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THE WHEAT REVIEW



MARCH, 1952

DOMINION BUREAU OF STATISTICS
Department of Trade and Commerce

THE
WHEAT REVIEW

MARCH, 1952

Published by
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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 March 1, 1952 in the four major exporting countries for export and carryover at the end of their respective crop years amounted to 898 million bushels. At the same time in 1951, 1,084 million were available. Supplies this year (in millions of bushels) were held as follows, last year's figures in brackets: Canada, 425 (311); United States, 385 (573); Australia, 84 (116); and Argentina, 3.8 (84). The current supply level is thus running some 17 per cent below that of a year ago. Moreover, the present estimate of supplies available for export and carryover includes some 150 million bushels of unharvested wheat which has remained over winter in the fields of Western Canada and, should it prove impossible to salvage all this grain, the current supply estimate will require downward revision.

World Demand Remains Strong World demand has remained active and it is anticipated that total exports from the four major exporters for the 1951-52 crop year will be above the previous season's level. While shipments from the two Southern Hemisphere countries are down sharply, the reduction is more than offset by much heavier movements from the United States and Canada. Exports from the United States for the current crop year are expected to be well in excess of 400 million bushels. Exports from Canada are also proceeding at a fairly high rate despite serious storage and transportation problems stemming from the necessity of handling large quantities of wet and damp grain.

Review of 1951 World Bread-grain Crop World breadgrain production in 1951 approximated 242 million short tons, according to the latest estimate of the Office of Foreign Agricultural Relations of the United States Department of Agriculture. Although about 1.8 million tons below the previous estimate, this is still about 5.3 million tons larger than in 1950 and, with the single exception of the 1938 harvest, is the largest breadgrain crop on record. The revision from the previous estimate occurred mainly in Argentina, where the outturn was even less than had been expected.

The bulk of the reduction from the earlier estimate was in wheat, which is now estimated at 6,500 million bushels, 50 million bushels less than the previous estimate. The current wheat estimate is 180 million bushels larger than in 1950 and about 475 million bushels above the prewar average (1935-39). The largest increase over the prewar level is noted in the United States estimate. A significant increase for Asia and lesser increases for Africa and the Soviet Union were offset by declines in the Southern Hemisphere countries, especially Argentina, and for Europe. Revisions in rye estimates since the earlier survey were comparatively small.

International Wheat Agreement Sales and Purchases Sales recorded by the International Wheat Council have been heavy during the past month. Transactions recorded by the Council from August 1, 1951 through March 14, 1952 (except for Canadian sales, which were reported through March 18) totalled 523.2 million bushels or just over 90 per cent of the 1951-52 guaranteed quantities. Details of transactions under the I.W.A. are set out in the following table. These data include flour in terms of wheat.

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	8,026	8,363	2,660
Belgium	20,209	11,065	-	-	8,745	19,810	399
Bolivia 3/	2,756	2,037	-	-	782	2,819	-
Brazil 3/	13,228	2,461	-	-	10,729	13,190	-
Ceylon 2/	6,614	-	5,166	-	1,404	6,570	-
Costa Rica 3/	1,213	777	-	-	430	1,207	-
Cuba	7,422	3,415	-	-	3,858	7,273	149
Denmark 3/	1,617	538	-	-	1,100	1,638	-
Dominican Republic 3/ ..	876	475	-	-	325	800	-
Ecuador	1,286	174	-	-	831	1,005	281
Egypt	14,697	-	-	-	7,609	7,609	7,088
El Salvador 3/	404	173	-	-	234	407	-
Germany	66,139	4	2,904	1,837	48,137	52,882	13,257
Greece	15,726	30	-	-	13,136	13,166	2,560
Guatemala 3/	919	239	-	-	684	923	-
Haiti 3/	1,029	419	-	-	684	1,103	-
Honduras Republic 2/ ..	367	170	-	-	197	367	-
Iceland	404	99	-	-	219	318	86
India	55,116	14,933	10,014	-	28,423	53,370	1,746
Indonesia 3/	3,674	29	1,946	-	1,825	3,800	-
Ireland	10,104	6,350	1,628	-	1,111	9,089	1,015
Israel	5,879	1,523	-	-	4,343	5,866	13
Italy	40,418	9,012	3,879	-	15,143	28,034	12,384
Japan	18,372	3,379	-	-	13,600	16,979	1,393
Lebanon 3/	2,388	8	-	-	2,452	2,460	-
Liberia 3/	37	25	-	-	11	36	-
Mexico	12,860	-	-	-	12,772	12,772	88
Netherlands 3/	24,802	6,805	2,856	-	15,238	24,899	-
New Zealand	4,593	-	4,549	-	-	4,549	44
Nicaragua 3/	331	195	-	-	127	322	-
Norway 3/	7,716	2,987	-	-	4,730	7,717	-
Panama 3/	625	303	-	-	321	624	-
Peru 3/	5,512	3,197	-	-	2,464	5,661	-
Philippines	7,202	3,040	3	-	2,673	5,716	1,486
Portugal	5,626	321	144	-	4,492	4,957	669
Saudi Arabia	1,837	-	52	-	1,439	1,491	346
Spain	4,373	1,102	-	-	1,102	2,204	2,169
Sweden 3/	2,756	-	1,493	-	1,319	2,812	-
Switzerland	6,430	3,417	-	-	2,107	5,524	906
Union of South Africa ..	11,023	5,600	-	-	2,053	7,653	3,370
United Kingdom	177,068	124,348	30,205	-	16,518	171,071	5,997
Venezuela 3/	6,246	4,679	-	-	1,421	6,100	-
Totals	580,917	213,593	64,839	1,910	242,814	523,156	
Guaranteed Quantities (Exporting Countries) .		232,979	88,700	4,089	255,149	580,917	
Balance		19,386	23,861	2,179	12,335	57,761	

1/ Canadian Sales through March 18, 1952.

2/ Sales recorded by International Wheat Council through March 14, 1952.

3/ Quota filled.

CANADIAN SITUATION

Handling Out-of-Condition Grain Creates Serious Problem

On March 7 the Right Hon. C. D. Howe, Minister of Trade and Commerce, made the following statement in the House of Commons with reference to the problem created by out-of-condition grain:

"As Members of the House know, the 1951 grain crop in the West was harvested under very unfavourable circumstances. Of the grain which was harvested last fall, a large proportion was threshed in a tough and damp condition, which has created unprecedented problems for producers themselves, for The Canadian Wheat Board, the Board of Grain Commissioners for Canada and for grain handling agencies. In addition, according to the Dominion Bureau of Statistics, about 150 million bushels of wheat and 135 million bushels of oats and barley still remain to be threshed.

According to the records of the Canadian Wheat Board, about 186 million bushels of tough and damp wheat, oats and barley have now been accepted at country elevators. This compares with 100 million bushels of tough and damp grain accepted at country elevators in the preceding crop year when the problem of out-of-condition grain was regarded as particularly serious.

Substantial progress has been made in disposing of tough wheat, oats and barley, and about 50 million bushels of tough and damp grain have been dried in terminal elevators at the Pacific Coast, at the Lakehead and in Interior Terminal Elevators. In addition, damp wheat is being shipped to the United States for drying. However, there are still substantial stocks of tough and damp grain in public storage and it will be some time before these stocks can be disposed of or dried.

In addition to the quantities of tough and damp grain delivered to the Board and the quantities of these deliveries which remain in store, there is a considerable quantity of damp grain which was threshed last fall and still remains on farms. On the basis of recent surveys carried out by the Board there were about 36 million bushels of threshed damp wheat on farms in the Prairie Provinces in mid-February. In addition, there were substantial quantities of threshed tough wheat and threshed tough and damp oats and barley on farms awaiting delivery.

The next sixty to eighty days will be critical from the standpoint of the delivery of present farm stocks of threshed out-of-condition grain. It is the policy to provide delivery opportunity for these farm stocks of tough and damp grain as soon as physically possible. It will be difficult to complete this task before the warm weather sets in. Producers having tough and damp grain on their farms will have to exercise unusual care in maintaining the condition of these stocks until they can be delivered at country elevators. This, broadly, is the problem which lies ahead in handling threshed out-of-condition grain now on farms.

In view of the circumstances which I have described, I would like to appeal to all producers with unthreshed grain on their farms to use their best efforts to see that their spring threshing does not add to the present problem of out-of-condition grain. Under the circumstances which now prevail, no assurance can be given that there will be a prompt delivery opportunity for grain which is harvested this spring in a tough or damp condition. It should also be emphasized

that if grain is threshed in the spring with a high moisture content and when the weather is warm, it would be most difficult for handling companies to maintain the condition of this grain in country elevators and while in transit to terminal elevators. This fact should be seriously considered by producers before undertaking the threshing of grain still in the fields in the Prairie Provinces.

It is apparent that even if spring harvesting is confined to the threshing of dry grain, deliveries of out-of-condition grain for the crop year 1951-52 will total at least 250 million bushels. This is an unprecedented quantity of out-of-condition grain to be received in any crop year, and is, and will continue to tax our grain handling facilities to the limit. While a large percentage of the threshed out-of-condition grain has now been delivered at country elevators, substantial farm stocks still remain in certain areas. These areas are now well defined and the extent of the remaining problem is known. To relieve these areas the best efforts of The Canadian Wheat Board, the Board of Grain Commissioners for Canada, the Transport Controller, the handling companies and the railways will be continued. With the co-operation of all concerned, and especially with the co-operation of producers in respect to their spring threshing, losses arising from the harvesting of so much out-of-condition grain from the 1951 crop can be held at minimum levels. The coming of an early spring will greatly assist in handling the over-all problem of out-of-condition grain, but will make it more difficult for producers to maintain the condition of tough and damp wheat on farms until delivery can be effected."

Supply Position As emphasized in the Minister's statement quoted above, attention continues to be focussed on marketing and handling problems resulting from the unusually adverse harvesting conditions experienced in Western Canada last fall. Despite the difficulties involved in the handling of such a large proportion of tough and damp grain, however, wheat has been moving through the various marketing channels from farms to forward positions in relatively heavy volume.

Country marketings of wheat by farmers in Western Canada during recent weeks have been averaging between five and six million bushels, well above the usual level for this time of year. Movement to forward positions has been reflected in the reduction of country elevator stocks at March 13 to below the hundred million bushel level for the first time since mid-October. The extent of the rail movement of wheat is shown by the fact that on March 13, 1952 some 13.9 million bushels were in rail transit in the Western Division as against only 2.9 million a year ago, while in the Eastern Division the comparable figures were 3.6 million and 1.4 million bushels, respectively. Reduction in country elevator stocks and the heavy rail movement are reflected in the build-up of stocks in forward positions, all well above the levels of a year ago.

Arrangements for drying grain both on and off farms have also been speeded up. It has been estimated that approximately 100 portable grain driers, most of which are believed to have been bought outright in the United States by farmers, are now operating on farms in Western Canada. Drying operations at terminal elevators are proceeding in volume, and up to March 13 some 38.4 million bushels of tough and damp wheat and 17.5 million bushels of other grain had been dried at terminal elevators in the Western Division. Details of these operations may be found in the table in the following section. In addition, Canadian wheat is now being shipped by rail to Duluth for drying and it is expected that drying facilities at Buffalo terminal elevators will be used following the opening of

lake navigation.

The statistical supply position for both the current and preceding crop years has been altered slightly through the revision of the July 31, 1951 carryover stocks to 189.2 million bushels. The revised carryover figure, together with the 1951 crop estimated at 562.4 million bushels, now gives total estimated supplies of 751.6 million for the current crop year. It should be noted, however, that this figure includes an estimated 150 million bushels of unharvested wheat.

Canadian Wheat Supplies

Item	1951-52 <u>1/</u>	1950-51
	- million bushels -	
Carryover in North America at July 31	189.2 <u>2/</u>	112.2
New crop	562.4	461.7
Imports of wheat, August 1—January 31	<u>3/</u>	<u>3/</u>
Total estimated supplies	751.6 <u>2/</u>	573.9
Less estimated domestic requirements for crop year	150.0	143.7 <u>2/</u>
Available for export and carryover	601.6 <u>2/</u>	430.2 <u>2/</u>
Deduct:		
Overseas clearances of wheat as grain		
August 1—February 29	129.7	81.1
Exports of Canadian wheat to U.S.,		
August 1—February 29	23.0	9.3
Total exports of wheat	152.7	90.3
Exports of wheat flour in terms of wheat,		
August 1—February 29	24.0 <u>4/</u>	29.2 <u>4/</u>
Total exports of wheat and wheat flour	176.8	119.5
Balance on March 1 for export and carryover	424.8	310.7

1/ Preliminary

2/ Revised

3/ Less than 50,000 bushels.

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

Exports of wheat as grain during February 1952 amounted to 18.6 million bushels, compared with 16.0 million in January and 10.3 million in February 1951. Total exports of wheat as grain for the first seven months of the current crop year, at 152.7 million bushels, were approximately 69 per cent above the 90.3 million exported during the August-February period of 1950-51. Some 48.8 million bushels, representing 32 per cent of this year's August-February 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, 22.0 (of which 3.3 million were for milling in bond); Belgium, 10.8; Japan, 8.9; and the Netherlands, 7.1.

Preliminary Customs returns indicate that exports of wheat flour in terms of wheat equivalent in February amounted to 3.1 million bushels, compared with 4.0 million in January and a revised total of 4.7 million in February 1951. Total exports of wheat flour in terms of wheat for the August-February period of the current crop year, at 24.0 million bushels, were down about 22 per cent from the 29.2 million exported during the first seven months of 1950-51. Combined exports of wheat and flour in terms of wheat during the first seven months of 1951-52 amounted to 176.8 million bushels, an increase of 57.3 million over the comparable period a year ago.

The balance remaining on March 1, 1952 for export and carryover was estimated at 424.8 million bushels, compared with 310.7 million a year ago. As noted above, however, this year's balance includes a considerable quantity of unharvested wheat and this fact should be given due consideration when comparing the statistical supply position of the two crop years.

Grain Drying at
Western Terminal Elevators

According to records of the Board of Grain Commissioners for Canada, 56 million bushels of tough and damp grades of wheat, oats, barley, rye and flaxseed had been dried at terminal elevators in the Western Division from the beginning of the current crop year up to March 13. Slightly more than half the total bushelage of the five grains consisted of damp grades (moisture content over 13.5 per cent for flaxseed; over 17 per cent for wheat, oats, barley and rye). Some 38.4 million bushels, representing 68.7 per cent of the total, consisted of tough and damp wheat.

Tough and Damp Grain Dried at Terminal Elevators, Western Division
August 1, 1951—March 13, 1952

Grain		Lakehead	Pacific Coast	Interior Points	Churchill	Total
- thousand bushels -						
Wheat 1/	Tough	4,059	12,062	1,496	-	17,617
	Damp	13,148	1,609	3,445	16	18,217
Durum Wheat	Tough	1,475	-	-	-	1,475
	Damp	1,124	-	2	-	1,126
Oats	Tough	916	46	1	-	963
	Damp	4,286	2	12	-	4,299
Barley	Tough	4,324	293	1	-	4,617
	Damp	4,581	60	15	-	4,655
Rye	Tough	659	-	-	-	659
	Damp	149	-	4	-	152
Flaxseed	Tough	1,986	-	-	-	1,986
	Damp	179	-	4	-	182
Totals	Tough	13,419	12,401	1,498	-	27,318
	Damp	23,466	1,670	3,480	16	28,632

1/ Other than Durum

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

Week ending	Manitoba	Saskatchewan	Alberta	Total	Last Year*
- bushels -					
August 9	59,493	620,562	1,338,831	2,018,886	942,807
16	93,082	524,729	211,439	829,250	187,897
23	112,590	497,186	242,210	851,986	884,628
30	403,058	679,813	235,332	1,318,203	3,004,682
September 6	477,903	209,692	118,184	805,779	17,079,804
13	850,575	2,122,084	1,267,183	4,239,842	20,915,650
20	2,286,507	8,117,947	3,442,011	13,846,465	18,718,298
27	3,990,641	12,437,527	3,671,494	20,099,662	36,817,488
October 4	1,140,960	4,811,683	1,580,259	7,532,902	20,857,886
11	3,642,881	8,909,082	4,002,911	16,554,874	9,913,670
18	6,829,154	25,964,251	10,890,756	43,684,161	15,342,219
25	2,889,123	16,901,420	7,418,838	27,209,381	9,282,832
November 1	1,764,548	8,346,796	3,662,096	13,773,440	11,425,054
8	1,233,784	5,432,322	2,799,173	9,465,279	13,106,208
15	1,059,468	4,113,854	2,472,007	7,645,329	11,805,491
22	752,098	4,567,360	2,705,307	8,024,765	10,841,810
29	675,980	4,545,904	2,946,092	8,167,976	8,453,757
December 6	552,962	5,371,868	4,418,351	10,343,181	7,320,744
13	707,055	5,969,556	3,927,366	10,603,977	6,620,807
20	648,927	4,237,451	2,064,504	6,950,882	8,563,235
27	620,366	4,148,578	1,636,761	6,405,705	6,437,088
January 3	228,260	3,841,896	1,263,521	5,333,677	4,560,268
10	981,598	5,300,345	2,190,317	8,472,260	3,878,629
17	716,958	4,321,164	2,327,375	7,365,497	5,662,980
24	299,222	2,068,288	870,199	3,237,709	3,013,360
31	200,888	1,811,128	983,209	2,995,225	1,363,719
February 7	343,978	3,503,572	2,361,619	6,209,169	1,295,513
14	192,499	3,435,437	1,599,885	5,227,821	1,491,550
21	569,279	3,083,216	1,894,428	5,546,923	1,942,935
28	340,702	2,780,067	1,352,687	4,473,456	2,330,563
March 6	301,234	3,753,527	1,931,959	5,986,720	1,340,074
13	349,398	3,796,031	1,689,609	5,835,038	469,727
Totals	35,315,171	166,224,336	79,515,913	281,055,420	265,871,373

*Revised.

Marketings of wheat by farmers in the Prairie Provinces from the beginning of the current crop year to March 13 amounted to 281.1 million bushels as against 265.9 million for the corresponding period of 1950-51. Unusually adverse harvesting conditions and serious handling problems kept this year's cumulative marketings below those of last year until the third week of February. Recently, however, weekly marketings have been averaging between 5 and 6 million bushels, well above the usual volume for this time of year. Farmers in Saskatchewan marketed 166.2 million bushels, or 59.1 per cent of this year's total while those in Alberta and Manitoba marketed 79.5 million and 35.3 million bushels, respectively, representing 28.3 per cent and 12.6 per cent.

Farmers' Marketings by Crop Districts 1950-51 Farmers in the Prairie Provinces and certain areas of British Columbia and Ontario marketed 367.8 million bushels of wheat during the 1950-51 crop year according to revised figures compiled by the Statistics Branch of the Board of Grain Commissioners.

In the following tables, farmers' deliveries are shown by the method of marketing employed, i.e., through country elevators, directly to interior private and mill elevators, etc. Deliveries to country elevators are, in turn, broken down by provinces and crop districts.

Farmers' Marketings of Wheat in the Western Division, 1950-51

Method of Marketing	Total Wheat
	- bushels -
Country elevators	363,272,769
Platform loadings	454,382
Interior public and semi-public terminals	110,050
Interior private and mill elevators	3,954,240
From farms direct to U.S.A. by truck <u>1/</u>	53,863
Total	367,845,304

1/ Customs returns, Dominion Bureau of Statistics.

Farmers' Marketings through Country Elevators, 1950-51

Province and District		Wheat (Other than Durum)	Durum Wheat	Total Wheat
		net bu.	net bu.	net bu.
<u>Manitoba</u>				
Crop District	1	2,388,720	698,043	3,086,763
	2	4,903,458	883,494	5,786,952
	3	6,324,773	3,001,935	9,326,708
	4	1,018,965	331,459	1,350,424
	5	984,236	6,252	990,488
	6	170,105	2,847	172,952
	7	5,161,916	229,851	5,391,767
	8	2,797,084	247,261	3,044,345
	9	2,505,792	112,793	2,618,585
	10	3,598,861	987	3,599,848
	11	3,052,311	5,351	3,057,662
	12	795,568	-	795,568
	13	2,104,890	929	2,105,819
	14	520,154	-	520,154
Totals		36,326,833	5,521,202	41,848,035
<u>Ontario</u>				
Country elevators in the Western Division		2,292	-	2,292
Totals		36,329,125	5,521,202	41,850,327

Farmers' Marketings through Country Elevators, 1950-51

Province and District	Wheat (Other than Durum)	Durum Wheat	Total Wheat
	net bu.	net bu.	net bu.
<u>Saskatchewan</u>			
Crop District 1A	7,960,568	788,111	8,748,679
1B	5,933,299	66,328	5,999,627
2A	10,227,557	519,049	10,746,606
2B	15,717,601	2,294,798	18,012,399
3AN	7,661,764	1,023,614	8,685,378
3AS	16,284,379	1,986,051	18,270,430
3BN	11,139,134	944,449	12,083,583
3BS	7,644,881	776,290	8,421,171
4A	1,575,701	92,835	1,668,536
4B	3,591,923	527,292	4,119,215
5A	14,442,232	115,975	14,558,207
5B	13,734,289	15,521	13,749,810
6A	15,479,431	826,771	16,306,202
6B	13,145,441	132,206	13,277,647
7A	16,156,587	431,269	16,587,856
7B	7,865,042	10,836	7,875,878
8A	10,774,851	-	10,774,851
8B	12,815,009	6,937	12,821,946
9A	13,458,642	-	13,458,642
9B	10,149,946	6,884	10,156,830
Totals	215,758,277	10,565,216	226,323,493
<u>Alberta</u>			
Crop District 1	9,332,104	327,644	9,659,748
2	9,766,685	819	9,767,504
3	3,082,507	128,598	3,211,105
4	11,507,520	198,462	11,705,982
5	5,713,400	13,764	5,727,164
6	14,560,598	6,061	14,566,659
7	10,790,203	-	10,790,203
8	8,588,294	105	8,588,399
9	1,091,859	-	1,091,859
10	7,231,108	444	7,231,552
11	2,802,180	21	2,802,201
12	438,395	-	438,395
13	1,626,107	-	1,626,107
14	2,221,868	-	2,221,868
15	1,087,075	-	1,087,075
16	3,491,380	-	3,491,380
Totals	93,331,283	675,918	94,007,201
<u>British Columbia</u>	1,091,748	-	1,091,748
Grand Totals	346,510,433	16,762,336	363,272,769

Visible Supply of Canadian Wheat, March 13, 1952, Compared with
Approximately the Same Date, 1951 and 1950

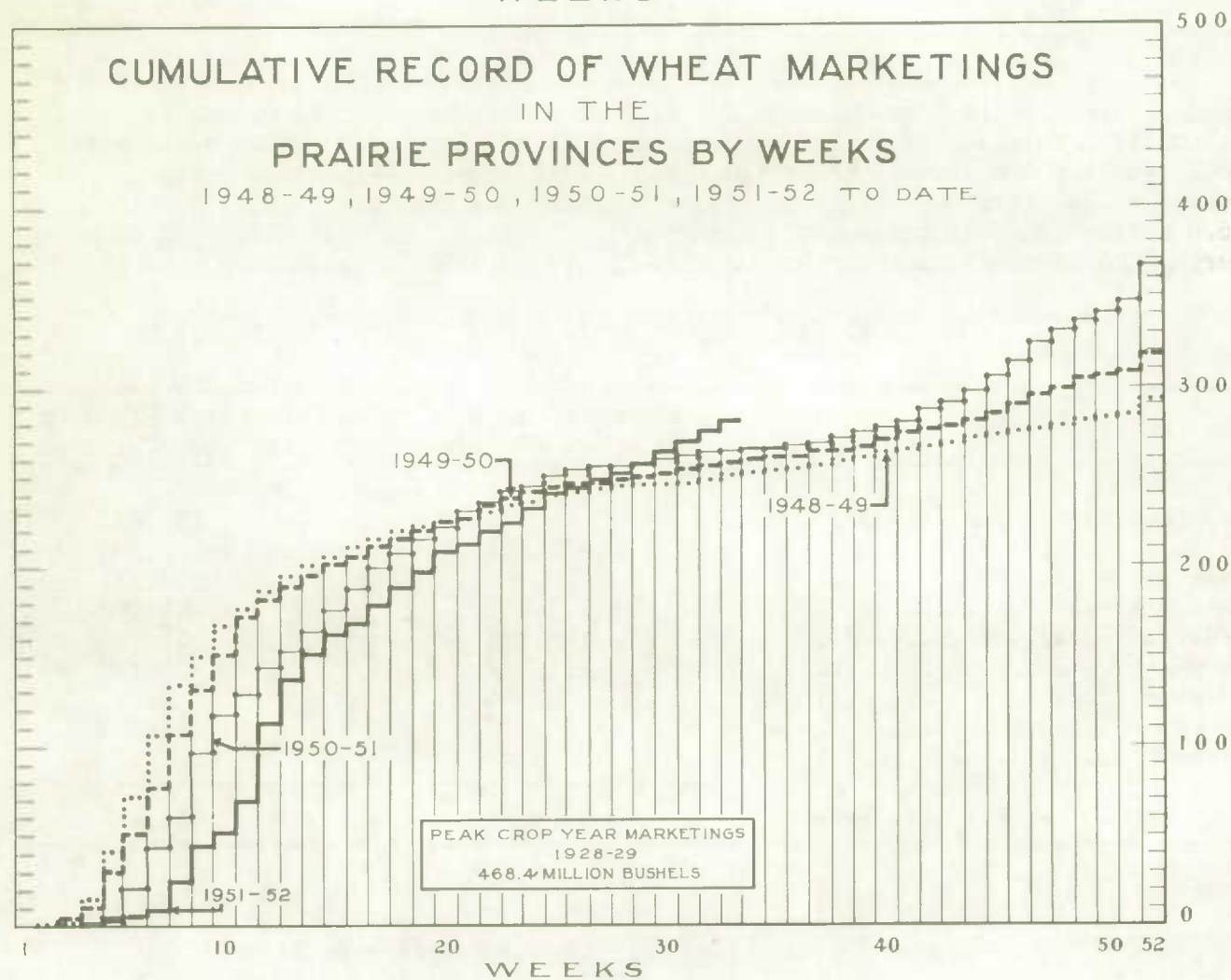
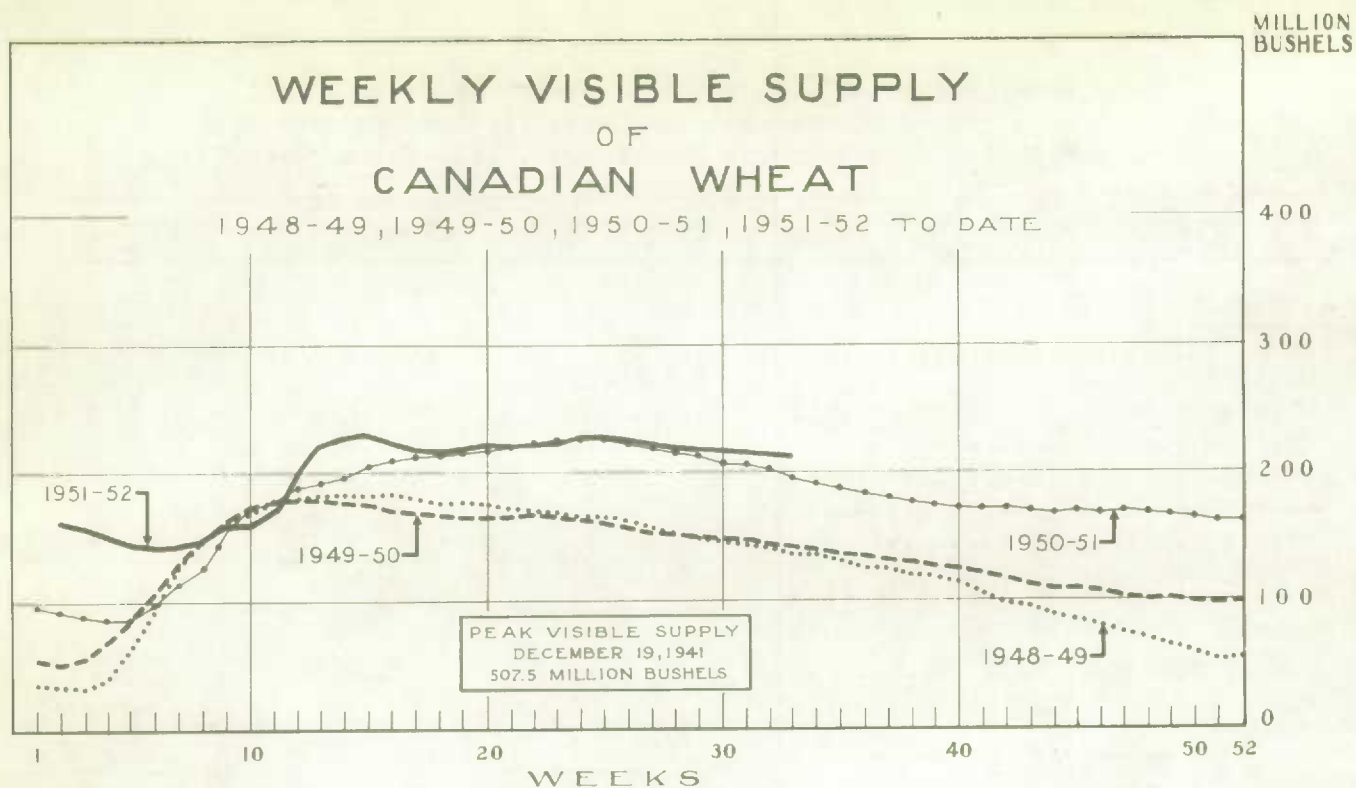
Position	1952	1951	1950
- thousand bushels -			
Country elevators - Manitoba	8,476	11,138	3,250
Saskatchewan	60,024	68,856	26,242
Alberta	30,593	42,351	32,162
Totals	99,093	122,345	61,654
Interior private and mill elevators	6,087	4,594	3,331
Interior terminals	11,233	9,417	69
Vancouver-New Westminster	9,467	4,379	3,132
Prince Rupert	401	-	-
Churchill	1,997	461	126
Fort William-Port Arthur	40,120	36,004	44,403
Storage afloat	-	-	347
In transit rail (Western Division)	13,903	2,884	6,902
Bay, Lake and Upper St. Lawrence Ports	15,010	9,370	9,507
Lower St. Lawrence and Maritime Ports	7,231	3,707	7,920
Storage afloat (Eastern Division)	2,599	366	2,686
In transit rail (Eastern Division)	3,594	1,370	901
United States ports	2,934	598	115
In transit U.S.A.	-	471	5
Totals	213,669	195,967	141,098

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

Grade	1951-52		1950-51		Average 1946-47—1950-51
	cars	per cent	cars	per cent	per cent
1 Northern	847	0.6	4,624	4.7	14.8
2 Northern	7,600	5.4	17,114	17.4	37.6
3 Northern	20,911	14.8	15,301	15.6	13.0
4 Northern	12,273	8.7	11,279	11.5	4.4
5 Wheat	10,546	7.5	10,151	10.3	3.7
6 Wheat	8,424	6.0	6,842	7.0	2.2
Feed Wheat	1,186	0.8	1,738	1.8	0.4
Garnet	464	0.3	1,058	1.1	0.9
Amber Durum	2,218	1.6	2,989	3.0	3.5
Alberta Winter	281	0.2	392	0.4	0.7
Toughs 1/2/	52,645	37.3	19,005	19.4	15.6
Damps 1/3/	22,607	16.0	6,782	6.9	1.3
All Others	1,003	0.7	839	0.9	1.9
Totals	141,005	100.0	98,114	100.0	100.0

1/ All varieties and grades.

2/ Moisture content 14.9 to 17 per cent for durum, 14.6 to 17 per cent for all other varieties. 3/ Moisture content over 17 per cent.



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

Wheat Shipments to the United States by Destination
August 1, 1951 to March 13, 1952
Compared with Approximately the Same Period, 1950-51 and 1949-50

Destination	1951-1952	1950-1951	1949-1950
- bushels -			
<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	293,075	72,225
Other U.S.A. Points	3,714,366	1,954,442	147,000
Totals, Rail Shipments	5,617,782	2,247,517	219,225
Grand Totals	26,584,395	11,044,629	7,150,673

Rail Shipments of wheat to the United States during the four weeks ending March 13, 1952 amounted to 0.5 million bushels as against 0.9 million and 0.1 million 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 March 13 totalled 26.6 million bushels, up sharply from the 11.0 million and 7.2 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

Ports	August 1, 1951 to February 29, 1952	August 1, 1950 to February 28, 1951
- bushels -		
Collingwood	34,600	636,604
Midland	3,274,421	2,413,538
Owen Sound	1,099,885	396,675
Port McNicoll	2,173,813	2,085,592
Goderich	123,745	246,053
Sarnia	287,788	72,398
Walkerville	1,786	-
Toronto	5,672	13,333
Prescott	1,500	-
Totals	7,003,210	5,864,193

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

Month	1951-52	1950-51	1949-50	1948-49
		- bushels -		
August	283,914	122,532	158,893	51,283
September	435,068	123,256	131,711	30,017
October	159,667	73,543	122,482	46,274
November	465,193	133,847	92,334	138,600
December	1,387,827	1,517,624	342,946	1,740,405
January	5,839,567	4,394,047	277,502	3,794,391
February	3,618,007	3,303,248	240,087	3,720,733
March		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 February 1952 amounted to 3.6 million bushels, well below the 5.8 million shipped in January. This year's February shipments, however, were in line with those for the same month in 1951 and 1949 when the totals were 3.3 million and 3.7 million bushels, respectively. In 1949-50, when rail shipments from the Lakehead for the entire crop year amounted to only 4.4 million bushels, February shipments accounted for some 0.2 million. Total rail shipments of wheat from the Lakehead for the first seven months of the current crop year amounted to 12.2 million bushels as against 9.7 million and 1.4 million bushels, respectively, for the comparable periods in 1950-51 and 1949-50.

Distribution of the February 1952 shipments by grade and destination is shown in the table below. Some 2.4 million bushels, representing about 67 per cent of the total, went to destinations in the Maritime Provinces.

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

Grade	P.E.I.	N.S.	N.B.	Que.	Ont.	U.S.A.
				- bushels -		
1 Northern	-	-	-	-	-	2,400
2 Northern	-	-	-	-	-	26,000
3 Northern	-	330,000	690,000	-	3,000	76,500
4 Northern	-	600,500	22,000	3,042	17,500	55,000
5 Wheat	-	146,000	-	1,917	63,000	-
6 Wheat	-	1,500	-	3,183	1,333	-
Feed Wheat	-	-	-	1,500	-	-
Amber Durum	3,000	-	263,000	49,000	92,963	-
Alberta Winter	-	-	-	-	1,344	-
Toughs	167	3,500	338,000	301,167	366,129	8,000
Damps	-	-	-	-	-	3,000
All Others	-	12,000	11,326	56,054	64,982	-
Totals	3,167	1,093,500	1,324,326	415,863	610,251	170,900

Freight Assistance Shipments Claims filed for payment up to February 29, 1952 represent shipments of 8.0 million bushels of wheat from the Prairie Provinces to Eastern Canada and British Columbia under the Freight assistance plan during the first six months of the current crop year. This year's preliminary total, subject to upward revision with the filing of additional claims, is already about 10 per cent greater than the revised total of 7.3 million bushels shipped during the August-January period of 1950-51.

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

Month	Nfld.	P.E.I.	N.S.	N.B.	Que.	Ont.	B.C.	Total
- thousand bushels -								
August, 1951	3	29	66	59	516	408	229	1,310
September	4	17	56	39	463	467	219	1,266
October	7	14	71	54	559	511	215	1,430
November	9	23	84	60	761	659	192	1,789
December	4	20	66	32	469	469	136	1,196
January, 1952	3	18	40	33	486	434	15	1,028
Totals <u>1/</u>	30	119	383	276	3,254	2,949	1,007	8,019
Same period 1950-51								
Preliminary <u>2/</u>	21	97	328	200	2,786	2,183	977	6,592
Revised <u>1/</u>	23	106	370	225	2,939	2,341	1,304	7,308

1/ Based on claims filed up to February 29, 1952.

2/ Based on claims filed up to February 28, 1951.

Preliminary data on millfeed shipments from August 1 to February 29 of the current crop year indicate a total of 245,599 tons moving under the freight assistance plan. This year's total, based on claims filed up to February 29, is about 4 per cent below the preliminary total for the corresponding period of 1950-51. Revised figures for the August-January period of 1950-51 show a total of 297,266 tons shipped under the plan.

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

Province	August 1, 1951 to January 31, 1952	August 1, 1950 to January 31, 1951	
	Preliminary <u>1/</u>	Preliminary <u>2/</u>	Revised <u>1/</u>
- tons -			
Newfoundland	1,452	1,628	1,940
Prince Edward Island .	3,322	4,333	5,412
Nova Scotia	19,954	21,162	24,723
New Brunswick	16,333	15,826	18,820
Quebec	119,194	120,130	136,867
Ontario	66,130	75,235	84,474
British Columbia	19,214	17,977	25,030
Totals	245,599	256,291	297,266

1/ Based on claims filed up to February 29, 1952.

2/ Based on claims filed up to February 28, 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	4,033	39,550	34,671
December	12,075	4,701	3,249	20,025	37,347
January	14,382	1,620	4,044	20,047	18,523
February	16,010	2,574	3,103	21,687	18,472
Totals	129,709	23,029	24,012	176,750	182,569

^{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 November, 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	November	February		August—February	
	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	1,743,183	848,515	4,585,736	8,260,402	48,770,922
<u>Africa</u>					
Rhodesia	-	-	-	-	3,733
Union of South Africa	-	-	1,061,525	-	1,804,272
<u>British West Africa</u>					
Gambia	1,377	689	-	3,672	-
Gold Coast	24,966	-	-	109,525	-
Nigeria	15,673	6,241	-	53,774	-
Sierra Leone	4,932	3,992	-	26,947	-
<u>Asia</u>					
Aden	-	6,421	-	32,134	-
British Malaya	-	4,865	-	22,086	-
Hong Kong	61,668	171,472	-	683,716	-
India	-	-	2,298,240	90	5,953,360
<u>Europe</u>					
Gibraltar	18,644	2,894	-	128,872	-
Malta	-	-	-	-	795,301
<u>North America</u>					
Bahamas	16,564	11,678	-	137,534	-
Barbados	45,679	48,487	-	274,972	775
Bermuda	10,732	10,341	-	66,672	-
British Honduras	3,519	3,663	-	31,676	-
Jamaica	78,948	4,091	-	753,589	-
Leeward-Windward Is.	74,907	82,269	-	505,642	-
Trinidad and Tobago	192,065	194,382	-	1,496,115	-
<u>South America</u>					
British Guiana	55,832	58,018	-	514,984	-
Totals					
Commonwealth Countries ..	2,348,689	1,458,018	7,945,501	13,102,402	57,328,363
<u>FOREIGN COUNTRIES</u>					
<u>Africa</u>					
Azores and Madeira	1,607	-	-	15,021	-
Belgian Congo	9,072	45,018	-	237,672	-
Canary Islands	-	-	-	45,995	-
Egypt	-	27,000	-	27,000	424,015
French Africa	-	-	369,970	6,800	2,589,410
Liberia	459	684	-	4,631	-
Morocco	2,146	33,485	-	314,415	-
Portuguese Africa	104,148	10,202	-	138,456	-
Tripoli	-	-	-	-	445,180
<u>Asia</u>					
Arabia	-	56,277	-	79,645	-
Indonesia	2,525	34,438	-	58,446	-
Iraq	-	-	-	513	-
Israel	-	-	-	-	965,200
Japan	28,044	1,143	1,759,825	173,920	8,904,470
Philippine Islands	420,142	596,047	-	3,072,496	-
Portuguese Asia	9,675	2,295	-	30,839	-
Siam	11,898	19,768	-	98,451	-
Syria	245,736	-	112,048	1,034,761	2,398,180

Exports of Canadian Wheat and Wheat Flour, 1951-52

Destination	November	February		August—February	
	Wheat Flour 1/2/ - bushels -	Wheat Flour 2/ - bushels -	Wheat 3/ - bushels -	Wheat Flour 2/4/ - bushels -	Wheat 3/ - bushels -
FOREIGN COUNTRIES					
<u>Europe</u>					
Belgium	-	-	858,228	-	10,760,968
Denmark	-	459	-	918	537,600
France	2,020	-	1,622,406	6,471	3,945,137
Germany	-	82,832	-	88,101	6,280,666
Greece	-	-	-	19,161	-
Iceland	-	9,072	-	86,819	-
Ireland	-	-	349,533	-	4,863,668
Italy	2,754	-	1,637,067	44,356	5,027,944
Netherlands	-	-	124,133	-	7,071,721
Norway	-	-	270,667	-	2,441,309
Portugal	1,985	9,067	-	24,124	-
Spain	-	-	-	-	304,500
Sweden	-	-	-	-	1,313,418
Switzerland	-	-	401,334	-	5,550,057
Yugoslavia	6,655	-	-	25,016	1,092,277
<u>North America</u>					
Costa Rica	20,538	35,577	-	214,933	41,867
Cuba	329,319	139,001	-	1,557,118	500
Dominican Republic	18,810	19,395	2,400	136,763	3,800
El Salvador	26,442	38,925	-	196,420	-
French West Indies	481	-	-	2,822	-
Guatemala	59,036	48,299	-	258,566	-
Haiti	46,768	22,185	-	294,678	-
Honduras	463	-	-	2,987	10,000
Netherlands Antilles	14,269	16,794	-	114,966	-
Nicaragua	26,914	26,487	-	126,220	-
Panama	23,836	11,313	-	141,714	-
St. Pierre-Miquelon	1,827	113	-	10,188	-
United States					
Flour in terms of wheat ...	21,978	10,525	-	252,296	-
For grinding in bond 5/....	-	-	415,991	-	3,345,518
For domestic use 5/	-	-	2,158,286	-	19,683,456
Virgin Islands	1,638	1,107	-	7,996	-
<u>Oceania</u>					
French Oceania	-	7,587	-	27,432	-
Guam	-	-	-	45	-
Hawaii	-	6,656	-	6,656	-
<u>South America</u>					
Bolivia	-	-	454,688	2,295	747,382
Brazil	-	-	-	-	3,093,812
Chile	-	-	-	-	2,214,504
Colombia	18,526	29,551	5,385	141,524	233,322
Ecuador	42,754	32,783	-	225,585	55,115
Peru	-	-	96,801	-	1,064,204
Surinam	7,951	11,920	-	57,973	-
Venezuela	174,326	258,592	-	1,496,862	-
Totals,					
Foreign Countries	1,684,742	1,644,597	10,638,762	10,910,066	95,409,200
Grand Totals	4,033,431	3,102,615	18,584,263	24,012,468	152,737,563

1/ Exports for November, 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 November, 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.

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

Class and Grade	Week ending			
	March 1	March 8	March 15	March 22
- cents and eighths per bushel -				
<u>Initial Payment to Producers 1951-52 Pool</u>				
1 Hard	160	160	160	160
1 Northern	160	160	160	160
2 Northern	157	157	157	157
3 Northern	154	154	154	154
4 Northern	146	146	146	146
5 Wheat	136	136	136	136
6 Wheat	126	126	126	126
Feed Wheat	120	120	120	120
<u>Domestic and Export 1/</u> <u>(International Wheat Agreement)</u>				
1 Hard	180/1	180	179/4	179/1
1 Northern	180/1	180	179/4	179/1
2 Northern	178/1	178	177/4	177/1
3 Northern	176/1	176	175/4	175/1
4 Northern	170/1	170	169/4	169/1
5 Wheat	167/1	167	166/4	166/1
6 Wheat	157/1	157	156/4	156/1
Feed Wheat	151/1	151	150/4	150/1
1 C.W. Garnet	178/1	178	177/4	177/1
2 C.W. Garnet	177/1	177	176/4	176/1
3 C.W. Garnet	174/1	174	173/4	173/1
1 Alberta Red Winter	180/1	180	179/4	179/1
2 Alberta Winter	178/1	178	177/4	177/1
3 Alberta Winter	176/1	176	175/4	175/1
1 C.W. Amber Durum	180/1	180	179/4	179/1
2 C.W. Amber Durum	178/1	178	177/4	177/1
3 C.W. Amber Durum	177/1	177	176/4	176/1
<u>Export - Class II</u>				
1 Hard	237/6	234/3	230/1	229/1
1 Northern	237/6	234/3	230/1	229/1
2 Northern	235/6	232/3	228/1	227/1
3 Northern	233/6	230/3	226/1	225/1
4 Northern	227/6	224/3	220/1	219/1
5 Wheat	173/1	173	172/4	172/1
6 Wheat	163/1	163	162/4	162/1
Feed Wheat	157/1	157	156/4	156/1
1 C.W. Amber Durum	239/6	237/5	236/4	236/1
2 C.W. Amber Durum	237/6	235/5	234/4	234/1
3 C.W. Amber Durum	236/6	234/5	233/4	233/1

1/ Plus 6 cents carrying charge.

CANADIAN FLOUR MILLING SITUATION

Production Wheat flour production reported by Canadian mills for February 1952 amounted to 1.8 million barrels, down about 2 per cent from the preceding month and about 9 per cent from the February 1951 output. Mills reporting operations during February 1952 had a rated daily capacity of 97,864 barrels and, on the basis of a 25-day working period, 74.1 per cent of this capacity was effective. Mill grindings during the month totalled 8.4 million bushels, compared with 8.5 million in January 9.1 million in February 1951.

Exports According to preliminary Customs returns, exports of Canadian wheat flour during February 1952 amounted to 689,470 barrels (3.1 million bushels of wheat equivalent). Altogether, flour shipments went to 49 different countries and colonies, with the largest amount, some 0.8 million bushels of wheat equivalent going to the United Kingdom. Other shipments in excess of 100,000 bushels of wheat equivalent went to the Philippine Islands, Venezuela, Trinidad and Tobago, Hong Kong, and Cuba.

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
<u>1951-52</u>			
August	7,747,885 ^{2/}	1,699,569 ^{2/}	573,624
September	8,173,807 ^{2/}	1,797,624 ^{2/}	700,228
October	8,832,670 ^{2/}	1,926,302 ^{2/}	855,721
November	8,957,474 ^{2/}	1,944,215 ^{2/}	896,318
December	8,064,982 ^{2/}	1,755,062 ^{2/}	722,032
January	8,505,951 ^{2/}	1,844,408 ^{2/}	898,711
February	8,378,104 ^{2/}	1,812,383 ^{2/}	689,470
Totals	58,660,873	12,779,563	5,336,104

^{1/} Based on Customs returns. Exports for the crop years 1945-46 to 1950-51 and August to November, 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 According to the March 10 issue of The Wheat Situation, domestic disappearance of wheat in 1951-52 is expected to total about 715 million bushels, somewhat lower than had been previously estimated. Total disappearance is expected to be about 1,115 million bushels, the largest since 1948. This estimate, however, may be exceeded in view of the fact that 305.9 million bushels of wheat and wheat products in terms of wheat were exported during the first 8 months of the current crop year. Should this rate of exports be maintained during the March-June period, total exports would be closer to 450 million bushels than to the 400 million previously estimated. In any event, it appears that the carryover at the end of the current crop year will be substantially lower than last year's level of 396.3 million.

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-February 29 ..	21.7	3.3
Total estimated supplies <u>2/</u>	1,405.5	1,449.5
Less estimated domestic requirements for crop year <u>3/</u> ...	715.0 <u>4/</u>	696.3
Available for export and carryover	690.5	753.2
Deduct:		
Exports of wheat as grain, July 1-February 29	276.8	154.3
Exports of wheat flour and macaroni in terms of wheat, July 1-February 29.....	29.1	25.4
Total exports of wheat, wheat flour and macaroni ...	305.9	179.7
Balance on March 1 for export and carryover	384.6	573.5

1/ Preliminary.

2/ Excluding imports for March-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.

4/ Revised.

Preliminary data on exports of wheat as grain in the July-February period of the current crop year indicate a total of 276.8 million bushels as against 154.3 million for the comparable period in 1950-51. In addition, exports of wheat flour and macaroni in terms of wheat amounted to 29.1 million bushels, an increase of 3.7 million over the first 8 months of last crop year. Total exports of wheat,

wheat flour and macaroni, at 305.9 million bushels, were up by 70 per cent over last year's comparable figure of 179.7 million. The balance remaining on March 1, 1952 for export and carryover was estimated at 384.6 million bushels as against 573.5 million a year ago.

Prospective Plantings of Spring Wheat

The following report on prospective plantings of spring wheat in the United States is taken from the March 19 report of the Crop Reporting Board, Bureau of Agricultural Economics, United States Department of Agriculture:

"According to farmers' reported intentions as of March 1, the 1952 seedings of all spring wheat are expected to total 21,998,000 acres. This is one per cent less than in 1951, but 17 per cent more than the 10-year average. A total of 78,255,000 acres of all wheat is indicated by combining the prospective acreage of all spring wheat with the seeded acreage of winter wheat as estimated last December. The combined seeded acreage in 1951 was 78,059,000 acres.

A two per cent increase in spring wheat acreage in the North Central States was more than offset by a 9 per cent decrease in the Mountain and Pacific Northwest States. If farmers' intentions materialize, the acreage of spring-sown wheat will exceed that of 1951 in Minnesota, North Dakota, South Dakota and Utah. No change in acreage is indicated for Nebraska, Wyoming and New Mexico, while smaller acreages are expected for all other States. In Montana, the prospective 4,631,000 acres is 3 per cent less than was seeded a year ago. Intended spring seedings of wheat in Washington, Oregon, and Idaho are reported to be smaller than last year's acreage by 38, 33, and 12 per cent, respectively. With the fall sown wheat wintering under mostly favourable conditions in the Pacific Northwest, the reseeding of abandoned winter wheat land to spring wheat is likely to be less than in the spring of 1951, when considerable wheat was winterkilled.

Intended plantings of durum wheat, indicated at 2,344,000 acres, are about 9 per cent smaller than the 1951 seedings, and 11 per cent smaller than average. The intended 1952 seedings of durum, compared with 1951, point to declines of 17 per cent for Minnesota, 10 per cent for North Dakota, and 5 per cent for South Dakota. In North Dakota, the sharpest cuts are indicated in the main growing area, where growers expect to shift to hard spring wheat since the latter crop matures slightly earlier than durum wheat. The 15B rust threat and experience with late, rainy harvest seasons the past two years are important factors contributing to this shift in farming plans. The acreage of other spring wheat in these States is expected to be larger than a year ago, with intended increases reported at 10 per cent in Minnesota, 5 per cent in North Dakota, and 2 per cent in South Dakota.

Production of all spring wheat may be about 307 million bushels, if the intended acreage is planted, and if yields per seeded acre should equal the 1946-50 average, by States. Production of all wheat would be indicated at about 1,225 million bushels by combining this spring wheat production with a winter wheat crop of approximately 918 million bushels as forecast last December."

Flour Production

In a report released on March 17, the Bureau of the Census, Department of Commerce, estimated January wheat flour production at 21,212 thousand sacks, or an average of 964 thousand sacks per working day, compared with 919 thousand sacks per working day in December and 1,009 thousand sacks per day in January 1951.

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	
February 25, 1952	249 1/4 - 250 3/4		February 25, 1952	244 5/8	
26	246 1/2 - 249 3/4		26	242 7/8	
27	245 - 246 1/2		27	242 3/4	
28	247 1/2 - 250		28	243 3/4	
29	246 1/2 - 248 1/2		29	243 5/8 - 244 5/8	
March 1	246 3/4 - 249		March 1	243 7/8 - 244 7/8	
3	246 - 248 1/2		3	241 3/4 - 243 3/4	
4	246 1/4 - 246 3/4		4	242 1/4 - 244 1/4	
5	247 1/2 - 248		5	242 7/8 - 244 7/8	
6	247 - 247 3/4		6	243 5/8 - 245 5/8	
7	248 3/4 - 250 1/4		7	243 3/4 - 245 3/4	
8	248 - 250		8	243 7/8 - 245 7/8	
10	249 1/2 - 251 1/4		10	244 3/4 - 246 3/4	
11	249 1/2 - 251 1/2		11	244 3/4 - 246 3/4	
12	250 - 251 3/4		12	243 - 245	
13	250 1/2 - 251 1/4		13	243 1/2 - 245 1/2	
14	249 - 251		14	244 - 246	
15	249 3/4 - 250 1/2		15	245 1/2 - 247 1/2	
17	250 3/4 - 253 3/4		17	246 3/4 - 248 3/4	
18	251 - 252		18	245 - 247	
19	250 3/4 - 252 1/2		19	245 1/8 - 247 1/8	
20	249 1/2 - 251 1/4		20	244 3/8 - 246 3/8	
21	250 1/2 - 252 1/2		21	243 3/4 - 245 3/4	
22	250 - 251 1/2		22	243 1/2 - 245 1/2	
24	249 1/4 - 250		24	242 7/8 - 244 7/8	

Chicago Wheat Futures, High Points of Closing

Date	March	May	July	September	December
	- cents and eighths per bushel -				
February 25, 1952	253/6	251/7	245/7	247	250
26	252/3	250/3	244/4	245/6	248/5
27	252/2	250/3	244/6	246/1	249/1
28	253/6	251/3	245/2	246/4	249/2
29	253/3	251	244/7	246/2	249
March 1	253/5	251/1	245/1	246/2	249/1
3	252	249/2	243/1	244/5	247/5
4	251/7	249/6	243/6	245/4	248/6
5	252/6	250/1	244	245/7	249
6	253/6	251/4	245/3	247	250
7	253/3	251/1	244/7	246/4	249/6
8	253/4	251/3	245/2	247	250/2
10	255/2	252/7	245/7	247/4	250/6
11	254/6	252/6	245/5	247/2	250/4
12	253/5	251/7	244/4	246	249/3
13	253	251	244/5	246/1	249/2
14	253/4	252/1	245/3	247	250/2
15	255/7	254	246/4	248/2	251/2
17	257/4	255/1	247	248/3	251/4
18	254/5	254/1	245/5	247/1	250/2
19	253/4	254/1	245/5	247/1	250/3
20	252/6	253/1	244/6	246/2	249/6
21	251/4	251/7	243/6	245/2	248/5
22	252/2	252/1	244/2	245/5	249/1
24		251/2	243/4	244/6	248/1

ARGENTINE SITUATION

Supply Position While there have been no official estimates of the size of the current Argentine wheat crop, trade estimates remain unchanged at 84.5 million bushels. This unusually small crop, together with the carryover of 11.0 million bushels, provides total wheat supplies of only 95.5 million bushels compared with an estimated 220.4 million in 1950-51. Reduction of total supplies to a level below that of usual domestic requirements has been accompanied by various measures aimed at conserving available supplies, and has also meant the virtual elimination of Argentina as a wheat exporter during the current crop year. Exports of wheat for the first three months of 1951-52 amounted to only 3.5 million bushels as against 22.4 million in the December-February period of 1950-51. The estimated balance remaining on March 1 for export and carryover was 3.8 million bushels, compared with 83.8 million a year ago.

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—February 29 ..	3.5	22.4
Exports of wheat flour in terms of wheat, December 1—February 29	<u>3/</u>	<u>3/</u>
Total exports of wheat and wheat flour	3.5	22.4
Balance on March 1 for export and carryover	3.8	83.8

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

2/ Subject to revision.

3/ Less than 50,000 bushels.

The following account of the Argentine grain situation has been extracted from a report from Mr. W. B. McCullough, Commercial Secretary (Agricultural) at Buenos Aires, under date of March 14, 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 Argentina is again suffering from drought conditions. Throughout the grain and live-stock zones rainfall has been light and scattered since early January, accompanied by prolonged periods of high temperatures. In the vicinity of Buenos Aires a shower on March 11 was the first rain for over two months. The corn and sunflower crops have been seriously damaged from the drought

and in some districts these crops are lost.

Pastures are in very poor condition and ranchers are being forced to lighten them in proportion to feed, mainly roughage, available.

There were general rains on March 10 which will afford some relief but ploughing has been delayed so that farmers are already behind in preparing land for sowing coarse grain for winter pasture. There are no reserves of soil moisture and additional rainfall is urgently needed.

In order to conserve the diminishing supplies of fresh milk the manufacture of cheese, evaporated milk, etc. has been temporarily prohibited in specified areas, mainly those supplying fresh milk to the city of Buenos Aires and other urban centers.

1951-52 Wheat Crop There has been no official estimate published on the current wheat crop but the trade continue to place it in the vicinity of 2.3 million tons (84.5 million bushels) as against 5.8 million (213.1 million bushels) last year. With a small carryover of around 300,000 tons (11.0 million bushels) this leaves Argentina with a deficit in wheat for the current crop year. The crop from the northern grain belt was virtually lost and it has been necessary to transport wheat from the southern ports of Necochea and Bahia Blanca to Santa Fe in order to supply the mills in that area. With the exception of small remnant shipments to Peru and Paraguay there is no activity in the wheat market.

Campaign against "Caries" in Wheat The Ministry of Agriculture have initiated a campaign to combat "caries" (covered smut) in wheat, in order to increase production and quality of the grain. In addition to radio and other propaganda, experts from the Ministry of Agriculture are demonstrating methods of control in the appropriate areas of the wheat zones.

New Grain Prices In a radio broadcast on February 12 President Perón announced the new official producer prices for the 1952-53 crops. These reflect the Government's grave anxiety over declining production and marks an apparent change in agricultural policy. The new prices represent an increase of 47 per cent for wheat and 30 per cent for flax over those established for the last harvest and are the sharpest increases for any year since the policy of fixing official producer prices was initiated. The announcement also indicates an apparent change in official policy inasmuch as these substantial increases for grain, bringing the prices more in line with international levels, have been announced well in advance of seeding time. In the past the official prices for wheat and flax were not made public until near planting time while those for coarse grains were sometimes delayed until after harvest.

The new prices, together with those for previous years, are shown in the following table:

Grain Prices - 1952-53 Crop
(Pesos Per 100 Kilos on Rail in Sacks at Ports)

Grain	1952-53	1951-52	1950-51	1949-50	1948-49	1947-48
Wheat	50.00	34.00 1/	30.50	23.50	23.00	20.00
Flax	65.00	50.00	41.00	34.00	30.00	30.00
Rye	42.00	28.00	23.50	16.50	17.50	17.50
Oats	38.00	25.50	21.00	14.00	16.00	16.00
Barley	43.00	29.50	23.50	17.00	15.00	13.50

1/ Basic price and does not include the bonus of 3.00 pesos or 5.00 pesos per 100 kilos established for specified drought stricken areas of the provinces of Córdoba, Santa Fé, Entre Rios and Buenos Aires, according to intensity of drought.

The new prices are designed to encourage production and sowings will be increased, particularly for wheat, provided the inflationary spiral does not continue throughout the four-month period prior to the time when planting commences, thus offsetting these benefits. It will be noted that these prices, probably unintentionally, show a relative and definite advantage in favour of wheat over flax as the traditional price relationship has been three to two. In the main cereal belt wheat competes with flax, and given favourable climatic conditions, farmers will prefer to sow wheat.

Grain Shipments Grain shipments during February totalled 177,755 metric tons, exports of wheat having been brought almost to a standstill with only 20,031 tons (0.7 million bushels) moving to Peru and Paraguay. In February last year shipments of wheat alone totalled 244,198 tons (9.0 million bushels).

The following table, compiled from trade sources, shows grain shipments in the first quarter of the 1951-52 crop year, with comparative data for the previous year:

Argentine Grain Shipments
December 1, 1951 - February 29, 1952

Crop Year	Wheat	Corn	Flax	Oats	Rye	Barley
- thousand bushels -						
1951-52	3,529	8,685	1,352	3,350	2,808	4,084
1950-51	22,425	295	2,914	1,614	239	463

Exports of corn show an improvement for this period reflecting a better supply position than a year ago when the crop was virtually lost on account of drought. The crop year for corn commences April 1.

The following table gives exports of grain from Argentina by destination during the first two months of 1952:

Argentine Grain Shipments, January-February, 1952

Destination	Wheat	Corn	Flax	Oats	Rye	Barley
- thousand bushels -						
Austria	-	217	-	-	-	-
Belgium	-	1,409	71	-	146	-
Brazil	1,049	-	-	6	-	-
Denmark	-	-	-	-	-	607
Finland	-	-	-	-	201	-
France	-	899	614	-	-	-
Germany	-	256	25	304	405	1,988
Holland	-	193	19	534	245	191
Norway	-	79	-	-	68	-
Paraguay	379	-	-	-	-	-
Peru	580	-	-	-	-	-
Sweden	-	3,352	81	440	998	620
Switzerland	-	163	-	595	70	78
United Kingdom	-	407	7	-	-	-
Totals	2,008	6,973	817	1,879	2,133	3,484

AUSTRALIAN SITUATION

Supply Position Estimates of the recently harvested wheat crop in Australia remain unchanged at 161.4 million bushels, about 12 per cent below the 1950-51 crop of 184.2 million. Total estimated supplies for the current crop year, comprised of the new crop and a carryover of 19.5 million bushels, are 180.9 million bushels, a decrease of about 21 per cent from the 1950-51 level of 228.1 million. Assuming domestic requirements of 80 million bushels, the amount available in 1951-52 for export and carryover is approximately 100 million bushels as against 146 million in 1951.

Australian Wheat Supplies

Item	1951-52 1/	1950-51 2/
- million bushels -		
Carryover at November 30 (including flour as wheat)	19.5	43.9
New crop	161.4	184.2
Total estimated supplies	180.9	228.1
Less estimated domestic requirements for crop year	80.0	82.0
Available for export and carryover	100.9	146.1
Deduct:		
Exports of wheat as grain, December 1-March 1	9.4	21.1
Exports of wheat flour in terms of wheat		
December 1-March 1	7.6	9.2
Total exports of wheat and wheat flour	17.0	30.3
Balance on March 2 for export and carryover	83.9	115.8

1/ Preliminary. 2/ Subject to revision.

Reflecting the reduction in exportable supplies, exports of both wheat and wheat flour for the first three months of the current crop year are below those of the December-February period of 1950-51. The drop in exports has been sharper for wheat as grain, with only 9.4 million bushels exported during the first quarter of 1951-52 as against 21.1 million for the comparable period last year. Exports of wheat flour in terms of wheat equivalent were down from 9.2 million to 7.6 million bushels. The balance remaining on March 2, 1952 for export and carry-over was estimated at 83.9 million bushels as against 115.8 million a year ago.

Australian Cable The following cable, dated March 17, 1952, has been received from the Agricultural Secretary for Canada in Melbourne:

"Australian wheat stocks at February 23rd totalled 130,161,000 bushels. Wheat exports from December 1st, 1951 to March 1st totalled 9,378,000 bushels, with shipments during the preceding four weeks mainly to India and New Zealand. Flour exports for the same period were 147,147 long tons, with 9,543 going to Indonesia, 7,934 to Malaya, 5,243 to the United Kingdom and 4,629 to India. Official estimate of 1951-52 wheat yield is 161,400,000 bushels from 10,434,000 acres."

Bulk Handling of Wheat The following account of bulk handling systems in Australia has been taken from an article on "The Wheat Industry in New South Wales" by R. W. Blake, Agricultural Secretary for Canada, Melbourne. The complete article appeared in "Overseas Report on Agricultural Developments" No. 4, March 1952, published by the Economics Division, Marketing Service, Department of Agriculture, in co-operation with the Trade Commissioner Service, Foreign Trade Service, Department of Trade and Commerce.

Bulk handling systems for wheat operate in the three States of New South Wales, Victoria and Western Australia. In New South Wales and Victoria they are operated by State Government utilities, whilst in Western Australia bulk handling is operated by Co-operative Bulk Handling Limited, under a Special State Act of Parliament.

New South Wales was the first State to pioneer bulk handling of wheat which began in 1920. The grain elevator system consists of a concrete and steel shipping elevator at Sydney with a storage capacity of 7.5 million bushels, a terminal elevator at Newcastle with a capacity of 800,000 bushels, 180 country station elevators with capacities varying between 30,000 and 350,000 bushels, giving a total capacity of 25,028,000 bushels, and two sub-terminal elevators of 3 million bushels each. The total capacity of terminal and country elevators is 39,328,000 bushels. In addition, there are 33 country bulk-heads of 100,000 bushels capacity each. Two more sub-terminal elevators of 3 million bushels capacity each are in the course of construction. All have direct access to rail with port facilities at Sydney and Newcastle.

The country elevators are built of reinforced concrete and steel with corrugated galvanised iron coverings, and are circular type silos. The bulk-heads are temporary storage sheds with wooden frame sides sloping inwards from the top with roofing of galvanised corrugated iron, supported by standing poles. These bulk-heads can be put up in sections and are easily moved to places where needed, thus giving flexibility to the system. Eventually they will be replaced by permanent silos.

The changeover to bulk handling of wheat has been given an impetus this year by the shortage of wheat sacks due to the difficulty in getting supplies of jute.

Bulk handling of wheat in Australia is not yet the same as in Canada. Generally, wheat is taken from the farm to the elevator in sacks fastened by clips or roughly sewn, the sacks being emptied into a hopper and the wheat taken into the elevator by means of an endless belt or grain augur according to the size and type of the elevator. In the 1951-52 season, only about 3 per cent of the farmers handled their wheat straight from the field, or farm granary, to the elevator without using sacks. These farmers were fairly large operators able to instal the necessary equipment. Their methods are being studied by other grain farmers and it may be that in a few years time the transition to complete bulk handling of wheat will be achieved.

CALENDAR OF WHEAT EVENTS, MARCH, 1952

- 7 - Speaking in the House of Commons in connection with the handling of out-of-condition grain, the Right Hon. C. D. Howe urged farmers with unthreshed grain on their farms to delay threshing, if at all possible, until the grain is dry and thus avoid aggravating the already serious handling problems.
- 12 - A sharp increase in the number of farm grain driers operating in the Prairie Provinces was reported by the Chief of the Grain Research Laboratory, Board of Grain Commissioners for Canada. In addition to 100 driers already located, another 20 were believed to be operating or preparing to operate. It is thought that most of the machines have been purchased outright in the United States by Western Canadian farmers.
- 14 - According to records of the Board of Grain Commissioners, some 21 million bushels of damp and tough grain, including 13.1 million bushels of wheat, were conditioned by the "natural drying" process during the first half of the current crop year. The natural drying process involves the mixing of dry grain with high moisture content grain of the same grade.
- 17 - The Office of Foreign Agricultural Relations, United States Department of Agriculture, estimated the 1951 world wheat crop at 6,500 million bushels, 50 million bushels less than the previous estimate. The current wheat estimate is 180 million bushels larger than in 1950 and about 475 million bushels above the pre-war average (1935-39).
- 19 - Based on farmers' reported intentions as of March 1, the 1952 seedings of spring wheat in the United States are expected to total 21,998,000 acres, 1 per cent less than in 1951 but 17 per cent more than the 10-year average. A total of 78,225,000 acres of all wheat is indicated by combining the prospective acreage of all spring wheat with the seeded acreage of winter wheat as estimated last December. The combined seeded acreage in 1951 was 78,059,000 acres.

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