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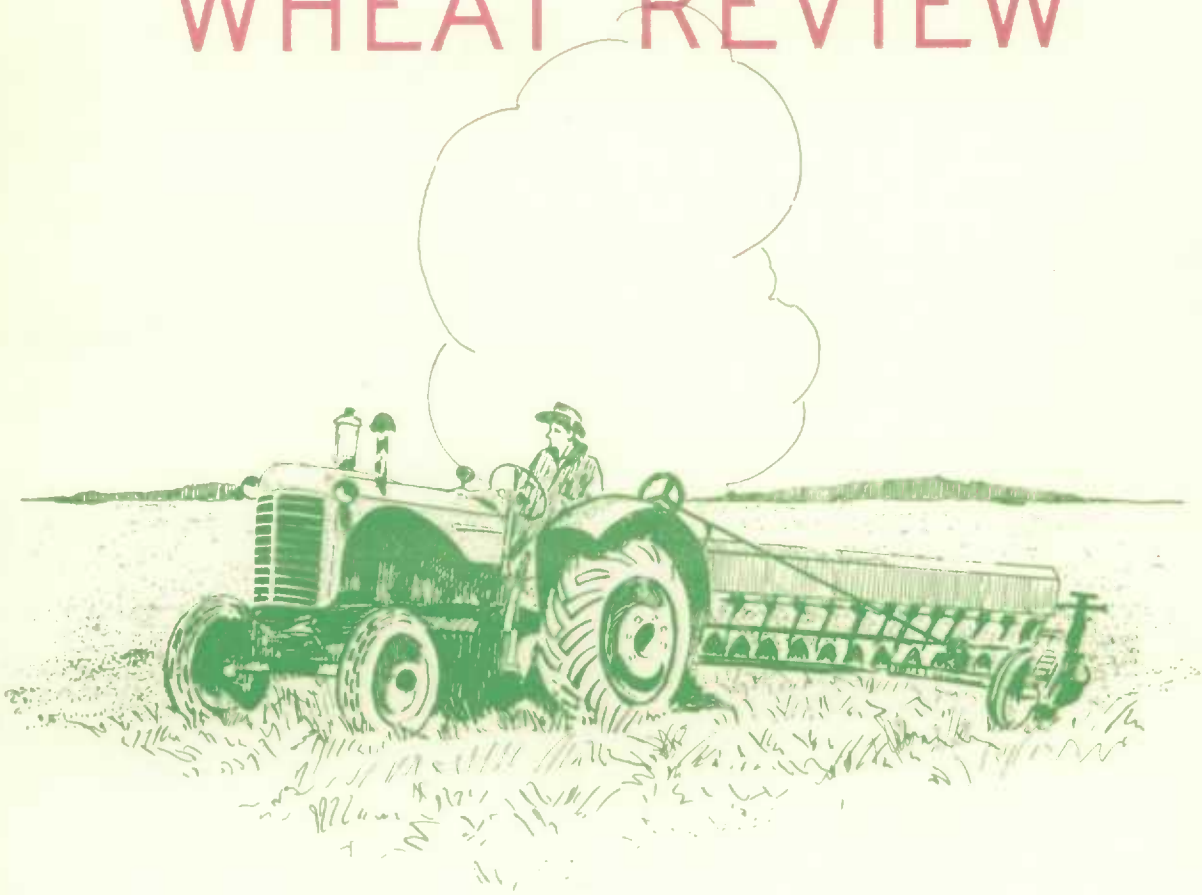
THE WHEAT REVIEW



MAY, 1952

DOMINION BUREAU OF STATISTICS
Department of Trade and Commerce

THE WHEAT REVIEW

MAY, 1952

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WORLD WHEAT SITUATION

Current Supplies Latest available estimates indicate that supplies of wheat remaining on or about May 1, 1952 in the four major exporting countries for export and carryover at the end of their respective crop years amounted to 746.4 million bushels, 18 per cent below the 909.7 million available a year ago. Supplies this year (in millions of bushels) were held as follows, with last year's figures in brackets: Canada, 377.6 (275.8); United States, 298.9 (481.2); Australia, 66.3 (93.8); and Argentina, 3.6 (58.9). Estimates for both years include on-farm stocks as well as those in commercial positions. Spring harvesting operations have now been practically completed in all areas of Western Canada where wheat remained in the fields over winter. The successful recovery of a large proportion of this wheat in good condition largely removes the element of uncertainty that necessarily attended earlier estimates of the Canadian supply position.

New Crop Prospects While it is still too early in the season for an over-all appraisal of current world wheat crop prospects, several factors affecting the potential size of the 1952 crop are already evident. In general, there has been a tendency, accompanied in many countries by varying degrees of government support, to increase wheat acreage. This is particularly true in Argentina and Australia where farmers are being encouraged, in the case of the former country by sharply increased guaranteed prices, to raise production to its former levels. Seeding is now under way in both countries under generally favourable conditions, but it will be some time before the extent of the anticipated acreage increases will be known.

In North America, the stage of development of the 1952 wheat crop varies from the recent completion of seeding of spring wheat in Western Canada to harvesting of winter wheat in the southern United States. Based on conditions at May 1, the United States winter wheat crop was estimated at 986 million bushels, 53 per cent larger than the 645 million bushels harvested in 1951 and about one-quarter larger than the ten-year average of 800 million. A winter wheat crop of the size indicated would be exceeded only by the crops of 1947 and 1948. This year's acreage for harvest is placed at 51.1 million acres, compared with 39.8 million in 1951 and the ten-year average of 45.2 million. In Ontario, where most of Canada's winter wheat is grown, acreage is estimated at 640,000 acres as against last year's 703,000 acres. Winterkilling during the winter of 1951-52 was estimated at 8 per cent, and condition at May 1 was considered about average for that time of year.

Forecasts of the North American spring wheat crop are not yet available. Prospective plantings of all spring wheat in the United States, based on farmers' intentions at March 1, were placed at 22.0 million acres, 1.2 per cent lower than last year's 22.3 million. Intended acreage for spring wheat in Canada, according to farmers' plans at the end of April, was estimated at 25.0 million acres, 1.8 per cent higher than last year's 24.6 million acres. The realization of these intended acreages would result in a slight net increase in the area seeded to spring wheat this year in Canada and the United States. Any change in spring wheat production in these areas, therefore, will be largely dependent on conditions affecting yield.

Pre-seasonal moisture supplies were generally above average in the United States and Canada, with the exception of southeastern Saskatchewan and southern Manitoba. The prolonged warm dry weather this spring in Western Canada, however, depleted surface moisture in many areas and caused uneven

germination in late-seeded fields. While showers broke the dry spell over much of Western Canada during the last week of May, general rains are now needed to maintain current prospects which are very favourable over the greater part of the Prairies.

Crop prospects throughout Western Europe continue to be generally favourable although rains and warmer weather are needed in some countries to promote growth. In the United Kingdom, where wheat acreage is expected to be slightly below last year's 2,060,000 acres, the general crop outlook remains favourable. Trade reports indicate that crop prospects are excellent in France and above average in Spain and Portugal. In Western Germany, however, very little moisture has been received during the past few weeks and it now appears probable that the outturn will fall below last year's despite the fact that crops obtained a good start. Italy's wheat crop, forecast at 257.6 million bushels, is slightly higher than last year but warm, dry weather is now needed to maintain the current favourable outlook. Little information is available on crop prospects in Eastern Europe but trade reports indicate an increase of 17 per cent in the acreage seeded to spring wheat in the Ukraine.

Eighth Session of International Wheat Council

The eighth session of the International Wheat Council, which opened in London on April 17 to consider an extension of the International Wheat Agreement, adjourned on May 9. On May 12 the Chairman of the Council issued the following statement summarizing the Council's proceedings:

"The council has carried out a review of the provisions of the agreement and has decided that certain changes in the agreement would be desirable.

On the major question of price, the council concluded that fuller examination was required of some of the factors affecting the maximum, and minimum prices to be incorporated in an extended agreement. The council wished to examine further, among other things, whether at stated intervals there should be an automatic variation of maximum and minimum prices based on some index which would reflect changes in the general price level.

The council decided to set up a continuing committee to investigate this question of flexibility and other matters which require to be further explored before the council can reach conclusions upon them. This committee will report to the next regular bi-annual session of the council which will begin on the 1st July next.

Under a provision of the present agreement, the council is under obligation to communicate to the exporting and importing countries, not later than the 31st July, 1952, its recommendations regarding the extension of the agreement beyond the 31st July, 1953, when the present agreement expires. It will therefore be for the council during its regular session in July to make recommendations on this subject. These are expected to be of an interim character and the council's detailed recommendations on amendments to the agreement, including those on maximum and minimum prices, will be for decision when the council resumes its eighth session late in 1952."

International Wheat Agreement Sales and Purchases for Crop Year 1951-52

Importing Countries	Guaranteed Quantities	Source				Total Purchases	Remainder
		Canada 1/	Australia 2/	France 2/	U.S.A. 2/		
		- thousand bushels -					
Austria	11,023	264	-	496	9,804	10,564	459
Belgium	20,209	11,219	-	-	8,779	19,998	211
Bolivia 3/	2,756	2,050	-	-	782	2,832	-
Brazil 3/	13,228	2,461	-	-	10,671	13,132	-
Ceylon 3/.....	6,614	-	5,166	-	1,404	6,570	-
Costa Rica 3/	1,213	777	-	-	435	1,212	-
Cuba 3/	7,422	3,414	-	-	4,016	7,430	-
Denmark 3/	1,617	538	-	-	1,100	1,638	-
Dominican Republic 3/ ..	876	475	-	-	325	800	-
Ecuador 3/	1,286	174	-	-	1,156	1,330	-
Egypt	14,697	1,519	477	-	8,045	10,041	4,656
El Salvador 4/	404	66	-	-	234	300	104
Germany	66,139	11,027	2,904	3,590	48,190	65,711	428
Greece	15,726	30	-	-	14,194	14,224	1,502
Guatemala 3/	919	239	-	-	684	923	-
Haiti 3/	1,029	419	-	-	684	1,103	-
Honduras Republic 3/ ..	367	170	-	-	197	367	-
Iceland	404	101	-	-	254	355	49
India	55,116	16,651	10,014	-	28,376	55,041	75
Indonesia 3/	3,674	29	1,946	-	1,825	3,800	-
Ireland 3/	10,104	7,022	1,950	-	1,145	10,117	-
Israel 3/	5,879	1,536	-	-	4,351	5,887	-
Italy	40,418	13,649	3,879	-	18,237	35,765	4,653
Japan	18,372	3,730	-	-	13,601	17,331	1,041
Lebanon 3/	2,388	8	-	-	2,457	2,465	-
Liberia 3/	37	25	-	-	11	36	-
Mexico 5/	12,860	-	-	-	12,860	12,860	-
Netherlands 3/	24,802	6,800	2,856	-	15,279	24,935	-
New Zealand	4,593	-	4,567	-	-	4,567	26
Nicaragua 3/	331	195	-	-	127	322	-
Norway 3/	7,716	2,987	-	-	4,729	7,716	-
Panama 3/	625	303	-	-	321	624	-
Peru 3/	5,512	3,167	-	-	2,464	5,631	-
Philippines	7,202	3,491	3	-	3,002	6,496	706
Portugal 5/	5,626	945	144	-	4,508	5,597	-
Saudi Arabia 3/	1,837	-	52	-	1,796	1,848	-
Spain	4,373	1,102	-	-	1,102	2,204	2,169
Sweden 3/	2,756	-	1,493	-	1,315	2,808	-
Switzerland 3/	6,430	4,323	-	-	2,107	6,430	-
Union of South Africa ..	11,023	5,600	-	-	4,293	9,893	1,130
United Kingdom	177,068	124,565	35,395	-	16,641	176,601	467
Venezuela 6/	6,246	2,785	-	-	1,494	4,279	1,967
Totals	580,917	233,856	70,846	4,086	252,995	561,783	
Guaranteed Quantities (Exporting Countries) ..		238,490	72,000	4,089	255,149	569,728	
Balance		4,634	1,154	3	2,154	7,945	

1/ Canadian sales through May 20th, 1952.

2/ Sales recorded by International Wheat Council through May 16th, 1952.

3/ Quota filled.

4/ Sales may be resumed May 26th, 1952.

5/ Quota filled May 20th, 1952.

6/ Quota not officially open for remainder pending clarification of Import Licences to be issued.

CANADIAN SITUATION

Canadian Delegation at Meeting of International Wheat Council

The Right Hon. C.D. Howe, speaking in the House of Commons on May 26, with reference to the statement (see page 2) issued by the Chairman of the International Wheat Council at the conclusion of its eighth session in London, commented as follows on the position taken by the Canadian delegation at the meetings:

"...The Canadian delegation went to London prepared to negotiate a renewal of the agreement. For that purpose, the government appointed five advisers from the principal producer organizations in the Prairie Provinces to be available for consultations on the spot.

With the unanimous agreement of all the advisers, the Canadian delegation took the position that a substantial increase in prices was justified in a renewed agreement and made proposals along that line. The United States and Australia, the two other principal exporters, also put forward proposals for a substantially higher range of prices.

It soon appeared that there was a wide gap between the respective views of the exporting countries, on the one hand, and those of the importing countries, on the other hand, as to the level of the price range for a renewed agreement. This disparity in views was not altogether surprising considering that a renewed agreement would not come into effect until August, 1953, some fifteen months hence.

At the meeting just concluded, no country indicated that it was not prepared to continue the agreement. It was agreed, as the official statement indicates, that full-scale negotiations should be resumed at a later date, towards the end of the present calendar year, when all parties will have a clearer impression of the conditions which will prevail at the time that a renewed agreement would come into operation.

May I say in conclusion that the government is particularly grateful for the assistance given by the advisers from the farm organizations who, I am glad to say, gave complete support at all time to the views and proposals put forward by the Canadian delegation at the conference."

Supply Position

As a result of a prolonged period of unusually warm, dry weather, spring harvesting operations have now been practically completed in most areas of Western Canada. Availability of this additional supply of spring-harvested grain has been reflected in sharp increases in farmers' marketings during recent weeks. In the four-week period ending May 15, 1952 total primary marketings amounted to 54.3 million bushels, considerably above normal for this time of year. Marketings of 19.8 million bushels of wheat in the week ending May 1 constitute a record for spring deliveries and compare favourably with those in the fall months. Total marketings from the beginning of the current crop year to May 15 were 351.5 million bushels, compared with 289.0 million for the corresponding period in 1950-51.

The greatly accelerated movement of wheat from farms to commercial positions in recent weeks has again raised visible supplies above the 200 million bushel level. Supplies of Canadian wheat in all commercial positions on May 15, 1952 amounted to 216.2 million bushels, compared with 171.4 million and 117.5 million,

respectively, on approximately the same date in the preceding two years. Some 99.1 million bushels, representing about 46 per cent of current visible supplies, were still in country elevators. Lakehead stocks, at 23.6 million bushels, were slightly above last year's level of 22.8 million while stocks in Eastern Canadian positions and in United States ports were well above those of both 1951 and 1950.

Canadian Wheat Supplies

Item	1951-52 1/	1950-51
	- million bushels -	
Carryover in North America at July 31	189.2	112.2
New crop	562.4	461.7
Imports of wheat, August 1—March 31	2/	2/
Total estimated supplies	751.6	573.9
Less estimated domestic requirements for crop year	150.0	143.7
Available for export and carryover	601.6	430.2
Deduct:		
Overseas clearances of wheat as grain August 1—April 30	162.2	100.6
Exports of Canadian wheat to U.S., August 1—April 30	27.6	13.5
Total exports of wheat	189.8	114.1
Exports of wheat flour in terms of wheat, August 1—April 30	34.2 3/	40.3 3/
Total exports of wheat and wheat flour	224.0	154.4
Balance on May 1 for export and carryover	377.6	275.8

1/ Preliminary. 2/ Less than 50,000 bushels.
3/ Adjusted for time lag in returns made by Customs.

Exports of wheat as grain during April 1952 amounted to 20.0 million bushels, 2.9 million more than in the preceding month and more than half as large again as the April 1951 total of 12.7 million bushels. Total exports of wheat as grain for the first nine months of the current crop year, at 189.8 million bushels, were 66 per cent above the 114.1 million exported during the August—April period of 1950-51. This year's nine-month total already exceeds total exports of wheat as grain in each of the preceding five crop years.

Some 62.5 million bushels, representing almost one-third of this year's August—April exports of wheat, went to the United Kingdom. Other major markets for Canadian wheat during the period, with quantities in millions of bushels, were as follows: the United States, 27.6 (of which 4.3 million were for milling in bond); Japan, 12.7; Belgium, 12.2; and India 9.3.

Preliminary Customs returns indicate that exports of wheat flour in terms of wheat during April amounted to 5.4 million bushels, the highest monthly total for the current crop year. Comparable figures for March 1952 and April 1951 were 5.1 million and 5.8 million bushels, respectively. Total exports of wheat flour, in wheat equivalent, for the August—April period of the current crop year, at 34.2 million bushels, were about 15 per cent lower than the 40.3 million bushels exported during the first nine months of 1950-51. Combined exports of wheat and wheat flour in terms of wheat during the August 1—April 30 period of 1951-52 amounted to 224.0 million bushels, an increase of 69.6 million over the comparable period of 1950-51.

The balance remaining on May 1, 1952 for export and carryover was estimated at 377.6 million bushels, 101.8 million more than on the same date last year.

Adjustment of I.W.A. Quotas On May 1 the International Wheat Council announced that Australia's quota under the I.W.A. for the current crop year had been reduced from 88.7 million to 72.0 million bushels. This action confirmed earlier indications that Australian wheat supplies would be insufficient to meet current I.W.A. commitments as a result of the smaller wheat crop harvested in 1951. Of the reduction of 16.7 million bushels, 5.5 million were allotted to Canada, raising its 1951-52 quota from 233.0 million to 238.5 million bushels. The remaining export quota of 11.2 million bushels was not assigned although there were indications that the United States might take part of it if current favourable prospects for its winter wheat crop are maintained. Canada's original export quota of 233.0 million bushels has already been exceeded and, as of May 20, only 4.6 million remained of the revised quota of 238.5 million bushels.

Crop Conditions The following account of crop conditions in Ontario and the Prairie Provinces has been taken from the May 28 telegraphic crop report issued by the Dominion Bureau of Statistics:

"Moisture supplies throughout Ontario are now generally adequate as a result of heavy rains during the past two weeks. The outlook for hay and pasture crops is excellent and most cattle are now on pasture. While development of spring grain crops has been slow due to cool weather, the present outlook in most of the province is considered quite favourable. In the eastern part of the province, however, too much moisture has drowned out low-lying seeded areas and has brought field work to a standstill. Planting of corn and other late crops is progressing favourably in the southwestern part of the province. In Northern Ontario seeding is well under way but growth has been slow. Warmer weather is now the main requirement throughout the province to promote rapid growth of all crops.

Seeding is nearing completion in practically all parts of the Prairie Provinces. Dry surface moisture conditions which had developed in many areas, particularly in southern Manitoba and southeastern Saskatchewan, have been partially relieved by precipitation varying from scattered showers to fairly general rains. With subsoil moisture supplies still adequate in nearly all districts the general outlook remains quite favourable. However, crops in southern Manitoba have already deteriorated as a result of drought and good rains are required here to promote recovery. Crops in most other areas are making rapid progress. Wild oat growth is unusually heavy this year. Scattered cutworm and wireworm infestations are also reported. With relatively few exceptions spring harvesting operations have now been completed."

Area Intended for Spring Wheat Estimated at 25 Million Acres

Canadian farmers' plans for the 1952 crop season, based on their intentions at April 30, show relatively small changes from the 1951 acreages of the major grain crops, potatoes and summerfallow. Indicated increases for spring wheat, barley and potatoes are almost exactly offset by reductions in acreages seeded to winter wheat and fall rye in the fall of 1951 together with anticipated decreases in the area to be seeded this spring to oats, spring rye and flaxseed.

The area intended for spring wheat in 1952 is estimated at 25.0 million acres, an increase of about 2 per cent over last year's 24.6 million acres. This year's intended spring wheat acreage, together with the estimated 640,000 acres seeded to winter wheat in Ontario last fall, gives a total indicated area of 25.6 million acres for all wheat. For provinces other than Ontario, annual estimates of the relatively small acreages of winter wheat are not available and such acreages have been included in the figures for spring wheat.

Intended wheat seedings in the Prairie Provinces are placed at 24.8 million acres, up 1.8 per cent over the 1951 area. Saskatchewan's prospective wheat acreage, at 16.1 million acres, is up by 3 per cent while Alberta's, at 6.4 million, is unchanged and Manitoba's, at 2.3 million, is down by one per cent from last year. Indicated changes in spring wheat acreage in the other provinces, where less than one per cent of the total is located, are relatively small.

Intended Acreages of Spring Wheat in Canada, as at April 30, 1952
Compared with Acreages in 1951

Province	Acreage Seeded in 1951 1/ 2/	Acreage Intended to be Seeded in 1952		
		% of 1951	Area 1952 1/	Indicated Change
	acres		acres	acres
Prince Edward Island	4,700	98	4,600	- 100
Nova Scotia	1,200	100	1,200	-
New Brunswick	3,400	103	3,500	+ 100
Quebec	12,200	95	11,600	- 600
Ontario	43,900	96	42,100	- 1,800
Manitoba	2,326,000	99	2,303,000	- 23,000
Saskatchewan	15,635,000	103	16,104,000	+ 469,000
Alberta	6,424,000	100	6,424,000	-
British Columbia ...	101,000	101	102,000	+ 1,000
Totals.....	24,551,400	101.8	24,996,000	+ 444,600

1/ For provinces other than Ontario includes relatively small acreages of winter wheat for which annual estimates are not available.

2/ Provincial acreages have been rounded from the 1951 Census of Agriculture and replace earlier estimates for 1951 as published by the Agriculture Division, Dominion Bureau of Statistics.

Farmers' Marketings of Wheat in the Prairie Provinces, 1951-52

Week ending		Manitoba	Saskatchewan	Alberta	Total	Last Year
			- bushels -			
August	9	59,493	620,562	1,338,831	2,018,886	942,807
	16	93,082	524,729	211,439	829,250	187,897
	23	112,590	497,186	242,210	851,986	884,628
	30	403,058	679,813	235,332	1,318,203	3,004,682
September	6	477,903	209,692	118,184	805,779	17,079,804
	13	850,575	2,122,084	1,267,183	4,239,842	20,915,650
	20	2,286,507	8,117,947	3,442,011	13,846,465	18,718,298
	27	3,990,641	12,437,527	3,671,494	20,099,662	36,817,488
October	4	1,140,960	4,811,683	1,580,259	7,532,902	20,857,886
	11	3,642,881	8,909,082	4,002,911	16,554,874	9,913,670
	18	6,829,154	25,964,251	10,890,756	43,684,161	15,342,219
	25	2,889,123	16,901,420	7,418,838	27,209,381	9,282,832
November	1	1,764,548	8,346,796	3,662,096	13,773,440	11,425,054
	8	1,233,784	5,432,322	2,799,173	9,465,279	13,106,208
	15	1,059,468	4,113,854	2,472,007	7,645,329	11,805,491
	22	752,098	4,567,360	2,705,307	8,024,765	10,841,810
	29	675,980	4,545,904	2,946,092	8,167,976	8,453,757
December	6	552,962	5,371,868	4,418,351	10,343,181	7,320,744
	13	707,055	5,969,556	3,927,366	10,603,977	6,620,807
	20	648,927	4,237,451	2,064,504	6,950,882	8,563,235
	27	620,366	4,148,578	1,636,761	6,405,705	6,437,088
January	3	228,260	3,841,896	1,263,521	5,333,677	4,560,268
	10	981,598	5,300,345	2,190,317	8,472,260	3,878,629
	17	716,958	4,321,164	2,327,375	7,365,497	5,662,980
	24	299,222	2,068,288	870,199	3,237,709	3,013,360
	31	200,888	1,811,128	983,209	2,995,225	1,363,719
February	7	343,978	3,503,572	2,361,619	6,209,169	1,295,513
	14	192,499	3,435,437	1,599,885	5,227,821	1,491,550
	21	569,279	3,083,216	1,894,428	5,546,923	1,942,935
	28	340,702	2,780,067	1,352,687	4,473,456	2,330,563
March	6	301,234	3,753,527	1,931,959	5,986,720	1,340,074
	13	349,398	3,796,031	1,689,609	5,835,038	469,727
	20	386,576	2,984,427	1,312,502	4,683,505	676,453
	27	437,901	2,529,542	1,495,072	4,462,515	784,050
April	3	473,193	2,430,048	665,418	3,568,659	1,280,610
	10	368,863	745,829	294,179	1,408,871	1,470,348
	17	332,151	1,183,477	475,914	1,991,542	2,334,731
	24	521,172	5,936,946	3,362,652	9,820,770	2,255,561
May	1	764,771	11,883,831	7,116,011	19,764,613	2,548,298
	8	691,543	8,536,073	5,291,700	14,519,316	5,127,209
	15	484,652	5,251,486	4,483,875	10,220,013	6,677,334
Totals		39,775,993	207,705,995	104,013,236	351,495,224	289,025,967

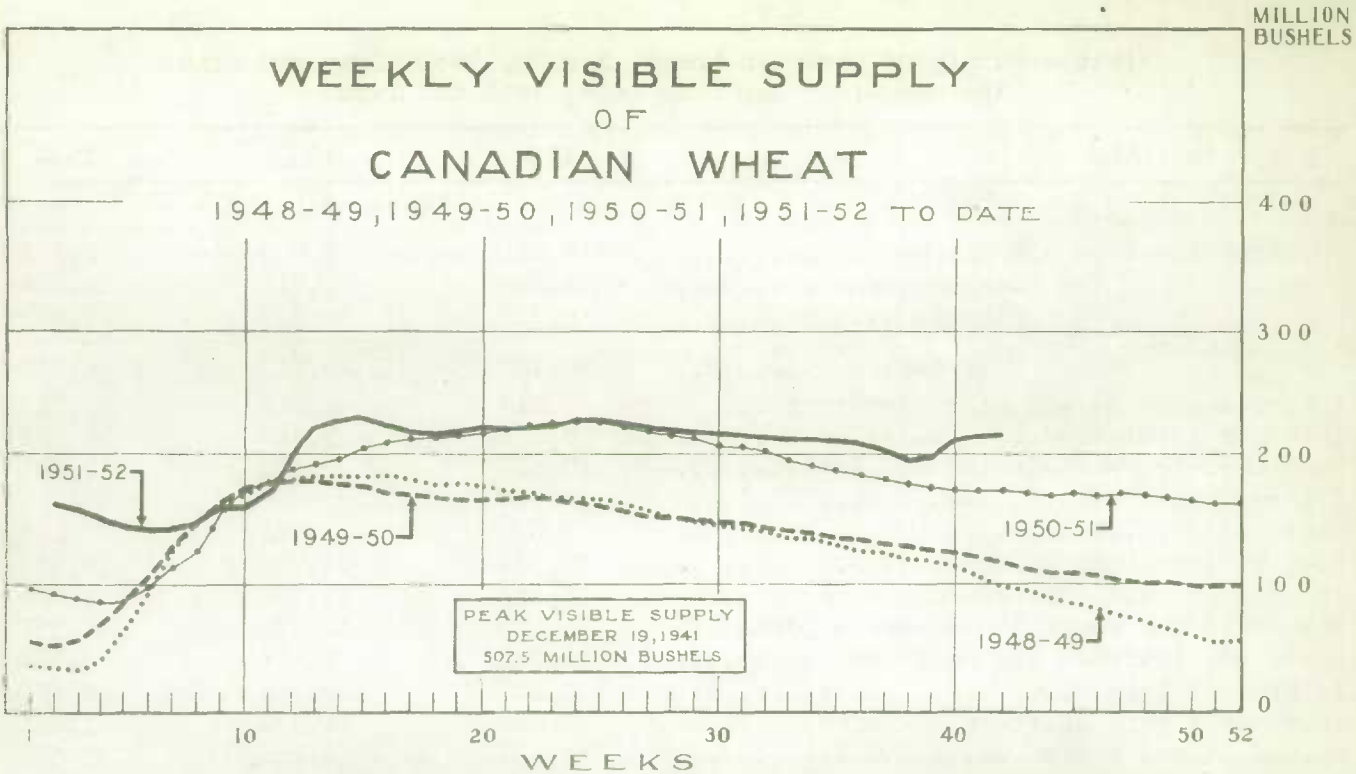
Visible Supply of Canadian Wheat, May 15, 1952, Compared with Approximately the Same Date, 1951 and 1950

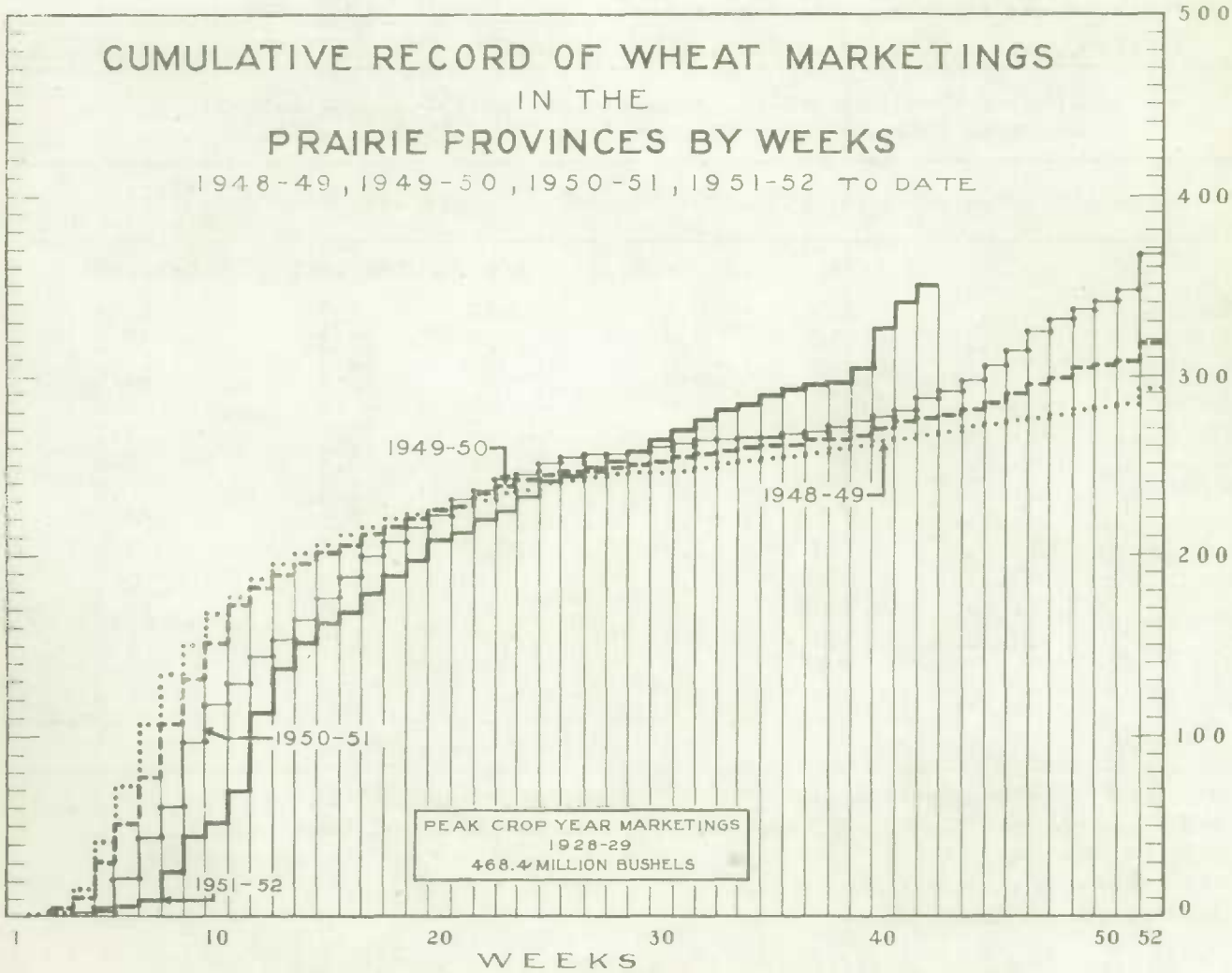
Position	1952	1951	1950
	- thousand bushels -		
Country elevators - Manitoba	6,044	7,055	2,145
Saskatchewan	56,848	54,716	14,356
Alberta	36,215	26,742	17,829
Totals	99,107	88,513	34,330
Interior private and mill elevators	5,217	4,241	3,713
Interior terminals	8,172	9,748	61
Vancouver-New Westminster	10,527	4,611	12,885
Prince Rupert	67	-	-
Churchilll.....	2,020	461	126
Fort William-Port Arthur	23,589	22,788	39,237
In transit rail (Western Division)	15,163	13,136	7,266
Bay, Lake and Upper St. Lawrence ports ...	22,523	12,452	6,352
Lower St. Lawrence and Maritime ports	12,748	8,486	5,356
In transit lake	4,201	2,702	6,670
In transit rail (Eastern Division)	2,466	1,372	1,016
United States ports	10,431	2,661	519
In transit U.S.A.	-	266	-
Totals	216,230	171,437	117,532

Grading of Wheat Inspected, August—April, 1951-52 and 1950-51 Compared with Averages for the Crop Years 1946-47—1950-51

Grade	1951-52		1950-51		Average 1946-47—1950-51
	cars	per cent	cars	per cent	per cent
1 Northern	862	0.5	5,682	4.7	14.8
2 Northern	8,674	4.8	20,770	17.3	37.6
3 Northern	26,550	14.8	19,399	16.2	13.0
4 Northern	15,057	8.4	13,444	11.2	4.4
5 Wheat	11,594	6.5	12,067	10.1	3.7
6 Wheat	8,689	4.8	7,994	6.7	2.2
Feed Wheat	1,225	0.7	1,910	1.6	0.4
Garnet	515	0.3	1,380	1.1	0.9
Amber Durum	2,383	1.3	3,243	2.7	3.5
Alberta Winter	289	0.2	550	0.5	0.7
Toughs 1/ 2/.....	69,938	39.0	24,685	20.6	15.6
Damps 1/ 3/	32,350	18.0	7,937	6.6	1.3
Dried 5 Wheat	6	4/	-	-	-
All Others	1,138	0.6	989	0.8	1.9
Totals	179,270	100.0	120,050	100.0	100.0

1/ All varieties and grades.
2/ Moisture content 14.9 to 17 per cent for durum, 14.6 to 17 per cent for all other varieties.
3/ Moisture content over 17 per cent.
4/ Less than .05 per cent.





(Data in both charts for crop years begining August 1)

Tough and Damp Grain Dried at Terminal Elevators, Western Division
August 1, 1951—May 15, 1952

Grain		Lakehead	Pacific Coast	Interior Points	Churchill	Total
		- thousand bushels -				
Wheat 1/	Tough	4,870	18,977	2,089	-	25,935
	Damp	19,910	2,149	6,511	16	28,586
Durum Wheat	Tough	1,534	-	-	-	1,534
	Damp	1,472	-	2	-	1,474
Oats	Tough	1,302	58	1	-	1,362
	Damp	7,997	2	12	-	8,011
Barley	Tough	5,076	545	1	-	5,622
	Damp	8,288	62	15	-	8,365
Rye	Tough	1,114	-	-	-	1,114
	Damp	292	-	4	-	296
Flaxseed	Tough	2,224	-	-	-	2,224
	Damp	206	-	4	-	209
Totals	Tough	16,120	19,580	2,091	-	37,791
	Damp	38,164	2,213	6,547	16	46,940

1/ Other than durum.

Lake Shipments of Canadian Grain

Total shipments of the five major grains from Lakehead terminals from the opening of navigation to May 15 amounted to 80.7 million bushels, the largest of any comparable period since 1945. Wheat shipments, at 50.5 million bushels, accounted for almost 63 per cent of this year's total while shipments of barley and oats, at 14.0 million and 12.9 million bushels, respectively, made up most of the remainder. Shipments of rye and flaxseed, at 1.9 million and 1.4 million bushels, respectively, while not historically large, were well above the totals for the comparable periods of the preceding two years.

Lake Shipments of Canadian Grain from the Opening of Navigation to May 15, 1952 and to Approximately the Same Date, 1942 to 1951

Year	Wheat	Oats	Barley	Rye	Flaxseed	Totals
	- thousand bushels -					
1942	53,834	769	822	492	61	55,978
1943	24,712	6,130	5,190	989	564	37,584
1944	57,580	15,187	9,659	2,815	3,053	88,293
1945	52,987	20,079	10,939	1,603	1,017	86,624
1946	24,167	15,411	6,590	518	219	46,905
1947	18,840	7,787	3,627	841	-	31,094
1948	18,470	3,214	2,983	231	960	25,859
1949	42,997	3,653	4,117	3,540	2,670	56,978
1950	21,847	2,155	4,024	662	69	28,757
1951	32,253	10,147	6,068	1,362	136	49,966
1952	50,532	12,876	13,986	1,882	1,392	80,668

Wheat Shipments* to the United States by Destination
August 1, 1951 to May 15, 1952
Compared with Approximately the Same Period, 1950-51 and 1949-50

Destination	1951-1952	1950-1951	1949-1950
		- bushels -	
By Vessel			
Duluth-Superior	4,361,258	1,814,968	-
Milwaukee	353,016	140,673	-
Chicago	1,161,571	375,080	192,766
Detroit	-	346,050	-
Toledo	-	108,485	-
Erie	93,107	212,606	-
Buffalo	17,838,729	12,588,690	9,517,297
Oswego	514,005	298,043	-
Totals, Vessel Shipments	24,321,686	15,884,595	9,710,063
By Rail			
U.S.A. Seaboard Ports	1,903,416	369,197	95,900
Other U.S.A. Points	4,955,295	2,774,413	976,631
Totals, Rail Shipments	6,858,711	3,143,610	1,072,531
Totals	31,180,397	19,028,205	10,782,594

* Does not include shipments of wheat to Duluth or Buffalo for drying in bond.

Total shipments of Canadian wheat to the United States, either for re-export or retention for domestic use, from the beginning of the current crop year to May 15 amounted to 31.2 million bushels, sharply higher than the 19.0 million and 10.8 million shipped during the corresponding periods of 1950-51 and 1949-50, respectively. In addition to current crop-year shipments shown in the above table, 15.2 million bushels of wheat have been shipped by rail and water to terminals at Duluth and Buffalo for drying in bond.

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

Ports	August 1, 1951 to April 30, 1952	August 1, 1950 to April 30, 1951
	- bushels -	
Collingwood	301,000	1,185,896
Midland	4,106,376	2,413,538
Owen Sound	1,426,039	413,975
Port McNicoll	3,528,654	2,085,592
Goderich	123,745	246,053
Sarnia	287,788	169,733
Walkerville	1,786	8,000
Humberstone	-	205,671
Toronto	5,672	124,154
Prescott	1,500	-
Totals	9,782,560	6,852,612

Rail Shipments of Wheat from Fort William-Port Arthur, 1948-49 to 1951-52

Month	1951-52	1950-51	1949-50	1948-49
		- bushels -		
August	283,914	122,532	158,893	51,283
September	435,068	123,256	131,711	30,017
October	159,667	73,543	122,482	46,274
November	465,193	133,847	92,334	138,600
December	1,387,827	1,517,624	342,946	1,740,405
January	5,839,567	4,394,047	277,502	3,794,391
February	3,618,007	3,303,248	240,087	3,720,733
March	1,564,586	3,476,161	423,774	1,511,072
April	107,061	1,196,236	2,305,727	659,467
May		462,676	124,533	884,171
June		356,443	96,626	330,348
July		199,603	52,122	469,797
Totals		15,359,216	4,368,737	13,376,558

Following the opening of lake navigation in early April, rail shipments of wheat from the Lakehead have fallen off sharply from those of previous months. This year's April rail shipments, at 107,061 bushels, were the lowest since October, 1950 and were also well below the April totals of recent years. Total rail shipments of wheat from the Lakehead during the first nine months of the current crop year amounted to 13.9 million bushels as against 14.3 million and 4.1 million for the comparable periods of 1950-51 and 1949-50, respectively.

Distribution of the April 1952 shipments by grade and destination is shown in the table below. About 90 per cent of the month's shipments went to destinations in Quebec and Ontario, with the balance going to the United States and the Maritimes.

Distribution of Rail Shipments of Wheat from Fort William-Port Arthur, April, 1952

Grade	P.E.I.	N.S.	N.B.	Que.	Ont.	U.S.A.
			- bushels -			
5 Wheat	-	-	-	-	1,500	-
6 Wheat	-	-	-	358	-	-
Amber Durum ...	-	1,500	1,500	21,667	8,951	-
Toughs	250	-	67	37,102	5,667	-
Damps	-	-	-	4,500	-	8,000
All Others	-	-	-	1,471	14,528	-
Totals ...	250	1,500	1,567	65,098	30,646	8,000

Freight Assistance Shipments — Claims filed for payment up to April 30, 1952 represent shipments of almost 11.0 million bushels of wheat from the Prairie Provinces to Eastern Canada and British Columbia under the freight assistance plan during the first eight months of 1951-52. This year's preliminary total, subject to upward revision with the filing of additional claims, is already 17 per cent greater than the revised total of 9.3 million bushels shipped during the August—March period of 1950-51.

Provincial Distribution of Freight-Assisted Wheat Shipments, 1951-52 and 1950-51

Month	Nfld.	P.E.I.	N.S.	N.B.	Que.	Ont.	B.C.	Total
				- thousand bushels -				
August, 1951	3	29	66	59	516	421	237	1,331
September	4	17	56	39	464	473	231	1,284
October	8	14	71	54	559	522	233	1,460
November	11	23	84	60	776	673	291	1,917
December	4	20	66	32	489	495	212	1,318
January, 1952	6	27	67	47	656	637	236	1,677
February	3	16	59	37	452	474	76	1,118
March	1	11	50	33	378	384	2	859
Totals 1/	41	155	521	360	4,291	4,079	1,519	10,964
Same period 1950-51								
Preliminary 2/ ...	26	149	458	290	3,602	3,026	1,389	8,940
Revised 1/	28	152	476	301	3,655	3,088	1,640	9,340

1/ Based on claims filed up to April 30, 1952.
2/ Based on claims filed up to April 30, 1951.

Preliminary data on freight-assisted millfeed shipments during the first eight months of 1951-52 represent a total of 352,829 tons, below both the preliminary and revised totals for the August—March period of 1950-51.

Provincial Distribution of Freight-Assisted Millfeed Shipments, 1951-52 and 1950-51

Province	Aug.1,1951 to Mar.31,1952	Aug.1,1950 to Mar.31,1951	
	Preliminary 1/	Preliminary 2/	Revised 1/
		- tons -	
Newfoundland	1,973	2,114	2,395
Prince Edward Island .	4,973	7,482	7,887
Nova Scotia	27,771	29,430	31,831
New Brunswick	23,420	24,067	25,801
Quebec	168,904	181,203	193,412
Ontario	97,422	108,358	117,072
British Columbia	28,366	26,502	33,308
Totals	352,829	379,156	411,706

1/ Based on claims filed up to April 30, 1952. 2/Based on claims filed up to April 30, 1951.

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

Year and Month	Overseas Clearances of Canadian Wheat 1/	Exports of Canadian Wheat to U.S.A. for Domestic Use and Grinding in Bond 2/	Customs Exports of Canadian Wheat Flour 3/	Total	Customs 4/ Exports of Wheat and Wheat Flour
		- thousand bushels -			
1949-50					
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	2,020	4,410	27,110	27,292
December	9,751	867	3,798	14,416	21,002
January	10,607	411	3,279	14,297	15,102
February	7,419	495	3,551	11,465	11,216
March	10,232	964	3,712	14,908	13,607
April	8,460	515	3,076	12,051	12,628
May	18,103	3,466	5,317	26,886	23,993
June	17,949	1,460	4,140	23,549	23,870
July	12,762	672	3,487	16,921	17,222
Totals	165,970	13,487	45,680	225,137	230,142
1950-51					
August	11,957	459	3,060	15,475	15,247
September	13,172	904	2,273	16,349	15,257
October	12,950	900	3,652	17,502	19,715
November	15,801	2,007	5,669	23,477	20,140
December	8,030	2,149	4,157	14,335	20,424
January	9,891	1,935	5,700	17,526	16,315
February	9,259	929	4,727	14,915	14,180
March	9,969	1,097	5,221	16,287	17,663
April	9,604	3,105	5,809	18,518	16,870
May	15,140	2,558	6,677	24,375	21,748
June	23,302	2,198	4,813	30,313	25,968
July	25,662	2,062	4,163	31,888	33,097
Totals	164,736	20,303	55,921	240,961	236,624
1951-52 5/					
August	16,921	2,240	2,581	21,742	27,182
September	16,726	2,376	3,151	22,253	22,161
October	23,764	3,830	3,851	31,445	24,212
November	29,830	5,687	4,033	39,550	34,671
December	12,075	4,701	3,683	20,459	37,347
January	14,382	1,620	3,407	19,409	18,523
February	16,010	2,574	3,103	21,687	18,472
March	15,876	1,215	5,054	22,145	21,904
April	16,657	3,342	5,355	25,354	30,516
Totals	162,241	27,586	34,218	224,046	234,989

1/ As compiled by the Statistics Branch, Board of Grain Commissioners for Canada.

2/ U.S.A. official figures used for imports of Canadian wheat for domestic use 1949-50. Data on shipments for grinding in bond since August 1949 and for domestic use since August 1950 have been compiled by the Statistics Branch, Board of Grain Commissioners for Canada, from returns of Canadian elevator licenses and shippers and advice from American grain correspondents.

3/ Exports for crop years 1949-50, 1950-51 and August, 1951 to January, 1952 revised to remove effect of time lag in the returns made by Customs. Subsequent months to be revised as data become available.

4/ Unadjusted, as published by the International Trade Division, D.B.S.

5/ Subject to revision.

Exports of Canadian Wheat and Wheat Flour, 1951-52

Destination	January	April		August—April	
	Wheat Flour 1/2/	Wheat Flour 2/	Wheat 3/	Wheat Flour 2/4/	Wheat 3/
	- bushels -	- bushels -		- bushels -	
COMMONWEALTH COUNTRIES					
United Kingdom	1,546,767	1,891,728	6,934,994	12,348,081	62,468,483
Africa					
Rhodesia	-	-	-	-	3,733
Union of South Africa	-	-	196,000	-	2,217,043
British West Africa					
Gambia	1,606	-	-	3,672	-
Gold Coast	576	-	-	108,837	-
Nigeria	3,416	5,607	-	61,528	-
Sierra Leone	459	4,590	-	33,719	-
Asia					
Aden	25,713	-	-	32,134	-
British Malaya	6,889	22,621	-	47,002	-
Ceylon	-	383,107	-	383,107	-
Hong Kong	33,768	121,248	-	1,017,432	-
India	-	-	2,007,991	90	9,287,804
Europe					
Gibraltar	21,483	39,681	-	195,562	-
Malta	-	-	-	-	1,164,901
North America					
Bahamas	22,689	21,883	-	183,941	-
Barbados	33,372	30,452	-	317,075	792
Bermuda	7,631	7,119	-	88,992	-
British Honduras	2,768	2,984	-	38,358	-
Jamaica	6,084	95,328	-	965,858	-
Leeward and Windward Islands	77,567	74,943	-	711,108	-
Trinidad and Tobago	213,952	240,629	-	1,884,078	-
South America					
British Guiana	77,445	49,356	-	666,342	-
Totals, Commonwealth Countries.	2,083,185	2,591,276	9,138,985	19,086,916	75,142,756
FOREIGN COUNTRIES					
Africa					
Azores and Madeira	-	-	-	20,133	-
Belgian Congo	41,441	32,319	-	319,946	-
Canary Islands	-	-	-	44,483	-
Egypt	-	2,025	-	197,568	424,015
French Africa	-	-	-	6,799	2,589,410
Liberia	563	-	-	5,549	-
Morocco	14,954	32,368	-	363,556	-
Portuguese Africa	6,854	15,242	-	161,574	-
Tripoli	-	51,412	-	51,412	445,180
Asia					
Arabia	26,829	8,307	-	113,575	-
Indonesia	13,865	376,204	-	694,440	-
Iraq	-	-	-	513	-
Israel	-	333,842	211,680	333,842	1,176,880
Japan	-	50,787	1,916,243	279,152	12,696,269
Lebanon	29,867	449,807	-	1,087,102	-
Philippine Islands	461,925	174,388	-	3,479,683	-
Portuguese Asia	3,443	-	-	50,265	-
Siam	8,446	8,721	-	130,841	-
Syria	10,809	-	-	579,775	2,398,180

Exports of Canadian Wheat and Wheat Flour, 1951-52

Destination	January	April		August—April	
	Wheat Flour 1/2/	Wheat Flour 2/	Wheat 3/	Wheat Flour 2/4/	Wheat 3/
	- bushels -	- bushels -		- bushels -	
FOREIGN COUNTRIES					
Europe					
Belgium	-	-	470,923	-	12,196,284
Denmark	-	-	-	918	537,600
Finland	-	-	-	-	315,000
France	-	-	459,000	5,278	5,356,756
Germany	81,454	23,769	52,267	238,536	6,332,933
Greece	11,475	10,247	-	56,592	-
Iceland	18,185	1,629	-	89,460	-
Ireland	-	-	666,867	-	5,720,935
Italy	4,590	221,049	1,281,000	265,406	7,040,957
Netherlands	-	-	-	-	7,258,388
Norway	-	-	66,295	-	2,906,955
Portugal	-	2,066	-	26,190	-
Spain	-	-	-	-	304,500
Sweden	-	-	-	-	1,313,418
Switzerland	-	-	410,667	-	6,019,337
Yugoslavia	2,065	1,836	-	27,998	1,092,277
North America					
Costa Rica	36,149	40,307	-	300,070	41,867
Cuba	109,021	240,286	762,004	1,821,636	922,734
Dominican Republic	28,949	41,904	-	211,527	3,800
El Salvador	44,793	37,233	-	242,689	-
French West Indies	1,058	112	-	4,198	-
Guatemala	30,992	14,895	-	276,296	-
Haiti	88,371	54,842	-	389,547	-
Honduras	2,061	-	-	4,819	10,000
Netherlands Antilles	19,800	16,785	-	144,612	-
Nicaragua	22,959	11,538	-	140,674	-
Panama	22,729	18,279	-	164,794	-
St. Pierre and Miquelon	-	1,827	-	12,123	-
United States					
Flour in terms of wheat	9,063	3,218	-	261,914	-
For grinding in bond 5/	-	-	923,043	-	4,268,561
For domestic use 5/	-	-	2,418,678	-	23,317,457
Virgin Islands	765	2,295	-	10,854	-
Oceania					
French Oceania	7,587	-	-	35,019	-
Guam	-	-	-	45	-
Hawaii	-	-	-	6,656	-
South America					
Bolivia	2,295	-	235,080	27,329	1,082,174
Brazil	-	-	-	-	3,824,012
Chile	-	-	364,062	-	2,578,566
Colombia	38,264	28,156	-	173,083	233,322
Ecuador	47,673	4,554	-	236,340	55,115
Peru	-	-	611,893	-	2,211,723
Surinam	10,877	9,774	-	74,349	-
Venezuela	63,410	41,737	9,989	1,962,081	9,989
Totals, Foreign Countries	1,323,581	2,363,760	10,859,691	15,131,241	114,684,594
Totals	3,406,766	5,355,036	19,998,676	34,218,157	189,827,350

1/ Exports for January, 1952 revised to remove effect of time lag in the returns made by Customs.

2/ In terms of wheat equivalent. Source: Canadian Customs returns. Conversion rate: 4 1/2 bushels of wheat equal 1 barrel of 196 pounds of wheat flour.

3/ Overseas clearances as reported by the Statistics Branch of the Board of Grain Commissioners for all countries except the United States. Subject to revision.

4/ Exports for August, 1951 to January, 1952 revised to remove effect of time lag in the returns made by Customs.

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

Canadian Wheat Board Weekly Average Cash Wheat Prices
Basis in Store Fort William—Port Arthur or Vancouver

Class and Grade	Week ending			
	May 3	May 10	May 17	May 24
	- cents and eighths per bushel -			
Initial Payment to Producers 1951-52 Pool				
1 Hard	160	160	160	160
1 Northern	160	160	160	160
2 Northern	157	157	157	157
3 Northern	154	154	154	154
4 Northern	146	146	146	146
5 Wheat	136	136	136	136
6 Wheat	126	126	126	126
Feed Wheat	120	120	120	120
Domestic and Export 1/ (International Wheat Agreement)				
1 Hard	176/4	177	177/4	177/2
1 Northern	176/4	177	177/4	177/2
2 Northern	174/4	175	175/4	175/2
3 Northern	172/4	173	173/4	173/2
4 Northern	166/4	167	167/4	167/2
5 Wheat	162/4	162	162/4	162/2
6 Wheat	153/4	154	154/4	154/2
Feed Wheat	147/4	148	148/4	148/2
1 C.W. Garnet	174/4	175	175/4	175/2
2 C.W. Garnet	173/4	174	174/4	174/2
3 C.W. Garnet	170/4	171	171/4	171/2
1 Alberta Red Winter	176/4	177	177/4	177/2
2 Alberta Winter	174/4	175	175/4	175/2
3 Alberta Winter	172/4	173	173/4	173/2
1 C.W. Amber Durum	176/4	177	177/4	177/2
2 C.W. Amber Durum	174/4	175	175/4	175/2
3 C.W. Amber Durum	173/4	174	174/4	174/2
Export - Class II				
1 Hard	226/4	227	227/4	227/2
1 Northern	226/4	227	227/4	227/2
2 Northern	224/4	225	225/4	225/2
3 Northern	222/4	223	223/4	223/2
4 Northern	216/4	217	217/4	217/2
5 Wheat	168/4	168	168/4	168/2
6 Wheat	159/4	160	160/4	160/2
Feed Wheat	153/4	154	154/4	154/2
1 C.W. Amber Durum	233/4	234	234/4	234/2
2 C.W. Amber Durum	231/4	232	232/4	232/2
3 C.W. Amber Durum	230/4	231	231/4	231/2

1/ Plus 6 cents carrying charge.

CANADIAN FLOUR MILLING SITUATION

Production Wheat flour production reported by Canadian mills for April 1952 amounted to almost 2.0 million barrels, the highest monthly total for the current crop year. While this year's April output was 2.5 per cent greater than the March total, it was 5.5 per cent below the April 1951 production of 2.1 million barrels. Mills reporting operations during April 1952 had a rated daily capacity of 95,669 barrels and, on the basis of a 25-day working period, 82.5 per cent of this capacity was effective. Mill grindings of wheat during the month totalled 9.0 million bushels compared with 8.8 million in March and 9.5 million in April 1951.

Exports According to preliminary Customs returns, exports of Canadian wheat flour during April 1952 amounted to 1,190,008 barrels (5.4 million bushels of wheat equivalent), reaching a new peak for current crop-year monthly exports. Flour shipments during the month were reported to 50 countries and colonies, with the largest amount, some 1.9 million bushels of wheat equivalent, going to the United Kingdom. Other major shipments, in thousand bushels of wheat equivalent, went to Lebanon (450), Ceylon (383), Indonesia (376), Israel (333), Trinidad and Tobago (241), Cuba (240), and Italy (221).

Wheat Milled for Flour, and Production and Exports of Wheat Flour, Canada

Crop Year	Wheat Milled for Flour	Wheat Flour	
		Production	Exports 1/
	- bushels -	- barrels of 196 pounds -	
1935-36—1939-40 average	67,845,114	15,002,781	4,899,970
1940-41—1944-45 average	99,704,638	22,402,166	12,091,605
1945-46	118,074,774	26,435,341	14,470,177
1946-47	127,775,176	28,588,456	16,896,233
1947-48	109,822,011	24,159,696	13,661,573
1948-49	90,896,984	20,379,997	10,687,561
1949-50	90,082,917	20,259,200	10,151,090
1950-51	106,748,343	23,630,180	12,426,996
1951-52			
August	7,747,885 2/	1,699,569 2/	573,624
September	8,173,807 2/	1,797,624 2/	700,228
October	8,832,670 2/	1,926,302 2/	855,721
November	8,957,474 2/	1,944,215 2/	896,318
December	8,064,982 2/	1,755,062 2/	818,436
January	8,505,951 2/	1,844,408 2/	757,059
February	8,378,104 2/	1,812,383 2/	689,470
March	8,804,729 2/	1,926,301 2/	1,123,171
April	8,994,401 2/	1,973,994 2/	1,190,008
Totals	76,460,003	16,679,858	7,604,035

1/ Based on Customs returns. Exports for the crop years 1945-46 to 1950-51 and August, 1951 to January, 1952 revised to remove effect of time lag in the returns made by Customs. Subsequent months to be revised as data become available.

2/ Subject to revision.

UNITED STATES SITUATION

Supply Position Continuing heavy exports of wheat as grain have been the main factor in raising total exports of United States wheat and wheat products to above the 400-million bushel level in the ten months ending April 30, 1952. Preliminary data on exports of wheat as grain during the July—April period of the current crop year indicate a total of 368.0 million bushels, up sharply from the 239.4 million exported during the comparable ten-month period of 1950-51. On the other hand, exports of wheat flour and macaroni in terms of wheat, at 37.2 million bushels, are practically unchanged from last year's 37.4 million. Combined exports of wheat and wheat products, at 405.2 million bushels, represent an increase of approximately 46 per cent over the 276.8 million bushels exported during the first ten months of 1950-51.

United States Wheat Supplies

Item	1951-52 1/	1950-51
	- million bushels -	
Carryover at July 1	396.2	424.7
New crop	987.5	1,019.4
Total estimated domestic supplies	1,383.7	1,444.1
Imports of wheat for domestic use, July 1—April 30	25.4	8.3
Total estimated supplies 2/	1,409.1	1,452.4
Less estimated domestic requirements for crop year 3/	705.0	694.4
Available for export and carryover	704.1	758.0
Deduct:		
Exports of wheat as grain, July 1—April 30	368.0	239.4
Exports of wheat flour and macaroni in terms of wheat, July 1—April 30	37.2	37.4
Total exports of wheat, wheat flour and macaroni	405.2	276.8
Balance on May 1 for export and carryover	298.9	481.2

1/ Preliminary.

2/ Excluding imports for May—June period.

3/ Includes allowances for shipments of United States wheat and wheat products to Alaska, Hawaii, Puerto Rico, Guam, Samo, Virgin Islands and Wake Island. These shipments are not included in exports as set out in the table.

The United States Department of Agriculture announced on May 22 that the Commodity Credit Corporation had confirmed sales of all but 1.5 million bushels of the United States quota of 255.1 million bushels under the International Wheat Agreement for the current crop year. This means that, except for the unfilled part of this year's quota, further sales will be at "free" market prices (currently 50 to 60 cents above the I.W.A. maximum) until 1952-53 quotas are open. The sustained heavy volume of exports has been reflected in the reduction of current wheat supplies to levels well below those of last year. The balance remaining on

May 1, 1952 for export and carryover was estimated at 298.9 million bushels as against 481.2 million a year ago.

Winter Wheat Crop Forecast at 986 Million Bushels — On May 9 the Crop Reporting Board of the Bureau of Agricultural Economics, United States Department of Agriculture, forecast the 1952 production of winter wheat in the United States at 986 million bushels, 40 million more than indicated on April 1. According to the report, "In general, weather conditions during April favoured growth and development of the crop throughout most of the country. The most important factor contributing to the continued improvement in the crop has been the rather generous April rainfall over much of the important southwestern wheat producing areas. However, the extent of the gain has been modified by damage in this same area by the severe freeze which occurred April 9—10. The full extent of the damage from this cause cannot be determined until the crop enters the "filling" stage. A winter wheat crop as large as now indicated would be exceeded only by the crops of 1947 and 1948. The current crop is 53 per cent larger than the 645 million bushel crop of 1951 and about one-fourth larger than the 10-year average of 800 million bushels.

The Nation's winter wheat acreage remaining for harvest is estimated at 51,081,000. This acreage is 28 per cent larger or nearly 11 1/3 million acres more than that harvested in 1951 and 5.8 million acres more than the average for the previous 10 years. In only three years—1947, 1948, and 1949—has winter wheat harvested acreage exceeded that indicated for harvest this year. The portion of the crop that will not be harvested for grain is estimated at 9.2 per cent of the seeded acreage, compared with 28.7 per cent last year and the 10-year average of 10.1. Based upon crop conditions as of May 1, the prospective yield per harvested acre is 19.3 bushels, 3.1 bushels more than in 1951, and 1.6 bushels more than average. ....

The Kansas wheat crop made generally good to excellent progress during April and at 255 million bushels is indicated to be the second largest of record. Soil moisture conditions are the most favourable in years, but the rank growth of the plants will draw heavily on this moisture supply when temperatures are high. In the southwestern part of the State the dry fall and winter, heavy infestation of mites, and the April 10 freeze resulted in rather large abandonment and thinning of stands in a few counties. It is difficult to fully appraise the extent of the freeze injury to the Kansas crop. However, it is believed that the damage is limited to the more advanced fields in the southwestern area.

In Oklahoma and Texas, rainfall in April replenished the soil moisture supplies over virtually all the important wheat areas. The freeze gave the early crop a decided set back. Many tillers of early varieties were killed and reports indicate some heads now appearing are sterile. However, some new tillers are developing which should offset part of the loss that otherwise would be expected. The additional moisture in April was beneficial particularly to the late varieties. Production prospects improved in Texas compared with April 1 but were slightly less in Oklahoma. ....."

Flour Production — In a report released on May 12 the Bureau of Census, United States Department of Commerce, estimated wheat flour production in March at 17,920 thousand sacks, or an average of 853 thousand sacks per working day, compared with 882 thousand sacks per working day in February and 896 thousand sacks per day in March 1951. Wheat flour mills in March operated at 76.5 per cent of capacity compared with 79.1 per cent the previous month.

Daily Cash Wheat Prices on the Kansas City and Minneapolis Markets

No. 2 Hard Winter, Kansas City		No. 1 Northern Spring, Minneapolis	
Date	Price	Date	Price
	cents per bushel		cents per bushel
April 26, 1952	247 - 249 1/2	April 26, 1952	240 - 242
28	246 3/8 - 248 3/4	28	241 1/4 - 243 1/4
29	245 3/4 - 249 1/2	29	240 5/8 - 243 5/8
30	247 3/4 - 249 1/2	30	238 3/4 - 241 3/4
May 1	247 3/4	May 1	239 7/8 - 242 7/8
2	248 - 250	2	239 1/8 - 242 1/8
3	247 3/4	3	240 - 243
5	249 - 250 1/2	5	241 3/8 - 245 3/8
6	247 - 250	6	243 5/8 - 247 5/8
7	248 1/2 - 249	7	243 5/8 - 247 5/8
8	248 - 250	8	245 - 249
9	247 - 248	9	242 1/2 - 246 1/2
10	243 1/2 - 244 1/2	10	241 1/8 - 245 1/8
12	238 1/2 - 242	12	240 1/8 - 243 1/8
13	239 1/2	13	240 - 243
14	240 - 241 1/2	14	238 7/8 - 241 7/8
15	237 3/4 - 243 1/4	15	238 5/8 - 241 5/8
16	243 1/4 - 244	16	239 1/2 - 242 1/2
17	243 1/4 - 244 3/4	17	241 7/8 - 244 7/8
19	244 - 247 1/2	19	241 1/8 - 244 1/8
20	244 1/2 - 246	20	240 - 243
21	239 - 247	21	238 7/8 - 242 7/8
22	243 1/4 - 244 1/4	22	239 7/8 - 243 7/8
23	244 - 246 1/2	23	239 3/8 - 243 3/8
24	239 - 245	24	239 7/8 - 243 7/8

Chicago Wheat Futures, High Points of Closing

Date	May	July	September	December	March
		- cents and eighths per bushel -			
April 26, 1952	242/5	235/7	237/4	241/2	
28	243/5	237	238/4	242/2	
29	243	236/2	237/7	241/2	
30	241	234/4	236/2	239/6	243/2
May 1	241/5	235/2	237/3	241/1	243/6
2	241/3	234/4	236/4	240/3	243/4
3	242	234/5	236/6	240/5	243/7
5	246/3	236/4	238/3	242/4	245/3
6	247/5	237	239	242/7	245/7
7	246/4	236/5	238/4	242/4	245/5
8	247/7	237/3	239/3	243/2	246/2
9	246/3	235/4	237/4	241/4	244/5
10	245/3	234/4	236/4	240/3	243/5
12	245	234/4	236/5	240/5	243/6
13	244/6	235/6	237/7	241/7	245
14	244/2	234/5	236/6	240/7	244
15	245	234/6	236/7	240/7	243/6
16	246/6	234/7	236/6	240/6	244/2
17	247/3	235/6	237/6	241/5	244/6
19	246/7	235/5	237/6	241/5	244/6
20	245/7	234/1	236/2	240/2	243/2
21	250/4	234/1	236/2	240/1	243/4
22		235/4	237/5	241/7	244/6
23		234/1	236/4	240/5	243/3
24		235	237/6	241/3	244/4

ARGENTINE SITUATION

Supply Position In the absence of any new developments affecting current crop year wheat supplies in the Argentine, interest is now centred on the probable size of the acreage to be seeded to the 1952-53 crop. While the government's announcement of substantial increases in the prices to be paid to producers for wheat is expected to be reflected in a considerably greater area than last year's 11.9 million acres, growers' apprehensions about rising costs of production may offset to some extent the incentive of higher prices.

Since total estimated wheat supplies for 1951-52 amount to only 95.5 million bushels, well below normal domestic requirements, export movement has been confined to relatively small shipments against old contracts. During the first five months of the current crop year total exports of wheat and wheat flour amounted to only 3.7 million bushels, in sharp contrast to 47.3 million during the December—April period in 1950-51. The balance remaining on May 1, 1952 for export and carryover was estimated at 3.6 million bushels as against 58.9 million a year ago.

Argentine Wheat Supplies

Item	1951-52 1/	1950-51 2/
	- million bushels -	
Carryover at beginning of crop year (December 1)	11.0	7.3
New crop	84.5	213.1
Total estimated supplies	95.5	220.4
Less estimated domestic requirements for crop year ...	88.2	114.2
Available for export and carryover	7.3	106.2
Deduct:		
Exports of wheat as grain, December 1—April 30	3.7	47.3
Exports of wheat flour in terms of wheat, December 1—April 30	3/	3/
Total exports of wheat and wheat flour	3.7	47.3
Balance on May 1 for export and carryover	3.6	58.9

1/ Preliminary; based on information obtained from trade and other sources.

2/ Subject to revision.

3/ Less than 50,000 bushels.

The following account of the Argentine grain situation has been extracted from a report from Mr. W. B. McCullough, Agricultural Secretary, Canadian Embassy, Buenos Aires, under date of May 15, 1952, and is reproduced with the kind permission of the Trade Commissioner Service, Department of Trade and Commerce. Where practicable, conversions from Argentine to Canadian measures have been made for the convenience of our readers. Currency conversions have been made at the rate of 5 pesos to the United States dollar.

Weather and Crops Although rainfall has been light throughout most of the cereal belt over the past four weeks, moisture conditions have been fairly satisfactory in most areas except in the west of the province of Buenos Aires, Eva Perón (ex La Pampa) and southwestern Córdoba. In these districts the soil became too hard to plow and preparations for seeding wheat and flax have been delayed. Throughout the rest of the province of Buenos Aires and in the province of Santa Fé moisture conditions are normal. Most producers have been able to sow coarse grains for winter pasture and the dry weather has favoured the harvesting of corn.

Pastures improved following the heavy rains in March but in some areas feed is again short and further rainfall is required.

1952-53 Wheat Crop In areas where moisture conditions permit farmers are actively engaged in preparing land for the forthcoming wheat crop. Early indications are that preference is being given to wheat as against flax since the officially fixed price at 50.00 pesos per 100 kilos ($2.72 per bushel) for wheat favours this grain. Although there is no great enthusiasm to sow wheat this season a substantial increase in sowings is expected, particularly in the areas of Córdoba, Eva Perón (ex La Pampa) and districts of Santa Fé that suffered from severe drought last season.

While the official grain prices were announced well in advance of seeding and represented unprecedented increases over previous years, nevertheless there is among producers some anxiety that with the increased cost of production the prices may not be as attractive at harvest time as they now appear. In order to dispel these doubts there have been official announcements and intimations to the effect that I.A.P.I. would absorb the increased cost in freight rates on grain and that should other costs rise above those calculated at the time the new prices were announced, the State would absorb these differences to ensure that the producer would have an adequate return for his labour.

Grain Shipments Grain shipments from Argentina in April at 91,596 metric tons showed a slight improvement over those in March which reached a record low of 82,975 tons. Corn shipments at 54,237 tons (2,135,000 bushels) were up from last month and were destined chiefly for France which took 36,423 tons (1,434,000 bushels). Germany was the only customer for barley with 18,181 tons (835,000 bushels) an improvement over the 10,030 tons (461,000 bushels) shipped last month. Exports of oats and rye at 970 tons (63,000 bushels) and 15,923 tons (627,000 bushels), respectively, were both down, Belgium being the sole destination for oats and Finland taking two-thirds of the rye. No flax was shipped in April.

Small parcels of wheat continued to be shipped to Paraguay against old contracts during April, totalling 2,285 tons (84,000 bushels). That country normally imports about 30,000 tons of wheat (1,102,000 bushels) per annum from Argentina and barely half that quantity had been shipped at the end of the first four months of the current year, and no prospects of obtaining the remainder this year. It is understood that Paraguay has purchased about 10,300 tons (378,000 bushels) of wheat from the United States.

Aggregate shipments of grain in the first four months of 1952 were at 586,134 tons, which total was exceeded in one month alone as recently as 1948 and is nearly 60 per cent less than shipments effected in the corresponding period of last year and little over one-fifth of the total for the same period in 1948.

Exports of wheat in the first four months of 1952 have been confined to Brazil, Peru and Paraguay and the total for this grain at 58,438 tons (2,147,000 bushels) is little over 5 per cent of the exports effected in the corresponding four months last year. Corn, at 257,615 tons (10,142,000 bushels) compares favourably with last year's meagre exports in the four-month period at 10,884 tons (428,000 bushels) but is 50 per cent less than in 1950.

Sweden was Argentina's chief customer for grains during the first four months of the year, purchasing a total of 160,803 tons, followed by Germany with 99,770 tons and France with 89,376 tons. Belgium, Finland and Brazil were next in importance, but the latter procured only 28,550 tons of wheat (1,049,000 bushels) compared to normal purchases of up to 100,000 tons (3,674,000 bushels) per month.

The following are Argentine grain shipments per destination for the first four months of 1952:

Argentine Grain Shipments, January—April, 1952

Destination	Wheat	Corn	Flax	Oats	Rye	Barley
			- thousand bushels -			
Austria	-	374	-	-	-	-
Belgium	-	1,509	71	63	146	-
Brazil	1,049	-	-	6	-	-
Chile	-	-	9	-	-	-
Denmark	-	-	-	-	-	607
Finland	-	-	-	-	1,352	-
France	-	2,905	614	-	-	-
Germany	-	514	25	337	567	3,054
Holland	-	203	19	534	285	191
Norway	-	79	79	-	110	-
Paraguay	518	-	-	-	-	-
Peru	580	288	-	-	-	-
Sweden	-	3,352	81	834	1,664	850
Switzerland	-	163	-	595	70	78
United Kingom ..	-	639	7	-	-	-
Yugoslavia	-	118	-	-	-	-
Totals	2,147	10,142	905	2,368	4,193	4,779

AUSTRALIAN SITUATION

Supply Position Reduction by the International Wheat Council of Australia's current crop year quota under the I.W.A. from 88.7 million to 72.0 million bushels confirms earlier indications that Australian wheat supplies would be inadequate to meet this year's commitments. On the basis of total estimated supplies of 180.9 million bushels and domestic requirements of 84.0 million, supplies available for export and carryover during the current crop year amounted to 96.9 million bushels. Of this amount, some 30.6 million bushels were exported as wheat and wheat flour in terms of wheat in the December 1—April 26 period.

Exports of wheat as grain, at 17.5 million bushels, are little more than half the 34.5 million exported during the corresponding period in 1950-51. Three countries—New Zealand, the United Kingdom and India—together have taken about 74 per cent of this year's exports of Australian wheat to date. While exports of wheat as flour, at 13.1 million bushels, are below last year's comparable figure of 15.5 million, the reduction has not been nearly so sharp as in wheat as grain. The balance remaining on April 27 for export and carryover at the end of the crop year was estimated at 66.3 million bushels as against 93.8 million a year ago.

Australian Wheat Supplies

Item	1951-52 1/	1950-51 2/
	- million bushels -	
Carryover at November 30 (including flour as wheat) ...	19.5	43.9
New crop	161.4	184.2
Total estimated supplies	180.9	228.1
Less estimated domestic requirements for crop year	84.0 3/	84.3 3/
Available for export and carryover	96.9 3/	143.8 3/
Deduct:		
Exports of wheat as grain, December 1—April 26	17.5	34.5
Exports of wheat flour in terms of wheat December 1—April 26	13.1	15.5
Total exports of wheat and wheat flour	30.6	50.0
Balance on April 27 for export and carryover	66.3	93.8

1/ Preliminary.

2/ Subject to revision.

3/ Revised.

Australian Cable The following cable, dated May 23, 1952, has been received from the Agricultural Secretary for Canada in Melbourne:

"Australian wheat stocks at May 10th totalled 98,656,000 bushels. Wheat exports from December 1st 1951 to May 10th totalled 20,093,000 bushels, with shipments during the preceding six weeks mainly to the United Kingdom, India, and New Zealand. Flour exports for the same period were 288,567 long tons, with 14,316 to Malaya, 13,342 to Indonesia, 12,267 to Ceylon, 8,778 to India, and 7,385 to the United Kingdom. Ten thousand tons wheat reported sold to Egypt within I.W.A. during past month. Wheat Board at meeting yesterday reaffirmed its policy not to pay freight on interstate movement of wheat and as Queensland Government refuses to pay freight on wheat brought into Queensland presumably the 4/1 Commonwealth subsidy will lapse. Poultry farmers are urging Government to increase wheat subsidy from 4/1 to 6/1."

CALENDAR OF WHEAT EVENTS, MAY, 1952

1 - The International Wheat Council reduced Australia's quota under the I.W.A. for the current crop year from 88.7 million bushels to 72.0 million bushels. Of this reduction of 16.7 million bushels, some 5.5 million was allotted to increase Canada's export quota, raising it from 233.0 million to 238.5 million bushels. The remaining export quota of 11.2 million bushels was not assigned although there were indications that the United States might take over part of it should current winter wheat crop prospects in that country be maintained.

6 - According to the Ministry of Agriculture, the area under wheat in Great Britain is expected to be about 1,976,000 acres at June 1, about 4 per cent less than last year's 2,060,000 acres.

8 - The Italian wheat crop has been officially forecast at 257.6 million bushels, slightly higher than last year's 253.0 million but about 20 million bushels less than the 1935-39 average. This year's acreage is placed at 11,542,000 compared with 11,676,000 last year.

9 - The 1952 United States winter wheat crop, based on conditions at May 1, was forecast at 986 million bushels, 40 million bushels more than indicated on April 1. A winter wheat crop of the size indicated would be 53 per cent larger than the 645 million bushel crop of 1951 and about one-fourth larger than the ten-year average of 800 million bushels.

12 - The Chairman of the International Wheat Council, which adjourned its eighth session on May 9 in London, issued a statement summarizing the Council's proceedings. A continuing committee, set up to investigate the question of flexibility in price ranges and other matters requiring further study in the proposed extension of the present agreement, will report to the next regular bi-annual session of the Council which begins on July 1.

13 - Broomhall reports that seeding of spring grains in the Ukraine has been completed with acreage goals exceeded by one per cent. Acreage seeded to wheat is estimated at 17 per cent greater than last year.

20 - On the basis of their intentions at April 30, Canadian farmers have indicated that they will seed 25.0 million acres of spring wheat in 1952 compared to 24.6 million last year. Acreage seeded to winter wheat in Ontario, the major producing area for this crop, is placed at 640,000 acres.

Winterkilling of Ontario winter wheat during the past winter was estimated at 8 per cent of last fall's seeded acreage, compared with an estimated 7 per cent in the previous winter.

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