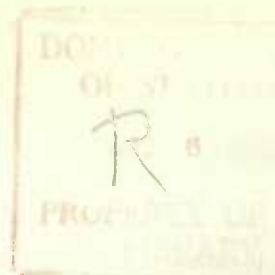


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CANADA

DOMINION BUREAU OF STATISTICS
AGRICULTURE DIVISION



THE WHEAT REVIEW



FEBRUARY, 1952

DOMINION BUREAU OF STATISTICS
Department of Trade and Commerce

THE
WHEAT REVIEW

FEBRUARY, 1952

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Minister of Trade and Commerce

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WORLD WHEAT SITUATION

Current Supplies The latest available estimates indicate that supplies of wheat remaining on or about February 1, 1952 in the four major exporting countries for export and carryover at the end of their respective crop years amounted to 946 million bushels. At the same time in 1951, 1,152 millions were available. Supplies this year (in millions of bushels) were held as follows, last year's figures in brackets: Canada, 444 (323); United States, 408 (612); Australia, 90 (124); and Argentina, 4.5 (93). The current supply level is not only running some 18 per cent below that of a year ago but the distribution and quality of present stocks varies from the usual pattern.

While Canada's 1951 wheat crop was of near-record proportions, some 150 million bushels have had to remain in the fields over winter. Whether all this grain can be recovered will not be known until the completion of spring harvesting operations. Moreover, as a result of unfavourable harvesting weather, an abnormally large volume of western wheat was threshed tough and damp. Of the 250 million bushels delivered by early February some 116 million graded 'tough' or 'damp'. To further complicate the situation, some 54 million bushels of tough and damp oats and barley had been received at country elevators up to the same time.

The handling of a large volume of out-of-condition grain has placed a heavy strain on storage and drying facilities. However, the fullest possible use is being made of available drying equipment; extra equipment has been secured where possible, and buyers both at home and abroad have helped materially to relieve the situation by accepting substantial quantities of tough wheat. Despite the several factors adversely affecting the normal flow of grain to forward positions this season, Canada exported 155 million bushels of wheat and flour equivalent during the first six months of the crop year as against 105 million in the same period of 1950-51.

Available supplies of wheat in the United States are much below the levels existing a year ago. With an extremely active export movement under way, it is apparent that the U.S. carryover at June 30, 1952, the end of their crop year, will be well below the carryover a year earlier. In recognition of this, and of the relatively low level of world exportable supplies, the U.S. Government earlier in the season set a high acreage goal of 77.9 million acres for 1952. If average yields were obtained from an acreage of the magnitude indicated, a wheat crop of nearly 1.2 billion bushels would result.

Trade sources now place the recently harvested Argentine wheat crop at only 84.5 million bushels, considerably below earlier estimates, and the smallest crop in recent years in that country. The Argentine Government has passed emergency measures designed to reduce the domestic use of wheat to the minimum level and, in an attempt to encourage greater plantings for the next harvest, has announced a sharp increase in the basic wheat price to be paid to producers.

The Australian wheat crop also turned out below earlier forecasts, and the Government there is also searching for a means of reversing the downward trend of wheat acreage in that country. Since Argentina will not be a factor in the wheat export trade this season and Australia's supplies are relatively small, considerable pressure may be expected on North American stocks for some months to come.

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

Importing Countries	Guaranteed Quantities	Source				Total Purchases	Remainder
		Canada 1/	Australia 2/	France 2/	U.S.A. 2/		
- thousand bushels -							
Austria	11,023	264	-	73	7,672	8,009	3,014
Belgium	20,209	11,074	-	-	8,734	19,808	401
Bolivia 3/.....	2,756	2,037	-	-	782	2,819	-
Brazil 3/	13,228	2,461	-	-	10,739	13,200	-
Ceylon 2/	6,614	-	5,166	-	1,448	6,614	-
Costa Rica 3/	1,213	777	-	-	430	1,207	-
Cuba	7,422	3,935	-	-	3,463	7,398	24
Denmark 3/	1,617	538	-	-	1,103	1,641	-
Dominican Republic 3/..	876	475	-	-	333	808	-
Ecuador 3/	1,286	470	-	-	831	1,301	-
Egypt	14,697	-	-	-	7,609	7,609	7,088
El Salvador 3/	404	173	-	-	234	407	-
Germany	66,139	4	2,904	1,837	47,224	51,969	14,170
Greece	15,726	30	-	-	10,931	10,961	4,765
Guatemala 3/	3 919	239	-	-	684	923	-
Haiti 3/	1,029	419	-	-	684	1,103	-
Honduras Republic 3/...	367	170	-	-	197	367	-
Iceland	404	82	-	-	151	233	171
India	55,116	14,933	10,014	-	28,436	53,383	1,733
Indonesia 3/	3,674	29	1,946	-	1,826	3,801	-
Ireland	10,104	6,351	1,628	-	1,111	9,090	1,014
Israel	5,879	1,196	-	-	4,356	5,552	327
Italy	40,418	8,981	3,879	-	14,291	27,151	13,267
Japan	18,372	3,429	-	-	13,625	17,054	1,318
Lebanon 3/	2,388	8	-	-	2,457	2,465	-
Liberia 3/	37	25	-	-	11	36	-
Mexico	12,860	-	-	-	12,772	12,772	88
Netherlands 3/	24,802	6,805	2,856	-	15,187	24,848	-
New Zealand	4,593	-	4,545	-	-	4,545	48
Nicaragua 3/.....	331	195	-	-	127	322	-
Norway 3/	7,716	2,987	-	-	4,731	7,718	-
Panama 3/	625	303	-	-	321	624	-
Peru 3/	5,512	3,187	-	-	2,466	5,653	-
Philippines	7,202	4,517	3	-	2,678	7,198	4
Portugal	5,626	301	140	-	4,482	4,923	703
Saudi Arabia	1,837	-	52	-	1,250	1,302	535
Spain	4,373	1,102	-	-	1,102	2,204	2,169
Sweden 3/	2,756	-	1,493	-	1,319	2,812	-
Switzerland	6,430	3,418	-	-	2,107	5,525	905
Union of South Africa .	11,023	5,600	-	-	2,053	7,653	3,370
United Kingdom	177,068	50,780	29,668	-	16,473	96,921	80,147
Venezuela 3/	6,246	4,679	-	-	1,421	6,100	-
Totals	580,917	141,974	64,294	1,910	237,851	446,029	
Guaranteed Quantities (Exporting Countries) .		232,979	88,700	4,089	255,149	580,917	
Balance		91,005	24,406	2,179	17,298	134,888	

1/ Canadian sales through February 21, 1952.

2/ Sales recorded by International Wheat Council through February 15, 1952.

3/ Quota filled.

CANADIAN SITUATION

Handling of Tough and Damp Grain in Western Canada

On February 7 the Right Hon. C. D. Howe, Minister of Trade and Commerce, issued the following statement summarizing developments in connection with the handling of tough and damp grain in Western Canada:

" As a result of unfavourable harvesting weather, an abnormally large volume of western wheat was threshed tough or damp. Of the 250,000,000 bushels delivered 116,000,000 bushels were accepted from producers as tough or damp wheat.

The marketing position of oats and barley is not as favourable as that of wheat, but producers have delivered over one half of expected marketings from the threshed oats and barley crops. Some 54,000,000 bushels of tough and damp oats and barley have been delivered by producers. Total deliveries of tough and damp wheat, oats, and barley now amount to 170,000,000 bushels.

This progress in moving tough and damp grain from farms has been made possible by the co-operation of elevator companies and their agents, the Board of Grain Commissioners for Canada, the Transport Controller, and the railways.

The Canadian Wheat Board has been selling substantial quantities of tough wheat for milling in Canada and for shipment to overseas customers. As soon as the effects of the unfavourable harvest became known, the Board arranged with United Kingdom and European buyers to take substantial quantities of tough wheat. In this way buyers at home and abroad have helped to relieve the situation. Some 30,000,000 bushels of tough wheat have been shipped eastward from the Lakehead to date, and western mills have also taken substantial quantities of tough wheat. Large sales of tough oats and barley have been made by the Board.

Every effort is being made to use the full drying capacity of all terminal elevators, and about 36,000,000 bushels of grain have already been dried.

The Canadian Wheat Board has been negotiating for the use of drying facilities and storage space in the United States. The Canadian Pacific and Canadian National Railways have co-operated in this connection by setting a special freight tariff. It is now expected that substantial quantities of western wheat will be shipped in bond to the United States for drying."

Supply Position During the week ending February 14 cumulative wheat marketings by farmers in Western Canada exceeded those of the corresponding period of 1950-51 for the first time. Relatively heavy marketings of 11.4 million bushels of wheat during the first two weeks of February brought this year's total up to 259.2 million bushels, as against 259.1 million for the same period last year. Visible supplies of Canadian wheat on February 14, 1952 amounted to 220.0 million bushels, compared with 211.6 million and 149.4 million, respectively, on approximately the same date in the preceding two years. Slightly less than half this year's commercial supplies was still in country elevators on February 14, as against 60 per cent a year ago.

Exports of wheat as grain during January 1952 amounted to 16.0 million bushels, compared with 16.8 million in December and 11.8 million in January 1951.

Total exports of wheat as grain for the first half of the current crop year, at 134.2 million bushels, were up sharply from the 80.2 million exported during the August-January period of 1950-51. Exports of wheat flour in terms of wheat, however, are somewhat below those of 1950-51. Preliminary Customs returns indicate that exports of flour in terms of wheat equivalent amounted to 4.0 million bushels in January, while the cumulative total for the August-January period is 20.9 million bushels. Revised figures for the corresponding periods of 1950-51 are 5.7 million and 24.5 million bushels, respectively.

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 1-December 31	<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-January 31	113.7	71.8
Exports of Canadian wheat to U.S.,		
August 1-January 31	20.5	8.4
Total exports of wheat	134.2	80.2
Exports of wheat flour in terms of wheat,		
August 1-January 31	20.9 <u>3/</u>	24.5 <u>3/</u>
Total exports of wheat and wheat flour	155.1	104.7
Balance on February 1 for export and carryover	443.7	322.7

1/ Preliminary.

2/ Less than 50,000 bushels.

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

Some 44.2 million bushels, representing about one-third of this year's August-January exports of wheat as grain, went to the United Kingdom. Other major markets for Canadian wheat during the period, with quantities in millions of bushels, were as follows: the United States, 20.5 (of which 2.9 million were for milling in bond); Belgium, 9.9; Japan, 7.1; the Netherlands, 6.9; Germany, 6.3; and Switzerland 5.1.

The balance remaining on February 1, 1952 for export and carryover was estimated at 443.7 million bushels, compared with 322.7 million a year ago. This year's total, however, includes an estimated 150 million bushels still unharvested

as of December 31. Consequently, the current supply position is subject to adjustment pending the eventual outcome of spring harvesting operations.

Grain Driers in the Prairie Provinces In order to reduce the moisture content of tough and damp grain before delivery to elevators, farmers in the Prairie Provinces are using an increasing number of farm grain driers. To augment the number of driers in operation, arrangements have been made to facilitate the entry into Canada of portable grain driers, complete with crews, from the United States in much the same way as combines enter during the harvesting season. According to a Canadian Press report of February 26, "Fifty-three farm grain driers are reported operating in the three Prairie Provinces, Dr. J. A. Anderson, Chief of the Board of Grain Commissioners' research laboratory, said today.

Samples of dried grain had been received from 31 of the driers and in the majority of cases tests showed that operators were successful in avoiding damage to the grain passing through the driers.

It was estimated there were about 30 additional driers on the Prairies which haven't been spotted yet.

The majority of the farm plants are located in Saskatchewan.

Of the 53 reported so far, only four are the type declared unfit for drying milling wheat.

At the rate of 1,000 bushels a day, 50 driers could handle about 5,000,000 bushels in a 100-day period."

Number of Elevators as at December 1, 1951 A summary of licensed and unlicensed elevators in Canada, compiled by the Board of Grain Commissioners as at December 1, 1951, indicates that all but 149 of the total of 5,569 were public country elevators. Details of storage capacity by province and kind of license appeared on pages 15 and 16 of the January 1952 issue of this publication.

Number of Elevators, Licensed and Unlicensed,
as at December 1, 1951

	Public Country	Private Country	Mill	Private Terminal	Public Terminal	Semi- Public Terminal	Eastern	Total
B.C. ...	15	-	28	-	1	9	-	53
Alta. ..	1,670	4	12	3	3	-	-	1,692
Sask. ..	3,024	2	9	-	2	-	-	3,037
Man. ...	708	4	6	2	-	2	-	722
Ont. ...	3	-	6	2	-	24	18	53
Que. ...	-	-	-	-	-	-	8	8
N.B. ...	-	-	-	-	-	-	3	3
N.S. ...	-	-	-	-	-	-	1	1
Canada .	5,420	10	61	7	6	35	30	5,569

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
20	648,927	4,237,451	2,064,504	6,950,882	8,563,235
27	620,366	4,148,578	1,636,761	6,405,705	6,437,088
January 3	228,260	3,841,896	1,263,521	5,333,677	4,560,268
10	981,598	5,300,345	2,190,317	8,472,260	3,878,629
17	716,958	4,321,164	2,327,375	7,365,497	5,662,980
24	299,222	2,068,288	870,199	3,237,709	3,013,360
31	200,888	1,811,128	983,209	2,995,225	1,363,719
February 7	343,978	3,503,572	2,361,619	6,209,169	1,295,513
14	192,499	3,435,437	1,599,885	5,227,821	1,491,550
Totals	33,754,558	152,811,495	72,647,230	259,213,283	259,074,296

Summary of Elevator Shipping Points in Each Quota Group
for Wheat in Western Canada as at February 16, 1952

Province	Quota in Bushels Per Seeded Acre						Open	Suspended*	Total
	6	8	10	12	15	20			
Manitoba	-	-	1	-	9	22	-	343	375
Saskatchewan	3	7	111	41	11	1	-	934	1,108
Alberta and British Columbia ..	6	3	18	17	4	1	2	539	590
Totals	9	10	130	58	24	24	2	1,816	2,073

*Quotas may be reinstated at any point should deliveries reach sufficient volume to necessitate such action.

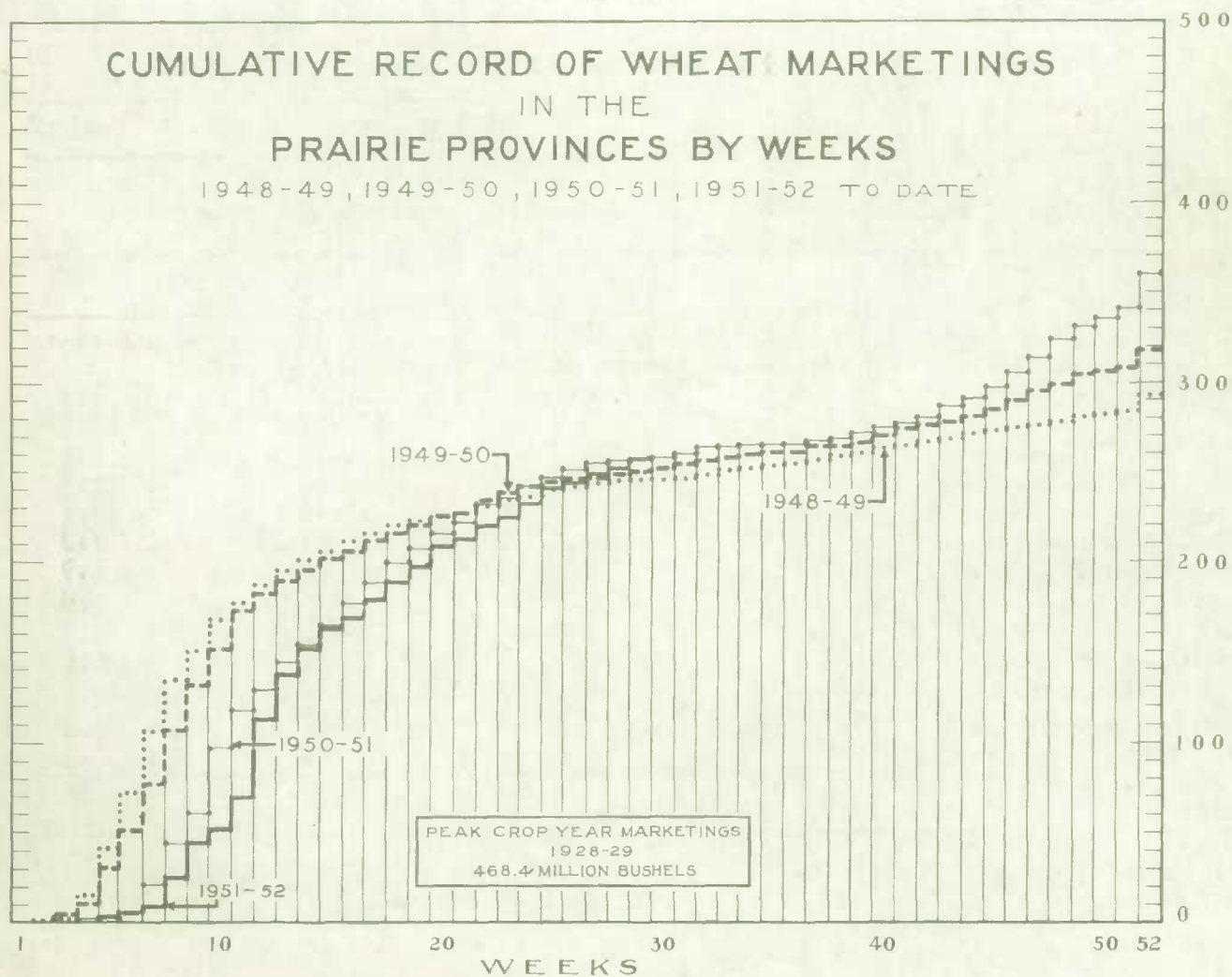
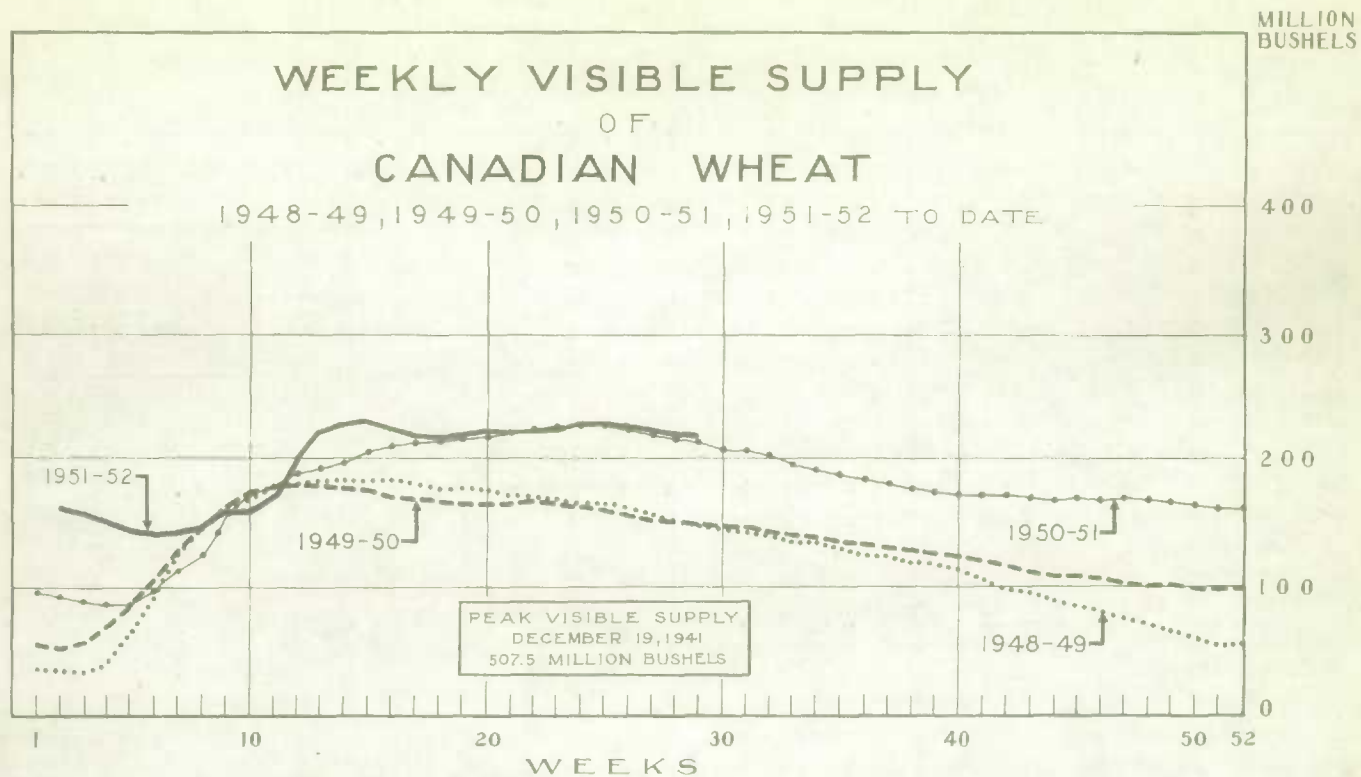
Visible Supply of Canadian Wheat, February 14, 1952 Compared with
Approximately the Same Date, 1951 and 1950

Position	1952	1951	1950
- thousand bushels -			
Country elevators - Manitoba	8,005	11,527	3,730
Saskatchewan	66,692	71,211	30,283
Alberta	32,739	45,210	33,665
Totals	107,436	127,948	67,678
Interior private and mill elevators	5,810	4,668	3,180
Interior terminals	11,068	8,710	87
Vancouver-New Westminster	7,547	6,127	2,507
Prince Rupert	469	-	-
Churchill	1,997	461	126
Fort William-Port Arthur	36,602	36,063	39,462
Storage afloat	-	-	347
In transit rail (Western Division)	9,490	4,509	6,479
Bay, Lake and Upper St. Lawrence Ports	18,539	13,364	12,864
Lower St. Lawrence and Maritime Ports	8,450	4,542	9,966
Storage afloat	4,378	1,677	4,752
In transit rail (Eastern Division)	3,837	2,164	1,171
United States ports	3,623	1,269	778
In transit U.S.A.	757	65	12
Totals	220,003	211,567	149,410

Grading of Wheat Inspected, August—January, 1951-52 and 1950-51

Grade	1951-52		1950-51	
	cars	per cent	cars	per cent
1 Northern	836	0.7	4,389	4.9
2 Northern	7,154	5.7	15,880	17.7
3 Northern	18,883	15.1	13,226	14.7
4 Northern	11,453	9.2	10,181	11.3
5 Wheat	10,409	8.3	9,698	10.8
6 Wheat	8,379	6.7	6,593	7.3
Feed Wheat	1,185	0.9	1,702	1.9
Garnet	448	0.4	907	1.0
Amber Durum	2,214	1.8	2,970	3.3
Alberta Winter	271	0.2	382	0.4
Toughs 1/	45,566	36.4	17,408	19.4
Damps 1/	17,318	13.8	5,689	6.3
All Others	960	0.8	791	0.9
Totals	125,076	100.0	89,816	100.0

1/ All varieties and grades.



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

Wheat Shipments to the United States by Destination
August 1, 1951 to February 14, 1952
Compared with Approximately the Same Period, 1950-51 and 1949-50

Destination	1951-1952	1950-1951	1949-1950
	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	1,903,416	76,835	49,210
Other U.S.A. Points	3,252,604	1,251,934	46,000
Totals, Rail Shipments	5,156,020	1,328,769	95,210
Grand Totals	26,122,633	10,125,881	7,026,658

Rail shipments of wheat to the United States continue in substantial volume, totalling 1.3 million bushels in the four weeks ending February 14, 1952 as against 0.4 million and 34,000 bushels in the comparable four-week periods of the preceding two crop years. Total wheat shipments to the United States, either for re-export or retention for domestic use, from the beginning of the current crop year to February 14, totalled 26.1 million bushels, sharply higher than the 10.1 million and 7.0 million shipped during the corresponding periods of 1950-51 and 1949-50, respectively.

Rail shipments of wheat to Maritime ports from Bay, Lake and Upper St. Lawrence ports, at 6.7 million bushels, are also above last year's level of 5.6 million.

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

Ports	August 1, 1951 to January 31, 1952	August 1, 1950 to January 31, 1951
	- bushels -	
Collingwood	-	550,004
Midland	3,230,821	2,388,738
Owen Sound	1,089,765	384,658
Port McNicoll	2,061,713	1,925,592
Goderich	123,745	246,053
Sarnia	157,750	72,398
Prescott	1,500	-
Totals	6,665,294	5,567,443

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

Month	1951-52	1950-51	1949-50	1948-49
- bushels -				
August	283,914	122,532	158,893	51,283
September	435,068	123,256	131,711	30,017
October	159,667	73,543	122,482	46,274
November	465,193	133,847	92,334	138,600
December	1,387,827	1,517,624	342,946	1,740,405
January	5,839,567	4,394,047	277,502	3,794,391
February		3,303,248	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

In keeping with the usual seasonal pattern, rail shipments of wheat from the Lakehead during January, the first full month following the close of lake navigation, were up sharply over those of preceding months. The January 1952 shipments amounted to 5.8 million bushels, the highest monthly total in recent years. Comparable figures for the same month in the preceding three crop years were 4.4 million, 0.3 million, and 3.8 million bushels, respectively. Total rail shipments of wheat from the Lakehead for the six months ending January 31, 1952 amounted to 8.6 million bushels as against 6.4 million and 1.1 million, respectively, for the first half of the 1950-51 and 1949-50 crop years.

Distribution of the January 1952 shipments by grade and destination is shown in the table below. Some 5.8 million bushels, representing about 84 per cent of the total, went to destinations in the Maritime Provinces.

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

Grade	P.E.I.	N.S.	N.B.	Que.	Ont.	U.S.A.
- bushels -						
2 Northern.....	-	-	4,000	-	-	-
3 Northern	-	-	565,500	-	-	1,514
4 Northern	-	182,000	200,000	6,000	-	-
5 Wheat	125	216,000	-	4,333	4,631	-
6 Wheat	-	311,500	2,000	16,832	-	-
Feed Wheat	-	-	-	5,833	-	8,499
Amber Durum	1,406	313,975	450,437	76,930	150,379	-
Alberta Winter ...	-	-	-	-	1,520	-
Toughs	-	770,500	1,867,000	504,167	114,588	-
All Others	-	-	2,531	19,094	33,773	4,500
Totals	1,531	1,793,975	3,091,468	633,189	304,891	14,513

Freight Assistance Shipments Claims filed for payment under the freight assistance plan up to January 31, 1952 represent shipments of 6.5 million bushels of wheat from the Prairie Provinces to Eastern Canada and British Columbia during the August-December period of the current crop year. This year's preliminary total, subject to upward revision with the filing of additional claims, is greater than both the preliminary and revised totals of 5.4 million and 6.1 million bushels, respectively, for the first five months of 1950-51.

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

Month	Nfld.	P.E.I.	N.S.	N.B.	Que.	Ont.	B.C.	Total
- thousand bushels -								
August, 1951	3	29	66	59	516	408	229	1,310
September	4	17	56	39	463	467	219	1,265
October	7	14	71	54	535	503	163	1,346
November	9	23	80	58	702	650	167	1,689
December	1	16	43	21	395	431	5	913
Totals 1/	24	98	316	231	2,611	2,459	784	6,522
Same period 1950-51								
Preliminary 2/ ...	18	84	274	164	2,382	1,852	644	5,418
Revised 1/	20	88	303	184	2,466	1,949	1,042	6,052

1/ Based on claims filed up to January 31, 1952.

2/ Based on claims filed up to January 31, 1951.

Preliminary data on millfeed shipments from August 1 to December 31 of the current crop year indicate a total of 196,473 tons moving under the freight assistance plan. This year's total, based on claims filed up to January 31, is slightly below the preliminary total for the corresponding period in 1950-51. Revised figures for the August-December period of 1950-51 show a total of 240,431 tons shipped under the plan.

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

Province	August 1 to December 31, 1951		August 1 to December 31, 1950	
	Preliminary 1/		Preliminary 2/	Revised 1/
- tons -				
Newfoundland	1,228		1,369	1,635
Prince Edward Island	2,533		3,641	4,259
Nova Scotia	15,689		18,131	20,326
New Brunswick	13,254		13,518	15,603
Quebec	94,786		107,324	111,699
Ontario	54,333		59,043	67,505
British Columbia	14,650		12,036	19,404
Totals	196,473		215,062	240,431

1/ Based on claims filed up to January 31, 1952.

2/ Based on claims filed up to January 31, 1951.

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	3,151	22,253	22,161
October	23,764	3,830	3,851	31,445	24,212
November	29,830	5,687	4,070	39,586	34,671
December	12,075	4,701	3,249	20,025	37,347
January	14,382	1,620	4,044	20,047	18,523
Totals	113,699	20,455	20,946	155,099	164,096

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

^{2/} Exports for crop years 1949-50, 1950-51 and August to October, 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	October	January		August—January	
	Wheat Flour 1/2/ - bushels -	Wheat Flour 2/ - bushels -	Wheat 3/ - bushels -	Wheat Flour 2/4/ - bushels -	Wheat 3/ - bushels -
<u>COMMONWEALTH COUNTRIES</u>					
United Kingdom	1,761,003	1,451,007	4,990,377	7,424,411	44,185,186
<u>Africa</u>					
Rhodesia	-	-	-	-	3,733
Union of South Africa	-	-	326,667	-	742,747
<u>British West Africa</u>					
Gambia	-	1,606	-	2,983	-
Gold Coast	22,927	963	-	110,097	-
Nigeria	14,670	2,129	-	46,409	-
Sierra Leone	3,672	459	-	24,332	-
<u>Asia</u>					
Aden	-	25,713	-	25,713	-
British Malaya	-	10,332	-	17,221	-
Hong Kong	119,821	58,802	-	578,480	-
India	-	-	1,742,602	90	3,655,120
<u>Europe</u>					
Gibraltar	21,861	18,590	-	128,281	-
Malta	-	-	365,866	-	795,301
<u>North America</u>					
Bahamas	27,158	21,082	-	128,084	-
Barbados	24,116	39,384	-	196,151	775
Bermuda	10,188	9,941	-	55,229	-
British Honduras	4,995	8,181	-	27,621	-
Jamaica	113,877	163,089	-	755,177	-
Leeward-Windward Is.	71,572	58,144	-	406,007	-
Trinidad and Tobago	230,891	265,914	-	1,305,539	-
<u>South America</u>					
British Guiana	98,676	67,000	-	486,256	-
Totals					
Commonwealth Countries ..	2,525,427	2,202,336	7,425,512	11,718,081	49,382,862
<u>FOREIGN COUNTRIES</u>					
<u>Africa</u>					
Azores and Madeira	7,564	-	-	13,414	-
Belgian Congo	54,963	41,441	-	196,033	-
Canary Islands	19,269	-	-	63,752	-
Egypt	-	-	-	-	424,015
French Africa	-	-	723,347	11,876	2,219,440
Liberia	459	563	-	3,947	-
Morocco	111,789	4,837	-	361,242	-
Portuguese Africa	5,153	6,462	-	128,830	-
Tripoli	-	-	-	-	445,180
<u>Asia</u>					
Arabia	2,578	17,739	-	23,368	-
Indonesia	-	17,582	-	24,008	-
Iraq	-	-	-	513	-
Israel	-	-	-	-	965,200
Japan	63,346	-	1,688,400	172,674	7,144,645
Philippine Islands	308,457	680,166	-	2,449,809	-
Portuguese Asia	-	6,314	-	28,544	-
Siam	21,834	10,701	-	93,744	-
Syria	161,725	395,059	1,866	1,051,105	2,286,132 6/

Exports of Canadian Wheat and Wheat Flour, 1951-52

Destination	October	January		August—January	
	Wheat Flour 1/2/ - bushels -	Wheat Flour 2/ - bushels -	Wheat 3/ - bushels -	Wheat Flour 2/4/ - bushels -	Wheat 3/ - bushels -
<u>FOREIGN COUNTRIES</u>					
<u>Europe</u>					
Belgium	-	-	1,205,517	-	9,902,740
Denmark	-	-	-	459	537,600
France	1,422	1,422	352,800	6,472	2,322,731
Germany	-	-	-	5,269	6,280,666
Greece	-	11,475	-	19,161	-
Iceland	39,231	18,185	-	99,023	-
Ireland	-	-	212,333	-	4,514,135
Italy	10,903	6,885	655,200	44,356	3,390,877
Netherlands	-	-	396,435	-	6,947,588
Norway	-	-	484,400	-	2,170,642
Portugal	5,040	-	-	15,057	-
Spain	-	-	-	-	304,500
Sweden	-	-	58,539	-	1,313,418
Switzerland	-	-	407,867	-	5,148,723
Yugoslavia	8,033	2,066	-	25,475	1,092,277
<u>North America</u>					
Costa Rica	17,829	18,706	-	175,225	41,867
Cuba	112,257	119,686	-	1,290,848	500
Dominican Republic	13,558	36,369	-	113,696	1,400
El Salvador	9,846	41,243	-	150,385	-
French West Indies	572	828	-	2,782	-
Guatemala	43,501	26,987	-	229,868	-
Haiti	6,404	92,727	-	259,511	-
Honduras	-	2,065	3,334	2,524	10,000
Netherlands Antilles	16,934	18,310	-	96,741	-
Nicaragua	26,564	17,766	-	94,536	-
Panama	26,573	32,409	-	125,803	-
St. Pierre-Miquelon	1,768	-	-	8,360	-
United States					
Flour in terms of wheat ...	19,922	7,717	-	241,780	-
For grinding in bond 5/ ...	-	-	22,000	-	2,929,527
For domestic use 5/	-	-	1,598,437	-	17,525,170
Virgin Islands	391	202	-	6,889	-
<u>Oceania</u>					
French Oceania	-	19,845	-	19,845	-
Guam	45	-	-	45	-
<u>South America</u>					
Bolivia	-	2,295	-	2,295	292,694
Brazil	-	-	149,333	-	3,093,812
Chile	-	-	-	-	2,214,504
Colombia	9,149	32,089	46,725	111,915	227,937
Ecuador	13,959	45,144	-	192,573	55,115
Peru	-	-	570,635	-	967,403
Surinam	8,973	9,302	-	46,891	-
Venezuela	175,306	97,277	-	1,217,241	-
Totals,					
Foreign Countries	1,325,317	1,841,864	8,577,168	9,227,884	84,770,438
Grand Totals	3,850,744	4,044,200	16,002,680	20,945,965	134,153,300

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

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

6/ For the month of December add to Syria 289,333 bushels, previously reported as "Unknown".

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

Class and Grade	Week ending				
	Jan. 26	Feb. 2	Feb. 9	Feb. 16	Feb. 23
- cents and eighths per bushel -					
<u>Initial Payment to Producers 1951-52 Pool</u>					
1 Hard	140	<u>1</u> / ₈	160	160	160
1 Northern	140	<u>1</u> / ₈	160	160	160
2 Northern	137	<u>1</u> / ₈	157	157	157
3 Northern	134	<u>1</u> / ₈	154	154	154
4 Northern	126	<u>1</u> / ₈	146	146	146
5 Wheat	116	<u>1</u> / ₈	136	136	136
6 Wheat	106	<u>1</u> / ₈	126	126	126
Feed Wheat	100	<u>1</u> / ₈	120	120	120
<u>Domestic and Export 2/</u> <u>(International Wheat Agreement)</u>					
1 Hard	180/1	180/3	180/2	180/2	180/1
1 Northern	180/1	180/3	180/2	180/2	180/1
2 Northern	178/1	178/3	178/2	178/2	178/1
3 Northern	176/1	176/3	176/2	176/2	176/1
4 Northern	170/1	170/3	170/2	170/2	170/1
5 Wheat	167/1	167/3	167/2	167/2	167/1
6 Wheat	156/1	157/3	157/2	157/2	157/1
Feed Wheat	150/1	151/3	151/2	151/2	151/1
1 C.W. Garnet	178/1	178/3	178/2	178/2	178/1
2 C.W. Garnet	177/1	177/3	177/2	177/2	177/1
3 C.W. Garnet	174/1	174/3	174/2	174/2	174/1
1 Alberta Red Winter	180/1	180/3	180/2	180/2	180/1
2 Alberta Winter	178/1	178/3	178/2	178/2	178/1
3 Alberta Winter	176/1	176/3	176/2	176/2	176/1
1 C.W. Amber Durum	180/1	180/3	180/2	180/2	180/1
2 C.W. Amber Durum	178/1	178/3	178/2	178/2	178/1
3 C.W. Amber Durum	177/1	177/3	177/2	177/2	177/1
<u>Export - Class II</u>					
1 Hard	241/1	241/3	241/2	240/7	239/1
1 Northern	241/1	241/3	241/2	240/7	239/1
2 Northern	239/1	239/3	239/2	238/7	237/1
3 Northern	237/1	237/3	237/2	236/7	235/1
4 Northern	231/1	231/3	231/2	230/7	229/1
5 Wheat	173/1	173/3	173/2	173/2	173/1
6 Wheat	162/1	163/3	163/2	163/2	163/1
Feed Wheat	156/1	157/3	157/2	157/2	157/1
1 C.W. Amber Durum	241/1	241/3	241/2	241/2	241/1
2 C.W. Amber Durum	239/1	239/3	239/2	239/2	239/1
3 C.W. Amber Durum	238/1	238/3	238/2	238/2	238/1

1/ Initial payment schedule advanced 20 cents per bushel effective February 1, 1952.

2/ Plus 6 cents carrying charge.

CANADIAN FLOUR MILLING SITUATION

Production Wheat flour production reported by Canadian mills for January 1952 amounted to 1.8 million barrels, representing an increase of about 5 per cent over the previous month, but down about 8 per cent from the January 1951 output. Mills reporting operations during January 1952 had a rated daily capacity of 96,464 barrels and, on the basis of a 26-day working period, 73.5 per cent of this capacity was effective. Mill grindings during the month totalled 8.5 million bushels of wheat, compared with 8.1 million in December and 9.1 million in January 1951.

Exports According to preliminary Customs returns, exports of Canadian wheat flour during January 1952 amounted to 898,711 barrels (4.0 million bushels of wheat equivalent). About 36 per cent of the January shipments, some 1.5 million bushels of wheat equivalent, went to the United Kingdom. The remainder went to more than 50 countries and colonies, with the Philippine Islands, Syria, Trinidad and Tobago, Jamaica, and Cuba each taking shipments in excess of 100,000 bushels of wheat equivalent.

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	106,748,343	23,630,180	12,426,996
1951-52			
August	7,747,885 ^{2/}	1,699,569 ^{2/}	573,624
September	8,173,807 ^{2/}	1,797,624 ^{2/}	700,228
October	8,832,670 ^{2/}	1,926,302 ^{2/}	855,721
November	8,957,474 ^{2/}	1,944,215 ^{2/}	904,343
December	8,064,982 ^{2/}	1,755,062 ^{2/}	722,032
January	8,505,951 ^{2/}	1,844,408 ^{2/}	898,711
Totals	50,282,769	10,967,180	4,654,659

^{1/} Based on Customs returns. Exports for the crop years 1945-46 to 1950-51 and August to October, 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 heavy exports of both wheat and wheat products continue as the United States enters the second half of the current crop year. In the seven months ending January 31, 1952, exports of wheat as grain amounted to 238.4 million bushels, almost double the 120.0 million exported during the July-January period of the preceding crop year. Exports of wheat flour and macaroni in terms of wheat, at 26.8 million bushels, were also up from the 21.0 million exported during the first seven months of 1950-51. Total exports of wheat, wheat flour and macaroni for the July-January period of the current crop year amounted to 265.2 million bushels. This represents an average monthly export movement of almost 38 million bushels, up sharply from the average of just over 20 million bushels for the comparable period last year. The balance remaining on February 1, 1952 for export and carryover was estimated at 408.2 million bushels, a decrease of 204.0 million from a year ago.

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	1,019.4
Total estimated domestic supplies	1,383.8	1,446.2
Imports of wheat for domestic use, July 1--January 31	19.6	3.3
Total estimated supplies <u>2/</u>	1,403.4	1,449.5
Less estimated domestic requirements for crop year <u>3/</u> ...	730.0	696.3
Available for export and carryover	673.4	753.2
Deduct:		
Exports of wheat as grain, July 1--January 31	238.4	120.0
Exports of wheat flour and macaroni in terms of wheat, July 1--January 31	26.8	21.0
Total exports of wheat, wheat flour and macaroni ...	265.2	141.0
Balance on February 1 for export and carryover	408.2	612.2

1/ Preliminary.

2/ Excluding imports for February--June period.

3/ 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.

Condition of Winter Wheat According to the February 11 crop report of the United States Department of Agriculture " Fall-sown wheat has wintered satisfactorily thus far, with growth as far north as Kansas and only limited damage from soil blowing. Lack of topsoil moisture continues in parts of the Great Plains, but most other areas have adequate to ample supplies.

Snow packs in the western mountains give promise of better than average irrigation water supplies over virtually the entire area. ...

Winter wheat still faces a hazardous period, but appears to have wintered in satisfactory condition thus far. Dry topsoils in the central and southern Great Plains and the short top growth of wheat plants have made fields vulnerable to soil blowing. Some erosion is reported in local areas. Little insect infestation has been noted, except cutworms in Texas. Lack of snowcover in central portions of the Plains wheat area has given rise to concern lest future cold waves, following some "greening up" in the previous warm weather, result in freeze damage. In Oklahoma and Texas, small grains made fair growth in most sections and provided some grazing. Soil moisture is temporarily adequate, but rains are now needed to replenish subsoil moisture in virtually all the wheat areas of those States and southwestern Kansas. In the West, most wheat fields have protective snowcover where needed. East of the mountains, however, fields are mostly bare of snow at this date and susceptible to heaving. In the eastern half of the country, soil moisture is ample and small grains are in good condition, with growth reported in the South."

A later report, the Weekly Weather and Crop Bulletin for the week ending February 19, issued by the U.S. Department of Commerce, states that:

" Droughty conditions over the western two-thirds of Texas were only temporarily relieved by light rain, snow and drizzle, as cool, dry, blustery winds immediately took away much of this urgently needed moisture. Texas also reports that wheat in the northwestern part of the State is about holding its own, but the frequency and severity of dust storms are increasing. In Oklahoma wheat showed some improvement, although it needs additional moisture badly in the Panhandle and other western sections. Oat planting made good progress in this State. In Kansas small grains made slight growth, and seeding oats and barley were active. The rain and snow were very beneficial in Nebraska, except too light in the dry south-central and southwestern portions; however, wheat is reported as excellent in most of this State."

Flour Production In a report released on February 12, the Bureau of the Census, Department of Commerce, estimated December wheat flour production at 18,386 thousand sacks, about 7 per cent lower than production in November. The average production per working day in December was 919 thousand sacks, compared with a daily average of 946 thousand sacks in November, and 979 thousand sacks in December 1950. Wheat flour mills in December operated at 82.0 per cent of capacity compared with 84.4 per cent the previous month.

Wheat grindings in December amounted to 43,333 thousand bushels, compared with 46,584 thousand in November. Offal production was estimated at 376 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 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
January 24, 1952	251 1/2 - 254	January 24, 1952	247 1/4 - 248 1/4
25	252 1/4 - 252 1/2	25	246 1/2 - 247 1/2
26	252 3/4 - 255 1/4	26	248
28	251 1/4 - 254 1/4	28	247 1/4
29	250 1/2 - 257	29	248 3/4
30	252 - 253 1/2	30	248 1/8
31	250 - 251	31	245 1/4
February 1	249 3/4	February 1	245 3/8
2	249 1/2 - 250 1/2	2	245 1/2
4	247 - 248 3/4	4	243 1/4
5	246 1/2 - 249 3/4	5	244 3/8
6	249 7/8 - 251 3/8	6	245 3/4
7	250 - 250 3/4	7	245 7/8
8	250 3/4 - 251	8	245 5/8
9	251	9	244 3/4
11	249 - 250 1/2	11	244 1/4
12	Lincoln's Birthday	12	Lincoln's Birthday
13	249 - 251	13	242 5/8
14	247 1/2 - 249 1/2	14	241 1/2
15	249 - 249 1/2	15	241 3/4
16	249 1/2	16	244
18	248 1/4 - 250	18	244 1/4
19	248 1/2 - 250 1/4	19	245 3/4
20	250 - 251 3/4	20	246
21	250 - 250 1/2	21	245 5/8
22	Washington's Birthday	22	Washington's Birthday
23	249 - 250 1/2	23	251 3/8 - 253 3/8

Chicago Wheat Futures, High Points of Closing					
Date	March	May	July	September	December
- cents and eighths per bushel -					
January 24, 1952	258/4	255/2	248/3	249/5	251/6
25	258	254/4	247/5	248/6	251
26	258/4	255/2	248/5	250	252/3
28	258/2	254/4	248/2	249/6	252/4
29	259/2	256	249/4	251/1	254
30	258/7	255/4	249/3	251/1	254/2
31	256/3	252/3	246	247/6	250/7
February 1	256/3	252/5	246/3	248	251
2	256	252/4	246/3	248/4	251/4
4	254/2	250/6	244/6	246/7	250
5	255/4	251/6	245/6	247/4	250/7
6	256/5	252/5	246/3	248	251
7	257/3	252/7	246/5	248/4	251/2
8	257/2	252/7	246/4	248/3	251
9	256/2	252	245/4	246/6	249/6
11	254/7	251	244/4	246/4	249/4
12	Lincoln's Birthday
13	254/3	251	245/1	246/6	249/5
14	252/4	249/7	244/2	245/6	248/6
15	252/4	249/4	244/1	245/6	248/7
16	253/5	251/4	245/7	247/4	250/5
18	253/4	251/4	245/7	247/2	250
19	255/7	253/5	247	248	251/1
20	255/6	253	246/5	247/6	251
21	255/1	252/6	247	248/1	251/1
22	Washington's Birthday
23	255/6	253/5	247/5	248/6	251/6

ARGENTINE SITUATION

Supply Position There have been no official estimates of the current Argentine wheat crop, now practically harvested, but trade sources continue to emphasize the unusually small production. Latest estimates place the 1951-52 crop at only 84.5 million bushels (2.3 million metric tons), barely 40 per cent of the previous year's outturn of 213.1 million bushels. As a result of this year's sharply reduced supplies, the Argentine Government has taken various measures to curtail home consumption during the current crop year and to attempt to increase the acreage seeded to wheat in the coming season. Chief among the measures taken to conserve this year's wheat supplies have been the ban on the use of wheat for live-stock feed, and the increase in the extraction rate for flour to about 82 per cent, on the basis of uncleaned wheat. Guaranteed prices to producers have been raised from 34 to 50 pesos per quintal (\$1.85 to \$2.72 per bushel) as an inducement to increase wheat acreage for the next crop.

Argentine Wheat Supplies

Item	1951-52 <u>1/</u>	1950-51 <u>2/</u>
	- million bushels -	
Carryover at beginning of crop year (December 1)	11.0	7.3
New crop	84.5	213.1
Total estimated supplies	95.5	220.4
Less estimated domestic requirements for crop year ...	88.2	114.2
Available for export and carryover	7.3	106.2
Deduct:		
Exports of wheat as grain, December 1—January 31 ...	2.8	13.5
Exports of wheat flour in terms of wheat, December 1—January 31	<u>3/</u>	<u>3/</u>
Total exports of wheat and wheat flour	2.8	13.5
Balance on February 1 for export and carryover	4.5	92.7

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

2/ Subject to revision.

3/ Less than 50,000 bushels.

The reduction of total supplies to a level below that of usual domestic requirements will virtually eliminate Argentina as a wheat exporter during the present crop year. The relatively small amounts of wheat exported during the first two months of 1951-52 have apparently gone to fulfil earlier export commitments. On the basis of current estimates, subject to revision with the issuance of official statistics, only 4.5 million bushels of wheat remained on February 1 for export and carryover at the end of the crop year, in sharp contrast to a year ago when the figure stood at 92.7 million bushels.

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 February 8, 1952, 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 During January, in which month rainfall is normally lower than in others and accompanied by high temperatures, precipitation was scattered and varied. There have been frequent showers throughout the province of Buenos Aires but only some districts have received copious rain. The heaviest rainfall was in the west of the province of Córdoba and northern Santa Fé which area suffered from severe drought some months ago. In the immediate vicinity of Buenos Aires the weather for the most part has been hot and dry. In general weather conditions have been unfavourable for the corn crop.

Pastures are generally good but in some districts ranchers have been forced to lighten as feed became short.

1951-52 Wheat Crop Argentina's meagre wheat crop is practically all harvested except in some late districts in the south of the province of Buenos Aires. Throughout all zones the yields were disappointingly low and the trade continue to scale down their estimates of current production and now place the total crop at about 2.3 million tons (84.5 million bushels).

Government Investigations with View to Curtailing Wheat Consumption The Ministry of Industry and Commerce has required all manufacturers of alimentary pastes to declare the actual amount of wheat flour used during 1951. The declaration must also include the consumption of wheat flour in manufacturing plants according to location throughout the country as well as the quantities and types of pastes manufactured and sales effected by different plants. In addition the Ministry has notified all bakers in the Federal Capital and Greater Buenos Aires that they must submit a sworn declaration of the average quantities of different types of bread sold daily together with the respective prices to the consumer.

Subsidy on Registered Seed Grain for 1952-53 Crop The Government has announced the prices at which the Ministry of Agriculture is authorized to buy and sell registered seed grain for the 1952-53 crop. The Ministry will purchase "Original" seed wheat at 42.00 pesos per sack of 60 kilos (\$3.31 per bushel) which will be made available to producers for sowing at 36.00 pesos the sack (\$3.27 per bushel). This compares to the purchase price of 34.00 pesos (\$3.08) last year which was sold at 31.00 pesos (\$2.81). Flax seed will be purchased at 50.00 pesos per sack (\$4.24 per bushel) and sold at 44.00 pesos (\$3.73) compared to 40.60 pesos (\$3.44) and 38.00 pesos per sack (\$3.22 per bushel) in 1951. The following table sets out the corresponding prices for the purchase and sale of "Original", 1st, 2nd and 3rd multiplication seed wheat, flax, oats, barley and rye basis in sacks on rail at point of origin and distribution respectively. In respect of seed corn, sunflower, rice, alfalfa and other forages, the Ministry of Agriculture is authorized to establish the prices.

Prices Established for Registered Seed for 1952-53 Crop
- dollars per bushel -

Grain	Buying				Selling			
	Original	Multiplication			Original	Multiplication		
		1st	2nd	3rd		1st	2nd	3rd
Wheat	3.81	3.40	3.31	3.22	3.27	2.86	2.77	2.68
Flax	4.24	3.98	3.90	3.81	3.73	3.47	3.39	3.30
Oats	1.59	1.49	1.39	1.34	1.28	1.18	1.08	1.03
Barley ...	2.40	2.25	2.18	2.11	1.96	1.82	1.74	1.67
Rye	2.80	2.63	2.54	2.46	2.29	2.12	2.03	1.95

Authorization is given to the Ministry to procure up to one million sacks of registered seed from the 1950-51 and 1951-52 crops and for this purpose an appropriation of 45 million pesos (\$9 million) has been sanctioned. This compares with an appropriation of 42 million pesos (\$8.4 million) last year.

The Ministry of Agriculture will also buy high quality seed grain of the 1951-52 crop for multiplication, paying the current official or market price as the case may be, plus the following bonus per 100 kilos: wheat 13.00 pesos (\$0.71 per bushel), corn 15.00 pesos (\$0.76 per bushel), flax 16.00 (\$0.81 per bushel), sunflower 13.00 pesos, and rice 25.00 pesos.

Seed Wheat The Ministry of Economic Affairs announce that I.A.P.I. is prepared to sell seed wheat from the 1951-52 crop at 25.00 pesos per sack of 60 kilos (\$2.27 per bushel) delivered on rail or truck at destination. Early in December this organization announced that they would pay a bonus of 4.00 pesos per 100 kilos (\$0.22 per bushel) for the current crop wheat that is suitable for seed, bringing the official purchase price to 38.00 pesos per 100 kilos (\$2.07 per bushel); this bonus for seed also applies in the drought-stricken areas where additional bonuses of 3.00 and 5.00 pesos (\$0.16 and \$0.27 per bushel) according to zone had been established for wheat. On the open market prices for good quality seed wheat are currently quoted from 41.00 pesos to 43.00 pesos per 100 kilos (\$2.23 to \$2.34 per bushel).

Grain Shipments Argentina continued to export small parcels of grain during January and shipments totalled 233,808 metric tons of which corn accounted for 106,591 tons (4,196,000 bushels) and wheat only 34,622 tons (1,272,000 bushels). This compares to 267,199 tons of grain exported in January last year, of which 231,340 tons (8,500,000 bushels) was wheat.

The weekly report of Messrs. J. E. Turner & Co., local ship agents, carried an interesting item which indicates the shortage of wheat in the northern grain zone. Wheat loaded earlier in the month at Necochea was being discharged at the port of Santa Fé. Necochea is situated in the south of the province of Buenos Aires and is a shipping port for the southern grain belt, while Santa Fé is one of the principal outlets for grain from the northern belt. Many of the flour mills are located in the Rosario-Santa Fé districts and as the wheat crop was virtually lost in that area this season it presents an additional problem of transportation of wheat from the southern zone for milling in the north.

Argentine Grain Shipments, January, 1952

Destination	Wheat	Corn	Flax	Oats	Rye	Barley
- thousand bushels -						
Belgium	-	1,372	71	-	146	-
Brazil	1,049	-	-	6	-	-
France	-	539	560	-	-	-
Germany	-	66	25	-	346	1,317
Holland	-	193	-	365	245	191
Norway	-	79	-	-	-	-
Paraguay	223	-	-	-	-	-
Sweden	-	1,948	81	-	159	318
Switzerland	-	-	-	130	70	78
United Kingdom	-	-	7	-	-	-
Totals	1,272	4,196	744	501	966	1,903

AUSTRALIAN SITUATION

Supply Position A revised estimate of the 1951 wheat crop in Australia places it at 161.4 million bushels, slightly lower than the earlier estimate of 166.7 millions. The reduction in the new crop means that total estimated supplies for the current crop year are now only 180.9 million bushels, a decline of 47.2 million from the 1950-51 figure. If domestic requirements remain at the 80 million bushel level, the amount available for export and carryover at the end of the crop year will be approximately 100 million bushels, as against 146 million in 1950-51.

Australian Wheat Supplies

Item	1951-52 1/	1950-51 2/
- million bushels -		
Carryover at November 30 (including flour as wheat)	19.5	43.9
New crop	161.4 3/	184.2
Total estimated supplies	180.9 3/	228.1
Less estimated domestic requirements for crop year	80.0	82.0
Available for export and carryover	100.9 3/	146.1
Deduct:		
Exports of wheat as grain, December 1-February 2	5.2	15.4
Exports of wheat flour in terms of wheat		
December 1-February 2	5.7	6.3
Total exports of wheat and wheat flour	10.9	21.8
Balance on February 3 for export and carryover	90.0	124.3

1/ Preliminary. 2/ Subject to revision. 3/ Revised.

Exports of wheat as grain in the period December 1 to February 2 of the current crop year amounted to 5.2 million bushels, only one-third as large as last year's total of 15.4 million for the comparable period. Major markets for this crop year's exports of wheat as grain have been New Zealand, the United Kingdom, India and Italy. Exports of wheat flour in terms of wheat, at 5.7 million bushels, were down about 10 per cent from the comparable period in 1950-51. The balance remaining on February 3, 1952 for export and carryover was estimated at 90.0 million bushels, compared with 124.3 million a year ago.

Revised Estimate of 1951-52 Crop In a cable dated February 25, 1952 the Commonwealth Statistician stated that the current wheat crop is now estimated at 161,360,000 bushels from 10,434,000 acres. This is slightly below earlier estimates, and is some 22.8 million bushels less than the 1950-51 crop of 184.2 million.

Australian Cable The following cable dated February 15, 1952, has been received from the Commercial Secretary for Canada (Agricultural) in Melbourne:

"Australian wheat stocks at January 26th totalled 135,080,000 bushels. Wheat exports from December 1st, 1951 to February 2nd totalled 5,152,000 bushels, with shipments during the preceding four weeks mainly to India, New Zealand and Italy. Flour exports for the same period were 110,114 long tons, with 17,723 going to Ceylon, 8,500 to Germany, 8,360 to Italy, 7,232 to Malaya and 1,957 to United Kingdom. During past month there was sale to New Zealand of 1 1/2 million bushels wheat and to Ceylon 48,000 tons flour, both outside IWA. Federal Government still considering proposals for incentives for increased wheat production."

URUGUAYAN SITUATION*

According to the second official estimate the area sown to wheat in Uruguay in 1951-52 was 541,291 hectares (1,337,000 acres), a 9 per cent increase over the previous season and exceeded only in 1937-38 when 556,394 hectares (1,375,000 acres) were sown. Production from the 1951-52 crop is officially estimated at 437,257 metric tons (16.1 million bushels), slightly over last season's output. The average yield per hectare at 808 kilos (12 bushels per acre) shows an 8 per cent reduction from last year. This decrease is due to late frosts and hailstorms which reduced the prospects for an excellent crop.

Area, Average Yield, and Production of Grain, Uruguay

Grain	Area Sown		Yield Per Acre		Production	
	1951-52	1950-51	1951-52	1950-51	1951-52	1950-51
	acres	acres	bu.	bu.	bu.	bu.
Wheat	1,337,000	1,224,000	12	13	16,066,000	15,974,000
Flax	371,000	386,000	12	9	4,369,000	3,543,000
Oats	171,000	158,000	16	14	2,768,000	2,215,000
Barley ...	60,000	67,000	15	17	899,000	1,131,000

*From report of Mr. W.B. McCullough, Commercial Secretary (Agricultural) Buenos Aires.

CALENDAR OF WHEAT EVENTS, FEBRUARY, 1952

- 7 - The Right Hon. C. D. Howe, in a statement summarizing developments in connection with the handling of tough and damp grain in Western Canada, announced that the Canadian Wheat Board had been negotiating for the use of drying facilities and storage space in the United States.
- 8 - A plan permitting United States portable grain driers, complete with crews, to enter Canada was announced by the Right Hon. J. G. Gardiner, Minister of Agriculture. Arrangements for entry of the machines without duty would be similar to those under which combining crews from the United States cross the border each year at harvest time.
- 16 - In order that milling grades of wheat dried in the country may be subject to the same milling and baking tests undertaken for grain dried at terminal elevators, the Board of Grain Commissioners for Canada ordered that all artificially dried wheat delivered to a licensed country elevator or shipped over a loading platform shall be declared as dried wheat, and when shipped, the notation "dried" shall be carried on the railway bill of lading. The order, effective February 20, will be in force for the remainder of the current crop year.

The Board of Grain Commissioners ordered that, effective February 18, wheat degraded "dried" on account of damage sustained through drying shall not be mixed with wheat of the grades of No. 4 Manitoba Northern, No. 4 Special or No. 3 Canada Western Garnet, while in store in a terminal elevator or on discharge from a terminal elevator.
- 18 - It was announced that the first cargo of tough wheat from Western Canada ever to go from Vancouver through the Panama Canal and across the Atlantic had arrived undamaged in the United Kingdom. Experimental shipments of tough wheat have also been cleared from Vancouver for Japan and India.
- 19 - Sharply increased basic prices payable to Argentine farmers for next crop season were announced by the I.A.P.I. (government-controlled trade promotion institute). The price for wheat has been advanced from 34 to 50 pesos per kilo (approximately \$1.85 to \$2.72 per bushel).
- 21 - The gross value of principal field crops grown on Canadian farms in 1951, based on average prices received by farmers during the first half of the current crop year, was estimated at a record level of just under two billion dollars. The farm value of the wheat crop, based on initial payments only, was placed at \$755 million.
- 25 - A revised estimate of the 1951 Australian wheat crop places it at 161.4 million bushels from 10.4 million acres.

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