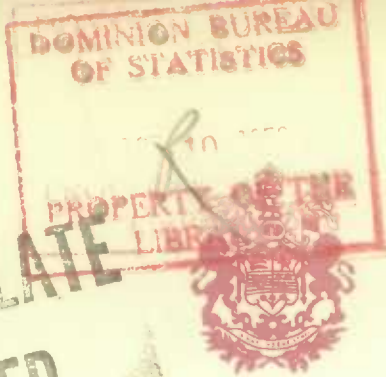


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CANADA

DOMINION BUREAU OF STATISTICS  
AGRICULTURE DIVISION

# THE WHEAT REVIEW



SEPTEMBER, 1952



DOMINION BUREAU OF STATISTICS  
Department of Trade and Commerce

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THE  
WHEAT REVIEW

SEPTEMBER, 1952

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## WORLD WHEAT SITUATION

Current Supplies Latest available estimates indicate that supplies of wheat remaining on or about September 1, 1952 in the four major exporting countries for export and carryover at the end of their respective crop years amounted to 1,543.4 million bushels, some 23 per cent greater than the 1,253.8 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, 811.1 (629.7); Canada, 696.1 (547.7); Australia, 36.2 (44.2); and Argentina 0.0 (32.2). Estimates for both years include on-farm stocks as well as those in commercial positions. The inclusion this month of the new Canadian crop accounts for the sharp increase in the supply position compared with that reported last month.

Record World Breadgrain Crop In Prospect According to the September 22 issue of 'Foreign Crops and Markets' published by the United States Department of Agriculture, world breadgrain production in 1952-53 tentatively is forecast at about 258 million short tons, 10 million tons above the previous record crop of 248 million tons in 1938-39, according to information available to the Office of Foreign Agricultural Relations. The favourable outlook is due to a record wheat crop, with present information pointing to a below-average world rye harvest.

The wheat outturn appears above average in all Northern Hemisphere Continents, but the sharpest increase is for North America. Current estimates place the harvest in this Continent at an all-time record level; Canada's harvest is forecast at a figure somewhat above the previous record, and the United States production is the second largest on record. Though too early in the growing season in the Southern Hemisphere for definite indications, present prospects point to around average crops in South America and slightly below average in Australia.

World wheat production is forecast at 7.15 billion bushels compared with 6.48 billion a year ago and 6.02 billion, the average for 1935-39. A near-record harvest is reported for Western Europe, reducing import requirements for this traditionally deficit area at the same time that the exporting countries of North America are harvesting record or near-record crops. Though a record outturn is reported for Asia, substantial imports will again be needed especially in India where the wheat crop was reported below average and a current scarcity of rice adds to the food problem.

World production of rye is estimated at 1.57 billion bushels. This is 5 per cent below the 1951-52 harvest and about 10 per cent below the pre-war average. The reduction from last year's total is attributed mainly to reduced yields in the Soviet Union. Those lower yields, together with a substantial reduction in Europe's rye acreage, account for the bulk of the reduction from the pre-war level. These two Continents together normally produce about 95 per cent of the world rye crop.

International Wheat Agreement Sales and Purchases Transactions recorded by the International Wheat Council through September 19, 1952 (except for Canadian sales which were reported through September 23) totalled 169.0 million bushels or 29 per cent of the 1952-53 guaranteed quantities of 580.9 million bushels. Details of current crop-year transactions are set out in the table on the following page.

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

Importing Countries	Guaranteed Quantities 1/	Source				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	8,946	-	-	385	9,331	10,878
Bolivia 5/ .....	2,756	2,297	-	-	321	2,618	-
Brazil .....	13,228	-	-	-	116	116	13,112
Ceylon .....	6,614	-	4,641	-	503	5,144	1,470
Costa Rica .....	1,213	208	-	-	212	420	793
Cuba .....	7,422	55	-	-	543	598	6,824
Denmark .....	1,617	747	-	-	325	1,072	545
Dominican Republic ...	876	177	-	-	125	302	574
Ecuador .....	1,286	557	-	-	245	802	484
Egypt 5/.....	14,697	6,602	-	-	7,361	13,963	-
El Salvador .....	404	33	-	-	67	100	304
Germany .....	66,139	3,180	299	-	19,474	22,953	43,186
Greece .....	15,726	-	-	-	2,939	2,939	12,787
Guatemala .....	919	170	-	-	217	387	532
Haiti .....	1,029	30	-	-	-	30	999
Honduras Republic ....	367	43	-	-	104	147	220
Iceland .....	404	18	-	-	56	74	330
India .....	55,116	-	1,867	-	1,762	3,629	51,487
Indonesia .....	3,674	46	1,551	-	549	2,146	1,528
Ireland .....	10,104	5,600	1,262	-	-	6,862	3,242
Israel .....	5,879	2,109	-	-	1,038	3,147	2,732
Italy .....	40,418	-	299	-	2,459	2,758	37,660
Japan .....	18,372	3,674	915	-	3,250	7,839	10,533
Lebanon .....	2,388	370	-	-	256	626	1,762
Liberia .....	37	18	-	-	-	18	19
Mexico .....	12,860	-	-	-	1,469	1,469	11,391
Netherlands .....	24,802	7,884	727	-	7,062	15,673	9,129
New Zealand .....	4,593	-	3,049	-	-	3,049	1,544
Nicaragua .....	331	74	-	-	71	145	186
Norway .....	7,716	1,867	168	-	2,166	4,201	3,515
Panama 5/ .....	625	487	-	-	107	594	-
Peru .....	5,512	1,842	-	-	1,776	3,618	1,894
Philippines .....	7,202	1,372	-	-	1,198	2,570	4,632
Portugal .....	5,626	666	6	-	1,587	2,259	3,367
Saudi Arabia .....	1,837	-	-	-	221	221	1,616
Spain .....	4,373	-	-	-	1,505	1,505	2,868
Sweden .....	2,756	-	299	-	1,699	1,998	758
Switzerland .....	6,430	3,674	-	-	1,766	5,440	990
Union of South Africa.	11,023	5,600	-	-	2,053	7,653	3,370
United Kingdom .....	177,068	9,475	14,771	-	4,163	28,409	148,659
Venezuela .....	6,246	1,310	-	-	461	1,771	4,475
Totals .....	580,917	69,131	29,854	-	69,966	168,951	
Guaranteed Quantities (Exporting Countries).		235,000	88,700	4,089	253,128	580,917	
Balance .....		165,869	58,846	4,089	183,162	411,966	

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

2/ Canadian sales through September 23, 1952.

3/ Sales recorded by International Wheat Council through September 19, 1952.

4/ These quantities are the unfulfilled balances of the total guaranteed quantities for the year. Purchases and sales against these balances are restricted in accordance with Note 1/

5/ 95 per cent of quota filled.

## CANADIAN SITUATION

Supply Position      Potential supplies of Canadian wheat for the 1952-53 crop year amount to 888.1 million bushels, comprised of carryover stocks of 213.0 million bushels and the new crop, estimated on the basis of conditions at August 31, at a record 675.1 million bushels. Supplies of this magnitude would be 146.2 million bushels greater than in 1951-52 and would be second only to the record total of 980.4 million bushels in 1942-43. In that year, however, carryover stocks alone totalled 423.8 million bushels, larger than an average Canadian wheat crop.

### Canadian Wheat Supplies

Item	1952-53 1/	1951-52 2/
	- million bushels -	
Carryover in North America at July 31 .....	213.0	189.2
New crop .....	675.1	552.7
Imports of wheat, August .....	3/	3/
Total estimated supplies .....	888.1	741.9
Less estimated domestic requirements for crop year ...	160.0	172.5
Available for export and carryover .....	728.1	569.4
Deduct:		
Overseas clearances of wheat as grain, August .....	26.1	16.9
Exports of Canadian wheat to U.S., August .....	2.6	2.2
Total exports of wheat .....	28.6	19.2
Exports of wheat flour in terms of wheat, August .....	3.4	2.6 4/
Total exports of wheat and wheat flour .....	32.0	21.7
Balance on September 1 for export and carryover .....	696.1	547.7

1/ Preliminary

2/ Subject to revision

3/ Less than 50,000 bushels

4/ Adjusted for time lag in returns made by Customs

Assuming realization of the current estimate of production and estimated domestic requirements of 160 million bushels, supplies available for export and carryover during the current crop year will amount to 728.1 million as against 569.4 million in 1951-52. With supplies of the size indicated, some increase over current carryover stocks can be expected at the end of the 1952-53 crop year unless exports exceed by a wide margin the previous record of 407.6 million bushels set in 1928-29.

In addition to setting a record for quantity, this year's crop gives indication of being of high quality insofar as grade is concerned. Of the 4,627 carloads of new-crop wheat inspected by the Board of Grain Commissioners up to September 14, almost 87 per cent graded No. 1 or No. 2 Northern, while another one per cent graded No. 1 Hard. Offsetting to some extent the high grades of this year's crop is the relatively low protein content. A preliminary estimate of the protein content of the 1952 wheat crop by the Grain Research Laboratory



of the Board of Grain Commissioners places it at 12.5 per cent, compared with 13.6 per cent for last year's crop and also for the long-time average for Western Canada. Further details of the Board's preliminary estimate of the protein content of this year's crop may be found on Page 9 of this issue.

Reflecting the favourable progress made with this year's harvesting, marketing of Western Canadian wheat began in volume in the week ending August 28, three weeks earlier than last year. Deliveries from the beginning of the current crop year to September 18 amounted to 63.3 million bushels, considerably above last year's relatively small total of 23.9 million for the corresponding period. While scattered showers during the first three weeks of September delayed harvesting in many parts of the Prairies, near-ideal conditions during the last week of the month have permitted rapid progress to be made.

In view of prospects for a record crop together with the fact that storage space in many country elevators, particularly in Alberta and Saskatchewan, was at a premium, an initial delivery quota of 5 bushels per seeded acre was set for wheat at all delivery points. As in former years, quotas have been increased at individual points where storage and transportation conditions warranted such action. On September 23, however, three-quarters of the shipping points in the Western Division were still on the initial five-bushel quota.

Deliveries of new-crop wheat have increased stocks in country elevators over the July 31 level despite heavy rail shipments since that date. As of September 18, stocks in country elevators amounted to 99.4 million bushels compared with 94.9 million on July 31. This year's mid-September stocks in country elevators were almost double the 51.7 million bushels in those positions a year ago. Reflecting the all-out effort made by the railways to move grain to terminals, almost 16 million bushels of wheat were in transit in the Western Division on September 18 this year compared with 8.3 million and 7.8 million at the same time in 1951 and 1950, respectively. Lakehead stocks, at 29.7 million bushels, were only slightly lower than last year's 30.6 million and stocks in Eastern positions were also at about the same level as a year ago. However, stocks in West Coast terminals, at 9.1 million bushels, were considerably above last year's 3.6 million.

While exports of wheat as grain in August were below the preceding month's level, they were well above the usual August export movement. This year's August exports of wheat as grain amounted to 28.6 million bushels compared with 38.3 million in July and 19.2 million in August 1951. Some 8.5 million bushels of the August 1952 exports, representing almost 30 per cent of the total, went to the United Kingdom. Other major markets for Canadian wheat during the month, with quantities in millions of bushels, were as follows: Germany, 5.7; India, 2.8; Belgium, 2.8; the United States, 2.6 (of which 0.8 million was for milling in bond); Italy, 1.8; and Yugoslavia, 1.4. In addition, the equivalent of another 3.4 million bushels was exported in the form of wheat flour. Total exports of wheat and wheat flour in terms of wheat for the month amounted to 32.0 million bushels as against 21.7 million in August 1951.

Subject to the conditions noted above, the balance on September 1 remaining for export and carryover during the crop year was estimated at 696.1 million bushels as against 547.7 million on the same date last year.



Second Estimate of  
Production of Canada's  
1952 Grain Crops

The second estimate of the 1952 production of Canada's principal field crops, released on September 16, showed relatively little change from the first estimate published on August 15. On the basis of conditions at August 31, Canadian farmers are expected to harvest record crops of wheat and barley, a near-record crop of rye, and above-average outturns of most other field crops. While considerably more progress had been made with harvesting in the Prairie Provinces by August 31 this year than at the same time in 1951, wet cool weather in September has delayed ripening of late-seeded crops and has interfered with harvesting operations. Considerable quantities of grain remain to be harvested, particularly in Saskatchewan and Alberta, and an extended period of favourable weather is still required to ensure realization of current estimates.

September 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 2/	1951	1952	1951 3/	1952
	- acres -		- bushels -		- bushels -	
<u>CANADA</u>						
Winter wheat .....	703,000	650,000	28.0	31.8	19,696,000	20,670,000
Spring wheat .....	24,551,400	25,345,000	21.7	25.8	532,961,000	654,478,000
All wheat .....	25,254,400	25,995,000	21.9	26.0	552,657,000	675,148,000
Oats .....	11,896,600	11,062,400	41.0	42.9	488,191,000	474,169,000
Barley .....	7,839,800	8,477,400	31.3	34.8	245,218,000	294,636,000
Fall rye .....	711,600	757,700	15.8	19.6	11,277,000	14,832,500
Spring rye .....	415,000	499,600	15.3	19.4	6,370,000	9,670,000
All rye .....	1,126,600	1,257,300	15.7	19.5	17,647,000	24,502,500
Flaxseed .....	1,158,500	1,206,500	8.5	10.9	9,897,000	13,097,000
Mixed grains .....	1,524,300	1,570,100	44.9	40.3	68,509,000	63,268,000
<u>PRAIRIE PROVINCES</u>						
Wheat .....	24,385,000	25,204,000	21.7	25.8	529,000,000	651,000,000
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	34.9	234,000,000	284,000,000
Rye .....	1,046,800	1,176,700	15.3	19.5	15,980,000	22,940,000
Flaxseed .....	1,086,000	1,124,000	8.2	10.8	8,870,000	12,100,000

1/ Acreages rounded from 1951 Census of Agriculture.

2/ Based on annual June survey of acreage, includes all revisions to date.

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

Canada's 1952 wheat crop, currently estimated at the unprecedented level of 675 million bushels, exceeds by more than 100 million bushels the previous record of 567 million set in 1928. The increase of 19 million bushels over the first estimate of production is due principally to improved prospects in Saskatchewan where the wheat crop is now placed at 417 million bushels, larger than an average wheat crop for the whole of Canada. A crop of the size indicated would be 92 million bushels greater than this province's previous record wheat crop harvested last year. Prospects also improved in Manitoba where the wheat crop is now estimated at 58 million bushels, an increase of 3 million over the first estimate, and 6 million over the 1951 crop. In Alberta, however, damage from hail, frost and wet weather has contributed to a reduction of 4 million bushels from the first estimate. The current estimate of 176 million, the second largest crop on record, exceeds the 1951 outturn by 24 million bushels. The anticipated average yield per acre of wheat in the Prairie Provinces is placed at a near-record 25.8 bushels, with Manitoba averaging 24.5, Saskatchewan 25.4, and Alberta 27.5 bushels per acre. Relatively small quantities of winter wheat are included in the spring wheat estimates for all three Prairie Provinces.

In the remainder of Canada, wheat production is estimated at 24.1 million bushels, of which Ontario accounts for all but 2.7 million. Some 20.7 million of Ontario's estimated crop of 21.4 million is winter wheat, averaging 31.8 bushels per acre.

Farmers' Marketings Deliveries of wheat (both old and new-crop) by farmers in Western Canada from August 1 to September 18 of the current crop year amounted to 63.3 million bushels, considerably above last year's relatively small total of 23.9 million bushels for the corresponding period. Reflecting the favourable progress made with harvesting, deliveries of this year's crop began in volume in the week ending August 28, three weeks earlier than last year. Weekly marketings have been maintained at a fairly uniform level, ranging between 14.9 million and 12.5 million bushels in the four-week period ending September 18. Saskatchewan farmers marketed 39.2 million bushels or 62 per cent of the total for the period under review while farmers in Alberta and Manitoba marketed 13.3 million and 10.8 million bushels, respectively.

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

Week ending		Manitoba	Saskatchewan	Alberta	Total	Last Year
- bushels -						
August	7 ...	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
Totals .....		10,818,088	39,162,005	13,299,196	63,279,289	23,910,411

Delivery Quota Positions The Canadian Wheat Board's summary of the number of Western Division country shipping points in each quota group for wheat as of September 23 indicated that 1,541 points, or 74 per cent of the total, were still on the initial quota of 5 bushels per seeded acre. The next largest group, 488 points, were on an 8-bushels quota while only 49 points had a quota of 10 or more bushels per seeded acre.

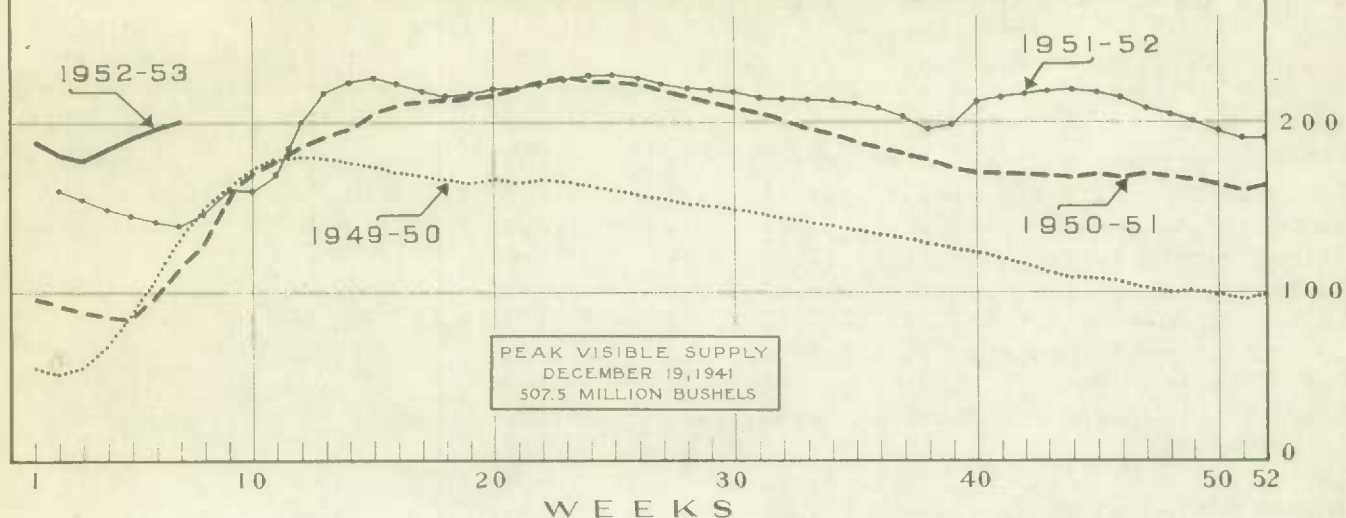
Summary of Elevator Shipping Points in Each Quota Group for Wheat in the Western Division as at September 23, 1952

Province	Quota in Bushels Per Seeded Acre				Open	Total
	5	8	10	12		
Ontario .....	-	-	-	-	2	2
Manitoba .....	144	206	16	10	-	376
Saskatchewan .....	963	149	2	1	-	1,115
Alberta .....	432	133	10	6	-	581
British Columbia ....	2	-	-	-	2	4
Totals .....	1,541	488	28	17	4	2,078

MILLION  
BUSHELS

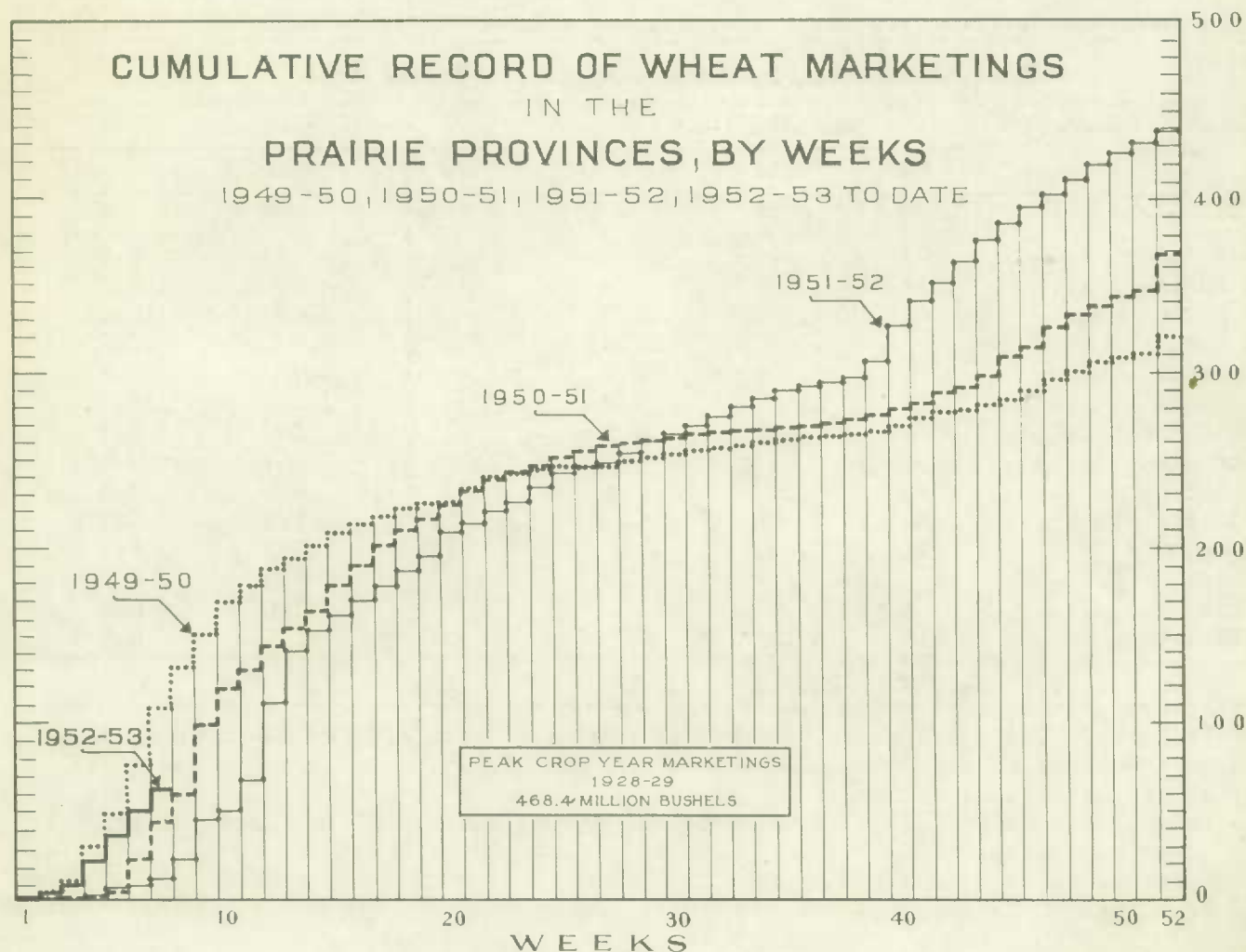
# WEEKLY VISIBLE SUPPLY OF CANADIAN WHEAT

1949-50, 1950-51, 1951-52, 1952-53 TO DATE



## CUMULATIVE RECORD OF WHEAT MARKETINGS IN THE PRAIRIE PROVINCES, BY WEEKS

1949-50, 1950-51, 1951-52, 1952-53 TO DATE



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



Visible Supply of Canadian Wheat, September 18, 1952, Compared with  
Approximately the Same Date, 1951 and 1950

Position	1952	1951	1950
- thousand bushels -			
Country elevators - Manitoba .....	7,607	3,775	2,488
Saskatchewan .....	61,918	33,467	30,734
Alberta .....	29,833	14,446	25,064
Totals .....	99,358	51,688	58,286
Interior private and mill elevators .....	5,725	3,157	3,600
Interior terminals .....	5,207	10,702	7
Vancouver-New Westminster .....	9,098	3,598	11,771
Prince Rupert .....	6	-	-
Churchill .....	1,106	1,414	344
Fort William-Port Arthur .....	29,653	30,606	16,364
In transit rail (Western Division) .....	15,994	8,316	7,812
Bay, Lake and Upper St. Lawrence ports ....	21,340	18,475	14,567
Lower St. Lawrence and Maritime ports ....	10,121	10,441	11,931
In transit lake .....	2,955	4,378	2,671
In transit rail (Eastern Division) .....	404	1,756	161
United States ports .....	655	2,540	-
Totals .....	201,623	147,071	127,516

Grading of Wheat Inspected, August, 1952 and 1951

Grade	August, 1952			August, 1951		
	New Crop	Total	Proportion 1/	New Crop	Total	Proportion 1/
	cars	cars	per cent	cars	cars	per cent
1 Northern ....	549	649	2.9	8	633	3.5
2 Northern ....	1,012	1,788	7.9	74	2,270	12.7
3 Northern ....	44	4,902	21.7	33	2,499	14.0
4 Northern ....	1	4,470	19.8	3	2,370	13.2
5 Wheat .....	-	5,106	22.6	-	3,722	20.8
6 Wheat .....	-	1,958	8.7	-	3,486	19.5
Feed Wheat ....	-	302	1.3	-	582	3.3
Garnet .....	1	11	5/	-	57	0.3
Amber Durum ...	51	367	1.6	2	644	3.6
Alberta Winter.	64	94	0.4	87	128	0.7
Toughs 2/ 3/...	11	2,483	11.0	26	1,217	6.8
Damps 2/ 4/....	-	6	5/	-	9	0.1
Rejected .....	1	311	1.4	-	140	0.8
All Others ....	15	118	0.5	-	130	0.7
Totals .....	1,749	22,565	100.0	233	17,887	100.0

1/ Proportion that each grade or group of grades of both old and new crop wheat is of the total inspections.

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.

5/ Less than .05 per cent.

Protein Content of  
Western Canadian 1952  
Hard Red Spring Wheat

In a press release dated September 1, 1952, the Grain Research Laboratory of the Board of Grain Commissioners for Canada issued a preliminary estimate of 12.5 per cent for the protein content of Western Canada's 1952 wheat crop. This preliminary estimate was based on analyses of 1,374 samples which came mainly from southern and central parts of Manitoba and Saskatchewan.

Average protein levels for these two provinces were: Manitoba, 12.5 per cent; and Saskatchewan, 13.0 per cent. Both figures are expected to drop as more wheat is harvested in northern areas where protein levels will probably be slightly lower. Past experience suggests that the protein level in Alberta will be between those of Manitoba and Saskatchewan.

Bearing in mind the probable drop in protein content that occurs as more northern wheat is harvested, the Laboratory expects a final level of 12.5 per cent for the whole crop. This figure compares with 13.6 per cent for last year's crop. The long-time average for Western Canadian wheat is also 13.6 per cent.

The lower protein content of this year's crop will cause a corresponding lowering of the baking strength. But, if harvesting weather continues to be good, the crop will be of high grade and high bushel weight. These advantages will give a crop of excellent milling quality, which will offset the decreased baking strength.

Wheat Shipments to  
the United States

Wheat shipments to the United States, either for re-export or retention for domestic use, from the beginning of the current crop year to September 18 amounted to 5,162,000 bushels, slightly lower than for the comparable period last year. About 62 per cent of this year's total to date was shipped by vessel to Buffalo.

Wheat Shipments to the United States by Destination  
August 1 to September 18, 1952  
Compared with Approximately the Same Period, 1951 and 1950

Destination	1952	1951	1950
- bushels -			
<u>By Vessel</u>			
Duluth-Superior .....	363,094	979,929	-
Milwaukee .....	-	120,426	-
Chicago .....	163,918	332,807	-
Huron .....	85,101	-	-
Erie .....	276,567	-	-
Buffalo .....	3,201,328	2,733,259	1,352,140
Oswego .....	-	514,005	-
Totals, Vessel .....	4,090,008	4,680,426	1,352,140
<u>By Rail</u>			
U.S.A. Seaboard Ports .....	-	-	20,194
Other U.S.A. Points .....	1,072,284	529,384	16,900
Totals, Rail .....	1,072,284	529,384	37,094
Totals, Shipments .....	5,162,292	5,209,810	1,389,234

Tough and Damp Grain Dried at Terminal Elevators, Western Division  
August 1 to September 18, 1952

Grain		Lakehead	Pacific Coast	Interior Points	Churchill	Total
- thousand bushels -						
Wheat 1/	Tough	259	1,155	1	-	1,415
	Damp	25	3	5	-	34
Durum Wheat	Tough	47	-	-	-	47
	Damp	3	-	-	-	3
Oats	Tough	155	19	2	-	176
	Damp	-	2	-	-	2
Barley	Tough	987	-	-	-	987
	Damp	198	-	-	-	198
Rye	Tough	15	-	-	-	15
	Damp	1	-	-	-	1
Flaxseed	Tough	52	-	-	-	52
	Damp	-	-	-	-	-
Totals	Tough	1,515	1,174	3	-	2,693
	Damp	226	5	5	-	237

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 September 18 amounted to 282.7 million bushels, the highest of any comparable period since 1945. Wheat shipments, at 150.3 million bushels, accounted for about 53 per cent of the current crop-year total to date. Shipments of oats and barley, at 61.8 million and 62.3 million bushels, respectively, maintained the record-breaking levels set earlier in the season. Barley shipments have been particularly heavy, more than twice as great as the largest movement in a comparable period in recent years. Rye shipments, at 5.0 million bushels, were slightly higher than last year and the 3.3 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  
September 18, 1952 and to Approximately the Same Date, 1942 to 1951

Year	Wheat	Oats	Barley	Rye	Flaxseed	Total
- thousand bushels -						
1942 .....	121,226	1,960	2,218	770	499	126,675
1943 .....	130,549	29,193	30,901	1,286	2,824	194,754
1944 .....	202,746	51,145	28,985	5,952	4,786	293,614
1945 .....	234,401	60,144	25,651	3,411	2,615	326,222
1946 .....	65,439	39,750	14,265	1,048	1,004	121,506
1947 .....	96,215	28,024	14,116	2,391	46	140,791
1948 .....	60,873	12,941	12,555	1,204	4,305	91,877
1949 .....	95,481	17,863	17,526	5,894	4,767	141,531
1950 .....	87,792	13,943	13,962	3,507	1,877	121,080
1951 .....	113,359	40,599	28,910	4,849	959	188,677
1952 .....	150,251	61,837	62,316	4,983	3,286	282,673



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

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

Rail shipments of wheat from the Lakehead continued in relatively low volume during August, the fifth consecutive month in which shipments were below the 200,000-bushel level. While the August 1952 shipments of 191,711 bushels were some 92,000 bushels less than for the corresponding month in 1951, they were about 78,000 greater than in July.

Distribution of the August, 1952 shipments by grade and destination is shown in the table below. The bulk of the month's shipments went to destinations in Quebec and consisted largely of 5 Wheat and 'toughs' of various grades. Only one carload of No. 2 Northern left the Lakehead during the month.

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

Grade	P.E.I.	N.S.	N.B.	Que.	Ont.
- bushels -					
2 Northern .....	-	-	-	-	1,500
5 Wheat .....	1,334	1,500	-	66,600	10,333
6 Wheat .....	-	583	-	-	-
Amber Durum .....	-	-	1,500	8,000	18,346
Toughs .....	500	1,500	167	59,750	7,750
All Others .....	833	-	750	5,207	5,558
Totals .....	2,667	3,583	2,417	139,557	43,487

Freight Assistance Shipments Claims filed for payment up to August 31, 1952 represent shipments of 16.5 million bushels of wheat from the Prairie Provinces to Eastern Canada and British Columbia under the freight assistance plan during the 1951-52 crop year. This preliminary total, subject to upward revision with the filing of additional claims, is already some 18 per cent over the revised total of 13.9 million bushels shipped under the plan in 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	546	214	1,293
May .....	6	25	83	57	476	557	185	1,389
June .....	5	28	69	50	421	584	129	1,286
July .....	1	18	42	31	396	382	12	883
Totals <u>1/</u> .....	64	254	817	567	6,081	6,331	2,393	16,505
Same period 1950-51								
Preliminary <u>2/</u> ....	36	229	684	433	5,044	4,623	2,075	13,124
Revised <u>1/</u> .....	38	233	711	458	5,153	4,771	2,569	13,934

In contrast to wheat shipments, preliminary data on freight-assisted millfeed shipments during 1952 represent a total of 517,076 tons, less than either the preliminary or revised totals for 1950-51.

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

Province	Aug. 1, 1951 to July 31, 1952	Aug. 1, 1950 to July 31, 1951	
	Preliminary <u>1/</u>	Preliminary <u>2/</u>	Revised <u>1/</u>
- tons -			
Newfoundland .....	2,874	2,810	2,993
Prince Edward Island	7,494	9,872	10,296
Nova Scotia .....	38,225	41,210	43,553
New Brunswick .....	33,620	34,753	36,424
Quebec .....	242,609	259,736	269,322
Ontario .....	147,141	160,470	171,700
British Columbia ...	45,113	41,166	49,793
Totals .....	517,076	550,017	584,081

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

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

Monthly Export Clearances, Etc., in Comparison with the Customs Exports of Wheat and Wheat Flour

Year and Month	Overseas Clearances of Canadian Wheat <u>1/</u>	Exports of Canadian Wheat to U.S.A. for Domestic Use and Grinding in Bond <u>2/</u>	Customs Exports of Canadian Wheat Flour <u>3/</u>	Total	Customs <u>4/</u> 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>5/</u></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	5,735	44,010	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	51,678	356,400	358,803
<u>1952-53 <u>5/</u></u>					
August .....	26,089	2,559	3,364	32,011	38,946

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

2/ Data on shipments for grinding in bond 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 year 1950-51 and August, 1951 to May, 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, 1952-53

Destination	May	August	
	Wheat Flour 1/2/	Wheat Flour 2/	Wheat 3/
		- bushels -	
<u>COMMONWEALTH COUNTRIES</u>			
United Kingdom .....	2,065,036	1,535,895	8,463,266
<u>Africa</u>			
British East Africa .....	576	-	-
Gambia .....	-	549	-
Gold Coast .....	873	-	-
Nigeria .....	7,452	15,363	-
Sierra Leone .....	5,346	3,465	-
<u>Asia</u>			
Aden .....	25,272	-	-
British Malaya .....	71,257	31,536	-
Hong Kong .....	68,427	48,654	5,000
India .....	-	-	2,782,090
<u>Europe</u>			
Gibraltar .....	4,361	15,376	-
<u>North America</u>			
Bahamas .....	20,471	27,454	-
Barbados .....	55,013	34,636	-
Bermuda .....	11,610	9,086	-
British Honduras .....	7,101	4,689	-
Jamaica .....	233,766	240,894	-
Leeward and Windward Islands .....	130,581	80,474	-
Trinidad and Tobago .....	272,043	95,207	-
<u>South America</u>			
British Guiana .....	60,480	104,782	-
<hr/>			
Totals, Commonwealth Countries .	3,039,665	2,248,060	11,250,356

Exports of Canadian Wheat and Wheat Flour, 1952-53

Destination	May	August	
	Wheat Flour 1/2/	Wheat Flour 2/	Wheat 3/
- bushels -			
<u>FOREIGN COUNTRIES</u>			
<u>Africa</u>			
Azores and Madeira .....	4,932	-	-
Belgian Congo .....	18,662	3,524	-
Canary Islands .....	1,377	-	-
Egypt .....	2,255	32,994	-
French Africa .....	5,112	3,443	-
Liberia .....	576	1,084	-
Morocco .....	31,257	20,232	-
Portuguese Africa .....	2,250	-	-
Tripoli .....	109,283	-	-
<u>Asia</u>			
Arabia .....	25,371	3,438	-
China .....	3,960	-	-
Indonesia .....	76,297	3,443	-
Israel .....	342,788	-	-
Japan .....	59,859	34,965	-
Korea .....	9,184	-	-
Lebanon .....	11,385	6,921	364,000
Philippine Islands .....	229,995	395,807	-
Portuguese Asia .....	34,628	-	-
Siam .....	27,531	9,473	-
Syria .....	-	49	-
<u>Europe</u>			
Belgium .....	-	-	2,772,313
Denmark .....	230	-	-
France .....	-	-	338,987
Germany .....	-	-	5,682,384
Greece .....	113	-	698,163
Iceland .....	18,877	-	-
Ireland .....	-	-	421,621
Italy .....	835,353	3,424	1,792,867
Netherlands .....	-	-	944,938
Switzerland .....	-	-	240,922
Yugoslavia .....	-	1,723	1,418,500
<u>North America</u>			
Alaska .....	-	9	-
Costa Rica .....	70,771	75,519	-
Cuba .....	111,285	6,777	1,000
Dominican Republic .....	7,115	26,735	-
El Salvador .....	13,914	27,756	-

# Exports of Canadian Wheat and Wheat Flour, 1952-53

Destination	May	August	
	Wheat Flour 1/2/	Wheat Flour 2/	Wheat 3/
<hr/>			
<u>FOREIGN COUNTRIES</u>	- bushels -		
<hr/>			
<u>North America</u>			
French West Indies .....	1,512	1,282	-
Guatemala .....	13,694	13,131	-
Haiti .....	43,717	12,551	-
Netherlands Antilles .....	13,360	11,151	-
Nicaragua .....	1,607	8,775	-
Panama .....	18,711	27,981	-
St. Pierre and Miquelon .....	1,075	1,656	-
United States			
Flour in terms of wheat .....	5,998	5,319	-
For grinding in bond 4/ .....	-	-	804,514
For domestic use 4/ .....	-	-	1,754,041
Virgin Islands .....	-	2,295	-
<u>Oceania</u>			
Hawaii .....	-	117	-
<u>South America</u>			
Argentina .....	-	4	-
Chile .....	-	-	163,000
Colombia .....	28,678	2,295	-
Ecuador .....	8,262	37,076	-
Surinam .....	4,036	265	-
Venezuela .....	499,950	334,557	-
<hr/>			
Totals, Foreign Countries .....	2,694,960	1,115,771	17,397,250
<hr/>			
Totals, Exported .....	5,734,625	3,363,831	28,647,606

- 1/ Exports for May, 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 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.

## Adjustments to the July Export Figures as Published in the August issue of The Wheat Review

	Wheat bushels
Add Switzerland .....	94,789
Add Netherlands .....	18,445
Deduct Belgium .....	113,234



Initial Payment to Producers The Canadian Wheat Board announced on August 25 its fixed minimum carlot prices for wheat, established in accordance with the provisions of The Canadian Wheat Board Act, 1935, as amended. The price of No. 1 Northern Wheat was fixed by the provisions of Order in Council P.C. 3381 dated June 23, 1952, made pursuant to The Canadian Wheat Board Act as amended, and the remaining prices have been fixed by the Board in relation to the price for No. 1 Northern.

Canadian Wheat Board Price List for Wheat, 1952-53,  
(In Carload Lots, Basis in Store Fort William-Port Arthur or Vancouver)

Grade	Straight	Tough 1/	Rejected A/C Sprouted 2/	Damp 3/
No. 1 Hard .....	\$1.40	\$1.36	-	-
No. 1 Northern .....	1.40	1.36	\$1.30	\$1.24
No. 2 Northern .....	1.37	1.33	1.27	1.21
No. 3 Northern .....	1.34	1.30	1.24	1.18
No. 4 Northern .....	1.26	1.22	1.16	1.10
No. 5 Wheat .....	1.16	1.12	1.07	1.00
No. 6 Wheat .....	1.06	1.02	1.01	.92
Feed Wheat .....	1.00	.96		.86
No. 4 Special .....	1.26	1.22	1.16	1.10
No. 5 Special .....	1.16	1.12	1.07	1.00
No. 6 Special .....	1.06	1.02	1.01	.92
No. 1 C.W. Amber Durum .....	1.40	1.36	1.30	1.24
No. 2 C.W. Amber Durum .....	1.37	1.33	1.27	1.21
No. 3 C.W. Amber Durum .....	1.30	1.26	1.20	1.14
No. 4 C.W. Amber Durum .....	1.26	1.22	1.16	1.10
No. 5 C.W. Amber Durum .....	1.16	1.12	1.07	1.00
No. 6 C.W. Amber Durum .....	1.06	1.02	1.01	.92
No. 1 C.W. Garnet .....	1.34	1.30	1.24	1.18
No. 2 C.W. Garnet .....	1.31	1.27	1.21	1.15
No. 3 C.W. Garnet .....	1.28	1.24	1.18	1.12
No. 1 Alberta Red Winter ...	1.37	1.33	1.27	1.21
No. 2 Alberta Winter .....	1.34	1.30	1.24	1.18
No. 3 Alberta Winter .....	1.30	1.26	1.20	1.14
No. 4 Alberta Winter .....	1.26	1.22	1.16	1.10
No. 1 Soft White Spring ....	1.35	1.31	1.25	1.19
No. 2 Soft White Spring ....	1.32	1.28	1.22	1.16
No. 3 Soft White Spring ....	1.28	1.24	1.18	1.12
No. 4 Soft White Spring ....	1.25	1.21	1.15	1.09
No. 1 Mixed Wheat .....	1.16	1.12	1.09	1.02
No. 2 Mixed Wheat .....	1.11	1.07	1.04	.97
No. 3 Mixed Wheat .....	1.09	1.05	1.02	.95
No. 4 Mixed Wheat .....	1.06	1.02	.99	.92
No. 5 Mixed Wheat .....	1.16	1.12	1.09	1.02
No. 6 Mixed Wheat .....	1.11	1.07	1.04	.97
No. 1 C.W. Mixed Grain .....	.95	.91	.88	.81

1/ Moisture content for wheat other than durum, 14.6 per cent to 17 per cent inclusive; for durum wheat, 14.9 per cent to 17 per cent inclusive.

2/ Maximum proportion of sprouts allowed in principal grades: No. 1 Northern, none; No. 2 Northern, 1 1/2 per cent; No. 3 Northern, 5 per cent; No. 4 Northern and No. 5, 8 per cent; No. 6, 12 per cent. 3/ Moisture content over 17 per cent.

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

Class and Grade	Week ending			
	Aug. 30	Sept. 6	Sept. 13	Sept. 20
- cents and eighths per bushel -				
<u>Initial Payment to Producers 1952-53 Pool</u>				
1 Hard .....	140	140	140	140
1 Northern .....	140	140	140	140
2 Northern .....	137	137	137	137
3 Northern .....	134	134	134	134
4 Northern .....	126	126	126	126
5 Wheat .....	116	116	116	116
6 Wheat .....	106	106	106	106
Feed Wheat .....	100	100	100	100
<u>Domestic and Export <sup>1/</sup></u>				
(International Wheat Agreement)				
1 Hard .....	173/1	172/7	172/6	172/6
1 Northern .....	173/1	172/7	172/6	172/6
2 Northern .....	171/1	170/7	170/6	170/6
3 Northern .....	169/1	168/7	168/6	168/6
4 Northern .....	163/1	162/7	162/6	162/6
5 Wheat .....	156/1	155/7	154/5	152/6
6 Wheat .....	152/1	151/7	151/6	151/6
Feed Wheat .....	147/1	146/7	146/6	146/6
1 C.W. Garnet .....	171/1	170/7	170/6	170/6
2 C.W. Garnet .....	170/1	169/7	169/6	169/6
3 C.W. Garnet .....	167/1	166/7	166/6	166/6
1 Alberta Red Winter .....	173/1	172/7	172/6	172/6
2 Alberta Winter .....	171/1	170/7	170/6	170/6
3 Alberta Winter .....	169/1	168/7	168/6	168/6
1 C.W. Amber Durum .....	173/1	172/7	172/6	172/6
2 C.W. Amber Durum .....	171/1	170/7	170/6	170/6
3 C.W. Amber Durum .....	170/1	169/7	169/6	169/6
<u>Export - Class II</u>				
1 Hard .....	217/1	215/5	218/6	218/1
1 Northern .....	217/1	215/5	218/6	218/1
2 Northern .....	215/1	213/5	216/6	216/1
3 Northern .....	213/1	211/5	214/6	214/1
4 Northern .....	207/1	205/5	208/6	208/1
5 Wheat .....	162/1	161/7	160/5	158/6
6 Wheat .....	158/1	157/7	157/6	157/6
Feed Wheat .....	153/1	152/7	152/6	152/6
1 C.W. Amber Durum .....	224/1	222/5	227	228/1
2 C.W. Amber Durum .....	222/1	220/5	225	226/1
3 C.W. Amber Durum .....	221/1	219/5	224	225/1

<sup>1/</sup> Plus 6 cents carrying charge.

## CANADIAN FLOUR MILLING SITUATION

Production Wheat flour production reported by Canadian mills for August 1952 amounted to some 1,943,000 barrels, slightly above the preceding month's output and about 15 per cent higher than the August 1951 production of 1,691,000 barrels. The ten-year (1942-1951) average production for August was 1,899,900 barrels. Mills reporting operations during August this year had a rated capacity of 95,895 barrels and, on the basis of a 26-day working period, 77.9 per cent of this rated capacity was effective.

Wheat milled for flour during August 1952 amounted to 8.8 million bushels as against 7.7 million for the same month last year. Almost 8.0 million bushels of the wheat milled for flour during August this year was Western Canadian spring wheat (other than durum). Most of the balance consisted of Ontario winter wheat (446,500 bushels) and durum wheat (205,700 bushels).

Exports Exports of Canadian wheat flour during August, according to preliminary Customs returns, amounted to 747,518 barrels (3,364,000 bushels of wheat equivalent). Flour shipments during the month were reported to 49 countries and colonies, 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 (396), Venezuela (335), and Jamaica (241).

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

Crop Year	Wheat Milled for Flour	Wheat Flour	
		Production	Exports <sup>1/</sup>
	- 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 <sup>2/</sup> .....	104,553,678	22,854,662	11,484,046
<u>1952-53</u> <sup>2/</sup>			
August .....	8,809,102	1,943,274	747,518

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

<sup>2/</sup> Wheat milled for flour and wheat flour production subject to revision.



# UNITED STATES SITUATION

Supply Position Based on conditions at September 1, this year's United States wheat crop was estimated at 1,298.3 million bushels, virtually unchanged from the August estimate. Total domestic supplies, consisting of the new crop and the July 1, 1952 carryover of 253.9 million bushels, amount to 1,552.2 million, the third largest in history, and almost 170 million greater than in 1951-52. Domestic wheat supplies have already been supplemented by imports of some 5 million bushels and it is anticipated that sizable quantities of Canadian wheat of feeding quality will continue to be imported during the remainder of the crop year.

## United States Wheat Supplies

Item	1952-53 <u>1/</u>	1951-52
	- million bushels -	
Carryover at July 1 .....	253.9	396.2
New crop .....	1,298.3 <u>2/</u>	987.5
Total estimated domestic supplies .....	1,552.2	1,383.7
Imports of wheat for domestic use, July—August .....	5.1	4.3
Total estimated supplies <u>3/</u> .....	1,557.3	1,388.0
Less estimated domestic requirements for crop year <u>4/</u> ....	700.0	686.7
Available for export and carryover .....	857.3	701.3
Deduct:		
Exports of wheat as grain, July—August .....	40.0	66.0
Exports of wheat flour and macaroni in terms of wheat, July—August .....	6.2	5.6
Total exports of wheat, wheat flour and macaroni ....	46.2	71.6
Balance on September 1 for export and carryover .....	811.1	629.7

1/ Preliminary. 2/ Official estimate as of September 1, 1952. 3/ Excluding imports for September-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.

Estimated domestic requirements for 1952-53 are placed at 700 million bushels, somewhat higher than the 1951-52 level. On the basis of estimated supplies and domestic requirements, supplies available for export and carryover during the current crop year amount to 857 million bushels as against 701 million in 1951-52. Exports of wheat as grain during the first two months of the current crop year amounted to 40.0 million bushels while the equivalent of another 6.2 million was exported in the form of wheat flour and macaroni. Comparable figures for July and August last year were 66.0 million and 5.6 million bushels, respectively. The balance on September 1, 1952 remaining for export and carryover was estimated at 811.1 million bushels as against 629.7 million on the same date last year.

Outlook for  
Wheat Supplies  
and Prices

The following summary of the outlook for wheat supplies and prices in the United States has been extracted from the August-September issue of The Wheat Situation.

"Wheat supplies in prospect for this year and next probably will exceed domestic and export requirements and increases in the year-end carryover stocks are expected for the 1952-53 marketing year and probably also for the 1953-54 year. This year, supplies are estimated to be the third largest in history and the carryover next July 1 is expected to be about double the 254 million bushels of mid-1952.

The national wheat production goal for the 1953 harvest calls for 72 million seeded acres. This compares with 77.5 million acres seeded for the 1952 crop and the 1942-51 average of 70.6 million acres. Average yields on this goal acreage would result in a crop of about 1,080 million bushels. This would be enough to meet anticipated export and domestic requirements and probably add some to reserves on July 1, 1954. In some years growers have exceeded the acreage goals. If goals are exceeded in 1953 the increase in wheat supplies, at average yields, would add to the July 1, 1954 carryover about 15 million bushels for each additional one million acres seeded.

During the current marketing year, prices of wheat are expected to average slightly below the effective loan level—the support price of \$2.20 minus a storage deduction. Cash wheat prices have advanced since late June but are expected to continue generally below the effective support until late fall or early winter. Recent legislation provides for mandatory 90 per cent of parity support prices again for the 1953 crop, which means that wheat prices in 1953 may not be much different than those now being realized."

Estimate of 1952  
Wheat Crop Unchanged  
at 1,298 Million Bushels

According to the Crop Reporting Board of the Bureau of Agricultural Economics, production of all wheat in the United States, based on conditions at September 1, is estimated at 1,298 million bushels, virtually unchanged from the August 1 estimate. The current crop is the second largest of record and exceeds 1951 production by 311 million bushels and the average by 214 million bushels. Harvest of spring wheat in the Northern producing areas advanced rapidly and under generally favourable conditions during August and was more advanced on September 1 than on that date in the 1950 and 1951 seasons. Harvest of winter wheat was virtually completed in all but a few northernmost areas by September 1. The 1952 prospective all wheat production includes 1,063 million bushels of winter wheat for which the last estimate was made as of August 1. The indicated national yield of 18.4 bushels is 2.3 and 1.2 bushels, respectively, above last year and the average.

All spring wheat prospective production is estimated at 235,705,000 bushels based on condition of the crop and yields reported as of September 1. This reflects a very slight downward change from the August 1 forecast. Loss of production in the Dakotas and Minnesota, due primarily to rust, was practically offset by improved prospects in Washington, Oregon, Montana and a few other States. The indicated yield per harvested acre at 11.7 bushels is 4.1 and 4.2 bushels lower than the 1951 and average yields, respectively.

Durum wheat production is now forecast at 21,593,000 bushels, down nearly 8 per cent from a month ago. Current prospects point to a crop nearly 40 per cent smaller than the 35,820,000 bushel crop of 1951 and 43 per cent smaller than the 10-year average production of 37,950,000 bushels. Black stem rust was concentrated



mostly in the Durum producing area this year and reduced yields of the late crop materially from those indicated a month ago. However, most early maturing fields produced fairly good crops with test weights average or above. In North Dakota about 80 per cent of the crop was harvested by the first of September. Indicated yields per acre were lower than a month ago in each of the producing States with North Dakota down 0.5 bushel, Minnesota down 1.0 bushel and South Dakota down 2.5 bushels. The overall yield is indicated at 10.0 bushels per acre compared with 10.8 bushels a month ago, 14.2 bushels in 1951 and an average yield of 15.0 bushels.

Other spring wheat production is now estimated at 214 million bushels slightly above the August 1 forecast, but 92 million smaller than the 1951 crop and 33 million bushels below average. Prospective production is below August 1 in Minnesota, South Dakota, Wisconsin, and Utah but improved or held steady in all other States. Crop deterioration due to rust was limited mostly to the late maturing grain in the eastern portion of the Dakotas and western Minnesota. In North Dakota approximately 85 per cent of the hard wheat was threshed or combined by September 1. Early harvested grain was of better quality and test weight than later harvested grain, especially in the area where rust became a factor. Light and timely showers during the first part of August continued to improve spring wheat yield prospects in Montana and was a factor offsetting the ill effects of rust in North Dakota. Good rains a month to six weeks before harvest in Washington and Oregon, with favourable growing weather later, improved crop prospects. Harvest is nearly complete in Washington and at lower elevations in Idaho where harvest has also started at the higher elevations. The yield per acre of other spring wheat is estimated at 11.9 bushels compared with 16.0 bushels in 1951 and the average of 16.1 bushels.

Minimum Price Support      Secretary of Agriculture Charles F. Brannan announced on  
Announced for              September 9 a national average price support of not less  
1953-Crop Wheat              than \$2.21 a bushel for 1953-crop wheat. This is 90 per  
   cent of the August 15, 1952 wheat parity price of \$2.46.  
Support for 1952-crop wheat, now eligible for loan and purchase agreement, is a national average of \$2.20 a bushel.

A minimum support price was announced in accordance with "forward pricing" provisions of the Agricultural Act of 1949. If the wheat parity price as of July 1, 1953 (the beginning of the marketing year for the 1953 crop) is higher, the support level will be increased to reflect 90 per cent of the wheat parity price at that time. In no event will the support be lower than the \$2.21 national average.

The 1953-crop wheat will be supported through farm-storage and warehouse-storage loans and by the offer of the Commodity Credit Corporation to purchase wheat delivered by producers under purchase agreements. Loans and purchase agreements will be available from time of harvest through January 31, 1954. The loans will mature April 30, 1954, or earlier on demand. Producers who elect to deliver wheat under purchase agreements must notify their county Production and Marketing Administration committee within a 30-day period ending April 30, 1954.



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
August 25, 1952 .....	235 1/4	August 25, 1952 .....	235 1/4
26 .....	231 1/4 - 237 3/4	26 .....	235 3/8
27 .....	232 1/2	27 .....	235 5/8
28 .....	232 - 237 1/2	28 .....	234 5/8
29 .....	232 - 238	29 .....	236 1/4
September 1 .....	Labour Day	September 1 .....	Labour Day
2 .....	234 - 241	2 .....	237
3 .....	236 1/2 - 241 1/2	3 .....	237 7/8
4 .....	226 1/4 - 236 1/2	4 .....	237 1/2
5 .....	236 - 246 3/4	5 .....	238
8 .....	210 3/4	8 .....	237 1/2
9 .....	238 - 246	9 .....	237 5/8
10 .....	238 1/2 - 242 1/2	10 .....	236 5/8
11 .....	244 1/4 - 245 3/4	11 .....	236
12 .....	236 1/2 - 238 1/2	12 .....	236 1/2
15 .....	237	15 .....	235 7/8
16 .....	236 - 246	16 .....	235 7/8
17 .....	236 1/2 - 244	17 .....	237 1/2
18 .....	238 3/4	18 .....	239 3/4
19 .....	237 1/2 - 248 1/4	19 .....	240 - 241
22 .....	242 1/2 - 247 3/4	22 .....	240 1/8 - 241 1/8
23 .....	238 1/2 - 249 1/4	23 .....	239 5/8 - 240 5/8
24 .....	238 - 246 3/4	24 .....	239 - 240

Chicago Wheat Futures, High Points of Closing

Date	September	December	March	May	July
	- cents and eighths per bushel -				
August 25, 1952 .....	230/1	236/7	242/3	243/5	239/2
26 .....	229/7	236/6	242/3	243/5	239/1
27 .....	230/3	237/1	242/6	244	239/6
28 .....	229/3	236	241/6	243	238/6
29 .....	230/7	237/4	243	244/3	240/1
September 1 .....		Labour Day			
2 .....	232	238/7	244/1	245/2	241/2
3 .....	231/7	239	244/3	245/2	241/2
4 .....	231/2	238/3	243/6	244/6	240/6
5 .....	231/2	238/4	243/7	244/6	240/6
8 .....	231/2	238/4	243/7	244/7	241
9 .....	232/3	239/1	244/3	245	240/6
10 .....	231/1	238/1	243/2	243/7	239/5
11 .....	231/1	237/7	243/2	243/6	239
12 .....	231/4	238/2	242/3	243/6	238/6
15 .....	231/1	237/7	243/1	243/4	238/6
16 .....	230/5	237/1	242/6	243/2	238/5
17 .....	230	237/1	242/7	243/5	239
18 .....	230	237/2	243/1	243/6	239/1
19 .....		237/4	243/2	244	239/4
22 .....		237	242/6	243/7	239/5
23 .....		236/2	242/2	243/2	238/2
24 .....		235/1	241/2	242/6	238/4

## ARGENTINE SITUATION

Supply Position    Some improvement in Argentina's current crop year statistical supply position of wheat has resulted from a recent official revision of the December 1, 1951 carryover figure and the importation of wheat under a barter arrangement. The December 1, 1951 carryover figure, now estimated at 18.4 million bushels, together with the 1951 crop of 75.3 million, makes total domestic supplies of 93.7 million bushels. The addition of 7.2 million bushels of imported wheat (only 1.3 million of which had been imported up to September 15) will increase total wheat supplies for 1951-52 to just over the 100-million bushel level. This is less than half last year's supplies of 220.4 million bushels and is also less than normal domestic requirements of some 125 million. In view of the extremely short supply situation, it is anticipated that there will be no carryover of old-crop wheat at November 30, and that mills will commence grinding new wheat as soon as available, possibly in November.

### Argentine Wheat Supplies

Item	1951-52 <u>1/</u>	1950-51
	- million bushels -	
Carryover at beginning of crop year (December 1) .....	18.4 <u>2/</u>	7.3
New crop .....	75.3	213.1
Total estimated domestic supplies .....	93.7 <u>2/</u>	220.4
Imports of wheat for domestic use .....	7.2 <u>3/</u>	-
Total estimated supplies .....	100.9	220.4
Less estimated domestic requirements for crop year ...	97.1	106.8 <u>2/</u>
Available for export and carryover .....	3.8	113.6 <u>2/</u>
Deduct:		
Exports of wheat as grain, December 1—August 31 ....	3.8	81.4
Exports of wheat flour in terms of wheat, December 1—August 31 .....	<u>4/</u>	<u>4/</u>
Total exports of wheat and wheat flour .....	3.8	81.4
Balance on September 1 for export and carryover .....	-	32.2

1/ Preliminary.    2/ Revised.    3/ To be imported under barter arrangement in exchange for Argentine corn. About 1.3 million bushels of this amount have already been imported.    4/ 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 September 15, 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 Moisture conditions continue very satisfactory for all grain crops throughout every zone. Over the week-end of September 13th copious rain fell in the provinces of Santa Fé and Córdoba which was very timely for the wheat crop in the northern belt. This moisture added to present reserves will carry the grain crops well into October.

Condition of the pastures throughout is generally good and they are recovering from the drought of last year and winter frosts. Even in the west of the province of Buenos Aires and the province of Eva Perón (ex La Pampa), which have suffered from drought for three years, pastures are in a better condition than they have been for some time.

Wheat 1952-53 Crop It would appear that Argentina has about 6.5 million hectares (16.1 million acres) planted to wheat, 38 per cent above last year and about equal to 1950-51 sowings. This estimate is based on trade opinion and on the writer's observations made during a trip in the first week of September through the southern grain zone, southwest and south of the province of Buenos Aires and a recent visit to the northern grain zone.

The condition of the crop is uniformly from very good to excellent in virtually all parts and the general opinion is that there is enough moisture to make a fair crop and with some rain the end of September and next month yields will be high. The plants are extremely healthy, well stooled and the principal danger is in late frost. The common expression throughout is that the wheat crop is "inmejorable", or impossible to improve upon at the present time.

Under these conditions and on this acreage a crop of 6.5 million tons (238.8 million bushels) is very likely and even 7 million tons (257.2 million bushels) is possible. This would give Argentina an export surplus of around 3 million tons (110.2 million bushels).

Several factors have contributed to the increase in sowings this year. An increase over last year was, of course, expected as because of drought producers could not prepare land for grain. However, the fact that sowings have reached the 1950-51 level, in which year there was the largest acreage since 1946-47 merits some further explanation. The official price of 50.00 pesos per 100 kilos (\$2.72 per bushel) was attractive and the Government's endless propaganda to increase production undoubtedly had its influence. In the drought-stricken areas cattle were moved out last year and the ranches could not be restocked because of the scarcity and high prices for feeder cattle. Therefore more grazing land was put into grain. In the southern regions of Buenos Aires province sheep are important and producers refused to sell wool at low prices. Since they could borrow money freely from the official banks to sow grain they used these sums for finances and kept the wool for speculation, hence another factor increasing grain acreages.

The following table shows Argentine wheat production in recent years:

	Thousand acres	Thousand bushels
10-year average ended 1939-40 .....	19,009	232,845
1949-50* .....	14,059	189,010
1950-51* .....	16,189	212,966
1951-52* .....	11,595	75,325
*Official estimates		



Wheat-for-Corn Barter Deal Imports of wheat under the triangular barter deal whereby 254,000 tons (9,999,000 bushels) of corn are being exchanged for 196,000 tons (7,202,000 bushels) of wheat from the United States are under way, and to date about 36,000 tons (1,323,000 bushels) have arrived in Argentina. In this connection it is understood that the barley from North Africa which is included in the deal has been sold to Western Germany, payment in "clearing" dollars which, against a discount of 7 per cent, will be converted into "free" dollars.

However, despite the importation of wheat, no present improvement in the quality of bread can be expected in Argentina. In fact, more stringent measures are being taken by the authorities to enforce the minimum extraction rate of 85 per cent and the Government have opened a campaign for the consumption of wholemeal bread and the use of corn flour and meal for food products. This would suggest that the high extraction rate may continue even after the new crop is available in order to make larger quantities available for export. In recent months I.A.P.I. has acquired 100,000 tons of millet of which all but 7,000 tons have been milled for mixing with wheat flour.

Bran The Ministry of Industry and Commerce announced that all stocks and production of bran is to be placed at the disposal of the Ministry of Agriculture for manufacturing poisoned bait for the control of locusts. This ruling is to remain in effect until November 30.

Land Rents Modified A recent decree modifying land rents stipulates that where these are payable with a percentage of the crop these payments shall be reduced by 40 per cent in the case of cereals and sunflower seed and 50 per cent for corn, based on contracts drawn up in 1943. On contracts where a tenant, in addition to the land, uses the landlord's machinery, etc., the reduction will be 11 per cent on the payment of the tenant's share of the 1952-53 grain harvest.

On the other hand, cash rent contracts signed prior to May 21, 1950 are subject to an increase of 15 per cent as from June 1, 1952.

This measure will to some extent overcome the anomaly created by the steady increase in the value of the crops in terms of pesos. This resulted in some landowners obtaining disproportionately high incomes whereas those renting their land on a cash basis were suffering from increased costs while not deriving benefit from the enhanced value of the crops. Establishing as it does a greater reduction on payments with corn, the ruling recognizes that the price of this grain has risen to a greater extent than in the case of wheat and other cereals. It will be recalled that the official producer price for 1952-53 crop corn has been established at 45.00 pesos per 100 kilos (\$2.29 per bushel) compared to 5.57 pesos per 100 kilos which was the prevailing price in 1943, and that for wheat at 50.00 pesos per 100 kilos (\$2.72 per bushel) compares with 8.04 pesos in 1943, on the basis of which year these contracts are to be modified.

Grain Shipments Shipments of corn to France under the barter deal for wheat contribute 37,924 metric tons (1.5 million bushels) to the month's total grain shipments of 61,091 tons. The United Kingdom and Austria received 9,800 tons (386,000 bushels) and 5,095 tons (200,600 bushels) of corn respectively, the balance of the total of 57,819 tons (2.3 million bushels) being shipped to Belgium and Finland. Apart from this movement of corn there were no other grain shipments during the month with the exception of 700 tons

(27,600 bushels) of flax to Chile and 2,500 tons (162,100 bushels) of oats to Finland.

Cumulative shipments of grain from Argentina during the first eight months of the year totalled 754,697 tons, of which more than 50 per cent comprised corn. Only 61,656 tons (2.3 million bushels) of wheat has been exported since the beginning of the year as against 2,080,594 tons (76.4 million bushels) in the corresponding period of 1951. Flax shipments were down to 24,959 tons (982,600 bushels) compared to 162,557 tons (6.4 million bushels) in the corresponding eight-month period last year.

During the first eight months of 1952 France was Argentina's principal customer, receiving 191,717 tons of grain, of which 175,277 tons (6.9 million bushels) were corn and the balance comprised flax. Sweden purchased 160,907 tons and Germany followed with a total of 103,685 tons.

The following table gives Argentine grain shipments by destination for the first eight months of 1952:

Argentine Grain Shipments, January—August, 1952

Destination	Wheat	Corn	Flax	Oats	Rye	Barley
- thousand bushels -						
Austria .....	-	779	-	-	-	-
Belgium .....	-	1,845	71	63	146	-
Brazil .....	1,049	-	-	6	-	-
Chile .....	-	264	49	-	-	-
Denmark .....	-	-	-	-	-	607
Finland .....	-	146	-	162	1,544	-
France .....	-	6,900	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 ...	-	1,024	7	-	-	-
Yugoslavia .....	-	289	-	-	-	-
Totals .....	2,265	16,189	983	2,647	4,385	4,806

## AUSTRALIAN SITUATION

Supply Position      Exports of wheat as grain from Australia during the December-August period of the current crop year amounted to 34.0 million bushels, little more than half as much as the 66.9 million exported during the comparable period of 1950-51. The principal markets for this year's Australian wheat exports for the period under review, with quantities in millions of bushels, were the United Kingdom (13.4); New Zealand (6.8); India (5.4); the Netherlands (2.2); Italy (1.5); and Rhodesia (1.2). Exports of wheat flour in terms of wheat for the same period amounted to 26.7 million bushels as against 32.7 million last year. The main outlets for this year's wheat flour exports to date have been Ceylon, Malaya, the United Kingdom, Indonesia and India. The balance remaining on August 31, 1952 for export and carryover was estimated at 36.2 million bushels, compared with 44.2 million a year ago.

### Australian Wheat Supplies

Item	1951-52 1/	1950-51 2/
	- million bushels -	
Carryover at November 30 (including flour as wheat)...	19.5	43.9
New crop .....	161.4	184.2
Total estimated supplies .....	180.9	228.1
Less estimated domestic requirements for crop year ...	84.0	84.3
Available for export and carryover .....	96.9	143.8
Deduct:		
Exports of wheat as grain, December 1—August 30 ...	34.0	66.9
Exports of wheat flour in terms of wheat, December 1—August 30 .....	26.7	32.7
Total exports of wheat and wheat flour .....	60.7	99.6
Balance on August 31 for export and carryover .....	36.2	44.2

1/ Preliminary.      2/ Subject to revision.

Australian Cable      The following cable, dated September 19, 1952, has been received from the Agricultural Secretary for Canada in Melbourne:

"Australian wheat stocks at September 13th totalled 50,304,000 bushels. Wheat exports from December 1st 1951 to September 13th totalled 35,287,000 bushels, with shipments during preceding six weeks mainly to the United Kingdom, New Zealand and Eire. Flour exports for the same period were 538,599 long tons with 27,449 to Ceylon, 13,251 to Malaya, 9,684 to Indonesia and 7,428 to the United Kingdom."

Outlook for New Crop      While there have been no official forecasts of the size of this year's Australian wheat crop, trade sources place it between 135 and 140 million bushels. A crop of this size would be well below those of 1951 and 1950 when production was estimated at 161.4 million and 184.2 million bushels, respectively. Among the factors reported to have contributed to the anticipated decrease in production this year have been a pronounced change from wheat to barley growing, drought in Western Australia and South Australia, and floods in New South Wales and Queensland.



CALENDAR OF WHEAT EVENTS, SEPTEMBER, 1952

- 5 - Based on conditions at September 1, the average yield of wheat in England and Wales was estimated at 40.5 bushels per acre, the same as in 1951.
- 8 - The Bureau of the Census reported that total commercial production of wheat flour in the United States in 1951 amounted to 229.3 million sacks, 2 per cent above the 1950 output of 224.9 million sacks. Wheat grindings amounted to 535.2 million bushels, compared with 523.4 million bushels the previous year.
- 9 - Wheat flour production during July in the United States was estimated by the Bureau of the Census at 19,099,000 sacks, an average of 868,000 sacks per working day, compared with working-day averages of 862,000 sacks in June, and 858,000 sacks in July, 1951.
- 10 - Based on conditions at September 1, this year's production of all wheat in the United States was estimated at 1,298.3 million bushels. Winter wheat production was placed at 1,062.6 million bushels while the outturn of durum and other spring wheat was estimated at 21.6 million and 214.1 million bushels, respectively.
- 16 - On the basis of conditions at August 31, a record Canadian wheat crop of 675.1 million bushels was estimated by the Dominion Bureau of Statistics. Production in the Prairie Provinces, in millions of bushels, was estimated as follows: Manitoba, 58; Saskatchewan, 417; and Alberta, 176.
  - In view of the congestion at Lakehead terminals and the possibility of a strike of grain handlers, an embargo was placed on the loading of prairie grain intended for shipment to the Lakehead.
- 18 - The threatened strike of Lakehead grain handlers was averted with the settlement of a wage dispute with 15 elevator companies. Under the agreement, which will remain in effect until December 31, 1953, the basic wage rate was increased to \$1.35 per hour and the work-week was reduced from 48 to 40 hours. Negotiations on other points under dispute are to be continued at a later date.
  - Following settlement of the threatened strike of Lakehead grain handlers, the embargo placed on grain shipments to the Lakehead was removed on order of the Transport Controller.
- 22 - According to Broomhall, the Argentine Minister of Agriculture has revised the estimate of the area seeded to this year's wheat crop to 15,496,000 acres.
- 25 - The Right Hon. C. D. Howe, Minister of Trade and Commerce, announced that the United Kingdom will purchase 115 million bushels of wheat or wheat in the form of flour from Canada under terms of the International Wheat Agreement for registration in 1952-53.







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