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THE WHEAT REVIEW



SEPTEMBER, 1951



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Department of Trade and Commerce

THE
WHEAT REVIEW

SEPTEMBER, 1951

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WORLD WHEAT SITUATION

Current Supplies The latest available estimates indicate that supplies of wheat remaining on or about September 1, 1951 in the four major exporting countries for export and carryover at the end of their respective crop years amounted to 1232 million bushels, practically unchanged from the 1231 million bushels available a year ago. There has, however, been a marked shift in the location of this year's exportable supplies, with an indicated increase of 180 million bushels in Canada offsetting decreases in the other three major exporting countries.

Supplies this year (to nearest million bushels) were held as follows, with last year's figures in brackets: United States, 577 (714); Canada, 593 (413); Australia, 47 (75); and Argentina, 15 (29). Data for all countries include both commercial and on farm stocks. It should be noted that this year's Canadian supplies are based on the September estimate of production and, in view of the recent extremely unfavourable harvesting conditions experienced in Western Canada, later estimates may result in significant changes in the Canadian supply position.

World 1951 Breadgrain Crop According to the September 24 issue of "Foreign Crops and Markets" published by the United States Department of Agriculture "World breadgrain production in 1951 is tentatively forecast at about 245 million short tons.....The indicated production for wheat and rye, if achieved, would be one of the largest on record, comparing with the record production of 248 million tons in 1938. The outturn is forecast about 5 per cent larger than in 1950, with increases reported for North America, Soviet Russia and Asia. A small net increase is also estimated for Europe, reductions in most of western Europe being more than offset by better outturns in eastern and central Europe. The increase in the prospective world outturn is in wheat, with rye less than the below-average harvest of 1950.

Wheat production is now forecast at 6.65 billion bushels, compared with 6.32 billion in 1950 and the 1935-39 average of 6.02 billion. The wheat crop in the traditionally deficit area of western Europe is smaller than that of 1950, increasing import needs in most of those countries. Spain is the outstanding exception for the area. Production there appears to be about 40 million bushels larger than the 1950 harvest. A larger part of Europe's import needs this season will be dependent upon supplies from the Northern Hemisphere exporters, since both Argentina and Australia are expected to have smaller crops than in 1950. Prospects are below average in both countries because of reduced acreage.

In North America wheat production is forecast at 1.6 billion bushels. This would be the largest wheat crop of record for the Continent. A record crop of 579 million bushels is in prospect for Canada, while the United States crop is almost a billion bushels following 7 successive crops of over a billion bushels. The United States acreage for harvest is a little above 1950, but yields are a little lower, averaging 16 bushels per acre compared with 16.6 in 1950. The current estimate includes 651 million bushels of winter and 348 million of spring wheat. Canada's crop, in contrast, is about 95 per cent spring wheat.....

Total wheat production in Europe is now forecast at 1,565 million bushels. This compares with 1,520 million in 1950 and the 1935-39 average of 1,599 million. Conditions were less favourable than last season in most of the western European countries. Reduction appears greatest in Italy, France and the United Kingdom. In addition, the Low Countries report smaller harvests as did Scandinavia. Spain, in contrast, reports the largest crop since 1934. This largely offsets reductions in the other principal producing countries of western Europe.

Conditions in central and eastern Europe were better than in 1950, especially in the Balkans, where drought last year reduced crops. Yields in Yugoslavia and Rumania are reported considerably larger than those of a year ago. Larger crops are reported for Hungary, Bulgaria, and Greece also. Some increase over the 1950 harvest is reported for western Germany and also seems in prospect for Poland, Czechoslovakia, and eastern Germany.

These central European countries are especially important in the production of rye, with Poland, Germany, and Czechoslovakia alone accounting for about 70 per cent of Europe's prewar rye crop. Conditions were reported less favorable for rye than for wheat, and the total production for Europe is estimated to be slightly less than the below-average crop of 1950.

Latest information on the Soviet Union substantiates earlier reports of prospects for an increased wheat crop, compared with the 1950 harvest. A smaller rye crop, however, is estimated, with some shift from rye to wheat acreage taking place.... Trade agreements for the current marketing season may be indicative of the larger wheat crop, the most recent being the agreement with the United Kingdom, which calls for delivery of 200,000 tons of wheat, out of a total of one million tons of grain. Wheat was not included in the previous Soviet-British trade agreements. Other bilateral agreements entered into by the Soviets in recent months include one with Egypt calling for an exchange of wheat for Egyptian rice and cotton and an agreement to supply India a moderate quantity of wheat.

The wheat harvest in Asia is expected to be about 5 per cent larger than the good 1950 outturn. Reported increases for Turkey and China account for the bulk of the increase. Crops in Japan and Manchuria were also reported better than in 1950. These substantial increases more than offset reductions in most countries of the Middle and Near East. Widespread drought reduced outturns in many of those countries. Latest reports indicate little change from the 1950 wheat harvest in India and Pakistan. Turkey is the only rye producer of significance in Asia. Definite information on the production for 1951 is not available, but indications point to some increase over the large 1950 outturn.

The wheat crop in Africa is estimated to be smaller than in 1950. Unfavorable conditions in Algeria and Tunisia reduced harvests significantly in those two countries. The reductions were only partly offset by increased production in Egypt and a small increase in French Morocco. Prospects are good for the crop in the Union of South Africa, where harvesting begins November/December, and the production may approach the record harvest of a year ago. Rye is of no significance in Africa.

It is early for definite information on the crop in South America, but prospects are less favorable than at this time a year ago. Reduced acreage in Argentina is an important factor in the over-all outlook, since Argentina normally accounts for 75 to 80 per cent of the continental total. Severe drought in northern and northwestern zones of that country prevented seeding the full acreage intended for wheat. Continued drought in certain areas is causing some apprehension as to yield prospects in those localities. Large flights of locusts are reported in Santa Fe and Cordoba, but control measures are in progress. Acreage in Chile, the second ranking wheat producer of the Continent, is also reported somewhat smaller than last year's area.

Prospects are for a smaller harvest in Australia, starting November/December. Wheat acreage is down about 8 per cent, compared with the acreage a year ago, on the basis of preliminary reports. The reduction from last year's low figure brings acreage to only 83 per cent of the 1935-39 average. The largest reduction is reported in New South Wales. Acreage in this State, normally the largest wheat producer, is now placed at 2.75 million acres, only 55 per cent of the large acreage in 1947-48. Acreage in Western Australia is maintained at the high level of a year ago (3.2 million acres) giving that State the largest area and Victoria, with reduced acreage falls into third place. This is a reversal of the usual order of Victoria in second place and Western Australia third. Reduced wheat seeding is partly attributed to unfavorable weather at seeding time and partly to some shift from wheat farming to more profitable sheep raising, and other causes."

Estimated World Production of Wheat, 1951 with Comparisons^{1/}

| Continent | Average | | 1949 | 1950 | 1951 ^{2/} |
|-------------------------|---------|---------------------|-------|-------|---------------------|
| | 1935-39 | 1940-44 | | | |
| - million bushels - | | | | | |
| North America | 1,086 | 1,365 | 1,531 | 1,509 | 1,596 |
| Europe | 1,599 | 1,350 | 1,500 | 1,520 | 1,565 |
| U.S.S.R.(Europe & Asia) | 1,240 | - | 1,100 | 1,110 | - |
| Asia | 1,498 | 1,500 | 1,410 | 1,535 | 1,610 |
| Africa | 143 | 134 | 159 | 165 | 159 |
| South America | 281 | 293 | 260 | 290 | 258 |
| Oceania | 177 | 122 | 223 | 190 | 170 |
| Totals | 6,024 | 5,735 ^{3/} | 6,185 | 6,320 | 6,650 ^{3/} |

^{1/} Based on compilations and estimates of the Office of Foreign Agricultural Relations, U.S.D.A. ^{2/} Preliminary estimates.

^{3/} Includes allowance for U.S.S.R.

International Wheat Agreement
Sales and Purchases

Transactions under the I.W.A. recorded by the International Wheat Council up to September 14, totalled 182.6 million bushels or about 31 per cent of the 1951-52 guaranteed quantities. Leading purchasers under the agreement for the current crop year, with totals in millions of bushels, were: India, 25.3; the United Kingdom, 20.6; Germany, 20.6; the Netherlands, 13.0; and Italy, 10.2. Sales by the four exporting countries, in millions of bushels, were as follows: the United States, 86.1; Canada, 59.3; Australia, 37.3; and France, nil.

International Wheat Agreement Sales and Purchases, as of September 14, 1951
Together with Annual Quantities Guaranteed, Crop Year 1951-52

| Importing Countries | Guaranteed Purchases | Source | | | | Total Purchases |
|------------------------|-------------------------|-----------|---------|--------|---------|--------------------|
| | | Australia | Canada | France | U.S.A. | |
| - thousand bushels - | | | | | | |
| Austria | 11,023 | - | - | - | 797 | 797 |
| Belgium | 20,209 | - | 5,786 | - | 1,896 | 7,682 |
| Bolivia | 2,756 | - | 367 | - | 670 | 1,038 |
| Brazil | 13,228 | - | 1,729 | - | 7,810 | 9,538 |
| Ceylon | 6,614 | 3,961 | - | - | 1,448 | 5,410 |
| Costa Rica | 1,213 | - | 752 | - | 405 | 1,157 |
| Cuba | 7,422 | - | 3,935 | - | 3,464 | 7,399 |
| Denmark | 1,617 | - | 336 | - | - | 336 |
| Dominican Republic* | 876 | - | 537 | - | 348 | 886 |
| Ecuador * | 1,286 | - | 471 | - | 832 | 1,303 |
| Egypt | 14,697 | - | - | - | 4,107 | 4,107 |
| El Salvador | 404 | - | 164 | - | 184 | 348 |
| Germany | 66,139 | 2,904 | 2 | - | 17,679 | 20,584 |
| Greece | 15,726 | - | - | - | 4,960 | 4,960 |
| Guatemala | 919 | - | 177 | - | 146 | 323 |
| Haiti* | 1,029 | - | 419 | - | 684 | 1,102 |
| Honduras Republic* | 367 | - | 170 | - | 197 | 368 |
| Iceland | 404 | - | 48 | - | 42 | 90 |
| India | 55,116 | 2,547 | 14,933 | - | 7,778 | 25,258 |
| Indonesia | 3,674 | 477 | 3 | - | 881 | 1,361 |
| Ireland | 10,105 | 1,493 | 5,227 | - | 254 | 6,974 |
| Israel | 5,879 | - | 1,008 | - | 843 | 1,851 |
| Italy | 40,418 | 3,879 | 747 | - | 5,600 | 10,226 |
| Japan | 18,372 | - | - | - | - | - |
| Lebanon* | 2,388 | - | 8 | - | 2,441 | 2,449 |
| Liberia* | 37 | - | 25 | - | 11 | 36 |
| Mexico | 12,860 | - | - | - | 2,331 | 2,331 |
| Netherlands | 24,802 | 2,856 | 3,996 | - | 6,190 | 13,041 |
| New Zealand | 4,593 | 3,010 | - | - | - | 3,010 |
| Nicaragua* | 331 | - | 195 | - | 145 | 339 |
| Norway | 7,716 | - | 1,493 | - | 3,715 | 5,208 |
| Panama* | 625 | - | 303 | - | 322 | 625 |
| Peru | 5,512 | - | 1,130 | - | 1,864 | 2,993 |
| Philippines | 7,202 | - | 42 | - | - | 42 |
| Portugal | 5,626 | 1 | 72 | - | 1,161 | 1,233 |
| Saudi Arabia | 1,837 | 52 | - | - | 106 | 157 |
| Spain | 4,373 | - | - | - | - | - |
| Sweden | 2,756 | 1,493 | - | - | - | 1,493 |
| Switzerland | 6,430 | - | 3,024 | - | 2,082 | 5,106 |
| Union of S. Africa | 11,023 | - | 5,600 | - | 2,053 | 7,653 |
| United Kingdom ... | 177,068 | 14,615 | 4,446 | - | 1,529 | 20,589 |
| Venezuela | 6,246 | - | 2,140 | - | 1,082 | 3,223 |
| Totals | 580,917 | 37,288 | 59,285 | - | 86,055 | 182,627 |
| Guaranteed Sales . | | 88,700 | 232,979 | 4,089 | 255,149 | 580,917 |
| Balance | | 51,412 | 173,694 | 4,089 | 169,094 | 398,290 |

* Guaranteed quantity fulfilled.

CANADIAN SITUATION

Supply Position Potential supplies of Canadian wheat for the 1951-52 crop year amount to 765.7 million bushels, comprised of carryover stocks of 186.4 million bushels and the new crop estimated on the basis of conditions at August 31 at 579.3 million bushels. Total supplies of this magnitude would be about 192 million bushels greater than in 1950-51 and have been exceeded only in the five-year period, 1940-41 to 1944-45, when carryover stocks were at unusually high levels. Peak supplies occurred in 1942-43 when the total reached 980.4 million bushels, while the greatest supplies available prior to the World War II period were in 1928-29 at 659.2 million bushels.

The abnormally late season and adverse harvesting weather during much of September, however, will undoubtedly cause some reduction in both yield and quality from earlier expectations. While it is still too early to assess completely the damage caused by frost and snow over wide areas in the Prairies during the last week of September, preliminary reports indicate that yield losses may not be too extensive providing harvesting is resumed shortly. On the other hand, loss in quality through excessive moisture, sprouting and frost has already occurred over wide areas. While frosts came almost a month later than last year, some of the crop, particularly in Alberta, had not sufficiently matured to escape damage. On the whole, frost damage does not appear to be as widespread as in 1950.

Canadian Wheat Supplies

| Item | 1951-52 ^{1/} | 1950-51 |
|---|-----------------------|-------------------|
| | - million bushels - | |
| Carryover in North America at July 31 | 186.4 | 112.2 |
| New Crop | 579.3 ^{2/} | 461.7 |
| Imports of wheat, August | ^{3/} | ^{3/} |
| Total estimated supplies | 765.7 | 573.9 |
| Less estimated domestic requirements for crop year .. | 150.0 | 145.6 |
| Available for export and carryover | 615.7 | 428.3 |
| Deduct: | | |
| Overseas clearances of wheat as grain, August | 16.9 | 12.0 |
| Exports of Canadian wheat to U.S., August | 2.3 | .4 |
| Total exports of wheat | 19.2 | 12.4 |
| Exports of wheat flour in terms of wheat, August | 3.1 | 3.1 ^{4/} |
| Total exports of wheat and wheat flour | 22.3 | 15.5 |
| Balance on September 1 for export and carryover | 593.4 | 412.8 |

^{1/} Preliminary

^{2/} September estimate

^{3/} Less than 50,000 bushels

^{4/} Adjusted for time lag in returns made by Customs

Two consecutive late harvests, coupled with the necessity of handling considerable quantities of off-grade wheat, have added greatly to storage and transportation problems. While the amount of wheat in country elevators at September 13, 1951 was not excessive relative to other years, the storage problem has been complicated by the necessity of segregating a greater than usual number of off-grades, especially from the 1950 crop. On September 13 this year country elevators held 51.7 million bushels of wheat compared with 47.4 million in 1950 and 64.9 million in 1949. Stocks in store in Lakehead terminals on September 13 this year stood at 30.3 million bushels, of which only 3.3 million graded No. 1 to No. 4 Northern, as against 15.2 million and 13.2 million in 1950 and 1949, respectively.

Wheat stocks in eastern forward positions were somewhat greater than a year ago but West Coast stocks were down considerably. Stocks at eastern lake ports, at 17.1 million bushels, were at approximately the same level as in the two preceding years while stocks in St. Lawrence and Atlantic seaboard ports were 9.6 million bushels. Comparable figures for the latter positions for 1950 and 1949 were 11.2 million and 3.7 million bushels, respectively. Stocks in store at Vancouver-New Westminster, however, were only 3.1 million bushels as against 11.8 million a year ago and 5.5 million in 1949. Total commercial supplies in all positions on September 13 this year were 144.7 million bushels, compared with 114.2 million in 1950 and 130.4 million in 1949.

In view of developments during September, data on current crop year supplies will likely be subject to some downward revision when the next estimate of production is released on November 15. On the basis of current forecasts of production and estimated domestic requirements of some 150 million bushels, almost 616 million bushels of wheat would be available for export during 1951-52 and carryover at next July 31. Exports during August 1951 amounted to 22.3 million bushels of which 19.2 million were exported in the form of grain. Comparable figures for August 1950 were 15.5 million and 12.4 million bushels, respectively. The estimated balance remaining on September 1, 1951 for export and carryover was 593.4 million bushels, compared with 412.8 million a year ago.

Following a conference on September 25, a joint press statement was issued by R. W. Milner, Transport Controller, and George McIvor, Chief Commissioner, the Canadian Wheat Board. The release reads, in part, as follows:

"Until the 1951 grain crop starts to move in volume, full use cannot be made of presently available rail transportation and lake tonnage. For some time now rail and lake transportation have been geared to a heavy movement of new crop grain from country elevators to the Lakehead and to seaboard positions, but continued wet weather is still delaying producers' deliveries.

Mr. McIvor pointed out that present stocks of low grade old crop wheat at the Lakehead and in eastern positions were more than sufficient to meet the current demand for wheat of feed grades. He pointed out that to move additional stocks of last year's low grade wheat from country elevators would only result in congesting the Lakehead and eastern positions, and would prevent an adequate flow of milling grades of new crop wheat as soon as they become available. Mr. McIvor stated that the demand for milling wheat is excellent and the Board has very heavy export commitments for the fall months and throughout the crop year..

It was for this reason that the Board instructed the elevator companies to preference the shipment of milling grades and requested the Transport Controller to restrict the movement of low grade wheat to the Lakehead and into eastern positions to avoid the danger of low grade wheat blocking the movement of high grade wheat when the new crop becomes available in volume.

Mr. McIvor stated that he did not wish to infer that last year's low grade wheat is unsaleable. He stated that the Board had made good sales of low grade wheat from the 1950 crop and these grades were still selling in good volume. However, the Board received about 160 million bushels of low grade wheat from the 1950 crop and this quantity of low grade wheat could not be sold within a period of twelve months. Mr. McIvor also pointed out that producers in the Prairie Provinces delivered about 30 million bushels of wheat in July—the last month of the crop year—and most of these deliveries consisted of low grade wheat. Mr. McIvor stated that the Board appreciated the difficulties that were being created at many delivery points in Saskatchewan, but felt that existing stocks of low grade wheat should not interfere with the marketing of the new crop and the meeting of heavy export commitments. Mr. McIvor stated that producers can also assist by giving preference to deliveries of milling grades of wheat; in doing so they will help the Board in meeting export commitments which have been entered into.....

.....Mr. Milner pointed out that since August 1st a total of about 81 million bushels of grain has been shipped out of country elevators. This compared with about 40 million bushels shipped during the corresponding period last year; the movement to date this year being just double last year's movement for the same period.....

Referring to lake transportation generally, Mr. Milner stated that the movement of coal, ore, limestone and pulp has continued without interruption and lake vessels will complete the lifting of these commodities well within their contract dates and will then be available for the grain movement.

Mr. Milner stated that in his opinion the railways have sufficient boxcars available for the grain movement to Vancouver and to the Lakehead, and there is ample vessel tonnage to move grain from the Lakehead to supply winter domestic markets and export shipment from the seaboard. These transportation facilities, however, cannot be used to full extent until more progress is made with the harvesting of the 1951 crop and milling grades become available."

| | |
|------------------------|---|
| <u>Alternative</u> | The Canadian Wheat Board announced on September 25 a change |
| <u>Delivery Points</u> | in its policy regarding delivery quotas under certain conditions. |
| <u>Authorized</u> | The announcement reads, in part, as follows: |

"Effective October 1, 1951, when the wheat delivery quota at a delivery point has been increased to eleven (11) bushels or higher such delivery point shall automatically become an alternative delivery point at which a producer may deliver wheat up to the quota in effect at that point, and without the necessity of obtaining an authorized change in the delivery point designated in his permit book; provided, however, that no producer shall deliver at any point an amount of wheat which, when added to all previous deliveries of wheat applicable to his 1951-52 quota, wherever made, shall be in excess of the amount permitted under the authorized wheat quota at the point at which delivery is contemplated."

Second Estimate of Production of Canada's 1951 Grain Crops

The second estimate of the 1951 production of Canada's principal field crops, issued by the Dominion Bureau of Statistics on September 14, showed little change from the first estimate released on August 15. On the basis of conditions at August 31, record crops were indicated for wheat, mixed grains, soybeans, hay and clover and alfalfa, a near-record crop for barley, and above-average outturns for most other crops.

An important factor conditioning the September estimates for grain crops, however, is the abnormally late season and unfavourable harvesting weather in the Prairie Provinces. Wet weather caused considerable lodging of standing grain and sprouting in both swaths and stooks, and generally interfered with combining and threshing. In addition, September frosts damaged immature crops, particularly in some districts of Alberta. Consequently, some reduction in yield from the September estimates may occur when final harvesting results become known.

September Estimate of the 1951 Production of Principal Grain Crops in Canada,
Compared with 1950

| Crop | Area* | | Yield Per Acre | | Production | |
|--------------------------|------------|------------|----------------|------|-------------|-------------|
| | 1950 | 1951 | 1950 | 1951 | 1950 | 1951 |
| | - acres - | | - bushels - | | - bushels - | |
| <u>CANADA</u> | | | | | | |
| Winter wheat | 928,000 | 911,300 | 32.4 | 27.5 | 30,067,000 | 25,061,000 |
| Spring wheat | 26,093,200 | 24,820,000 | 16.5 | 22.3 | 431,597,000 | 554,277,000 |
| All wheat . | 27,021,200 | 25,731,300 | 17.1 | 22.5 | 461,664,000 | 579,338,000 |
| Oats | 11,575,100 | 12,065,400 | 36.3 | 41.6 | 419,930,000 | 502,114,000 |
| Barley | 6,624,800 | 8,035,900 | 25.9 | 32.0 | 171,393,000 | 257,051,000 |
| Fall rye ... | 830,000 | 770,000 | 11.2 | 16.3 | 9,256,000 | 12,549,000 |
| Spring rye . | 337,900 | 357,000 | 12.1 | 17.6 | 4,077,000 | 6,292,000 |
| All rye ... | 1,167,900 | 1,127,000 | 11.4 | 16.7 | 13,333,000 | 18,841,000 |
| Flaxseed ... | 560,000 | 1,112,200 | 8.4 | 8.9 | 4,686,000 | 9,895,000 |
| <u>PRAIRIE PROVINCES</u> | | | | | | |
| Wheat | 25,836,000 | 24,574,000 | 16.5 | 22.3 | 427,000,000 | 548,000,000 |
| Oats | 7,446,000 | 7,954,000 | 34.1 | 41.2 | 254,000,000 | 328,000,000 |
| Barley | 6,205,000 | 7,612,000 | 25.3 | 31.8 | 157,000,000 | 242,000,000 |
| Rye | 1,062,400 | 1,034,400 | 10.5 | 16.3 | 11,200,000 | 16,910,000 |
| Flaxseed ... | 525,300 | 1,055,000 | 8.2 | 8.6 | 4,300,000 | 9,100,000 |

* Seeded area except for winter wheat and fall rye where estimates are based on acreages remaining for harvest. Includes all revisions to date.

Canada's 1951 wheat crop of 579 million bushels (according to the second estimate), is 118 million bushels greater than the 1950 outturn and about 12 million above the previous record set in 1928. In the Prairie Provinces the wheat crop is expected to amount to 548 million bushels as against 427 million last year and the previous record of 545 million in 1928. Production in Saskatchewan is placed at 329 million bushels while the outturn in Alberta and Manitoba is estimated at 169 million and 50 million, respectively. Relatively small quantities of winter wheat are included with spring wheat in the estimates for the Prairie Provinces. In the remainder of Canada production of wheat is placed at 31.3 million bushels, with Ontario's outturn of 26.1 million (of which 25.1 million is winter wheat) accounting for the greater part.

Farmers' Marketings Deliveries of wheat (both old and new-crop) by farmers in Western Canada from August 1 to September 13 of the current crop year amounted to only 16.4 million bushels, considerably below the amounts normally delivered by mid-September. In 1950-51, 43 million bushels had been delivered by September 14 while for the comparable period in each of 1949-50 and 1948-49 marketings amounted to 107 million bushels. The abnormally late harvest this year prevented new-crop wheat being marketed in volume until the second week in September when 10.5 million bushels (including some old-crop wheat) were delivered by Western Canadian farmers.

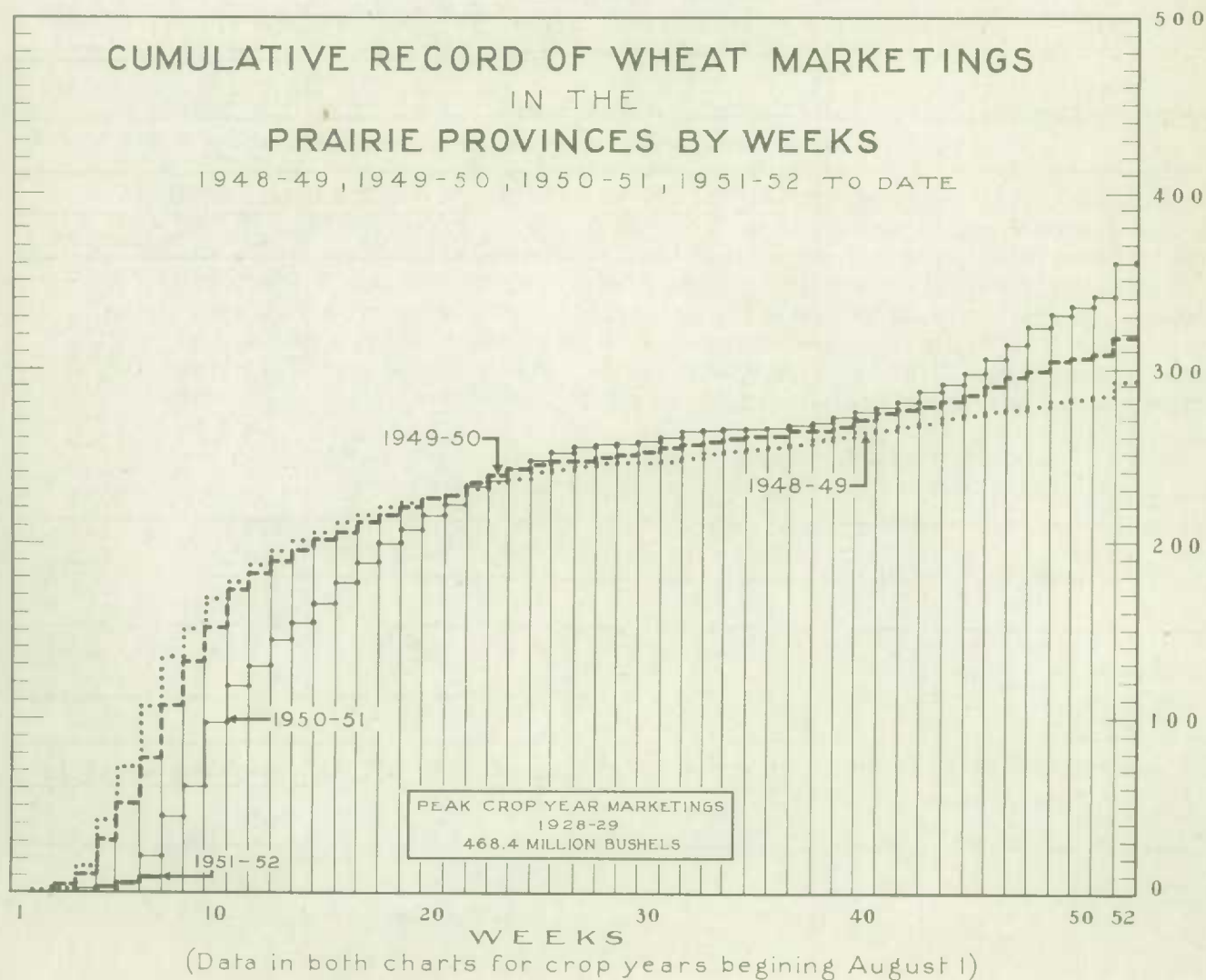
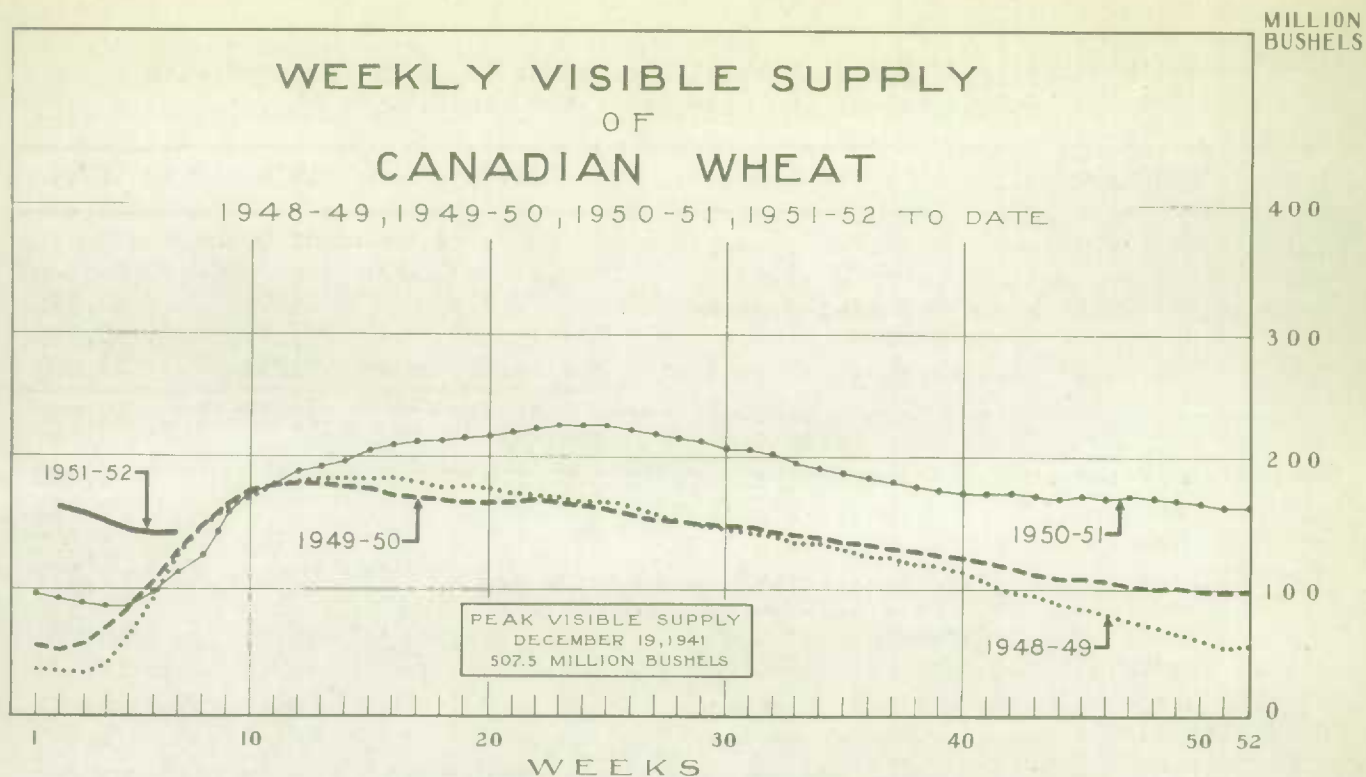
Farmers' Marketings of Wheat in the Prairie Provinces, 1951-52

| 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 | 976,552 | 5,523,470 | 4,038,683 | 10,538,705 | 20,915,650 |
| Totals | 2,122,678 | 8,055,452 | 6,184,679 | 16,362,809 | 43,015,468 |

Delivery Quota Position The Canadian Wheat Board's summary of the number of Western Canadian shipping points in each quota group for wheat as at September 21 indicated that 1,561 points, or approximately 75 per cent of the total, were still on the initial quota of 6 bushels per seeded acre. On a provincial basis, approximately 60 per cent of the points in Alberta and British Columbia were on a 6-bushel quota while the proportion in Manitoba and Saskatchewan was 71 per cent and 84 per cent, respectively. Only 13 points of the total of 2,088 were on a delivery quota exceeding 10 bushels per seeded acre, with only two points, Creston and Wynndel in British Columbia on an open quota basis. The delivery quota position for oats, barley and rye was approximately the same as for wheat in all provinces.

Summary of Elevator Shipping Points in Each Quota Group for Wheat in the Prairie Provinces as at September 21, 1951

| Province | Quota in Bushels Per Seeded Acre | | | | | | Total |
|--------------------------------|----------------------------------|-----|-----|----|----|------|-------|
| | 6 | 8 | 10 | 12 | 15 | Open | |
| Manitoba | 269 | 65 | 44 | 1 | 1 | - | 380 |
| Saskatchewan | 943 | 131 | 53 | - | - | - | 1,127 |
| Alberta and British Columbia . | 349 | 100 | 121 | 6 | 3 | 2 | 581 |
| Totals | 1,561 | 296 | 218 | 7 | 4 | 2 | 2,088 |



Visible Supply of Canadian Wheat, September 13, 1951 Compared with
Approximately the Same Date, 1950 and 1949

| Position | 1951 | 1950 | 1949 |
|---|---------|---------|---------|
| - thousand bushels - | | | |
| Country elevators - Manitoba | 2,776 | 2,309 | 10,574 |
| Saskatchewan | 33,161 | 27,177 | 30,358 |
| Alberta | 15,780 | 17,931 | 23,948 |
| Totals | 51,717 | 47,417 | 64,881 |
| Interior private and mill elevators | 3,458 | 3,545 | 4,090 |
| Interior terminals | 10,236 | 7 | 53 |
| Vancouver-New Westminster | 3,100 | 11,793 | 5,505 |
| Churchill | 1,131 | 1,244 | 1,157 |
| Fort William-Port Arthur | 30,270 | 15,190 | 13,188 |
| In transit rail (Western Division) | 9,170 | 6,129 | 12,750 |
| Eastern elevators lake ports | 17,096 | 16,071 | 17,123 |
| St. Lawrence and seaboard ports | 9,600 | 11,245 | 3,675 |
| In transit lake | 4,249 | 1,333 | 7,205 |
| In transit rail (Eastern Division) | 1,869 | 60 | 377 |
| United States ports | 2,449 | 154 | 356 |
| In transit U.S.A. | 370 | 4 | - |
| Totals | 144,716 | 114,191 | 130,361 |

Grading of Wheat Inspected, August, 1951 and 1950

| Grade | August, 1951 | | | August, 1950 | | |
|------------------------|--------------|--------|----------------------|--------------|-------|----------------------|
| | New Crop | Total | Proportion <u>1/</u> | New Crop | Total | Proportion <u>1/</u> |
| | cars | cars | per cent | cars | cars | per cent |
| 1 Northern ... | 8 | 633 | 3.5 | 2 | 1,614 | 19.8 |
| 2 Northern ... | 74 | 2,270 | 12.7 | 1 | 4,115 | 50.6 |
| 3 Northern ... | 33 | 2,499 | 14.0 | - | 669 | 8.2 |
| 4 Northern ... | 3 | 2,370 | 13.2 | - | 296 | 3.6 |
| 5 Wheat | - | 3,722 | 20.8 | - | 403 | 5.0 |
| 6 Wheat | - | 3,486 | 19.5 | - | 119 | 1.5 |
| Feed Wheat ... | - | 582 | 3.3 | - | 2 | 2/ |
| Garnet | - | 57 | 0.3 | - | 125 | 1.5 |
| Amber Durum .. | 2 | 656 | 3.7 | - | 390 | 4.8 |
| Alberta Winter | 87 | 128 | 0.7 | 65 | 114 | 1.4 |
| Toughs <u>2/</u> | 26 | 1,217 | 6.8 | 1 | 45 | 0.6 |
| Damps <u>2/</u> | - | 9 | 0.1 | 1 | 2 | 2/ |
| All Others ... | - | 258 | 1.4 | - | 238 | 2.9 |
| Totals | 233 | 17,887 | 100.0 | 70 | 8,132 | 100.0 |

1/ Proportion that each grade or group of grades of both old and new crop wheat is of the total inspections.

2/ All varieties and grades.

3/ Less than .05 per cent.

Wheat Shipments to the United States by Destination
August 1 to September 13, 1951
Compared with Approximately the Same Period, 1950 and 1949

| Destination | 1951 | 1950 | 1949 |
|--------------------------------|-----------|-----------|---------|
| | bu. | bu. | bu. |
| <u>By Vessel</u> | | | |
| Buffalo | 2,733,259 | 1,352,140 | 337,853 |
| Oswego | 514,005 | - | - |
| Duluth-Superior | 979,929 | - | - |
| Chicago | 332,807 | - | - |
| Milwaukee | 120,426 | - | - |
| Totals, Vessel Shipments | 4,680,426 | 1,352,140 | 337,853 |
| <u>By Rail</u> | | | |
| U.S.A. Seaboard Ports | - | 20,194 | - |
| Other U.S.A. Points | 472,051 | 10,500 | 17,500 |
| Totals, Rail Shipments | 472,051 | 30,694 | 17,500 |
| Grand Totals | 5,152,477 | 1,382,834 | 355,353 |

Wheat shipments to the United States, either for re-export or retention for domestic use, from the beginning of the current crop year to September 13 amounted to 5.2 million bushels, considerably above the 1.4 million and 0.4 million bushels, respectively, shipped during the corresponding period of the preceding two crop years. Of the 4.7 million bushels shipped by vessel during the current crop year, some 2.7 million bushels went to Buffalo. Duluth-Superior received just under one million bushels, with smaller amounts going to Oswego, Chicago and Milwaukee. Rail shipments, at 0.5 million bushels, were also up sharply from the levels of the corresponding period in 1950 and 1949.

Rail Shipments of Wheat to Maritime Ports from Bay Ports

| Ports | August 1 to September 13, 1951 | August 1 to September 14, 1950 |
|---------------------|-----------------------------------|-----------------------------------|
| | - bushels - | |
| Midland | 1,273,247 | - |
| Port McNicoll | 19,200 | - |
| Totals | 1,292,447 | - |

Rail shipments to Maritime ports from Bay ports, normally moving in large volume only during the close of the navigation season, totalled 1.3 million bushels from the first of the current crop year to September 13. Last year for the comparable period no rail shipments of wheat were made to the Maritimes from Bay ports. With the exception of 19,200 bushels shipped from Port McNicoll, all of the current crop year shipments originated at Midland.

Lake Shipments of Canadian Grain from the Opening of Navigation to September 13, 1951
and to Approximately the same Date, 1941 to 1950

| Year | Wheat | Oats | Barley | Rye | Flaxseed | Totals |
|----------------------|---------|--------|--------|-------|----------|---------|
| - thousand bushels - | | | | | | |
| 1941 | 155,244 | 6,069 | 5,650 | 4,209 | 837 | 172,010 |
| 1942 | 117,338 | 1,960 | 1,927 | 740 | 499 | 122,465 |
| 1943 | 125,928 | 27,725 | 30,029 | 1,286 | 2,802 | 187,772 |
| 1944 | 193,637 | 48,433 | 27,613 | 5,710 | 4,514 | 279,908 |
| 1945 | 227,375 | 57,693 | 24,512 | 3,366 | 2,450 | 315,397 |
| 1946 | 61,347 | 37,079 | 13,364 | 1,048 | 1,004 | 113,842 |
| 1947 | 91,115 | 26,976 | 13,319 | 2,169 | 28 | 133,606 |
| 1948 | 60,873 | 12,941 | 12,555 | 1,204 | 4,305 | 91,877 |
| 1949 | 95,481 | 17,863 | 17,526 | 5,894 | 4,767 | 141,531 |
| 1950 | 84,639 | 12,922 | 13,673 | 3,357 | 1,496 | 116,088 |
| 1951 | 108,632 | 39,614 | 28,196 | 4,849 | 959 | 182,251 |

Lake shipments of the five major grains from Fort William—Port Arthur from the beginning of navigation to September 13 amounted to 182.3 million bushels, the largest of any comparable period since 1945. Shipments of wheat, at 108.6 million bushels, were 24 million greater than last year while shipments of oats, at 39.6 million bushels, were more than three times as great as last year's total of 12.9 million. Barley shipments, totalling 28.2 million bushels, were more than double last year's level of 13.7 million. Shipments of rye, at 4.8 million bushels, were also above those of last year, but flaxseed shipments at 959,000 bushels were down from the 1950 total of 1.5 million bushels for the comparable period.

Alternative Delivery Points Authorized
(continued from Page 7)

"Under the above policy the only grain that can be delivered to an alternative delivery point by a producer who is not registered there is Wheat and then only when the Wheat quota at such point is eleven bushels or higher. Delivery of Oats, Barley and Rye must still be confined to the designated point shown in the producer's permit book.

If the wheat delivery quota at the delivery point designated in a producer's permit book is less than eleven bushels per acre but the producer can locate space at some other delivery point where the wheat quota is eleven bushels or higher, the producer, under the above policy, may deliver wheat to the station with the eleven bushel or higher quota, but his deliveries, including his deliveries to his own designated point, if any, may not exceed the quota in effect at the new alternative delivery point. The producer still maintains the privilege of delivering to his own delivery point but if he has delivered any wheat to an alternative point such deliveries must be taken into consideration in determining the remaining deliveries eligible at his designated point. If his aggregate deliveries are up to, or exceed, the quota in effect at his designated point, no further wheat deliveries are permissible at that point until such time as the quota has been raised sufficiently to allow further deliveries.

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 | | 123,256 | 131,711 | 30,017 |
| October | | 73,543 | 122,482 | 46,274 |
| November | | 133,847 | 92,334 | 138,600 |
| December | | 1,517,624 | 342,946 | 1,740,405 |
| January | | 4,394,047 | 277,502 | 3,794,391 |
| February | | 3,303,248 | 240,087 | 3,720,733 |
| March | | 3,476,161 | 423,774 | 1,511,072 |
| April | | 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 usual pattern, rail shipments of wheat from the Lakehead are at a relatively low level during the lake navigation season. However, this year's August shipments, at about 284,000 bushels, were more than double the August 1950 totals. Distribution of the August 1951 shipments by grade and destination are shown in the accompanying table.

Distribution of Rail Shipments of Wheat from Fort William-Port Arthur, August 1951

| Grade | P.E.I. | N.S. | N.B. | Que. | Ont. | U.S.A. |
|----------------------|--------|-------|-------|---------|---------|--------|
| - bushels - | | | | | | |
| 1/ Northern | - | - | - | - | - | - |
| 2 Northern | - | - | - | 19,000 | 4,500 | - |
| 3 Northern | - | - | - | 27,500 | 29,000 | - |
| 4 Northern | - | - | - | 3,000 | 15,000 | - |
| 5 Wheat | - | - | - | 7,500 | - | - |
| 6 Wheat | - | 667 | 83 | 51,608 | 4,917 | 6,000 |
| Feed Wheat | - | - | - | 4,333 | 1,333 | - |
| Garnet | - | - | - | - | - | - |
| Amber Durum | 1,500 | 1,438 | - | 20,968 | 33,801 | - |
| Alberta Winter | - | - | - | - | 9,939 | - |
| Toughs 1/ | - | - | - | 1,500 | 1,000 | - |
| Damps 1/ | - | - | - | - | - | - |
| All Others | 83 | 3,000 | 3,364 | 12,983 | 19,897 | - |
| Totals | 1,583 | 5,105 | 3,447 | 148,392 | 119,387 | 6,000 |

1/ All varieties and grades.

Freight Assistance Shipments Movement of feed wheat under the freight assistance plan from the Prairie Provinces to Eastern Canada and British Columbia during 1950-51 was up sharply from the 1949-50 level. Shipments during 1950-51, based on claims filed to August 31, amounted to 13.1 million bushels as against 8.7 million in 1949-50. Preliminary data indicate that all provinces except British Columbia received larger freight-assisted wheat shipments in 1950-51 than in 1949-50. Quebec and Ontario received the largest shares in both crop years, accounting for 5.0 million and 4.6 million bushels, respectively, during 1950-51.

Provincial Distribution of Freight-Assisted Wheat Shipments,
1950-51 and 1949-50

| Month | Nfld. | P.E.I. | N.S. | N.B. | Que. | Ont. | B.C. | Total |
|------------------------------|-----------|------------|------------|------------|--------------|--------------|--------------|---------------|
| - thousand bushels - | | | | | | | | |
| August, 1950 .. | 4 | 31 | 60 | 37 | 564 | 476 | 261 | 1,432 |
| September | 4 | 24 | 78 | 48 | 575 | 380 | 200 | 1,309 |
| October | 5 | 6 | 43 | 26 | 378 | 292 | 208 | 958 |
| November | 5 | 12 | 60 | 37 | 472 | 439 | 187 | 1,211 |
| December | 2 | 14 | 62 | 36 | 478 | 362 | 187 | 1,142 |
| January, 1951 . | 3 | 18 | 67 | 41 | 473 | 391 | 232 | 1,226 |
| February | 2 | 16 | 45 | 34 | 342 | 341 | 142 | 922 |
| March | 3 | 29 | 60 | 42 | 374 | 406 | 182 | 1,097 |
| April | 2 | 14 | 46 | 38 | 300 | 387 | 179 | 967 |
| May | 4 | 14 | 62 | 33 | 324 | 404 | 157 | 997 |
| June | 2 | 24 | 55 | 35 | 358 | 376 | 133 | 984 |
| July | 1/ | 25 | 46 | 26 | 407 | 367 | 8 | 879 |
| Totals | 36 | 229 | 684 | 433 | 5,044 | 4,623 | 2,075 | 13,124 |
| Same Period 1949-50 | 14 | 136 | 287 | 212 | 3,079 | 2,822 | 2,169 | 8,719 |

1/ Less than 500 bushels.

Claims filed for payment under the freight assistance plan up to August 31 represent shipments of 550,017 tons of millfeeds during 1950-51 as against 588,244 tons in 1949-50. Preliminary returns show that all provinces except Newfoundland shared in the decrease from the preceding crop year but it should be noted that 1950-51 totals, for both wheat and millfeeds, are subject to upward revision with the filing of additional claims.

Provincial Distribution of Freight-Assisted Millfeed Shipments,
1950-51 and 1949-50

| Province | August 1, 1950 to July 31, 1951 | August 1, 1949 to July 31, 1950 |
|----------------------------|------------------------------------|------------------------------------|
| - tons - | | |
| Newfoundland | 2,810 | 2,229 |
| Prince Edward Island | 9,872 | 11,012 |
| Nova Scotia | 41,210 | 43,856 |
| New Brunswick | 34,753 | 36,853 |
| Quebec | 259,736 | 260,584 |
| Ontario | 160,470 | 187,051 |
| British Columbia | 41,166 | 46,659 |
| Totals | 550,017 | 588,244 |

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

| Year and Month | Overseas Clearances of Canadian Wheat | U. S. Imports of Canadian Wheat for Domestic Use and Grinding in Bond ^{1/} | Customs Exports of Canadian Wheat Flour ^{2/} | Total | Customs Exports of Canadian Wheat and Wheat Flour ^{3/} |
|------------------------------|---------------------------------------|---|---|---------|---|
| - thousand bushels - | | | | | |
| <u>1949-50</u> | | | | | |
| August | 16,639 | 62 | 3,898 | 20,599 | 24,013 |
| September | 14,947 | 881 | 3,771 | 19,599 | 18,294 |
| October | 18,420 | 1,675 | 3,240 | 23,335 | 21,903 |
| November | 20,680 | 2,020 | 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 |
| <u>1950-51</u> ^{4/} | | | | | |
| August | 11,956 | 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 | 14,336 | 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 | 4,382 | 29,882 | 25,968 |
| July | 25,662 | 2,062 | 5,356 | 33,080 | 33,097 |
| Totals | 164,736 | 20,303 | 56,683 | 241,722 | 236,624 |
| <u>1951-52</u> ^{4/} | | | | | |
| August | 16,921 | 2,240 | 3,141 | 22,302 | 27,182 |

^{1/} U.S.A. official figures for imports of wheat for domestic use 1949-50. From August 1949 to date imports for grinding in bond, and from August 1950 to date imports for domestic use compiled from returns of Canadian elevator licensees and advice from American grain correspondents.

^{2/} Exports for crop year 1949-50 and August, 1950 to May 1951 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 International Trade Division, D.B.S.

^{4/} Subject to revision.

Exports of Canadian Wheat and Wheat Flour

August, 1951

| Destination | Wheat Flour ^{1/} | Wheat ^{2/} |
|-------------------------------|---------------------------|---------------------|
| - bushels - | | |
| <u>COMMONWEALTH COUNTRIES</u> | | |
| United Kingdom | 241,290 | 9,607,520 |
| <u>Africa</u> | | |
| Union of South Africa | - | 416,080 |
| <u>British West Africa</u> | | |
| Gold Coast | 7,308 | - |
| Nigeria | 1,687 | - |
| Sierra Leone | 5,283 | - |
| <u>Asia</u> | | |
| British Malaya | 2,295 | - |
| Ceylon | 77,216 | - |
| Hong Kong | 102,074 | - |
| <u>Europe</u> | | |
| Gibraltar | 10,147 | - |
| Malta | - | 26,135 |
| <u>North America</u> | | |
| Bahamas | 23,751 | - |
| Barbados | 48,758 | 775 |
| Bermuda | 9,783 | - |
| British Honduras | 4,972 | - |
| Jamaica | 191,241 | - |
| Leeward-Windward Is. | 67,874 | - |
| Trinidad and Tobago | 150,358 | - |
| <u>South America</u> | | |
| British Guiana | 67,716 | - |
| <hr/> | | |
| Totals | | |
| Commonwealth Countries .. | 1,011,753 | 10,050,510 |

Exports of Canadian Wheat and Wheat Flour
August, 1951

| Destination | Wheat Flour <u>1/</u> | Wheat <u>2/</u> |
|--------------------------|-----------------------|-----------------|
| - bushels - | | |
| <u>FOREIGN COUNTRIES</u> | | |
| <u>Africa</u> | | |
| Belgian Congo | 26,082 | |
| Egypt | - | 54,415 |
| Morocco | 61,232 | - |
| Portuguese Africa | 3,375 | - |
| Tripoli | - | 195,800 |
| <u>Asia</u> | | |
| Indonesia | 3,442 | - |
| Japan | 1,125 | 960,187 |
| Philippine Islands | 46,314 | - |
| Portuguese Asia | 4,590 | - |
| Siam | 7,690 | - |
| Syria | 38,106 | - |
| <u>Europe</u> | | |
| Belgium | - | 446,360 |
| Germany | 80,424 | - |
| Ireland | - | 1,259,400 |
| Italy | 485,609 | 1,111,677 |
| Netherlands | - | 397,179 |
| Norway | 6,075 | 364,000 |
| Sweden | - | 369,600 |
| Switzerland | - | 1,695,211 |
| Yugoslavia | 1,377 | - |
| <u>North America</u> | | |
| Costa Rica | 69,449 | 16,667 |
| Cuba | 391,302 | - |
| Dominican Republic | 12,618 | - |
| El Salvador | 11,704 | - |
| French West Indies | 171 | - |
| Guatemala | 31,810 | - |
| Haiti | 50,895 | - |
| Honduras | 230 | - |

Exports of Canadian Wheat and Wheat Flour
August, 1951

| Destination | Wheat Flour ^{1/} | Wheat ^{2/} |
|--------------------------------------|---------------------------|---------------------|
| - bushels - | | |
| <u>FOREIGN COUNTRIES</u> | | |
| <u>North America</u> | | |
| Netherlands Antilles | 14,850 | - |
| Nicaragua | 10,503 | - |
| Panama | 18,198 | - |
| St. Pierre-Miquelon | 1,606 | - |
| United States | | |
| Flour in terms of wheat | 152,352 | - |
| For domestic use ^{3/} | - | 2,240,001 |
| Virgin Islands | 4,221 | - |
| <u>South America</u> | | |
| Colombia | 15,386 | - |
| Ecuador | 29,498 | - |
| Surinam | 7,906 | - |
| Venezuela | 541,476 | - |
| Totals, Foreign Countries | 2,129,616 | 9,110,497 |
| Grand Totals | 3,141,369 | 19,161,007 |

- ^{1/} 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.
- ^{2/} Overseas clearances as reported by the Statistics Branch of the Board of Grain Commissioners, for all countries except the United States. Subject to revision.
- ^{3/} Compiled from returns of Canadian elevator licensees and advice from American grain correspondents.

Initial Payment to Producers The Canadian Wheat Board announced on September 12 its fixed minimum carlot prices for wheat, established in accordance with the provisions of the Canadian Wheat Board Act, 1935, as amended. The price of No. 1 Northern Wheat was fixed by the provisions of Order in Council P.C. 3906 dated July 31, 1951, and prices of remaining grades have been fixed by the Board in relation to the price of No. 1 Northern.

Canadian Wheat Board Price List for Wheat, 1951-52,
(In Carload Lots, Basis in Store Fort William-Port Arthur or Vancouver)

| Grade | Straight | Tough ^{1/} | Rejected Sprouted ^{2/} | Damp ^{3/} |
|------------------------------------|----------|---------------------|---------------------------------|--------------------|
| No. 1 Hard | \$1.40 | \$1.36 | - | - |
| No. 1 Northern | 1.40 | 1.36 | \$1.30 | \$1.24 |
| No. 2 Northern | 1.37 | 1.33 | 1.27 | 1.21 |
| No. 3 Northern | 1.34 | 1.30 | 1.24 | 1.18 |
| No. 4 Northern | 1.26 | 1.22 | 1.16 | 1.10 |
| No. 5 Wheat | 1.16 | 1.12 | 1.07 | 1.00 |
| No. 6 Wheat | 1.06 | 1.02 | 1.01 | .92 |
| Feed Wheat | 1.00 | .96 | .95 | .86 |
| No. 4 Special | 1.26 | 1.22 | 1.16 | 1.10 |
| No. 5 Special | 1.16 | 1.12 | 1.07 | 1.00 |
| No. 6 Special | 1.06 | 1.02 | 1.01 | .92 |
| No. 1 C.W. Amber Durum | 1.40 | 1.36 | 1.30 | 1.24 |
| No. 2 C.W. Amber Durum | 1.37 | 1.33 | 1.27 | 1.21 |
| No. 3 C.W. Amber Durum | 1.30 | 1.26 | 1.20 | 1.14 |
| No. 4 C.W. Amber Durum | 1.26 | 1.22 | 1.16 | 1.10 |
| No. 5 C.W. Amber Durum | 1.16 | 1.12 | 1.07 | 1.00 |
| No. 6 C.W. Amber Durum | 1.06 | 1.02 | 1.01 | .92 |
| No. 1 C.W. Garnet | 1.34 | 1.30 | 1.24 | 1.18 |
| No. 2 C.W. Garnet | 1.31 | 1.27 | 1.21 | 1.15 |
| No. 3 C.W. Garnet | 1.28 | 1.24 | 1.18 | 1.12 |
| No. 1 Alberta Red Winter | 1.37 | 1.33 | 1.27 | 1.21 |
| No. 2 Alberta Winter | 1.34 | 1.30 | 1.24 | 1.18 |
| No. 3 Alberta Winter | 1.30 | 1.26 | 1.20 | 1.14 |
| No. 4 Alberta Winter | 1.26 | 1.22 | 1.16 | 1.10 |
| No. 1 C.W. Soft White Spring | 1.35 | 1.31 | 1.25 | 1.19 |
| No. 2 C.W. Soft White Spring | 1.32 | 1.28 | 1.22 | 1.16 |
| No. 3 C.W. Soft White Spring | 1.28 | 1.24 | 1.18 | 1.12 |
| No. 4 C.W. Soft White Spring | 1.25 | 1.21 | 1.15 | 1.09 |
| No. 1 Mixed Wheat | 1.16 | 1.12 | 1.09 | 1.02 |
| No. 2 Mixed Wheat | 1.11 | 1.07 | 1.04 | .97 |
| No. 3 Mixed Wheat | 1.09 | 1.05 | 1.02 | .95 |
| No. 4 Mixed Wheat | 1.06 | 1.02 | .99 | .92 |
| No. 5 Mixed Wheat | 1.16 | 1.12 | 1.09 | 1.02 |
| No. 6 Mixed Wheat | 1.11 | 1.07 | 1.04 | .97 |
| No. 1 C.W. Mixed Grain | .95 | .91 | .88 | .81 |

^{1/} Moisture content for wheat other than durum, 14.6 per cent to 17 per cent inclusive; for durum wheat, 14.9 per cent to 17 per cent inclusive.

^{2/} Maximum proportion of sprouts allowed in principal grades: No. 1 Northern, none; No. 2 Northern, 1 1/2 per cent; No. 3 Northern, 5 per cent; No. 4 Northern and No. 5, 8 per cent; No. 6, 12 per cent.

^{3/} Moisture content over 17 per cent.

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

| Class and Grade | Week ending | | | |
|--|-------------|---------|----------|----------|
| | Sept. 1 | Sept. 8 | Sept. 15 | Sept. 22 |
| - cents and eighths per bushel - | | | | |
| <u>Initial Payment to Producers 1951-52 Pool</u> | | | | |
| 1 Hard | 140 | 140 | 140 | 140 |
| 1 Northern | 140 | 140 | 140 | 140 |
| 2 Northern | 137 | 137 | 137 | 137 |
| 3 Northern | 134 | 134 | 134 | 134 |
| 4 Northern | 126 | 126 | 126 | 126 |
| 5 Wheat | 116 | 116 | 116 | 116 |
| 6 Wheat | 106 | 106 | 106 | 106 |
| Feed Wheat | 100 | 100 | 100 | 100 |
| <u>Domestic and Export ^{1/}</u> | | | | |
| <u>(International Wheat Agreement)</u> | | | | |
| 1 Hard | 190/4 | 190/1 | 190/1 | 190 |
| 1 Northern | 190/4 | 190/1 | 190/1 | 190 |
| 2 Northern | 188/4 | 188/1 | 188/1 | 188 |
| 3 Northern | 186/4 | 186/1 | 186/1 | 186 |
| 4 Northern | 182/4 | 180/6 | 179/7 | 178/2 |
| 5 Wheat | 178/4 | 170/6 | 168/1 | 167/5 |
| 6 Wheat | 155/4 | 155/1 | 155/1 | 155 |
| Feed Wheat | 147/4 | 147/1 | 147/1 | 147 |
| 1 C.W. Garnet | 187/4 | 187/1 | 187/1 | 187 |
| 2 C.W. Garnet | 186/4 | 186/1 | 186/1 | 186 |
| 3 C.W. Garnet | 182/4 | 182/1 | 182/1 | 182 |
| 1 Alberta Red Winter | 190/4 | 190/1 | 190/1 | 190 |
| 2 Alberta Winter | 188/4 | 188/1 | 188/1 | 188 |
| 3 Alberta Winter | 183/4 | 183/1 | 183/1 | 183 |
| 1 C.W. Amber Durum | 190/4 | 190/1 | 190/1 | 190 |
| 2 C.W. Amber Durum | 188/4 | 188/1 | 188/1 | 188 |
| 3 C.W. Amber Durum | 186/4 | 186/1 | 186/1 | 186 |
| <u>Export - Class II</u> | | | | |
| 1 Hard | 236/4 | 239/6 | 240/1 | 240 |
| 1 Northern | 236/4 | 239/6 | 240/1 | 240 |
| 2 Northern | 234/4 | 237/6 | 238/1 | 238 |
| 3 Northern | 232/4 | 235/6 | 236/1 | 236 |
| 4 Northern | 228/4 | 230/3 | 229/7 | 228/2 |
| 5 Wheat | 184/4 | 176/6 | 174/1 | 173/5 |
| 6 Wheat | 161/4 | 161/1 | 161/1 | 161 |
| Feed Wheat | 153/4 | 153/1 | 153/1 | 153 |
| 1 C.W. Amber Durum | 236/4 | 239/6 | 240/1 | 240 |
| 2 C.W. Amber Durum | 234/4 | 237/6 | 238/1 | 238 |
| 3 C.W. Amber Durum | 232/4 | 235/6 | 236/1 | 236 |

^{1/} Plus 6 cents carrying charge.

CANADIAN FLOUR MILLING SITUATION

Production Wheat flour production reported by Canadian mills for August 1951 amounted to 1.7 million barrels, practically unchanged from the same month a year ago, but well above the July 1951 output of 1.4 million barrels. Mills reporting operations during August this year had a rated capacity of 97,789 barrels and, on the basis of a 27-day working period, 64.4 per cent of this capacity was effective. Mill grindings during the month totalled 7.7 million bushels of wheat, compared with 7.6 million in August last year and 6.4 million in July 1951.

Exports Exports of Canadian flour during August, according to preliminary Customs returns, amounted to 698,082 barrels (3.1 million bushels of wheat equivalent). The largest shipments to an individual country, amounting to 541,476 bushels of wheat equivalent, went to Venezuela, with the next largest, 485,609 bushels of wheat equivalent, going to Italy. Other relatively large shipments, in bushels of wheat equivalent, went to Cuba (391,302), the United Kingdom (241,290) and Jamaica (191,241). Altogether, shipments of Canadian wheat flour went to almost 50 countries and colonies during August 1951.

Production and Exports of Wheat Flour, Canada,
1935-36--1939-40 average, and 1940-41 to 1951-52

| Crop Year | Production | Exports ^{1/} |
|--------------------------------|---------------------------|-----------------------|
| | - barrels of 196 pounds - | |
| 1935-36--1939-40 average | 15,002,781 | 4,899,970 |
| 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 | 20,379,997 | 10,687,561 |
| 1949-50 | 20,259,200 | 10,151,090 |
| 1950-51 | 23,620,600 ^{2/} | 12,596,200 |
| <u>1951-52</u> | | |
| August | 1,699,569 ^{2/} | 698,082 |
| August 1950 (Revised) | 1,704,967 | 680,010 |

^{1/} Based on Customs returns. Exports for the crop years 1945-46 to 1949-50, and August, 1950 to May, 1951 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 A small downward revision in the September 1 estimate of the 1951 wheat crop has reduced total estimated domestic supplies of United States wheat for the current crop year to 1,394.1 million bushels, about 60 million less than in 1950-51. Domestic supplies during 1950-51, however, were supplemented by imports of about 12 million bushels of Canadian feed wheat, and United States officials have indicated that current crop-year supplies will also likely be bolstered by sizable imports of feeding quality wheat.

Exports of wheat as grain during the first two months of the current crop year totalled 68.3 million bushels, more than double the 27.2 million exported during the same period in 1950-51. Exports of wheat flour and macaroni in terms of wheat, on the other hand, were down from 7.1 million bushels to 5.4 million for the July-August period this year. Combined exports of wheat and wheat flour for July and August this year amounted to 73.7 million bushels, compared with 34.3 million in the same two months last year. The balance remaining for export and carryover on September 1, 1951 was estimated at 576.7 million bushels as against 714.2 million a year ago.

United States Wheat Supplies

| Item | 1951-52 ^{1/} | 1950-51 |
|---|-----------------------|---------|
| | - million bushels - | |
| Carryover at July 1 | 395.0 | 426.8 |
| New crop | 999.1 ^{2/} | 1,026.8 |
| Total estimated domestic supplies | 1,394.1 | 1,453.6 |
| Imports of wheat for domestic use, July-August | 4.3 | 0.1 |
| Total estimated supplies ^{3/} | 1,398.4 | 1,453.7 |
| Less estimated domestic requirements for crop year ^{4/} | 748.0 | 705.2 |
| Available for export and carryover | 650.4 | 748.5 |
| Deduct: | | |
| Exports of wheat as grain, July-August | 68.3 | 27.2 |
| Exports of wheat flour and macaroni in terms of wheat, July-August | 5.4 | 7.1 |
| Total exports of wheat, wheat flour and macaroni | 73.7 | 34.3 |
| Balance on September 1 for export and carryover | 576.7 | 714.2 |

^{1/} Preliminary.

^{2/} Official estimate as of September 1, 1951.

^{3/} Excluding imports for September-June period.

^{4/} Includes allowances for shipments of United States wheat and wheat products to Alaska, Hawaii, Puerto Rico, Guam, Samoa, Virgin Islands and Wake Island. These shipments are not included in exports as set out in the table.

1951 Wheat Crop Estimated
at 999 Million Bushels

The Bureau of Agricultural Economics, in its monthly crop report released on September 11, estimated the 1951 wheat crop at 999 million bushels, a minor increase from the August 1 forecast. Current production compares with a 1,027 million bushel crop harvested last year and the 1940-1949 average of 1,071 million bushels. The prospective all wheat production for 1951 includes 651 million bushels of winter wheat for which the last estimate was made as of August 1.

All spring wheat production is forecast at 348 million bushels, slightly above August 1 prospects. The current crop is 26 per cent larger than the 276 million bushel crop produced last year and one-fourth larger than the 10-year average. The crop is turning out better than expected earlier from Montana westward but yields are lower in South Dakota and Nebraska and some States to the east. Cool, wet weather associated with overcast skies prevailed over much of the latter area during the last part of August, virtually stopping harvest operations the first of September and retarding ripening of late seeded crops. The indicated yield of 16.1 bushels per acre is slightly higher than the 1950 yield of 15.4 bushels and the average of 15.7 bushels.

Durum wheat production forecast of 36,536,000 bushels is virtually unchanged from the August 1 forecast. The slightly lower prospect is due to a lower yield indicated in South Dakota. Prospective Durum production slightly exceeds the 1950 crop of 36,064,000 bushels but is nearly a million bushels below the average production. The yield is indicated at 13.9, slightly lower than last month's forecast. This yield exceeds the 13.2 bushel yield of a year ago but is below the average of 14.8 bushels.

Other spring wheat production is forecast at 311,875,000 bushels, slightly more than a million bushels over that forecast a month ago. This would be more than a fourth larger than the 240 million bushel crop produced last year and the average of 242 million bushels. The indicated yield of 16.4 bushels per acre is 0.6 and 0.5 bushel, respectively, above last year and average.

Wheat Price Support Extended
to Lower Grades

The U. S. Department of Agriculture announced on September 13 that because of widespread weather damage to wheat in the field the 1951-crop price support program has been extended to cover No. 4, No. 5 and sample grade wheat. However, the wheat must be storable, and it must not be sour, musty, heating, or hot. Sample grade wheat must not contain more than 14 per cent moisture.

Support rates for No. 4 and No. 5 will be discounted from No. 3 grade rate, 1 cent for each 1 per cent total damage above 7 per cent. Sample grade wheat (below grade 5) will be discounted 80 cents per bushel under the support rate for No. 1 wheat.

Heretofore, support has been limited to wheat grading No. 3 or better, or grading No. 4 or No. 5 on the factor of "test weight" only, which under normal circumstances is adequate to assure price support to wheat producers. The program revision will make it possible for farmers to hold damaged wheat, resulting from this year's abnormal weather, under loan or purchase agreement until it can be marketed in an orderly manner.

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 |
| August 27, 1951 | 234 - 239 1/2 | August 27, 1951 | 232 3/8 - 234 3/8 |
| 28 | 232 3/4 - 243 3/4 | 28 | 231 7/8 - 235 7/8 |
| 29 | 231 - 234 | 29 | 222 1/2 - 232 1/2 |
| 30 | 230 1/2 - 235 1/4 | 30 | 228 1/8 - 231 1/8 |
| 31 | 232 3/4 - 247 3/4 | 31 | 230 1/4 - 234 1/4 |
| September 1 | Market Closed | September 1 | 232 1/2 - 236 1/2 |
| 3 | Labour Day | 3 | Labour Day |
| 4 | 234 - 239 1/2 | 4 | 231 5/8 - 235 5/8 |
| 5 | 227 1/4 - 240 1/2 | 5 | 232 1/8 - 236 1/8 |
| 6 | 235 - 238 3/4 | 6 | 234 1/2 - 238 1/2 |
| 7 | 235 1/4 - 239 1/4 | 7 | 235 5/8 - 240 5/8 |
| 8 | 237 - 239 3/4 | 8 | 235 3/8 - 240 3/8 |
| 10 | 238 1/2 - 240 | 10 | 233 3/4 - 238 3/4 |
| 11 | 238 1/4 - 247 1/2 | 11 | 231 3/4 - 236 3/4 |
| 12 | 248 | 12 | 233 1/8 - 238 1/8 |
| 13 | 238 1/2 - 239 | 13 | 232 - 236 |
| 14 | 239 1/4 - 241 | 14 | 230 3/8 - 235 3/8 |
| 15 | 238 - 241 | 15 | 230 1/4 - 235 1/4 |
| 17 | 238 1/2 - 245 | 17 | 228 1/4 - 232 1/4 |
| 18 | 234 1/2 - 246 | 18 | 227 1/4 - 232 1/4 |
| 19 | 236 1/4 - 237 3/4 | 19 | 228 1/4 - 233 1/4 |
| 20 | 238 3/4 - 246 3/4 | 20 | 229 5/8 - 234 5/8 |
| 21 | 238 - 239 1/2 | 21 | 228 7/8 - 232 7/8 |
| 22 | 238 1/4 - 239 1/2 | 22 | 228 1/2 - 232 1/2 |

Chicago Wheat Futures, High Points of Closing

| Date | September | December | March | May | July |
|----------------------------------|-----------|----------|--------|--------|-------|
| - cents and eighths per bushel - | | | | | |
| August 27, 1951 | 240/5 | 244/3 | 246/6 | 245/4 | 238/6 |
| 28 | 240/2 | 244/4 | 247 | 246/4 | 240/3 |
| 29 | 238/7 | 243/1 | 246 | 245/3 | 239 |
| 30 | 233/6 | 242/7 | 245/3 | 244/4 | 238/1 |
| 31 | 239/4 | 244/3 | 247/2 | 246/5 | 240/6 |
| September 1 | | | Market | Closed | |
| 3 | | | Labour | Day | |
| 4 | 240/5 | 245/1 | 247/5 | 246/6 | 240/6 |
| 5 | 240/7 | 244/7 | 247 | 246/4 | 240/3 |
| 6 | 242/2 | 245/5 | 248/1 | 247/6 | 241/7 |
| 7 | 242/7 | 246/2 | 248/4 | 248/1 | 241/5 |
| 8 | 243/6 | 247/2 | 249/4 | 249/1 | 242/4 |
| 10 | 242/2 | 246 | 248/4 | 248 | 241/2 |
| 11 | 242/2 | 246/1 | 249/2 | 248/7 | 242/1 |
| 12 | 241/4 | 246/3 | 249/3 | 248/7 | 242/2 |
| 13 | 241 | 244/7 | 247/7 | 247/4 | 241/1 |
| 14 | 241/1 | 245 | 248 | 247/4 | 240 |
| 15 | 242/1 | 245/7 | 248/7 | 248/4 | 241 |
| 17 | 241 | 244/7 | 248/2 | 247/7 | 241/1 |
| 18 | 239/5 | 243/5 | 246/7 | 246/6 | 240/4 |
| 19 | 240 | 244 | 247/4 | 247/3 | 241/6 |
| 20 | 241 | 245/1 | 248/3 | 248 | 241/6 |
| 21 | 241/6 | 245 | 248/4 | 248 | 242/2 |
| 22 | | 245/1 | 248/5 | 248/2 | 242/2 |
| 24 | | 244/6 | 248/4 | 248/3 | 242/7 |

ARGENTINE SITUATION

Supply Position Revisions in estimated domestic requirements for both 1949-50 and 1950-51, based largely on trade information, indicate that supplies of Argentine wheat available for export and carryover during the current crop year amounted to an estimated 97 million bushels as against 112 million in 1949-50. Despite this year's smaller exportable supplies, exports of wheat and wheat flour for the nine months ending August 31 amounted to 82 million bushels, almost as large as for the corresponding period of 1949-50. Brazil, India, and Italy have been the main outlets for Argentine wheat during 1950-51. On the basis of the revised supply position, the balance remaining for export and carryover on September 1, 1951, was estimated at 15 million bushels, compared with 29 million on the same date last year.

Argentine Wheat Supplies

| Item | 1950-51 ^{1/} | 1949-50 |
|---|-----------------------|-------------------|
| | - million bushels - | |
| Carryover at beginning of crop year (December 1) | 15 ^{2/} | 44 |
| New crop | 202 ^{2/} | 189 |
| Total estimated supplies | 217 | 233 |
| Less estimated domestic requirements for crop year | 120 ^{3/} | 121 ^{3/} |
| Available for export and carryover | 97 ^{3/} | 112 ^{3/} |
| Deduct: | | |
| Exports of wheat as grain, December 1—August 31 | 81 | 83 |
| Exports of wheat flour in terms of wheat, December 1—August 31 | 1 | 4 ^{4/} |
| Total exports of wheat and wheat flour | 82 | 83 |
| Balance on September 1 for export and carryover | 15 | 29 |

^{1/} Preliminary.

^{2/} Official estimate.

^{3/} Revised.

^{4/} Less than 500,000 bushels.

The usual report from the office of the Canadian Commercial Secretary (Agriculture) at Buenos Aires has not been received this month and the following comments have been derived from trade and other sources.

Crop Conditions Trade sources continue to stress uncertain factors in the outlook for the Argentine wheat crop. There appears to be little doubt that sizable reductions occurred in acreages seeded to wheat, particularly in Santa Fe and Cordoba. While these areas seem to have suffered most from lack of moisture earlier in the season, nearly all parts of the wheat-growing belt were affected to some extent. Rains during September checked deterioration in Santa Fe and Cordoba and have maintained fair to good conditions in other areas. The moisture came too late, however, to permit any appreciable increase in planting in those areas where drought had prevented seeding at the usual time. In view of the general inadequacy of moisture reserves, frequent showers will be required to bring the crop to maturity.

Argentine Grain Shipments, January—August, 1951

| Destination | Wheat | Corn | Flax | Oats | Rye | Barley |
|----------------------|--------|-------|-------|-------|-------|--------|
| - thousand bushels - | | | | | | |
| Austria | - | - | - | - | 321 | - |
| Belgium | 1,698 | 623 | 626 | 313 | 699 | 451 |
| Brazil | 24,199 | - | - | 58 | - | 46 |
| Chile | 911 | - | 10 | - | - | - |
| Czechoslovakia . | - | - | - | - | 390 | - |
| Denmark | - | - | - | - | 574 | - |
| Egypt | 563 | - | - | - | - | - |
| Finland | - | 131 | 37 | - | 1,220 | - |
| France | 736 | 1,730 | 2,371 | - | - | - |
| French Africa .. | 2,318 | 39 | - | - | - | - |
| Germany | 4,510 | 334 | 90 | 955 | 1,868 | 558 |
| Holland | 1,331 | 520 | 985 | 1,253 | 1,740 | 341 |
| India | 17,289 | - | - | - | - | - |
| Italy | 15,049 | - | 260 | - | - | 139 |
| Norway | - | - | 411 | 195 | - | - |
| Paraguay | 1,431 | - | - | - | - | - |
| Peru | 1,616 | - | - | - | - | - |
| Portugal | - | - | 236 | - | - | - |
| Spain | - | - | 75 | - | - | - |
| Sweden | 1,102 | - | 118 | 205 | 166 | - |
| Switzerland | 1,931 | - | 217 | 168 | - | - |
| United Kingdom . | 1,764 | 162 | 965 | 529 | 4 | - |
| Uruguay | - | - | - | 223 | - | - |
| Totals | 76,449 | 3,539 | 6,400 | 3,900 | 6,981 | 1,534 |

AUSTRALIAN SITUATION

Supply Position Despite smaller exportable supplies than in 1949-50, current crop year exports of Australian wheat continue in larger volume than last year. Combined exports of wheat and wheat flour in terms of wheat from December 1, 1950 to August 30, 1951 amounted to 100.8 million bushels as against 84.1 million for the comparable period of 1949-50. Exports of wheat as grain increased from 58.5 million bushels to 66.9 million, while exports of wheat flour in terms of wheat were up from 25.6 million to 33.9 million bushels. The balance remaining on August 31, 1951 for export and carryover was estimated at 47.3 million bushels as against 74.9 million a year ago.

Australian Wheat Supplies

| Item | 1950-51 <u>1/</u> | 1949-50 |
|---|---------------------|---------|
| | - million bushels - | |
| Carryover at November 30 (including flour as wheat).... | 43.9 | 19.1 |
| New crop | 183.4 | 218.2 |
| Total estimated supplies | 227.3 | 237.3 |
| Less estimated domestic requirements for crop year | 79.2 | 78.3 |
| Available for export and carryover | 148.1 | 159.0 |
| Deduct: | | |
| Exports of wheat as grain, December 1—August 30 | 66.9 | 58.5 |
| Exports of wheat flour in terms of wheat | | |
| December 1—August 30 | 33.9 | 25.6 |
| Total exports of wheat and wheat flour | 100.8 | 84.1 |
| Balance on August 31 for export and carryover | 47.3 | 74.9 |

1/ Preliminary.

Australian Cable The following cable, dated September 21, 1951, has been received from the Commercial Secretary for Canada (Agricultural) in Melbourne:

"Australian wheat stocks at September 13 totalled 56,049,000 bushels. Wheat exports from December 1, 1950 to September 13 totalled 69,467,000 bushels with shipments during preceding six weeks mainly to United Kingdom. Flour exports for the same period were 655,554 long tons, with 18,731 going to India, 10,906 to Egypt, 10,867 to the United Kingdom and 9,716 to Indonesia. Area sown to wheat for 1951-52 season estimated at 10,600,000 acres with estimated crop of 150 million bushels." (Editor's Note: A later estimate by Broomhall, on September 27, places the crop at 130 million bushels.)

The Outlook The following article by P.C. Druce, B.Ec., appeared in the
for Wheat June 1 issue of "The Agricultural Gazette of New South Wales" and is reproduced, in part, to provide readers with the background to recent developments in the outlook for the Australian wheat industry.

"Despite the heavy demand for Australian grain, wheat acreages in this country have been falling for several years past. The area sown this season is expected to show a further marked decline compared with the area sown in 1950. Given normal seasons, the quantity of Australian wheat available for export in the near future must fall below the export surpluses which have been available in recent years. In the event of an adverse season, Australia may find itself unable to meet its I.W.A. quota.

There has been a steady decline in the area sown to wheat in Australia since the 1947-48 season, when a post-war peak of 13,880,000 acres was sown. The decline in wheat acreages during that period has been particularly marked in New South Wales. The Australian acreage in 1950-51 was 14 per cent lower than in 1947-48, whereas the acreage sown in New South Wales fell by 33 per cent during the same period. In contrast to the other States, the area sown in Western Australia and Queensland has shown a fairly steady increase during those years.

The fall in wheat acreages in the past three years in New South Wales, Victoria and South Australia has been caused by a combination of several factors. High wool prices; shortages of machinery, superphosphate and bags; transport and handling difficulties; and seasonal conditions have all resulted in reduced sowings.

It is undoubtedly true that seasonal conditions have been, to some extent, responsible for the reduced sowings, abnormally wet weather being the restricting influence in most instances, except in so far as the current season is concerned. A prolonged spell of dry weather in nearly all wheat districts in the eastern States is one of the factors which will result in reduced sowings this season. Yields have been above normal for the past four seasons, and exceptionally heavy crops have been harvested.

However, seasonal conditions have not been the major factor resulting in the severe decline in wheat acreages which has taken place in recent years.....

Undoubtedly the major factor which has resulted in reduced wheat areas is the price relationship between wheat and wool. The spectacular rise in the price of wool, particularly in the past two seasons, has not been accompanied by an increase in wheat prices. On the contrary, the return obtained by wheat producers has shown a small but significant fall since the 1947-48 season.

Relative changes in wool and wheat prices since 1947-48 are shown in Table I. The figures are based on the average returns or anticipated returns to producers for wheat and wool during each of the four seasons in question. Returns to wheat growers in the three seasons 1948-49 to 1950-51 are based on the assumption that the export tax imposed under the wheat stabilisation plan will be refunded in full. They therefore represent maximum possible returns; actual returns may be lower. The wool figures are final except in so far as the current (1950-51) season is concerned.

Returns to wheatgrowers for next season's wheat are not likely to exceed those of 1950-51. If adverse seasonal conditions or reduced sowings result in a below-normal harvest, the return to growers is likely to be lower than

in recent years. Under present circumstances, where export prices are appreciably higher than local prices, the return to producers falls with a small crop and rises with a heavy crop.

Table I.--Relative Returns to Producers for Wheat and Wool, 1947-48 to 1950-51
(1947-48 = 100)

| Season | Wheat | Wool |
|---------------|--------|---------|
| 1947-48 | 100 | 100 |
| 1948-49 | 80 (a) | 122 |
| 1949-50 | 91 (a) | 160 |
| 1950-51 | 88 (a) | 382 (b) |

(a) Based on anticipated returns assuming wheat export tax is refunded in full.

(b) Based on average price to May, 1951.

While the present relationship between wheat and wool prices continues, no increase in wheat areas can be anticipated; the area sown may decline still further.

Australia has agreed to supply 87 million bushels of wheat in each of the next two seasons under the International Wheat Agreement. In recent years local requirements have absorbed about 80 million bushels annually.

The pre-war average yield was approximately 12 bushels per acre. Judging from recent trends, it would not appear likely that the area sown this season will exceed 11 million acres by any substantial margin. It may even fall below that figure. Given average yields, the crop is therefore unlikely to exceed 140 million bushels. Australia may therefore have difficulty in meeting its obligations under the I.W.A., unless yields are again well above normal, as they have been in the past three seasons. In the event of a normal yield this year, the position could probably be met by drawing upon stocks, but there can be no doubt that the current trend in the Australian wheat industry is likely to prejudice seriously this country's ability to fulfil its international obligations in the future. Alternatively, Australia may have to accept a reduced quota should the I.W.A. be renewed for a further period, following the expiration of the current agreement in 1953."

CALENDAR OF WHEAT EVENTS

- September 5 - The Rt. Hon. C.D. Howe announced the sale of 14.9 million bushels of milling grades of Canadian wheat to India under terms of the International Wheat Agreement. The wheat will be delivered under a shipping programme extending from October, 1951 to July, 1952.
- 7 - On the basis of crop conditions on September 1, the yield of wheat in England and Wales was forecast at 37.5 bushels per acre, compared with 39.2 bushels in 1950.
- 11 - Production of all wheat in the United States is now placed at 999 million bushels, compared with 1,027 million in 1950 and the 1940-1949 average of 1,071 million.
- 14 - In its second estimate of production of Canada's 1951 wheat crop, based on conditions at August 31, the Dominion Bureau of Statistics forecast the wheat crop at a record 579.3 million bushels.
- 21 - Sales and purchases recorded by the International Wheat Council for the crop year 1951-52 amounted to 194.9 million bushels as of this date. The United States had recorded sales of 90.2 million bushels while Canada and Australia accounted for 66.9 million and 37.8 million, respectively.
- 24 - The Bureau of the Census, United States Department of Commerce, estimated July wheat flour production at 18.1 million sacks, or an average of 860,000 sacks per working day. Wheat flour mills during July ground 42.1 million bushels of wheat and worked at 75.7 per cent of rated capacity.
- 25 - The Canadian Wheat Board announced that, under specified conditions, effective October 1, 1951, "when the wheat delivery quota at a delivery point has been increased to eleven (11) bushels or higher such delivery point shall automatically become an alternative delivery point at which a producer may deliver wheat up to the quota in effect at that point....."
- 27 - The United States Department of Agriculture announced that farmers had put 68.2 million bushels of 1951-crop wheat under Commodity Credit Corporation price support up to August 31 as compared with about 57 million bushels of 1950-crop wheat during the July 1-August 31 period last year. Of this year's totals, 4.9 million were stored on farms and the balance in warehouses.
- Broomhall reported an estimate of this year's Australian wheat crop at 130 million bushels as compared with earlier estimates of 150 million and last year's crop of 183.4 million.

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