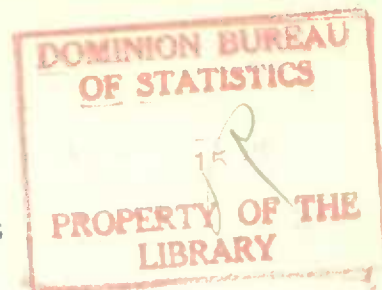


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THE WHEAT REVIEW



OCTOBER, 1952

DOMINION BUREAU OF STATISTICS
Department of Trade and Commerce

THE
WHEAT REVIEW

OCTOBER, 1952

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WORLD WHEAT SITUATION

Current Supplies Latest available estimates indicate that supplies of wheat remaining on or about October 1, 1952, in the four major exporting countries for export and carryover at the end of their respective crop years amounted to 1,485.0 million bushels, almost 26 per cent greater than the 1,179.4 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, 788.6 (592.3); Canada, 666.6 (525.6); Australia, 29.8 (34.5); and Argentina, 0.0 (27.0). Estimates for both years include on-farm stocks as well as those in commercial positions.

World Wheat Trade in 1951-52 May Have Set a Record The Food and Agriculture Organization of the United Nations, in its annual review of the state of food and agriculture, reported that world shipments of wheat in the crop year ending June 30, 1952 were maintained at a very high level. Preliminary estimates indicate that total exports of wheat and wheat flour in terms of wheat may have exceeded one billion bushels for the first time in history. The previous record, set in 1948-49, was approximately 991 million bushels.

Near-record exports by the United States and Canada, at approximately 470 million and 340 million bushels, respectively, more than offset sharp drops in shipments from Argentina and Australia, the other two traditionally large wheat exporters. The two North American countries together supplied about 80 per cent of the 1951-52 wheat exports as compared with about 65 per cent in the two preceding years.

Preliminary Estimate of 1951-52 Exports of Wheat and Wheat Flour, with Comparisons, July-June Periods

Exporter	1934-35— 1938-39 Average	1948-49	1949-50	1950-51	1951-52 (estimated)
- million bushels -					
Argentina	121.3	61.0	88.9	104.0	30.1
Australia	104.4	121.3	112.8	128.2	97.0
Canada	172.7	225.2	232.2	224.9	339.9
United States ^{1/}	66.1	507.1	317.8	376.6	470.0
Totals, 4 countries	464.4	914.6	751.8	833.7	937.0
Other countries	185.2	76.8	87.8	100.3	73.5
Totals, world	649.6	991.3	839.6	934.0	1,010.5

^{1/} Includes estimates of shipments to U.S. territories and possessions as well as exports of flour milled from wheat not wholly U.S. wheat.

The Outlook for 1952-53 With harvesting of the wheat crop now completed in the Northern Hemisphere, earlier indications of above-average outturns in practically all regions appear to have been fully realized. The combined crop in the two major exporting countries, the United States and Canada, have been estimated at a record level of almost two billion bushels. The near-record harvest reported for Western Europe, a traditionally deficit area, will probably reduce that region's import requirements unless sizable additions are made to reserve stocks. Although a record outturn is also reported for Asia, substantial imports of wheat will again be needed for India where there are shortages of both wheat and rice.

Harvesting has not yet commenced in the Southern Hemisphere but a fairly substantial net increase over last year's outturns is expected despite a smaller Australian crop. Trade estimates of the Australian wheat crop, seeded on a reduced acreage, range as high as 150 million bushels compared with 161 million harvested in 1951. As a result of sharply increased acreage and favourable growing conditions, the outlook for the Argentine wheat crop remained very favourable through October, with trade sources estimating the crop at a possible 250 million bushels, more than three times the abnormally low crop of 1951. Over the week-end of November 2, however, cold weather moved in all over the Argentine grain zone. Serious frost damage, varying with the stage of development of the crop, has been reported in some areas of the southern zone but the full extent of the damage will not be known for some time.

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

Importing Countries	Guaranteed Quantities 1/	S o u r c e				Total Purchases	Remainder 4/
		Canada 2/	Australia 3/	France 3/	U.S.A. 2/		
- thousand bushels -							
Austria	11,023	-	-	-	1,190	1,190	9,833
Belgium	20,209	8,931	-	-	534	9,465	10,744
Bolivia 5/	2,756	2,299	-	-	321	2,620	-
Brazil	13,228	2,483	-	-	2,444	4,927	8,301
Ceylon	6,614	-	4,641	-	498	5,139	1,475
Costa Rica	1,213	221	-	-	252	473	740
Cuba	7,422	442	-	-	1,134	1,576	5,846
Denmark	1,617	765	-	-	533	1,298	319
Dominican Republic ..	876	185	-	-	162	347	529
Ecuador	1,286	589	-	-	491	1,080	206
Egypt 5/	14,697	6,602	-	-	7,361	13,963	-
El Salvador	404	52	-	-	104	156	248
Germany	66,139	4,986	299	-	25,393	30,678	35,461
Greece	15,726	-	-	-	2,939	2,939	12,787
Guatemala	919	179	-	-	264	443	476
Haiti	1,029	51	-	-	167	218	811
Honduras Republic ...	367	54	-	-	154	208	159
Iceland	404	18	-	-	64	82	322
India	55,116	11,200	1,867	-	1,740	14,807	40,309
Indonesia	3,674	46	1,785	-	551	2,382	1,292
Ireland	10,104	5,600	1,859	-	-	7,459	2,645
Israel	5,879	2,093	-	-	1,049	3,142	2,737
Italy	40,418	11,023	299	-	2,403	13,725	26,693
Japan	18,372	3,674	1,157	-	3,228	8,059	10,313
Lebanon	2,388	373	-	-	937	1,310	1,078
Liberia	37	19	-	-	2	21	16
Mexico	12,860	-	-	-	4,468	4,468	8,392
Netherlands	24,802	7,925	727	-	8,433	17,085	7,717
New Zealand	4,593	-	4,326	-	-	4,326	267
Nicaragua	331	110	-	-	129	239	92
Norway	7,716	1,867	168	-	2,173	4,208	3,508
Panama 5/	625	487	-	-	107	594	-
Peru	5,512	2,229	-	-	2,080	4,309	1,203
Philippines	7,202	1,633	-	-	1,429	3,062	4,140
Portugal	5,626	672	10	-	1,587	2,269	3,357
Saudi Arabia 6/	1,837	-	-	-	282	282	1,555
Spain	4,373	-	-	-	1,505	1,505	2,868
Sweden	2,756	-	299	-	1,699	1,998	758
Switzerland	6,430	3,674	-	-	1,761	5,435	995
Union of South Africa	11,023	5,600	-	-	2,053	7,653	3,370
United Kingdom	177,068	28,918	16,358	-	5,480	50,756	126,312
Venezuela	6,246	1,376	-	-	685	2,061	4,185
Totals	580,917	116,376	33,795	-	87,786	237,957	
Guaranteed Quantities (Exporting Countries)		235,000	88,700	4,089	253,128	580,917	
Balance		118,624	54,905	4,089	165,342	342,960	

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

2/ Canadian sales through October 21st, 1952.

3/ Sales recorded by International Wheat Council through October 17th, 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.

6/ Sales may not be made until further advised.

CANADIAN SITUATION

Supply Position Canadian wheat supplies for the 1952-53 crop year remain unchanged at an estimated 888.1 million bushels, consisting of carryover stocks of 213.0 million and the new crop estimated, on the basis of conditions at August 31, at a record 675.1 million bushels. Any change in the next estimate of this year's crop, scheduled for release on November 14, will, of course, be reflected in the 1952-53 statistical supply position.

Harvesting of wheat in the Prairie Provinces was virtually completed by mid-October under generally favourable conditions. As a result, Canada is assured of a wheat crop of record proportions and of much higher quality than in the preceding two years. In 1950 a large proportion of the Western Canadian crop was damaged by frost and in 1951 one of the worst harvesting seasons on record produced an unprecedented quantity of out-of-condition grain. This year, however, indications are that about 65 per cent of the Western wheat crop will grade No. 1 or No. 2 Northern, with a further 20 per cent grading No. 3 or No. 4 Northern.

Canadian Wheat Supplies

Item	1952-53 <u>1/</u>	1951-52 <u>2/</u>
	- million bushels -	
Carryover in North America at July 31	213.0	189.2
New crop	675.1	552.7
Imports of wheat, August	<u>3/</u>	<u>3/</u>
Total estimated supplies	888.1	741.9
Less estimated domestic requirements for crop year.....	<u>160.0</u>	<u>172.3</u>
Available for export and carryover	728.1	569.6
Deduct:		
Overseas clearances of wheat as grain,		
August—September	47.3	33.6
Exports of Canadian wheat to U.S.,		
August—September	<u>5.9</u>	<u>4.6</u>
Total exports of wheat	53.2	38.3
Exports of wheat flour in terms of wheat,		
August—September	<u>8.3</u>	<u>5.7 <u>4/</u></u>
Total exports of wheat and wheat flour	61.5	44.0
Balance on October 1 for export and carryover	666.6	525.6

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

Exports of wheat as grain during September 1952 amounted to 24.5 million bushels, 4.1 million less than in August. This year's September wheat exports, however, were well above those for the same month in 1951 and 1950 when the totals were 19.1 million and 14.1 million bushels, respectively. The equivalent of an additional 5.0 million bushels of wheat was exported in the form of wheat flour during September 1952 as against 3.2 million in September 1951 and 2.3 million in

September 1950. Total exports of wheat and wheat flour in terms of wheat during the month were 29.5 million bushels.

This year's August-September exports of wheat as grain, at 53.2 million bushels, represent an increase of about 39 per cent over the 38.3 million bushels exported during the first two months of 1951-52. Some 10.8 million bushels, representing about 20 per cent of this year's August-September exports, went to the United Kingdom. Other major markets for Canadian wheat for the period under review, with quantities in millions of bushels, were as follows: Germany, 9.8; the United States, 5.9 (of which 1.3 million was for milling in bond); Belgium, 5.4; Yugoslavia, 3.3; India, 2.8; the Netherlands, 2.1; and Italy, 2.0. Preliminary data indicate that exports of wheat flour in terms of wheat for the first two months of 1952-53 totalled 8.3 million bushels as against 5.7 million for the comparable period last year.

The balance remaining on October 1, 1952 for export and carryover was estimated at 666.6 million bushels compared with 525.6 million a year ago.

Modifications in
Delivery Quotas

In order to ensure full utilization of country elevator storage space, the Canadian Wheat Board recently issued instructions to the trade in respect of requests for adjustment of local quotas and the necessity of declaring alternative delivery points. In the former instruction, issued on October 21, the Board stated that it "... is keeping in touch with the local position at all delivery points throughout the West, and is continually adjusting local delivery quotas to available space. However, with the railways moving about 15 million bushels of grain per week out of country elevators and some producers not delivering grain to the extent of established quotas, it may happen that local delivery quotas are temporarily inadequate.

In order to assist in maximum use of country storage facilities, the Board will give careful consideration to adjustment in local delivery quotas where such an adjustment is requested by all elevator agents at the delivery point. In making their recommendations to the Board, elevator agents should do so in a letter signed by all elevator agents at the delivery point concerned. ..."

In the instructions to the trade concerning alternative delivery points, issued on October 25, the Board stated, in part, that "At certain delivery points where additional space beyond reasonable local requirements in relation to the overall position for the season becomes available, either through acquisition of offsite storage, construction of new facilities, excessive car supply, or other reasons, it may be necessary to declare such points as alternative delivery points. This would only be done after the quota at the point, in the opinion of the Board, has reached a level to warrant such action and after taking all circumstances into consideration.

When any such point has been declared by the Board as an alternate delivery point, any producer may deliver wheat up to the quota in effect at that point and without the necessity of obtaining an authorized change in the delivery point designated in his permit book; provided, however, that no producer shall deliver at any point an amount of wheat, which, when added to all previous deliveries of wheat applicable to his 1952-53 quota, wherever made, shall be in excess of the amount permitted under the authorized quota at the point at which delivery is contemplated.

Under the above policy, the only grain that can be delivered to an alternate delivery point by a producer who is not registered there, is Wheat. ..."

Milling and Baking
Quality of 1952
Wheat Crop

The following press release, issued by the Grain Research Laboratory of the Board of Grain Commissioners for Canada on October 17, summarizes the results of milling and baking qualities of the 1952 Western Canadian spring wheat crop as reported in the Laboratory's bulletin "Canadian Wheat, 1952".

"Satisfactory milling and baking qualities for new-crop wheat are reported in a bulletin just issued by the Board of Grain Commissioners' Laboratory. The study was based on average samples of each grade made from a collection of 4,600 individual samples covering the crop-growing area of Western Canada.

Average bushel weights for grades 1, 2, and 3 Northern are 65.2, 64.5, and 64.0 lb., levels that are more than 1/2 lb. higher for 1 Northern, 1 1/2 lb. higher for 2 Northern, and 2 1/2 lb. higher for 3 Northern than in 1951. Protein contents for these grades are 13.2 per cent for 1 Northern, 12.7 per cent for 2 Northern, and 12.5 per cent for 3 Northern.

There are only small differences in the baking strength and supporting value of new-crop 1, 2, and 3 Northern. Doughs are quite satisfactory to handle and absorption goes up fairly regularly as grade goes down. Crumb texture and colour are the same for 1 and 2 Northern and a little poorer for 3 Northern. Flour ash goes up as grade goes down and flour colour is very good for all three grades. Gassing power goes up slightly and quite regularly as grade goes down, and levels are much lower than for last year's crop.

No. 4 Northern will be a comparatively small grade this year and much of it will be old crop. Because of its higher protein content, old-crop 4 Northern is higher in baking strength than current 3 Northern, but crumb texture is more open and crumb colour much darker. As in other years, 4 Northern is a useful grade for inclusion in the mill mixture. Large quantities of 5 and 6 wheat carried over from last year will be available.

There will be about 10 million bushels of durum wheat this year and most of it is expected to grade 2 and 3 C.W. Bushel weight is about the same as in 1951. Though protein content is lower this year it is adequate for good macaroni processing. Semolina pigment is considerably higher this year than for the past several years and macaroni colour for both grades is very good. The durum crop is slow in moving, but if the wheat maintains the high quality shown by early average samples this year will yield one of the best durum crops on record from the standpoint of macaroni-making quality.

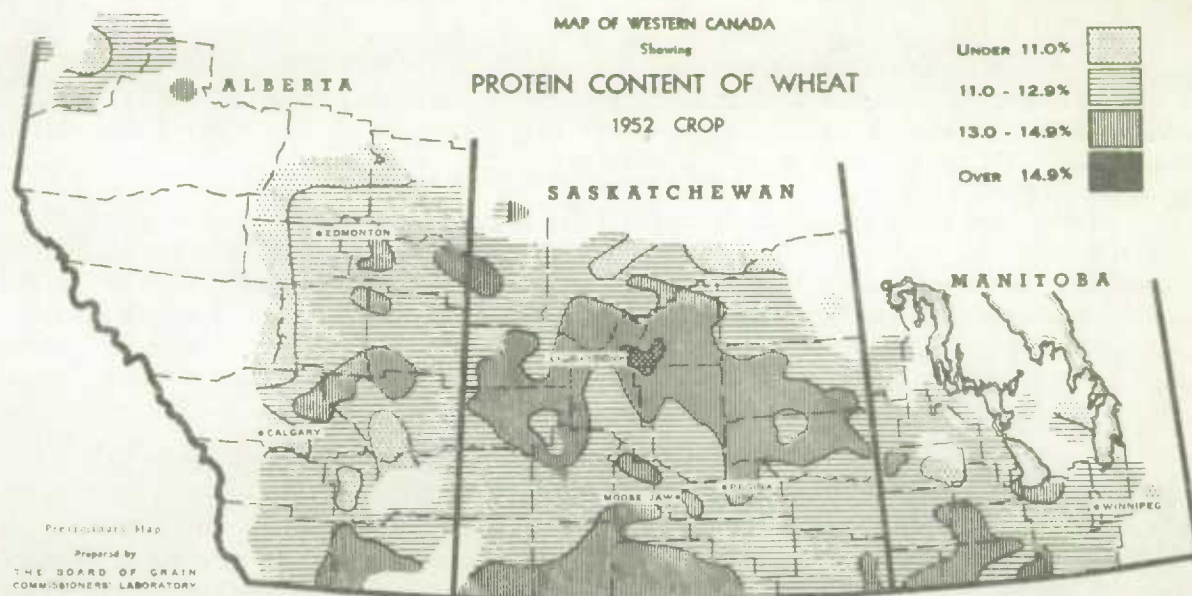
Some of the more important data for average samples of the first three Northern grades of the new crop are given below. Crop bulletin No. 45 entitled "Canadian Wheat 1952" will be available for distribution by the Board of Grain Commissioners' Laboratory shortly. It discusses the qualities of different grades of spring and durum wheat and contains data for various sets of samples.

	<u>No. 1 Northern</u>	<u>No. 2 Northern</u>	<u>No. 3 Northern</u>
Bushel Weight, lb.	65.2	64.5	64.0
Wheat Protein, %	13.2	12.7	12.5
Flour Ash, %	0.47	0.50	0.51
Flour Colour	7.8	8.0	7.6
Gassing Power, mm.	440	460	480
Absorption, %	60.2	60.8	61.5
Loaf Volume, cc.	690	675	670

Protein Content of
Western Canadian
1952 Spring Wheat

The interim protein map published by the Board of Grain Commissioners' Laboratory on October 8, 1952 indicated an average of 12.7 per cent for the 1952 wheat crop. This level is 0.9 per cent lower than the final figure of 13.6 per cent for the 1951-52 crop year. The long-time average is also 13.6 per cent. The final map, to be published in November, is expected to show a slight drop in average protein content.

Protein data given at this time are based on analyses of about 4,600 samples obtained from 1,400 individual stations in the Prairie Provinces. Provincial average protein levels are: Manitoba, 12.3 per cent; Saskatchewan, 12.9 per cent; and Alberta, 12.3 per cent. Grade levels for Western Canada are: 1 Northern, 12.9 per cent; 2 Northern, 12.6 per cent; and 3 Northern, 12.6 per cent. Data for crop districts are given in the accompanying table.



The above map shows only one small area in Saskatchewan with average protein over 14.9 per cent. Considerable areas of medium protein level (13.0-14.9 per cent) occur in all three provinces. But average protein is under 13.0 per cent throughout more than half of the crop-growing area.

Protein Content of 1952 Wheat Crop in the Prairie Provinces, by Crop Districts

Manitoba			Saskatchewan			Alberta		
C.D.	Mean	Range	C.D.	Mean	Range	C.D.	Mean	Range
- per cent -			- per cent -			- per cent -		
1	12.9	10.6-15.1	1A	12.1	10.3-15.2	1	12.9	10.1-15.9
2	13.0	10.7-15.4	1B	12.0	10.2-14.4	2	12.4	10.4-15.0
3	12.2	9.7-15.4	2A	12.1	10.3-14.8	3	11.7	9.1-14.1
4	12.9	11.8-13.7	2B	12.4	9.6-15.2	4	12.0	9.8-14.5
5	12.1	10.2-13.9	3AN	12.7	9.7-15.4	5	12.3	9.7-15.7
6	11.4	9.9-14.1	3AS	13.3	10.0-16.5	6	12.7	9.5-15.6
7	12.1	9.5-14.7	3BN	12.6	10.0-16.4	7	12.5	9.6-15.1
8	13.0	11.0-14.9	3BS	13.0	10.0-16.4	8	12.2	9.2-14.8
9	11.9	9.4-13.7	4A	12.9	9.7-16.1	9	-	-
10	11.9	9.8-14.0	4B	12.3	9.5-15.7	10	12.5	9.4-14.1
11	12.1	10.1-13.9	5A	13.1	10.0-15.5	11	11.9	10.3-14.6
12	12.0	9.4-14.4	5B	13.0	9.6-15.8	12	10.0	-
13	11.3	9.8-13.2	6A	13.4	10.3-16.9	13	11.5	9.9-13.5
14	12.4	10.1-13.9	6B	13.0	9.7-17.8	14	10.8	8.6-13.3
			7A	13.4	9.9-16.7	15	12.4	10.5-15.2
			7B	13.2	9.2-15.8	16	11.5	9.2-14.2
			8A	12.0	9.4-15.6			
			8B	14.3	10.6-16.5			
			9A	12.9	9.7-17.7			
			9B	12.5	9.9-15.1			

Farmers' Marketings Deliveries of wheat (both old and new-crop) by farmers in Western Canada from August 1 to October 16 of the current crop year amounted to 135.4 million bushels, compared with 111.8 million for the corresponding period last year. With the exception of the weeks ending October 2 and October 9, when marketings reached 25.0 million and 19.7 million bushels, respectively, weekly deliveries for the last eight weeks of the period under review have been maintained at a fairly uniform level, ranging between 14.9 million and 12.5 million bushels. Saskatchewan farmers marketed 81.7 million bushels or 60 per cent of the total for the period under review while farmers in Alberta and Manitoba marketed 37.0 million and 16.7 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
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	7,532,902
9 ...	1,125,450	11,640,224	6,890,852	19,656,526	16,554,874
16 ...	882,818	7,868,908	4,578,098	13,329,824	43,684,161
Totals	16,722,068	81,657,263	37,004,027	135,383,358	111,782,010

Delivery Quota Position The Canadian Wheat Board's summary of the number of Western Division country shipping points in each quota group for wheat as of October 28 indicated that the number of points still on the initial delivery quota of 5 bushels per seeded acre has been reduced to 884 or 42 per cent of the total as against 74 per cent on September 23. Details of recent announcements regarding wheat delivery quotas may be found on page 4 of this issue.

Summary of Elevator Shipping Points in Each Quota Group for Wheat in the Western Division as at October 28, 1952

Province	Quota in Bushels Per Seeded Acre					Open	Total
	5	8	10	12	15		
Ontario	-	-	-	-	-	2	2
Manitoba	34	223	45	46	28	-	376
Saskatchewan	648	424	32	13	-	-	1,117
Alberta	201	291	46	29	18	-	585
British Columbia	1	1	-	-	-	2	4
Totals	884	939	123	88	46	4	2,084

Visible Supply of Canadian Wheat, October 16, 1952, Compared with
Approximately the Same Date, 1951 and 1950

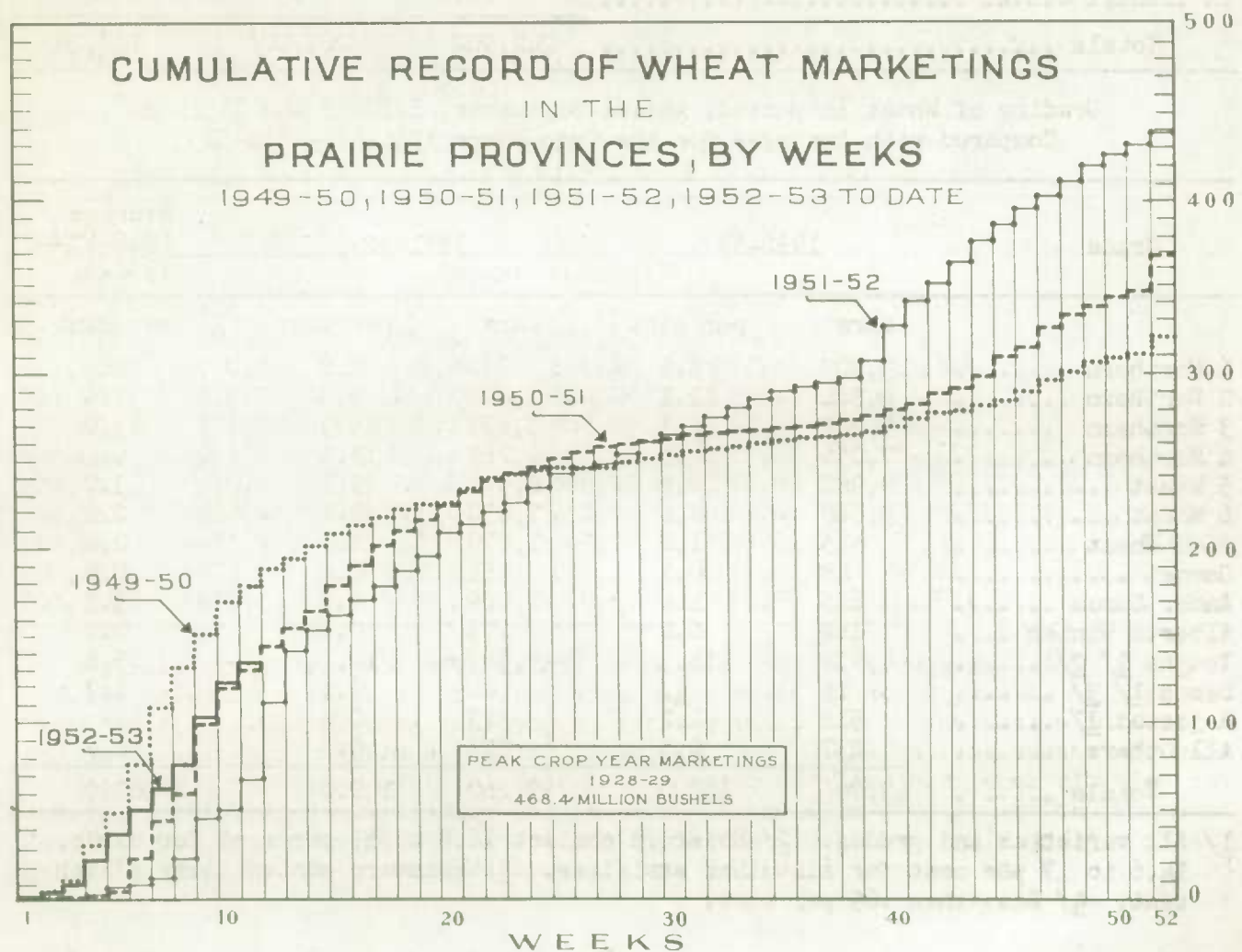
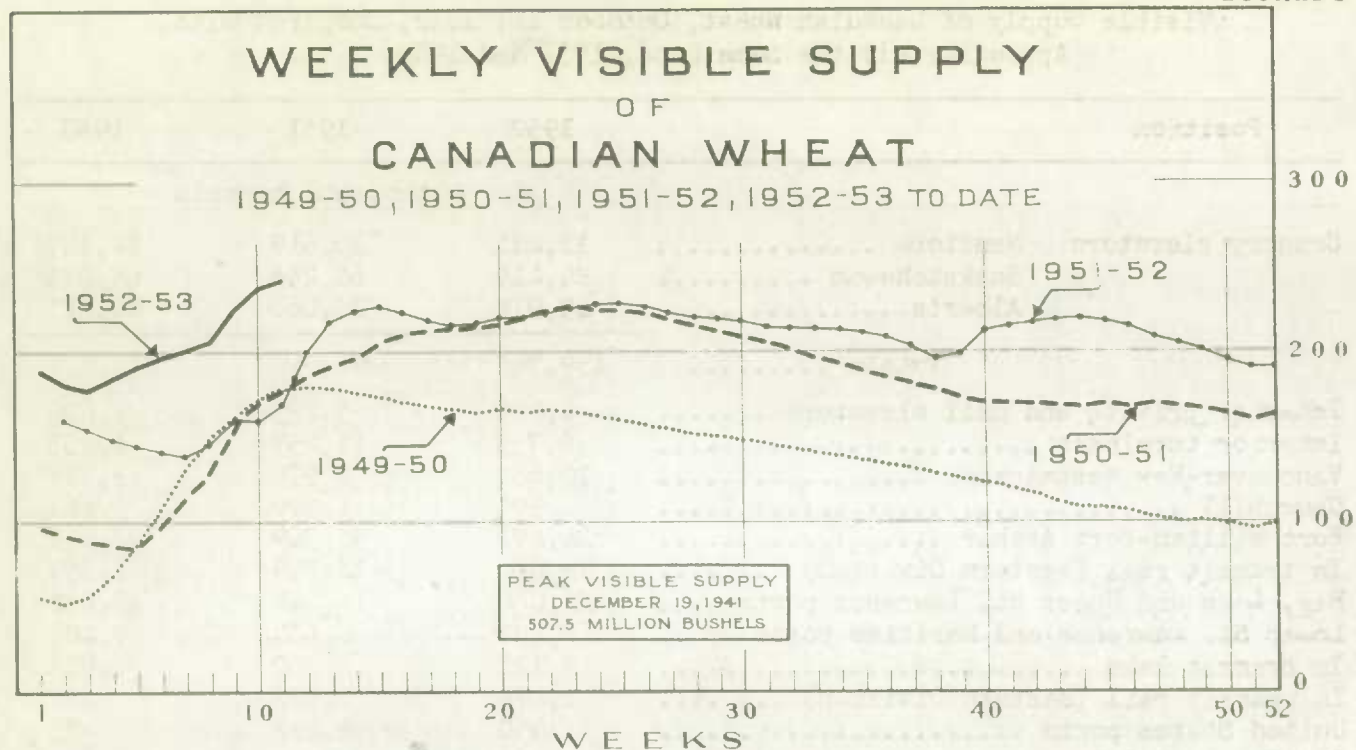
Position	1952	1951	1950
- thousand bushels -			
Country elevators - Manitoba	11,411	10,619	10,147
Saskatchewan	84,419	60,255	65,075
Alberta	43,918	26,066	40,215
Totals	139,748	96,940	115,437
Interior private and mill elevators	6,026	5,287	4,430
Interior terminals	6,753	11,257	1,935
Vancouver-New Westminster	10,662	3,974	8,799
Churchill	995	1,599	461
Fort William-Port Arthur	24,492	35,349	23,498
In transit rail (Western Division)	14,864	12,949	7,859
Bay, Lake and Upper St. Lawrence ports	23,060	16,246	13,036
Lower St. Lawrence and Maritime ports	8,492	8,684	9,489
In transit lake	5,121	4,250	2,802
In transit rail (Eastern Division)	1,474	2,977	464
United States ports	950	1,492	73
In transit U.S.A.	265	-	-
Totals	242,902	201,006	183,282

Grading of Wheat Inspected, August-September, 1952-53 and 1951-52
Compared with Averages for the Crop Years 1946-47-1950-51

Grade	1952-53		1951-52		Average 1946-47- 1950-51
	cars	per cent	cars	per cent	per cent.
1 Northern	3,902	8.9	752	2.0	14.8
2 Northern	4,844	11.1	3,690	9.9	37.6
3 Northern	7,202	16.5	5,697	15.3	13.0
4 Northern	7,056	16.1	4,269	11.5	4.4
5 Wheat	9,982	22.8	8,590	23.1	3.7
6 Wheat	3,668	8.4	7,430	19.9	2.2
Feed Wheat	515	1.2	1,070	2.9	0.4
Garnet	48	0.1	155	0.4	0.9
Amber Durum	625	1.4	1,069	2.9	3.5
Alberta Winter	162	0.4	175	0.5	0.7
Toughs 1/ 2/	4,932	11.3	3,767	10.1	15.6
Damps 1/ 3/	15	4/	40	0.1	1.3
Rejected 1/	518	1.2	313	0.8	-
All Others	237	0.5	243	0.7	1.9
Totals	43,706	100.0	37,260	100.0	100.0

1/ All varieties and grades. 2/ Moisture content 14.9 to 17 per cent for durum, 14.6 to 17 per cent for all other varieties. 3/ Moisture content over 17 per cent. 4/ Less than .05 per cent.

MILLION
BUSHELS



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

Ocean Shipments of Wheat from Churchill,
Season of Navigation, 1931—1952

Year	Shipments <u>1/</u> bushels	Year	Shipments <u>1/</u> bushels
1931	545,000	1942	-
1932	2,736,000	1943	740,000
1933	2,708,000	1944	-
1934	4,050,000	1945	-
1935	2,407,000	1946	2,929,000
1936	4,294,000	1947	4,976,000
1937	604,000	1948	5,314,000
1938	917,000	1949	5,528,000
1939	1,772,000	1950	6,768,000
1940	-	1951	7,278,000
1941	-	1952	8,581,000

1/ To nearest thousand bushels.

Ocean shipments from Churchill during the 1952 navigation season totalled 8.6 million bushels, setting a record for the sixth consecutive year and exceeding the previous high level established in 1951 by 1.3 million bushels. During the current season a total of 26 vessels loaded wheat at Churchill, with the first one loaded on August 2 and the last on October 8.

Lake Shipments of Canadian Grain from the Opening of Navigation to
October 16, 1952 and to Approximately the Same Date, 1942—1951

Year	Wheat	Oats	Barley	Rye	Flaxseed	Total
- thousand bushels -						
1942	133,177	2,554	4,024	905	521	141,180
1943	148,925	32,931	35,568	1,286	3,406	222,116
1944	226,838	58,168	36,323	6,140	5,049	332,518
1945	259,154	66,853	30,426	3,411	2,824	362,668
1946	84,476	43,437	20,369	1,048	1,175	150,504
1947	111,210	30,759	16,890	4,895	152	163,906
1948	77,032	18,777	18,986	2,742	5,071	122,608
1949	123,396	24,064	23,234	6,387	4,904	181,985
1950	96,910	15,853	17,291	3,717	2,816	136,586
1951	129,787	45,511	34,260	5,813	1,178	216,549
1952	169,411	69,432	73,810	5,996	3,958	322,607

Total shipments of the five major grains from Lakehead terminals from the opening of navigation to October 16 amounted to 322.6 million bushels, 106.1 million more than during the corresponding period last year but 40.1 million less than the record set in 1945. Wheat shipments, at 169.4 million bushels, accounted for slightly more than half the current crop-year total to date. Shipments of oats and barley, at 69.4 million and 73.8 million bushels, respectively, maintained the record-breaking levels set earlier in the year. Rye shipments, at 6.0 million bushels, were the largest since 1944 and flaxseed shipments, at 4.0 million bushels, were the largest since 1949.

Wheat Shipments* to the United States by Destination

August 1 to October 16, 1952

Compared with Approximately the Same Period, 1951 and 1950

Destination	1952	1951	1950
By Vessel		- bushels -	
Duluth-Superior	1,145,234	1,581,629	62,138
Milwaukee	-	120,426	-
Chicago	244,968	332,807	-
Huron	153,315	-	-
Erie	276,567	-	-
Buffalo	4,204,273	4,274,132	1,968,666
Oswego	1,102,391	514,005	-
Totals, Vessel	7,126,748	6,822,999	2,030,804
By Rail			
U.S.A. Seaboard Ports	-	1,400	29,494
Other U.S.A. Points	1,539,622	904,051	41,030
Totals, Rail	1,539,622	905,451	70,524
Totals, Shipments	8,666,370	7,728,450	2,101,328

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

Freight Assistance Shipments Claims filed for payment up to September 30, 1952 represent shipments of 938,000 bushels of wheat and 21,358 tons of mill-feeds from the Prairie Provinces to Eastern Canada and British Columbia under the freight assistance plan during August 1952. However, on the basis of claims filed up to September 30 last year for August shipments, substantial upward revisions in the August 1952 totals may be expected as additional claims are filed.

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

Month	Nfld.	P.E.I.	N.S.	N.B.	Que.	Ont.	B.C.	Total
					- thousand bushels -			
August, 1952 1/	8	26	48	41	413	352	50	938
August, 1951								
Preliminary 2/	1	24	33	34	371	290	3	754
Revised 1/	3	29	66	59	516	421	237	1,331

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

Province	August, 1952	August, 1951	
	Preliminary 1/	Preliminary 2/	Revised 1/
		- tons -	
Newfoundland	129	28	227
Prince Edward Island	382	268	607
Nova Scotia	1,551	1,271	3,177
New Brunswick	2,103	1,110	2,675
Quebec	10,769	8,547	21,897
Ontario	6,151	3,195	11,602
British Columbia	273	45	4,775
Totals	21,358	14,464	44,960

1/ Based on claims filed up to September 30, 1952.

2/ Based on claims filed up to September 30, 1951.

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	1,181,046	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 during September amounted to 1.2 million bushels, considerably higher than the usual September movement. Monthly rail shipments in excess of one million bushels from the Lakehead are normally confined to the season when lake navigation is closed but during September this year substantial quantities were shipped directly to Halifax and West Saint John for export.

Distribution of the September 1952 shipments by grade and destination is shown in the table below. The bulk of the month's shipments, almost 940,000 bushels, consisted of No. 2 Northern wheat, with all except 9,500 bushels going to seaboard positions for export.

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

Grade	P.E.I.	N.S.	N.B.	Que.	Ont.
- bushels -					
1 Northern	-	-	-	-	6,000
2 Northern	-	469,500	460,500	-	9,500
4 Northern	-	-	-	-	4,477
No. 5	1,500	1,633	-	19,233	10,167
No. 6	-	-	-	100	1,500
Feed	-	-	-	4,583	-
Amber Durum	-	1,458	5,809	17,228	43,181
Toughs	500	-	-	11,508	4,000
All Others	1,500	3,000	7,917	24,539	71,713
Totals	3,500	475,591	474,226	77,191	150,538

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

Year and Month	Overseas Clearances of Canadian Wheat 1/	Exports of Canadian Wheat to U.S.A. for Domestic Use and Grinding in Bond 2/	Customs Exports of Canadian Wheat Flour 3/	Total	Customs 4/ Exports of Wheat and Wheat Flour
- thousand bushels -					
<u>1950-51</u>					
August	11,957	459	3,060	15,475	15,247
September	13,172	904	2,273	16,349	15,257
October	12,950	900	3,652	17,502	19,715
November	15,801	2,007	5,669	23,477	20,140
December	8,030	2,149	4,157	14,335	20,424
January	9,891	1,935	5,700	17,526	16,315
February	9,259	929	4,727	14,915	14,180
March	9,969	1,097	5,221	16,287	17,663
April	9,604	3,105	5,809	18,518	16,870
May	15,140	2,558	6,677	24,375	21,748
June	23,302	2,198	4,813	30,313	25,968
July	25,662	2,062	4,163	31,888	33,097
Totals	164,736	20,303	55,921	240,961	236,624
<u>1951-52 5/</u>					
August	16,921	2,240	2,581	21,742	27,182
September	16,726	2,376	3,151	22,253	22,161
October	23,764	3,830	3,851	31,445	24,212
November	29,830	5,687	4,033	39,550	34,671
December	12,075	4,701	3,683	20,459	37,347
January	14,382	1,620	3,407	19,409	18,523
February	16,010	2,574	4,180	22,764	18,472
March	15,876	1,215	5,354	22,445	21,904
April	16,657	3,342	4,389	24,388	30,516
May	35,550	2,725	5,735	44,010	38,138
June	33,770	4,554	6,101	44,425	40,894
July	34,478	3,818	5,374	43,670	44,782
Totals	266,039	38,683	51,838	356,560	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
Totals	47,297	5,870	8,324	61,491	66,272

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 year 1950-51 and August, 1951 to June, 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	June	September		August-September*	
	Wheat Flour 1/2/	Wheat Flour 2/	Wheat 3/	Wheat Flour 2/	Wheat 3/
	- bushels -	- bushels -		- bushels -	
<u>COMMONWEALTH COUNTRIES</u>					
United Kingdom	2,012,022	1,317,254	2,341,485	2,853,149	10,804,751
<u>Africa</u>					
Gambia	-	-	-	549	-
Nigeria	17,204	18,734	-	34,097	-
Sierra Leone	1,377	3,559	-	7,024	-
<u>Asia</u>					
British Malaya	11,574	45,333	-	76,869	-
Ceylon	447,336	484,533	-	484,533	-
Hong Kong	42,575	253,350	750	302,004	2,417
India	-	90	-	90	2,782,090
<u>Europe</u>					
Gibraltar	517	10,926	-	26,302	-
<u>North America</u>					
Bahamas	15,709	18,288	-	45,742	-
Barbados	19,552	50,666	850	85,302	850
Bermuda	5,301	7,488	-	16,574	-
British Honduras	-	6,111	-	10,800	-
Jamaica	203,459	13,104	-	253,998	-
Leeward and Windward Islands	65,380	94,716	-	175,190	-
Trinidad and Tobago	96,534	245,317	-	340,524	-
<u>South America</u>					
British Guiana	121,842	100,710	-	205,492	-
Totals, Commonwealth Countries ...	3,060,382	2,670,179	2,343,085	4,918,239	13,590,108
<u>FOREIGN COUNTRIES</u>					
<u>Africa</u>					
Azores and Madeira	-	1,962	-	1,962	-
Belgian Congo	27,067	-	-	3,524	-
Canary Islands	450	-	-	-	-
Egypt	1,171,332	800,852	1,450,533	833,846	1,450,533
French Africa	-	4,500	-	7,943	-
Liberia	576	666	-	1,750	-
Morocco	46,931	99,684	-	119,916	-
Portuguese Africa	689	1,948	37,333	1,948	37,333
Tripoli	-	-	112,000	-	112,000
<u>Asia</u>					
Arabia	9,562	-	-	3,438	-
China	-	-	250	-	3,583
Indonesia	26,392	4,590	-	8,033	-
Israel	3,924	-	319,200	-	319,200
Japan	76,703	61,164	632,800	96,129	632,800
Lebanon	5,143	11,727	606,667	18,648	970,667
Philippine Islands	284,787	577,926	-	973,733	-
Portuguese Asia	1,147	10,120	-	10,120	-
Siam	6,656	52,780	-	62,253	-
Syria	-	-	-	49	-
<u>Europe</u>					
Belgium	-	-	2,830,960	-	5,386,403
France	-	-	948,178	-	1,287,165
Germany	-	-	3,967,134	-	9,809,268
Greece	-	-	-	-	698,163
Iceland	-	22,774	-	22,774	-
Ireland	-	-	618,767	-	1,040,388
Italy	713,434	9,581	168,448	13,005	1,961,315
Netherlands	-	-	1,174,437	-	2,119,375
Portugal	1,642	5,742	-	5,742	-
Sweden	-	-	734,084	-	734,084

Exports of Canadian Wheat and Wheat Flour, 1952-53

Destination	June	September		August-September*	
	Wheat Flour 1/2/ - bushels -	Wheat Flour 2/ - bushels -	Wheat 3/ - bushels -	Wheat Flour 2/ - bushels -	Wheat 3/ - bushels -
<u>FOREIGN COUNTRIES</u>					
<u>Europe</u>					
Switzerland	-	-	783,567	-	1,081,609
Yugoslavia	918	918	1,847,200	2,641	3,265,700
<u>North America</u>					
Alaska	112	-	-	9	-
Costa Rica	67,639	96,071	-	171,590	-
Cuba	88,425	3,213	-	9,990	1,000
Dominican Republic	20,641	2,295	-	29,030	-
El Salvador	1,031	32,049	-	59,805	-
French West Indies	851	684	-	1,966	-
Guatemala	11,241	46,134	-	59,265	-
Haiti	36,896	16,789	-	29,340	-
Honduras	689	-	-	-	-
Netherlands Antilles	13,842	16,691	-	27,842	-
Nicaragua	9,355	32,225	-	41,000	-
Panama	11,732	48,807	-	76,788	-
St. Pierre and Miquelon	171	1,606	-	3,262	-
United States					
Flour in terms of wheat	9,477	8,127	-	13,446	-
For grinding in bond 4/	-	-	482,284	-	1,286,798
For domestic use 4/	-	-	2,829,620	-	4,583,661
Virgin Islands	2,295	346	-	2,641	-
<u>Oceania</u>					
Hawaii	-	-	-	-117	-
<u>South America</u>					
Argentina	-	-	-	4	-
Bolivia	-	-	369,600	-	369,600
Brazil	-	-	463,351	-	463,351
Chile	-	-	1,239,867	-	1,402,867
Colombia	21,618	29,399	35,000	31,694	35,000
Ecuador	10,296	7,231	-	44,307	-
Peru	-	11,480	525,467	11,480	525,467
Surinam	6,854	21,861	-	22,126	-
Venezuela	350,447	247,892	-	582,449	-
Totals, Foreign Countries	3,041,015	2,289,834	22,176,747	3,405,605	39,577,330
Totals, Exported	6,101,397	4,960,013	24,519,832	8,323,844	53,167,438

1/ Exports for June, 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/ Compiled 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.

*Due to adjustments in data on destinations, the August wheat export figures as published in the September issue of The Wheat Review should read:

Hong Kong	1,667 bushels
China	3,333 "
Belgium	2,555,443 "
Germany	5,842,134 "
Switzerland	298,042 "

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

Class and Grade	Week ending			
	Sept. 27	Oct. 4	Oct. 11	Oct. 18
- 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 1/</u>				
(International Wheat Agreement)				
1 Hard	172/6	172/7	173/6	173/7
1 Northern	172/6	172/7	173/6	173/7
2 Northern	170/6	170/7	171/6	171/7
3 Northern	168/6	168/7	169/6	169/7
4 Northern	162/6	162/7	163/6	163/7
5 Wheat	152/6	152/7	153/5	153/7
6 Wheat	151/6	151/7	152/6	152/7
Feed Wheat	146/6	146/7	147/6	147/7
1 C.W. Garnet	170/6	170/7	171/6	171/7
2 C.W. Garnet	169/6	169/7	170/6	170/7
3 C.W. Garnet	166/6	166/7	167/6	167/7
1 Alberta Red Winter	172/6	172/7	173/6	173/7
2 Alberta Winter	170/6	170/7	171/6	171/7
3 Alberta Winter	168/6	168/7	169/6	169/7
1 C.W. Amber Durum	172/6	172/7	173/6	173/7
2 C.W. Amber Durum	170/6	170/7	171/6	171/7
3 C.W. Amber Durum	169/6	169/7	170/6	170/7
<u>Export - Class II</u>				
1 Hard	220/1	220/7	221	219/5
1 Northern	220/1	220/7	221	219/5
2 Northern	218/1	218/7	219	217/5
3 Northern	216/1	216/7	217	215/5
4 Northern	210/1	210/7	211	209/5
5 Wheat	158/6	158/7	159/5	159/7
6 Wheat	157/6	157/7	158/6	158/7
Feed Wheat	152/6	152/7	153/6	153/7
1 C.W. Amber Durum	230/1	230/7	231	229/5
2 C.W. Amber Durum	228/1	228/7	229	227/5
3 C.W. Amber Durum	227/1	227/7	228	226/5

1/ Plus 6 cents carrying charge.

CANADIAN FLOUR MILLING SITUATION

Production Wheat flour production reported by Canadian mills for September 1952 amounted to some 2,120,000 barrels, compared with 1,943,000 in the preceding month and 1,791,000 in September 1951. The ten-year (1942-1951) average production for September was 2,024,000 barrels. Mills reporting operations during September this year had a rated capacity of 96,560 barrels and, on the basis of a 25-day working period, 87.8 per cent of this rated capacity was effective.

Wheat milled for flour during September 1952 amounted to 9.6 million barrels as against 8.1 million for the same month last year. Approximately 8.7 million bushels of the wheat milled for flour during September this year was Western Canadian spring wheat (other than durum). Most of the balance consisted of Ontario winter wheat (528,400 bushels) and durum wheat (133,000 bushels).

Exports According to preliminary Customs returns, exports of Canadian wheat flour during September amounted to 1,102,225 barrels (4,960,000 bushels of wheat equivalent). Flour shipments during the month were reported to fifty countries and colonies, with the largest amount, some 1.3 million bushels of wheat equivalent, going to the United Kingdom. Other major shipments, in thousand bushels of wheat equivalent, went to Egypt (801), the Philippine Islands (578), Ceylon (485), Hong Kong (253), Venezuela (248), and Trinidad and Tobago (245).

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

Crop Year	Wheat Milled for Flour	Wheat Flour	
		Production	Exports <u>1/</u>
	- 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 <u>2/</u>	104,553,678	22,854,662	11,519,563
<u>1952-53 2/</u>			
August	8,809,102	1,943,274	747,518
September	9,557,709	2,120,469	1,102,225
Totals	18,366,811	4,063,743	1,849,743
Same period 1951-52 (Revised)	15,843,366	3,481,535	1,273,852

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

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

UNITED STATES SITUATION

Supply Position The latest official estimate of the 1952 United States wheat crop, based on conditions at October 1, placed it at 1,298.9 million bushels, virtually unchanged from the August and September estimates. Total domestic supplies are now estimated at 1,552.8 million bushels, the third largest in history and 169.1 million greater than in 1951-52. Despite the high level of current crop-year supplies, imports of Canadian wheat, most of which was of feeding quality, amounted to 7.9 million bushels in the July—September period as against 6.6 million during the first quarter of 1951-52.

United States Wheat Supplies

Item	1952-53 <u>1/</u>	1951-52
	- million bushels -	
Carryover at July 1	253.9	396.2
New crop	1,298.9 <u>2/</u>	987.5
Total estimated domestic supplies	1,552.8	1,383.7
Imports of wheat for domestic use, July—September	7.9	6.6
Total estimated supplies <u>3/</u>	1,560.7	1,390.3
Less estimated domestic requirements for crop year <u>4/</u> ..	700.0	686.7
Available for export and carryover	860.7	703.6
Deduct:		
Exports of wheat as grain, July—September	63.0	101.4
Exports of wheat flour and macaroni in terms of wheat, July—September	9.1	9.9
Total exports of wheat, wheat flour and macaroni ..	72.1	111.3
Balance on October 1 for export and carryover	788.6	592.3

1/ Preliminary. 2/ Official estimate as of October 1, 1952. 3/ Excluding imports for October—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.

Exports of wheat as grain during the July—September period of the current crop year amounted to 63.0 million bushels, down by slightly more than one-third from last year's total of 101.4 million bushels for the corresponding period. Exports of wheat flour and macaroni in terms of wheat, at 9.1 million bushels, were also down from last year's level of 9.9 million but the drop was not nearly as sharp as in exports of wheat as grain. Total exports of wheat, wheat flour and macaroni, at 72.1 million bushels, were approximately 35 per cent below the 111.3 million bushels exported during the first three months of 1951-52. The balance on October 1, 1952 remaining for export and carryover was estimated at 788.6 million

bushels as against 592.3 million at the same time last year.

Farm Wheat Stocks According to the October 10 report of the Crop Reporting Board,
Estimated at 507 Bureau of Agricultural Economics, stocks of wheat on United
Million Bushels States farms on October 1, 1952 amounted to 507 million bushels,
the largest since 1948. These stocks are, however, nearly
5 per cent below the 10-year average of 533 million bushels. The disappearance
from farms during July—September, of 856 million bushels, was the largest on record
for that period. This may be compared with 579 million bushels moved off of farms
in the same period of 1951 and the 10-year average of 645 million bushels.
October 1 stocks this year account for 39 per cent of the 1952 production, compared
with 48.7 per cent a year earlier and the 10-year average of 49.9 per cent.

More wheat was being held on farms October 1 than a year earlier in all
regions except the South Atlantic and far western States. Kansas, with a record
winter wheat crop, had 114 million bushels on farms or 23 per cent of the Nation's
total. North Dakota production of wheat was down this year and 79 million bushels
remained on farms on the first of the month, accounting for 16 per cent of the
total for all States, compared with 26 per cent held a year earlier when a large
spring wheat crop was harvested. Disappearance during the July—September period
was record high in the North Atlantic and North Central States and one of the
largest in each of the other regions.

Record Quantity The United States Department of Agriculture announced on
of Wheat under October 8 that farmers had put a record quantity of wheat under
Price Support price support for this time of year. As of September 15, 1952
more than 262 million bushels of 1952-crop wheat had been placed
under the price support programme. This year's total was more than double the
121 million bushels of 1951-crop wheat placed under price support through
September 30, 1951. The bulk of the current crop coming under the government
price support programme, some 221.1 million bushels, was stored in warehouses
under loan. Details of quantities of 1952-crop wheat in those States having at
least 5 million bushels under price support are given in the accompanying table.

1952-Crop United States Wheat Placed under Price Support Programme
through September 15, 1952

State	Loans - Stored		Purchase Agreements	Total Quantity under Support Programme
	Farm	Warehouse		
- thousand bushels -				
Colorado	3,283	11,606	345	15,235
Kansas	17,793	89,764	647	108,204
Montana	1,520	3,449	136	5,104
Nebraska	5,617	16,062	179	21,858
North Dakota	2,857	5,079	74	8,010
Ohio	659	5,408	24	6,091
Oklahoma	570	41,546	96	42,211
Texas	285	13,853	22	14,160
Washington	1,155	12,259	31	13,444
Other States	5,531	22,079	343	27,953
Totals	39,270	221,104	1,896	262,271

Stocks of Wheat
in all Positions
October 1, 1952

Stocks of 1,342 million bushels of United States wheat, second largest in history, were stored in all positions on October 1, 1952, according to a report released by the Bureau of Agricultural Economics on October 24, 1952. This total is only 2 per cent less than that of October 1, 1942, and nearly a fifth more than a year ago. It also exceeds 1952 production by 3 per cent, reflecting the large carryover of old wheat.

Off-farm stocks of 835 million bushels of wheat were the largest on record, despite relatively small holdings of only 4.3 million bushels owned and stored by the Commodity Credit Corporation in storages under CCC control. Commercial stocks of nearly 314 million bushels at terminals, as reported by the Production and Marketing Administration, are the largest ever reported for that position on October 1. For the positions covered by estimates of the Crop Reporting Board, stocks of over 149 million bushels at merchant mills are near-record and the 368 million bushels at interior mills, elevators and warehouses are largest in the 19-year series. Farm stocks of 507 million bushels are slightly below average for October 1. Disappearance from the domestic supply of 1,556 million bushels on July 1, 1952 (carryover of 257 plus new crop of 1,299 million bushels) is indicated at only 214 million bushels, smallest for the July-September quarter since 1941.

Stocks of Wheat, October 1, 1952, with Comparisons

Position	October 1, 1950	October 1, 1951	July 1, 1952	October 1, 1952
- thousand bushels -				
On farms <u>1/</u>	482,251	480,847	64,449	507,015
Terminals <u>2/</u>	260,104	238,443	93,924	313,561
Commodity Credit Corporation <u>3/</u> ...	4,734	3,790	1,144	4,321
Merchant mills <u>4/</u>	137,422	131,963	39,568	149,271
Int. mills, elev. and whses. <u>1/</u> <u>5/</u> .	320,831	273,021	57,879	367,764
Totals	1,205,342	1,128,064	256,964	1,341,932

1/ Estimates of the Crop Reporting Board.

2/ Commercial stocks reported by the Grain Branch, P.M.A., at 43 terminal markets.

3/ Owned by CCC and stored in bins or other storages owned or controlled by CCC; also CCC-owned in transit to ports and in Canadian elevators. Other CCC-owned grain is included in the estimates by positions.

4/ Mills reporting to the Bureau of the Census on millings and stocks of flour.

5/ All off-farm storages not otherwise designated for each grain.

Flour Production

The Bureau of the Census, Department of Commerce, in a press release dated October 13, estimated wheat flour production in August at 19,177 thousand sacks, an average of 913 thousand sacks per working day, compared with working day averages of 868 thousand sacks in July and 854 thousand sacks in August 1951. Total production of wheat flour in August was less than 1 per cent above production in July and about 2 per cent lower than production in August of last year. Wheat flour mills in August operated at 82.3 per cent of capacity compared with 78.2 per cent the previous month.

Wheat grindings in August were estimated at 44,698 thousand bushels compared with 44,530 thousand bushels in July. Wheat offal production was estimated at 386 thousand tons.

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	
September 25, 1952	238 1/2 - 243 3/4		September 25, 1952	239 - 240	
26	238 - 246 1/2		26	239 1/2 - 240 1/2	
29	237 3/4 - 250 3/4		29	238 3/4 - 239 3/4	
30	230 3/4 - 248 1/4		30	238 - 239	
October 1	237 1/4 - 238		1	238 5/8 - 239 5/8	
2	236 1/2 - 249 1/2		2	238 1/2 - 239 1/2	
3	237 1/4 - 247 1/2		3	238 5/8 - 239 5/8	
6	237 1/4 - 248 1/2		6	238 1/4 - 239 1/4	
7	237 - 239		7	237 5/8 - 238 5/8	
8	236 1/4 - 246		8	237 3/8 - 238 3/8	
9	235 1/4 - 247 3/4		9	237 1/8 - 238 1/8	
10	235 1/4 - 242 1/2		10	237 1/8 - 238 1/8	
13	Columbus Day		13	Columbus Day	
14	232 3/4 - 247 1/2		14	237 - 238	
15	234 1/2 - 244		15	236 1/8 - 237 1/8	
16	233 1/4 - 239 1/4		16	236 3/8 - 237 3/8	
17	237 3/4 - 242 1/2		17	239 1/8 - 240 1/8	
20	238 1/2 - 246 3/4		20	241 1/8	
21	239 3/4 - 247 1/4		21	241 7/8	
22	240 1/4 - 247 3/4		22	241	
23	240 - 251 3/4		23	241 5/8 - 242 5/8	
24	239 1/2 - 247 3/4		24	241 1/4 - 242 1/4	

Chicago Wheat Futures, High Points of Closing

Date	December	March	May	July
	- cents and eighths per bushel -			
September 25, 1952	234/2	240/2	242/5	238/6
26	234	240/1	242/4	239/3
29	233/2	239/4	242	239/7
30	233/3	239/4	242	239/5
October 1	234	240/1	242/4	239/5
2	233/6	239/7	242/3	239/6
3	234/6	240/6	243/1	241
6	234/4	240/5	243/1	241
7	233/4	239/7	242/5	240/6
8	232/7	239/1	241/7	239/6
9	233	239/1	241/6	239/5
10	233/6	239/6	242/5	240
13		Columbus Day		
14	233/2	239/4	242/3	239/6
15	232/6	239	241/7	239/2
16	233/4	239/7	242/6	240/3
17	236/2	242/6	245/5	244
20	237/2	243/5	246/4	245/1
21	238/1	244/4	247/5	246/3
22	236/5	242/7	246/1	245
23	237/1	243/2	246/4	245/5
24	237	243	246/2	244/5

ARGENTINE SITUATION

Supply Position Current crop-year wheat supplies in the Argentine are now placed at 101.6 million bushels, comprised of carryover stocks of 18.4 million, the 1951 crop of 75.3 million, and imports of 7.9 million. The slight increase over the level shown a month ago results from an indicated increase of 10 per cent in the original quantities of wheat to be imported under a barter arrangement in exchange for Argentine corn. Exports of wheat during the current crop year amounted to only 3.8 million bushels, all of which was shipped out during the first few months against old contracts, in sharp contrast to the 86.6 million bushels exported during the first ten months of 1950-51. As a result of the abnormally short supply situation, no wheat was available for export or carryover on October 1 this year as against the 27.0 million bushels available a year ago.

Argentine Wheat Supplies

Item	1951-52 <u>1/</u>	1950-51
	- million bushels -	
Carryover at beginning of crop year (December 1)	18.4	7.3
New crop	75.3	213.1
Total estimated domestic supplies	93.7	220.4
Imports of wheat for domestic use	7.9 <u>2/3/</u>	-
Total estimated supplies	101.6 <u>2/</u>	220.4
Less estimated domestic requirements for crop year	97.8	106.8
Available for export and carryover	3.8	113.6
Deduct:		
Exports of wheat as grain, December—September	3.8	85.9
Exports of wheat flour in terms of wheat, December—September	<u>4/</u>	0.7
Total exports of wheat and wheat flour	3.8	86.6
Balance on October 1 for export and carryover	-	27.0

1/ Preliminary. 2/ Revised. 3/ To be imported under barter arrangement in exchange for Argentine corn. 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 October 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 Weather conditions continue very favourable for Argentine grain crops so that an air of optimism is general throughout the country including official circles on harvest prospects. All major zones have sufficient moisture to finish the crop—in fact some areas have had almost too much rain. The weather for the past two weeks has been seasonably mild and spring-like. There is, of course, the danger of late frosts for another month and excess moisture in areas such as southern Santa Fé province could favour the spread of rust. Pastures continue to be generally good throughout so that a large portion of the coarse grains will be left for harvest.

Wheat - 1952-53 Crop The Ministry of Agriculture officially estimate the area sown to wheat at 6,270,000 hectares (15.5 million acres) 33 per cent above last year but slightly lower than the 6.5 million hectares (16.1 million acres) in 1950-51. The condition of the crop continues from good to excellent in virtually all zones.* With continued favourable weather and barring late frosts and rust infection, Argentina should have a crop in the vicinity of 6.5 million tons (238.8 million bushels). This will provide an export surplus of around 3 million tons (110.2 million bushels) depending on the amount that will be held for reserve and the continuance of the restrictions on the use of wheat for home consumption.

Wheat-for-Corn Barter Deal It is understood that the quantities of wheat and corn involved under the arrangement whereby Argentina is presently importing wheat from the United States in a barter deal with grain exporters in exchange for corn have been increased by 10 per cent. Thus imports of wheat will total 215,700 tons (7,926,000 bushels), and corn to be exported from Argentina 279,400 tons (10,999,000 bushels).

Flax The area sown to flax is privately estimated at 1 to 1.1 million hectares (2.5 to 2.7 million acres) an increase of about 65 per cent over last year and about equal to the sowings of 1950-51. The condition of the crop continues very good and production is expected to reach at least 600,000 tons (23,621,000 bushels), double the figure last year, although only about 40 per cent of pre-war production. Stocks of flax on hand are small although some trade circles express the opinion that producers are holding some flax to sell at the higher price of 65.00 pesos per 100 kilos (\$3.30 per bushel) officially established for the 1952-53 crop.

Oats, Barley and Rye The Ministry of Agriculture have published preliminary estimates of the 1952-53 sowings to coarse grains. All show increases over last year, oats by 12 per cent, barley 17 per cent and rye 8 per cent. The following are the official estimates compared with previous years:

Grain	1952-53	1951-52	1950-51	Five-year Average 1941-42—1945-46
- thousand acres -				
Oats	3,287	2,936	3,237	4,557
Barley	2,522	2,153	2,218	1,931
Rye	5,320	4,932	5,412	3,847

*Editor's note: See page one for later information on frost damage.

Farm Workers The Argentine Ministry of Labour and Welfare has announced
Wages Increased increases ranging from 31 to 56 per cent in the scale of wages
under the "Estatuto del Peón" with a view to improving the
living conditions of farm labourers. This is part of the Government's plan to
attract farm labour back from the Industrial centers and thus increase agricul-
tural production. On the other hand, the greater cost of labour under the new
scale, which is retroactive to September 1 of this year, must be added to the
cost of production of the 1952-53 grain harvest. In this connection it will be
recalled that the producer was assured at the time of the announcement of the
official grain prices last February that these figures would be raised should
production costs rise, and this promise has been reiterated on various occasions
by President Perón and his Minister of Agriculture. It is therefore anticipated
that this year's official minimum prices for grain will be revised upwards.

The new rates of pay are grouped and classified on the same pattern as
the last revision in August, 1951. In the zone including the provinces of Buenos
Aires and Santa Fé, which comprises the greater part of the arable and pastoral
farming country lying beyond the sphere of influence of the large urban cities,
the wage for general farm labour is increased from 400 to 565 pesos per month or
41 per cent. For the same districts, the value assigned to board and lodging has
been raised from 110 to 185 pesos per month so that farm workers who receive both
board and lodging, the usual condition of employment, have their wages increased
by 31 per cent.

Restrictions Removed A joint resolution of the Ministries of Agriculture and
on Handling Grain Transport and Labour removes certain restrictions on the
harvesting of grain and transportation to port. Producers
now can utilize family labour more liberally and can employ their own vehicles,
whatever type, to transport their crops to storage and to port. This removes
many of the nuisance labour regulations that required farmers to employ local
union labour to handle grain instead of utilizing permanent labour at the farm.
Also that in transporting the crop he could not do so himself but had to employ
local union truckers.

Grain Shipments During September corn continued to constitute the greater part
of grain shipments from Argentina comprising 90,378 metric tons
of the total of 91,452 tons. France received 53,712 tons (2.1 million bushels)
of corn, the United Kingdom following with 15,801 tons (622,000 bushels),
Belgium, Finland and Switzerland receiving 9,975 tons (393,000 bushels), 8,690
tons (342,000 bushels) and 2,200 tons (87,000 bushels) respectively. The only
other grain exported was 1,074 tons (42,000 bushels) of flax destined to Germany.

The month's shipments at 91,452 tons were the highest since April last,
but nevertheless exports of grain during the first nine months of the year
aggregated only 846,149 tons, little more than one-third of shipments in the
corresponding period last year and one-fifth of those effected in the first nine
months of 1948. Wheat shipments ceased last May and totalled only 61,656 tons
(2,265,000 bushels) since the beginning of the year compared to 2,202,424 tons
(80,925,000 bushels) in the first nine months of 1951. Corn and barley shipments
showed some improvement over the low levels of the corresponding nine-month
period of 1951.

The following table gives export of grains from Argentina during the first nine months of 1952 compared to the same period in recent years:

Argentine Grain Shipments, January—September, 1952

Grain	1952	1951	1950	1949	1948
- thousand bushels -					
Wheat	2,265	80,925	86,125	52,313	66,684
Corn	19,747	5,546	30,292	27,198	65,466
Flax	1,025	6,478	1,774	-	-
Oats	2,647	4,532	19,932	7,022	4,972
Rye	4,385	6,985	5,859	6,596	5,437
Barley	4,806	3,182	3,549	7,636	27,351

France was the principal customer for Argentine grain in the first nine months of the year with 244,429 tons, followed by Sweden with 160,907 tons and Germany with 104,759 tons. Belgium, Finland and the United Kingdom received 63,313 tons, 54,120 tons and 42,008 tons respectively.

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

Argentine Grain Shipments, January—September, 1952

Destination	Wheat	Corn	Flax	Oats	Rye	Barley
- thousand bushels -						
Austria	-	779	-	-	-	-
Belgium	-	2,238	71	63	146	-
Brazil	1,049	-	-	6	-	-
Chile	-	264	49	-	-	-
Denmark	-	-	-	-	-	607
Finland	-	488	-	162	1,544	-
France	-	9,015	647	-	-	-
Germany	-	574	67	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	-	426	-	595	70	78
United Kingdom ...	-	1,647	7	-	-	-
Yugoslavia	-	289	-	-	-	-
Totals	2,265	19,747	1,025	2,647	4,385	4,806

AUSTRALIAN SITUATION

Supply Position Exports of wheat as grain from Australia during the December--September period of the current crop year amounted to 37.1 million bushels, only half as much as the 74.3 million exported during the corresponding period of 1950-51. The major outlets for Australian wheat exports for the period of the current crop year under review, with quantities in millions of bushels, were the United Kingdom (14.4), New Zealand (7.5), India (5.7), the Netherlands (2.2), Italy (1.5), and Rhodesia (1.5). Exports of wheat flour in terms of wheat for the same period amounted to 30.0 million bushels, compared with 35.0 million last year. The principal markets for this year's wheat flour exports to date have been Ceylon, Malaya, the United Kingdom, Indonesia and India. The balance remaining on September 28, 1952 for export and carryover was estimated at 29.8 million bushels, compared with 34.5 million a year ago.

Australian Wheat Supplies

Item	1951-52 <u>1/</u>	1950-51 <u>2/</u>
	- million bushels -	
Carryover at November 30 (including flour as wheat)	19.5	43.9
New crop	161.4	184.2
Total estimated supplies	180.9	228.1
Less estimated domestic requirements for crop year	84.0	84.3
Available for export and carryover	96.9	143.8
Deduct:		
Exports of wheat as grain, December 1--September 27 ..	37.1	74.3
Exports of wheat flour in terms of wheat, December 1--September 27	30.0	35.0
Total exports of wheat and wheat flour	67.1	109.3
Balance on September 28 for export and carryover	29.8	34.5

1/ Preliminary. 2/ Subject to revision.

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

"Australian wheat stocks at September 27th totalled 44,563,000 bushels. Coming harvest still estimated at 150 million bushels of which Wheat Board should receive 134 million. Amount available for export will probably be 67 million bushels of which 58 to 69 million would be available for export under IWA."

Proposed Five-Year
Wheat Stabilization
Plan Rejected

It is reported from Canberra that a special meeting of State Ministers for Agriculture with the Minister for Commerce and Agriculture rejected the new five-year wheat stabilization plan put forward by the Australian Wheat Growers' Federation.

The meeting adhered to its decision a few months ago for an interim one-year plan because of uncertainty over whether a new International Wheat Agreement would be forthcoming early next year. The meeting agreed that it be a recommendation to the Governments that there should be a further five-year plan subject to a ballot of wheat growers.

The Ministers rejected a proposal put forward by New South Wales that an extra subsidy should be paid as a special incentive to wheat growers for the 1953-54 crop.

Main points in the Ministers' interim one year scheme, which would be substantially an extension of the existing scheme, are:-

1. That the formula for assessing production costs be subject to a special review.
2. That the selling price for stock feed be the ruling International Wheat Agreement price or a related export parity.
3. That no provision be made for the payment of inter-State freight by growers.

The five-year plan proposed by the Ministers would be based on:-

1. Continuation of the Australian Wheat Board with a majority of growers.
2. A Commonwealth guarantee on exports on a basis related to the cost of production, annually reviewed, up to 100 million bushels.
3. Legislation for determining local consumption prices. Prices for wheat used for human consumption would be related to costs of production, and prices for stock feed wheat would be based on ruling export values.

The Minister for Commerce and Agriculture is reported to have stated that the Commonwealth Government was not prepared to grant an unlimited guarantee of cost of production on exports as sought by the Wheat Growers' Federation. Its guarantee would be related to a maximum of 100 million bushels in any one year as at present.

It was also proposed that there should be a non-political examination of the implications of the guarantee by a committee, including representatives of the Federation, the Treasury, the Commonwealth Department of Commerce and Agriculture and the Chairman of the Wheat Board. The Minister for Agriculture for Victoria put before the conference a detailed plan for assisting new wheat growers to go into outlying areas by helping them with rail freight rates. This scheme is to be closely considered by Commonwealth officials.

CALENDAR OF WHEAT EVENTS, OCTOBER, 1952

- 3 - The Canadian Wheat Board notified the trade that, effective this date, delivery quotas on all grades of durum wheat were removed and that producers might make deliveries of all durum wheat for which space was available. However, deliveries must still be confined to the delivery point indicated in the producer's delivery permit book.

- 10 - Stocks of wheat on United States farms at October 1 were estimated at 507 million bushels, the largest since 1948. Current farm stocks, however, are nearly 5 per cent below the ten-year average of 533 million bushels.

- 21 - In order to assist in maximum use of country storage facilities, the Canadian Wheat Board announced that it would give careful consideration to adjustment of local delivery quotas where such an adjustment was requested by all elevator agents at the delivery point.

- 23 - The Canadian Wheat Board notified the trade that it had been advised by the Transport Controller "that instructions have been issued to the railways authorizing them to accept grain loadings at any station in Manitoba or Saskatchewan, regardless of the quota in effect at the station. This action has been taken by the Transport Controller in an endeavour to move sufficient supplies of high-grade wheat to Lakehead terminals prior to the close of lake navigation, to meet commitments of this Board."

- 24 - Stocks of 1,342 million bushels of United States wheat, the second largest in history, were stored in all positions at October 1, 1952, according to the Bureau of Agricultural Economics. This year's total was only 2 per cent less than the record quantity in store at October 1, 1942, and nearly one-fifth more than a year ago.

- 25 - The Canadian Wheat Board announced that "at certain points where additional space beyond reasonable local requirements in relation to the overall position for the season becomes available, either through acquisition of offsite storage, construction of new facilities, excessive car supply, or other reasons, it may be necessary to declare such points as alternative delivery points. This would only be done after the quota at the point, in the opinion of the Board, has reached a level to warrant such action after taking all circumstances into consideration." Under this policy, wheat would be the only grain that could be delivered to an alternate delivery point.

- 28 - Broomhall reported that farmers in Spain are again seeding a good acreage to wheat under favourable conditions. This year's wheat crop was estimated at 150 million bushels, as against 160 million last year and 125 million in 1950.

- 31 - Sales recorded under the International Wheat Agreement through October 24, 1952 (except for Canadian sales which were reported through October 28) amounted to 242.2 million bushels or about 42 per cent of the total guaranteed quantities of 580.9 million bushels. Sales recorded by the exporting countries, in millions of bushels, were as follows: Canada, 117.5; United States, 89.6; and Australia, 35.1.

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