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DOMINION BUREAU OF STATISTICS
AGRICULTURE DIVISION

THE WHEAT REVIEW



NOVEMBER, 1951



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THE WHEAT REVIEW, NOVEMBER 1951

Page 1 - For "October 1" in first line, second paragraph, read "November 1".

Page 4 - For "1950-51" in second line, fifth paragraph, read "1951-52".

DOMINION BUREAU OF STATISTICS
Department of Trade and Commerce

THE
WHEAT REVIEW

NOVEMBER, 1951

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Minister of Trade and Commerce

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WORLD WHEAT SITUATION

Current Supplies Latest available estimates indicate that supplies of wheat remaining on or about November 1, 1951 in the four major exporting countries for export and carryover at the end of their respective crop years amounted to 1,063 million bushels, slightly below the 1,091 million available a year ago. The location of potential exportable supplies this year, however, is considerably different from the position at the same time in 1950. An estimated increase of some 146 million bushels in Canadian wheat supplies almost offset decreases in the United States, but in the Southern Hemisphere stocks in both Australia and Argentina were lower than a year ago.

Supplies at October 1 this year (to nearest million bushels) were held as follows, with last year's figures in brackets: United States, 500 (648); Canada, 524 (378); Australia 28 (52); and Argentina 11 (13). Data for all countries include both commercial and farm stocks.

In the United States, reductions in carryover and new crop, and increases in estimated domestic requirements and exports have all contributed to smaller available exportable supplies on November 1, 1951 as compared with a year ago. Since part of the western Canadian wheat crop is still unharvested, full realization of the current estimate is dependent on the development of suitable threshing and combining conditions in the affected areas during the winter and spring months.

The Argentine wheat crop now being harvested is expected to provide little more than home requirements and a negligible export surplus. The trade forecasts that as a result of adverse climatic conditions the 1951-52 wheat crop will not exceed 3.5 million metric tons (some 129 million bushels). Other sources have placed the probable outturn at even lower levels. No recent official estimates are available regarding the Australian wheat crop. However, some trade sources now place the crop somewhere in the vicinity of 160 million bushels. If a crop of this size should be realized Australia should come closer to filling her I.W.A. commitments than was anticipated somewhat earlier in the season.

World wheat import requirements are expected to remain at a fairly high level through 1951-52. With exportable supplies running below last year's level it may be anticipated that export prices for wheat outside I.W.A. will remain firm for some months to come with I.W.A. wheat continuing to sell at the maximum price.

International Wheat Agreement Sales and Purchases Transactions under the I.W.A. recorded by the International Wheat Council up to November 16 (except for Canadian sales which were reported up to November 20) totalled 291.9 million bushels or about 50 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: United Kingdom, 52.8; India, 47.4; Germany, 27.9; Italy, 18.6; Netherlands, 15.2; Belgium, 12.4; and Brazil, 12.3. Of the 42 importing countries participating in the Agreement, 15 have already purchased their 1951-52 quotas. Sales by the four exporting countries, in millions of bushels, were as follows: the United States, 130.4; Canada, 101.7; Australia, 59.7 and France, 0.1.

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

Importing Countries	Guaranteed Quantities	Source				Total Purchases
		Canada 1/	Australia 2/	France 2/	U.S.A. 2/	
- thousand bushels -						
Austria	11,023	-	-	73	1,532	1,605
Belgium	20,209	9,456	-	-	2,964	12,420
Bolivia 3/	2,756	2,030	-	-	766	2,796
Brazil	13,228	2,450	-	-	9,840	12,290
Ceylon 2/	6,614	-	4,376	-	1,448	5,824
Costa Rica 3/	1,213	777	-	-	430	1,207
Cuba	7,422	3,935	-	-	3,465	7,400
Denmark	1,617	538	-	-	-	538
Dominican Republic 3/	876	537	-	-	348	885
Ecuador 3/	1,286	470	-	-	831	1,301
Egypt	14,697	-	-	-	4,569	4,569
El Salvador 3/	404	173	-	-	234	407
Germany	66,139	2	2,904	-	25,018	27,924
Greece	15,726	5	-	-	4,960	4,965
Guatemala 3/	919	177	-	-	549	726
Haiti 3/	1,029	419	-	-	684	1,103
Honduras Republic 3/	367	170	-	-	197	367
Iceland	404	50	-	-	68	118
India	55,116	14,933	10,014	-	22,411	47,358
Indonesia	3,674	6	1,026	-	1,037	2,069
Ireland	10,104	5,227	1,628	-	254	7,109
Israel	5,879	972	-	-	1,644	2,616
Italy	40,418	9,043	3,879	-	5,645	18,567
Japan	18,372	3,387	-	-	3,505	6,892
Lebanon 3/	2,388	8	-	-	2,441	2,449
Liberia 2/	37	25	-	-	11	36
Mexico	12,860	-	-	-	4,880	4,880
Netherlands	24,802	3,998	2,856	-	8,327	15,181
New Zealand	4,593	-	4,521	-	-	4,521
Nicaragua 3/	331	195	-	-	127	322
Norway	7,716	2,987	-	-	4,375	7,362
Panama 3/	625	303	-	-	321	624
Peru 3/	5,512	3,172	-	-	2,267	5,439
Philippines	7,202	1,147	2	-	864	2,013
Portugal	5,626	231	132	-	2,932	3,295
Saudi Arabia	1,837	-	52	-	453	505
Spain	4,373	-	-	-	-	-
Sweden	2,756	-	1,493	-	1,045	2,538
Switzerland	6,430	3,024	-	-	2,077	5,101
Union of South Africa	11,023	5,600	-	-	2,053	7,653
United Kingdom	177,068	21,534	26,827	-	4,429	52,790
Venezuela 3/	6,246	4,696	-	-	1,428	6,124
Totals	580,917	101,677	59,710	73	130,429	291,889
Guaranteed Sales		232,979	88,700	4,089	255,149	580,917
Balance		131,302	28,990	4,016	124,720	289,028

1/ Canadian sales through November 20, 1951.

2/ Sales recorded by International Wheat Council through November 16, 1951.

3/ Quota filled.

CANADIAN SITUATION

Final Payment on 1950-51 Pool Wheat The Right Hon. C. D. Howe, Minister of Trade and Commerce, announced in the House of Commons on November 19, 1951, that an average final payment of 28.65 cents per bushel would be made on the 366.2 million bushels of wheat delivered to the Canadian Wheat Board in 1950-51. Extracts from Mr. Howe's speech follow:

"During 1950-51 producers delivered a total of 366.2 million bushels of wheat to the Board. Of these deliveries approximately 150 million bushels graded No. 5, No. 6 and feed. Some No.5 wheat was sold for milling purposes but the great part of the lower grades delivered to the Board in 1950-51 had to be marketed as feed grain.

The 1950-51 pool account was closed out on October 20, and final accounting has now been completed. In closing out the pool, a total of 95.3 million bushels of wheat was transferred to the 1951-52 pool under the provisions of section 24(a) of the Canadian Wheat Board Act. Of the amount of wheat so transferred, about 25.0 million bushels consisted of milling grades of wheat which were covered by open sales contracts for future delivery. These stocks of milling grades were transferred at prices in line with sales contracts after an allowance had been made for carrying charges. The larger part of the transfer—about 70 million bushels—consisted of lower grades of wheat which were partially covered by open sales contracts for future delivery. Having in mind these contracts and sales prospects, stocks of low grade wheat were transferred to the new pool on the basis of the Board's asking prices on October 20, less an allowance for continuing charges and market risks.

The net surplus in the 1950-51 wheat pool is \$104,933,267.56. This means an average final payment of 28.65 cents per bushel on 366.2 million bushels of wheat delivered to the Board in 1950-51. The final payments, and total returns to producers basis in store Fort William-Port Arthur or Vancouver for each of the principal grades are as follows:

Grade	Final payment	Total return to producers
	cents per bushel	\$ per bushel*
No. 1 Northern	25.498	1.85498
No. 2 Northern	25.809	1.82809
No. 3 Northern	29.343	1.79343
No. 4 Northern	32.076	1.74076
No. 5 Northern	32.030	1.64030
No. 6 Northern	24.511	1.50511
Feed wheat	24.562	1.44562

* Basis Fort William-Port Arthur or Vancouver.

.... The distribution of final payment cheques to producers will commence within a few days, and the final wheat payment will be completed prior to Christmas."

Details of the final payments on the 339 grades of wheat for which the Board maintained separate pools may be found on pages 1127-1130 of the November 19, 1951 official report of the House of Commons Debates.

Supply Position and Export Outlook Canadian wheat supplies for 1951-52, comprised of carryover stocks of 186.4 million bushels and the 1951 crop estimated, on the basis of conditions at October 31, at 562.4 million, are currently placed at 748.8 million bushels. Supplies of the size indicated would be some 175 million greater than in 1950-51. However, full realization of the latest production estimate depends upon the extent to which the unthreshed portion of crop escapes injury from lengthy exposure and on the development of conditions suitable for combining and threshing in the affected areas during the winter and spring months.

Should domestic use (human consumption, seed, live-stock feed and waste) approach the 150 million bushel level, some 600 million bushels would be available for export or for carryover at the end of the crop year. Canada's sales quota under I.W.A. for 1951-52 amounts to approximately 233 million bushels. By November 27 total Canadian sales reported under I.W.A. amounted to 107 million. Of this, 26 million bushels were reported as sales to the United Kingdom leaving 81 million reported to other countries. The United Kingdom agreed in July to purchase 113 million bushels of wheat (including 18 million of flour in wheat equivalent) from Canada under I.W.A. during 1951-52. This firm commitment of 113 million together with the 81 million of sales already reported to other countries gives a total of 194 million bushels definitely committed under the agreement up to November 27. In other words, nearly 83 per cent of Canada's quota under the agreement had been committed in just under four months. If transportation and storage difficulties can be overcome it seems evident that the entire Canadian quota will be taken up, and in addition significant quantities of Class II wheat may also be disposed of during the crop year. Relative to this last point it is observed that nearly 8 million bushels of feeding grades of wheat moved to the United States during the first three months of the current crop year.

With a strong market in prospect and large supplies in interior positions it is apparent that the volume of exports in 1950-51 will depend vary largely on the facility with which our transportation and storage systems are able to place wheat in seaboard positions. Among the factors impeding rapid movement from country positions are the following:

1. The extremely late harvest which shortened the normal fall period of grain movement by both rail and water and caused congestion at many storage points.
2. The large proportion of grain grading damp and tough which throws a heavy load on terminal drying facilities, at the same time delaying the flow of grain through the terminals.
3. The substantial quantity of grain remaining unthreshed, particularly in Alberta, and to a lesser extent in Saskatchewan and northwestern Manitoba. With winter having set in over the West, further harvesting in most areas will be at a relative standstill until spring.

On balance it may be surmised that, despite the strong prevailing market, actual export movement will be limited to a considerable degree by the difficulties outlined above and that the total carryover of wheat at July 31, 1952, will be well above the level of 186 million held in all positions a year earlier.

Exports of wheat as grain for the first quarter of the current crop year amounted to 65.9 million bushels, as against 40.4 million for the August—October period in 1950, while exports of wheat flour in terms of wheat were up from 9.0 million to 9.2 million bushels. The major markets for Canadian wheat as grain during the three months ending October 31, 1951 were as follows (with exports in million bushels): the United Kingdom, 23.5; Belgium, 5.6; Netherlands 4.7; Brazil, 2.6; Sweden 2.5; Ireland, 2.1; and Japan 2.1. The balance remaining on November 1, 1951 for export and carryover was estimated at 523.7 million bushels, compared with 378.0 million a year ago.

Canadian Wheat Supplies

Item	1951-52 <u>1/</u>	1950-51
	- million bushels -	
Carryover in North America at July 31	186.4	112.2
New crop	562.4 <u>2/</u>	461.7
Imports of wheat, August-September	<u>3/</u>	<u>3/</u>
Total estimated supplies	748.8 <u>4/</u>	573.9
Less estimated domestic requirements for crop year.	150.0	146.5 <u>4/</u>
Available for export and carryover	598.8 <u>4/</u>	427.4 <u>4/</u>
Deduct:		
Overseas clearances of wheat as grain,		
August 1 to October 31	57.4	38.1
Exports of Canadian wheat to U.S.,		
August 1 to October 31	8.4	2.3
Total exports of wheat	65.9	40.4
Exports of wheat flour in terms of wheat,		
August 1 to October 31	9.2	9.0 <u>5/</u>
Total exports of wheat and wheat flour	75.1	49.4
Balance on November 1 for export and carryover	523.7	378.0

1/ Preliminary.

2/ November estimate.

3/ Less than 50,000 bushels.

4/ Revised.

5/ Adjusted for time lag in returns made by Customs.

November Estimate of Canada's 1951 Wheat Crop Canada's 1951 wheat crop, estimated at 562 million bushels on the basis of conditions at October 31, is slightly more than 100 million greater than the 1950 outturn and second only to the record 567 million harvested in 1928. It should be noted, however, that extremely unfavourable weather conditions prevailed throughout practically the entire normal harvesting period in Western Canada, and as a result a substantial proportion of the Alberta crop, and to a smaller extent that of Saskatchewan and Manitoba, is likely to remain in the fields until next spring. Full realization of the current estimate will depend on the extent to which the unthreshed portion of the crop escapes injury from lengthy exposure and on the development of conditions suitable for combining and threshing in the affected areas during the winter and spring months. Loss in grade is already evident from the effects of excessive moisture but despite this, it is anticipated that the proportion of milling grades in the current crop will be considerably higher than in 1950.

November Estimate of Production of Canadian Wheat, 1951
Compared with 1950

	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	28.0	30,067,000	25,516,000
Spring wheat .	26,093,200	24,820,000	16.5	21.6	431,597,000	536,882,000
All wheat ...	27,021,200	25,731,300	17.1	21.9	461,664,000	562,398,000
<u>Prairie Provinces</u>						
Manitoba	2,382,000	2,400,000	21.0	21.7	50,000,000	52,000,000
Saskatchewan .	16,203,000	15,810,000	16.0	20.8	260,000,000	329,000,000
Alberta	7,251,000	6,364,000	16.1	23.6	117,000,000	150,000,000
Totals	25,836,000	24,574,000	16.5	21.6	427,000,000	531,000,000

In the Prairie Provinces the wheat crop is now placed at 531 million bushels as against 427 million last year and the record of 545 million in 1928. The estimated average yield per acre in the Prairie Provinces this year is 21.6 bushels per acre, with Manitoba averaging 21.7, Saskatchewan 20.8 and Alberta 23.6 bushels per seeded acre. The wheat crop in the Prairie Provinces contains a small proportion of winter wheat grown chiefly in Alberta and included under the spring wheat classification in this estimate. The 1951 production of wheat in the remainder of Canada is placed at some 31 million bushels, with Ontario's outturn of 26.5 million (of which 25.5 million is winter wheat) accounting for the principal part.

Farmers' Marketings Deliveries of wheat by Western Canadian farmers during recent weeks have fallen off sharply from the record 43.7 million bushels marketed in the week ending October 18. Up to November 15 of the current crop year primary marketings in the Prairie Provinces totalled 169.9 million bushels as against 189.6 million for the comparable period last year. Farmers in Saskatchewan delivered 99.7 million bushels for the period of 1951-52 under review, while those in Alberta and Manitoba marketed 43.4 million and 26.8 million bushels respectively.

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	18,618,298
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	20,757,886
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	15,242,219
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	11,391,713
Totals	26,833,767	99,688,948	43,352,724	169,875,439	189,570,836

Delivery Quotas The Canadian Wheat Board's Summary of the number of Western Canadian shipping points in each quota group as at November 23 indicated that some progress is being made in easing delivery quota restrictions. However, as at November 23, 724 points or approximately 35 per cent of the total were still on the initial quota of 6 bushels per seeded acre.

Summary of Elevator Shipping Points in Each Quota Group
for Wheat in Western Canada as at November 23, 1951

Province	Quota in Bushels Per Seeded Acre						Open	Suspended*	Total
	6	8	10	12	15	20			
Manitoba	-	-	73	56	146	102	-	-	377
Saskatchewan	574	214	230	77	28	2	-	-	1,125
Alberta and British Columbia.	150	48	66	29	16	1	2	282	594
Totals	724	262	369	162	190	105	2	282	2,096

* When threshing in volume is resumed it may become necessary to reimpose quotas in effect prior to suspension.

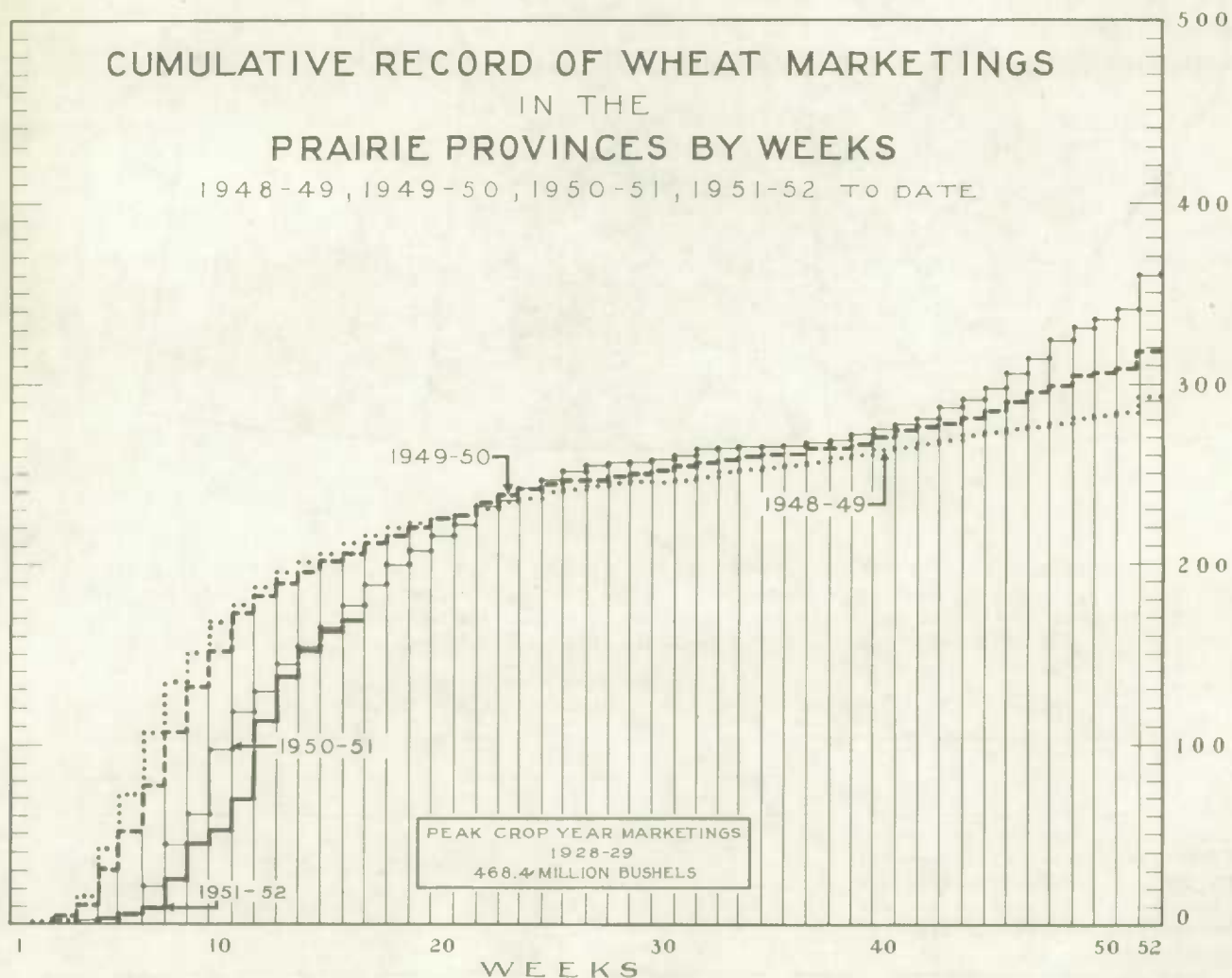
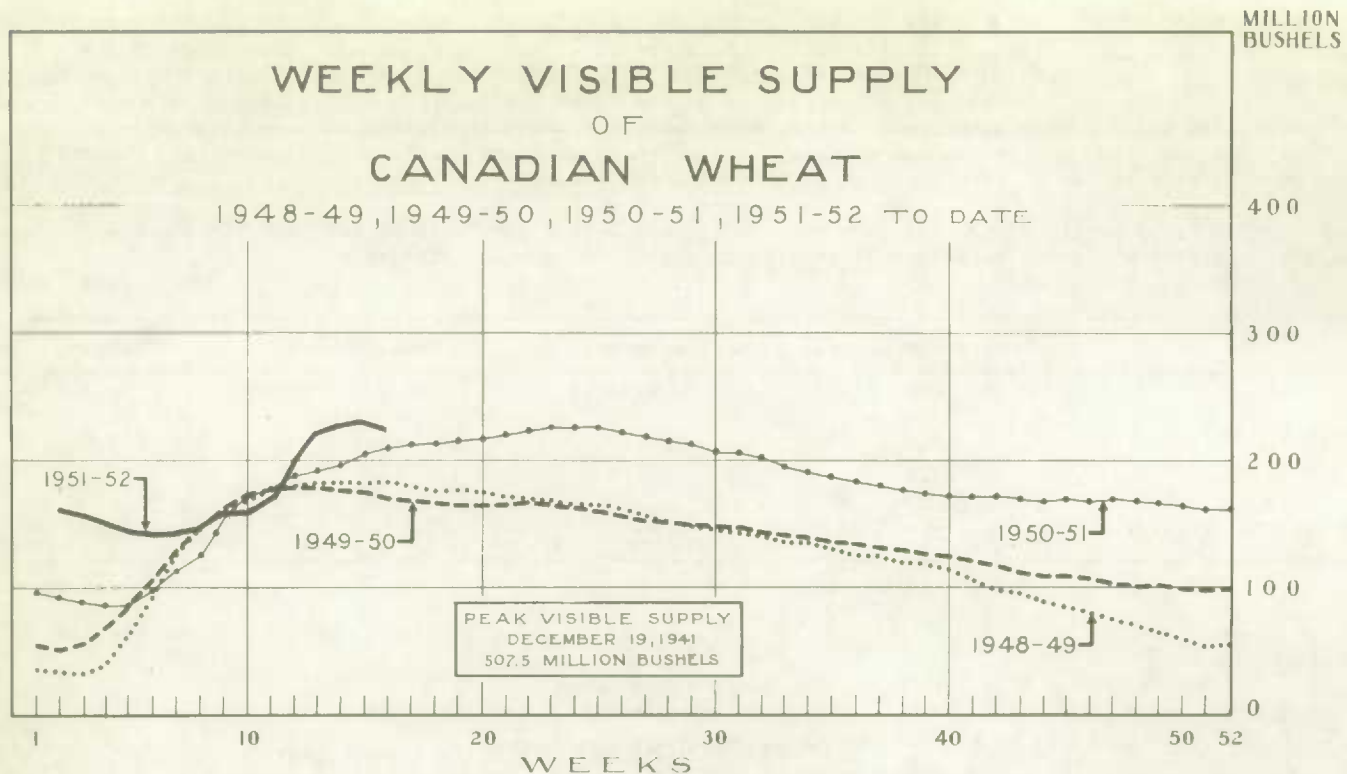
Visible Supply of Canadian Wheat, November 15, 1951 Compared with
Approximately the Same Date, 1950 and 1949

Position	1951	1950	1949
- thousand bushels -			
Country elevators - Manitoba	6,868	10,877	6,497
Saskatchewan	74,755	70,522	44,660
Alberta	31,472	44,418	37,201
Totals	113,095	125,817	88,358
Interior private and mill elevators	5,242	4,664	3,987
Interior terminals	10,642	4,701	101
Vancouver-New Westminster	4,794	9,620	11,248
Prince Rupert	326	-	-
Churchill	1,997	461	126
Fort William-Port Arthur	33,202	28,994	11,836
In transit rail (Western Division)	13,002	10,380	12,121
Eastern elevators lake ports	17,134	11,447	18,958
St. Lawrence and seaboard ports	10,972	7,284	15,425
In transit lake	8,805	5,767	5,808
In transit rail (Eastern Division)	1,894	1,201	2,041
United States ports	1,816	151	936
In transit U.S.A.	241	-	221
Totals	223,161	210,487	171,165

Grading of Wheat Inspected, August--October, 1951 and 1950

Grade	August--October, 1951		August--October, 1950	
	cars	per cent	cars	per cent
1 Northern	805	1.2	3,405	8.3
2 Northern	6,043	9.3	11,426	27.9
3 Northern	11,913	18.4	5,591	13.6
4 Northern	7,072	10.9	3,746	9.1
5 Wheat	9,493	14.6	5,261	12.8
6 Wheat	8,138	12.5	3,343	8.2
Feed Wheat	1,158	1.8	1,008	2.5
Garnet	259	0.4	524	1.3
Amber Durum	1,516	2.3	1,873	4.6
Alberta Winter	226	0.4	337	0.8
Toughs <u>1</u> /	16,704	25.7	3,252	7.9
Damps <u>1</u> /	799	1.2	652	1.6
All Others	799	1.2	542	1.3
Totals	64,925	100.0	40,960	100.0

1/ All varieties and grades.



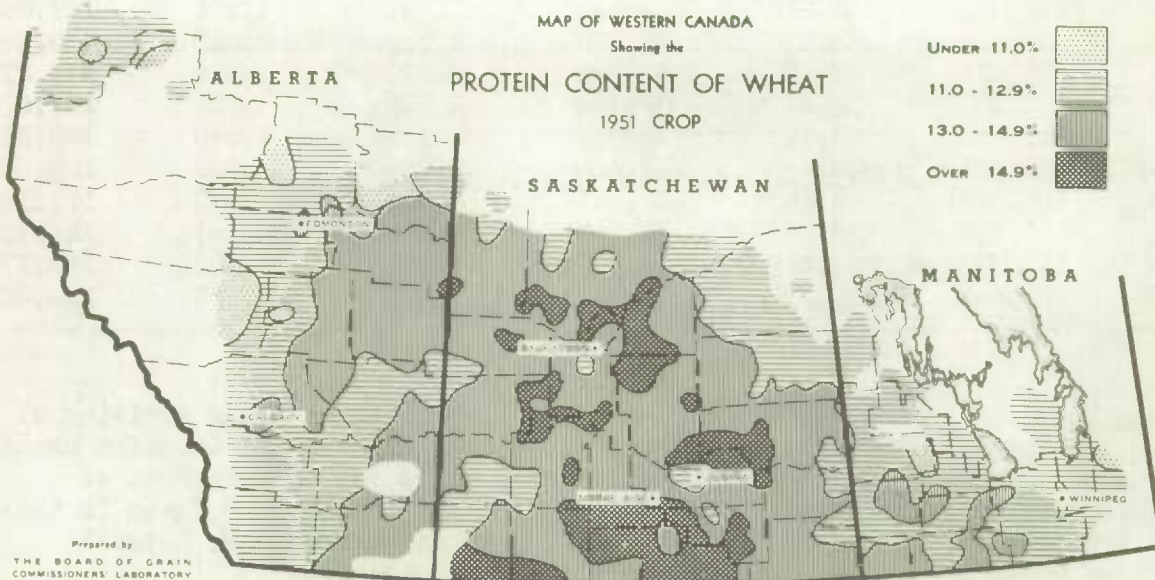
(Data in both charts for crop years beginning August 1)

Protein Content of
Western Canada's 1951
Hard Red Spring Wheat

The average protein content of the 1951 Western hard red spring wheat crop is 13.8 per cent according to a report of the Grain Research Laboratory of the Board of Grain Commissioners. This figure is 0.2 percentage points higher than the value for last year's survey which was the same as the average for the past 20 years. As the survey was completed after rains had interrupted harvesting and a considerable portion of the crop was subsequently covered by snow, certain areas were not completely represented. However, the general picture is not likely to change much when the entire crop has been tested.

Data by province show that the average protein levels for Manitoba and Saskatchewan are higher this year while the value for Alberta is lower. Means are as follows:

	Prairie Provinces	Manitoba	Saskatchewan	Alberta
	p.c.	p.c.	p.c.	p.c.
1951	13.8	12.9	14.2	13.0
1950	13.6	12.2	13.9	13.9
Difference	0.2	0.7	0.3	-0.9



The survey on which these data are based was made with 5,437 samples of statutory grades (1 to 4 Northern, 4 Special and the Garnet grades) drawn from 1,386 shipping points in the Prairie Provinces. Numbers of samples collected in proportion to production were as follows: Manitoba, 578 samples from 191 shipping points; Saskatchewan, 3,456 from 846 points; and Alberta 1,403 from 349 points.

The protein content and number of samples for each grade are shown below.

Grade	Number of Samples		Protein Content	
	1951	1950	1951	1950
	- number -		- per cent -	
1 Northern	112	380	13.6	13.3
2 Northern	1,837	1,648	13.8	13.4
3 Northern	2,608	1,533	13.6	13.8
4 Northern	746	898	14.1	13.9
Garnet grades	40	63	11.8	13.2

Lake Shipments Lake shipments of the five major grains from Fort William-Port Arthur from the beginning of the current navigation season to November 15 amounted to 260.1 million bushels, an increase of 97.3 million over the comparable period last year. Wheat shipments, at 161.6 million bushels, accounted for approximately 62 per cent of this year's total volume for all grains and exceeded last year's wheat shipments for the comparable period by 50.3 million. Substantial increases were also registered in shipments of oats which rose from 21.1 million to 50.3 million bushels and for barley shipments which were up from 22.8 million to 40.0 million bushels. Combined shipments of rye and flaxseed were slightly higher this year than last, with increases in rye shipments more than offsetting decreased movement of flaxseed.

Lake Shipments of Canadian Grain from the Opening of Navigation to November 15, 1951 and to Approximately the same Date, 1941 to 1950

Year	Wheat	Oats	Barley	Rye	Flaxseed	Total
- thousand bushels -						
1941	192,725	8,062	9,045	5,195	1,497	216,523
1942	150,553	7,270	7,166	991	1,106	167,085
1943	185,526	36,838	39,178	1,519	6,020	269,081
1944	259,416	68,573	50,390	7,203	5,696	391,278
1945	302,197	78,642	39,750	3,876	3,406	427,872
1946	111,887	49,523	25,724	2,151	1,668	190,954
1947	135,141	38,653	22,686	7,256	1,860	205,597
1948	107,649	28,967	26,741	4,924	6,907	175,188
1949	150,756	38,553	31,769	12,109	8,363	241,552
1950	111,378	21,067	22,827	4,202	3,303	162,778
1951	161,641	50,255	40,004	6,422	1,767	260,088

Saskatchewan Wheat Diverted to Vancouver In view of the high proportion of tough grain arriving at Vancouver from Alberta shipping points, the Canadian Wheat Board has taken action to provide for the movement of increased quantities of dry grain to that port. The principal steps taken in this connection are covered in "Instructions to the Trade" Nos. 17 and 22, dated November 2 and November 19, respectively.

In the first of these instructions, elevator companies were requested to notify their agents in Saskatchewan at stations with a freight differential of 1 cent per hundred pounds in favour of Fort William, to ship all wheat expected to grade dry 1, 2, 3 or 4 Northern to Vancouver. At the same time, agents at the 126 shipping points covered by this instruction were requested to ship wheat of these grades expected to grade tough or damp to Fort William. In the second instruction, dated November 19, similar arrangements were extended to 106 Saskatchewan shipping points having a freight differential of 2 cents per hundred pounds, and 102 shipping points having a freight differential of 3 cents per hundred pounds in favour of Fort William. In both instances some tolerance was allowed should an occasional car grade tough, or degrade to No. 5 Wheat.

Wheat Shipments to the United States by Destination
August 1 to November 15, 1951
Compared with Approximately the Same Period, 1950 and 1949

Destination	1951	1950	1949
	bu.	bu.	bu.
<u>By Vessel</u>			
Buffalo	7,080,329	3,087,677	5,081,621
Oswego	514,005	-	-
Duluth-Superior	3,091,003	234,352	-
Chicago	556,070	-	-
Milwaukee	120,426	-	-
Totals, Vessel Shipments	11,361,833	3,322,029	5,081,621
<u>By Rail</u>			
U.S.A. Seaboard Ports	1,400	35,619	-
Other U.S.A. Points	1,380,967	134,332	17,500
Totals, Rail Shipments	1,382,367	169,951	17,500
Grand Totals	12,744,200	3,491,980	5,099,121

Wheat shipments to the United States, either for re-export or retention for domestic use, from the beginning of the current crop year to November 15 amounted to 12.7 million bushels, up sharply from the 3.5 million and 5.1 million bushels shipped during the comparable periods of 1950 and 1949, respectively. Of the 11.4 million bushels shipped by vessel during the current crop year, 7.1 million bushels went to Buffalo. The next largest volume of lake shipments, totalling 3.1 million bushels, went to Duluth-Superior with the remainder going to Chicago, Oswego and Milwaukee. Rail shipments, at 1.4 million bushels, were also up sharply from those of the corresponding periods of the two preceding crop years.

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

Ports	August 1 to October 31, 1951	August 1 to October 31, 1950
	- bushels -	
Collingwood	-	1,000
Midland	-	138,744
Port McNicoll	215,648	-
Prescott	1,500	-
Totals	217,148	139,744

Rail shipments of wheat to Maritime ports from Bay, Lake and Upper St. Lawrence ports for the first quarter of the current crop year totalled 217,148 bushels as against 139,744 bushels for the August-October period last year. The relatively small rail movements between these groups of ports for the period under review are in keeping with the usual pattern during the navigation season.

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		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

Rail shipments of wheat from the Lakehead during October amounted to 159,667 bushels, down sharply from the preceding month, and the lowest monthly total since last November. However, total rail shipments from Fort William-Port Arthur for the first quarter of 1951-52, at 879,000 bushels, were more than double the volume moved during the August-October period in each of the two preceding years. Distribution of this year's October shipments by grade and destination are shown in the table below. With the exception of some 11,000 bushels, all of the October 1951 shipments went to destinations in Quebec and Ontario. As in previous months, a substantial proportion of the shipments was of non-millable wheat.

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

Grade	P.E.I.	N.S.	N.B.	Que.	Ont.
- bushels -					
1 Northern	-	-	-	7,754	-
2 Northern	-	-	-	6,000	19,000
3 Northern	-	-	-	4,000	7,500
5 Wheat	-	-	-	333	2,025
6 Wheat	-	-	-	28,967	2,833
Feed Wheat	-	-	-	6,000	-
Amber Durum	1,333	1,333	3,000	12,833	8,000
Alberta Winter	-	-	-	-	8,516
All Others	-	5,539	-	24,555	10,146
Totals	1,333	6,872	3,000	90,442	58,020

Freight Assistance Shipments Claims filed for payment under the freight assistance plan up to October 31 represent shipments of 1.8 million bushels of wheat from the Prairie Provinces to Eastern Canada and British Columbia during the first two months of the current crop year. Revised data for the August-September period of 1950-51 indicate that freight-assisted wheat shipments for the comparable period last year were 2.7 million bushels. The difference currently existing between the shipments recorded for the two periods will be lessened with the filing of additional claims for payment on wheat shipped under the plan during August and September, 1951. In both periods under review the bulk of the shipments went to destinations in Quebec and Ontario.

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 ...	2	27	52	45	452	375	96	1,051
September	1	11	38	27	328	363	-	767
Totals	3	38	91	71	780	738	96	1,818
Same period 1950-51	8	56	138	85	1,138	856	461	2,742

Preliminary data on millfeed shipments from August 1 to September 30, 1951 under the freight assistance plan indicate shipments of 46,704 tons as against a revised total of 95,302 tons for the first two months of 1950-51. As with wheat shipments, however, fairly substantial increases in current crop-year shipments may be expected with the filing of additional claims. An indication of the possible size of the revision is given by the fact that by October 30, 1950 claims for only two-thirds of last year's August-September millfeed shipments had been filed.

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

Province	August 1 to September 30, 1951	August 1 to September 30, 1950
- tons -		
Newfoundland	243	591
Prince Edward Island	748	2,193
Nova Scotia	3,702	8,874
New Brunswick	2,934	6,490
Quebec	24,231	45,430
Ontario	12,802	23,316
British Columbia	2,044	8,408
Totals	46,704	95,302

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 1/ of Canadian Wheat for Domestic Use and Grinding in Bond	Customs 2/ Exports of Canadian Wheat Flour	Total	Customs 2/ Exports of Canadian Wheat and Wheat Flour
- 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 4/</u>					
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	4,813	30,313	25,968
July	25,662	2,062	4,163	31,887	33,097
Totals	164,736	20,303	55,921	240,960	236,624
<u>1951-52 4/</u>					
August	16,921	2,240	3,141	22,302	27,182
September	16,726	2,376	2,206	21,308	22,161
October	23,764	3,830	3,893	31,487	24,212
Totals	57,411	8,447	9,241	75,099	73,555

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 correspondents.

2/ Exports for crop years 1949-50 and 1950-51 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
October and August—October, 1951

Destination	October		August—October	
	Wheat Flour <u>1/</u>	Wheat <u>2/</u>	Wheat Flour <u>1/</u>	Wheat <u>2/</u>
	- bushels -		- bushels -	
<u>COMMONWEALTH COUNTRIES</u>				
United Kingdom	1,900,193	7,423,760	2,636,712	23,547,600
<u>Africa</u>				
Rhodesia	-	3,733	-	3,733
Union of South Africa	-	-	-	416,080
<u>British West Africa</u>				
Gold Coast	23,319	-	65,326	-
Nigeria	14,440	-	23,197	-
Sierra Leone	3,442	-	12,973	-
<u>Asia</u>				
British Malaya	-	-	2,295	-
Ceylon	-	-	77,216	-
Hong Kong	81,823	-	313,767	-
India	-	991,947	90	991,947
<u>Europe</u>				
Gibraltar	14,301	-	51,345	-
Malta	-	350,933	-	377,068
<u>North America</u>				
Bahamas	28,652	-	64,116	-
Barbados	46,503	-	105,359	775
Bermuda	7,564	-	24,034	-
British Honduras	4,626	-	14,625	-
Jamaica	46,440	-	372,586	-
Leeward-Windward Is.	78,930	-	215,465	-
Trinidad and Tobago	225,077	-	516,812	-
<u>South America</u>				
British Guiana	99,563	-	211,793	-
<hr/>				
Totals, Commonwealth Countries	2,574,873	8,770,373	4,707,711	25,337,203

Exports of Canadian Wheat and Wheat Flour
October and August—October, 1951

Destination	October		August—October	
	Wheat Flour 1/	Wheat 2/	Wheat Flour 1/	Wheat 2/
	- bushels -		- bushels -	
<u>FOREIGN COUNTRIES</u>				
<u>Africa</u>				
Azores and Madeira	7,564	-	10,966	-
Belgian Congo	64,553	-	118,382	-
Canary Islands	-	-	25,214	-
Egypt	-	-	-	424,015
French Africa	-	1,012,932	-	1,012,932
Liberia	2,065	-	2,925	-
Morocco	69,610	-	156,789	-
Portuguese Africa	3,672	-	13,644	-
Tripoli	-	-	-	407,847
<u>Asia</u>				
Arabia	2,578	-	2,578	-
Indonesia	-	-	3,901	-
Iraq	-	-	513	-
Israel	-	300,000	-	300,000
Japan	54,729	742,196	126,018	2,067,087
Philippine Islands	490,527	-	752,324	-
Portuguese Asia	-	-	9,180	-
Siam	9,527	-	24,953	-
Syria	93,240	733,969	176,544	733,969
<u>Europe</u>				
Belgium	-	2,042,108	-	5,627,786
Denmark	-	537,600	-	537,600
France	1,606	722,400	1,606	1,622,471
Germany	-	1,838,625	82,260	1,858,225
Greece	-	-	112	-
Iceland	17,955	-	29,065	-
Ireland	-	415,037	-	2,141,552
Italy	10,903	736,400	503,379	1,848,077
Netherlands	-	1,409,029	-	4,679,383
Norway	-	395,062	6,075	945,729
Portugal	6,646	-	6,646	-
Spain	-	304,500	-	304,500
Sweden	-	-	-	590,133
Switzerland	-	1,033,331	-	2,497,075
Yugoslavia	5,738	377,500	13,770	377,500
<u>North America</u>				
Costa Rica	18,518	12,600	127,472	29,267
Cuba	80,658	500	649,746	500
Dominican Republic	13,559	1,400	38,228	1,400
El Salvador	13,356	-	60,660	-

Exports of Canadian Wheat and Wheat Flour
October and August—October, 1951

Destination	October		August—October	
	Wheat Flour 1/	Wheat 2/	Wheat Flour 1/	Wheat 2/
	- bushels -		- bushels -	
<u>FOREIGN COUNTRIES</u>				
<u>North America</u>				
French West Indies	130	-	760	-
Guatemala	28,652	-	73,346	-
Haiti	7,204	-	71,086	-
Honduras	-	6,666	230	6,666
Netherlands Antilles	12,506	-	34,223	-
Nicaragua	26,564	-	40,113	-
Panama	28,044	-	61,528	-
St. Pierre-Miquelon	1,814	-	5,747	-
United States				
Flour in terms of wheat	21,290	-	209,084	-
For grinding in bond 3/	-	551,662	-	624,079
For domestic use 3/	-	3,278,583	-	7,822,659
Virgin Islands	392	-	5,049	-
<u>South America</u>				
Bolivia	-	292,694	-	292,694
Brazil	-	1,233,844	-	2,559,946
Chile	-	746,667	-	1,108,800
Colombia	12,190	19,972	49,923	19,972
Ecuador	22,680	-	79,115	-
Peru	-	78,773	-	78,773
Surinam	8,343	-	23,989	-
Venezuela	181,143	-	935,766	-
Totals,				
Foreign Countries	1,317,956	18,824,050	4,532,909	40,520,637
Grand Totals	3,892,829	27,594,423	9,240,620	65,857,840

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.

Exports of Canadian Wheat and Wheat Flour
Crop Year 1950-51

Destination	Wheat <u>1/</u>	Wheat Flour <u>2/</u>	Total Wheat <u>1/</u> and Wheat Flour <u>2/</u>
	bu.	bu.	bu.
<u>COMMONWEALTH COUNTRIES</u>			
United Kingdom	78,139,576	23,416,691	101,556,267
<u>Africa</u>			
British East Africa	-	2,295	2,295
Union of South Africa	7,899,095	-	7,899,095
<u>British West Africa</u>			
Gambia	-	2,776	2,776
Gold Coast	-	265,063	265,063
Nigeria	-	52,344	52,344
Sierra Leone	-	64,845	64,845
<u>Asia</u>			
British Malaya	-	648,954	648,954
Ceylon	-	334,364	334,364
Hong Kong	-	1,312,538	1,312,538
India	11,403,285	-	11,403,285
<u>Europe</u>			
Gibraltar	-	242,568	242,568
Malta	1,105,766	285,628	1,391,394
<u>North America</u>			
Bahamas	-	245,862	245,862
Barbados	933	413,995	414,928
Bermuda	-	118,170	118,170
British Honduras	34,136	67,163	101,299
Jamaica	-	1,519,402	1,519,402
Leeward-Windward Islands	-	898,272	898,272
Trinidad and Tobago	-	2,211,602	2,211,602
<u>South America</u>			
British Guiana	-	857,718	857,718
Totals, Commonwealth Countries	98,582,791	32,960,250	131,543,041

Exports of Canadian Wheat and Wheat Flour

Destination	Wheat 1/	Wheat Flour 2/	Total Wheat 1/ and Wheat Flour 2/
	bu.	bu.	bu.
<u>FOREIGN COUNTRIES</u>			
<u>Africa</u>			
Azores and Madeira	-	41,202	41,202
Belgian Congo	3,674	236,889	240,563
Canary Islands	-	64,165	64,165
Egypt	-	87,462	87,462
French Africa	18,454	23,175	41,629
Liberia	-	14,206	14,206
Morocco	-	390,654	390,654
Portuguese Africa	-	163,539	163,539
Spanish Africa	-	25,254	25,254
Tripoli	625,223	-	625,223
<u>Asia</u>			
Arabia	45,119	144,104	189,223
China	-	59,054	59,054
Indonesia	-	535,261	535,261
Israel	2,029,626	285,089	2,314,715
Japan	11,471,357	634,581	12,105,938
Jordan	-	38,561	38,561
Philippine Islands	-	4,343,463	4,343,463
Siam	-	177,246	177,246
Syria	-	628,938	628,938
Turkey	367,125	-	367,125
<u>Europe</u>			
Belgium	16,693,208	878	16,694,086
France	600,712	995	601,707
Germany	62,902	410,220	473,122
Greece	-	5,139	5,139
Iceland	-	139,068	139,068
Ireland	4,718,843	-	4,718,843
Italy	12,379,956	4,047,993	16,427,949
Netherlands	1,172,871	1,130	1,174,001
Norway	3,042,693	300,434	3,343,127
Portugal	251,979	60,273	312,252
Spain	1,331,107	-	1,331,107
Switzerland	5,868,382	1,606	5,869,988
Yugoslavia	-	66,713	66,713
<u>North America</u>			
Alaska	-	2,695	2,695
Costa Rica	93,334	491,571	584,905
Cuba	14,041	2,575,899	2,589,940
Dominican Republic	7,200	312,318	319,518
El Salvador	20,000	192,258	212,258
French West Indies	-	7,497	7,497

Exports of Canadian Wheat and Wheat Flour

Destination	Wheat <u>1/</u>	Wheat Flour <u>2/</u>	Total Wheat <u>1/</u> and Wheat Flour <u>2/</u>
	bu.	bu.	bu.
<u>FOREIGN COUNTRIES</u>			
<u>North America</u>			
Guatemala	-	362,533	362,533
Haiti	-	330,268	330,268
Honduras	15,380	23,179	38,559
Netherlands Antilles	-	207,967	207,967
Nicaragua	-	106,020	106,020
Panama	-	263,844	263,844
St. Pierre-Miquelon	-	19,773	19,773
United States			
Flour in terms of wheat	-	901,125	901,125
For grinding in bond <u>3/</u>	5,461,836	-	5,461,836
For domestic use <u>3/</u>	14,841,533	-	14,841,533
Virgin Islands	-	17,428	17,428
<u>Oceania</u>			
Guam	-	918	918
<u>South America</u>			
Bolivia	716,167	1,148	717,315
Brazil	377,066	-	377,066
Chile	2,500,444	-	2,500,444
Colombia	1,504,126	491,607	1,995,733
Ecuador	141,818	413,392	555,210
Peru	75,627	56,984	132,611
Surinam	-	186,219	186,219
Venezuela	4,770	3,069,297	3,074,067
Totals, Foreign Countries	86,456,573	22,961,232	109,417,805
Grand Totals, Exported	185,039,364	55,921,482	240,960,846

1/ Overseas clearances as reported by the Statistics Branch of the Board of Grain Commissioners, for all countries except the United States.

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

3/ Compiled from returns of Canadian elevator licensees 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			
	Oct. 27	Nov. 3	Nov. 10	Nov. 17
- 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> (International Wheat Agreement)				
1 Hard	188/6	188/3	188	188/1
1 Northern	188/6	188/3	188	188/1
2 Northern	186/6	186/3	186	186/1
3 Northern	184/6	184/3	184	184/1
4 Northern	178/6	178/3	178	178/1
5 Wheat	166/6	167/5	169/4	172/1
6 Wheat	156/6	157/5	159/4	161/6
Feed Wheat	150/6	151/5	153/4	155/6
1 C.W. Garnet	185/6	185/3	185	185/5
2 C.W. Garnet	184/6	184/3	184	184/5
3 C.W. Garnet	180/6	180/3	180	181/1
1 Alberta Red Winter	188/6	188/3	188	188/1
2 Alberta Winter	186/6	186/3	186	186/1
3 Alberta Winter	181/6	181/3	181	182/5
1 C.W. Amber Durum	188/6	188/3	188	188/1
2 C.W. Amber Durum	186/6	186/3	186	186/1
3 C.W. Amber Durum	184/6	184/3	184/3	185/1
<u>Export - Class II</u>				
1 Hard	239/6	240/1	241/4	243/6
1 Northern	239/6	240/1	241/4	243/6
2 Northern	237/6	238/1	239/4	241/6
3 Northern	235/6	236/1	237/4	239/6
4 Northern	229/6	230/1	231/4	233/6
5 Wheat	172/6	173/5	175/4	178/1
6 Wheat	162/6	163/5	165/4	167/6
Feed Wheat	156/6	157/5	159/4	161/6
1 C.W. Amber Durum	239/6	240/1	241/4	243/6
2 C.W. Amber Durum	237/6	238/1	239/4	241/6
3 C.W. Amber Durum	235/6	236/1	237/7	240/6

1/ Plus 6 cents carrying charge.

CANADIAN FLOUR MILLING SITUATION

Production Wheat flour production reported by Canadian mills for October 1951 amounted to 1.9 million barrels compared with 2.1 million for the same month last year and 1.8 million for September 1951. Mills reporting operations during October this year had a rated capacity of 97,674 barrels and, on the basis of a 26-day working period, 75.9 per cent of this capacity was effective. Mill grindings during the month totalled 8.8 million bushels of wheat as against 9.5 million in October last year and 8.2 million in September 1951.

Exports Exports of Canadian wheat flour during October, according to preliminary Customs returns, amounted to 865,073 barrels (3.9 million bushels of wheat equivalent), well above shipments in the two previous months. Almost half the October exports, amounting to some 1.9 million bushels of wheat equivalent, went to the United Kingdom. Other shipments in excess of 100,000 bushels of wheat equivalent went to the Philippine Islands (490,527), Trinidad and Tobago (225,077) and Venezuela (181,143). Shipments of Canadian wheat flour during October 1951 went to destinations in 46 countries and colonies.

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

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	87,819,472	19,575,833	10,288,827
1941-42	89,315,195	19,905,741	10,205,778
1942-43	105,010,822	23,590,516	12,575,215
1943-44	107,140,749	24,303,833	13,464,371
1944-45	109,236,954	24,634,905	13,923,832
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	106,703,533 ^{2/}	23,620,600 ^{2/}	12,426,996
1951-52			
August	7,747,885 ^{2/}	1,699,569 ^{2/}	698,082
September	8,173,807 ^{2/}	1,797,624 ^{2/}	490,316
October	8,832,670 ^{2/}	1,926,302 ^{2/}	865,073
Totals	24,754,362 ^{2/}	5,423,495 ^{2/}	2,053,471

^{1/} Based on Customs returns. Exports for the crop years 1945-46 to 1950-51 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 Exports of United States wheat continue in heavy volume, with 136.2 million bushels of wheat as grain moving into export channels in the four months ending October 31, 1951. In addition, exports of wheat flour and macaroni in terms of wheat equivalent during the same four-month period amounted to 13.9 million bushels, bringing total exports of wheat and wheat products to 150.1 million bushels. Total exports for the comparable period in 1950-51 were 70.9 million bushels, less than half the current year's level. The balance remaining on November 1 for export and carryover was estimated at 500.4 million bushels as against 647.7 million a year ago.

United States Wheat Supplies

Item	1951-52 <u>1/</u>	1950-51
	- million bushels -	
Carryover at July 1	395.0	426.8
New crop	993.6 <u>2/</u>	1,026.8
Total estimated domestic supplies	1,388.6	1,453.6
Imports of wheat for domestic use, July—October	9.9	0.2
Total estimated supplies <u>3/</u>	1,398.5	1,453.8
Less estimated domestic requirements for crop year <u>4/</u>	748.0	705.2
Available for export and carryover	650.5	748.6
Deduct:		
Exports of wheat as grain, July—October	136.2	59.5
Exports of wheat flour and macaroni in terms of wheat, July—October	13.9	11.4
Total exports of wheat, wheat flour and macaroni	150.1	70.9
Balance on November 1 for export and carryover	500.4	647.7

1/ Preliminary.

2/ Official estimate as of October 1, 1951.

3/ Excluding imports for November—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.

The Outlook for The following statement on the outlook for wheat in 1952-53 was
Wheat in 1952-53 presented at the 29th Annual Agricultural Outlook Conference, Washington, D.C., on November 1, 1951 by Robert E. Post, Agricultural Economic Statistician.

"With prices to be supported at a minimum of \$2.17 per bushel, farmers are likely to produce enough wheat in 1952 to meet domestic and export requirements in 1952-53 and provide for an increase in the carryover at the end of the marketing year. This assumes, of course, average growing conditions.

The Wheat Situation in
the Current 1951-52 Year

In the current marketing year, less wheat was produced than is likely to be used in this country and exported. The carryover on July 1, 1952, is expected to be about 335 million bushels, or 60 million bushels below the July 1951 figure.

The 335 million-bushel figure for July 1, 1952 is larger than the figure carried in the outlook issue of The Demand and Price Situation. The October 1 stocks figure, which became available on October 25, together with estimates of disappearance, indicates that a much smaller quantity was fed in July-September than had been previously expected. This made it desirable to lower our sights on wheat feeding for the marketing year, and change the estimate of carryover July 1, 1952 from 300 million bushels to 335 million. It should be pointed out, however, that the quantity to be fed in the 1951-52 year, now estimated at 130 million bushels, will depend upon the quantity of damaged wheat in our domestic supply available for feeding as well as the quantity of feeding-grade wheat imported from Canada and could be more than the current estimate.

Prices for the 1951 crop are expected to average near or slightly below the support price of \$2.18 per bushel. During the early part of the marketing year, prices have been below the support, but recently they have advanced to above that level.

The Supply Outlook
for the Marketing Year
beginning July 1, 1952

A national wheat goal for 1952 of 78.9 million acres was announced on July 13. This allowed ample time for farmers to plan their fall seedings. This goal acreage is slightly above the big acreage of 78.5 million acres seeded for the 1951 crop, and has been exceeded by seedings in only four years in our history.

If yields for next year's wheat crop are average, the 78.9 million goal acreage would result in a crop of 1,165 million bushels, 17 per cent above estimated production this year, when yields were below average. It is likely that the goal acreage will be fully met, if not exceeded. Reports from local PMA committees indicate seedings of wheat may slightly exceed the goal. A crop of about 1,165 million bushels and a carryover of old wheat on July 1, 1952 estimated at about 335 million bushels, would provide 1,500 million bushels of domestic wheat for 1952-53. Use of wheat in the United States in 1952-53 is forecast at about 745 million bushels. Assuming exports at 325 million—moderately less than expected for 1951-52—the carryover on July 1, 1953 would be about 430 million bushels. This would be about 100 million bushels more than is expected to be carried over next July 1.

The Prospective
Export Situation

Exports in 1952-53 are expected to be less than the 366 million bushels in 1950-51. The United States export quota under the International Wheat Agreement is about 250 million bushels per year. Exports of non-agreement wheat in 1952-53 are not expected to be as large as in 1950-51 when they totalled about 115 million bushels. In 1950-51 the quantity of contract-grade export wheat in Canada was limited as a result of frost damage. In addition marketing and transportation difficulties in Canada interfered with the export movement. Exports of United States wheat in 1950-51, especially during the last half of the year also were stimulated by the desire of importing countries to increase their reserves because of the international situation and inflation. Furthermore, extraordinary demands, such as those from Yugoslavia and India, which resulted from unfavourable growing conditions in 1950 also added to the relatively

high level of U. S. wheat exports in 1950-51. The impact of this demand is being carried over into the 1951-52 season in the case of India.

Demand for U. S. wheat from the important deficit areas of the Far East in 1952-53 will depend in part upon the extent to which rice continues to be available. Stocks of rice in these areas at the beginning of the 1951 marketing year were very small and production indicated for 1951 is not large enough to improve the stocks position by the beginning of the 1952 marketing year. Accordingly, any improvement in the situation will need to come from 1952 rice production. This is not promising. The only country in which a marked short-term increase in production could take place is Indo-China, and this is dependent upon improvement in the internal situation in that country. Rice production in the United States in 1952 is expected to continue at high levels, with some increase in the level of rice exports from the United States possible.

The International Wheat Agreement ends with the conclusion of the 1952-53 year and the question of extension will be considered in coming months. During the first two years of the Agreement, exports of wheat and flour have been maintained at a higher level than would have been possible in the absence of the Agreement or a similar export program.

The Price Outlook for the 1952 Crop The price to growers for the 1952 wheat crop is expected to average near the support level established at the beginning of the marketing year. A minimum support price of \$2.17—about the same as for the 1951 crop—was announced by the Secretary of Agriculture on August 29. This was 90 per cent of the mid-July parity price. If 90 per cent of parity at the beginning of the marketing year is higher, the support will be raised to that level. As was the case in 1951, no allowance for farm storage or warehouse storage charges will be available to producers who deliver loan wheat from the 1952 crop to CCC.

On June 29 Secretary Brannan announced that there would be no marketing quotas on the 1952 wheat crop."

Flour Production In a report released on November 15 the Bureau of the Census, Department of Commerce, estimated September wheat flour production at 18,795,000 sacks. Although total production was slightly lower than the preceding month, the daily average production in September with fewer working days was 989,000 sacks, compared with a daily average of 854,000 sacks in August, and 940,000 sacks in September 1950. Wheat flour mills in September operated at 88.5 per cent of capacity, compared with 76.3 per cent in August.

Wheat flour mills in September ground 43,789,000 bushels of wheat; offal production was estimated at 378,000 tons.

Mill stocks of wheat flour at the end of the third quarter amounted to 4,712,000 sacks, compared with 4,494,000 sacks at the end of June, and 4,968,000 sacks at the end of the third quarter of last year.

These figures represent the production of all commercial flour mills in the United States. About 97 per cent of the totals are reported by the 375 largest mills, and the balance estimated. The estimated portion is derived from an annual survey of the smaller mills.

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
October 24, 1951	248 1/2 - 249 1/2	October 24, 1951	245 1/8 - 248 1/8
25	245 3/4 - 250 1/4	25	245 1/8 - 248 1/8
26	247 - 248 3/4	26	243 5/8 - 246 5/8
27	243 - 248	27	242 7/8 - 245 7/8
29	244 3/4 - 254 1/2	29	243 - 246
30	242 3/4 - 253 1/2	30	243 3/8 - 246 3/8
31	246 1/4 - 248 1/2	31	242 1/4 - 245 1/4
November 1	246 - 251 1/2	November 1	241 1/8 - 244 1/8
2	248 - 252 1/2	2	243 5/8 - 246 5/8
3	248 3/4 - 251 1/2	3	244 1/4 - 247 1/4
5	248 1/4 - 257	5	244 - 247
6	246 - 256 3/4	6	245 3/8 - 248 3/8
7	251 1/4 - 251 3/4	7	245 3/4 - 248 3/4
8	251 - 251 1/2	8	246 7/8 - 249 7/8
9	249 1/2 - 267	9	249 - 252
10	248 1/2 - 267	10	247 5/8 - 250 5/8
12	Market Closed	12	Market Closed
13	251 - 257 3/4	13	247 5/8 - 250 5/8
14	253 3/4 - 256 3/4	14	248 - 251
15	253 3/4 - 254 3/4	15	248 3/8 - 251 3/8
16	251 1/4 - 255	16	249 3/4 - 252 3/4
17	253	17	248 - 251
19	252 - 256	19	248 3/8 - 251 3/8
20	252 3/4 - 258 1/2	20	247 1/8 - 250 1/8
21	253 - 253 1/2	21	247 3/4 - 250 3/4
22	Thanksgiving Day	22	Thanksgiving Day

Chicago Wheat Futures, High Points of Closing

Date	December	March	May	July	September
	- cents and eighths per bushel -				
October 24, 1951	254/3	257/2	255/4	246/1	
25	255/1	257/7	255/7	246/4	
26	254/4	257/4	255/5	246/2	
27	253/1	256/1	254	244/1	
29	253/4	256/4	254/3	244/4	
30	253/5	256/3	254/3	244/4	
31	252/1	255/1	253/2	243/5	
November 1	251/6	254/2	252/3	242/6	
2	254/3	256/7	254/5	244/6	
3	255/1	257/7	255/6	245/7	
5	254/7	257/7	255/4	246/3	
6	256/3	259/3	256/7	247/5	
7	256	259	256/2	246/1	
8	257/3	260	256/7	246/6	
9	258/3	261/2	257/6	247/4	
10	257/4	260/3	257/3	247/6	
12			Market Closed		
13	259/6	262/6	259/3	249/6	
14	259/2	262/1	259	249	249/6
15	261	263/4	259/7	249/5	250/2
16	261/4	263/7	260/2	250/1	250/6
17	259/7	262	258/7	249	249/6
19	260/6	263/1	259/7	249/6	250/4
20	258/7	261/1	257/5	248	248/7
21	259/6	261/5	258/6	249	249/6
22			Thanksgiving Day		

ARGENTINE SITUATION

Supply Position Exports of wheat and wheat flour in terms of wheat from the Argentine during the eleven months ending October 31, 1951 amounted to 92.2 million bushels, only slightly below the total for the comparable period of 1949-50. The balance remaining on November 1 for export and carryover was estimated at 10.7 million bushels as against 12.6 million on the same date last year. In view of the small stocks available for carryover at November 30 and the prospects of a sharply reduced crop, supplies of Argentine wheat available for export in 1951-52 are expected to be very limited.

Argentine Wheat Supplies

Item	1950-51 <u>1/</u>	1949-50 <u>2/</u>
- million bushels -		
Carryover at beginning of crop year (December 1)	7.3	44.1
New crop	213.1	189.0
Total estimated supplies	220.4	233.1
Less estimated domestic requirements for crop year	117.6	125.4
Available for export and carryover	102.8	107.7
Deduct:		
Exports of wheat as grain, December 1—October 31	91.1	95.0
Exports of wheat flour in terms of wheat, December 1—October 31	1.1	0.1
Total exports of wheat and wheat flour	92.2	95.1
Balance on November 1 for export and carryover	10.7	12.6

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

2/ Revised.

The following account of the Argentine grain situation has been extracted from a report from Mr. W. B. McCullough, Commercial Secretary (Agricultural) at Buenos Aires, under date of November 15, 1951, and is reproduced with the kind permission of the Trade Commissioner Service. 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 Over the past few weeks light and moderate rains have fallen over most of the grain belt including the drought areas in the provinces of Córdoba and Santa Fé and La Pampa. On November 11 there was the heaviest rainfall in many months in the province of Buenos Aires and in many districts of the other provinces. The coastal areas of Buenos Aires province received up to 6 inches and in central districts there were up to 4 inches which is the heaviest precipitation for a long time.

The drought is considered broken and the moisture will alleviate the pasture situation which will reduce the demand for feed and offer some improvement in the export prospects for coarse grains.

Late corn and sunflower can be sown under more favourable conditions and the sowings of the latter can be expected to show an increase over last year. Sunflower normally follows wheat and as much of this crop was lost in the northern areas these fields will be sown to sunflower. Frosts on October 19 caused some damage to wheat and early sowings of corn. Pastures in the greater part of the province of Buenos Aires are in satisfactory condition and with the additional moisture will improve in other areas.

Supply Position At the end of October Argentina had about 290,000 tons (10.7 million bushels) of wheat left for export or carryover. It is anticipated that shipments for the crop year will be a little over 2.5 million tons (92 million bushels) as compared with 2.7 million (99 million bushels) last year, and the carryover at the end of the crop year, November 30, will be in the vicinity of 260,000 tons (9.6 million bushels) as compared to 200,000 (7.3 million bushels) last year.

1951-52 Wheat Crop As a result of the adverse climatic conditions the trade now forecast that the 1951-52 wheat crop will not exceed 3.5 million tons (128.6 million bushels) as against 5.8 million tons (213.1 million bushels) last year. This will leave Argentina a little more than home requirements and a negligible export surplus. The wheat crop is considered lost in the provinces of Córdoba and the greater part of Santa Fé. In the south of Santa Fé, owing to continued dry weather after seeding, only 50 per cent of the crop may be harvested. Due to a scarcity of feed in pastures, many of the wheat fields were grazed.

In 1950-51 the northern grain zone accounted for 2.3 million tons (84.5 million bushels) or 40 per cent of the country's crop. The loss of this area during the current year is the major contribution to the low forecast on wheat.

With regard to the 1950-51 wheat crop, the May issue of the "Sintesis Estadística" just released, continues to carry the estimate of 5.5 million tons (202 million bushels). However, the annual report of the Banco Central, an official institution, carries estimates on last year's crops, presumably obtained from official sources, and gives the figure of approximately 5.8 million tons (213.1 million bushels) for the crop last year. The latter figure is more in line with the trade estimates and justifies the quantities of wheat exported during the current year.

Wheat Sowings and Production

Crop Year	Area Sown	Production	Crop Year	Area Sown	Production
	000 acres	000 bu.		000 acres	000 bu.
1940-41 ...	17,499	299,461	1946-47 ...	16,484	206,316
1941-42 ...	18,031	238,353	1947-48 ...	13,461	238,834
1942-43 ...	16,976	235,160	1948-49 ...	14,340	191,067
1943-44 ...	16,824	249,857	1949-50 ...	14,059	189,010
1944-45 ...	15,394	150,109	1950-51 ...	16,188	212,967 ^{1/}
1945-46 ...	14,232	143,558	1951-52 ^{2/}	11,115	128,603

^{1/} Central Bank estimate. ^{2/} Trade estimate.

Bonus for Wheat The Argentine Government recently announced that owing to adverse climatic conditions that affected the current wheat crop, I.A.P.I. will pay an additional bonus on wheat harvested in the drought stricken areas.

(1) I.A.P.I. will absorb 50 per cent of the discount for below standard grade wheat. The fixed price of 34.00 pesos per 100 kilos (\$1.85 per bushel) is on the basis of 78 kilos per hectolitre with bonuses or discounts from this grade.

(2) A bonus of 5.00 pesos per 100 kilos (27 cents per bushel) will be paid for wheat proceeding from the provinces of Córdoba and La Pampa and seven specified northern counties in the province of Santa Fé.

(3) A bonus of 3.00 pesos per 100 kilos (16 cents per bushel) will be paid for wheat proceeding from the province of Entre Rios and nine specified countries south of the province of Santa Fé and forty-six counties northwest of the province of Buenos Aires.

Producers' Prices for Argentine Grain

	1951-52	1950-51	1949-50	1948-49	1947-48	1946-47
	- pesos per 100 kilos -					
Wheat.....	34.00	30.50	23.50	23.00	20.00	17.00
Corn	30.00	32.82*	16.00	15.80	14.00	12.00
Flax	50.00	41.00	34.00	30.00	30.00	30.00
Rye	28.00	23.50	16.50	17.50	17.50	14.84
Oats	25.50	21.00	14.00	16.00	16.00	13.73
Barley	29.50	23.50	17.00	15.00	13.50	13.50
Sunflower	34.00	29.50	29.00	29.00	28.00	23.00

* Price includes bonus of 5.00 pesos announced on June 8 and .82 pesos to cover extra cost of bags.

Grain Exports Argentina's shipments of grain for the month of October at 212,222 tons were the lowest for any month this year and over 8,000 tons below the previous low established in September. During the first ten months of this year Argentina's grain shipments totalled 3,036,667 tons as against 3,878,994 tons for the same period in 1950. The figure for this year compares favourably with shipments in 1949 which was one of the worst grain years in Argentina's modern history, but it is over 1.6 million tons less than the 1948 figure. A comparison of grain shipments for the first ten months is shown for the years indicated in the following table:

Argentine Grain Shipments, January—October, 1948—1951

Crop	1951	1950	1949	1948
	- thousand bushels -			
Wheat	85,544	90,414	56,868	71,035
Corn	8,004	30,965	31,987	76,320
Flax	6,537	2,492	1/	1/
Oats	5,113	21,565	8,153	5,041
Rye	6,985	6,192	7,114	5,149 2/
Barley	3,807	3,609	8,517	28,184

1/ Exports of flax unprocessed prohibited.

2/ Approximate figure.

A comparison of the monthly shipments of grain from Argentina follows:

Argentine Grain Shipments, 1951

Month	Wheat	Corn	Flax	Oats	Rye	Barley
- thousand bushels -						
October	4,618	2,458	59	581	-	625
September	4,476	2,007	79	633	4	1,648
August	7,139	1,701	446	318	40	718
July	6,973	765	239	1,481	117	494
June	11,688	39	721	330	1,613	-
May	8,271	605	677	389	1,042	-
April	13,116	59	1,039	71	2,492	46
March	11,788	220	1,237	826	1,438	-
February	8,973	-	971	329	141	276
January	8,500	150	1,070	155	98	-
Totals	85,544	8,004	6,537	5,113	6,985	3,807

Argentine Grain Shipments, January—October, 1951

Destination	Wheat	Corn	Flax	Oats	Rye	Barley
- thousand bushels -						
Austria	-	-	-	-	321	-
Belgium	1,733	790	626	313	699	964
Brazil	29,261	-	-	77	-	46
Chile	1,213	-	69	-	-	-
Czechoslovakia	-	-	-	-	390	-
Denmark	-	-	-	-	574	-
Egypt	563	-	-	-	-	-
Finland	-	131	37	-	1,220	-
France	1,505	4,975	2,371	-	-	-
French Africa	3,088	39	-	-	-	-
Germany	4,510	387	90	1,018	1,872	1,799
Holland	1,579	520	985	1,523	1,740	648
India	18,030	-	-	-	-	-
Italy	15,234	-	260	-	-	139
Norway	-	-	411	195	-	-
Paraguay	1,700	-	-	-	-	-
Peru	2,332	-	-	-	-	-
Portugal	-	-	236	-	-	-
Spain	-	-	154	-	-	-
Sweden	1,102	3	118	529	166	-
Switzerland	1,931	997	217	706	-	211
United Kingdom	1,764	162	965	529	4	-
Uruguay	-	-	-	223	-	-
Totals	85,544	8,004	6,537	5,113	6,985	3,807

URUGUAYAN SITUATION

Mr. McCullough has also forwarded the following report on grain acreages and production in Uruguay.

According to the first official estimate, the area seeded to wheat in Uruguay in 1951-52 is 531,204 hectares (1.3 million acres), an increase of 7 per cent over the previous year. If this estimate is confirmed, the area to wheat will be one of the country's largest, surpassed only in 1937-38. There has been no forecast as to production and although it was reported that the condition of all grain crops in Uruguay was excellent up until late September, the frost of October 19 followed by a heavy rain storm on November 11 probably has caused some damage.

Flax sowings are estimated at 144,492 hectares (357,000 acres) or 7 per cent less than the previous season.

The following tables show the area sown to grain in Uruguay for the years 1945-46 to 1951-52 with corresponding production figures:

Area Sown

Crop	1951-52 <u>1/</u>	1950-51	1949-50	1948-49	1947-48	1946-47	1945-46
- thousand acres -							
Wheat	1,312	1,224	1,276	1,279	1,247	917	875
Flax	357	386	394	619	551	369	592
Oats	170	158	273	205	160	168	177
Barley ...	59	67	81	78	52	56	60
Rye	1	1	1	<u>2/</u>	1	1	1

1/ First official estimate.

2/ Less than 500 bushels.

Production

Crop	1951-52 <u>1/</u>	1950-51	1949-50	1948-49	1947-48	1946-47	1945-46
- thousand bushels -							
Wheat		15,974	16,607	19,044	15,563	6,681	7,959
Flax		3,543	2,939	4,596	3,863	2,843	5,159
Oats		2,215	3,834	3,307	2,436	1,327	2,438
Barley ...		1,131	1,240	1,181	521	526	748
Rye		5	7	3	6	3	7

1/ No estimates available.

AUSTRALIAN SITUATION

Supply Position Combined exports of Australian wheat and wheat flour in terms of wheat up to October 25 of the current crop year amounted to 120.0 million bushels as against 106.6 million for the comparable period of 1949-50. Of the 80.1 million bushels of the current crop-year total exported in the form of grain, 19.0 million went to the United Kingdom, 14.4 million to Egypt and 11.8 million to Italy. Exports of wheat flour for the period under review totalled 742,201 long tons or 39.9 million bushels of wheat equivalent, with Ceylon, Malaya, Egypt and the United Kingdom being the principal purchasers. The balance remaining on October 26 for export and carryover at the end of the crop year (November 30) was estimated at 28.1 million bushels, compared with 52.4 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—October 25	80.1	74.4
Exports of wheat flour in terms of wheat		
December 1—October 25	39.9	32.2
Total exports of wheat and wheat flour	120.0	106.6
Balance on October 26 for export and carryover	28.1	52.4

1/ Preliminary.

Australian Cable The following cable, dated November 15, 1951, has been received from the Commercial Secretary for Canada (Agricultural) in Melbourne:

"Australian wheat stocks at October 25 totalled 32,900,000 bushels. Wheat exports from December 1, 1950 to October 25, totalled 80,079,000 bushels, with shipments during the preceding four weeks mainly to the United Kingdom, Germany, Italy. Flour exports for the same period were 742,201 long tons, with 18,045 going to Ceylon, 17,749 to Egypt, 8,856 to India, 7,209 to the United Kingdom, 4,598 to Malaya. International Wheat Agreement sales in October were one and a half million bushels of wheat to New Zealand, one-quarter million tons, including part flour to the United Kingdom, 130,000 tons, including part flour to India, 22,000 tons of wheat to Cyprus, all for delivery next year."

CALENDAR OF WHEAT EVENTS

- November 2 - The Canadian Wheat Board requested elevator companies to notify their agents at 126 stations in Saskatchewan having a freight differential of 1 cent per hundred pounds in favour of Fort William, to ship all wheat expected to grade dry 1, 2, 3 or 4 Northern to Vancouver.
- 15 - On the basis of conditions at October 31, Canada's 1951 wheat crop was estimated at 562 million bushels, second only to the record 567 million harvested in 1928. Full realization of the current estimate, however, will depend on how well the unthreshed portion of the crop withstands lengthy exposure and on the development of conditions suitable for combining and threshing in the affected areas during the winter and spring months.

The area seeded to winter wheat in Ontario in the autumn of 1951 was estimated at 892,000 acres, a decrease of 9 per cent from the 1950 area of 980,000 acres.

- 19 - The Right Hon. C. D. Howe, Minister of Trade and Commerce, announced that the net surplus in the 1950-51 wheat pool was \$104.9 million, amounting to an average final payment of 28.65 cents per bushel on the 366.2 million bushels of wheat delivered to the Canadian Wheat Board in 1950-51.

In closing out the 1950-51 wheat pool account, a total of 95.4 million bushels of wheat, valued at \$159.8 million, was transferred to the 1951-52 pool under the provisions of section 24(a) of the Canadian Wheat Board Act.

The Canadian Wheat Board requested that wheat expected to grade dry 1, 2, 3 or 4 Northern be shipped to Vancouver from 106 Saskatchewan points having a freight differential of 2 cents per hundred pounds, and 102 points having a freight differential of 3 cents per hundred pounds in favour of Fort William.

- 20 - The Grain Research Laboratory of the Board of Grain Commissioners reported that about 70 per cent of this year's western wheat was expected to grade 3 and 4 Northern, less than 1 per cent No. 1 Northern and about 7 per cent No. 2 Northern. Predicted protein content and baking strength are just above the long-time averages. Bushel weight for average samples of the first four grades of spring wheat ranged from 64.2 pounds for No. 1 Northern down to 61.2 pounds for No. 4 Northern.
- 30 - The United States Department of Agriculture reported that farmers had placed 165.3 million bushels of 1951-crop wheat under Commodity Credit Corporation price support up to October 31, 1951. Some 47.1 million bushels of the total were farm-stored.

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