

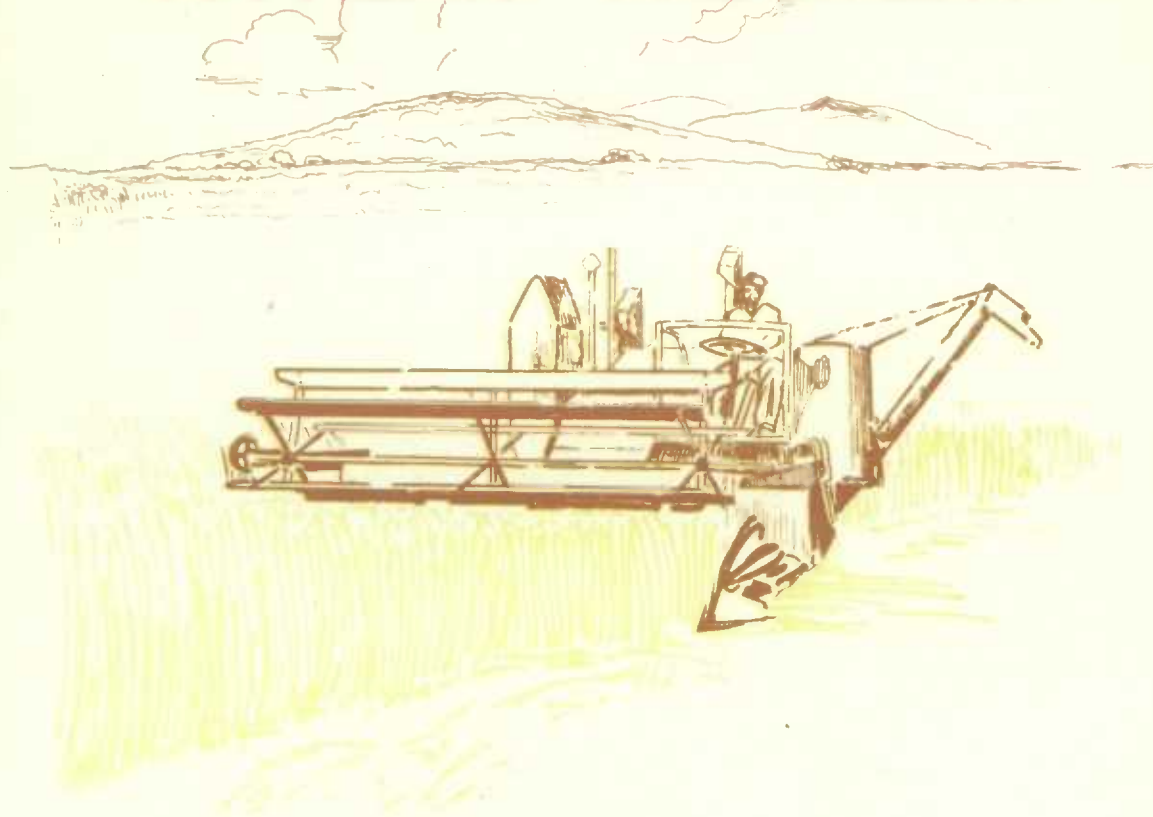
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DOMINION BUREAU OF STATISTICS
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THE WHEAT REVIEW



AUGUST, 1952

DOMINION BUREAU OF STATISTICS
Department of Trade and Commerce

THE WHEAT REVIEW

AUGUST, 1952

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WORLD WHEAT SITUATION

Current Supplies Latest available estimates indicate that supplies of wheat remaining on or about August 1, 1952 in the four major exporting countries for export and carryover at the end of their respective crop years amounted to 1,093.5 million bushels, some 15 per cent greater than the 947 million available a year ago. Supplies this year (in millions of bushels) were held as follows, with last year's figures in brackets: United States, 834.3 (670.2); Canada, 213.0 (189.2); Australia, 42.7 (55.7); and Argentina, 3.5 (31.9). Estimates for both years include on-farm stocks as well as those in commercial positions. It should be noted that the United States new crop is now included in these supply calculations. The supply figures shown for Canada represent the crop-year-end carryover only, the new crop not being taken into account until next month.

Large World Crop of Breadgrains in Prospect 1/ The outlook for the 1952-53 world breadgrains crop is for a somewhat larger outturn than was obtained from the good 1951-52 harvest. Based on preliminary reports of a very good harvest in Northern Hemisphere countries and assuming near-average crops in important producing Southern Hemisphere countries, world bread-grain production in 1952 may even establish a new record.

An increase of about 400 million bushels is reported for North America. This, together with a probable net increase in harvests of exporting countries in the Southern Hemisphere, where Argentina's crop last year was a virtual failure, would mean a substantial increase in supplies available for export or carryover. Somewhat better wheat harvests in Turkey, France, and French North Africa point to some surpluses from those countries also.

At the same time prospects for better harvests than in 1951 for Western European and Near East countries point to reduced import needs in those areas. Reports for France, Italy and Western Germany indicate an increase of about 50 million bushels compared with the 1951 harvest in those countries. Reports from Turkey, Iran, and Syria show increases, which more than offset reductions reported for India and Pakistan. The reduction in the latter countries, together with the current scarcity of rice, makes continued need for substantial wheat imports into that area apparent.

The present outlook is for a record wheat crop in North America, with substantial increases in both of the principal producing countries. The United States crop is estimated at 1.3 billion bushels, as of August 1. This is about 50 million bushels above the July 1 estimate and is one of the largest crops of record...

Wheat production in Canada is officially forecast at the all-time-record figure of 656 million bushels. This compares with the previous record of 567 million in 1928 and with last year's near record production of 553 million. Rye production in North America is small and is expected to approximate the 1951 level. Distribution within the area varies, however, with a decline in the United States crop offset by a larger outturn for Canada.

1/ The summary on world breadgrain prospects is abstracted from the August 25 issue of 'Foreign Crops and Markets' published by the United States Department of Agriculture.

The breadgrain outlook for Europe is generally favourable, and an increase over the 1951 harvest is expected in countries for which reports are available. France, Italy, Western Germany and Sweden are the principal countries reporting increases. The outlook is also promising in Spain, and present official estimates indicate that the wheat crop there may be at the same high level as in 1951 and rye production will be larger than in 1951. Reports from eastern and central Europe are limited, but some evidence of damage from drought is seen in Danube Basin countries, especially in Yugoslavia. Damage to winter grains is, however, much less than that to late crops. The extent of crop damage earlier believed possible as a result of cold weather in late May and early June is still uncertain.

Conditions in the Soviet Union have not been entirely favourable, and some damage to winter grains appears to have taken place. The season is late, with delayed seeding and retarded growth indicated for many regions. There have been reports of considerable lodging of grain which would complicate harvest operations. Difficulties of combine harvesting were reported from a number of regions. A favourable factor, however, was good harvesting weather in the latter part of July and early August. Conditions in Asia appear mostly favourable, and the present outlook is for an even better harvest than the large one of last year. Increases are expected in all reporting Near East countries, with the most favourable conditions reported for Turkey. A record harvest is forecast there, following the new record achieved by the 1951 wheat crop. Stocks remaining from that record crop are relatively large and, together with the surplus from the current harvest, will give that country substantial quantities of grain available for export. In the Far East some decrease is reported for the outturn in India and Pakistan, and continued dependence on imports there is seen. Press accounts indicate an increase for China.

A good harvest is reported for Africa, and the present outlook is for an increase of about 15 per cent over the 1951 crop in the Northern Hemisphere countries. It is too early for much indication of the probable production in the Union of South Africa where harvest does not begin until November. Best results for reporting countries are for Algeria where the increase is about 35 per cent over last year's near-average crop and for Tunisia with a gain of 85 per cent, over the poor crop of a year ago.

Early season indications for South America are favourable. In Argentina, the principal wheat producer, virtually all factors affecting growth are very satisfactory at this, the beginning of the growing season. Soil moisture is sufficient to assure good growth even if spring rains should be light. Cold weather has retarded growth and strengthened the root system. These factors, added to an **acreage** increase estimated to be about 25 per cent compared with last year, make the outlook good in contrast with the virtual failure of last season.

Prospects for the wheat crop in Australia are less favourable than in 1951-52. Acreage for the country as a whole is down about 7 per cent. Some increase was expected earlier in the season, but excessive rain in New South Wales, Victoria, and South Australia and too little rain in Western Australia during seeding time prevented growers seeding the full acreage intended. Reductions are reported for all States except Queensland, and the total acreage of seeded wheat for grain is the smallest since 1944-45. According to a preliminary estimate by the Australian Wheat Board the crop harvested in November/December may be about 10 million bushels below the revised figure of 161 million bushels for 1951-52.

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

Importing Countries	Guaranteed Quantities	S O U R C E				Total Purchases	Remainder
		Canada 1/	Australia 2/	France 2/	U.S.A. 2/		
- thousand bushels -							
Austria	11,023	260	-	496	10,192	10,948	75
Belgium	20,209	11,336	-	-	8,753	20,089	120
Bolivia 3/	2,756	2,050	-	-	782	2,832	-
Brazil 3/	13,228	2,461	-	-	10,671	13,132	-
Ceylon 3/.....	6,614	-	5,166	-	1,404	6,570	-
Costa Rica 3/	1,213	709	-	-	405	1,114	-
Cuba 3/	7,422	3,413	-	-	4,012	7,425	-
Denmark 3/	1,617	538	-	-	1,100	1,638	-
Dominican Republic 3/	876	496	-	-	376	872	-
Ecuador 3/	1,286	173	-	-	1,151	1,324	-
Egypt 3/	14,697	5,862	477	-	8,505	14,844	-
El Salvador	404	66	-	-	327	393	11
Germany	66,139	11,027	2,904	3,590	48,198	65,719	420
Greece	15,726	1,423	-	-	14,194	15,617	109
Guatemala 3/.....	919	239	-	-	684	923	-
Haiti 3/.....	1,029	419	-	-	684	1,103	-
Honduras Republic 3/.	367	170	-	-	197	367	-
Iceland	404	114	-	-	264	378	26
India	55,116	16,651	10,014	-	28,376	55,041	75
Indonesia 3/	3,674	29	1,946	-	1,825	3,800	-
Ireland 3/	10,104	7,037	1,950	-	1,145	10,132	-
Israel 3/	5,879	1,536	-	-	4,351	5,887	-
Italy	40,418	13,783	3,879	-	18,420	36,082	4,336
Japan	18,372	3,728	-	-	13,601	17,329	1,043
Lebanon 3/	2,388	8	-	-	2,457	2,465	-
Liberia 3/	37	25	-	-	11	36	-
Mexico 3/	12,860	-	-	-	12,860	12,860	-
Netherlands 3/	24,802	6,804	2,856	-	15,278	24,938	-
New Zealand 3/	4,593	-	4,593	-	-	4,593	-
Nicaragua 3/.....	331	195	-	-	136	331	-
Norway 3/	7,716	2,995	-	-	4,729	7,724	-
Panama 3/	625	303	-	-	321	624	-
Peru 3/	5,512	3,172	-	-	2,477	5,649	-
Philippines 3/	7,202	3,895	3	-	3,302	7,200	-
Portugal 3/	5,626	955	144	-	4,508	5,607	-
Saudi Arabia 3/	1,837	-	52	-	1,774	1,826	-
Spain	4,373	1,102	-	-	1,102	2,204	2,169
Sweden 3/	2,756	-	1,493	-	1,315	2,808	-
Switzerland 3/	6,430	4,323	-	-	2,107	6,430	-
Union of South Africa	11,023	5,689	-	-	4,511	10,200	823
United Kingdom 3/ ...	177,068	124,621	35,774	-	16,671	177,066	-
Venezuela	6,246	4,006	-	-	1,895	5,901	345
Totals	580,917	241,613	71,251	4,086	255,071	572,021	
Guaranteed Quantities (Exporting Countries)		238,490	72,000	4,089	255,149	569,728	
Balance		(3,123)	749	3	78	(2,293)	

1/ Canadian Sales through August 19th, 1952.

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

3/ Quota filled.

International Wheat Agreement Sales and Purchases for Crop Year 1952-53

Importing Countries	Guaranteed Quantities 1/	S O U R C E				Total Purchases	Remainder 4/
		Canada 2/	Australia 3/	France 3/	U.S.A. 3/		
- thousand bushels -							
Austria	11,023	-	-	-	355	355	10,668
Belgium	20,209	6,916	-	-	294	7,210	12,999
Bolivia 5/	2,756	2,297	-	-	321	2,618	-
Brazil	13,228	-	-	-	-	-	13,228
Ceylon	6,614	-	4,641	-	503	5,144	1,470
Costa Rica	1,213	167	-	-	158	325	888
Cuba 6/	7,422	-	-	-	-	-	7,422
Denmark	1,617	747	-	-	325	1,072	545
Dominican Republic ..	876	132	-	-	48	180	696
Ecuador 7/	1,286	-	-	-	-	-	1,286
Egypt	14,697	7,696	-	-	6,297	13,993	704
El Salvador	404	15	-	-	17	32	372
Germany	66,139	2,483	-	-	6,754	9,237	56,902
Greece	15,726	-	-	-	-	-	15,726
Guatemala	919	6	-	-	-	6	913
Haiti 7/	1,029	-	-	-	-	-	1,029
Honduras Republic ...	367	-	-	-	31	31	336
Iceland	404	-	-	-	-	-	404
India	55,116	-	1,867	-	1,064	2,931	52,185
Indonesia 8/	3,674	-	1,276	-	2,138	3,414	-
Ireland	10,104	5,600	1,195	-	-	6,795	3,309
Israel	5,879	1,754	-	-	444	2,198	3,681
Italy	40,418	-	-	-	-	-	40,418
Japan	18,372	-	-	-	-	-	18,372
Lebanon	2,388	-	-	-	-	-	2,388
Liberia	37	18	-	-	-	18	19
Mexico	12,860	-	-	-	208	208	12,652
Netherlands	24,802	274	-	-	3,573	3,847	20,955
New Zealand	4,593	-	3,020	-	-	3,020	1,573
Nicaragua 7/	331	-	-	-	-	-	331
Norway	7,716	1,867	-	-	1,816	3,683	4,033
Panama 7/	625	-	-	-	-	-	625
Peru	5,512	709	-	-	1,331	2,040	3,472
Philippines	7,202	1,044	-	-	723	1,767	5,435
Portugal	5,626	212	6	-	370	588	5,038
Saudi Arabia	1,837	-	-	-	-	-	1,837
Spain	4,373	-	-	-	-	-	4,373
Sweden	2,756	-	-	-	-	-	2,756
Switzerland	6,430	3,674	-	-	1,736	5,410	1,020
Union of South Africa	11,023	5,600	-	-	2,053	7,653	3,370
United Kingdom	177,068	4,448	12,142	-	1,131	17,721	159,347
Venezuela	6,246	1,120	-	-	265	1,385	4,861
Totals	580,917	46,779	24,147	-	31,955	102,881	
Guaranteed Quantities (Exporting Countries)		235,000	88,700	4,089	253,128	580,917	
Balance		188,221	64,553	4,089	221,173	478,036	

1/ Purchases must not exceed 95 per cent of the guaranteed quantity until further notice.

2/ Canadian sales through August 19th, 1952.

3/ Sales recorded by International Wheat Council through August 15th, 1952.

4/ These quantities are the remainders of the guaranteed quantities for the year. They are not an indication of quantities which may be purchased (See note 1/)

5/ 95 per cent of quota filled.

6/ Sales may be made commencing August 26th, 1952.

7/ Sales may not be made until further advised.

8/ Quota filled.

CANADIAN SITUATION

Potential Wheat Supplies 1952-53

If current estimates of production are realized, Canadian wheat supplies for 1952-53 will amount to 869 million bushels, 127 million greater than in 1951-52. Current crop-year supplies are made up of the July 31, 1952 carryover of 213 million bushels and the new crop estimated at a record 656 million bushels on the basis of conditions at July 31. Supplies of the size indicated would be the third largest on record, being exceeded only by those of 1942-43 and 1943-44 when the totals reached 980.4 million and 879.5 million bushels, respectively. This year's indicated supplies are about 35 per cent above the ten-year (1941-42-1950-51) average of 643.3 million bushels, despite the fact that supplies in the first four years of that period were abnormally high.

While harvesting of this year's wheat crop has progressed under generally favourable conditions, considerable variation in development of the crop means that much of it is still susceptible to frost damage and other weather hazards. This factor, which may necessitate revision of the current forecast, should be considered when comparing the 1952-53 supply position with that of previous years as set out in the accompanying table.

Supply and Disposition of Canadian Wheat, 1941-42 to 1951-52
and Estimated Supply 1952-53

Crop Year	Supply			Disposition		
	Carryover at beginn- ing of crop year	Produc- tion	Total Supply 1/	Exports 2/	Domestic Disappear- ance 3/	Carry- over at end of crop year
- million bushels -						
1941-42 ...	480.1	314.8	795.0	225.8	145.4	423.8
1942-43 ...	423.8	556.7	980.4	214.7	171.1	594.6
1943-44 ...	594.6	284.5	879.5	343.8	179.2	356.5
1944-45 ...	356.5	416.6	773.6	342.9	172.6	258.1
1945-46 ...	258.1	318.5	576.7	343.2	159.9	73.6
1946-47 ...	73.6	413.7	487.3	239.4	161.8	86.1
1947-48 ...	86.1	341.8	428.7	195.0	156.0	77.7
1948-49 ...	77.7	386.3	464.3	232.3	129.6	102.4
1949-50 ...	102.4	371.4	473.8	225.1	136.5	112.2
1950-51 ...	112.2	461.7	573.9	241.0	143.7	189.2
10 yr. av..	256.5	386.6	643.3	260.3	155.6	227.4
1951-52 4/	189.2	552.7 5/	741.9	356.1	172.8 5/	213.0
1952-53 4/	213.0	656.1 6/	869.0			

1/ Includes imports of wheat and flour in terms of wheat.

2/ Includes exports of flour in terms of wheat.

3/ Includes human food, animal feed, seed, industrial use and waste.

4/ Preliminary.

5/ Subject to revision on basis of final disposition data.

6/ Based on August estimate of production.

Exports of Wheat and
Wheat Flour, 1951-52

Preliminary data indicate that Canada's 1951-52 exports of wheat and wheat flour in terms of wheat amounted to 356.1 million bushels, second only to the record 407.6 million exported in 1928-29. Exports of wheat as grain, at 304.7 million bushels, were 65 per cent above the 1950-51 level of 185.0 million and were exceeded only once before in the country's history when 354.4 million bushels were exported in 1928-29.

The 1951-52 totals for exports of wheat as grain are compiled from overseas clearances and exports to the United States as recorded by the Statistics Branch of the Board of Grain Commissioners for Canada, while data on exports of wheat flour are obtained from Canadian customs returns, adjusted for the August-April period to remove the effect of time lag in reporting. Completely adjusted data on wheat flour exports for the 1951-52 crop year will be published in the November issue of this publication. In contrast to near-record exports of wheat as grain, exports of wheat flour have been exceeded in seven out of the previous ten crop years and also in 1923-24 and 1928-29. Preliminary data on 1951-52 exports of wheat flour in terms of wheat indicate a total of 51.3 million bushels, 8 per cent below the 1950-51 level of 55.9 million.

Monthly exports of wheat and wheat flour in terms of wheat during 1951-52 ranged from a low of 19.4 million bushels in January to a high of 44.3 million in June. Movement during the May-July quarter of the crop year was particularly heavy, with exports during each of the three months exceeding the 40-million bushel level. Overseas clearances of wheat, the major part of total exports of wheat and flour, ranged from a low of 12.1 million bushels in December to 35.6 million in May.

The United Kingdom continued as Canada's chief market for wheat and flour exports, taking approximately 36 per cent of the 1951-52 combined total. Exports of Canadian wheat as grain to the United Kingdom in the twelve months ending July 31, 1952 amounted to 108.8 million bushels, representing 36 per cent of total wheat exports, while exports of flour in terms of wheat equivalent totalled 18.8 million bushels. Comparable figures for 1950-51 were 78.1 million and 23.4 million bushels, respectively.

In addition to the United Kingdom, seven other countries purchased wheat as grain in amounts exceeding 10 million bushels. These countries, with their purchases in millions of bushels, were: the United States, 38.7 (of which 7.3 million were for milling in bond); India, 18.1; Japan, 16.5; Germany, 15.8; Belgium, 15.5; the Netherlands, 11.9; and Italy, 11.0. Altogether, 40 countries and crown colonies purchased Canadian wheat as grain during the crop year.

Exports of Canadian wheat flour during 1951-52 were much more widely distributed than exports of wheat, with the former going to 73 countries, territories and crown colonies. In addition to the United Kingdom, flour exports equivalent to at least one million bushels of wheat went to the following destinations (in order of size of export shipments): Philippine Islands, Venezuela, Italy, Trinidad and Tobago, Cuba, Jamaica, Egypt, Hong Kong and Lebanon.

Details of quantities and destinations of wheat and flour in terms of wheat sold by Canada under the terms of the International Wheat Agreement for 1951-52 may be found on page 3 of this issue. It should be noted, however, that due to differences in timing between sales and actual shipment, export data for individual countries will not necessarily agree with sales data even where all exports have been made under terms of the agreement.

First Estimate of
Production of Canada's
1952 Grain Crops

Based on conditions at July 31, Canadian farmers are expected to harvest all-time record crops of wheat and barley in 1952. The oat crop prospects are for the second highest yield per acre on record but acreages of

this crop are at a relatively low level and the anticipated total production has been exceeded in six previous years. The expected yield of rye is also well above average and, if realized, the estimated production of this crop will be the third highest on record. With the exception of mixed grains, average yields per acre for all Canada of all grain crops covered in the first estimate of production, released by the Dominion Bureau of Statistics on August 15, were above last year's levels and were all significantly above the long-time (1908-50) average. In general, extremely high grain yields are in prospect throughout western Canada while in the east the situation is rather less favourable. Unseasonable weather has hampered crop development at various stages of the season in parts of central Canada and the Maritimes and production of most spring grains in these regions will be below last year's levels.

August Estimate of the 1952 Production of Principal Grain Crops,
Canada and Prairie Provinces, Compared with 1951

Crop	Area		Yield Per Acre		Production	
	1951 1/	1952	1951	1952	1951 2/	1952
	acres	acres	bu.	bu.	bu.	bu.
<u>CANADA</u>						
Winter wheat	703,000	649,000	28.0	32.0	19,696,000	20,768,000
Spring wheat	24,551,400	25,345,000	21.7	25.1	532,961,000	635,299,000
All wheat	25,254,400	25,994,000	21.9	25.2	552,657,000	656,067,000
Oats	11,896,600	11,062,400	41.0	42.1	488,191,000	465,668,000
Barley	7,839,800	8,475,300	31.3	34.8	245,218,000	295,333,000
Fall rye	711,600	757,700	15.8	20.0	11,277,000	15,131,000
Spring rye	415,000	499,600	15.3	19.6	6,370,000	9,780,000
All rye	1,126,600	1,257,300	15.7	19.8	17,647,000	24,911,000
Flaxseed	1,158,500	1,206,500	8.5	10.8	9,897,000	12,996,000
Mixed grains	1,524,300	1,565,300	44.9	38.6	68,509,000	60,392,000
<u>PRAIRIE PROVINCES</u>						
Wheat	24,385,000	25,204,000	21.7	25.1	529,000,000	632,000,000
Oats	8,312,000	7,560,000	40.9	46.3	340,000,000	350,000,000
Barley	7,530,000	8,145,000	31.1	35.0	234,000,000	285,000,000
Rye	1,046,800	1,176,700	15.3	19.8	15,980,000	23,350,000
Flaxseed	1,086,000	1,124,000	8.2	10.7	8,870,000	12,000,000

1/ Acreages rounded from 1951 Census of Agriculture. 2/ Revised basis 1951 census data. Further revisions may be required when final disposition data become available.

Reflecting nearly ideal growing conditions in western Canada this season, Canada's 1952 wheat crop is currently estimated at the unprecedented total of 656 million bushels compared with last year's (revised) estimate of 553 million and the previous record of 567 million harvested in 1928. A wheat crop of the size indicated this year would be about 70 per cent above the unrevised ten-year (1941-50) average of 387 million bushels. It should be noted that, while excellent progress has been made with harvesting in most southern areas of the Prairie Provinces, late-seeded wheat is still susceptible to frost damage and other weather hazards. An extended period of warm, dry weather will still be required to fully complete the harvest and to assure ample supplies of high quality grain. The total acreage seeded to wheat this year is placed at 26 million acres, about 9 per cent below the record 28.7

million seeded in 1940. However, the estimated average yield of 25.2 bushels is well above both last year's yield of 21.9 and the long-time (1908-50) average of 16.2 bushels per acre.

In the Prairie Provinces the wheat crop is expected to yield 632 million bushels as against 529 million last year and the previous record of 545 million in 1928. The anticipated yield per acre of wheat in the Prairie Provinces is 25.1 bushels, with Manitoba averaging 23.2, Saskatchewan 24.2 and Alberta 28.1 bushels per acre. Production in Saskatchewan is placed at 397 million bushels while that in Alberta and Manitoba is estimated at 180 million and 55 million bushels, respectively. Small quantities of winter wheat are included with spring wheat in the estimates for the Prairie Provinces.

Wheat production in the remainder of Canada is estimated at about 24 million bushels. Ontario's anticipated outturn of 21.5 million bushels accounts for the greater part of Canadian wheat grown outside the Prairie Provinces. Some 20.3 million bushels of the 1952 Ontario crop is winter wheat which is expected to yield an average of 32 bushels per acre.

August Estimate of the 1952 Production of Wheat, Canada and Provinces,
Compared with 1951

Province	Area		Yield Per Acre		Production	
	1951 1/ acres	1952 acres	1951 bu.	1952 bu.	1951 2/ bu.	1951 bu.
All wheat -						
Canada	25,254,400	25,994,000	21.9	25.2	552,657,000	656,067,000
Ontario	746,900	685,700	27.6	31.4	20,648,000	21,502,000
Spring wheat -						
Canada	24,551,400	25,345,000	21.7	25.1	532,961,000	635,299,000
Prince Ed. Is..	4,700	3,700	24.0	22.0	113,000	81,000
Nova Scotia ...	1,200	900	22.0	25.0	26,000	22,000
New Brunswick .	3,400	2,800	23.0	22.0	78,000	62,000
Quebec	12,200	11,100	21.9	18.0	267,000	200,000
Ontario	43,900	36,700	21.7	20.0	952,000	734,000
Manitoba	2,326,000	2,368,000	22.4	23.2	52,000,000	55,000,000
Saskatchewan ..	15,635,000	16,432,000	20.8	24.2	325,000,000	397,000,000
Alberta	6,424,000	6,404,000	23.7	28.1	152,000,000	180,000,000
Br. Columbia ..	101,000	85,800	25.0	25.6	2,525,000	2,200,000
Winter wheat -						
Canada 3/.....	703,000	649,000	28.0	32.0	19,696,000	20,768,000

1/ Acreages rounded from 1951 Census of Agriculture.

2/ Revised basis 1951 census data. Further revisions may be required when final disposition data become available.

3/ Winter wheat estimates apply to Ontario only. The western wheat crop contains a relatively small proportion of winter wheat but, due to difficulties encountered in obtaining acreage data required for a separate winter wheat estimate in the Prairie Provinces, all western wheat is currently included under spring wheat.

Wheat Production in
Canada and the Prairie
Provinces, 1910—1952

The first estimate of the 1952 wheat crop in Canada, based on conditions at July 31, placed the probable outturn at 656.1 million bushels of which the Prairie Provinces account for 632 million bushels. If a crop of this size is realized, it would mark a new record for both Canada and the Prairies. The previous record outturn was in 1928 when the all-Canada crop totalled 566.7 million bushels of which 544.6 million were harvested in the Prairie Provinces.

Wheat Production in Canada and the Prairie Provinces, 1910—1952

Year	Canada	Manitoba	Saskatchewan	Alberta	Three Prairie Provinces
- thousand bushels -					
1910	132,078	34,127	66,979	9,060	110,167
1911	231,237	62,820	109,323	36,554	208,697
1912	224,159	63,017	106,960	34,303	204,280
1913	231,717	53,331	121,559	34,372	209,262
1914	161,280	38,605	73,494	28,859	140,958
1915	393,543	69,337	224,312	66,538	360,187
1916	262,781	29,667	147,559	65,088	242,314
1917	233,743	41,040	117,921	52,992	211,953
1918	189,075	48,191	92,493	23,752	164,436
1919	193,260	40,975	89,994	34,575	165,544
1920	263,189	37,542	113,135	83,461	234,138
1921	300,858	39,054	188,000	53,044	280,098
1922	399,786	60,051	250,167	64,976	375,194
1923	474,199	35,804	271,622	144,834	452,260
1924	262,097	41,464	132,918	61,312	235,694
1925	395,475	33,624	235,472	97,962	367,058
1926	407,136	47,133	219,646	113,986	380,765
1927	479,665	30,773	252,500	171,286	454,559
1928	566,726	52,383	321,215	171,000	544,598
1929	302,192	28,565	160,565	90,206	279,336
1930	420,672	43,600	206,700	147,000	397,300
1931	321,325	28,112	132,466	140,603	301,181
1932	443,061	44,041	211,551	167,355	422,947
1933	281,892	32,666	128,004	102,334	263,004
1934	275,849	37,100	114,200	112,500	263,800
1935	281,935	23,250	142,198	98,648	264,096
1936	219,218	26,000	110,000	66,000	202,000
1937	180,210	45,100	36,000	75,700	156,800
1938	360,010	50,000	137,800	148,200	336,000
1939	520,623	61,300	271,300	161,400	494,000
1940	540,190	66,400	266,700	180,700	513,800
1941	314,825	51,000	147,000	98,000	296,000
1942	556,684	53,000	305,000	171,000	529,000
1943	284,460	39,000	146,000	82,800	267,800
1944	416,635	50,300	242,100	99,300	391,700
1945	318,512	38,800	168,100	87,700	294,600
1946	413,725	58,000	208,000	127,000	393,000
1947	341,758	42,000	173,000	105,000	320,000
1948	386,345	50,000	191,000	115,000	356,000
1949	371,406	52,000	186,000	103,000	341,000
1950	461,664	50,000	260,000	117,000	427,000
1951 1/	552,657	52,000	325,000	152,000	529,000
1952 2/	656,067	55,000	397,000	180,000	632,000

1/ Revised.

2/ First estimate of production August 15, 1952.

Carryover Stocks
of Canadian Grain
at July 31, 1952

Total carryover stocks of the five major Canadian grains in all North American positions as at July 31, 1952 were estimated at almost 405 million bushels, compared with last year's level of 342.4 million and the 1941-1950 average of 368.3 million. Stocks of Canadian wheat at the end of the 1951-52 crop year were placed at 213.0 million bushels, an increase of 23.8 million over the July 31, 1951 revised total of 189.2 million. Current carryover stocks of oats, the largest since 1944, were estimated at 104.9 million bushels while barley stocks were placed at a record 76.9 million. Rye and flaxseed stocks, at 7.7 million and 2.4 million bushels, respectively, were also well above the corresponding totals of 3.3 million and 1.2 million at July 31, 1951.

Position of Canadian Grain Stocks, July 31, 1952 1/

Position	Wheat	Oats	Barley	Rye	Flaxseed
- thousand bushels -					
<u>In Canada</u>					
On farms	19,262	57,836	21,476	1,346	409
Country elevators	94,947	21,943	24,355	1,839	497
Interior private and mill elevators .	4,652	680	1,916	15	22
Interior terminal elevators	5,454	26	96	2/	1
Pacific Coast terminal elevators	6,614	770	1,934	1	-
Churchill elevator	2,251	2/	-	-	-
Fort William-Port Arthur elevators ..	13,700	7,134	8,442	2,923	861
In transit - lake	4,520	2,266	2,618	-	48
In transit - rail	19,812	7,241	6,033	347	138
Eastern elevators	37,594	3,121	9,655	627	459
Eastern mills	1,638	319	159	1	-
Western mills	287	65	38	2/	-
Totals in Canada	210,731	101,400	76,721	7,099	2,435
Totals in United States	2,244	3,497	217	577	-
Totals in Canada and United States	212,975	104,896	76,938	7,677	2,435
<u>Comparative Stocks, July 31, 1951 3/</u>					
In Canada	187,190	94,527	53,496	2,625	1,204
In United States	2,013	651	-	674	-
Totals in Canada and United States	189,203	95,177	53,496	3,299	1,204
1941-1950 average	256,517	72,652	30,610	5,193	3,295

1/ Subject to revision. 2/ Less than 500 bushels. 3/ Revised.

Farm-held stocks of Canadian grain at July 31, 1952 did not differ greatly from the levels existing a year earlier. Moderate decreases were registered in farm stocks of wheat and oats, while increases took place in barley, rye and flaxseed.

Farm Stocks in the Prairie Provinces, July 31, 1952 and 1951

Province	Wheat	Oats	Barley	Rye	Flaxseed
- thousand bushels -					
Manitoba	1,000	4,000	2,000	100	150
Saskatchewan	10,000	22,000	7,000	500	165
Alberta	7,000	19,000	12,000	700	75
Totals, July 31, 1952	18,000	45,000	21,000	1,300	390
Totals, July 31, 1951	20,000	43,000	17,000	800	205

Canadian Wheat

Carryover, 1922-1952

Total stocks of Canadian wheat in all North American positions at July 31, 1952 were estimated at 213.0 million bushels as against 189.2 million on the same date last year. With the exception of an estimated 19.3 million bushels on farms, all of this year's July-end stocks were located in commercial positions. While the current carryover is the largest since 1945, it is 43.5 million below the ten-year (1941-1950) average of 256.5 million bushels. Carryover stocks during the first half of the 1941-1950 period, however, were at abnormally high levels and included the record 594.6 million bushels carried over on July 31, 1943.

It should be pointed out that the figures in the table below are not strictly comparable because of certain omissions in the earlier years. For example, figures for the years 1922 to 1931 do not include wheat afloat for United States ports. It should also be noted that from 1922 to 1931 the stocks of Canadian wheat in United States lake and seaboard ports are reported for the week-end nearest to the close of the crop year. Stocks of Canadian wheat held in bond by United States flour mills were omitted each year until 1940-41 when they were included for the first time. The carryover totals now include all Canadian wheat in North American positions whether on farms, in store or in transit.

Carryover of Canadian Wheat in Canada and the United States at July 31, 1922-1952

Year	Carryover of Wheat in Canada	Stocks of Canadian Wheat in U. S. Positions	Total Carryover of Canadian Wheat in Canada and U.S.
- thousand bushels -			
<u>At July 31</u>			
1922 <u>1/</u>	20,591	1,558	22,149
1923 <u>1/</u>	11,690	483	12,174
1924	45,159	2,958	48,117
1925	27,714	3,027	30,741
1926	36,475	3,664	40,139
1927	50,786	4,835	55,622
1928	77,547	13,610	91,157
1929	104,325	22,914	127,239
1930	110,517	16,065	126,582
9-year average 1922-1930	53,867	7,679	61,547
1931	133,060	5,538	138,598
1932	130,053	5,888	135,941
1933	209,969	7,688	217,657
1934	192,948	9,954	202,902
1935	202,148	11,705	213,852
1936	108,094	19,268	127,363
1937	32,938	4,111	37,049
1938	23,553	983	24,536
1939	94,632	8,279	102,911
1940	272,928	27,546	300,473
10-year average 1931-1940	140,032	10,096	150,128
1941	448,338	31,792	480,129
1942	404,897	18,856	423,752
1943	579,371	15,255	594,626
1944	338,138	18,394	356,531
1945	238,480	19,593	258,073
1946	73,466	134	73,600
1947	86,055	87	86,141
1948	77,676	35	77,710
1949	102,343	68	102,411
1950	112,200	-	112,200
10-year average 1941-1950	246,096	10,421	256,517
1951 <u>2/</u>	187,190	2,013	189,203
1952 <u>3/</u>	210,731	2,244	212,975

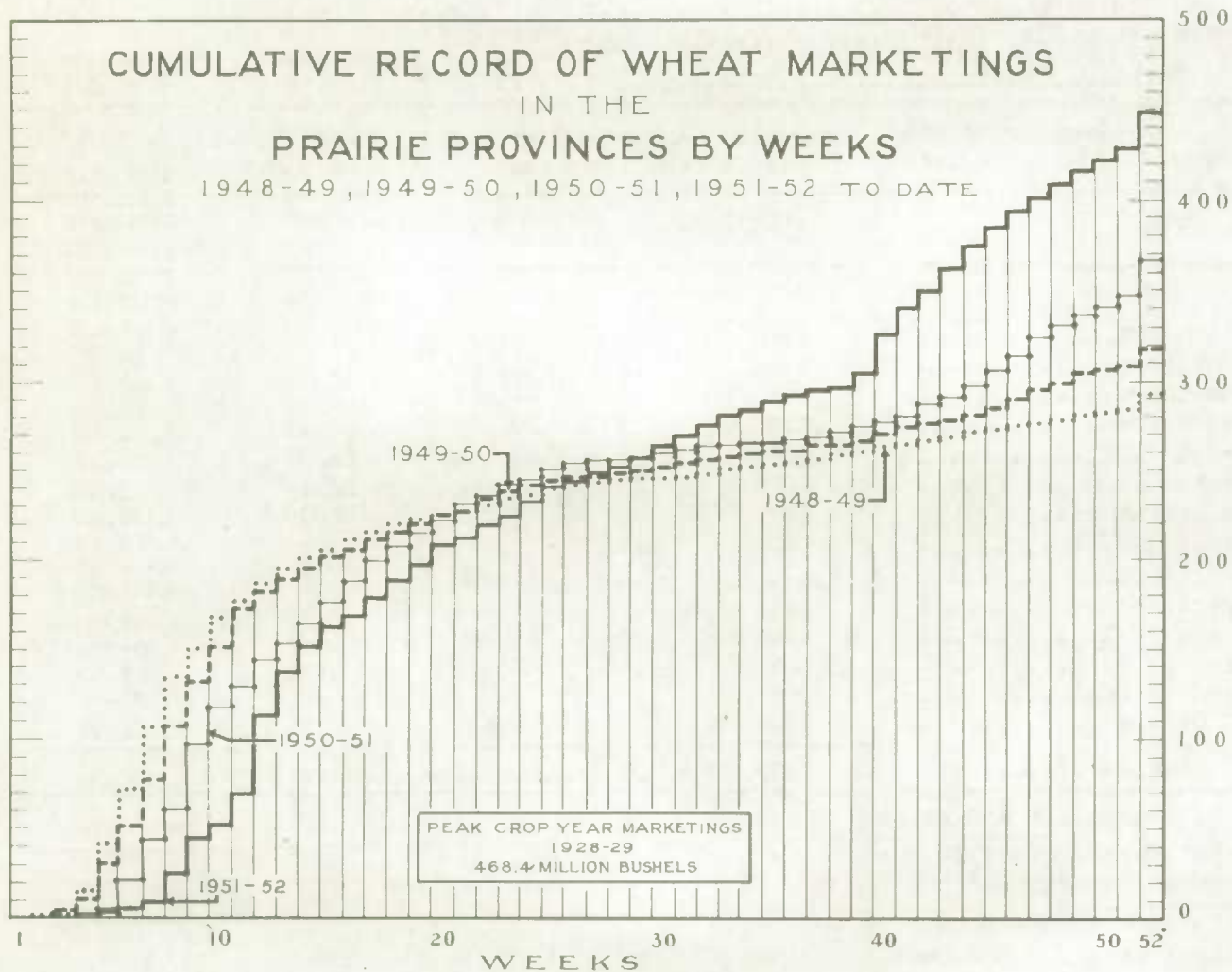
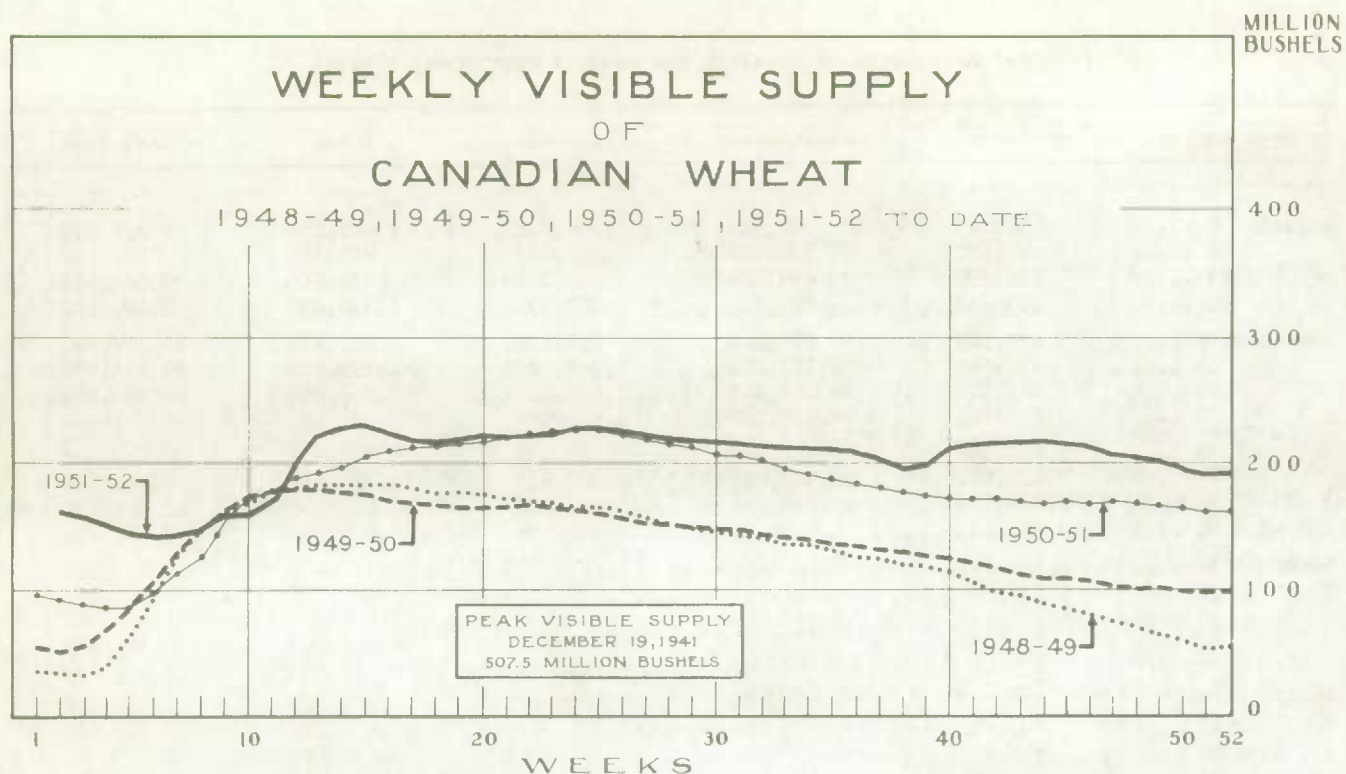
1/ Crop year ending August 31.

2/ Revised.

3/ Preliminary.

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
	20	386,576	2,984,427	1,312,502	4,683,505	676,453
	27	437,901	2,529,542	1,495,072	4,462,515	784,050
April	3	473,193	2,430,048	665,418	3,568,659	1,280,610
	10	368,863	745,829	294,179	1,408,871	1,470,348
	17	332,151	1,183,477	475,914	1,991,542	2,334,731
	24	521,172	5,936,946	3,362,652	9,820,770	2,255,561
May	1	764,771	11,883,831	7,116,011	19,764,613	2,548,298
	8	691,543	8,536,073	5,291,700	14,519,316	5,127,209
	15	484,652	5,251,486	4,483,875	10,220,013	6,677,334
	22	134,533	9,030,288	3,584,372	12,749,193	4,106,765
	29	781,025	8,266,194	3,394,427	12,441,646	6,645,557
June	5	411,813	6,185,077	3,058,584	9,655,474	8,095,851
	12	496,113	6,031,246	3,088,413	9,615,772	7,606,934
	19	452,111	3,902,940	1,554,232	5,909,283	9,992,313
	26	392,137	5,025,031	2,398,194	7,815,362	7,131,036
July	3	368,496	5,361,061	1,595,979	7,325,536	4,862,404
	10	243,471	4,028,169	1,838,975	6,110,615	4,669,861
	17	259,740	3,795,936	1,914,196	5,969,872	5,595,487
	24	376,068	5,295,614	2,168,526	7,840,208	
	31	661,586	7,365,605	3,823,956	11,851,147	19,949,216
Totals		44,353,086	271,993,156	132,433,090	448,779,332	367,681,391



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

Visible Supply of Canadian Wheat, August 21, 1952, Compared with
Approximately the Same Date, 1951 and 1950

Position	1952	1951	1950
- thousand bushels -			
Country elevators - Manitoba	3,417	2,338	1,347
Saskatchewan	46,159	41,377	5,569
Alberta	30,306	17,107	9,878
Totals	79,881	60,821	16,794
Interior private and mill elevators	5,155	3,945	3,959
Interior terminals	5,403	9,555	7
Vancouver-New Westminster	7,330	3,464	13,106
Prince Rupert	6	-	-
Churchill	1,116	2,200	1,215
Fort William-Port Arthur	20,428	32,723	18,417
In transit rail (Western Division)	16,518	10,517	3,967
Bay, Lake and Upper St. Lawrence ports	25,856	10,831	15,129
Lower St. Lawrence and Maritime ports	8,212	9,039	13,011
In transit lake	2,927	3,930	1,762
In transit rail (Eastern Division)	2,995	2,025	2
United States ports	1,424	1,370	185
In transit U.S.A.	-	370	4
Totals	177,252	150,792	87,556

Grading of Wheat Inspected, August-July, 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	890	0.4	8,885	4.8	14.8
2 Northern	10,216	4.1	30,407	16.4	37.6
3 Northern	39,978	16.0	28,607	15.5	13.0
4 Northern	27,879	11.2	20,108	10.9	4.4
5 Wheat	26,807	10.8	23,794	12.9	3.7
6 Wheat	14,201	5.7	18,664	10.1	2.2
Feed Wheat	2,107	0.8	3,762	2.0	0.4
Garnet	580	0.2	1,736	0.9	0.9
Amber Durum	3,493	1.4	5,094	2.8	3.5
Alberta Winter	314	0.1	691	0.4	0.7
Toughs 1/ 2/	87,590	35.2	33,259	18.0	15.6
Damps 1/ 3/	33,166	13.3	8,314	4.5	1.3
Dried 5 Wheat	7	4/	-	-	-
All Others	1,884	0.8	1,624	0.9	1.9
Totals	249,112	100.0	184,945	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.

4/ Less than .05 per cent.

Tough and Damp Grain Dried at Terminal Elevators, Western Division
August 1 to 21, 1952

Grain		Lakehead	Pacific Coast	Interior Points	Churchill	Total
- thousand bushels -						
Wheat 1/	Tough	175	559	-	-	734
	Damp	17	1	5	-	24
Durum Wheat	Tough	16	-	-	-	16
	Damp	2	-	-	-	2
Oats	Tough	59	19	-	-	78
	Damp	-	-	-	-	-
Barley	Tough	314	-	-	-	314
	Damp	93	-	-	-	93
Rye	Tough	7	-	-	-	7
	Damp	1	-	-	-	1
Flaxseed	Tough	36	-	-	-	36
	Damp	-	-	-	-	-
Totals	Tough	607	578	-	-	1,185
	Damp	112	1	5	-	119

1/ Other than durum.

Lake Shipments of Canadian Grain

Total shipments of the five major grains from Lakehead terminals from the opening of navigation to August 21 amounted to 252.1 million bushels, second only to the 276.8 million moved during the comparable period of 1945. Wheat shipments, at 138.2 million bushels, accounted for more than half the current crop-year total to date. Shipments of both oats and barley, at 56.6 million and 49.9 million bushels, respectively, set new records for the period under review. Rye shipments, at 4.5 million bushels, were slightly lower than those of last year but the 2.9 million bushels of flaxseed were more than three times last year's comparable total.

Lake Shipments of Canadian Grain from the Opening of Navigation to August 21, 1952
and to Approximately the Same Date, 1942 to 1951

Year	Wheat	Oats	Barley	Rye	Flaxseed	Total
- thousand bushels -						
1942	109,483	1,444	1,806	698	339	113,770
1943	109,460	22,542	26,073	1,286	2,585	161,946
1944	166,211	37,804	24,187	5,412	4,027	237,640
1945	194,514	54,823	22,238	3,191	1,989	276,755
1946	52,233	31,774	10,779	696	899	96,382
1947	83,325	24,632	11,204	1,786	28	120,974
1948	52,357	11,415	10,447	302	3,847	78,368
1949	76,509	13,946	14,377	5,840	4,767	115,440
1950	77,895	11,049	13,051	3,013	1,053	106,061
1951	91,634	33,278	23,440	4,664	845	153,861
1952	138,194	56,602	49,896	4,534	2,867	252,093

Wheat Shipments* to the United States by Destination, 1951-52
Compared with 1950-51 and 1949-50

Destination	1951-52	1950-51	1949-50
- bushels -			
<u>By Vessel</u>			
Duluth-Superior	6,239,921	3,933,027	-
Milwaukee	353,016	140,673	-
Chicago	1,378,340	605,693	192,766
Detroit	62,930	346,050	95,223
Toledo	-	108,485	-
Erie	93,107	212,606	-
Buffalo	24,069,342	13,619,001	12,007,640
Oswego	514,005	872,649	-
Huron	159,884	-	-
Totals, Vessel	32,870,545	19,838,184	12,295,629
<u>By Rail</u>			
U.S.A. Seaboard Ports	1,903,416	600,723	139,954
Other U.S.A. Points	6,190,275	3,484,233	1,098,886
Totals, Rail	8,093,691	4,084,956	1,238,840
Totals, Shipments	40,964,236	23,923,140	13,534,469

*Does not include shipments of wheat to Duluth or Buffalo for drying in bond.

Wheat shipments to the United States, either for re-export or retention for domestic use, during the 1951-52 crop year amounted to 41.0 million bushels, up sharply from the 23.9 million and 13.5 million bushels shipped during 1950-51 and 1949-50, respectively. In addition to the current crop year shipments shown in the above table, some 15.4 million bushels of wheat were shipped to terminals in Duluth and Buffalo for drying in bond.

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

Ports	August 1, 1951 to July 31, 1952	August 1, 1950 to July 31, 1951
- bushels -		
Collingwood	301,000	1,185,896
Midland	4,106,376	2,413,538
Owen Sound	1,426,039	413,975
Port McNicoll	3,528,654	2,085,592
Goderich	123,745	246,053
Sarnia	287,788	169,733
Walkerville	1,786	8,000
Humberstone	-	205,671
Toronto	5,672	124,154
Prescott	1,500	-
Totals	9,782,560	6,852,612

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	1,387,828	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	1,564,586	3,476,161	423,774	1,511,072
April	107,061	1,196,236	2,305,727	659,467
May	132,496	462,676	124,533	884,171
June	196,083	356,443	96,626	330,348
July	113,827	199,603	52,122	469,797
Totals	14,303,297	15,359,216	4,368,737	13,376,558

In keeping with the usual seasonal trend, rail shipments of wheat from the Lakehead have been relatively small following the opening of lake navigation. Shipments in July, at 113,827 bushels, were the second smallest monthly total for the current crop year and, for the fourth consecutive month, were below the 200,000-bushel level. Total rail shipments of wheat from the Lakehead for the 1951-52 crop year amounted to 14.3 million bushels, about 7 per cent below the 15.4 million shipped in 1950-51 but more than three times as large as the 1949-50 total of 4.4 million.

Distribution of the July, 1952 shipments by grade and destination is shown in the table below. With the exception of about 16,000 bushels going to the Maritime Provinces, the July shipments went to destinations in Ontario and Quebec.

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

Grade	P.E.I.	N.S.	N.B.	Que.	Ont.
- bushels -					
3 Northern	-	-	-	-	6,500
5 Wheat	-	5,398	-	83	-
6 Wheat	-	-	-	-	1,500
Amber Durum	1,500	1,500	4,463	14,946	29,306
Toughs	250	-	-	19,792	2,834
All others	1,333	-	1,444	8,019	14,959
Totals	3,083	6,898	5,907	42,840	55,099

Freight Assistance Shipments Claims filed for payment up to July 31, 1952 represent shipments of 15.2 million bushels of wheat from the Prairie Provinces to Eastern Canada and British Columbia under the freight assistance plan during the August—June period of 1951-52. This preliminary total, subject to upward revision with the filing of additional claims, already represents an increase of some 20 per cent over the revised total of 12.7 million bushels for the first eleven 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	421	237	1,331
September	4	17	56	39	464	473	231	1,284
October	8	14	71	54	559	522	233	1,460
November	11	23	84	60	776	673	291	1,917
December	4	20	66	32	489	495	212	1,318
January, 1952	7	27	68	47	667	637	246	1,699
February	4	16	60	37	464	480	210	1,271
March	4	17	75	49	475	561	194	1,375
April	7	21	76	51	379	545	213	1,291
May	5	23	81	52	476	544	179	1,361
June	1	21	43	28	306	419	27	845
Totals <u>1/</u>	59	227	747	509	5,569	5,768	2,272	15,151
Same period 1950-51								
Preliminary <u>2/</u>	34	197	619	395	4,437	4,157	1,805	11,644
Revised <u>1/</u>	36	205	648	415	4,664	4,324	2,381	12,672

In contrast to wheat shipments, preliminary data on freight-assisted mill-feed shipments during the first eleven months of 1951-52 represent a total of 479,397 tons, below both the preliminary and revised totals for the August—June period of 1950-51.

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

Province	Aug.1,1951 to June 30,1952	Aug.1,1950 to June 30, 1951	
	Preliminary <u>1/</u>	Preliminary <u>2/</u>	Revised <u>1/</u>
- tons -			
Newfoundland	2,693	2,608	2,862
Prince Edward Island ...	6,861	9,144	9,732
Nova Scotia	35,963	38,812	40,981
New Brunswick	31,258	32,758	34,359
Quebec	223,843	241,865	253,033
Ontario	135,751	150,661	160,821
British Columbia	43,028	36,249	47,019
Totals	479,397	512,097	548,807

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

2/ Based on claims filed up to July 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 ^{1/}	Exports of Canadian Wheat to U.S.A. for Domestic Use and Grinding in Bond ^{2/}	Customs Exports of Canadian Wheat Flour ^{3/}	Total	Customs ^{4/} Exports of 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</u>					
August	11,957	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	14,335	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	31,888	33,097
Totals	164,736	20,303	55,921	240,961	236,624
<u>1951-52 ^{5/}</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	3,683	20,459	37,347
January	14,382	1,620	3,407	19,409	18,523
February	16,010	2,574	4,180	22,764	18,472
March	15,876	1,215	5,354	22,445	21,904
April	16,657	3,342	4,389	24,388	30,516
May	35,550	2,725	5,391	43,666	38,138
June	33,770	4,554	5,942	44,266	40,894
July	34,478	3,818	5,374	43,670	44,782
Totals	266,039	38,683	51,335	356,056	358,803

^{1/} As compiled by the Statistics Branch, Board of Grain Commissioners for Canada.

^{2/} U.S.A. official figures used for imports of Canadian wheat for domestic use 1949-50. Data on shipments for grinding in bond since August 1949 and for domestic use since August 1950 have been compiled by the Statistics Branch, Board of Grain Commissioners for Canada, from returns of Canadian elevator licensees and shippers and advice from American grain correspondents.

^{3/} Exports for crop years 1949-50, 1950-51 and August, 1951 to April, 1952 revised to remove effect of time lag in the returns made by Customs. Subsequent months to be revised as data become available.

^{4/} Unadjusted, as published by the International Trade Division, D.B.S.

^{5/} Subject to revision.

Exports of Canadian Wheat and Wheat Flour, 1951-52

Destination	April	July		August—July	
	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	1,870,596	1,478,731	12,804,813	18,836,604	108,834,765
<u>Africa</u>					
British East Africa	-	-	-	576	-
Gambia	-	-	-	3,672	-
Gold Coast	-	-	-	114,416	-
Nigeria	4,293	24,125	-	103,932	-
Rhodesia	-	-	-	-	3,733
Sierra Leone	3,042	3,213	-	42,736	-
Union of South Africa	-	-	1,199,707	-	6,104,937
<u>Asia</u>					
Aden	-	-	-	57,406	-
British Malaya	22,622	26,906	-	153,991	-
Ceylon	383,107	-	-	830,443	-
Hong Kong	48,195	68,441	-	1,196,874	-
India	-	-	4,175,015	90	18,141,164
<u>Europe</u>					
Gibraltar	19,584	517	-	199,138	-
Malta	-	-	-	-	1,209,701
<u>North America</u>					
Bahamas	16,677	13,509	-	224,222	-
Barbados	15,961	29,642	-	399,631	792
Bermuda	9,626	8,406	-	122,904	-
British Honduras	2,983	4,729	-	50,188	-
Jamaica	68,395	230,634	-	1,579,658	-
Leeward and Windward Islands	66,263	79,614	-	985,087	-
Trinidad and Tobago	77,387	77,405	-	2,196,293	-
<u>South America</u>					
British Guiana	23,899	141,745	-	864,041	-
Totals, Commonwealth Countries.	2,632,630	2,187,617	18,179,535	27,961,902	134,295,092
<u>FOREIGN COUNTRIES</u>					
<u>Africa</u>					
Azores and Madeira	-	5,593	-	30,658	-
Belgian Congo	29,093	58,082	-	380,862	-
Canary Islands	-	-	-	46,310	-
Egypt	-	685,561	-	1,490,742	424,015
French Africa	-	-	-	11,911	2,589,410
Liberia	-	576	-	7,277	-
Morocco	25,902	32,688	-	432,000	-
Portuguese Africa	17,901	715	-	171,004	-
Tripoli	51,412	-	-	160,695	445,180
<u>Asia</u>					
Arabia	8,307	-	-	139,420	-
China	-	-	-	3,960	-
Indonesia	345,807	10,328	-	800,596	-
Iraq	-	-	-	513	-
Israel	76,104	-	352,800	680,552	1,979,180
Japan	46,013	70,402	681,333	441,540	16,480,628
Korea	-	-	-	9,184	-
Lebanon	-	-	-	1,007,019	-
Philippine Islands	155,691	891,563	-	4,878,365	-
Portuguese Asia	-	-	-	86,040	-
Siam	8,721	23,494	-	183,519	-
Syria	-	-	-	579,775	2,398,180
<u>Europe</u>					
Austria	-	-	418,055	-	1,076,365
Belgium	-	-	1,024,795	49,955	15,451,754

Exports of Canadian Wheat and Wheat Flour, 1951-52

Destination	April	July		August—July	
	Wheat Flour 1/2/	Wheat Flour 2/	Wheat 3/	Wheat Flour 2/4/	Wheat 3/
	- bushels -	- bushels -		- bushels -	
FOREIGN COUNTRIES					
Europe					
Denmark	-	-	300,000	1,147	837,600
Finland	-	-	281,467	-	671,134
France	-	-	-	5,278	6,761,510
Germany	23,769	-	4,608,930	157,081	15,772,915
Greece	-	-	695,242	56,704	695,242
Iceland	1,517	13,190	-	121,527	-
Ireland	-	-	866,586	-	8,408,862
Italy	407,673	818,546	1,084,533	2,758,924	10,961,011
Netherlands	-	-	1,392,152	-	11,930,438
Norway	-	-	474,136	-	4,704,553
Portugal	2,065	1,642	-	27,832	606,733
Spain	-	-	586,529	-	1,406,862
Sweden	-	-	-	-	1,962,771
Switzerland	-	-	690,694	-	7,677,909
Yugoslavia	1,836	-	1,766,640	28,917	4,562,204
North America					
Alaska	-	-	-	112	-
Costa Rica	53,465	10,953	-	494,618	41,867
Cuba	187,132	59,324	365,904	2,088,378	1,288,638
Dominican Republic	38,462	13,716	-	251,955	3,800
El Salvador	37,737	5,620	-	276,885	-
French West Indies	135	-	-	6,178	-
Guatemala	25,452	-	-	316,962	-
Haiti	49,608	12,829	-	482,773	-
Honduras	-	-	-	5,507	10,000
Netherlands Antilles	10,998	19,067	-	188,978	-
Nicaragua	24,268	21,362	-	191,494	-
Panama	25,686	11,502	-	212,823	-
St. Pierre and Miquelon	3,393	1,719	-	21,704	-
United States					
Flour in terms of wheat	3,217	9,045	-	285,088	-
For grinding in bond 5/	-	-	478,591	-	7,327,562
For domestic use 5/	-	-	3,339,316	-	31,355,268
Virgin Islands	2,295	-	-	12,586	-
Oceania					
French Oceania	5,058	-	-	37,548	-
Guam	-	-	-	45	-
Hawaii	-	-	-	6,656	-
South America					
Bolivia	-	-	111,258	2,295	1,970,827
Brazil	-	-	-	-	3,824,012
Chile	-	-	-	-	2,946,387
Colombia	29,007	8,824	-	249,364	233,322
Ecuador	10,409	3,785	-	266,373	55,115
Peru	-	-	593,787	-	3,552,440
Surinam	5,818	13,563	-	96,912	-
Venezuela	41,958	382,860	3,181	3,128,099	13,170
Totals, Foreign Countries	1,755,909	3,186,549	20,115,929	23,372,640	170,426,864
Totals, Exported	4,388,539	5,374,166	38,295,464	51,334,542	304,721,956

1/ Exports for April, 1952 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, 1951 to April, 1952 revised to remove effect of time lag in the returns made by Customs.

5/ Compiled from returns of Canadian elevator licensees and shippers 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			
	Aug. 2	Aug. 9	Aug. 16	Aug. 23
- cents and eighths per bushel -				
<u>Initial Payment to Producers 1952-53 Pool</u>				
1 Hard	156	140	140	140
1 Northern	156	140	140	140
2 Northern	153	137	137	137
3 Northern	150	134	134	134
4 Northern	142	126	126	126
5 Wheat	132	116	116	116
6 Wheat	122	106	106	106
Feed Wheat	116	100	100	100
<u>Domestic and Export ^{1/}</u> (International Wheat Agreement)				
1 Hard	174	173/1	172/7	173
1 Northern	174	173/1	172/7	173
2 Northern	172	171/1	170/7	171
3 Northern	170	169/1	168/7	169
4 Northern	164	163/1	162/7	163
5 Wheat	156	155/1	155/5	156
6 Wheat	151	150/1	151/7	152
Feed Wheat	145	144/1	146/7	147
1 C.W. Garnet	172	171/1	170/7	171
2 C.W. Garnet	171	170/1	169/7	170
3 C.W. Garnet	168	167/1	166/7	167
1 Alberta Red Winter	174	173/1	172/7	173
2 Alberta Winter	172	171/1	170/7	171
3 Alberta Winter	170	169/1	168/7	169
1 C.W. Amber Durum	174	173/1	172/7	173
2 C.W. Amber Durum	172	171/1	170/7	171
3 C.W. Amber Durum	171	170/1	169/7	170
<u>Export - Class II</u>				
1 Hard	215	214/5	215/7	218/1
1 Northern	215	214/5	215/7	218/1
2 Northern	213	212/5	213/7	216/1
3 Northern	211	210/5	211/7	214/1
4 Northern	205	204/5	205/7	208/1
5 Wheat	162	161/1	161/5	162
6 Wheat	157	156/1	157/7	158
Feed Wheat	151	150/1	152/7	153
1 C.W. Amber Durum	222	221/5	222/7	225/1
2 C.W. Amber Durum	220	219/5	220/7	223/1
3 C.W. Amber Durum	219	218/5	219/7	222/1

^{1/} Plus 6 cents carrying charge.

CANADIAN FLOUR MILLING SITUATION

Production Wheat flour production reported by Canadian mills for July, 1952 amounted to some 1,937,000 barrels, somewhat below the June, 1952 output of 2,082,000 barrels but well above the 1,401,000 barrels produced in July, 1951. Mills reporting operations during July, 1952 had a rated capacity of 95,440 barrels and, on the basis of a 26-day working period, 78.1 per cent of this capacity was effective. Preliminary figures on wheat flour production for the 1951-52 crop year indicate a total of 22.8 million barrels as against 23.6 million in 1950-51 and the record of 28.6 million in 1946-47. Mill grindings during 1951-52 totalled 104.5 million bushels, compared with 106.7 million in 1950-51 and the record of 127.8 million in 1946-47.

Exports According to preliminary Customs returns, exports of Canadian wheat flour during July, 1952 amounted to 1,194,259 barrels (5.4 million bushels of wheat equivalent). Flour shipments during the month were reported to 41 countries with the largest amount, some 1.5 million bushels of wheat equivalent, going to the United Kingdom. Other major shipments, in thousand bushels of wheat equivalent, went to the Philippine Islands (892), Italy (819), Egypt (686), Venezuela (383), and Jamaica (231).

Wheat Milled for Flour, and Production and Exports of Wheat Flour, Canada

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—1944-45 average	99,704,638	22,402,166	12,091,605
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 ^{2/}</u>			
August	7,747,885	1,699,569	573,624
September	8,173,807	1,797,624	700,228
October	8,832,670	1,926,302	855,721
November	8,957,474	1,944,215	896,318
December	8,064,982	1,755,062	818,436
January	8,505,951	1,844,408	757,059
February	8,378,104	1,812,383	928,792
March	8,804,729	1,926,301	1,189,668
April	8,994,401	1,973,994	975,231
May	9,758,260	2,145,508	1,197,991
June	9,464,843	2,081,788	1,320,349
July	8,838,775	1,936,945	1,194,259
Totals	104,521,881	22,844,099	11,407,676

^{1/} Based on Customs returns. Exports for the crop years 1945-46 to 1950-51 and August, 1951 to April, 1952 revised to remove effect of time lag in the returns made by Customs. Subsequent months to be revised as data become available.

^{2/} Wheat milled for flour and wheat flour production subject to revision.

UNITED STATES SITUATION

Supply Position According to the latest available estimates supplies of wheat in the United States for the crop year 1952-53 exceed those of 1951-52 by nearly 170 million bushels. This increase is entirely attributable to the very large 1952 crop since the carryover at July 1, 1952 was far below that at the beginning of the 1951-52 crop year. Based on conditions at August 1, the 1952 U.S. wheat crop is placed at 1,298.4 million bushels as against 987.5 million in 1951. Carryover stocks in all positions at July 1, 1952 were estimated at 253.9 million bushels while stocks on the same date in 1951 amounted to 396.2 million. As in 1951-52 it is expected that total domestic supplies for 1952-53 will be supplemented by imports of sizable quantities of Canadian wheat of feeding quality.

United States Wheat Supplies

Item	1952-53 <u>1/</u>	1951-52
	- million bushels -	
Carryover at July 1	253.9	396.2
New crop	1,298.4 <u>2/</u>	987.5
Total estimated domestic supplies	1,552.3	1,383.7
Imports of wheat for domestic use, July	3.3	2.1
Total estimated supplies <u>3/</u>	1,555.6	1,385.8
Less estimated domestic requirements for crop year <u>4/</u> .	700.0	686.7 <u>5/</u>
Available for export and carryover	855.6	699.1
Deduct:		
Exports of wheat as grain, July	18.3	27.5 <u>5/</u>
Exports of wheat flour and macaroni in terms of wheat, July	3.0	1.4 <u>5/</u>
Total exports of wheat, wheat flour and macaroni .	21.3	28.9
Balance on August 1 for export and carryover	834.3	670.2

1/ Preliminary. 2/ Official estimate as of August 1, 1952. 3/ Excluding imports for August-June period. 4/ Includes allowances for shipments of United States wheat and wheat products to Alaska, Hawaii, Puerto Rico, Guam, Samoa, Virgin Islands and Wake Island. These shipments are not included in exports as set out in the table. 5/ Revised.

Estimated domestic requirements for 1952-53 are placed at 700 million bushels as against approximately 687 million in 1951-52. On the basis of estimated supplies and domestic requirements, supplies available for export and carryover during the current crop year amount to some 856 million bushels as against 699 million in 1950-51. Exports of wheat as grain during July 1952 totalled 18.3 million bushels while the equivalent of another 3.0 million was exported in the form of wheat flour and macaroni. Comparable figures for July last year were 27.5 million and 1.4 million bushels, respectively. Latest revised figures for exports for the entire 1951-52 crop year are 473.2 million bushels, consisting of 430.6 million bushels of wheat as grain and the balance in wheat flour and macaroni in

terms of wheat. The balance on August 1, 1952 for export and carryover was estimated at 834.3 million bushels as against 670.2 million on the same date last year.

Wheat Acreage Goal
Set at 72 Million
Acres for 1953

A national production goal of 72 million seeded acres for the 1953 wheat crop was announced on July 16. This is about 8 per cent below the big acreage seeded for harvest this year, but above the 1942-51 average of 70.6 million acres.

With average yields, the 1953 goal acreage would result in a crop of about 1,080 million bushels of wheat—about 170 million bushels below this year's estimated high production. A crop of this size would meet all anticipated requirements for the marketing year, both domestic and export, and probably add some to reserves.

Commenting on the goals announced, the Secretary of Agriculture said: "The large 1952 crop makes it possible to establish a production level for 1953 which is below that of recent years. The goal for 1953, however, is kept on the side of abundance to play safe in the mobilization period. The goal also recognizes that wheat, being a universal grain, may be substituted for other grains in case an emergency should arise requiring such use of wheat."

In late June, the Secretary announced that there would be no wheat acreage allotments or marketing controls for 1953 in view of the uncertainty of world conditions.

New Crop Loan
Set at \$2.20
Per Bushel

According to the July issue of 'The Wheat Situation' the wheat price support (announced on June 30) for the 1952 crop was set at a national average of \$2.20 per bushel. Last year's average was \$2.18 a bushel. The price support was set at 90 per cent of parity* as of the beginning of the marketing year, July 1. Parity on that date was \$2.45 a bushel compared with \$2.41 on the same date last year. The loans and purchase agreements will be available through January 1953, and will mature April 30, 1953, or earlier on demand. Terminal market price support rates per bushel are as follows: No. 2 Hard Winter at Kansas City, \$2.48; No. 1 Dark Northern Spring at Minneapolis, \$2.51; No. 2 Soft Red at St. Louis, \$2.52; and No. 1 Soft White at Portland, \$2.44. Only wheat grading No. 3 or better, or No. 4 or No. 5 because of test weight or because it contains wheat of the classes Durum and/or Red Durum, will be eligible for loan or purchase agreement.

Recent legislation has delayed the change from dual parity choice for the basic farm crops for price support purposes for two additional years. Since parity for wheat computed on the old basis is higher than when computed using the new formula, this legislation means that the old parity will continue to be used to determine the support levels for the 1954 and 1955 crops. This law also requires the 1953 and 1954 crops of basic commodities to be supported at 90 per cent of parity except when producers disapprove marketing quotas.

*Parity (Old) is determined by multiplying the base price of 88.4 cents per bushels (average of 60 months from August 1909 to July 1914) by the index of prices paid, interest and taxes (1910-14 = 100) which in mid-June 1952 was 277 per cent. The resulting parity is \$2.45.

Estimate of 1952 Wheat
Crop Increased to
1,298 Million Bushels

In a report based on conditions at August 1, the Crop Reporting Board of the Bureau of Agricultural Economics estimated the 1952 all wheat crop at 1,298 million bushels, 49 million bushels above July 1 prospects. A crop this size would be second only to the 1947 crop when aggregate production of winter and spring wheat was 1,359 million bushels. The current estimate compares with a 1951 crop of 987 million bushels and the average of 1,085 million bushels. Indicated winter wheat production is 417 million bushels larger than that of 1951 while spring wheat is expected to be 106 million bushels below the relatively large crop of last year.

Harvest of winter wheat was nearly complete in all but the extreme northern and mountain areas by August 1. On the whole, combining and threshing have progressed rapidly throughout the harvest season and under unusually favourable weather conditions. In Kansas, however, the dry, hot weather before and during harvest contributed to an excessive amount of shattering and field loss of matured, heavy grain before harvest was greater than usual. Dry conditions which developed in Tennessee, Kentucky, and adjacent southeastern areas as wheat approached maturity favoured this crop and generally contributed to higher yields of exceptionally good quality grain. The 1952 yield of all wheat is estimated at 18.4 bushels per acre, compared with 16.1 last year and the 10-year average of 17.2 bushels.

According to August 1 reports, winter wheat production is indicated at 1,063 million bushels, 14 million bushels more than a month earlier and the largest of record. Harvest operations are virtually complete in all but the northern areas of the country and at the higher altitudes in other States. Current estimated production exceeds the 1951 crop of 645 million bushels by 65 per cent and is 33 per cent or 263 million bushels larger than average. The indicated U. S. yield per harvested acre of 21.1 bushels compares with a 16.2 bushel yield in 1951 and an average of 17.7 bushels.

All spring wheat production is now estimated at 236 million bushels, 35 million bushels more than a month ago. The indicated crop is about one-third smaller than the 1951 crop of 342 million bushels and a sixth smaller than the average of 285 million bushels. Weather during July was generally favourable for the development of the crop in the important spring wheat States, with late June and early July rainfall providing much needed moisture. With soil moisture adequate for plant growth and development, dry weather in late July helped to retard rust infestation in the eastern portions of North Dakota and South Dakota and in western Minnesota. Of the important spring wheat States, South Dakota is the only one where yield prospects are lower than a month ago. Yield prospects in Minnesota, North Dakota, Montana, Idaho and Washington are up from 1.5 to 2.5 bushels per acre from last month. The prospective yield for the country as a whole is 11.7 bushels, compared with 15.8 bushels last year and the ten-year average of 15.9 bushels.

Production of durum wheat (included with spring wheat above) is now estimated at 23,366,000 bushels. This is 2,388,000 bushels above a month ago as increased yields in North Dakota and Minnesota more than offset a reduction of 338,000 bushels in South Dakota. It is 35 per cent less than the 1951 production of 35,820,000 bushels and 38 per cent less than the 10-year average of 37,950,000 bushels. Rust damage in durum wheat has been heavier than in other spring wheat and was mainly responsible for the deterioration in the South Dakota crop. Improved moisture conditions in North Dakota and Minnesota more than offset the rust damage on durum wheat there. (continued on page 33).

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
July	28, 1952	225 1/2 - 233	July	28, 1952	235 3/4 - 237 3/4
	29	225 3/4 - 234		29	233 1/2 - 236 1/2
	30	226 1/4 - 232 3/4		30	233 7/8 - 236 7/8
	31	228 1/2 - 233		31	235 1/8 - 238 1/8
August	1	227 1/2 - 233	August	1	235 1/8 - 238 1/8
	2	Market Closed		2	Market Closed
	4	228 - 236 1/2		4	235 1/2 - 237 1/2
	5	226 3/4 - 234 1/2		5	235 7/8 - 237 7/8
	6	227 1/4 - 233 1/4		6	237 7/8 - 239 7/8
	7	228 - 234 1/2		7	237 7/8 - 239 7/8
	8	228 - 232 1/2		8	239 3/4 - 240 3/4
	9	Market Closed		9	Market Closed
	11	228 1/4 - 230 1/4		11	237 1/4 - 239 1/4
	12	228 1/2 - 234 1/4		12	238 1/8 - 239 1/8
	13	231 1/4 - 231 3/4		13	237 5/8 - 239 5/8
	14	229 - 235		14	237 1/2 - 239 1/2
	15	232 3/4 - 238		15	237 1/4 - 239 1/4
	16	Market Closed		16	Market Closed
	18	232 3/4 - 238 1/4		18	236 1/4 - 238 1/4
	19	232 1/2 - 238		19	236 1/8 - 238 1/8
	20	233 3/4 - 238 1/4		20	235 7/8 - 237 7/8
	21	233 - 236		21	237 1/8 - 238 1/8
	22	232 1/2 - 238		22	236 7/8 - 237 7/8
	23	Market Closed		23	Market Closed

Chicago Wheat Futures, High Points of Closing

Date	September	December	March	May	July
		- cents and eighths per bushel -			
July 28, 1952	233/5	239/5	244	243/6	
29	232/7	238/7	243/4	242/7	
30	233/4	239/3	244/1	243/3	
31	234/3	240/1	244/4	244/1	
August 1	234/1	239/7	244/3	244/1	
2		Market Closed			
4	234	240	244/6	245	
5	233/7	240	244/6	245/2	
6	235/6	242	247/1	247/4	
7	234/6	241/3	246/2	246/7	
8	234/5	240/7	245/6	246/3	
9		Market Closed			
11	233/2	239/7	245	245/4	
12	233/5	240/1	245/3	245/7	
13	234/2	240/6	245/5	246/1	
14	234/6	241	246	246	
15	234	240/5	245/4	245/7	
16		Market Closed			
18	233/1	239/7	245	245/1	240/1
19	232	238/6	243/7	244/3	239/2
20	231	238	243/2	243/7	239
21	231/4	237/6	243/3	244/4	239/7
22	231/2	237/7	243/2	244/4	240/2
23		Market Closed			

ARGENTINE SITUATION

Supply Position The only recent indication of a change in Argentina's current crop year wheat supplies has been the government's announcement that 260,000 metric tons of Argentine corn will be exchanged for 200,000 tons (7.3 million bushels) of imported wheat. The necessity for importation of wheat results from the combination of last year's abnormally small crop of 75.3 million bushels and the relatively low carryover of 11.0 million bushels. Exports have been confined to small shipments against old contracts and have amounted to only 3.8 million bushels in the first eight months of 1951-52 as against 74.3 million for the December--July period of 1950-51. The balance remaining on August 1, 1952 for export and carryover was estimated at 3.5 million bushels, compared with 31.9 million on the same date a year ago.

Argentine Wheat Supplies

Item	1951-52 1/	1950-51 2/
	- million bushels -	
Carryover at beginning of crop year (December 1)	11.0	7.3
New crop	75.3	213.1
Total estimated supplies	86.3	220.4
Less estimated domestic requirements for crop year	79.0	114.2
Available for export and carryover	7.3	106.2
Deduct:		
Exports of wheat as grain, December 1--July 31	3.8	74.3
Exports of wheat flour in terms of wheat, December 1--July 31	3/	3/
Total exports of wheat and wheat flour	3.8	74.3
Balance on August 1 for export and carryover	3.5	31.9

1/ Preliminary. 2/ Subject to revision. 3/ Less than 50,000 bushels.

The following account of the Argentine situation has been extracted from a report from Mr. W. B. McCullough, Agricultural Secretary, Canadian Embassy, Buenos Aires, under date of August 14, 1952, and is reproduced with the kind permission of the Trade Commissioner Service, Department of Trade and Commerce. Where practicable, conversions from Argentine to Canadian measures have been made for the convenience of our readers. Currency conversions have been made at the rate of 5 pesos to the United States dollar.

Weather and Crops Over the past four weeks the weather has been generally fine with moderate to heavy frosts, which has been ideal for new grain crops. Throughout the grain belt there is a fairly good moisture reserve except in small areas in northern Santa Fé province. There were heavy rains the last week of July throughout the province of Buenos Aires so that moisture is

abundant with grain and pastures from good to excellent. In other areas, while there was enough moisture for grain there was not enough for good growth in natural pastures which, coupled with heavy frosts, forced ranchers to supplement with reserves of hay.

Seeding of wheat and flax is completed in the northern belt and continuing in the south. Brewers' barley is still being sown in all areas and many are ploughing for corn. Generally, conditions are satisfactory for this time of year but most zones will need a minimum of one inch of rain in September and again in October to make good grain crops.

Wheat During the week of August 9th, the writer visited the grain areas in north-western Buenos Aires province and in the provinces of Santa Fé and Córdoba, generally referred to as the northern grain zone. In general, the condition of the wheat crop in these areas is from very good to excellent. Moisture conditions are generally good and all fields show excellent germination and growth. Wheat is about 6 inches high with uniformly good stands. Frosts and cool weather have favoured root development. The seeded area is definitely larger than last year but in some districts does not reach that of 1950-51. In the provinces of Córdoba and Santa Fé, the area sown last year was officially estimated at 1,686,000 hectares (4,164,000 acres) and in 1950-51 at 2,973,800 hectares (7,345,000 acres).

No official estimate has appeared on the current acreage and none is expected for some time. Trade opinions agree that the area sown to wheat this year is well above last and comparable to 1950-51 in which year it was officially estimated at 6,554,200 hectares (16,189,000 acres). Some of the more optimistic place the figure at around 7 million hectares (17.3 million acres) but most estimate between 6 and 6.5 million (14.8 and 16.1 million acres).

Wheat for Corn Barter Deal The Argentine Government has agreed to a barter deal whereby 260,000 tons (10.2 million bushels) of Argentine corn will be exchanged for 200,000 tons (7.3 million bushels) of imported wheat. This is an arrangement with grain dealers who will purchase wheat in exchange for corn in the proportion of 130 units of corn for 100 units of wheat. The dealers have purchased No. 2 Hard U.S. wheat for cash, shipment Gulf ports, August-September. The dealers will market the corn in Europe, mainly France, in a deal which will include barley from North Africa. This is the first occasion in Argentina's history on which they have had to import wheat.

I.A.P.I. Modifies Corn Purchase Procedure The Minister of Foreign Trade announced on August 13 that I.A.P.I. will purchase corn in the crib, warehouse or other locations before it is degrained on the basis of estimated yield, taking into account quality, moisture content and condition of storage. This places I.A.P.I. in a competitive buying position with domestic consumers. Producers can sell their crop to I.A.P.I. before degrading and for those who do so the Banco de la Nación agrees to advance loans without interest or other charges. These measures are to provide incentive for producers to sell to I.A.P.I. as to date this entity has been able to purchase only about 120,000 tons (4.7 million bushels) whereas in addition to the sales already made they require 260,000 tons (10.2 million bushels) to cover the barter deal for 200,000 tons (7.3 million bushels) of wheat.

Argentine-Italian Trade Agreement Under the terms of the Argentine-Italian trade agreement signed in Rome on June 25, Italy is to receive 300,000 metric tons (11.0 million bushels) of wheat from Argentina during 1953 and 500,000 tons (18.4 million bushels) in each of the four succeeding years of the agreement. The price is to be subject to annual adjustment. During 1952 Italy has not received any wheat from Argentina but in 1950 shipments totalled 508,670 tons (18.7 million bushels) and in the years following World War II, after Brazil, Italy was the next best market for Argentine wheat.

The same agreement provides for the export from Argentina of corn, barley, rye, oats and oilcakes to a value of 15,300,000 dollars per annum.

I.A.P.I. Participation in Marketing of Wheat The Argentine Trade Promotion Institute (I.A.P.I.) has announced that it will receive offers of 1951-52 crop wheat, oats, barley and rye until August 31, thus extending the original expiry date by one month.

According to a report issued by the Ministry of Foreign Trade, purchases by I.A.P.I. of the 1951-52 wheat crop up to the end of June totalled 1,686,984 metric tons (62.0 million bushels). This compares with nearly 5 million tons (183.7 million bushels) of wheat purchased by this entity in 1951.

Registered Seed In accordance with official policy to assist agricultural production in all its phases, the Ministry of Agriculture is subsidizing the supply of registered seed for the 1952-53 corn, sunflower and rice crops. The prices at which these seeds will be purchased and sold by the Ministry are as follows:

Prices Established for Registered Seed for 1952-53 Crops

	Buying				Selling			
	Original	Multiplications			Original	Multiplications		
		1st	2nd	3rd		1st	2nd	3rd
	- pesos per sack of 60 kilos -							
Corn	45.00	40.00	38.00	36.00	36.00	34.00	32.00	30.00
Sunflower .	39.00	36.00	34.00	31.00	35.00	33.00	31.00	29.00
Rice	92.00	88.00	-	-	85.00	81.00	-	-

Grain Shipments Exports of grain in July totalled 16,254 metric tons comprising 14,125 tons (556,100 bushels) of corn, 329 tons (12,900 bushels) of flax and 1,800 tons (116,700 bushels) of oats. Corn shipments were destined chiefly for France, receiving 8,543 tons (336,300 bushels) while Austria and Belgium received 5,205 tons (204,900 bushels) and 377 tons (14,800 bushels) respectively. Chile was the sole destination for flax and Germany for oats.

July shipments brought cumulative grain exports from Argentina for the first seven months of the year to 693,678 metric tons compared to 2,333,516 tons in the corresponding period of 1951 and 3,032,972 tons in 1950.

The following are Argentine grain shipments by destination for the first seven months of 1952:

Argentine Grain Shipments, January—July, 1952

Destination	Wheat	Corn	Flax	Oats	Rye	Barley
- thousand bushels -						
Austria	-	579	-	-	-	-
Belgium	-	1,794	71	63	146	-
Brazil	1,049	-	-	6	-	-
Chile	-	264	22	-	-	-
Denmark	-	-	-	-	-	607
Finland	-	-	-	-	1,544	-
France	-	5,407	647	-	-	-
Germany	-	574	25	453	567	3,081
Netherlands	-	203	19	534	285	191
Norway	-	79	79	-	110	-
Paraguay	636	-	-	-	-	-
Peru	580	394	-	-	-	-
Sweden	-	3,352	85	834	1,664	850
Switzerland	-	340	-	595	70	78
United Kingdom	-	639	7	-	-	-
Yugoslavia	-	289	-	-	-	-
Totals	2,265	13,913	955	2,485	4,385	4,806

AUSTRALIAN SITUATION

Supply Position

Supplies available for export and carryover during the crop year 1951-52 amounted to 96.9 million bushels compared with 143.8 million in the previous crop year. Reflecting this disparity in supplies, exports of both wheat and flour are running well below last year's levels. Exports of wheat as grain in the December 1—August 2 period of the current crop year amounted to 30.6 million bushels as against 59.5 million for the comparable period of 1950-51. The major markets for this year's Australian wheat exports for the period under review, with quantities in millions of bushels, were the United Kingdom (11.9), New Zealand (6.1), India 5.4), the Netherlands (2.2), and Italy (1.5). Exports of wheat flour in terms of wheat for the same period amounted to 23.6 million bushels, as against 28.6 million a year ago, with the main outlets this year being Ceylon, Malaya, the United Kingdom, India, and Indonesia. The balance remaining on August 3, 1952 for export and carryover was estimated at 42.7 million bushels, compared with 55.7 million a year ago.

Australian Wheat Supplies

Item	1951-52 <u>1/</u>	1950-51 <u>2/</u>
- 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	84.0	84.3
Available for export and carryover	96.9	143.8
Deduct:		
Exports of wheat as grain, December 1—August 2	30.6	59.5
Exports of wheat flour in terms of wheat, December 1—August 2	23.6	28.6
Total exports of wheat and wheat flour	54.2	88.1
Balance on August 3 for export and carryover	42.7	55.7

1/ Preliminary. 2/ Subject to revision.

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

"Australian wheat stocks at August 2nd totalled 66,120,000 bushels. Wheat exports from December 1st 1951 to August 2nd totalled 30,561,000 bushels, with shipments during preceding four weeks mainly to the United Kingdom. Flour exports for the same period were 455,059 long tons, with 13,499 to United Kingdom, 9,559 to Ceylon, 8,227 to Malaya and 6,174 to Indonesia. Talks on wheat stabilization plan will be held in Canberra on August 29th. If guaranteed price plan is to be continued the State Parliaments will have to pass necessary legislation."

New Marketing Plan Proposed The following press dispatch by R. L. Curthoys from Melbourne, under date of August 2, outlines the major points of the stabilization plan referred to in the above cable:

"A new plan, having the backing of the Australian Wheat Growers' federation, for the marketing of wheat, to replace the current price stabilization plan which expires with the 1952-53 crop, is to be submitted to the next meeting of the Australian Agricultural council which comprises the Commonwealth and State ministers for agriculture.

The major points of the plan are:

1. Retention of the Australian Wheat Board to market the annual crop and arrange its own finance, the board to be elected by growers and to be free from governmental control.

2. Payment of the price prescribed by the International Wheat Agreement for f.a.q. wheat for local consumption both as flour and as stock feed, with

premiums for special quality grain.

3. Failing an international agreement or its expiry before a period of five years, the maximum price to be the ruling free market price less 28 cents a bushel and the minimum price to be determined from index figures representing the current season's average cost of production plus a reasonable margin of profit, this calculation to be made by the Bureau of Agricultural Economics and to include all the Wheat Board's expenses for interest, railage, storage, wastage, etc., this price to operate if and when the export value falls below it.

4. The Commonwealth government to guarantee the same minimum price for the export surplus as is prescribed for local consumption sales, namely cost of production plus a fair profit. Growers to contribute one shilling a bushel from all export sales above the guaranteed price toward meeting any deficit if the export price fell, provided that the government should defray any loss in excess of the growers' contribution during the five seasons mentioned above by a grant from the treasury. A limit to be placed on the stabilization fund provided by growers and any excess to be refunded periodically to growers."

Continued from page 26 Late maturing durum wheat may suffer more damage than early seedings but most of the crop is nearing maturity and is expected to escape serious damage. About one-fifth of the crop in South Dakota was threshed or combined by August 1, while harvesting was just getting under way in North Dakota and Minnesota. The estimated yield for the U. S. is 10.8 bushels per acre compared with 14.2 bushels in 1951 and the average of 15.0 bushels for the preceding ten years.

PRELIMINARY DATA ON CANADIAN CROP YEAR 1951-52

Farmers marketings of all wheat in the Prairie Provinces during 1951-52 amounted to 448.8 million bushels. Marketings by provinces, in millions of bushels, were as follows: Manitoba, 44.4; Saskatchewan 272.0; and Alberta (including Peace River Block of British Columbia), 132.4.

Inspections of western wheat (both old and new crop) by the Board of Grain Commissioners amounted to 249,112 cars of which about 32 per cent graded No. 4 Northern or higher (straight grades only).

Receipts and shipments of all wheat at Fort William-Port Arthur totalled 250.3 million and 267.5 million bushels, respectively. Of the shipments, 253.2 million bushels moved by water and 14.3 million by rail.

Wheat dried at terminal elevators in the Western Division consisted of 34.7 million bushels of tough grades and 33.5 million bushels of damp grades. In addition to these quantities, some 15.4 million bushels of wheat were shipped to United States terminals for drying in bond.

Exports of wheat and flour in terms of wheat amounted to 356.1 million bushels of which 304.7 million were exported in the form of wheat as grain.

Carryover of Canadian wheat in all positions at July 31, 1952 was placed at 213.0 million bushels.

International Wheat Agreement sales by Canada, as recorded through August 19, 1952, amounted to 241.6 million bushels, 3.1 million in excess of the revised quota of 238.5 million bushels. Sales were made beyond the July 31 deadline when some importing countries had small quantities of wheat still coming to them at agreement prices. In some cases the quantities involved were less than cargo lots and it was more economical for both importer and exporter to fill the outstanding quotas with larger quantities, accounting in part for sales over and above the guaranteed quantities.

CALENDAR OF WHEAT EVENTS, AUGUST, 1952

- 8 - On the basis of crop conditions at the end of July, the yield of wheat in England and Wales was forecast at 39.9 bushels per acre as compared with a yield of 40.5 bushels in 1951.
- 9 - The Canadian Wheat Board cancelled all previous instructions covering the shipment of Board high grade wheat to Vancouver from Saskatchewan stations. Wheat from all except 36 Saskatchewan stations with a one cent per hundred pounds freight differential in favour of Vancouver is now to be shipped to Fort William-Port Arthur.
- 11 - Total production of all wheat in the United States was estimated at 1,298 million bushels, second only to the 1,359 million harvested in 1947. Winter wheat production was placed at 1,063 million bushels, while the spring wheat outturn was estimated at 236 million.
- 15 - On the basis of conditions at July 31, Canada's 1952 wheat crop was forecast at a record 656 million bushels of which the Prairie Provinces are expected to harvest 632 million.
- 16 - The Canadian Wheat Board announced that, effective August 20, extension of delivery quotas on old crop wheat and oats, as authorized on July 24, would be discontinued at all delivery points in the designated area. Deliveries of wheat and rye are to be restricted to the initial delivery quota of five bushels per seeded acre and deliveries of oats and barley to four bushels per seeded acre. Increased quotas will be authorized at individual points as quickly as circumstances warrant such action.
- 18 - According to Foreign Crops and Markets, the wheat harvest in France is expected to be larger than that of any recent year, with private estimates as high as 320 million bushels. According to a recent announcement by the French government, producers will receive the same basic price for the 1952 wheat crop as they received for the 1951 crop, 3,600 francs per quintal (U.S. \$2.84 per bushel at the current rate of exchange).
- 27 - The Canadian Wheat Board's summary of the number of elevator shipping points in each quota indicated that, out of a total of 2,077 points, 1,970 had a five-bushel quota for wheat, 103 had an eight-bushel quota, and 4(2 each in Ontario and British Columbia) were on an open quota.

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