | 177 | 177 | 177 | 192 | |
| 3 Northern | 175 | 175 | 175 | 190 | |
| (C) <u>To All Other Countries</u> | | | | | |
| 1 Hard | 207/5 | 210/5 | 211/7 | 230/4 | |
| 1 Northern | 207/5 | 210/5 | 211/7 | 230/4 | |
| 2 Northern | 204/5 | 207/5 | 208/7 | 227/4 | |
| 3 Northern | 202/5 | 205/5 | 206/7 | 225/4 | |
| 1 C.W. Amber Durum | 207/5 | 210/5 | 211/7 | 230/4 | |
| 2 C.W. Amber Durum | 204/5 | 207/5 | 208/7 | 227/4 | |
| 3 C.W. Amber Durum | 202/5 | 205/5 | 206/7 | 225/4 | |

Weekly Average Prices of Canadian Wheat

| | | Weeks ending - | | | |
|-----------------------------------------------------------------|-------|----------------------------------|--------|---------|---------|
| | | Oct. 1 | Nov. 5 | Nov. 12 | Nov. 19 |
| (A) CANADIAN WHEAT BOARD CASH PRICES | | - cents and eighths per bushel - | | | |
| <u>WHEAT</u> | | | | | |
| <u>(1) Initial Payment to Producers Compulsory Pool 1949-50</u> | | | | | |
| 1 Hard | 175 | 175 | 175 | 175 | |
| 1 Northern | 175 | 175 | 175 | 175 | |
| 2 Northern | 172 | 172 | 172 | 172 | |
| 3 Northern | 170 | 170 | 170 | 170 | |
| 4 Northern | 165 | 165 | 165 | 165 | |
| Number 5 | 155 | 155 | 155 | 155 | |
| Number 6 | 151 | 151 | 151 | 151 | |
| Feed | 149 | 149 | 149 | 149 | |
| <u>(2) Class I (Domestic Sales) 1/</u> | | | | | |
| 1 Hard | 205/1 | 206 | 206 | 206 | |
| 1 Northern | 205/1 | 206 | 206 | 206 | |
| 2 Northern | 202/1 | 203 | 203 | 203 | |
| 3 Northern | 200/1 | 201 | 201 | 201 | |
| 4 Northern | 197/1 | 198 | 198 | 198 | |
| Number 5 | 185/1 | 186 | 186 | 186 | |
| Number 6 | 181/1 | 182 | 182 | 182 | |
| Feed | 179/1 | 180 | 180 | 180 | |
| 1 C.W. Garnet | 200/1 | 201 | 201 | 201 | |
| 2 C.W. Garnet | 198/1 | 199 | 199 | 199 | |
| 3 C.W. Garnet | 196/1 | 197 | 197 | 197 | |
| 1 Alberta Red Winter | 205/1 | 206 | 206 | 206 | |
| 2 Alberta Winter | 204/1 | 205 | 205 | 205 | |
| 3 Alberta Winter | 201/1 | 202 | 202 | 202 | |
| 1 C.W. Amber Durum | 205/1 | 206 | 206 | 206 | |
| 2 C.W. Amber Durum | 202/1 | 203 | 203 | 203 | |
| 3 C.W. Amber Durum | 200/1 | 201 | 201 | 201 | |
| <u>(3) Class II (Export Sales)</u> | | | | | |
| <u>(A) United Kingdom Contract 2/</u> | | | | | |
| 1 Hard | 205/1 | 206 | 206 | 206 | |
| 1 Northern | 205/1 | 206 | 206 | 206 | |
| 2 Northern | 202/1 | 203 | 203 | 203 | |
| 3 Northern | 200/1 | 201 | 201 | 201 | |
| <u>(B) To International Wheat Agreement Countries 3/</u> | | | | | |
| 1 Northern | 198 | 198 | 198 | 198 | |
| 2 Northern | 195 | 195 | 195 | 195 | |
| 3 Northern | 193 | 193 | 193 | 193 | |
| <u>(C) To All Other Countries</u> | | | | | |
| 1 Hard | 239/5 | 236/1 | 236 | 236 | |
| 1 Northern | 239/5 | 236/1 | 236 | 236 | |
| 2 Northern | 236/5 | 233/1 | 233 | 233 | |
| 3 Northern | 234/5 | 231/1 | 231 | 231 | |
| 1 C.W. Amber Durum | 239/5 | 236/1 | 236 | 236 | |
| 2 C.W. Amber Durum | 236/5 | 233/1 | 233 | 233 | |
| 3 C.W. Amber Durum | 234/5 | 231/1 | 231 | 231 | |

1/ Covers sales for seed and feed or to mills and includes 5 cents per bushel carrying charges August 1 to September 30 inclusive, 6 cents per bushel carrying charge October 1, 1949. Sales prices to distillers at the discretion of of the Board.

2/ Includes 5 cents per bushel carrying charge August 1 to September 30, inclusive, 6 cents per bushel carrying charge October 1, 1949.

3/ Plus 5 cents per bushel carrying charge.

THE CANADIAN FLOUR MILLING SITUATION

Production of flour by Canadian mills for the month of October at 1,858,774 barrels was practically unchanged from the September level. Mills reporting operations for the month had a total rated capacity of 97,810 barrels per 24-hour day and, on the basis of a 25-day working period in the month, 76.0 per cent of the rated capacity was effective. During the first three months of the current crop year production of flour totalled 5,465,928 barrels, a decrease of 288,344 barrels from the output of the first quarter of 1948-49.

Exports of flour have also declined from 1948-49 levels. For the period August-October 1949, exports amounted to 2,507,772 barrels, compared with 3,205,272 barrels during the same period in 1948.

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 | 896,068 |
| September | 1,857,154 | 867,758 |
| October | 1,858,774 | 743,946 |
| Total | 5,465,928 | 2,507,772 |
| <hr/> | | |
| Same Period 1948-49 | 5,754,272 | 3,205,272 |

^{1/} Based on Customs returns. Exports for 1945-46 to 1948-49, inclusive, 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 -

Based on the October estimate of production, total domestic supplies of United States wheat for the 1949-50 crop year are 1,432 million bushels, a decrease of 52 million bushels from the 1948-49 level. Exports of wheat during the first quarter of the present crop year amounted to 82 million bushels, down 25 million bushels from the comparable period of 1948-49. Flour exports at 11 million bushels of wheat equivalent, were less than one quarter of those for the July-September period last year. The quantity of wheat milled, at 137 million bushels, was also well below the comparable total registered for the same period in 1948. Supplies of wheat remaining for milling, export or carry-over on October 1, 1949 totalled 990 million bushels, about 2 million bushels more than on the same date a year ago.

The following table sets up the statistical position of wheat in the United States according to the United States Department of Agriculture.

United States Wheat Supply and Distribution 1949-50 Season With Comparisons

| | 1943-47 Average | 1948-49 | 1949-50 Preliminary |
|----------------------------------------------------------------------------------------------------------------------|--------------------|---------|------------------------|
| - million bushels - | | | |
| Carry-over stocks, July 1 | 279.7 | 196.0 | 305.8 |
| New Crop | 1,106.5 | 1,288.4 | 1,126.2 ^{1/} |
| Total Domestic Supplies | 1,386.2 | 1,484.4 | 1,432.0 |
| Estimated quantity for feed, seed and industrial use for season ^{2/} | 390.7 | 220.4 | 223.0 |
| Quantity remaining for milling, export, or carry-over | 995.5 | 1,264.0 | 1,209.0 |
| Disappearance July 1 through September 30: | | | |
| Wheat milled for flour | 154.5 | 168.4 | 137.0 |
| Exports of wheat as grain | 41.1 | 107.4 | 81.9 |
| Total Exported or Milled | 195.6 | 275.8 | 218.9 |
| Balance on October 1 for milling, export or carry-over | 799.9 | 988.2 | 990.1 |
| Exports of flour, including macaroni in grain equivalent, July-September (Not included in grain exports) | 26.9 | 47.4 | 11.4 |

^{1/} October estimate.

^{2/} Includes an estimate for breakfast food, which is not included in the quantity of wheat milled for flour.

September 1949 flour milling calculated from trade sources and September 1949 exports calculated from boat loadings, P.M.A. purchases, etc.

Flour Production -

The United States Bureau of the Census estimated on November 21 the September output of wheat at 20.4 million sacks. This was about 2 per cent above the August output of 20.0 million sacks, the first time since 1943 that September production was above that for August. Despite the September rise, production was 14 per cent less than the 23.6 million sacks produced in September last year. Flour mills operated at an average of 70.2 per cent of capacity during the month.

July-October Grain Exports -

In a report released on November 25, 1949 the United States Department of Agriculture estimated July-October exports of grain and grain products at approximately 4,971,000 long tons (198,151,000 bushels of grain equivalent), as compared with 6,175,000 long tons (237,366,000 bushels of grain equivalent) in the same period of 1948.

July-October exports of wheat and wheat products were substantially smaller, and total exports of other grains and grain products (including corn, oats, grain sorghums, barley, rye, corn grits and meal, corn starch and flour, oatmeal and malt) were substantially larger, than in the same months of last year.

The following table shows the estimates for the two periods:

| 1948 | | | | | 1949 | | | |
|------------------------------|---------|-----------|---------|--------|------------------------------|----------------------|-------------------|----------------------|
| Wheat, Flour and Macaroni | | Other | | | Wheat, Flour and Macaroni | | Other | |
| Long Tons | Bushels | Long Tons | Bushels | | Long Tons | Bushels | Long Tons | Bushels |
| - thousands - | | | | | - thousands - | | | |
| July | 1,323 | 49,388 | 207 | 9,363 | 829 | 30,949 | 479 | 20,933 |
| Aug. | 1,674 | 62,490 | 213 | 9,186 | 825 | 30,800 | 514 | 24,645 |
| Sept. | 1,279 | 47,745 | 107 | 5,307 | 893 | 33,338 | 369 | 16,127 |
| Oct. | 1,138 | 42,481 | 234 | 11,406 | 771 ^{1/} | 28,784 ^{1/} | 291 ^{1/} | 12,575 ^{1/} |
| Total | 5,414 | 202,104 | 761 | 35,262 | 3,318 | 123,871 | 1,653 | 74,280 |

^{1/} October 1949 figures are preliminary.

The bulk of the July-October exports went to the U.S.-U.K. zone of Germany and the U.S.-Pacific areas—amounting to 2,964,000 tons, or 60 per cent of total grain exports during the period. About 1,164,000 tons, or 23 per cent of all grains and grain products, went to the following ECA countries: Austria, Belgium, Denmark, France and French North Africa, the French Zone of Germany,

Greece, Ireland, Italy, Luxembourg, Netherlands, Norway, Portugal, Trieste, and the United Kingdom. During the same period about 855,000 tons, or 17 per cent were shipped to India, the Philippines, Spain, Latin American countries, and other countries. Principal recipients among the Latin American countries were Cuba and Mexico.

International Wheat Agreement Sales -

The United States Department of Agriculture announced on November 25 sales (some of which were still to be officially recorded by the International Wheat Council) of 3,766,357 bushels of wheat, (including wheat and wheat flour in wheat equivalent) under the International Wheat Agreement. The sales included 223,408 hundredweight of commercial flour (517,145 bushels of wheat equivalent), 1,412,027 bushels of commercial wheat, and 1,837,185 bushels of CCC wheat. Principal buyers were Mexico, Austria, Portugal and Norway. The following table shows by countries of destination the cumulative sales since the beginning of the program August 1 through November 24, 1949:

| Country | Commercial Flour | | Commercial Wheat | CCC Wheat | TOTAL |
|----------------------------------|------------------|-----------|------------------|------------|------------|
| | cwt. | bu. | bu. | bu. | bu. |
| Austria | - | - | - | 1,837,185 | 1,837,185 |
| Belgium & Belgian Colonies | 6,010 | 13,912 | - | 3,453,333 | 3,467,245 |
| Bolivia | 51,481 | 119,168 | - | - | 119,168 |
| Cuba | 150,151 | 347,570 | 10,173 | - | 357,743 |
| Dominican Republic . | 6,544 | 15,148 | - | - | 15,148 |
| Ecuador | 107,158 | 248,049 | - | - | 248,049 |
| El Salvador | 40,445 | 93,622 | 13,334 | - | 106,956 |
| Guatemala | 85,318 | 197,494 | - | - | 197,494 |
| Ireland | - | - | - | 933,334 | 933,334 |
| Israel | 165,345 | 382,741 | - | 373,333 | 756,074 |
| Mexico | - | - | 2,954,107 | - | 2,954,107 |
| Netherlands | 476,051 | 1,101,963 | - | 3,196,702 | 4,298,663 |
| Nicaragua | 6,951 | 16,090 | - | - | 16,090 |
| Norway | 482,482 | 1,116,849 | 149,333 | - | 1,266,188 |
| Panama | 7,476 | 17,305 | - | - | 17,305 |
| Peru | - | 1,168,444 | - | - | 1,168,444 |
| Portugal | 121,155 | 280,450 | 336,000 | 2,426,666 | 3,043,116 |
| Saudi Arabia | 47,702 | 110,421 | - | 37,333 | 147,754 |
| United Kingdom | 245,321 | 567,869 | - | - | 567,869 |
| Venezuela | 173,887 | 402,514 | - | - | 402,514 |
| TOTAL | 2,173,477 | 5,031,165 | 4,631,391 | 12,257,886 | 21,920,442 |

Chicago and Minneapolis Cash Wheat -

Chicago cash wheat continued weak in the face of a threat of delivery on December futures of eastern red wheat and a modest amount of yellow hard wheat now in store at Chicago and eastern points. The government return of the export business to the private trade early in November coupled with a reluctance of foreign buyers and mills to enter the market for any appreciable trade, held gains down to a few cents.

Minneapolis cash wheat remained firm with but modest changes in price occurring. Scanty country offerings and an improvement in the domestic flour trade linked to heavy government impoundings and buying under the C.C.C. have created strength in the Minneapolis market.

Daily Cash Wheat Prices on the Chicago and Minneapolis Markets

| 1949 | Chicago | | Minneapolis | |
|----------|-----------------|------------------|-----------------|-------------------|
| | Grade | Price | Grade | Price |
| October | 24 2 Red | 208 1/2 | 1 Dark Northern | 220 1/4 - 223 1/4 |
| | 25 None | | 1 Dark Northern | 220 1/8 - 223 1/8 |
| | 26 None | | 1 Dark Northern | 219 7/8 - 222 7/8 |
| | 27 3 Red | 205 1/4 | 1 Dark Northern | 218 5/8 - 221 5/8 |
| | 28 3 Red | 207 | 1 Dark Northern | 217 3/8 - 220 3/8 |
| | 29 None | | 1 Dark Northern | 217 7/8 - 219 7/8 |
| | 31 3 Red | 205 3/4 | 1 Dark Northern | 217 1/8 - 219 1/8 |
| November | 1 None | | 1 Dark Northern | 217 5/8 - 218 5/8 |
| | 2 2 Hard | 207 1/2 | 1 Dark Northern | 219 - 220 |
| | 3 4 Red Tough | 192 | 1 Dark Northern | 219 1/2 - 220 1/2 |
| | 4 2 Yellow Hard | 209 | 1 Dark Northern | 220 1/4 - 221 1/4 |
| | 5 4 Red Tough | 192 | 1 Dark Northern | 220 1/4 - 221 1/4 |
| | 7 1 Red | 206 3/4 | 1 Dark Northern | 217 3/4 - 218 3/4 |
| | 8 3 Red | 202 | 1 Dark Northern | 220 - 221 |
| | 9 None | | 1 Dark Northern | 220 1/4 - 221 1/4 |
| | 10 None | | 1 Dark Northern | 220 5/8 - 221 5/8 |
| | 11 | Remembrance Day | | |
| | 12 None | | 1 Dark Northern | 220 7/8 - 221 7/8 |
| | 14 None | | 1 Dark Northern | 220 1/4 - 221 1/4 |
| | 15 2 Mixed | 205 | 1 Dark Northern | 220 1/8 - 221 1/8 |
| | 16 2 Mixed | 203 1/2 | 1 Dark Northern | 220 - 221 |
| | 17 3 Red Tough | 194 | 1 Dark Northern | 220 5/8 - 221 5/8 |
| | 18 3 Red | 203 1/2 | 1 Dark Northern | 222 1/2 - 223 1/2 |
| | 19 None | | 1 Dark Northern | 222 7/8 - 223 7/8 |
| | 21 4 Red | 197 | 1 Dark Northern | 223 - 224 |
| | 22 3 Red | 207 | 1 Dark Northern | 222 7/8 - 223 7/8 |
| | 23 3 Red | 208 1/2 | 1 Dark Northern | 221 1/2 - 222 1/2 |
| | 24 | Thanksgiving Day | | |
| | 25 2 Red | 213 | 1 Dark Northern | 222 3/8 - 223 3/8 |
| | 26 3 Red | 212 3/4 | 1 Dark Northern | 222 3/4 - 223 3/4 |
| | 28 4 Red | 212 | 1 Dark Northern | 223 7/8 - 224 7/8 |
| | 29 3 Red | 214 1/2 | 1 Dark Northern | 224 3/4 - 226 3/4 |
| | 30 None | | 1 Dark Northern | 224 3/8 - 225 3/8 |

Chicago Wheat Futures - Prices of December wheat futures on the Chicago grain market fell from \$2.13/3 on October 27 to \$2.09/4 on November 16. The possibility of substantial deliveries on December contracts coupled with poor export demand for wheat and flour, as well as lack of buying interest from the government agency largely accounted for the drop. On November 17 December wheat futures were selling at four-eighths under May contracts, an indication of the weak market conditions. Some strength was gained by the futures market during the period November 18 to November 30 with a slight pick-up in foreign demand and some interest in wheat for domestic consumption shown by millers.

Chicago Wheat Futures, High Points of Closing

| 1949 | December | March | May | July | |
|----------------------------------|----------|-------|--------------|-------|-------|
| - cents and eighths per bushel - | | | | | |
| October | 27 | 213/3 | 214/5 | 209/6 | 194/2 |
| | 28 | 213/4 | 214/4 | 209/5 | 194/1 |
| | 29 | 214/3 | 215/6 | 210/4 | 194/7 |
| | 31 | 212/3 | 214/4 | 210 | 194/7 |
| November | 1 | 212/6 | 215 | 211/4 | 196/4 |
| | 2 | 212/4 | 214/1 | 211/4 | 196/3 |
| | 3 | 212 | 213/7 | 211 | 195/5 |
| | 4 | 213/1 | 215 | 211/6 | 195 |
| | 5 | 212/4 | 214/1 | 211/1 | 194/2 |
| | 7 | 210/2 | 212/2 | 209/6 | 193/6 |
| | 8 | 211/4 | 214 | 211/4 | 194/7 |
| | 9 | 211/7 | 214/3 | 211/6 | 194/7 |
| | 10 | 211/3 | 214/2 | 211/5 | 194/4 |
| | 11 | | Remembrance | Day | |
| | 12 | 211/7 | 214/6 | 211/7 | 194/4 |
| | 14 | 211 | 214 | 211/3 | 193/6 |
| | 15 | 209/5 | 212/4 | 210/2 | 192/3 |
| | 16 | 209/4 | 212 | 209/7 | 191/7 |
| | 17 | 209/7 | 212/6 | 210/3 | 192/2 |
| | 18 | 211/4 | 213/6 | 211/3 | 193/3 |
| | 19 | 211/6 | 214 | 211/4 | 193/6 |
| | 21 | 213/6 | 215/3 | 212/5 | 193/3 |
| | 22 | 215 | 216/1 | 213/3 | 194 |
| | 23 | 214/1 | 215/4 | 211/6 | 193/6 |
| | 24 | | Thanksgiving | Day | |
| | 25 | 216 | 217 | 212/5 | 194/1 |
| | 26 | 216/6 | 218/2 | 213/5 | 194/5 |
| | 28 | 217 | 218/1 | 213/5 | 194/6 |
| | 29 | 219 | 219/1 | 214/2 | 196/1 |
| | 30 | 218/4 | 218/4 | 213/5 | 196/5 |

THE ARGENTINE WHEAT SITUATION

The following review of the grain situation in the Argentine has been extracted from a report forwarded November 18, 1949 by Mr. W. B. McCullough, Commercial Secretary (Agriculture) at Buenos Aires and is reproduced herewith by kind permission of the Trade Commissioner Service.

Note: Where possible conversions to Canadian measures have been made for the convenience of Canadian readers. (pesos converted to dollars at the nominal quotation by the Bank of Canada, November 26, 1949, at 1 peso equals \$.3275).

Weather and Crops -

Spring was late in Argentina this year and the weather remained relatively cool up to early November. Generally, temperatures were low with occasional frosts in parts of the grain zones. In mid-October frost caused slight damage to wheat in the provinces of Santa Fe and Cordoba and a frost on October 28th inflicted considerable loss to wheat in the west of the Province of Buenos Aires, which area was already suffering from drought.

During October there were several good rains throughout the principal grain zones, and soil moisture is considered satisfactory in all but the west of the Province of Buenos Aires and the Territory of La Pampa. There were general rains on November 15th and the drought, which was considered the most severe since 1937, was broken in this western area. Here, it has been necessary to reduce live-stock numbers to the minimum as the pastures were extremely short, and farmers have petitioned the government for assistance in procuring feeding stuffs and seed for next year. Further heavy rains are necessary in this area to counteract the prolonged drought.

In mid-October there were hail storms in the provinces of Santa Fe, Cordoba and Buenos Aires but only light damage was reported. In some areas in the northern grain zone heavy rainfall flooded certain districts. Attacks from the green fly have lessened with greater moisture; but there are reports of localized attacks of rust.

The danger period for frost damage to the Argentine wheat crop has now passed. Prospects for yields in the Provinces of Santa Fe and Cordoba and in the southern grain zone along the coast of Buenos Aires Province, are from good to excellent. They are also good in the Province of Entre Rios despite the damage caused by wet weather at seeding time. Only in the west of the Province of Buenos Aires and the Territory of La Pampa, where drought and, later, frost caused damage, are the prospects from fair to poor.

The most reliable trade estimates place this year's wheat acreage at 13.6 million acres or about the same as last year. However, on approximately the same acreage, Argentina is expected to have an above-average yield and the harvest will be above last year's unofficial figure of 4.5 million short tons.

So far, the government has not announced the price at which IAPI will acquire the 1949-50 grain crops, but it is expected that there will be little change from the \$2.05 per bushel paid for the last wheat crop. With Argentina's price for wheat at \$2.41 per bushel now on a level with that quoted by other exporting countries, a local press report quotes the "Wall Street Journal" as saying: "Argentina is under new pressure to join the International Wheat Pact as an additional source of supply.....Britain is sounding out Argentina on the possibility of joining the agreement. It would provide an additional dollar free source of supplies. It was understood that Argentina will send an answer to the wheat council meeting scheduled for December 15." Argentina has, to date,

chosen to remain outside the scope of the pact, having found it more remunerative to sell wheat at higher prices on a government to government basis, but with the revised exchange rates and price modifications, Argentina is in a better position to participate.

Shipments - Argentine clearances of wheat and corn during October show an improvement over previous months, the figure for wheat being the highest since July and that for corn the highest since last January. Comparative figures are as follows, according to trade information:

| | Wheat | | Corn | |
|-----------------|----------------------|-------|-------|--------|
| | 1949 | 1948 | 1949 | 1948 |
| | - thousand bushels - | | | |
| July | 4,505 | 2,478 | 1,999 | 8,082 |
| August | 3,601 | 3,237 | 3,123 | 6,763 |
| September | 4,210 | 2,530 | 2,508 | 4,981 |
| October | 4,334 | 3,221 | 4,441 | 10,757 |

Argentine grain exports, by destination, according to trade sources, for the first ten months of 1949 are as follows:

| | Wheat | Corn | Oats | Barley | Wheat Flour |
|---------------------|----------------------|--------|-------|--------|-------------------|
| | - thousand bushels - | | | | 196-pound barrels |
| United Kingdom | - | 4,584 | - | - | - |
| France | 385 | 2,873 | - | 919 | - |
| Belgium | 82 | 9,259 | 1,817 | 1,300 | - |
| Italy | 18,372 | 3,022 | 475 | - | 1,856 |
| Netherlands | - | 5,285 | 97 | 1,773 | - |
| Norway | - | - | 337 | - | - |
| Sweden | - | 2,312 | 754 | 267 | - |
| Spain | 11,290 | 427 | 130 | 7 | 675 |
| Switzerland | - | 356 | 1,779 | 5 | 338 |
| Rest of Europe | - | 486 | 2,074 | 2,212 | - |
| Brazil | 19,482 | - | - | 32 | - |
| Other S.A. reps. .. | 2,111 | 120 | 690 | - | - |
| Others | 5,145 | 3,263 | - | 2,002 | 21,382 |
| 10 months 1949 | 56,867 | 31,987 | 8,153 | 8,517 | 24,251 |
| 10 months 1948 | 71,034 | 78,091 | 5,041 | 28,184 | 64,170 |
| 10 months 1947 | 68,808 | 52,670 | 3,795 | 17,256 | 105,000 |

SOUTH AFRICAN SITUATION

Crop estimates gathered in October 1949 place the South African wheat crop for 1949-50, to be harvested between November and February, at 15 million bushels. The total crop is expected to be 2.5 million bushels less than the final estimate for last season. Normal wheat requirements for the Union are between 27 and 30 million bushels per year. Wheat imports from abroad during 1950 may reach between 12 and 15 million bushels.

THE AUSTRALIAN WHEAT SITUATION

Bountiful Wheat Harvest in Australia - Australia expects her third successive "bumper" wheat crop this season with an estimated yield of between 186,000,000 and 189,000,000 bushels, compared with 190,703,000 bushels for the 1948-49 season and the all-time record crop of 228,380,000 bushels for the 1947-48 harvest. (Editor's note: The Commonwealth Statistician places preliminary wheat estimate at 195 million bushels).

New South Wales will reap the largest crop. The harvest in that State is estimated at 70,000,000 bushels from 4,350,000 acres sown for grain, an average of 18.3 bushels an acre compared with 16 bushels last season.

A member of the Australian Wheat Board has stated that from this season's crop, Australia should be able to market 176,000,000 bushels worth about \$275,968,000 at ports and mills. The demand for Australian wheat has become very active recently probably because of the entry of Japan and Germany into world markets. Neither country is party to the international wheat agreement and each has therefore to buy in the "free" market.

As one of the five exporting nations which ratified the international wheat agreement in March, 1949, Australia is committed to supply 80,000,000 bushels of wheat each year for four years to buyers from among the 36 purchasing nations who signed the agreement. The ruling price for these sales in November, 1949, was 16/4d Australian currency, (\$1.98 Canadian currency) f.o.b. Surplus wheat can be sold on the "free" market.

Recently the Australian Wheat Board has had enquiries for "free" wheat from Rhodesia, Peru, Japan, Israel, Holland, Chili and Ceylon and has made some sales at more than 20/- Australian currency (\$2.42 Canadian currency) a bushel f.o.b. ports on a bulk basis.

CALENDAR OF WHEAT EVENTS

- November 2 The wheat export monopoly exercised by the United States Commodity Credit Corporation during the past seven years ended as of October 31, 1949. The free enterprise grain trade will be permitted to export wheat to all parts of the world except Austria, China, Greece, Trieste, Korea and the occupation zones of Japan and Germany. This action of the CCC has been expected for some time. Private trading will also be permitted in flaxseed and soy beans.
- 5 The S.S. Hochelaga of the Canada Steamship Lines is the newest and largest Great Lakes freighter. The vessel can carry 580,000 bushels of wheat. The last loading of the Hochelaga was 521,000 bushels of wheat from Fort William to Port Colborne.
- 10 The latest official crop report from the Netherlands for 1949 shows an increase both in yields and total production of grain although the areas sown were greater than in 1948 only for corn and bread grain. The total production increased from 277,000 short tons to 383,000 short tons. The yield per hectare this year is 36 per cent greater than during the

CALENDAR OF WHEAT EVENTS

prewar decades. Summer wheat plantings and production were below the 1948 levels. The area sown to rye was increased by only 3 per cent, but total production increased by 105,000 tons to 452,000 tons. The oat crop is estimated at 372,000 tons, 86,000 tons greater than in 1948. Corn was extensively sown for the first time (about 12 thousand acres) and brought a total production of 10,500 tons.

November 15 The Australian Minister of Agriculture has announced that a contract has been signed for the construction of the New South Wales Wheat Research Institute at Wagga Agricultural College. The Institute will undertake research in all phases of wheat growing and will also examine the baking qualities of wheat produced in Australia.

23 Britain's 1949 cereal crops are reported to have produced the highest yields in recent years, as shown in the following table:

| | 1949 (Estimated) | 1948 | Average last ten years |
|--------------|----------------------|------|---------------------------|
| | - bushels per acre - | | |
| Wheat | 44.8 | 39.2 | 37.3 |
| Barley | 44.0 | 42.0 | 38.0 |
| Oats | 60.3 | 57.4 | 51.6 |

23 The Canadian Wheat Board announced that effective November 23, 1949 and until July 31st, 1950, producers may deliver wheat, oats and barley at any elevator at any delivery point where space is available, regardless of the delivery point specified in the permit book. The quota governing such deliveries shall be the quota in effect at the point where the grain is delivered.

29 The Belgian Ministry of Agriculture has declared its intention of supporting the wheat crop of 1950. In collaboration with the Ministry of Economic Affairs the compulsory percentage of home grown wheat used in the manufacture of bread will be maintained at a level to be determined by the amount grown. The price will not be fixed beforehand, but it would appear that it will be approximately the same as for the 1948 crop, i.e., 430 B.fr. per 100 kg. (\$2.58 Canadian per bushel). However, this may be varied seasonally depending on supply and demand. At the moment although the fixed price is 420 B.fr. (\$2.52 Canadian per bushel) the actual sales price is much lower, closer to 400 (\$2.40 Canadian per bushel) as supplies are very heavy and farmers are unloading on the market.

30 The amount of United States wheat from the 1949 crop placed under loan or purchase agreement is expected to equal or exceed the 364 million bushels from the 1948 crop. Through October 31, 281 1/2 million bushels were being held under these programs. Wheat prices which were below the loan rate early in the season, are now generally above the loan level. Exports under the International Wheat Agreement are expected to increase as a result of a new program which provides for CCC export subsidy payments for wheat and wheat products financed under ECA. Through November 24, United States sales under the agreement totaled 22 million bushels. The United States annual quota under the agreement is 168 million bushels.

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