

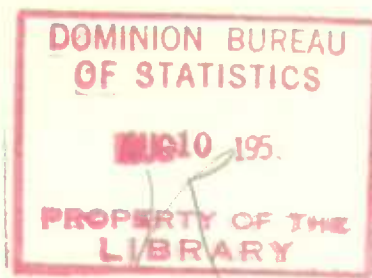
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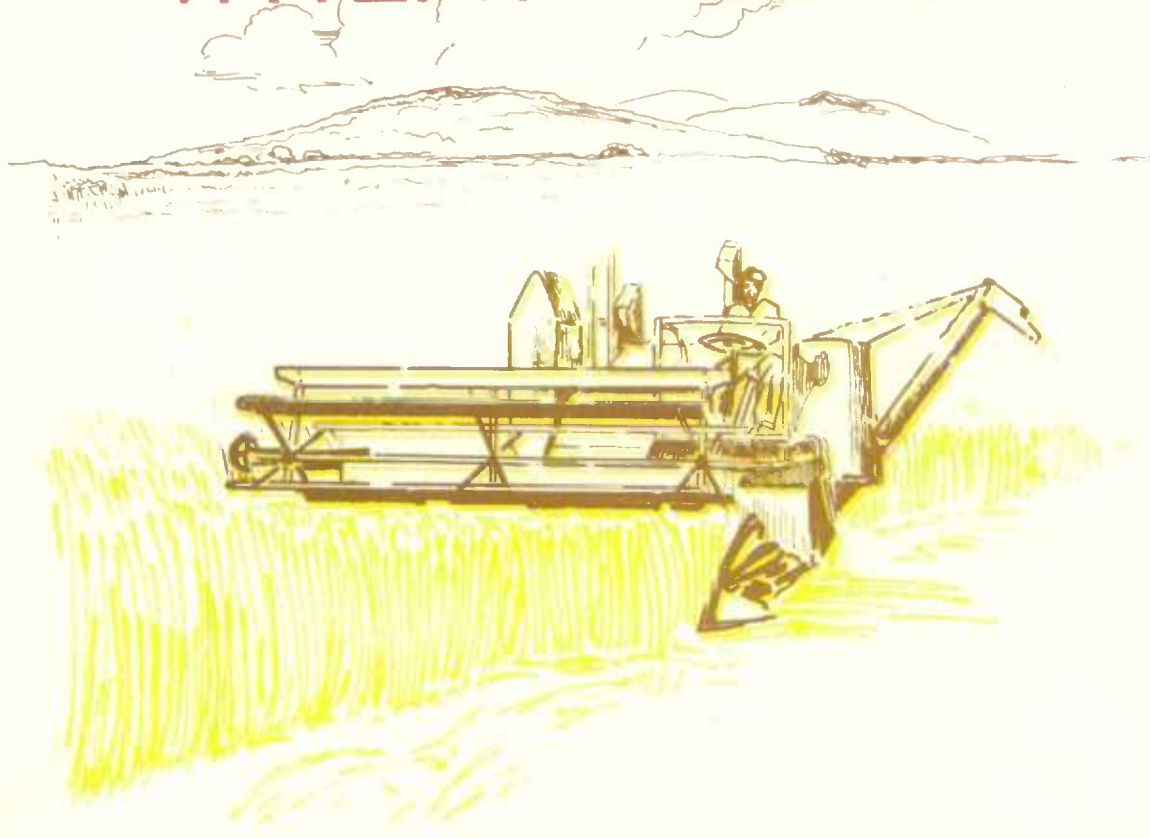


CANADA

DOMINION BUREAU OF STATISTICS
AGRICULTURE DIVISION



THE WHEAT REVIEW



JULY, 1953

DOMINION BUREAU OF STATISTICS
Department of Trade and Commerce

THE
WHEAT REVIEW

JULY, 1953

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WORLD WHEAT SITUATION

Current Supplies Latest available estimates indicate that supplies of wheat remaining on or about July 1, 1953 in the four major exporting countries for export and for carryover at the end of their respective crop years amounted to 1,188.5 million bushels, more than double the 566.8 million available at the same time a year ago. Supplies at July 1, 1953 (in millions of bushels) were held as follows, with last year's figures in brackets: United States, 578.5 (254.4); Canada, 404.6 (260.1); Argentina, 134.2 (1.8), and Australia, 71.2 (50.5). Estimates for both years include on-farm stocks as well as those in commercial positions.

New Crops Based on conditions at July 1, the United States wheat crop is officially forecast at 1,175 million bushels, some 9 per cent smaller than the 1952 crop of 1,291 million but nearly 8 per cent larger than the ten-year average of 1,089 million. The Canadian crop, although late, is making good progress in most regions. The preliminary official acreage estimate placed the 1953 wheat area at 25.5 million acres, down half a million from the 1952 level. The first official estimate of production is scheduled for release on August 14th.

In the Argentine, wheat seeding is approaching completion under good conditions. A significant increase in acreage is anticipated. Apart from large sections of New South Wales and Queensland, where weather was extremely dry at mid-July, early seasonal conditions have been favourable to new seedings in Australia. Estimates of seeded acreages should be available for the Commonwealth next month.

Trade reports at the end of July indicated that weather conditions in Europe were mostly favourable for maturing and harvesting grains. However, harvest may be late in a number of countries as recurring rains have retarded ripening. Despite this, satisfactory yields are anticipated in most areas. Optimistic reports have also been noted concerning wheat crop prospects in Turkey and in the Soviet Union.

International Wheat Agreement to be Renewed The International Wheat Council issued the following press release on July 17, 1953:

"The International Wheat Council met today in London in its first Session under the 1953 International Wheat Agreement. The Council will meet again on Monday 20th July to continue its Session.

It was determined by the Council that 30 importing countries and 2 exporting countries holding sufficient percentages of the guaranteed purchases and guaranteed sales to bring the new Agreement into force had deposited their instruments of acceptance of the Agreement by 15th July or had given notice of their intention to do so by 1st August. The countries which have accepted the Agreement or have given notice of their intention to do so are as follows:

Importing Countries: Austria, Belgium, Bolivia, Ceylon, Costa Rica, Cuba, Denmark, Dominican Republic, Egypt, El Salvador, Germany, Greece, Guatemala, Haiti, Iceland, India, Indonesia, Ireland, Israel, Japan, Netherlands, New Zealand, Nicaragua, Norway, Peru, Philippines, Portugal, Spain, Switzerland, Union of South Africa.

Exporting Countries: Canada and the United States.

Ten signatory importing countries, namely Brazil, Ecuador, Honduras Republic, Italy, Lebanon, Liberia, Mexico, Panama, Saudi Arabia and Venezuela and

two exporting countries, Australia and France, were unable to complete their constitutional procedures for acceptance of the Agreement by 15th July and will be granted extensions of time in which to deposit their instruments of acceptance. (Note: Sweden was added to this list later.)

The Council approved applications for increases in guaranteed purchases in the amounts shown for the importing countries listed below:

	<u>Increase Approved</u> <u>Metric Tons</u>	<u>New Guaranteed</u> <u>Purchases</u>
Belgium	35,000	650,000
Bolivia	15,000	110,000
Ceylon	25,000	280,000
Ecuador	30,000	65,000
Guatemala	10,000	35,000
Haiti	5,000	50,000
Indonesia	28,000	170,000
Israel	10,000	225,000
Peru	15,000	200,000
Portugal	25,000	200,000
Spain	105,000	250,000
Total	303,000	-

Applications for accessions to the 1953 Agreement of the four importing countries listed below were also approved by the Council:

	<u>Guaranteed</u> <u>Purchases</u> <u>Metric Tons</u>
Hashemite Kingdom of the Jordan	80,000
Vatican City State	15,000
Republic of Korea	40,000
Federation Peoples Republic of Yugoslavia	100,000
Total	235,000

The apportionment among the exporting countries of the total guaranteed purchases subscribed by the importing countries is now under discussion."

Note:- One metric ton = 36.7437 bushels.

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

Importing Countries	Guaranteed Quantities	Source				Total Purchases	Remainder
		Canada 1/	Australia 2/	France 2/	U.S.A. 2/		
- thousand bushels -							
Austria	11,023	2,506	-	-	8,330	10,836	187
Belgium	20,209	13,719	-	-	6,469	20,188	21
Bolivia 3/	2,756	2,436	-	-	366	2,802	-
Brazil	13,228	2,546	-	-	9,340	11,886	1,342
Ceylon 3/	6,614	-	6,131	-	483	6,614	-
Costa Rica	1,213	457	-	-	746	1,203	10
Cuba	7,422	1,720	-	-	5,635	7,355	67
Denmark 3/	1,617	812	-	-	809	1,621	-
Dominican Republic	876	211	-	-	659	870	6
Ecuador	1,286	599	-	-	675	1,274	12
Egypt 3/	14,697	7,330	-	-	7,514	14,844	-
El Salvador 3/	404	115	-	-	288	403	-
Germany 3/	66,139	12,551	3,204	3,013	47,464	66,232	-
Greece	15,726	14	-	-	12,820	12,834	2,892
Guatemala 3/	919	282	-	-	641	923	-
Haiti 3/	1,029	110	-	-	920	1,030	-
Honduras Republic 3/ ..	367	68	-	-	303	371	-
Iceland	404	47	-	-	288	335	69
India 3/	55,116	13,067	18,992	-	23,206	55,265	-
Indonesia	3,674	54	2,360	-	1,109	3,523	151
Ireland 3/	10,104	6,346	2,653	-	1,166	10,165	-
Israel 3/	5,879	2,163	-	-	3,731	5,894	-
Italy	40,418	11,328	2,798	-	19,151	33,277	7,141
Japan 3/	18,372	3,725	2,519	-	12,291	18,535	-
Lebanon	2,388	372	-	-	1,938	2,310	78
Liberia 3/	37	19	-	-	17	36	-
Mexico	12,860	-	-	-	9,312	9,312	3,548
Netherlands	24,802	7,960	1,928	367	14,494	24,749	53
New Zealand	4,593	-	4,592	-	-	4,592	1
Nicaragua	331	148	-	-	181	329	2
Norway 3/	7,716	3,023	621	-	4,112	7,756	-
Panama 4/	625	484	-	-	107	591	34
Peru 3/	5,512	2,344	-	-	3,278	5,622	-
Philippines 3/	7,202	3,925	1	-	3,278	7,204	-
Portugal 3/.....	5,626	714	18	-	4,883	5,615	-
Saudi Arabia	1,837	15	103	-	1,672	1,790	47
Spain 3/	4,373	-	-	-	4,444	4,444	-
Sweden 3/	2,756	-	1,092	-	1,659	2,751	-
Switzerland	6,430	4,601	-	-	1,761	6,362	68
Union of South Africa .	11,023	7,989	-	-	2,725	10,714	309
United Kingdom	177,068	112,295	39,822	-	24,709	176,826	242
Venezuela	6,246	3,245	-	-	2,710	5,955	291
Totals	580,917	229,340	86,834	3,380	245,684	565,238	
Guaranteed Quantities (Exporting Countries) .		235,000	88,700	4,089	253,128	580,917	
Balance	5,660	1,866	709	7,444	15,679		

1/ Canadian sales through July 21, 1953.

2/ Sales recorded by International Wheat Council through July 17, 1953.

3/ Quota filled.

4/ Sales may not be made until further notice.

CANADIAN SITUATION

Supply Position Deliveries of wheat to Western country elevators have been coming forward in relatively heavy volume during the last few weeks. Marketings during the week ending July 16, at 12.9 million bushels were the highest for any week since October 16, 1952. Total marketings of wheat by farmers in Western Canada from the beginning of the current crop year to July 16 amounted to 465.6 million bushels, 8 per cent greater than the 430.6 million marketed in the comparable period of the preceding crop year. Stocks in country elevators at 109.6 million bushels were greater than those at approximately the same date in 1952 and 1951 by 11.8 and 34.6 million bushels, respectively. Stocks in interior terminals also exceeded by wide margins those at approximately the same date in either of the two preceding crop years. The amount of grain in rail transit in the Western Division on July 16 at 16.4 million bushels was also well above the comparable figures of 11.6 million in 1952 and 10.3 million in 1951. Despite the fact that Lake shipments of Canadian wheat have continued to move in extremely heavy volume, Lakehead stocks were almost three times as large as those of a year ago. Stocks in Bay, Lake and Upper St. Lawrence ports, although somewhat below those at approximately the same date last year were more than double the comparable figure of 1951. July 16 stocks in Lower St. Lawrence and Maritime ports were more than twice as great as the comparable 1952 figures and almost three times greater than those of 1951. Total visible supplies at July 16, 1953 were 237.8 million exceeding by some 47.0 million bushels the comparable figure a year ago.

Canadian Wheat Supplies

Item	1951-52 <u>1/</u>	1952-53 <u>2/</u>
- million bushels -		
Carryover in North America at beginning of crop year (August 1)	189.2	217.2
New crop	552.7	687.9
Imports of wheat, August—May	<u>3/</u>	<u>3/</u>
Total estimated supplies	741.9	905.1
Less estimated domestic requirements for crop year ...	168.9	160.0
Available for export and carryover	573.0	745.1
Deduct:		
Overseas clearances of wheat as grain, August—June .	231.6	266.0
Exports of Canadian wheat to U.S., August—June	<u>34.9</u>	<u>22.8</u>
Total exports of wheat	266.4	288.8
Exports of wheat flour in terms of wheat, August—June	<u>46.5 <u>4/</u></u>	<u>51.7</u>
Total exports of wheat and wheat flour	312.9	340.5
Balance on July 1 for export and carryover	260.1	404.6

1/ Subject to revision. 2/ Preliminary. 3/ Less than 50,000 bushels.
4/ Adjusted for time lag in returns made by Customs.

Exports Combined exports of both wheat as grain and wheat flour in terms of wheat during June 1953 amounted to 44.9 million bushels, a slight decrease from the previous month. Exports of wheat as grain at 39.0 million bushels showed a decline from the 41.7 million bushels exported in May 1953, but exceeded by a narrow margin the 38.3 million bushels exported in the same month a year ago. Total exports of wheat as grain for the first eleven months of the current crop year amounted to 288.8 million bushels, some 8.4 per cent greater than the 266.4 million exported during the same period of 1951-52. Some 84.2 million bushels, representing 29 per cent of this year's August-June exports of wheat went to the United Kingdom. Other markets taking over 5 million bushels of Canadian wheat during the period, with quantities in millions of bushels, were as follows: The United States, 22.8 (of which 5.8 million were for milling in bond); Germany, 22.6; Belgium, 19.3; Pakistan, 13.9; Netherlands, 13.1; India, 13.1; Japan, 11.7; Brazil, 11.1; Yugoslavia, 10.2; Italy, 9.8; Switzerland, 9.5; Egypt, 7.1; Ireland, 6.2; Norway, 5.7; and Peru, 5.2.

Preliminary Customs returns indicate that exports of wheat flour in terms of wheat during June, amounted to 5.9 million bushels, somewhat higher than the previous month's total of 4.8 million but lower than the June 1952 total of 6.1 million bushels. Total exports of wheat flour in terms of wheat equivalent for the August-June period of the current crop year at 51.7 million exceeded by 11 per cent the adjusted figure of 46.5 million bushels exported during the first eleven months of 1951-52. Total exports of wheat as grain and flour in terms of wheat, for the first eleven months of the current crop year, at 340.5 million bushels, exceeded by about 9 per cent the total of 312.9 million bushels exported during the comparable period of 1951-52. The balance remaining on July 1 for export and carryover was estimated at 404.6 million, some 144.5 million greater than the 260.1 million available on the same date a year ago.

Delivery Quota Policy 1953-1954 On July 15 the Canadian Wheat Board advised the Trade that important changes in the Board's delivery quota policy would become effective on August 1, 1953. These changes were summarized as follows:

"During the coming crop year Durum grades of wheat and flaxseed will be on an open quota basis. Delivery quotas will apply on wheat (other than Durums), and on oats, barley and rye. Producers' deliveries of these grains will be based upon a single "specified acreage" figure and apart from such exceptions as may be necessary from time to time, producers may deliver any of the above grains or any combination of these grains within the limits of the delivery quota provided. The "specified acreage" figure, advice of which elevator agents will receive from the Board for insertion on the inside of the front cover page of each producer's permit book, will include the producer's acreage seeded to wheat (other than Durums), and to oats, barley and rye, plus the producer's summerfallow acreage. As a measure of assistance in grain deliveries from smaller farm units, initial delivery quotas will provide for a minimum delivery of 500 bushels of grain; otherwise the initial delivery quota as announced by the Board on or before August 1, 1953 and all subsequent quotas will apply to each producer's "specified acreage".

Since deliveries will be controlled through one acreage figure, namely, the "specified acreage", it follows that, in general, producers will have the option of delivering wheat, oats, barley or rye as delivery quotas are established, or any combination of these grains, up to the maximum bushelage permitted by the Board's delivery quota and producers' "specified acreage".

In order to enable the Board to fill market requirements for particular kinds of grain or grades of grain, the Board may at various times, authorize delivery of such grain over the existing quota. Conversely, if deliveries of any particular kind or grade of grain are creating congestion, the Board may temporarily prohibit deliveries of such grain."

On July 28 and 29 further details of delivery quota policy, as effective August 1, were released:

(a) Wheat, Other Than Durum and Oats.-- Deliveries of these two grains may be continued up to August 15 outside the quota and at all stations now authorized or which may be subsequently authorized to accept such deliveries and regardless of the producer's designated delivery station. On and after August 17, 1953 all deliveries of wheat, other than Durum, and of oats will apply against the initial delivery quota for season 1953-54.

(b) Barley and Rye.-- Effective August 1, 1953, all deliveries of barley and rye will apply against the initial delivery quota for the 1953-54 season.

(c) Durum Wheat and Flaxseed.-- As previously indicated these grains are not subject to quota control during 1953-54.

(d) Initial Delivery Quota.-- The initial delivery quota at all stations for the crop year 1953-54 is three bushels per "specified acre" or a minimum of 500 bushels, whichever is greater. The total deliveries of barley and rye from August 1, 1953, along with deliveries of wheat, other than Durum, and deliveries of oats on and after August 17, 1953 must not exceed the quota of three bushels per specified acre, subject to the minimum of 500 bushels, while the initial quota remains in effect at the station.

Alternate Delivery Privileges Effective August 1, 1953, the alternative delivery privilege in effect at all stations is cancelled, with the exception that deliveries of wheat, other than Durum, and of oats may be made at any station during the period August 1-15, 1953.

Initial Payments for 1953-54 On July 21 the Canadian Wheat Board announced that initial payments effective for the crop year commencing August 1, 1953 would be as follows:

Wheat.-- \$1.40 per bushel basis No. 1 Northern Wheat in store Fort William-Port Arthur or Vancouver. In establishing grade spreads for 1953-54 the Board will provide that a premium will be paid on top grades of Durum Wheat.

Oats.-- 65 cents per bushel basis No. 2 C.W. Oats in store Fort William-Port Arthur.

Barley.-- 96 cents per bushel basis No. 3 C.W. Six-Row Barley in store Fort William-Port Arthur.

Provision Made Re Additional Deliveries Over the 18 Bushel Level The following statement was contained in the Canadian Wheat Board's Instructions to the Trade, No. 59 of July 21:

"It is the policy of the Board to give producers the opportunity of delivering as much grain as possible prior to the close of the present crop year on July 31st, 1953, and to this end provision has been made for elevator agents to apply for permission to accept additional deliveries of wheat, oats and barley as soon as they can give assurance that space is available to take all grain offered by producers on the basis of the 15-bushel per seeded acre basic quota and the 3-bushel per seeded acre supplementary quota. At the present time elevator agents at most delivery points in the three Prairie Provinces have been authorized to accept additional deliveries and the Board will continue to authorize additional deliveries at remaining stations as surplus elevator space becomes available. It is hoped through this policy to have country elevator space utilized to the greatest possible extent by the close of business on July 31st."

Canadian Wheat
Acres Below
1952 Level

Canada's total wheat acreage in 1953 is placed at 25.5 million bushels as compared with 26.0 million in 1952. As in past years, the 1953 acreage estimates are based, with certain exceptions, on returns from the Bureau's annual June 1 survey of acreages of field crops. This year, due to abnormal weather conditions in the Prairie Provinces delaying seeding and causing changes in acreage plans after June 1, the Bureau conducted a special acreage survey of the principal grain crops and summerfallow in these provinces at the end of June. Preliminary results from this special supplementary survey have been incorporated in the current estimates. Any changes indicated by additional returns from the special acreage survey will be included in future crop reports. The acreage estimates for 1953, particularly in the Prairie Provinces, must be considered as preliminary only, subject not only to changes already mentioned but in these as well as in other provinces to revisions in the light of marketing and other check data which may become available later.

Preliminary Estimates of Crop and Summerfallow Acreages,
Canada and Prairie Provinces, 1953

Province and Crop	1952 Area	Per Cent of 1952	1953 Area
	acres	p.c.	acres
<u>CANADA</u>			
Winter wheat	650,000	113	732,000
Spring wheat 1/	25,345,000	98	24,780,600
All wheat	25,995,000	98	25,512,600
Oats for grain	11,062,400	89	9,830,000
Barley	8,477,400	105	8,911,100
Fall rye 2/	757,700	132	1,001,200
Spring rye	499,600	93	462,200
All rye	1,257,300	116	1,463,400
Flaxseed	1,206,500	86	1,036,000
Summerfallow 3/	21,245,000	107	22,764,000
<u>MANITOBA</u>			
Spring wheat	2,368,000	93	2,208,000
Oats for grain	1,611,000	88	1,412,000
Barley	2,165,000	109	2,365,000
Fall rye	44,100	204	90,000
Spring rye	10,600	134	14,200
All rye	54,700	190	104,200
Flaxseed	593,000	84	500,000
Summerfallow	2,669,000	107	2,845,000
<u>SASKATCHEWAN</u>			
Spring wheat	16,432,000	98	16,100,000
Oats for grain	3,362,000	81	2,721,000
Barley	2,644,000	104	2,745,000
Fall rye	379,000	132	500,000
Spring rye	363,000	87	316,000
All rye	742,000	110	816,000
Flaxseed	380,000	90	342,000
Summerfallow	12,430,000	109	13,544,000
<u>ALBERTA</u>			
Spring wheat	6,404,000	99	6,340,000
Oats for grain	2,587,000	91	2,357,000
Barley	3,336,000	105	3,489,000
Fall rye	254,000	129	328,000
Spring rye	126,000	105	132,000
All rye	380,000	121	460,000
Flaxseed	151,000	98	148,000
Summerfallow	6,146,000	104	6,375,000

1/ Includes relatively small acreages of winter wheat in all provinces other than Ontario. 2/ Includes small acreages of spring rye in Quebec, Ontario and British Columbia. 3/ Prairie Provinces only.

Farmers' Marketings of Wheat in the Prairie Provinces, 1952-53

Week ending		Manitoba	Saskatchewan	Alberta	Total	Last Year
- bushels -						
August	7, 1952	204,790	1,154,774	1,579,863	2,939,427	2,018,886
	14	236,286	600,836	311,610	1,148,732	829,250
	21	1,814,726	1,015,243	435,602	3,265,571	851,986
	28	4,057,987	8,725,185	2,110,058	14,893,230	1,318,203
September	4	1,516,658	10,508,053	2,238,480	14,263,191	805,779
	11	1,382,648	9,691,272	3,199,088	14,273,008	4,239,842
	18	1,604,993	7,466,642	3,424,495	12,496,130	13,846,465
	25	1,888,528	7,633,260	4,582,277	14,104,065	20,099,662
October	2	2,007,184	15,352,866	7,653,604	25,013,654	8,345,797
	9	1,125,450	11,640,224	6,890,852	19,656,526	16,904,874
	16	882,818	7,868,908	4,578,098	13,329,824	43,769,593
	23	916,507	7,180,359	3,662,333	11,759,199	27,526,509
	30	917,626	5,150,812	2,563,512	8,631,950	13,773,440
November	6	2,318,994	6,420,954	2,935,288	11,675,236	9,465,279
	13	1,905,372	7,571,378	2,969,211	12,445,961	7,645,329
	20	1,829,784	7,621,546	2,858,916	12,310,246	8,024,765
	27	1,542,787	8,128,934	2,773,031	12,444,752	8,167,976
December	4	1,071,012	6,433,981	2,435,503	9,940,496	10,343,181
	11	1,012,732	7,353,877	2,633,921	11,000,530	10,603,977
	18	1,005,219	7,315,274	2,673,219	10,993,712	6,950,882
	23	164,834	4,772,645	850,954	5,788,433	6,405,705
	30	613,133	4,513,146	3,046,483	8,172,762	5,333,677
January	8, 1953	300,981	6,204,482	3,019,209	9,524,672	8,472,260
	15	203,139	5,342,144	1,622,507	7,167,790	7,365,497
	22	138,245	5,114,767	3,416,473	8,669,485	3,237,709
	29	178,574	6,651,710	3,682,523	10,512,807	2,995,225
February	5	141,927	3,898,839	2,802,089	6,842,855	6,209,169
	12	133,253	4,083,520	4,199,324	8,416,097	5,227,821
	19	173,694	3,209,800	2,822,378	6,205,872	5,546,923
	26	115,965	3,392,568	1,650,577	5,159,110	4,473,456
March	5	71,803	3,004,757	1,247,568	4,324,128	5,986,720
	12	120,900	8,149,505	1,342,009	9,612,414	5,835,038
	19	176,091	7,543,296	1,584,003	9,303,390	4,683,505
	26	134,462	4,034,422	1,224,020	5,392,904	4,462,515
April	2	238,215	1,759,555	692,324	2,690,094	3,568,659
	9	203,728	2,181,258	464,861	2,849,847	1,408,871
	16	364,469	4,424,469	882,646	5,671,584	1,991,542
	23	392,063	5,726,538	1,863,961	7,982,562	9,820,790
	30	472,141	4,556,222	1,635,469	6,663,832	19,764,613
May	7	1,156,585	5,686,475	1,381,901	8,224,961	14,519,316
	14	988,657	9,240,412	2,322,899	12,551,968	10,220,013
	21	666,972	4,275,822	1,765,979	6,708,773	12,749,193
	28	476,754	4,737,872	1,761,564	6,976,190	12,441,646
June	4	283,074	5,512,806	2,122,286	7,918,166	9,655,474
	11	207,920	5,784,749	1,678,671	7,671,340	9,615,772
	18	394,936	8,267,097	2,695,422	11,357,455	5,909,283
	25	533,821	6,294,489	1,896,630	8,724,940	7,815,362
July	2	418,655	4,037,559	1,068,135	5,524,349	7,325,536
	9	856,019	6,099,470	2,552,334	9,507,823	6,110,615
	16	1,233,381	7,897,865	3,739,938	12,871,184	5,969,872
Totals		40,796,492	301,232,637	123,544,098	465,573,227	430,653,452

Visible Supply of Canadian Wheat, July 16, 1953, Compared with
Approximately the same Date, 1951 and 1952

Position	1951	1952	1953
- thousand bushels -			
Country elevators - Manitoba	3,033	4,019	6,537
Saskatchewan	50,910	59,236	59,845
Alberta	21,072	34,569	43,220
Totals	75,015	97,823	109,602
Interior private and mill	3,812	4,703	5,712
Interior terminals	9,780	5,515	14,640
Vancouver-New Westminster	3,572	7,313	8,719
Victoria	-	-	24
Prince Rupert	-	6	452
Churchill	2,317	2,429	2,094
Fort William-Port Arthur	30,306	9,615	27,638
In transit rail (Western Division)	10,346	11,596	16,419
Bay, Lake and Upper St. Lawrence ports ..	12,826	30,758	28,624
Lower St. Lawrence and Maritime ports ...	4,626	6,162	12,549
In transit lake	5,042	7,356	6,504
In transit rail (Eastern Division)	1,806	3,291	3,921
United States ports	965	4,241	665
In transit U.S.A.	459	-	251
Totals	160,874	190,809	237,813

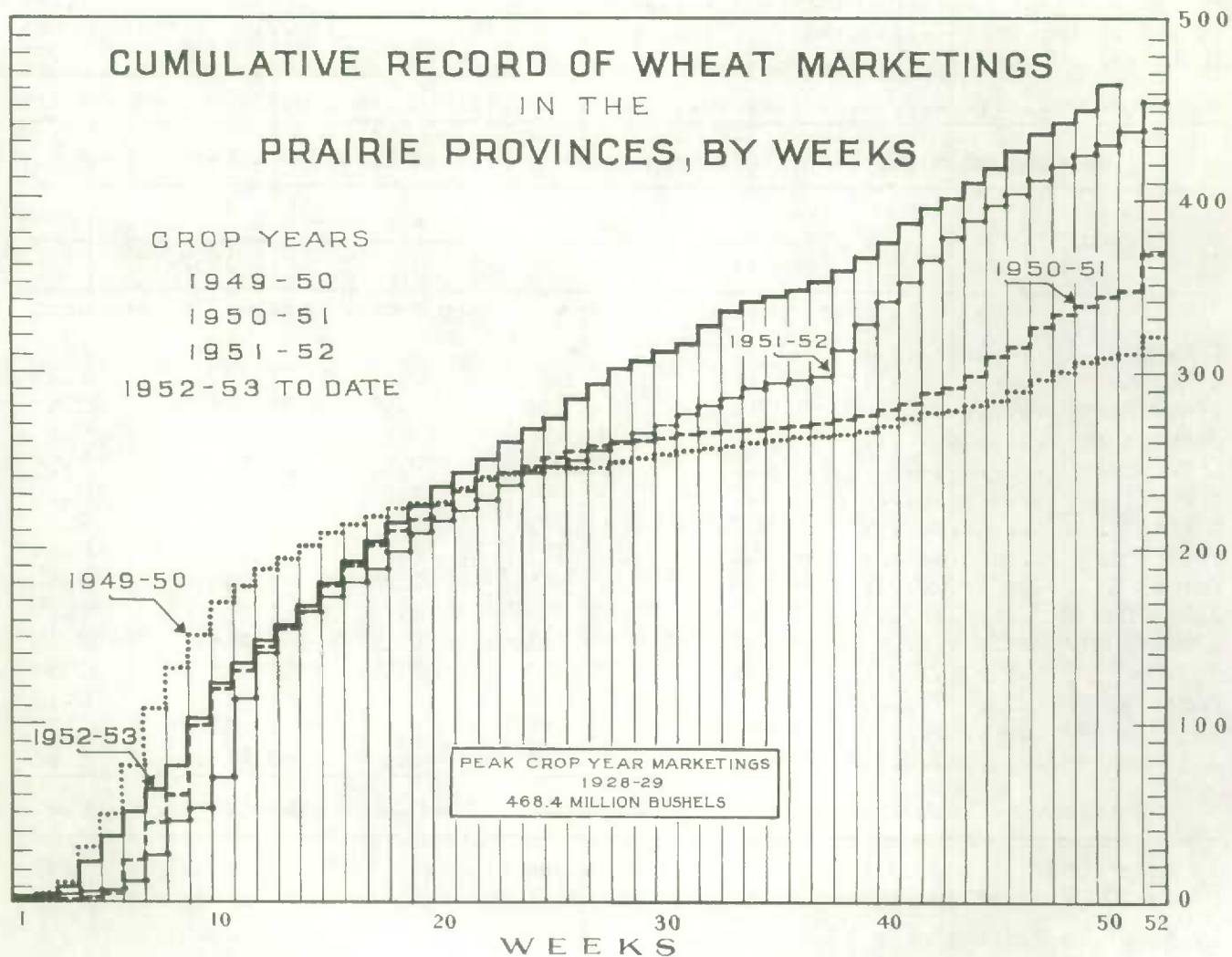
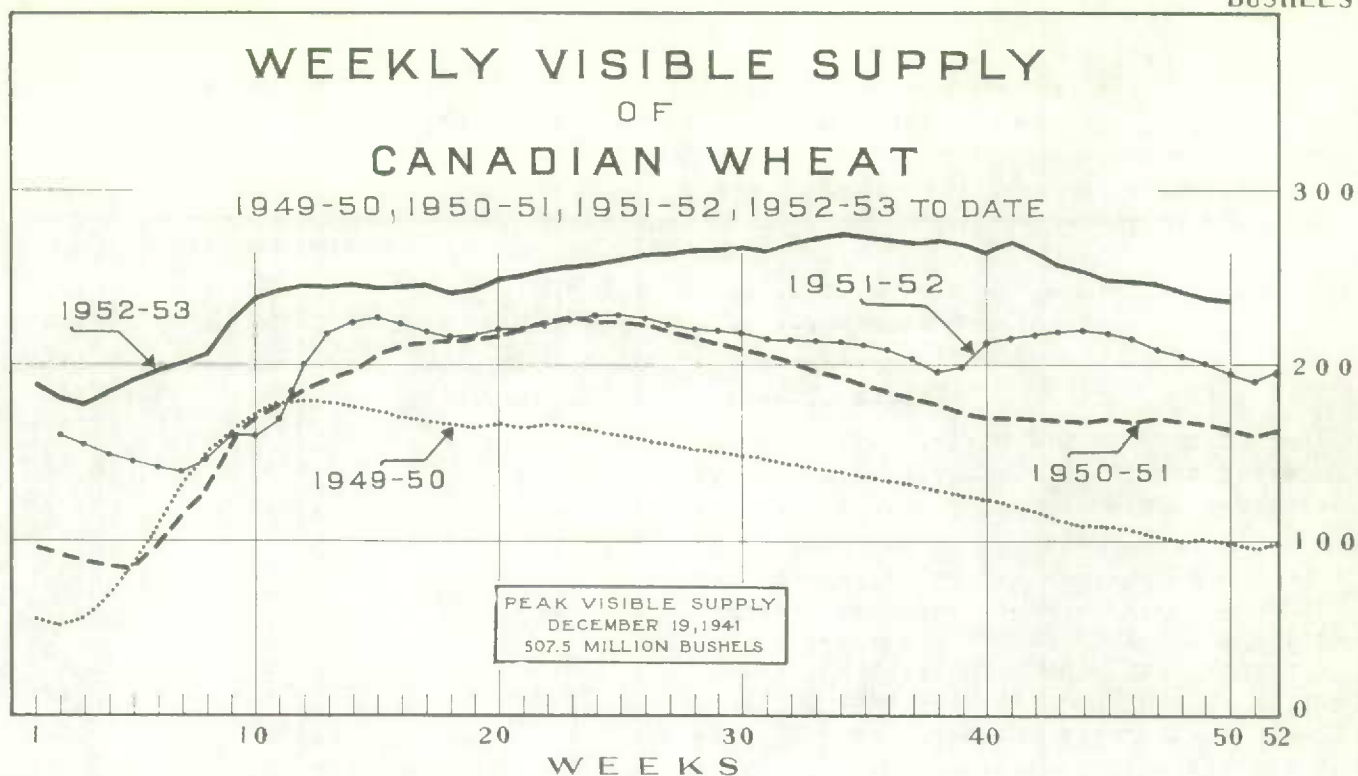
Grading of Wheat Inspected, August-June 1952-53 with Comparison

Grade	Average 1946-47- 1950-51 per cent	August-June			
		1951-52		1952-53	
		cars	per cent	cars	per cent
1 Hard	1/	-	-	49	1/
1 Northern	14.8	881	0.4	17,837	7.2
2 Northern	37.6	9,656	4.3	76,098	30.6
3 Northern	13.0	34,947	15.6	43,243	17.4
4 Northern	4.4	23,297	10.4	24,130	9.7
5 Wheat	3.7	20,589	9.2	25,968	10.5
6 Wheat	2.2	11,427	5.1	7,267	2.9
Feed Wheat	0.4	1,573	0.7	1,176	0.5
Garnet	0.9	551	0.2	1,286	0.5
Amber Durum	3.5	2,876	1.3	4,257	1.7
Alberta Winter	0.7	281	0.1	246	0.1
Toughs 2/ 3/	15.6	82,817	37.0	42,931	17.3
Damps 2/ 4/	1.3	33,110	14.8	365	0.1
Rejected 2/	-	1,115	0.5	2,464	1.0
All Others	1.9	806	0.4	1,049	0.4
Totals	100.0	223,926	100.0	248,366	100.0

1/ Less than .05 per cent. 2/ All varieties and grades. 3/ Moisture content 14.9 to 17 per cent for durum, 14.6 to 17 per cent for all other varieties.

4/ Moisture content over 17 per cent.

MILLION
BUSHELS



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

Lake Shipments of Canadian Grain from the Opening of Navigation to July 16, 1953
and to Approximately the Same Date, 1943 to 1952*

Year	Wheat	Oats	Barley	Rye	Flaxseed	Total
- thousand bushels -						
1943	83,374	15,870	19,285	1,259	1,475	121,263
1944	123,639	30,145	18,306	4,987	3,603	180,681
1945	139,883	44,620	19,327	2,494	1,874	208,199
1946	41,568	26,177	8,614	676	651	77,686
1947	66,069	19,626	8,392	634	28	95,749
1948	40,411	8,339	6,965	302	2,968	58,984
1949	67,955	10,029	11,088	5,814	4,307	99,193
1950	69,672	7,795	9,546	2,772	456	90,242
1951	70,901	24,238	15,943	4,340	654	116,076
1952 <u>1/</u> ...	119,232	45,804	39,305	4,332	2,384	211,058
1953	123,119	34,480	49,370	5,661	2,408	215,038

*Shipments from opening of navigation to July 14, 1943 through 1947. Since 1948, shipments are to the Thursday nearest July 16. 1/ Revised.

Total shipments of the five major grains from the Lakehead terminals from the opening of navigation to July 16, amounted to 215.0 million bushels, somewhat higher than those of any comparable period in recent years. Wheat shipments, at 123.1 million bushels, accounted for more than 57 per cent of the total, while shipments of barley and oats at 49.4 million and 34.5 million bushels, respectively, made up most of the remainder. Shipments of rye at 5.7 million bushels and flaxseed at 2.4 million were both slightly above those of the comparable period of 1951-52.

Crop Condition Spring wheat condition figures, based on an analysis of weather at June 30 factors and expressed in terms of the long-time provincial wheat yields, were well above average in all three Prairie Provinces.

Manitoba, with a wheat condition figure of 112, registered a substantial increase over the rating of 95 at June 30 in both 1952 and 1951. Saskatchewan's rating, at 125, was 5 points below last year's level but well above the 1951 figure of 106. In Alberta, the wheat condition figure was placed at 120, down slightly from the 1952 and 1951 levels of 125 and 123, respectively.

The charts of condition of spring wheat in the Prairie Provinces by crop districts formerly published in the July issue of this publication have been omitted. The extreme variation in plant development resulting from abnormally high rainfall and other weather factors has precluded the determination this year of reliable condition figures on a crop-district basis and the charts ordinarily showing these ratings, therefore, have not been prepared.

For all Canada, the condition of field crops at June 30, 1953, expressed in percentage of average, was reported as follows, with the figures for June 30, 1952 within brackets: Winter wheat 104 (91); spring wheat 122 (125); oats for grain 93 (95); barley 92 (98); fall rye 103 (94); spring rye 94 (101); mixed grains 90 (87); flaxseed 93 (90); potatoes 94 (92); tame hay 96 (96) and pasture 102 (97).

Wheat Shipments* to the United States by Destination
August 1, 1952 to July 16, 1953
Compared with Approximately the Same Period 1950-51 and 1951-52

Destination	1950-51	1951-52	1952-53
<u>By Vessel</u>		- bushels -	
Duluth-Superior	3,178,471	6,075,393	2,643,223
Milwaukee	140,673	353,016	-
Chicago	605,693	1,378,340	383,222
Toledo	108,483	-	-
Detroit	346,050	62,930	-
Huron	-	79,148	320,734
Erie	212,606	93,107	276,567
Buffalo	13,406,841	23,757,678	15,238,554
Oswego	597,997	514,005	2,727,480
Totals, Vessel	18,596,814	32,313,617	21,589,780
<u>By Rail</u>			
U.S.A. Seaboard Ports	400,720	1,903,416	648,480
Other U.S.A. Points	3,559,669	5,909,130	4,549,686
Totals, Rail	3,960,389	7,812,546	5,198,166
Totals, Shipments	22,557,203	40,126,163	26,787,946

*Either for re-export or retention for domestic use.

Total shipments of Canadian wheat to the United States, either for re-export or domestic use from the beginning of the current crop year to July 16 amounted to 26.8 million bushels. This quantity, although some 33 per cent below the 40.1 million bushels shipped during the comparable period of 1951-52, is some 19 per cent greater than the 1950-51 movement of 22.6 million bushels for the corresponding period.

Rail shipments of wheat to Maritime ports from Bay, Lake and Upper St. Lawrence ports totalled 15.3 million bushels during the August-June period of the current crop year, 56 per cent greater than the 9.8 million shipped during the same period of 1951-52.

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

Ports	August 1, 1951 to June 30, 1952	August 1, 1952 to June 30, 1953
- bushels -		
Collingwood	301,000	851,463
Midland	4,106,376	6,488,752
Owen Sound	1,426,039	1,091,355
Port McNicoll	3,528,654	5,474,960
Goderich	123,745	99,760
Sarnia	287,788	630,857
Walkerville	1,786	-
Humberstone	-	30,000
Toronto	5,672	567,557
Prescott	1,500	32,298
Totals	9,782,560	15,267,002

Rail Shipments of Wheat from Fort William-Port Arthur, 1949-50—1952-53

Month	1949-50	1950-51	1951-52	1952-53
- bushels -				
August	158,893	122,532	283,914	191,711
September	131,711	123,256	435,068	1,181,046
October	122,482	73,543	159,667	936,757
November	92,334	133,847	465,193	651,957
December	342,946	1,517,624	1,387,828	464,914
January	277,502	4,394,047	5,839,567	6,550,958
February	240,087	3,303,248	3,618,007	9,566,151
March	423,774	3,476,161	1,564,586	6,285,944
April	2,305,727	1,196,236	107,061	189,339
May	124,533	462,676	132,496	216,046
June	96,626	356,443	196,083	136,014
July	52,122	199,603	113,827	
Totals	4,368,737	15,359,216	14,303,297	

In keeping with the usual seasonal trend rail shipments of wheat from the Lakehead have decreased sharply following the opening of navigation. However, total rail movement of wheat from Fort William-Port Arthur during the first eleven months of the current crop year amounted to 26.4 million bushels, in marked contrast to the 14.2 million and the 15.2 million shipped during the corresponding period of 1951-52 and 1950-51, respectively.

Distribution of the June, 1953 rail shipments of wheat by grade and destination from the Lakehead is shown in the table below. Some 115,000 bushels, representing about 84.3 per cent of the total went to destinations in Quebec and Ontario with the balance going to the Maritimes.

Distribution of Rail Shipments of Wheat from Fort William-Port Arthur
June, 1953

Grade	P.E.I.	N.S.	N.B.	Que.	Ont.
- bushels -					
2 Northern	-	-	-	-	3,000
3 Northern	-	-	-	-	6,000
4 Northern	-	-	-	-	4,000
5 Wheat	-	6,483	-	-	8,000
6 Wheat	-	167	-	1,292	4,167
Amber Durum	1,333	-	7,388	17,158	8,000
Toughs	-	1,500	-	12,378	7,411
All Others	-	3,000	1,440	16,649	26,648
Totals	1,333	11,150	8,828	47,477	67,226

Freight Assistance Shipments Claims filed for payment up to June 30, 1953 represented shipments of 11.8 million bushels of wheat from the Prairie Provinces to Eastern Canada and British Columbia under the freight assistance plan during the first ten months of 1952-53. Shipments during the same period of 1951-52 amounted to 14.4 million bushels. However, the filing of late claims will necessitate upward revisions in August-May shipments of the current crop year, thus narrowing the apparent difference in shipments between the two years.

Provincial Distribution of Freight-Assisted Wheat Shipments,
August-May, 1952-53 and 1951-52

Month	Nfld.	P.E.I.	N.S.	N.B.	Que.	Ont.	B.C.	Total
- thousand bushels -								
August, 1952	11	32	70	63	536	492	245	1,448
September	12	21	68	48	534	474	263	1,419
October	11	12	72	50	519	482	236	1,383
November	5	20	70	39	541	542	187	1,405
December	11	18	71	42	443	538	231	1,354
January, 1953	4	18	83	44	365	425	209	1,147
February	6	13	56	36	294	331	165	901
March	6	14	60	37	319	364	155	956
April	3	18	67	36	281	431	139	975
May	2	13	58	28	298	366	29	794
Totals 1/	73	179	675	422	4,130	4,445	1,858	11,783
Same period 1951-52:								
Preliminary 2/					not available for period			
Revised 1/.....	58	208	705	485	5,264	5,364	2,312	14,397

Preliminary data on millfeeds moving under the freight assistance plan represent shipments of 432,904 tons during the first ten months of the current crop year. Revised figures for the August-May period of 1951-52 show a total of 461,345 tons shipped under the plan. As with wheat, data on freight-assisted millfeed shipments are subject to upward revision as additional claims are filed and total movements for the current period may, therefore, be expected to approach very closely the 1951-52 level.

Provincial Distribution of Freight-Assisted Millfeed Shipments,
August-May, 1951-52 and 1952-53

Province	1951-52		1952-53
	Preliminary 2/	Revised 1/	Preliminary 1/
- tons -			
Newfoundland	not	2,658	2,717
Prince Edward Island .		6,422	6,110
Nova Scotia	available	34,710	32,402
New Brunswick		30,037	28,371
Quebec	for	213,959	206,839
Ontario		129,922	121,663
British Columbia	period	43,637	35,802
Totals		461,345	432,904

1/ Based on claims filed up to June 30, 1953.

2/ Based on claims filed up to June 30, 1952.

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 Milling in Bond 2/	Customs Exports of Canadian Wheat Flour 3/	Total	Customs 4/ Exports of Wheat and Wheat Flour
- thousand bushels -					
<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</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	24,387	30,516
May	35,550	2,725	5,735	44,010	38,138
June	33,770	4,554	6,101	44,425	40,894
July	34,478	3,818	4,639	42,935	44,782
Totals	266,039	38,683	51,103	355,825	358,803
<u>1952-53 5/</u>					
August	26,089	2,559	3,364	32,011	38,946
September	21,208	3,312	4,960	29,480	27,326
October	24,106	2,950	6,277	33,332	35,611
November	34,339	3,677	5,052	43,068	36,052
December	21,777	2,883	5,693	30,354	44,468
January	17,518	1,206	3,718	22,442	23,562
February	13,135	847	2,969	16,951	18,220
March	11,220	915	4,303	16,437	15,466
April	19,019	1,341	4,683	25,043	20,061
May	40,179	1,476	4,790	46,446	35,963
June	37,390	1,617	5,900	44,907	51,752
Totals	265,980	22,782	51,710	340,472	347,428

1/ Compiled by the Statistics Branch, Board of Grain Commissioners for Canada.

2/ 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 1950-51 and 1951-52 revised to remove effect of time lag in the returns made by Customs.

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

5/ Subject to revision.

Exports of Canadian Wheat and Wheat Flour by Destination, 1952-53

Destination	March	June		August—June	
	Wheat Flour 1/2/	Wheat Flour 2/	Wheat 3/	Wheat Flour 2/	Wheat 3/
- bushels -					
<u>COMMONWEALTH COUNTRIES</u>					
United Kingdom	1,697,706	2,641,415	13,138,449	19,771,830	84,177,390
<u>Africa</u>					
Gambia	976	-	-	2,029	-
Gold Coast	64,773	12,294	-	131,522	-
Nigeria	7,583	17,861	-	109,625	-
Sierra Leone	16,447	3,442	-	52,092	-
Union of South Africa	-	-	1,634,739	-	4,258,052
<u>Asia</u>					
Aden	1,800	2,574	-	4,374	-
Ceylon	475,601	-	-	1,462,460	-
Hong Kong	37,080	66,560	-	1,209,614	3,417
India	-	-	2,287,787	243	13,054,298
Malaya and Singapore	29,344	22,185	-	392,553	-
Pakistan	-	-	1,610,466	-	13,858,633
<u>Europe</u>					
Gibraltar	-	-	-	132,615	-
Malta	-	-	-	-	1,471,366
<u>North America</u>					
Bahamas	23,270	13,707	-	217,764	-
Barbados	4,991	28,314	-	305,240	850
Bermuda	10,435	6,516	-	101,623	-
British Honduras	8,676	7,142	-	48,519	-
Jamaica	115,492	117,508	1,150	924,525	1,150
Leeward and Windward Islands	76,189	63,913	-	879,376	-
Trinidad and Tobago	228,960	71,950	-	1,730,695	500
<u>South America</u>					
British Guiana	90,725	58,509	-	835,780	-
Totals, Commonwealth Countries .	2,890,048	3,133,890	18,672,591	28,312,479	116,825,656
<u>FOREIGN COUNTRIES</u>					
<u>Africa</u>					
Azores and Madeira	7,124	-	-	32,760	-
Belgian Congo	37,332	52,421	-	233,051	7,348
Egypt	204,106	70,321	347,200	6,043,995	7,052,793
French Africa	-	-	-	14,585	-
Liberia	1,400	459	-	8,622	-
Libya	-	-	-	-	660,800
Morocco	8,721	14,990	-	553,235	-
Portuguese Africa	-	-	-	16,308	204,400
Spanish Africa	-	-	-	7,578	-
<u>Asia</u>					
Arabia	7,997	17,100	-	143,739	53,886
Formosa (Taiwan)	-	-	-	6,998	59,583
Indonesia	-	2,295	-	82,413	-
Israel	-	513	224,000	12,447	2,386,892
Japan	150,840	153,711	3,072,546	946,962	11,700,967
Korea	-	937,580	-	937,580	-
Lebanon	292,334	302,990	185,433	3,272,711	2,198,500
Philippine Islands	411,363	532,427	-	4,848,395	-
Portuguese Asia	9,945	-	-	83,057	-
Syria	-	-	-	49	-
Thailand	12,123	19,084	-	269,329	-

Exports of Canadian Wheat and Wheat Flour by Destination, 1952-53

Destination	March	June		August—June	
	Wheat Flour 1/2/	Wheat Flour 2/	Wheat 3/	Wheat Flour 2/	Wheat 3/
- bushels -					
<u>FOREIGN COUNTRIES</u>					
<u>Europe</u>					
Belgium	-	-	2,255,359	-	19,317,727
Denmark	-	225	246,624	675	2,267,018
France	-	-	-	-	1,287,165
Germany, Federal Republic of	106,637	-	2,848,252	233,001	22,642,353
Greece	8,042	3,037	-	16,821	698,163
Iceland	15,264	1,377	-	51,970	-
Ireland	-	-	610,400	-	6,230,466
Italy	7,803	10,485	1,933,252	67,819	9,796,000
Netherlands	-	-	3,169,034	-	13,143,750
Norway	-	-	740,312	-	5,701,109
Portugal	1,642	6,885	-	52,496	996,000
Spain	-	-	727,062	-	727,062
Sweden	-	-	-	-	734,084
Switzerland	-	-	907,000	-	9,515,713
Yugoslavia	9,981	9,067	-	54,283	10,202,846
<u>North America</u>					
Alaska	-	4	-	13	-
Costa Rica	25,474	17,100	18,850	352,409	68,850
Cuba	3,672	6,075	369,600	89,631	1,263,923
Dominican Republic	15,367	15,755	-	99,122	-
El Salvador	18,914	8,271	-	227,277	-
French West Indies	914	-	-	6,237	-
Guatemala	16,344	32,553	-	209,858	-
Haiti	18,004	10,764	-	209,741	-
Honduras	459	-	-	1,836	6,667
Mexico	-	-	-	229	-
Netherlands Antilles	12,726	13,689	-	146,160	-
Nicaragua	25,600	1,026	-	158,440	-
Panama	27,432	34,443	-	279,716	-
St. Pierre and Miquelon	2,871	1,629	-	17,590	-
United States					
Flour in terms of wheat	1,620	65,133	-	190,192	-
For milling in bond 4/	-	-	718,091	-	5,763,620
For domestic use 4/	-	-	898,997	-	17,018,739
Virgin Islands	2,871	2,295	-	10,161	-
<u>Oceania</u>					
French Oceania	-	25,308	-	25,308	-
Hawaii	-	-	-	117	-
<u>South America</u>					
Argentina	-	-	-	4	-
Bolivia	-	36,733	4,704	41,782	1,825,313
Brazil	-	-	-	320,445	11,089,012
Chile	-	-	-	-	1,477,534
Colombia	31,756	72,621	-	329,355	82,605
Ecuador	25,506	1,373	216,785	101,349	490,334
Peru	1,377	1,377	837,520	54,198	5,222,634
Surinam	15,318	15,845	-	153,423	-
Venezuela	294,907	269,284	3,125	2,380,725	42,375
Totals, Foreign Countries	1,833,786	2,766,245	20,334,146	23,397,197	171,936,231
Totals, All Countries	4,723,834	5,900,135	39,006,737	51,709,676	288,761,887

1/ Adjusted 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, Board of Grain Commissioners for Canada, for all countries except the United States. Subject to revision.

4/ 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				
	June 27	July 4	July 11	July 18	July 25
- cents and eighths per bushel -					
<u>Domestic</u>					
1 Northern	203/1	199	202/3	202/1	203/1
2 Northern	201/1	197	200/3	200/1	201/1
3 Northern	199/1	195	198/3	198/1	199/1
4 Northern	195/1	191	194/3	194/1	195/1
5 Wheat	175	175	175	175	175
6 Wheat	170	170	170	170	170
Feed Wheat	165	165	165	165	165
1 C.W. Garnet	201/1	197	200/3	200/1	201/1
1 Alberta Red Winter	203/1	199	202/3	202/1	203/1
1 C.W. Amber Durum	203/1	199	202/3	202/1	203/1
<u>Export - International Wheat Agreement 1/</u>					
1 Hard	179/1	179	178/6	178/5	178/3
1 Northern	179/1	179	178/6	178/5	178/3
2 Northern	177/1	177	176/6	176/5	176/3
3 Northern	175/1	175	174/6	174/5	174/3
4 Northern	171/1	171	170/6	170/5	170/3
5 Wheat	169	169	169	169	169
6 Wheat	164	164	164	164	164
Feed Wheat	159	159	159	159	159
1 C.W. Garnet	177/1	177	176/6	176/5	176/3
2 C.W. Garnet	176/1	176	175/6	175/5	175/3
3 C.W. Garnet	173/1	173	172/6	172/5	172/3
1 Alberta Red Winter	179/1	179	178/6	178/5	178/3
2 Alberta Winter	177/1	177	176/6	176/5	176/3
3 Alberta Winter	175/1	175	174/6	174/5	172/3
1 C.W. Amber Durum	179/1	179	178/6	178/5	178/3
2 C.W. Amber Durum	177/1	177	176/6	176/5	176/3
3 C.W. Amber Durum	176/1	176	175/6	175/5	175/3
<u>Export - Class II</u>					
1 Hard	203/1	199	202/7	202/6	207/4
1 Northern	203/1	199	202/7	202/6	207/4
2 Northern	201/1	197	200/7	200/6	205/4
3 Northern	199/1	195	198/7	198/6	203/4
4 Northern	195/1	191	194/7	194/6	199/4
5 Wheat	175	175	175	175	175
6 Wheat	170	170	170	170	170
Feed Wheat	165	165	165	165	165
1 C.W. Amber Durum	265/3	261	263/6	262/6	267/4
2 C.W. Amber Durum	263/3	259	260/7	259/6	264/4
3 C.W. Amber Durum	262/3	258	259/7	258/6	263/4

1/ Plus 6 cents carrying charge. Note:- For initial payment to producers see page 17 of the May 1953 issue of this publication.

CANADIAN FLOUR MILLING SITUATION

Production Wheat flour production reported by Canadian mills for June 1953, at 1,990,142 barrels, was slightly below both the May offtake of 2,157,213 barrels and the June 1952 output of 2,077,317 barrels. Total production of wheat flour recorded during the August-June period of the current crop year amounted to 21,988,619 barrels, some 5.2 per cent above the corresponding total for the same period of 1951-52. Mills reporting operations during June 1953 had a total rated capacity of 92,235 barrels, and on the basis of a 25-day working period, 86.3 per cent of their combined rated capacity was effective.

Exports Preliminary customs returns indicate that exports of Canadian wheat flour during June 1953 amounted to some 1,311,141 barrels, (5,900,135 bushels of wheat equivalent). Flour shipments during the month went to fifty-three countries and colonies, with the United Kingdom taking the largest amount, some 2.6 million bushels of wheat equivalent. Other major shipments, in thousands of bushels of wheat equivalent, went to Korea (938); Philippine Islands (532); Lebanon (303); Venezuela (269); Japan (154) and Jamaica (118).

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

Crop Year	Wheat Milled	Wheat Flour	
	for 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
1951-52	104,494,021	22,842,441	11,356,288
1952-53 2/			
August	8,809,102	1,943,274	747,518
September	9,557,709	2,120,469	1,102,225
October	10,330,803	2,302,489	1,394,807
November	9,858,945	2,182,652	1,122,627
December	8,170,237	1,835,627	1,265,133
January	7,887,271	1,771,786	826,274
February	7,951,654	1,797,376	659,726
March	8,802,652	1,972,109	956,282
April	8,545,315	1,915,482	1,040,759
May	9,607,163	2,157,213	1,064,547
June	8,890,188	1,990,142	1,311,141
Totals	98,411,039	21,988,619	11,491,039
Same period 1951-52 (Revised)	95,647,604	20,903,478	10,325,304

1/ Based on Customs returns. Exports for the crop years 1945-46-1951-52 revised to remove effect of time lag in the returns made by Customs.

2/ All items subject to revision from August 1952.

UNITED STATES SITUATION

Supply Position Total estimated supplies of wheat for the current crop year in the United States at 1,567.4 million bushels, consisted of the July 1, 1952 carryover of 255.6 million, the new crop of 1,291.4 million and July-June imports of 20.4 million bushels. After deducting estimated domestic requirements of 672.0 million bushels, some 895.4 million were available for export and carryover at the end of the crop year.

United States Wheat Supplies

Item	1951-52	1952-53 <u>1/</u>
	- million bushels -	
Carryover at beginning of crop year (July 1)	396.2	255.6
New crop	980.8	1,291.4
Total estimated domestic supplies	1,377.0	1,547.0
Imports of wheat for domestic use, July-June	30.1	20.4
Total estimated supplies	1,407.1	1,567.4
Less estimated domestic requirements for crop year <u>2/</u> .	677.7	672.0
Available for export and carryover	729.4	895.4
Deduct:		
Exports of wheat as grain, July-June	432.4	276.9
Exports of wheat flour and macaroni in terms of wheat, July-June	42.6	40.0
Total exports of wheat, wheat flour and macaroni.	475.0	316.9
Carryover at end of crop year (June 30)	254.4	578.5

1/ Preliminary. 2/ 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.

Preliminary data on exports of wheat as grain in the July-June period of the current crop year indicate shipments of some 276.9 million bushels, 36 per cent below the 432.4 million exported in the same period of 1951-52. Exports of wheat flour and macaroni in terms of wheat, remained slightly below the 1951-52 level, with exports for the period under review amounting to 40.0 million bushels as against 42.6 million for the July-June period of last season.

Total exports of wheat as grain and wheat flour and macaroni in terms of wheat during the 1952-53 crop year were 316.9 million bushels, some 33 per cent below the 475.0 million shipped in the preceding crop year. The balance remaining for carryover at the end of the crop year was estimated at 578.5 million bushels, well over twice the amount of 254.4 million available at the same date a year ago.

1953 Wheat Crop
Forecast at 1,175
Million Bushels

In a report issued on July 10, The Crop Reporting Board of the United States Department of Agriculture stated that an appraisal of crop conditions on July 1 indicates "Production of all wheat is expected to total 1,175 million bushels, an increase of 42 million over the June 1 forecast. The prospective 1953 crop is 9 per cent smaller than the 1952 crop of 1,291 million bushels, but 7.9 per cent larger than the 10-year average of 1,089 million bushels. Improvement during the past month in winter wheat prospects more than offset the slight decline in the prospective spring wheat crop. Favourable June weather for maturing and harvesting winter wheat over most of the country contributed to both a larger acreage for harvest and higher yields per acre than indicated a month ago. Stem rust is reported present in most spring wheat fields in the North Central States, but the effect on yields will depend on July and early August weather. The indicated yield per harvested acre is 17.5 bushels compared with 18.3 bushels a year ago and the 10-year average of 17.1 bushels per acre.

The total acreage for harvest this year is estimated at 67,225,000 acres, nearly 3.4 million less than last year but 3.3 million acres above the 10-year average. The acreage of wheat seeded in the fall of 1952 and the spring of 1953, at 78,553,000 acres, slightly exceeds the 77,447,000 acres seeded a year earlier. Abandonment of wheat has been moderately heavy this year, due primarily to adverse weather conditions over a considerable portion of the Southern Great Plains. Current indications point to an all wheat abandonment and diversion of 14.4 per cent or 11.3 million acres. This compares with 8.9 per cent or 6.9 million acres not harvested for grain a year ago and the 10-year average abandonment of 9.3 per cent or 6.7 million acres.

A winter wheat crop of 821,372,000 bushels for 1953 is forecast based on July 1 conditions. This is about 21 per cent smaller than the large 1952 crop of 1,053 million bushels, but slightly above the average of 797 million bushels. Current prospects are higher by about 51 million bushels, or 7 per cent, than indicated a month ago, with all major areas sharing in the larger outturn. For the country as a whole, the estimated yield per acre is 17.8 bushels compared with 20.9 bushels in 1952 and the 10-year average of 17.6 bushels.

A near-record crop of spring wheat is in prospect this year. Production of all spring wheat, based on crop conditions July 1, is forecast at 353 million bushels, a decrease of 9 million bushels from the June 1 forecast. Production last year totalled 239 million bushels, while the 10-year average was 291 million bushels. The largest crop on record was 368 million in 1915. Soil moisture reserves in the main spring wheat areas are generally favourable for growth and development of the crop. However, the presence of stem rust in the important producing area of Minnesota and the Dakotas on July 1 poses a potential threat to the crop in this area. Based on the July 1 reported condition, the prospective yield per harvested acre is estimated at 16.7 bushels, compared with 11.8 bushels last year and an average of 15.8 bushels.

Durum wheat production (included in spring wheat above) is forecast at 28,701,000 bushels, well above last year's small crop of 21,363,000 bushels, but far below the average of 37,360,000 bushels. The crop has made rapid growth during June, with moisture supplies ample to excessive. A serious threat of stem rust exists, with some infection in much of the area by July 1. Wet humid weather during July would likely bring rapid development of rust spores, while dry, cool weather would hold the spread of rust in check.

Wheat Stocks on Farms Carryover of old wheat on farms July 1 totalled 72,840,000 bushels—15 per cent more than a year earlier but 21 per cent less than the 10-year average. The current July 1 stocks are 5.6 per cent of the total 1952 production.

Disappearance from farms during the 3-month period ended June 30, 1953 was the largest of record and totalled 195,600,000 bushels—45 per cent more than either the comparable period last year or the 10-year average for the April—June quarter. This heavy movement is thought to be due primarily to movement of wheat on which loans were called April 30th, from farms to elevator storage. Approximately 62 per cent of the 1,354,526,000 bushel supply of wheat (production plus carryover on farms July 1, 1952) moved prior to October 1, 1952 and about 71 per cent had moved off of farms by January 1, 1953. Disappearance during January 1 to July 1, 1953 totalled 326,572,000 bushels compared to 271,439,000 bushels for the same 6-month period in 1952 and was well above the 10-year average of 289,393,000 bushels.

1954 Wheat Allotment A national acreage allotment of 62 million acres for the 1954 wheat crop was announced July 15 by the Secretary of Agriculture. He also set August 14 as the date for a referendum among wheat growers on the question of whether to use quotas in marketing the 1954 wheat crop. Quotas will not become effective unless at least two-thirds of the growers voting approve their use. Growers with more than 15 acres planted to wheat, and with normal production of 200 bushels or more, are subject to the quotas and are therefore eligible to vote in the referendum. If growers approve marketing quotas in the August 14 referendum, price supports on the 1954 wheat crop will be available to cooperators at 90 per cent of parity as provided by law. If growers do not approve quotas, price supports will drop to 50 per cent of parity.

CCC Buys Grain Bins The U. S. Department of Agriculture announced on July 8, the awarding of contracts for the purchase of 15,070 grain structures of a total capacity of approximately 89,405,475 bushels. These structures will be used for the storage of Commodity Credit Corporation grain in areas where other facilities are not available. They will be shipped during the next two months to locations in Illinois, Iowa, Kansas, Michigan, Minnesota, Nebraska, South Dakota, and Wisconsin.

Flour Production The Bureau of the Census, Department of Commerce, estimates wheat flour production in May 1953 at 17,695 thousand sacks, an average of 843 thousand sacks per working day, compared with production of 789 thousand sacks per working day in April, and 838 thousand sacks per working day in May 1952. Production of wheat flour in May was at 78.8 per cent of capacity, compared with 73.5 per cent the previous month.

Wheat flour mills in May ground 40,904 thousand bushels of wheat, compared with 40,103 thousand bushels ground in April. Wheat offal output was estimated at 347 thousand tons.

United States Wheat for Pakistan The first 10,000 tons of wheat to move to Pakistan out of a total of a million to be provided from the United States surplus stocks left for Karachi from Baltimore on June 27th. The transport of one million tons of wheat, if moved in full cargo lots, would require approximately 110 voyages by Liberty or Victory-type vessels. Half of the full amount of wheat, according to legislation passed in Congress must be carried in American-flag ships.

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 1, 1953	198 1/4 - 209 3/4	July 1, 1953	213 1/2 - 216 1/2
2	199 1/2 - 209 1/2	2	215 3/4 - 218 3/4
3	200 1/4 - 218	3	216 1/2 - 219 1/2
6	201 1/2 - 222	6	215 7/8 - 218 7/8
7	204 3/4 - 215 1/2	7	220 7/8 - 223 7/8
8	209 1/4 - 217 1/2	8	226 1/4 - 229 1/4
9	207 1/2 - 213 1/2	9	227 - 231
10	202 - 219 1/2	10	226 - 230
13	198 1/2 - 227 1/2	13	223 7/8 - 227 7/8
14	199 1/2 - 216 3/4	14	227 - 231
15	205 1/4 - 229 3/4	15	229 3/4 - 233 3/4
16	206 3/4 - 222	16	227 3/8 - 231 3/8
17	212 - 232	17	228 3/8 - 232 3/8
20	210 1/4 - 225 1/2	20	229 3/8 - 233 3/8
21	213 - 237 1/2	21	224 - 228
22	209 3/4 - 235	22	220 3/8 - 224 3/8
23	210 1/4 - 233 1/2	23	218 - 222
24	210 - 231 3/4	24	217 1/2 - 221 1/2
27	211 - 232 3/4	27	217 1/2 - 221 1/2
28	209 - 225	28	215 5/8 - 221 5/8
29	210 1/2 - 221	29	218 - 223

Chicago Wheat Futures, High Points of Closing

Date	July	September	December	March	May
	- cents and eighths per bushel -				
July 1, 1953	190/2	194/4	200/6	207	210
2	192/5	197/1	203/1	209	211/6
3	192/4	196/1	202/1	207/6	210/4
6	192	195/7	202/3	208	210/6
7	196	199/4	205/7	211/3	214
8	197/6	201	207/2	213/1	215
9	194	197/6	204/1	210/1	215
10	190/2	194	200/6	206/4	209
13	189/6	193/5	200/1	205/4	207/7
14	191/6	195/5	202/1	207/4	208/6
15	194	198	204/2	209/3	210/5
16	192/5	197	203/2	208/5	210/2
17	195/2	198/7	205	210	211/2
20	197/1	201	206/7	211/4	212/6
21	196/6	200	205/5	210/2	211/6
22	196/2	199/3	205	209/1	210/3
23		198/3	204/3	208/3	210/2
24		198/2	203/7	207/7	208/6
27		197/3	203/1	207/4	208/7
28		194/3	200/3	204/6	206/4
29		196/4	202/5	207	208/5
30		198/1	204/3	209/2	211/1

ARGENTINE SITUATION

Supply Position Estimated total supplies of wheat in the Argentine at 288.4 million bushels were unchanged from a month ago. Domestic requirements were still placed at 124.9 million bushels, leaving some 163.5 million available for export and for carryover at the end of the crop year. Although June exports of wheat at 10.1 million bushels were up slightly over those for May, total exports during the first seven months of the current crop year still amounted to only 29.3 million bushels. The balance of 134.2 million bushels remaining on July 1 for export and for carryover is in sharp contrast to the comparable figure of 1.8 million bushels at the same date a year ago.

Argentine Wheat Supplies

Item	1951-52	1952-53 <u>1/</u>
- million bushels -		
Carryover at beginning of crop year (December 1)	18.4	1.8
New crop	75.3	286.6 <u>2/</u>
Total estimated domestic supplies	93.7	288.4
Imports of wheat for domestic use	7.9 <u>3/</u>	-
Total estimated supplies	101.6	288.4
Less estimated domestic requirements for crop year ...	96.0	124.9
Available for export and carryover	5.6	163.5 <u>4/</u>
Deduct:		
Exports of wheat as grain, December—June	3.8	29.3
Exports of wheat flour in terms of wheat, December—June	<u>5/</u>	<u>5/</u>
Total exports of wheat and wheat flour	3.8	29.3
Balance on July 1 for export and carryover	1.8	134.2

1/ Preliminary. 2/ Official estimate as of February 27, 1953.

3/ Imported under barter arrangement in exchange for Argentine corn.

4/ It has been officially announced that 400,000 metric tons (14.7 million bushels) of wheat are to be stored from the 1952-53 crop to constitute a reserve.

5/ Less than 50,000 bushels.

The following account of the Argentine situation has been extracted from a report from Mr. W. F. Hillhouse, Agricultural Secretary, Canadian Embassy, Buenos Aires, under date of July 14, 1953, 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 Weather conditions have, generally speaking, been favourable during the past month though not optimum. Continued humidity, especially in the early part of the period, continued to render drying of corn

difficult. Although rainfall in the provinces of Buenos Aires, Cordoba and Santa Fé made ploughing difficult and delayed sowing in certain areas, seeding of wheat is proceeding very satisfactorily. Moisture reserves are excellent, thus laying the foundation for another above-average wheat crop. Rather heavy frosts in late June and early July in the southern zone and snow in the southwest have caused some anxiety but there are no confirmed reports of appreciable damage.

Pasture conditions continue good to excellent although there has been some deterioration in quality due to excessive rainfall in some parts.

Wheat - 1953-54 Crop To the accompaniment of an energetic government program to encourage increased acreage, sowings for the current wheat crop are approaching completion under good conditions with plenty of moisture reserve. Private forecasts suggest that sowings this year may be as much as 20 per cent higher than last year in the northern zone and approximately the same as last season or slightly greater in the south. A total seeded area of somewhat less than 7 million hectares (17.3 million acres) may, therefore, be expected. This would compare with 6.1 million hectares (15.1 million acres) last year and, given average yields, would produce approximately 6 million metric tons (220.5 million bushels).

The following table, however, which gives sowings and production for recent years, provides interesting evidence of the unreliability of sowings as the basis for calculating production in any one year.

Argentine Wheat Production

Crop Year	Area	Average Yield per Acre	Production
	- thousand acres -	- bushels -	- thousand bushels -
1943-44	16,824	14.9	249,857
1944-45	15,394	9.8	150,109
1945-46	14,232	10.1	143,558
1946-47	16,484	12.5	206,316
1947-48	13,461	17.7	238,834
1948-49	14,340	13.3	191,067
1949-50	14,059	13.4	189,010
1950-51	16,189	13.2	212,966
1951-52	11,834	6.5	77,162
1952-53	15,076	19.0	286,601
10-year average ..	14,789	13.2	194,547

Wheat - 1952-53 Crop The United Kingdom has purchased 80,000 long tons (2,987,000 bushels) of wheat at £29.10.0d per long ton c & f and about 10,000 metric tons (367,000 bushels) are reported to have been sold to Belgium. On the other hand Brazil has decided not to take up the option on 300,000 tons (11,023,000 bushels) of wheat and Argentina will consequently ship only the 1,116,000 tons (41,006,000 bushels) originally contracted. The known foreign commitments against the 1952-53 crop to date are as follows:

	<u>Thousand Bushels</u>	<u>Price</u>	
Paraguay	2,572	U\$S 125, f.o.b.	
Italy	11,023	Reported to be at prices ranging from U\$S 95 to U\$S 100, f.o.b.	Under terms of trade agreement signed June 25, 1952
India	9,370	£26.4.2d. f.o.b.	Barter deal signed October 22, 1952 whereby wheat exchanged for 40,000 tons jute
Brazil	41,006	U\$S 112 f.o.b.	Sale announced March 6, 1953
U.K.	2,988	£29.10.0d., c & f	Sale announced June 22, 1953. This is part of 215,000 tons sold by I.A.P.I. to local exporters in exchange for Indian jute
Belgium	367	Not yet known	
Japan	<u>11,023 (estimated)</u> <u>78,349</u>		

Domestic requirements of some 3.4 million metric tons (124.9 million bushels) plus the reserve stockpile of 400,000 tons, (14,697,000 bushels) lead to the conclusion that from the 1952-53 crop of 7.8 million tons (286.6 million bushels) there remain some 1.8 million tons (66.1 million bushels) for disposal.

Policy Items (a) Agrarian Reform.— In an important address to agriculturalists on June 11 in which he outlined a program for agrarian reform, President Perón allayed the fears of the large landowners concerning possible confiscation of their holdings by the Government. He indicated that the worst cases of large unexploited land tracts were those that are State-owned. These, the President said, would be distributed and put into economic production. Inefficient landowners would be assisted and encouraged to increase their output. If these showed no improvement it might be necessary for the State to buy up their land and distribute it to those who would make it produce. However, such action would not be taken until State-owned lands had been similarly distributed. In any event, efficient landowners, regardless of their holdings, were assured that they had no cause to fear that these would be interfered with.

(b) Wheat Acreage - 1953-54.— A Government-sponsored campaign commenced early in 1952 with a view to increasing the production of wheat, corn and other important earners of foreign exchange. Under the terms of the Second

Five-Year Plan the proposed wheat acreage for 1957-58 is 8 million hectares (19.8 million acres) compared with the five-year average ended 1939-40 of 7.5 million hectares (18.5 million acres) and only 4.8 million hectares (11.9 million acres) in 1951-52. If early estimates of the current acreage at 7 million hectares (17.3 million acres) should be confirmed it would appear that the Government's campaign is indeed bearing some fruit so far as this grain is concerned.

In this connection it is understood that some farmers have planted wheat in place of rye as a winter pasture crop this season, the former being more remunerative in the case of there being no need to pasture it off. Should this practice become at all widespread it will increase the difficulty of forecasting production.

(c) I.A.P.I.'s Export Price on Grains.- Effective July 1, I.A.P.I. abolished the minimum export prices established on all grains and will consider offers from exporters, taking into account quality, period of shipment, type of currency, etc. Reductions had previously been made on specific shipments, but it is only now that the Institute announces that it is open to receive offers. This action should provide a flexibility in keeping with present realities of international grain trade.

(d) Importation of Spares for Agricultural Machinery.- The Argentine Central Bank has allocated foreign exchange to the value of 40 million pesos (\$8 million) for the importation of spare parts for agricultural machinery already in the country. Previously 50 million pesos (\$10 million) were granted for the importation of raw materials destined for the local agricultural machinery industry as well as 48 million pesos (\$9.6 million) for Italian industrial machinery to equip these factories.

Grain Shipments The month's grain shipments at 424,307 metric tons (15,591,000 bushels) were the highest for the month of June in any of the past five years and were twice as large as the average shipments of the previous five months. They brought the total for the first six months of the year to 1,410,880 tons (51,841,000 bushels) of which over fifty per cent comprised wheat. Corn at 331,491 tons (13,050,000 bushels) accounted for over half the total of other grains shipped.

Brazil was Argentina's chief customer for grain during the first half of 1953 taking 348,281 tons followed by Italy with 296,033 tons. India and the United Kingdom received 236,613 tons and 220,721 tons, respectively.

Wheat shipments to India in the six months ended June 30 at 236,613 tons (8,694,000 bushels) and to Italy at 225,497 tons (8,286,000 bushels) almost completed these countries' contracts for 255,000 tons (9,370,000 bushels) and 300,000 tons (11,023,000 bushels), respectively. Brazil, on the other hand, has to date only received 296,434 tons (10,892,000 bushels) against the contracted 1.1 million tons (40.4 million bushels).

The following table shows shipments of all grains in the first six months of 1953 with comparative data for recent years:

Argentine Grain Shipments, January-June, 1953

Destination	Wheat	Corn	Flax	Oats	Rye	Barley
- thousand bushels -						
Austria	-	59	-	58	-	-
Belgium	103	1,785	-	971	398	36
Brazil	10,892	1,951	-	148	-	-
Finland	-	-	-	-	-	338
France	-	2,428	390	-	216	-
Germany	-	-	-	45	-	-
India	8,694	-	-	-	-	-
Israel	-	-	-	41	-	253
Italy	8,286	2,277	-	726	-	69
Korea	-	-	-	-	-	1,259
Netherlands	-	7	-	311	144	892
Norway	-	-	-	-	433	-
Paraguay	669	-	-	-	-	-
Peru	418	-	-	-	-	-
South Africa	-	6	-	-	-	-
Sweden	-	505	-	-	-	-
Switzerland	-	54	-	1,378	-	-
United Kingdom	-	3,979	-	-	-	5,495
United States	-	-	-	99	-	-
Totals	29,061	13,050	390	3,778	1,191	8,728
Same period:						
1952	2,265	13,357	942	2,368	4,385	4,806
1951	62,336	1,073	5,715	2,100	6,824	321
1950	59,759	27,554	961	11,191	4,830	3,099
1949	39,997	19,568	-	4,430	2,510	5,407

AUSTRALIAN SITUATION

Supply Position Total estimated supplies of wheat for the current crop year now stand at 211.0 million bushels following an upward revision of December 1 carryover from 16.9 million to 18.0 million bushels. With estimated domestic requirements reduced from 78.4 million to 72.5 million bushels some 138.5 million bushels were available for export and for carryover at the end of the crop year.

Exports of wheat as grain during the December 1-July 4 period of 1952-53 totalled 42.1 million bushels as against 26.3 million for the corresponding period of the preceding crop year. Some 25.2 million bushels of wheat flour in terms of wheat were exported from December 1 to July 4 of the current crop year as compared with 20.9 million bushels exported during the same period of 1951-52. Total exports of wheat and wheat flour in terms of wheat equivalent at 67.3 million bushels were some 20.1 million greater than the total of 47.2 million exported during the comparable period of last season. The balance of 71.2 million bushels remaining on July 5 for export and carryover was well above the 50.5 million available on approximately the same date a year ago.

Australian Wheat Supplies

Item	1951-52 <u>1/</u>	1952-53 <u>2/</u>
- million bushels -		
Carryover, including flour as wheat, at beginning of crop year (December 1)	19.4	18.0 <u>3/</u>
New crop	159.7	193.0
Total estimated supplies	179.1	211.0
Less estimated domestic requirements for crop year ...	81.4	72.5 <u>4/</u>
Available for export and carryover	97.7	138.5
Deduct:		
Exports of wheat as grain, December 1 to July 4	26.3	42.1
Exports of wheat flour in terms of wheat, December 1 to July 4	20.9	25.2
Total exports of wheat and wheat flour	47.2	67.3
Balance on July 5 for export and carryover	50.5	71.2

1/ Subject to revision. 2/ Preliminary. 3/ Figure adjusted end of March.
4/ Revised.

The following account of the Australian situation has been extracted from a report from Mr. R. W. Blake, Commercial Secretary for Canada, Melbourne, under date of July 16, 1953 and is reproduced with the kind permission of the Trade Commissioner Service, Department of Trade and Commerce.

Weather and Crops Early seasonal weather conditions, which have been good in most States of the Commonwealth, have deteriorated in New South Wales and Queensland because of exceptionally dry and frosty weather, a continuation of which will reduce crop prospects.

About 80 per cent of the wheat belt in New South Wales is in urgent need of rain and is nearing the critical stage. Farmers intentions to sow in New South Wales, for all purposes, are estimated at about 3.6 million acres, an increase of 26 per cent on last year's acreage. Due to the lack of rain, this acreage is not likely to be realised now.

Rain is also urgently needed on the Darling Downs in Queensland, the main wheat growing area in that State, in order to enable farmers to sow the balance of the land prepared for wheat. A record of 800,000 acres has been prepared for wheat this year compared with 750,000 acres last year, which was the previous highest figure. However, if rain does not fall in July, the acreage and yield of wheat will be reduced below last year's figure. By July 1st 300,000 acres had been sown to wheat and the extent of further sowing depends on the weather.

June rains in Victoria and South Australia benefited early-sown crops but fine weather is needed now to permit seeding to be completed. Early estimates indicated that the wheat acreage in these two States would be above last season's, but it is too soon yet to forecast this season's acreage accurately.

Western Australia has had abnormal rains, which have affected the area sown to wheat, due to the saturated condition of the ground. It is estimated that the acreage sown to wheat this year is 20 per cent less than the 3.3 million acres growers had planned to sow. Last year, Western Australia had 3 million acres in wheat.

More accurate estimates of the acreage sown to wheat in Australia this season should be available next month.

International
Wheat Agreement

The Minister for Commerce and Agriculture has announced that Australia will re-enter the International Wheat Agreement on the broad terms fixed at a Washington conference early this year.

The Minister said that Australia would seek a reduction of her quota to 48 million bushels for each of the three years, from the 75 million bushels set in the draft agreement. When signing the agreement, Australia reserved the right to apply for a reduced quota so that she could continue to supply wheat and flour to important markets hitherto supplied from the British quota.

A Bill for ratification of the agreement will be submitted to Parliament as soon as possible. The International Wheat Council is being asked for an extension of time to legislate for entry into the I.W.A. Australia will continue to sell wheat outside the agreement to Britain on the same broad principles as wheat sales were made outside the terms of the last International Agreement.

Marketing Plan

The Minister for Commerce and Agriculture has announced that the Commonwealth and all State Governments will legislate for an orderly wheat marketing plan to begin with the harvesting of the 1953-54 wheat crop. The Australian Wheat Board will continue to be the central wheat marketing authority for all Australian wheat, whether or not there is a new wheat stabilisation plan.

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In addition to current information on the overall wheat situation in Australia, Mr. Blake has provided the following report on bulk handling in New South Wales. The original source is given as the Wheat Board Gazette for June 1953.

Development of Bulk Handling of Wheat in New South Wales

Losses of grain through wet weather and pests during the first World War resulted in a Royal Commission being appointed in 1917 to investigate grain handling facilities in New South Wales. The Commission reported in favour of the erection of permanent storage facilities.

Operation

Terminal grain elevators at Sydney and Newcastle were first used in 1920-21, but it was not until 1923-24 that the elevators were used in their true sense as a public utility. The operations were covered by regulations only. These embraced conditions under which the wheat was received and stored, and determined the charges to be made.

In 1927, the "Wheat Act 1927" was passed and this Act provided that for all wheat received a warrant was to be issued in the prescribed form,

representing the title to the wheat. These warrants were purchased by users of the wheat and subsequently presented to the Government Grain Elevators. Subject to payment of the prescribed charges, delivery of wheat was then made as required.

With the outbreak of World War II, the functions of Elevators were varied in some respects to meet the changed conditions. All wheat received was subject to the control of the Australian Wheat Board, appointed by the Commonwealth Government, and was administered in the form of "Pools" from which the growers were entitled to such advances as were declared from time to time. The issue of negotiable warrants was therefore discontinued, thus eliminating speculation, and making the wheat available for national purposes.

With the termination of the 1939-45 War, the powers of the Commonwealth Government to acquire all wheat grown under National Security Regulations lapsed, but legislation was passed by the Commonwealth and State Governments to permit the Australian Wheat Board continuing to function under the Wheat Stabilisation Scheme.

<u>Handling Methods</u> <u>at Terminal and</u> <u>Country Elevators</u>	At June 30, 1952, the elevator system comprised two terminal elevators, one at Sydney, with a storage capacity of 7.5 million bushels, and one at Newcastle with a capacity of 800,000 bushels, together with 180 country elevators with a total storage capacity of 25,128,000 bushels. The terminal elevators are equipped to handle and ship classified wheats, including facilities for cleaning and conditioning. The Sydney elevator has a receiving capacity of 300,000 bushels per day, and a shipping capacity of 448,000 bushels per 8 hour day.
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The country elevators receive farmers' wheat in bulk and load it into railway trucks. These are open trucks covered with tarpaulins but special railway trucks are now being provided for handling wheat in bulk, fitted with hopper bottoms, which speeds unloading. The latest plants are fitted with weighbridges for inwards weighing, and the majority of plants are equipped with outwards scales. The storage capacity of country elevators ranges from 30,000 bushels to 550,000 bushels.

They are built of concrete and steel with corrugated galvanised iron coverings, and are nearly all capable of receiving classified or graded wheat in bulk. A few have electric power, but most are operated with kerosene burning engines, although conversion to electric power is carried out as opportunity occurs. These plants are capable of receiving or delivering grain at the rate of approximately 2,600 bushels per hour.

Approval by the government has been given for the construction of four sub-terminals to be located at strategic points in the wheat-growing areas. These will each have a capacity of 3 million bushels of wheat. Overflow wheat from the country elevators can be forwarded to the sub-terminals and permit greater use to be made of the available railway trucks.

Bulk heads have been provided to increase the storage capacity at country elevator points, and to provide storage at points where there are no elevators. Eighty-five of these were available in the 1952-53 season, thirty-six being at stations without elevators.

The bulk heads are sheds with galvanised iron walls and roof supported by poles, holding approximately 100,000 bushels of wheat. Wheat is received from farmers' trucks into portable elevators from where it is spouted into the bulkhead. The wheat is conveyed from the bulk heads into railway trucks by means of portable elevators or grain augers.

Advantages of Bulk Handling of Wheat in New South Wales Wheat can be kept in safe storage, and economies are effected in the receipt and delivery of wheat. Loading into ships at the terminal elevators is greatly speeded up, thus reducing loading and port charges. The savings made by farmers not having to buy sacks is considerable.

Future Programme It is the policy of the government to provide country elevators at all stations throughout the State where needed, as well as extensions to existing sub-terminal and country elevators.

FRENCH SITUATION

The following account of the current crop situation in France has been provided by Miss V. F. Wightman, Office of the Commercial Counsellor for Canada, Paris, under date of July 21 and is reproduced with the kind permission of the Trade Commissioner Service, Department of Trade and Commerce. Conversions from French to Canadian measures have been made for the convenience of our readers. Currency conversions were made at the rate of 1 franc = .00284 Canadian dollars.

Growing Conditions The weather from the beginning of June to mid-July was, on the whole, unfavourable to the developing grain crops; due to frequent rainfall and below normal temperatures, the harvest which was originally ahead of time will now be slightly later than usual. Harvesting is now well under way in the more southern zones, and is beginning in the region of Paris.

However, with the exception of oats, grain fields continue to develop well and the July 1st estimate of the Ministry of Agriculture indicates higher production than did the June 1st estimate. The 1953 wheat crop is now calculated at 8.2 million metric tons (301 million bushels); this is almost 300,000 tons (11,023,000 bushels) higher than the first estimate and approaches last year's record crop of 8.4 million tons (309 million bushels). This is due to a higher yield forecast for this season inasmuch as the area seeded at 4,150,000 hectares (10.3 million acres) is slightly lower than the 4,296,500 hectares (10.6 million acres) in 1952.

Official Estimates The current official estimates of yield and production for the principal grains are as follows:

Grain	Yield			Production		
	July 1, 1953	1952	Average 1947-51	July 1, 1953	1952	Average 1947-1951
	- bushels -			- thousand bushels -		
Wheat	29.4	29.1	24.1	301,995	309,421	248,381
Rye	17.5	17.8	17.5	18,198	18,956	21,790
Barley	32.0	29.9	28.3	94,143	79,418	64,948
Oats	38.8	38.5	35.6	218,901	217,532	212,949

Barley production is expected to be around 300,000 tons (13,779,000 bushels) higher than last year. This is due, in part, to the general trend in favour of barley but also, this season, to certain of the land originally intended for wheat being sown to spring barley.

Producers Prices As of mid-July when the grain harvest began there had been no announcement of producers prices for the 1953 crop. The Ministry of Agriculture therefore established the following payments on account for grain delivered to elevators and warehouses:

	<u>Francs per Quintal</u>	<u>\$ per bushel</u>
Wheat	3,000	2.32
Rye	2,250	1.62
Barley	2,000	1.24
Oats	1,900	0.83

The delay in establishing the new grain prices may be partially attributed to the desire on the part of producers groups, to establish an automatic system linking the wheat price to the general cost of living and also to tie the grain price in with a re-organization of the Grain Board. In June the Agricultural Committee of the National Assembly adopted certain recommendations along the lines of those proposed by the Wheat Producers Association. It was suggested that the present wheat price of 3,600 francs per quintal (\$2.78 per bushel) be taken as the base and modified each year on the basis of 40 per cent determined by the cost of living index, and 60 per cent on the index of goods essential to agriculture. This system has not yet been accepted by the Government, and for the 1953 crop it is expected that there will be no change from the current price; it is generally understood that farmers consider this price adequate.

The Agricultural Committee suggested further that domestic trade in feed grains be returned to private trade but that there be a price support; they also urged that control over milling operations be relaxed on a gradual basis. On the subject of the French Grain Board, the Committee recommended that it be returned to its prewar status of an inter-professional body composed of farmers, millers, government officials, etc. The National Assembly has not yet acted on these recommendations.

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The following background material relating to wheat production in France and North Africa has been extracted from a report from Miss Wightman dated July 6.

On the occasion of the recent assembly of the Association of Wheat Producers at Auxerre the Association has prepared some interesting information on the overall French position on wheat...., the main points of which are given below.

France The evolution of French wheat production over the past 40 years is shown in the following table; for the past few years, acreage has stabilized at around 4,250,000 hectares (some 10.5 million acres) which, as a result of improved yields, gives a production figure comparable with that of the thirties.

Year	Area	Yield per Acre	Production
	- thousand acres -	- bushels -	- thousand bushels -
1911-12-13	16,094	20.2	324,665
1930-39	12,912	23.0	296,941
1948-52	10,527	27.1	285,496

While the overall yield of wheat in France is not as high as in many other Western European countries, critical comparisons which appear in the Press, are not fully justified as in the main zones of production yields compare favourably with any other country. The differences in yield by region will be noted below and in addition there are small patches of cultivation in most other departments where the grain is either fed to livestock on the farm or handed over to the local miller or baker in exchange for bread.

Variations in French Wheat Yield
(Average 1948-52)

North		West		East		South-West	
Region	Yield per Acre	Region	Yield per Acre	Region	Yield per Acre	Region	Yield per Acre
	bu.		bu.		bu.		bu.
Aisne	38.9	Loiret	32.8	Bas-Rhin ..	35.5	Charente	22.3
Oise	38.3	Indre & Loire.	26.0	Haut-Rhin..	25.4	Lot-et-Garonne	17.8
Seine & Oise.	39.3	Maine & Loire.	26.7	Meuse	22.0		
Seine & Marne	41.1	Sarthe	27.8	Aube	29.5		
Somme	35.8	Côtes du Nord.	28.8	Marne	37.1		
Nord	49.0	Finistère	28.2				
Eure & Loir..	37.3						

On well managed farms in the better growing regions, yields range upwards from 30 quintals per hectare (45 bushels per acre) and have been known to reach 60 or 65, (89 or 96 bushels per acre). Likewise in less favoured regions, yields of 30 quintals per hectare (45 bushels per acre) are not infrequent. Scientists who have, up to now, been concentrating on varieties of seed for the best districts are now devoting more time to varieties which would raise yields in the poorer land, and this may in time raise the national level appreciably.

French consumption of wheat in the form of bread has shown a steady decline throughout this century:

Years	Consumption of Bread per Capita per Year	Wheat Used
	- lb. -	- million bushels -
1909-1914	483	286 - 293
1929-1934	418	264 - 271
1934-1939	407	260 - 264
1948-1952	275	191 - 194

Total French requirements of wheat for bread, pastry, seed, losses, etc. now stand at around 63-65 million quintals (231 - 238 million bushels) to which should be added 3 - 4 million (11 - 15 million bushels) for North Africa and other Overseas Territories, or a total of 65 - 70 quintals (238 - 257 million bushels).

North Africa As a result of the improving standard of living, consumption of bread grain has risen appreciably, and the North African position has changed from being that of a net exporter prewar (annual average of 2.3 million quintals (8.4 million bushels) in 1930-38) to a net importer (590,000 quintals (2.2 million bushels) in 1948-52). North African production of Durum wheat just about covers total requirements of 3.5 to 3.9 million quintals (12.8 to 14.3 million bushels) for the alimentary paste industry of that area and Metropolitan France.

NETHERLANDS SITUATION

The following report on the grain situation in the Netherlands has been provided by Mr. C. J. Small, Acting Agricultural Secretary for Canada, The Hague under date of July 15 and is reproduced with the kind permission of the Trade Commissioner Service, Department of Trade and Commerce.

There has been a marked decline in grain areas in 1953 with the exception of barley and oats. A fall of 32,000 hectares (79,000 acres) in winter wheat sown was only partially compensated by an increase of 15,000 hectares (37,000 acres) of spring wheat, bringing this year's total wheat area to 65,000 hectares (161,000 acres) compared with 82,000 hectares (203,000 acres) in 1952. Rye seedings have fallen by 14,000 hectares (35,000 acres) to 170,000 hectares (420,000 acres) and corn by 4,000 to 10,000 (10,000 to 25,000 acres) reversing three years of steady increases. The oats area is up 3,500 hectares (9,000 acres) but most of the increase can be written off because 3,000 hectares (7,000 acres) of the total are on previously flooded land. Similarly, the startling increase of 32,500 hectares (80,000 acres) barley compared with 1952 can be entirely misleading if allowance is not made for the 42,000 hectares (104,000 acres) sown on land inundated by salt water earlier this year. Virtually nothing will be harvested from this land and the remaining 60,000 hectares (148,000 acres) is 9,500 (23,000 acres) less than in 1952. Barley is one of the best crops for rehabilitation of brackish soils and this explains the substantial increase in barley seedings this year.

Taking hypothetical yields, which can be considered normal under present conditions, of 3,500, 2,800, 3,200 and 3,000 kilograms per hectare (52.1, 44.6, 59.5 and 78.8 bushels per acre) for wheat, rye, barley and oats, respectively, and discounting the areas of grain sown in the flood districts, the following estimated grain harvest for 1953 in the Netherlands can be arrived at and is compared with actual results achieved in 1952.

Grain	1952	1953*	Decrease	
	- thousand bushels -		- thousand bushels -	- per cent -
Wheat	12,015	7,973	4,042	33.6
Rye	19,566	18,739	827	4.2
Barley	11,023	8,818	2,205	20.0
Oats	31,318	29,762	1,556	5.0

*Estimated.

These estimates combined with the fact of expanding livestock numbers, indicate a need for substantially increased imports of grain in the 1953-54 season or, in the case of rye and oats, a decrease in exports. Last year these amounted to 13,000 and 34,000 tons (512,000 and 2,205,000 bushels), respectively. The foregoing estimates may well prove to be on the conservative side in view of the improved weather conditions in the latter half of June and first week in July which have given the grain crops every appearance of being above average in yield—crops in the flood district excepted.

CALENDAR OF WHEAT EVENTS

- July 10 - The production of all wheat in the United States, based on conditions at July 1, was forecast at 1,175 million bushels, an increase of 42 million over the June 1 forecast. The prospective 1953 crop is 9 per cent smaller than the 1952 crop but 7.9 per cent larger than the 1942—1951 average.
- According to a report issued by the Crop Reporting Board of the United States Department of Agriculture the carryover of all wheat on farms July 1 totalled 72,840,000 bushels, 15 per cent more than a year earlier but 21 per cent less than the 1942—1951 average.
- 13 - The United States Senate approved the terms of the new International Wheat Agreement.
- 15 - The Canadian Wheat Board announced important changes in its delivery quota policy, to become effective August 1, 1953. For details see Page 5 of this Review.
- The United States Secretary of Agriculture, Ezra Taft Benson, announced a national acreage allotment of 62 million acres for the 1954 United States wheat crop. August 14 was set as the date for a referendum among wheat growers on the question of whether to use quotas in marketing the 1954 wheat crop.
- 16 - The Dominion Bureau of Statistics report on Condition of Field Crops at June 30 places the all-Canada spring wheat condition at 122 as compared with 125 at June 30, 1952 and 109 on June 30, 1951. The condition of winter wheat at the same date is given as 104 in 1953 and 91 and 93 in 1952 and 1951, respectively.
- 21 - The Canadian Wheat Board announced that initial payments for wheat effective for the crop year commencing August 1, 1953 would be \$1.40 per bushel basis No. 1 Northern Wheat in store Fort William—Port Arthur or Vancouver. In establishing grade spreads for the 1953-54 crop year, the Board will provide that a premium will be paid on top grades of Durum wheat.
- 29 - The Dominion Bureau of Statistics estimates Canada's 1953 wheat acreage at 25,512,600 acres, a decrease of 2 per cent from the 1952 level of 25,995,000 acres.

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