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THE WHEAT REVIEW



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Department of Trade and Commerce

THE
WHEAT REVIEW

DECEMBER, 1951

Published by
Authority of the Rt. Hon. C. D. Howe,
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 December 1, 1951 in the four major exporting countries for export and carryover at the end of their respective crop years amounted to 996 million bushels, down somewhat from the 1,065 million available a year ago. The larger supplies available from Canada have not been great enough to offset entirely the sharp decline in United States supplies while, in addition, the combined supplies available from the Argentine and Australia (which at December 1 consisted of the carryover at the end of the Southern Hemisphere crop year) were also below last year's level.

Supplies at December 1 this year (to nearest million bushels) were held as follows, with last year's figures in brackets: Canada, 485 (355); United States, 484 (661); Australia, 19 (42); and Argentina, 8 (7). Data for all countries include both commercial and farm stocks.

Large World Breadgrain Crop Confirmed The 1951 world breadgrain crop is still estimated to be a near-record one, based on latest information available to the Office of Foreign Agricultural Relations of the United States Department of Agriculture. A net decrease of about 1.5 million short tons is indicated in overall production compared with the earlier forecast published in the September issue of 'The Wheat Review.' This brings the estimated total to 243.5 million short tons, with some decrease in the wheat crop only partly offset by increased rye production. A good part of the reduction is in estimates for the Southern Hemisphere, where unfavourable weather reduced prospects during the latter part of the growing season.

The world wheat crop, now estimated at 6,550 million bushels, is above the prewar average and a little larger than the 1950 harvest, despite a reduction of about 100 million bushels from the September forecast. European wheat production is estimated at 1,580 million bushels, a slight increase over the previous estimate and only slightly below the prewar average. Increases from the earlier estimate were mainly attributed to better outturns than had been expected in Central Europe and Spain. In the Soviet Union a substantial increase reported in wheat acreage, together with good early-season prospects, led to expectations of a larger wheat crop than that of 1950. More recent information of summer dryness in some regions indicates less optimistic yields than had seemed likely but in view of the substantially increased acreage, which appears to have been partly at the expense of rye, wheat production still should be somewhat larger than last year's harvest.

In general, however, crops in the world's traditionally deficit areas were not large and since current exportable supplies are largely concentrated in North America, demand for these stocks will likely remain strong. This situation will persist for some time to come as the new crops in the Southern Hemisphere, particularly in the Argentine, are relatively small and cannot add greatly to the world's exportable surplus.

International Wheat Agreement Sales and Purchases Transactions under the I.W.A. recorded by the International Wheat Council up to December 14 (except for Canadian sales which were reported up to December 18) totalled 362.7 million bushels or about 62 per cent of the 1951-52 guaranteed quantities. Details of transactions are set out in the following table.

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

Importing Countries	Guaranteed Quantities	Source				Total Purchases
		Canada <u>1/</u>	Australia <u>2/</u>	France <u>2/</u>	U.S.A. <u>2/</u>	
- thousand bushels -						
Austria	11,023	-	-	73	4,727	4,800
Belgium	20,209	10,651	-	-	6,429	17,080
Bolivia <u>3/</u>	2,756	2,033	-	-	766	2,799
Brazil <u>3/</u>	13,228	2,461	-	-	10,771	13,232
Ceylon <u>3/</u>	6,614	-	5,166	-	1,448	6,614
Costa Rica <u>3/</u>	1,213	777	-	-	430	1,207
Cuba	7,422	3,935	-	-	3,463	7,398
Denmark <u>3/</u>	1,617	538	-	-	1,103	1,641
Dominican Republic <u>3/</u> ..	876	511	-	-	348	859
Ecuador <u>3/</u>	1,286	470	-	-	831	1,301
Egypt	14,697	-	-	-	4,569	4,569
El Salvador <u>3/</u>	404	173	-	-	234	407
Germany	66,139	4	2,904	1,286	33,502	37,696
Greece	15,726	30	-	-	10,927	10,957
Guatemala <u>4/</u>	919	177	-	-	301	478
Haiti <u>3/</u>	1,029	419	-	-	684	1,103
Honduras Republic <u>3/</u> ..	367	170	-	-	197	367
Iceland	404	70	-	-	97	167
India	55,116	14,933	10,014	-	24,539	49,486
Indonesia	3,674	18	1,440	-	1,502	2,960
Ireland	10,104	5,227	1,628	-	366	7,221
Israel	5,879	965	-	-	2,001	2,966
Italy	40,418	9,053	3,879	-	8,794	21,726
Japan	18,372	3,414	-	-	4,166	7,580
Lebanon <u>3/</u>	2,388	8	-	-	2,441	2,449
Liberia <u>3/</u>	37	25	-	-	11	36
Mexico	12,860	-	-	-	12,761	12,761
Netherlands	24,802	6,787	2,856	-	12,965	22,608
New Zealand	4,593	-	4,535	-	-	4,535
Nicaragua <u>3/</u>	331	195	-	-	127	322
Norway <u>3/</u>	7,716	2,987	-	-	4,741	7,728
Panama <u>3/</u>	625	303	-	-	321	624
Peru <u>3/</u>	5,512	3,165	-	-	2,448	5,613
Philippines	7,202	1,772	3	-	1,405	3,180
Portugal	5,626	250	138	-	2,940	3,328
Saudi Arabia	1,837	-	52	-	555	607
Spain	4,373	-	-	-	-	-
Sweden	2,756	-	1,493	-	1,063	2,556
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	31,267	28,465	-	13,165	72,897
Venezuela <u>3/</u>	6,246	4,696	-	-	1,428	6,124
Totals	580,917	116,108	62,573	1,359	182,696	362,736
Guaranteed Sales						
(Exporting Countries)		232,979	88,700	4,089	255,149	580,917
Balance		116,871	26,127	2,730	72,453	218,181

1/ Canadian sales through December 18, 1951.

2/ Sales recorded by International Wheat Council through December 14, 1951.

3/ Quota filled.

4/ Quota temporarily closed.

CANADIAN SITUATION

Legislation Provides for Short-Term Credit to Grain Producers

Bill No. 44, "An Act to provide for Short-Term Credit to Grain Producers in the Prairie Provinces to meet Temporary Financial Difficulties arising from inability to complete Harvesting Operations or to make Delivery of Grain," was given third reading and passed by the House of Commons on December 15. In the course of explaining the measure on the previous day, the Right Hon. C. D. Howe, Minister of Trade and Commerce, made the following comments on the plan's operations:

"...Under the plan which the government is proposing the banks will operate under an arrangement similar to the Farm Improvement Loans Act. That is, they will make loans on their own account to farmers, and the government will stand prepared to meet losses up to 25 per cent of the loans made. This guarantee is larger than under the Farm Improvement Loans Act because the risks are greater, and about the same as under the Veterans Business and Professional Loans Act. The banks will be able to call upon the government to implement its guarantee on October 1, 1952, after there has been an opportunity for deliveries to be made from the 1952 crop as well as the current crop. The loans should, however, be fully repaid out of the proceeds of the 1951 crop.

Since the loans are intended only to provide some cash for a limited period to those farmers who have been unable to deliver any significant volume of grain, it is proposed that the limit shall be \$1,000 to any one farmer. In making individual loans, the banks will take into consideration the quantity of unthreshed or threshed grain which producers will have for delivery when their threshing is completed or when elevator space is available. The banks will also take into consideration deliveries which producers have already made in determining the amount of individual loans. Within the maximum provided, the amount of money which will be loaned in each individual case will be determined by the banks on the basis of their experience and judgment, and of course the banks will bear in mind the considerable guarantee which is being provided by the government of Canada. It is the intent of the plan that these temporary loans will be repaid just as fast as producers can deliver their grain.

May I conclude this explanation by saying that these loans are not in any sense to be regarded as a form of relief. They are interim advances made available at commercial rates of interest to producers who have grain on their farms or who have crops which they have every reason to believe will be harvested in due course...."

Supply Position While farmers' marketings of wheat continue to lag behind those of last year, movement of wheat to forward positions and into export channels is proceeding in greater volume. The last cargo of wheat cleared the lakehead on December 15, the latest closing of the navigation season in several years. Total lake shipments of wheat from Fort William—Fort Arthur during the 1951 navigation season amounted to 201.4 million bushels, the greatest since 1945.

Visible supplies of Canadian wheat on December 13 this year totalled 220.2 million bushels, compared with 216.7 million and 165.9 million on approximately the same date in the preceding two years. The proportion of this year's stocks in forward positions was somewhat higher than a year ago, with less in western interior positions and more in transit and in lake and seaboard positions.

Stocks in country elevators were down from 132.7 million bushels a year ago to 110.0 million this year although there was some increase in stocks in other interior positions. Lakehead stocks, at 17.6 million bushels, were down from 23.5 million a year ago. Stocks on the Pacific Coast, at 8.6 million bushels, were slightly higher than a year ago. Stocks in transit and in store in the Eastern Division and in United States positions were all above the corresponding levels in 1950.

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	461.7
Imports of wheat, August-October	<u>2/</u>	<u>2/</u>
Total estimated supplies	748.8	573.9
Less estimated domestic requirements for crop year	150.0	146.5
Available for export and carryover	598.8	427.4
Deduct:		
Overseas clearances of wheat as grain,		
August 1 to November 30	87.2	53.9
Exports of Canadian wheat to U.S.,		
August 1 to November 30	14.1	4.3
Total exports of wheat	101.4	58.1
Exports of wheat flour in terms of wheat,		
August 1 to November 30	12.8 <u>3/</u>	14.7 <u>3/</u>
Total exports of wheat and wheat flour	114.2	72.8
Balance on December 1 for export and carryover	484.6	354.6

1/ Preliminary.

2/ Less than 50,000 bushels.

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

Exports of wheat as grain and of wheat flour in terms of wheat during November amounted to 39.6 million bushels, the highest since October 1945. Of the 35.5 million bushels exported in the form of wheat during the month, 10.3 million bushels went to the United Kingdom. Total exports of wheat as grain in the first four months of the current crop year amounted to 101.4 million bushels as against 58.1 million for the August—November period of 1950-51. However, exports of wheat flour in terms of wheat, at 12.8 million bushels, were somewhat below the 14.7 million for the comparable period a year ago.

The major markets for Canadian wheat as grain during the four months ending November 30, 1951 were as follows (with exports in million bushels): the United Kingdom, 33.9; the United States, 14.1; Belgium, 8.1; Germany, 5.9; Netherlands, 5.7; and Japan, 4.0. The balance remaining on December 1, 1951 for export and carryover was estimated at 484.6 million bushels as against 354.6 million a year ago.

Farmers' Marketings Deliveries of wheat by Western Canadian farmers up to December 13 of the current crop year totalled 207.0 million bushels as against 222.8 million for the comparable period in 1950-51. Saskatchewan farmers delivered 120.1 million bushels in the period of 1951-52 under review while those in Alberta and Manitoba marketed 57.3 million and 29.5 million, 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
22	752,098	4,567,360	2,705,307	8,024,765	10,841,810
29	675,980	4,545,904	2,946,092	8,167,976	8,453,757
December 6	552,962	5,371,868	4,418,351	10,343,181	7,320,744
13	707,055	5,969,556	3,927,366	10,603,977	6,620,807
Totals	29,521,862	120,143,636	57,349,840	207,015,338	222,807,954

Delivery Quotas Progress continues in the easing of delivery quota restrictions, with only 351 points, or about 17 per cent of the total, still on the initial quota of 6 bushels per seeded acre as at December 18.

**Summary of Elevator Shipping Points in Each Quota Group
for Wheat in Western Canada as at December 18, 1951**

Province	Quota in Bushels Per Seeded Acre						Open	Suspended*	Total
	6	8	10	12	15	20			
Manitoba	-	-	15	21	69	58	-	214	377
Saskatchewan	259	145	316	115	40	2	-	248	1,125
Alberta and British Columbia.	92	22	58	33	16	-	2	371	594
Totals	351	167	389	169	125	60	2	833	2,096

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

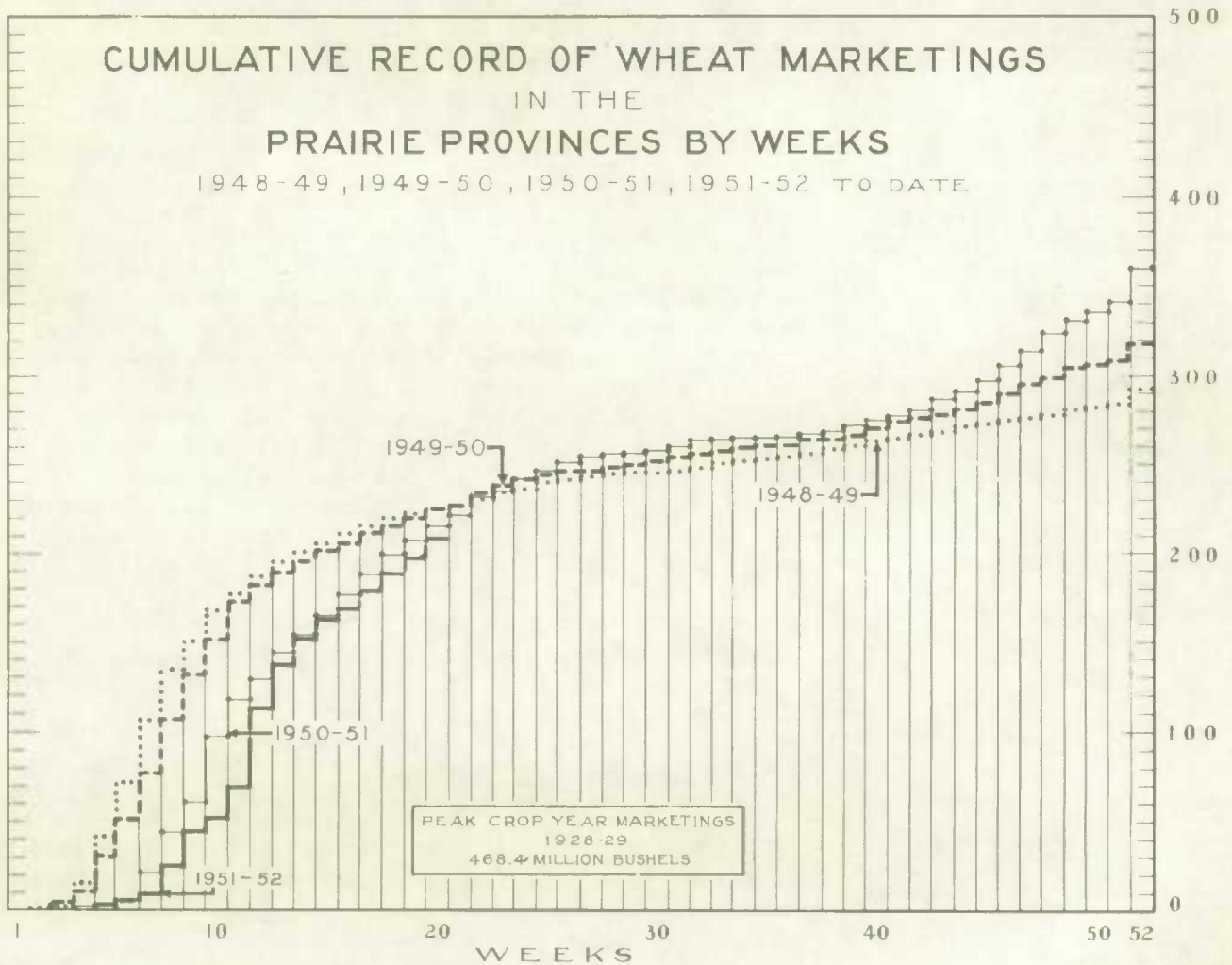
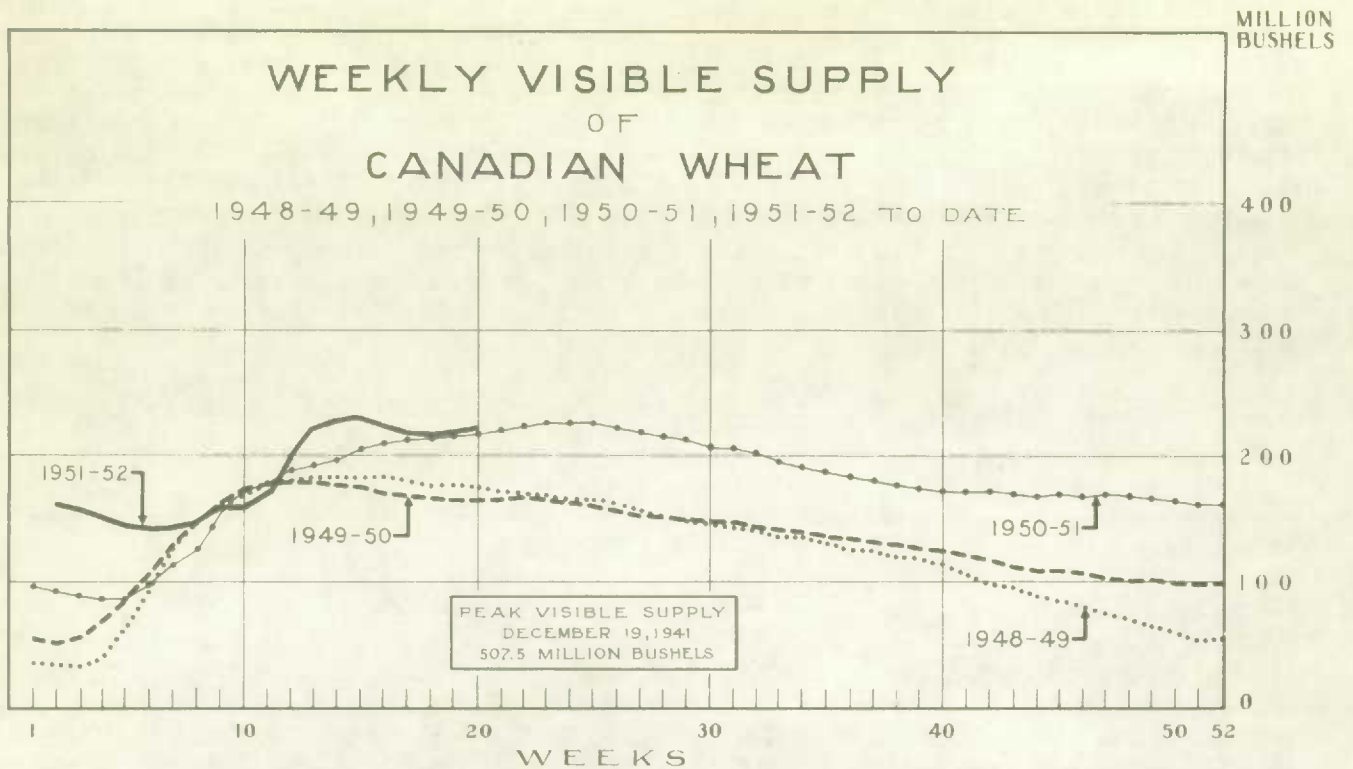
Visible Supply of Canadian Wheat, December 13, 1951 Compared with
Approximately the Same Date, 1950 and 1949

Position	1951	1950	1949
- thousand bushels -			
Country elevators - Manitoba	5,801	11,453	4,254
Saskatchewan	69,783	74,013	35,391
Alberta	34,430	47,239	32,956
Totals	110,014	132,705	72,601
Interior private and mill elevators	5,031	4,292	4,524
Interior terminals	9,839	6,565	96
Vancouver-New Westminster	7,966	7,336	9,497
Prince Rupert	648	-	-
Churchill	1,997	461	126
Fort William-Port Arthur	17,603	23,463	21,499
In transit rail (Western Division)	14,441	7,908	12,732
Bay, Lake and Upper St. Lawrence Ports	23,337	17,301	19,544
Lower St. Lawrence and Maritime Ports	6,649	3,789	11,611
In transit lake	11,718	7,807	-
Storage afloat	-	-	9,815
In transit rail (Eastern Division)	3,580	1,758	2,229
United States ports	6,865	3,114	1,647
In transit U.S.A.	519	199	12
Totals	220,207	216,698	165,932

Grading of Wheat Inspected, August—November, 1951 and 1950

Grade	August—November, 1951		August—November, 1950	
	cars	per cent	cars	per cent
1 Northern	814	0.9	3,627	5.9
2 Northern	6,363	7.2	13,160	21.4
3 Northern	14,900	16.9	8,799	14.3
4 Northern	9,199	10.4	6,546	10.6
5 Wheat	9,840	11.2	7,225	11.7
6 Wheat	8,217	9.3	4,599	7.5
Feed Wheat	1,170	1.3	1,340	2.2
Garnet	354	0.4	689	1.1
Amber Durum	1,825	2.1	2,442	4.0
Alberta Winter .	247	0.3	362	0.6
Toughs 1/	29,470	33.4	9,350	15.2
Damps 1/	4,894	5.6	2,794	4.5
All Others	858	1.0	621	1.0
Totals	88,151	100.0	61,554	100.0

1/ All varieties and grades.



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

Lake Shipments With the sailing of the S.S. Hagarty from the Lakehead on December 15, lake navigation set the latest closing date in recent years. The 1951 navigation season also set a post-war record of 317.3 million bushels, the highest since the 483.7 million shipped in 1945. This year's wheat shipments, at 201.4 million bushels, were practically as large as the entire movement of all grains in 1950 and were almost half as large again as last year's wheat shipments. Shipments of oats, at 58.3 million bushels, were more than double last year's 27.4 million, while barley shipments, at 48.3 million bushels, were well above the 1950 total of 26.8 million. However, shipments of rye and flaxseed, at 7.0 million and 2.2 million bushels, respectively, were somewhat smaller than in 1950.

Lake Shipments of Canadian Grain, Season of Navigation, 1941-1951

Year	Wheat	Oats	Barley	Rye	Flaxseed	Total
- thousand bushels -						
1941	232,974	9,046	11,574	6,092	2,337	262,023
1942	178,511	17,042	10,510	1,029	4,040	211,132
1943	246,159	39,407	44,034	5,439	8,876	343,915
1944	304,249	80,011	56,343	8,156	7,205	455,964
1945	344,406	84,928	45,186	4,828	4,384	483,732
1946	147,431	56,006	30,777	3,771	2,185	240,170
1947	167,334	46,860	29,827	9,909	2,465	256,395
1948	133,422	37,611	33,564	6,809	8,353	219,759
1949	164,195	44,074	35,635	12,583	8,490	264,976
1950 <u>1</u> /	137,048	27,358	26,762	7,219	3,502	201,889
1951 <u>2</u> /	201,424	58,325	48,332	7,014	2,194	317,288

1/ Revised. 2/ Subject to revision.

New Winter Wheat Variety being Tested Genesee is the promising new winter wheat now under test in the province of Ontario according to Farm News issued by the Federal Department of Agriculture, Ottawa. This new wheat variety, named after New York State's Genesee Valley, was developed at the Ithaca Experiment Station, Cornell University, from a selection of crossed hybrids of the Honor, Forward, and Yorkwin varieties. It will be planted in New York State for the production of Registered and Certified seed which will become available to U.S. farmers for the 1953 planting season. Genesee is a beardless, brown-chaffed, yellow-strawed plant that produces a soft white wheat particularly suited for use as a special purpose flour in cakes and pastries.

The Ontario tests—conducted over a period of two years at four different stations—show that Genesee is much more resistant to loose smut than Dawson Golden Chaff, a winter wheat variety grown in Ontario for more than fifty years. In its resistance to loose smut, Genesee compares with "Cornell" 595 which in recent years has become the most popular winter wheat variety in Ontario. Genesee, however, has the advantage over "Cornell" 595 in so far as it outyields the latter by 6-7 per cent and its grain is reported to be more shatter-resistant.

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

Destination	1951	1950	1949
	bu.	bu.	bu.
<u>By Vessel</u>			
Buffalo	14,635,273	7,121,643	6,738,682
Oswego	514,005	-	-
Duluth-Superior	4,264,331	978,121	-
Chicago	1,161,571	269,510	192,766
Detroit	-	287,165	-
Milwaukee	298,326	140,673	-
Erie	93,107	-	-
Totals, Vessel Shipments ...	20,966,613	8,797,112	6,931,448
<u>By Rail</u>			
U.S.A. Seaboard Ports	315,000	54,835	27,190
Other U.S.A. Points	1,834,469	252,264	18,833
Totals, Rail Shipments	2,149,469	307,099	46,023
Grand Totals	23,116,082	9,104,211	6,977,471

Wheat shipments to the United States, either for re-export or retention, continue in relatively heavy volume, with the total from the beginning of the current crop year to December 13 amounting to 23.1 million bushels. Shipments for the comparable periods of 1950 and 1949 were only 9.1 million and 7.0 million bushels, respectively. Of the 21.0 million bushels shipped by vessel during the current crop year, 14.6 million bushels went to Buffalo. The next largest volume of lake shipments, totalling 4.3 million bushels, went to Duluth-Superior, with the remainder going to Chicago, Oswego, Milwaukee and Erie. Rail shipments, at 2.1 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 November 30, 1951	August 1 to November 30, 1950
	- bushels -	
Collingwood	-	2,000
Midland	659,852	756,293
Owen Sound	41,231	244,087
Port McNicoll	507,490	456,601
Goderich	123,745	246,053
Sarnia	-	70,398
Prescott	1,500	-
Totals	1,333,818	1,775,432

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

Month	1951-52	1950-51	1949-50	1948-49
- bushels -				
August	283,914	122,532	158,893	51,283
September	435,068	123,256	131,711	30,017
October	159,667	73,543	122,482	46,274
November	465,193	133,847	92,334	138,600
December		1,517,624	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 November amounted to 465,193 bushels, the highest monthly total since April, 1951. Total rail shipments from Fort William-Port Arthur for the first four months of 1951-52, at 1.3 million bushels, were almost three times the volume shipped during the August-November period last year, and were more than the combined totals for the corresponding periods of the three preceding crop years.

Distribution of this year's November shipments by grade and destination is shown in the table below. With the exception of some 17,800 bushels going to the Maritimes, the November shipments were about equally divided between destinations in Ontario and Quebec.

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

Grade	P.E.I.	N.S.	N.B.	Que.	Ont.	U.S.A.
- bushels -						
1 Northern	-	-	-	-	-	8
5 Wheat	125	-	-	5,334	6,318	-
6 Wheat	-	-	-	43,900	5,666	-
Feed Wheat	-	-	2,667	28,500	9,086	-
Amber Durum	-	-	4,500	60,093	85,887	-
Alberta Winter ...	-	-	-	-	27,849	-
All Others	-	7,594	2,900	78,556	96,210	-
Totals	125	7,594	10,067	216,383	231,016	8

Freight Assistance Shipments Claims filed for payment under the freight assistance plan up to November 30, 1951, represent shipments of 3.2 million bushels of wheat from the Prairie Provinces to Eastern Canada during the first three months of the current crop year. This year's preliminary total, subject to upward revision, is somewhat larger than that filed up to November 30 a year ago, covering the August-October 1950 shipments. Total claims filed for shipments during the first three months of 1950-51 amounted to 3.7 million bushels, with all but one million bushels going 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	3	28	65	57	495	404	168	1,221
September	2	14	52	35	425	450	84	1,063
October	3	8	42	31	429	396	2	911
Totals <u>1/</u>	7	50	159	123	1,350	1,251	254	3,194
Same period 1950-51								
Preliminary <u>2/</u> ...	7	57	155	91	1,360	1,043	318	3,031
Revised <u>1/</u>	13	62	181	111	1,516	1,148	669	3,700

1/ Based on claims filed up to November 30, 1951.

2/ Based on claims filed up to November 30, 1950.

Preliminary data on millfeed shipments from August 1 to October 31, 1951, under the freight assistance plan indicate shipments of 92,894 tons. This year's total, based on claims filed up to November 30, is subject to upward revision with the filing of additional claims. The preliminary total for the comparable period in 1950-51 was 105,011 tons and the revised total 144,048 tons.

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

Province	August 1 to October 31, 1951	August 1 to October 31, 1950	
	Preliminary <u>1/</u>	Preliminary <u>2/</u>	Revised <u>1/</u>
- tons -			
Newfoundland	521	497	977
Prince Edward Island	1,278	2,503	2,817
Nova Scotia	7,440	10,183	13,177
New Brunswick	6,731	6,820	10,086
Quebec	45,111	50,381	67,345
Ontario	26,285	30,090	37,814
British Columbia ...	5,528	4,537	11,832
Totals	92,894	105,011	144,048

1/ Based on claims filed up to November 30, 1951.

2/ Based on claims filed up to November 30, 1950.

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 3/ 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	2,581	21,742	27,182
September	16,726	2,376	2,206	21,308	22,161
October	23,764	3,830	3,893	31,487	24,212
November	29,830	5,687	4,070	39,587	34,671
Totals	87,241	14,133	12,750	114,124	108,226

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, 1950-51 and August, 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, 1951-52

Destination	August	November		August—November	
	Wheat Flour 1/2/ - bushels -	Wheat Flour 2/ - bushels -	Wheat 3/ - bushels -	Wheat Flour 1/2/ - bushels -	Wheat 3/ - bushels -
<u>COMMONWEALTH COUNTRIES</u>					
United Kingdom	157,068	1,755,707	10,335,542	4,308,197	33,883,142
<u>Africa</u>					
Rhodesia	-	-	-	-	3,733
Union of South Africa	-	-	-	-	416,080
<u>British West Africa</u>					
Gambia	-	1,377	-	1,377	-
Gold Coast	9,162	25,538	-	92,718	-
Nigeria	500	14,549	-	36,559	-
Sierra Leone	6,548	6,309	-	20,547	-
<u>Asia</u>					
British Malaya	2,295	-	-	2,295	-
Ceylon	-	-	-	-	-
Hong Kong	113,378	127,904	-	452,975	-
India	90	-	513,420	180	1,505,367
<u>Europe</u>					
Gibraltar	16,942	20,947	-	79,087	-
Malta	-	-	52,367	-	429,435
<u>North America</u>					
Bahamas	30,010	18,792	-	89,167	-
Barbados	46,062	15,345	-	118,008	775
Bermuda	6,039	9,630	-	29,920	-
British Honduras	7,038	3,127	-	19,818	-
Jamaica	284,072	84,627	-	550,044	-
Leeward-Windward Is.	65,768	57,541	-	270,900	-
Trinidad and Tobago	154,282	195,871	-	716,607	-
<u>South America</u>					
British Guiana	112,684	85,122	-	341,883	-
Totals, Commonwealth Countries	1,011,938	2,422,386	10,901,329	7,130,282	36,238,532
<u>FOREIGN COUNTRIES</u>					
<u>Africa</u>					
Azores and Madeira	3,402	-	-	14,368	-
Belgian Congo	27,918	12,451	-	132,669	-
Canary Islands	-	17,757	-	42,971	-
Egypt	-	-	-	-	424,015
French Africa	-	5,076	476,693	5,076	1,489,625
Liberia	860	459	-	4,244	-
Morocco	57,744	82,458	-	235,759	-
Portuguese Africa	6,070	104,724	-	121,063	-
Tripoli	-	-	32,690	-	440,537
<u>Asia</u>					
Arabia	-	-	-	2,578	-
Indonesia	3,442	2,525	-	6,426	-
Iraq	513	-	-	1,026	-
Israel	-	-	346,000	-	646,000
Japan	10,476	27,941	1,914,267	163,310	3,981,354
Philippine Islands	55,625	393,502	-	1,155,137	-
Portuguese Asia	4,590	9,675	-	18,855	-
Siam	7,690	26,959	-	51,912	-
Syria	39,942	262,080	876,297	440,460	1,610,266

Exports of Canadian Wheat and Wheat Flour, 1951-52

Destination	August	November		August—November	
	Wheat Flour 1/2/ - bushels -	Wheat Flour 2/ - bushels -	Wheat 3/	Wheat Flour 1/2/ - bushels -	Wheat 3/
<u>FOREIGN COUNTRIES</u>					
<u>Europe</u>					
Belgium	-	-	2,495,072	-	8,119,184 4/
Denmark	-	-	-	-	537,600
France	-	2,021	347,460	3,627	1,969,931
Germany	-	-	3,992,770	1,836	5,850,995
Greece	112	-	-	224	-
Iceland	-	21,276	-	50,341	-
Ireland	-	-	1,785,984	-	3,927,536
Italy	7,790	2,754	551,600	28,314	2,399,677
Netherlands	-	-	1,053,971	-	5,733,354
Norway	-	-	740,513	-	1,686,242
Portugal,	-	1,985	-	8,631	-
Spain	-	-	-	-	304,500
Sweden	-	-	625,576	-	1,215,709
Switzerland	-	-	1,397,396	-	3,898,145 4/
Yugoslavia	1,377	7,114	668,030	20,884	1,045,530
<u>North America</u>					
Costa Rica	69,566	16,407	12,600	143,996	41,867
Cuba	400,833	202,050	-	861,327	500
Dominican Republic	14,224	15,138	-	54,972	1,400
El Salvador	22,374	19,332	-	90,662	-
French West Indies	207	441	-	1,237	-
Guatemala	29,399	78,637	-	149,572	-
Haiti	56,650	33,786	-	110,627	-
Honduras	-	-	-	-	6,666
Netherlands Antilles	17,487	12,838	-	49,698	-
Nicaragua	11,074	21,717	-	62,401	-
Panama	11,781	19,238	-	74,349	-
St. Pierre-Niquelon	180	112	-	4,433	-
United States					
Flour in terms of wheat ..	148,450	21,987	-	227,169	-
For grinding in bond 5/...	-	-	1,363,340	-	1,987,419
For domestic use 5/.....	-	-	4,323,275	-	12,145,934
Virgin Islands	4,221	1,638	-	6,687	-
<u>South America</u>					
Bolivia	-	-	-	-	292,694
Brazil	-	-	384,533	-	2,944,479
Chile	-	-	1,105,704	-	2,214,504
Colombia	18,612	18,468	94,108	71,617	114,080
Ecuador	25,457	42,525	27,557	117,599	27,557
Peru	-	-	-	-	78,773
Surinam	6,152	8,789	-	31,024	-
Venezuela	505,152	153,297	-	1,052,739	-
Totals,					
Foreign Countries	1,569,370	1,647,157	24,615,436	5,619,820	65,136,073
Grand Totals	2,581,308	4,069,543	35,516,765	12,750,102	101,374,605

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

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

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

4/ For the month of August add to Switzerland and deduct from Belgium 3,674 bushels.

5/ 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			
	Nov. 24	Dec. 1	Dec. 8	Dec. 15
- 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	187/7	187	185/6	184/4
1 Northern	187/7	187	185/6	184/4
2 Northern	185/7	185	183/6	182/4
3 Northern	183/7	183	181/6	180/4
4 Northern	177/7	177	175/6	174/4
5 Wheat	172/7	172/5	171/6	170/4
6 Wheat	161/7	161/5	160/6	159/4
Feed Wheat	155/7	155/5	154/6	153/4
1 C.W. Garnet	185/7	185	183/6	182/4
2 C.W. Garnet	184/7	184	182/6	181/4
3 C.W. Garnet	181/7	181	179/6	178/4
1 Alberta Red Winter	187/7	187	185/6	184/4
2 Alberta Winter	185/7	185	183/6	182/4
3 Alberta Winter	183/7	183	181/6	180/4
1 C.W. Amber Durum	187/7	187	185/6	184/4
2 C.W. Amber Durum	185/7	185	183/6	182/4
3 C.W. Amber Durum	184/7	184	182/6	181/4
 <u>Export - Class II</u>				
1 Hard	243/7	243/5	243/6	244/4
1 Northern	243/7	243/5	243/6	244/4
2 Northern	241/7	241/5	241/6	242/4
3 Northern	239/7	239/5	239/6	240/4
4 Northern	233/7	233/5	233/6	234/4
5 Wheat	178/7	178/5	177/6	176/4
6 Wheat	167/7	167/5	166/6	165/4
Feed Wheat	161/7	161/5	160/6	159/4
1 C.W. Amber Durum	243/7	243/5	243/6	244/6
2 C.W. Amber Durum	241/7	241/5	241/6	242/4
3 C.W. Amber Durum	240/7	240/5	240/6	241/4

1/ Plus 6 cents carrying charge.

CANADIAN FLOUR MILLING SITUATION

Production Wheat flour production reported by Canadian mills for November 1951 amounted to 1.9 million barrels, practically unchanged from the previous month, but below the 2.1 million produced in November 1950. Mills reporting operations during November this year had a rated capacity of 96,999 barrels and, on the basis of a 26-day working period, 77.1 per cent of this capacity was effective. Mill grindings during the month totalled 9.0 million bushels of wheat as against 9.6 million in November last year and 8.8 million in October 1951.

Exports According to preliminary Customs returns, exports of Canadian wheat flour during November 1951 amounted to 904,343 barrels (4.1 million bushels of wheat equivalent). About 43 per cent of the November shipments, amounting to 1.8 million bushels of wheat equivalent, went to the United Kingdom. Other shipments in excess of 150,000 bushels of wheat equivalent went to the Philippine Islands (393,502), Syria (262,080), Cuba (202,050), Trinidad and Tobago (195,871), and Venezuela (153,297).

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
<u>1951-52</u>			
August	7,747,885 ^{2/}	1,699,569 ^{2/}	573,624
September	8,173,807 ^{2/}	1,797,624 ^{2/}	490,316
October	8,832,670 ^{2/}	1,926,302 ^{2/}	865,073
November	8,957,474 ^{2/}	1,944,215 ^{2/}	904,343
Totals	33,711,836 ^{2/}	7,367,710 ^{2/}	2,833,356

^{1/} Based on Customs returns. Exports for the crop years 1945-46 to 1950-51 and August, 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 Relatively minor changes in the statistical position of United States wheat supplies for both 1950-51 and 1951-52 have resulted from the publication of the 1951 annual summary of crop production by the Bureau of Agricultural Economics. The 1950 production of all wheat, based on data from the 1950 Census of Agriculture, is now placed at 1,019.4 million bushels, while the 1951 outturn is estimated at 987.5 million bushels. Total domestic supplies for the current crop year are estimated at 1,383.8 million bushels as against 1,446.2 million for 1950-51. However, imports of wheat for domestic use during the July-November period of 1951-52 amounted to 14.2 million bushels and United States sources estimate that total crop-year imports may reach 40 million bushels. In 1950-51 imports of wheat and dutiable flours in terms of wheat amounted to some 12 million bushels.

United States Wheat Supplies

Item	1951-52 <u>1/</u>	1950-51
	- million bushels -	
Carryover at July 1	396.3	426.8
New crop	987.5 <u>2/</u>	1,019.4 <u>2/</u>
Total estimated domestic supplies	1,383.8 <u>2/</u>	1,446.2 <u>2/</u>
Imports of wheat for domestic use, July—November	14.2	0.6
Total estimated supplies <u>3/</u>	1,398.0	1,446.8
Less estimated domestic requirements for crop year <u>4/</u> ..	730.0 <u>2/</u>	696.3 <u>2/</u>
Available for export and carryover	668.0	750.5
Deduct:		
Exports of wheat as grain, July—November	167.3	75.9
Exports of wheat flour and macaroni in terms of wheat, July—November	16.8	13.7
Total exports of wheat, wheat flour and macaroni .	184.1	89.6
Balance on December 1 for export and carryover	483.9	660.9

1/ Preliminary.

2/ Revised.

3/ Excluding imports for December—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 heavy export movement of United States wheat continued in November, with 34 million bushels shipped either as grain or wheat equivalent. Exports of wheat as grain during the five months ending November 30, 1951, totalled 167.3 million bushels as against 75.9 million for the July—November period of 1950-51. In addition, exports of wheat flour and macaroni in terms of wheat during the first five months of the current crop year amounted to 16.8 million bushels,

bringing total exports of wheat and wheat products to 184.1 million bushels. Comparable figures for the August—November period of 1950-51 were 13.7 million and 89.6 million bushels, respectively. The balance remaining on December 1, 1951, for export and carryover was estimated at 483.9 million bushels as against 660.9 million a year ago.

Acreage and Production
of Winter Wheat

The following account of the acreage seeded to winter wheat in the fall of 1951 and a preliminary forecast of production in 1952 is taken from the special report on winter wheat and rye released by the Crop Reporting Board on December 19.

"Acreage seeded to winter wheat for all purposes in the fall of 1951 is estimated at 56,257,000 acres, nearly one per cent more than the 55,802,000 acres seeded a year earlier. Winter wheat seedings in the fall of 1949 were 52,399,000 acres. Winter wheat production in 1952 is forecast at 918 million bushels. This forecast is based on current seeded acreage estimates and an appraisal of reported crop conditions on December 1, soil moisture supply, and other factors affecting yields. A crop of this size would exceed the 645 million bushel crop produced in 1951 by 42 per cent and the 1950 crop of 741 million bushels by 24 per cent. If realized, this crop would be the third largest of record.

In determining the current forecast of production, normal weather conditions are assumed for the remainder of the crop season. Departures from the normal weather pattern between December 1 and harvest time ordinarily exert considerable influence and, occasionally, materially alter the final outturn of the crop. The extent of change in this crop will be determined by the adaptability and tolerance of the crop to favorable or unfavorable weather patterns which develop between now and harvest time. On December 1, winter wheat condition was reported at 88 per cent of normal, compared with 84 per cent a year earlier and 88 per cent reported on December 1, 1949.

Seeding operations were started later than usual this fall. However, planting conditions and moisture supplies during late fall months permitted seedings virtually up to earlier intentions. In Texas, Oklahoma and adjoining areas of New Mexico and Colorado, the acreage seeded is lower than that seeded a year earlier, since expanded plantings of sorghums or cotton in 1951 restricted the acreage available for seeding to wheat this fall. Likewise, heavy abandonment of wheat experienced in the area the past two years has tended to influence growers to operate on a less extensive scale this season. In Missouri, plantings of wheat were smaller because of inability to condition lands damaged by floods and rains during the past summer. Although top growth of plants is shorter and afforded less pasturage than usual in the Great Plains during the fall months, germination has been adequate for even stands and root systems are firmly established."

Survey of Off-Farm
Commercial Type
Grain Storage

Results of a survey of off-farm commercial type grain storage capacity, released on December 11 by the U.S. Department of Agriculture, show an estimated total capacity of approximately 2,175,942,000 bushels for the entire country. The Department pointed out that the totals by States, and for the entire country, are approximations only.

The survey was begun last May, through Production and Marketing Administration State and county committees, with the cooperation of country and terminal warehouse operators, and the grain trade. The figures include the best information available at the time on storage capacity of country and terminal warehouses. They include both private and public storage, and some flat storage. The capacities are for the storage of wheat, oats, barley, shelled corn, field seeds, dry beans and peas, rice, and other grains. CCC-owned storage structures are not included.

Largest capacities, by States, were reported for Texas (217,481,000 bushels), Kansas (206,948,000 bushels), Illinois (201,365,000 bushels), and Minnesota (191,089,000 bushels).

Flour Production In a report released on December 17 the Bureau of the Census, Department of Commerce, estimated October wheat flour production at 21,055 thousand sacks. Although total production in October was 12 per cent higher than the preceding month, the average production per working day in October was 915 thousand sacks, compared with a daily average of 989 thousand sacks in September, and 852 thousand sacks in October, 1950. Wheat flour mills operated at 82.2 per cent of capacity in October as compared with 88.5 in September.

Wheat flour mills in October ground 49,342 thousand bushels of wheat; offal production was estimated at 456 thousand tons. 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.

1951 Wheat Crop
Estimated at 987
Million Bushels In a report released on December 17, the Crop Reporting Board of the Bureau of Agricultural Economics estimated production of all wheat in 1951 in the United States at 987 million bushels, 6 million less than the preliminary estimate. This year's crop is 3 per cent smaller than the 1950 crop of 1,019 million bushels. A 95 million bushel decline in the winter wheat crop from that of 1950 was partially offset by an increase of 63 million bushels in this year's spring wheat crop. Growth and development of the 1951 winter wheat crop occurred under a wide range of conditions. Abandonment of acreage was unusually heavy in the Southern Plains States due to adverse weather during the winter and early spring months, and more than usual loss from insects and diseases. Likewise, rains and threats of rain plagued normal harvest operations in most of the Plains States from northern Oklahoma to the Canadian border.

The total acreage seeded to wheat in the fall of 1950 and the spring of 1951 was 78,059,000 acres compared with 71,287,000 acres seeded for the 1950 crop. Abandonment or loss of 1951 acreage due to adverse weather conditions, insects, diseases and diversion to uses other than for grain harvest was 21.3 per cent of the planted acres or nearly 17 million acres. In 1950, abandonment and diversion of seeded acreage was 13.6 per cent of the total or approximately 10 million acres. The total acreage of all wheat harvested for grain in 1951 was 61,424,000 acres, only fractionally smaller than the 61,610,000 acres harvested in 1950.

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	
November 23, 1951	250 1/2 - 259		November 23, 1951	246 1/4 - 249 1/4	
24	252 - 254		24	248 7/8 - 251 7/8	
26	255 1/2 - 259 1/4		26	252 3/4 - 255 3/4	
27	255 1/2 - 259 1/4		27	253 1/2 - 256 1/2	
28	254 - 266 1/2		28	255 5/8 - 257 5/8	
29	254 1/2 - 257 1/4		29	253 - 255	
30	243 1/4 - 255 1/2		30	252 - 254	
December 1	253 1/2 - 254 1/4		December 1	252 3/8 - 254 3/8	
3	251 1/4 - 254 3/4		3	251 1/4 - 253 1/4	
4	253 1/4 - 255		4	250 5/8 - 252 5/8	
5	252 1/2 - 255 1/2		5	253 1/2 - 255 1/2	
6	255 1/2 - 256 3/4		6	252 3/4 - 254 3/4	
7	255 1/2 - 257		7	253 5/8 - 255 5/8	
8	256		8	253 7/8 - 255 7/8	
10	256 3/4 - 259 3/4		10	253 - 255	
11	251 7/8 - 253 3/8		11	254 1/4 - 256 1/4	
12	251 3/4 - 260 1/4		12	250 5/8 - 252 5/8	
13	252 3/4 - 253 3/4		13	248 3/4 - 250 3/4	
14	248 3/4 - 261 1/2		14	246 1/2 - 248 1/2	
15	251 3/4 - 252 1/2		15	248 7/8 - 250 7/8	
17	254 - 255 3/4		17	249 1/4 - 251 1/4	
18	252 1/2 - 254		18	248 5/8 - 250 5/8	
19	250 1/4 - 254 1/2		19	247 7/8 - 249 7/8	
20	252 1/4		20	249 1/4 - 251 1/4	
21	252 1/4		21	248 5/8 - 250 5/8	
22	251 1/4		22	248 7/8 - 250 7/8	

Chicago Wheat Futures, High Points of Closing

Date	December	March	May	July	September
	- cents and eighths per bushel -				
November 23, 1951	257/6	260	256/7	246/5	247/3
24	261/4	263	260/1	249/3	250/2
26	263/6	265/2	261/1	250/1	251/4
27	265/2	266/5	262/3	251	251/6
28	267/2	267/3	262/1	251/1	252
29	266/6	266/6	261/2	250	250/6
30	266/4	266/4	261/1	250/5	251/2
December 1	265	265/6	261/1	251/3	252
3	264/4	265/5	260/5	250/5	251/4
4	263/7	265/6	260/7	251/3	252/4
5	265/2	266/4	262/1	252/3	253/1
6	267	267/4	262/6	253/2	253/5
7	268/5	269/1	263/5	253/7	254/1
8	269	269/2	265/3	254/2	254/4
10	268/5	269/1	264/2	254/2	254/5
11	264/6	266/1	261/5	251/2	251/5
12	264/6	266	262	252/1	252/4
13	263/4	264/7	261	251/4	252/2
14	261/2	262/5	258/5	248/7	249/5
15	264/6	265/1	261/1	251/2	252
17	264/1	265/3	261/2	251/4	252
18	261/1	262/3	259/3	250/2	251/2
19	259/6	261/5	258/3	249/2	250/4
20	258	261/2	258/4	249/6	250/6
21		260/6	258	249/1	249/7
22		260/6	258/1	249/2	249/5

ARGENTINE SITUATION

Supply Position Exports of wheat and wheat flour in terms of wheat from the Argentine during the crop year ending November 30, 1951, amounted to 95.2 million bushels, some five million below exports for the previous crop year. The carryover at November 30, 1951 was estimated at 7.6 million bushels, practically unchanged from the comparable figure at the beginning of the crop year.

Argentine Wheat Supplies

Item	1950-51 ^{1/}	1949-50
	- 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	125.3
Available for export and carryover	102.8	107.8
Deduct:		
Exports of wheat as grain, December 1--November 30 .	94.1	100.4
Exports of wheat flour in terms of wheat, December 1--November 30	1.1	0.1
Total exports of wheat and wheat flour	95.2	100.5
Carryover at end of crop year (November 30)	7.6	7.3

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

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 December 14, 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 four weeks the principal agricultural areas in Argentina have received from moderate to heavy rainfall. Some districts in the south-east of the province of Buenos Aires had torrential rains reaching flood proportions and causing extensive damage. Rainfall was general in the provinces of Santa Fe and Córdoba and even in the west of the province of Buenos Aires and the province of La Pampa, which areas have been suffering from drought for the last three years, most districts had rainfall up to 2 inches during the first week of December. However, despite this rain there is no reserve of moisture and owing to high temperatures and strong winds more rain is required or drought conditions will continue.

Pastures throughout the province of Buenos Aires, except in the drought areas in the west, are from good to excellent and have greatly improved in recent weeks in Santa Fé and Córdoba.

The corn belt received good rainfall and the crop, although from four to six weeks late, is making very satisfactory progress. Soil moisture conditions are also very satisfactory for sunflower that has already been planted and also for preparing land for this crop.

1951-52 Wheat Crop The 1951-52 wheat crop is now forecast at not over 3 million tons (110.2 million bushels) as against 5.8 million (213.1 million bushels) last year and the five year average of 5.6 million tons (205.8 million bushels). There are indications that the current crop may be substantially less than 3 million tons (110.2 million bushels) which would leave Argentina with available supplies in 1952 less than her home requirements of 3.2 million tons (117.6 million bushels).

As previously reported, the wheat crop in the important grain belt in the provinces of Córdoba and Santa Fé was virtually lost this year on account of drought as farmers were unable to sow. Similarly, drought conditions reduced sowings in the western zone and sowings along the wheat crescent in the south of the province of Buenos Aires from Bahia Blanca to Necochea were also reduced from 12 per cent to 30 per cent from last year.

Harvesting has commenced in the few districts in the south of Santa Fé and Córdoba where there are limited quantities worth cutting. The harvest has also commenced in the important zone tributary to Bahia Blanca but the yields are only from 2 to 7 bushels per acre. It is a bad sign when the harvest has commenced in the Bahia Blanca zone so early as it indicates a poor crop. In the districts of Dorrego, Tres Arroyos and Necochea, further east on the southern coast of the province, the wheat crop is later and the prospects of yields are somewhat improved. While an exceptional field may yield from 18 to 20 quintals per hectare (from 27 to 30 bushels per acre), the majority of the wheat yields in the southern district are not expected to be over 8 or 9 quintals per hectare (12 or 13 bushels per acre) at best.

Official Measures Taken to Alleviate Supply Position in 1952 The anxiety brought about by the reduced grain crops this season is evidenced by the Argentine Government having announced two important measures:

1. A decree emanating from the Ministry of Economic Affairs on December 12th prohibits the sale and use for feed of 1951-52 crop wheat (grades 1 to 4 inclusive) throughout the Republic. The announcement states that the prospects for the current wheat crop are substantially reduced in volume owing to adverse climatic conditions which necessitates the conservation of wheat. At the same time it was announced that the supply of other grains for forage is virtually assured.

With reference to the Government's purchases of 1951-52 crop wheat, oats, barley and rye, offers must be presented to the branches of the Banco de la Nación, General Market of National Products of Rosario and central offices of I.A.P.I. For wheat and barley the offers must also be sent to the Mercado de Cereales a Término of

Buenos Aires and for oats and rye to the Bolsa de Cereales.

2. On December 12th it was officially announced that I.A.P.I., the State trading agency, would buy 1951-52 crop wheat suitable for emergency seed. They also announced that they would pay the producers a bonus of 4 pesos per quintal (22 cents per bushel) on the basic prices previously established, thus bringing the price to the producer up to 38.00 pesos the quintal (\$2.07 per bushel). In the case of wheat from the provinces of Córdoba and La Pampa and districts of Santa Fé worst stricken by drought where the producers are to receive a bonus of 5 pesos (27 cents per bushel) this brings the price up to 43.00 pesos the quintal (\$2.34 per bushel), and in the provinces of Entre Rios, part of Santa Fé and the northwest of Buenos Aires, where a bonus of 3 pesos (16 cents per bushel) was established, the price will be 41.00 pesos per quintal (\$2.23 per bushel).

It was also announced that I.A.P.I. would sell 1950-51 crop rye to farmers who require it for seed. Applications in each case are to be made to the branch offices of the Banco de la Nación.

It is possible that millers may have to increase their flour extraction by 4 per cent, bringing it to 82 per cent, but no official decision is likely until more definite estimates of production are available.

Loans to Producers in Drought Stricken Areas The Banco de la Nación announced during November that loans of up to 10,000 pesos (\$2,000) would be granted, interest free, to farmers in the area severely affected by drought. A loan will also be granted to farmers who have lost their crop through adverse climatic conditions. No time limit was specified for the duration of the loan. The Bank has also announced that loans carrying an interest rate of 5 per cent per annum for 180 days will be considered to assist producers in the purchase of sunflower seed and in the planting and harvest of same. Similar loans will be granted to producers of chickpeas.

Grain Exports Shipments of grain during November totalled 192,871 tons, still lower than the October figure of 212,222 tons. Thus the cumulative total for the 11 months ended November 30 is 3,229,538 tons as against 4,134,526 tons in 1950. Of exports in November wheat accounted for 81,330 tons, or little over one-third of the monthly average for shipments of this grain in the preceding ten months and the lowest figure since September 1948. Exports of corn at 52,405 show an improvement over the average of 20,332 tons during the ten month period January to October but are 20 per cent less than shipments in October and the cumulative total for this grain during the 11 month period at 255,723 tons is little over one-third of shipments during the same period of 1950. Flax continued to be shipped in very small quantities and the only bright spot in the month's exports of grain is barley at 51,886 tons, nearly 40 per cent of the total shipments of this grain during the ten month period.

The sharp decline in shipments of all grains can best be indicated by the following tables with comparative data:

Argentine Grain Shipments, January—November, 1948—1951

Crop	1951	1950	1949	1948
- thousand bushels -				
Wheat	88,532	95,644	62,691	73,289
Corn	10,067	30,972	38,396	89,313
Flax	6,648	4,287	-	-
Oats	5,402	24,116	10,002	4,972
Rye	6,985	6,782	6,856	5,437
Barley	6,190	4,211	8,630	28,916

Argentine Grain Shipments, November, 1948—1951

Wheat	2,988	5,230	6,044	3,383
Corn	2,063	7	6,757	13,091
Flax	110	1,795	-	-
Oats	289	2,550	198	-
Rye	-	591	260	-
Barley	2,383	602	145	1,549

Argentine Grain Shipments, January—November, 1951, by Months

Month	Wheat	Corn	Flax	Oats	Rye	Barley
- thousand bushels -						
November	2,988	2,063	110	289	-	2,383
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	88,532	10,067	6,648	5,402	6,985	6,190

The following table sets out the shipments of grain from the Argentine during the period January—November, 1951 according to destination:

Argentine Grain Shipments, January—November, 1951

Destination	Wheat	Corn	Flax	Oats	Rye	Barley
- thousand bushels -						
Austria	-	-	-	-	321	303
Belgium	1,733	790	626	313	699	964
Brazil	31,862	-	-	94	-	46
Chile	1,213	-	73	-	-	-
Czechoslovakia	-	-	-	-	390	-
Denmark	-	-	-	-	574	-
Egypt	563	-	-	-	-	-
Finland	-	131	37	-	1,220	-
France	1,505	6,963	2,371	-	-	-
French Africa	3,088	39	-	-	-	-
Germany	4,510	387	196	1,128	1,872	3,775
Holland	1,579	454	985	1,523	1,740	322
India	18,030	-	-	-	-	-
Italy	15,234	-	260	-	-	139
Norway	-	-	411	195	-	-
Paraguay	1,849	-	-	-	-	-
Peru	2,570	-	-	-	-	-
Portugal	-	-	236	-	-	-
Spain	-	-	154	-	-	-
Sweden	1,102	51	118	529	166	-
Switzerland	1,931	1,091	217	868	-	211
United Kingdom	1,764	162	965	529	4	-
Uruguay	-	-	-	223	-	-
Yugoslavia	-	-	-	-	-	429
Totals	88,532	10,067	6,648	5,402	6,985	6,190

AUSTRALIAN SITUATION

Supply Position While data on total exports for the 1950-51 crop year are not currently available, the volume of Australian wheat exported as grain or as flour in terms of wheat up to November 24 amounted to 128.8 million bushels. Exports of wheat as grain during the period amounted to 85.2 million bushels as against 81.9 million for the comparable period of 1949-50, while exports of wheat flour in terms of wheat were up from 35.6 million to 43.6 million bushels. Heavier exports of both wheat and flour during 1950-51, combined with somewhat smaller total supplies than in the preceding crop year, have reduced carryover stocks to less than half the 43.9 million bushels on hand at the beginning of the crop year.

Australian Wheat Supplies

Item	1950-51 <u>1/</u>	1949-50
	- million bushels -	
Carryover at November 30 (including flour as wheat)	43.9 <u>2/</u>	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--November 24	85.2	81.9
Exports of wheat flour in terms of wheat		
December 1--November 24	43.6	35.6
Total exports of wheat and wheat flour	128.8	117.5
Balance on November 25 for export and carryover	19.3	41.5 <u>2/</u>

1/ Preliminary.

2/ Pending receipt of official disposition data, no attempt has been made to reconcile the small discrepancy in carryover figures.

Australian Cable The following cable, dated December 14, 1951, has been received from the Commercial Secretary for Canada (Agricultural) in Melbourne:

"Australian wheat stocks at November 24 totalled 18,991,000 bushels. Wheat exports from December 1, 1950 to November 24 totalled 85,227,000 bushels, with shipments during preceding four weeks mainly to Italy, United Kingdom and New Zealand. Flour exports for the same period were 811,277 long tons, with 16,913 going to Ceylon, 11,499 to Egypt, 9,992 to Malaya, and 9,728 to the United Kingdom. An officer of the Australian Wheat Board estimates this season's harvest will be 165 million bushels, with about 85 million available for export. During the past month there was further sale to India within I.W.A. of about 2,500,000 bushels wheat."

Guaranteed Price for 1951-52 Wheat Crop In a press release dated November 28, 1951, at Canberra the Minister for Commerce and Agriculture, Mr. McEwen, announced that the guaranteed price to growers for wheat from the 1951-52 crop in No. 15 pool would be 10/-d. a bushel, bulk basis, f.o.r. ports. This was an increase of 2/2d. a bushel above the price for 1950-51. (The Australian pound was nominally quoted at 2.264 Canadian dollars as at December 31, 1951.) The following extracts are taken from the release:

"...Mr. McEwen said that the new price was the amount guaranteed to growers by the Commonwealth Government for up to 100 million bushels of wheat exported from No. 15 Pool. Under existing State legislation, the guaranteed price automatically became the price for all wheat used in Australia, either for human consumption or for stock feed.

However, as a result of recent negotiations between the Commonwealth and State Governments on feed wheat policy, it had been agreed that the Wheat Stabilization Acts would be amended to provide for two separate prices for wheat used in Australia. Wheat for human consumption would be sold at the guaranteed price of 10/-d. a bushel, but the price of stock feed wheat for the pig, poultry and dairying industries would be 12/-d. a bushel.

Mr. McEwen said that it should be carried in mind by wheatgrowers that if, as was anticipated, the State legislation governing the price of wheat in Australia was amended to provide for a feed wheat price of 12/-d. a bushel, the Commonwealth Government would make up the difference between 12/-d. and 16/1d. a bushel, which to date has been the ceiling price for wheat marketed under the International Wheat Agreement, in respect of a maximum of 26 million bushels. This Commonwealth subsidy, paid to growers through the Australian Wheat Board, would amount to approximately £5,300,000 in the 1951-52 season.

Mr. McEwen said that the new guaranteed price had been decided upon after a review by the Bureau of Agricultural Economics of movements in the index of wheat production costs. Under the Wheat Stabilization Scheme, the guaranteed price was fixed at 6/3d. a bushel, bulk basis, f.o.r. ports, for the 1947-48 season, following a Commonwealth-wide survey of wheat production costs carried out by a special committee appointed for that purpose. From the information gathered in the Committee's survey, the Bureau of Agricultural Economics compiled an index of the items entering into the costs of growing wheat. Each season the Bureau calculated movements in the items comprising the index, and the findings of the Bureau were thoroughly examined by a representative of the Australian Agricultural Council and a representative of the Australian Wheatgrowers' Federation before the Director of the Bureau recommended to the responsible Minister the adjustments which should be made in the guaranteed price.

Mr. McEwen said that the items in which major increases had taken place over the last year were as follows:

Increase in Net Costs per Bushel in last Twelve Months

	<u>pence</u>
Farmer's labour	6.86
Harvest labour	1.12
Other labour	1.45
Fencing and basic building materials	1.83
Fertilizer	1.31
Cornsacks	1.04
Interest on Grower's equity	2.62
Rail freight and handling charges	5.76

Commenting on the new price Mr. McEwen said: "Even with wheat for human consumption at 10/-d. a bushel and feed wheat for the pig, poultry and dairying industries at 12/-d. a bushel, Australian consumers are receiving wheat at little more than half the price which can be obtained on the free export markets, the aggregate saving being about £30 million in 1951-52. Australian wheatgrowers are still making a very substantial contribution to the internal stability of the country."

"It is hoped that the increased returns to growers which will follow the adjustment of the guaranteed price and the alteration in the feed wheat policy will encourage wheatgrowers to expand production. The decline in wheat acreages which have taken place over recent years is a matter of national concern."

CALENDAR OF WHEAT EVENTS

- December 4 - The Canadian Wheat Board requested that wheat expected to grade dry 1, 2 3 or 4 Northern be shipped to Vancouver from 28 stations in Saskatchewan having a freight differential of 4 cents per hundred pounds in favour of Fort William.
- 13 - Ocean navigation closed at Montreal with the departure for Cuba of the Norwegian freighter hadrian. Preliminary data on shipments indicate that 109 million bushels of grain were shipped from Montreal during the 1951 navigation season, compared with 85 million in 1950.
- 14 - A press release from Buenos Aires reported that the Argentine government has issued an order prohibiting the feeding of wheat to livestock.
- 15 - Lake navigation closed at Fort William—Port Arthur with the departure of the S.S. Hagarty. Grain shipments during the 1951 navigation season totalled 317.3 million bushels, the largest since 1945.
- 19 - Acreage seeded to winter wheat for all purposes in the United States in the fall of 1951 was estimated at 56.3 million acres, compared with 55.8 million seeded a year earlier. On the basis of conditions at December 1, winter wheat production in 1952 was forecast at 918 million bushels.

According to a press report from Buenos Aires, President Peron announced that it is the intention of his government to raise Argentina's wheat production next year to approximately 375 million bushels. Production this year has been estimated at little more than half the 1950 outturn of 213 million bushels.

- 27 - The acreage planted to wheat up to December 1 in France was officially placed at 8,647,000 compared with 8,884,000 on the same date last year and 9,188,000 two years ago.

A larger wheat acreage is reported to have been planted in Spain this year although the extent of the increase has not yet been estimated. Growing conditions are reported as satisfactory.

- 31 - The 1951 wheat crop in France has been estimated at 259.6 million bushels, compared with 282.9 million in 1950 and the 1930-39 average of 295.7 million bushels.

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