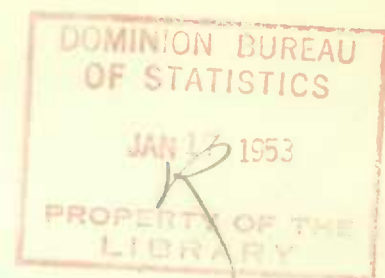


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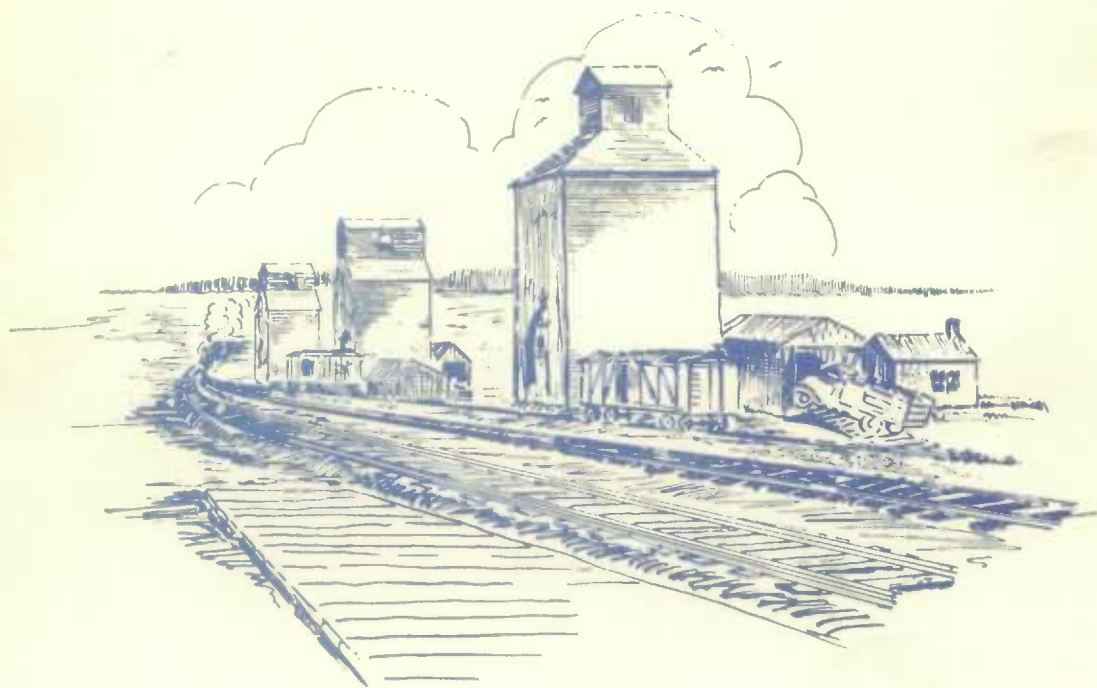


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CANADA

DOMINION BUREAU OF STATISTICS  
AGRICULTURE DIVISION

# THE WHEAT REVIEW



DECEMBER, 1952



DOMINION BUREAU OF STATISTICS

Department of Trade and Commerce

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THE  
WHEAT REVIEW

DECEMBER, 1952

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*Published by*  
Authority of the Rt. Hon. C. D. Howe  
Minister of Trade and Commerce

Prepared in the Crops Section, Agriculture Division  
Dominion Bureau of Statistics, Ottawa.

## TABLE OF CONTENTS

	Page
World Wheat Situation	
Current Supplies .....	1
Record World Breadgrain Crop Confirmed .....	1
International Wheat Council Meeting to Open January 30 .....	1
I.W.A. Sales and Purchases .....	2
Canadian Situation	
Supply Position .....	3
Change in Method of Publishing Flour Exports .....	4
Farmers' Marketings .....	5
Delivery Quotas .....	5
Visible Supply of Canadian Wheat .....	6
Grading of Wheat Inspected, August—November 1952-53 and 1951-52 .....	6
Weekly Visible Supply and Farmers' Marketings (Charts) .....	7
Lake Shipments of Canadian Grain .....	8
Canadian Delegation to International Wheat Council Meeting .....	8
Wheat Shipments to the United States by Destination .....	9
Rail Shipments of Wheat to Maritime Ports .....	9
Rail Shipments of Wheat from Fort William-Port Arthur .....	10
Freight Assistance Shipments .....	11
Monthly Export Clearances .....	12
Exports of Canadian Wheat and Wheat Flour by Destination .....	13
Canadian Wheat Board Weekly Average Cash Wheat Prices .....	15
Canadian Flour Milling Situation	
Production and Exports .....	16
United States Situation	
Supply Position .....	17
Outlook for Exports and Carryover in 1952-1953 .....	18
Acreage and production of Winter Wheat 1952-1953 .....	18
Flour Production .....	19
1952 Wheat Crop Estimated at 1,291 Million Bushels .....	19
Kansas City and Minneapolis Cash Wheat Prices .....	20
Chicago Wheat Futures .....	20
Argentine Situation .....	21
Uruguayan Situation .....	25
Australian Situation .....	26
Calendar of Wheat Events .....	28

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## WORLD WHEAT SITUATION

Current Supplies Latest available estimates indicate that supplies of wheat remaining on or about December 1, 1952 in the four major exporting countries for export and carryover at the end of their respective crop years amounted to 1,365.3 million bushels, approximately 33.5 per cent greater than the 1,022.6 million available a year ago. The larger supplies available in Canada and the United States at December 1 greatly outweighed the reduced supplies in the Argentine and Australia. However, the supplies shown for December 1 in the two Southern Hemisphere countries consisted only of the carryover at the end of their crop years. The supply data to appear in the January issue of this publication will include the new Argentine and Australian crops. Preliminary estimates of these new crops indicate that their combined total may amount to some 420 million bushels as against 236.7 million for the previous crop.

Supplies at December 1, 1952 (in millions of bushels) were held as follows, with last year's figures in brackets: United States, 747.0 (530.9); Canada, 603.0 (453.8); Australia, 15.3 (19.5), and Argentina, 0.0 (18.4). Estimates for both years include on-farm stocks as well as those in commercial positions.

Record World Bread-grain Crop Confirmed According to the December 15 issue of Foreign Crops and Markets "World breadgrain production in 1952-53 is now estimated at 261 million short tons, based on latest information available to the Office of Foreign Agricultural Relations. The current estimate compares with the previous record crop of 248 million tons in 1938-39 and exceeds by about 3 million tons the record forecast published in Foreign Crops and Markets of September 22. The bulk of the increase from the earlier forecast results from upward revisions in estimates for Canada and improved outlook for the wheat harvest now under way in Argentina and Australia.

The world wheat crop is now estimated at 7,235 million bushels compared with the total of 6,480 million for 1951-52 and the previous record of 6,610 million in 1938-39. Significantly, the increases over last season's crop are largely in the exporting countries. Sizable increases are noted for Canada, the United States and Argentina. Increases among the smaller exporters include France, Turkey and French North Africa."

International Wheat Council Meeting to Open January 30 The International Wheat Council has advised its member governments that the proposed meeting in Washington, D.C., will open January 30, 1953, instead of January 12 as previously announced.

The first two days of the meeting will be devoted to Council business covering the first half of the 1952-53 crop year. Negotiations on renewal of the International Wheat Agreement, which expires July 31, 1953, will then be resumed. Discussion regarding renewal began at a meeting at Council headquarters in London last April-May. At that time it was decided that certain changes in the present Agreement were desirable and that fuller examination was required of some of the factors affecting price provisions.

The International Wheat Council is composed of representatives of forty-six countries with a major interest in international wheat trade. Of these, four are wheat-exporting and forty-two are wheat-importing countries.



## 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	-	-	-	2,915	2,915	8,108
Belgium .....	20,209	9,489	-	-	2,689	12,178	8,031
Bolivia 5/ .....	2,756	2,292	-	-	320	2,612	-
Brazil .....	13,228	2,546	-	-	5,016	7,562	5,666
Ceylon 5/ .....	6,614	-	5,781	-	483	6,264	-
Costa Rica .....	1,213	280	-	-	379	659	554
Cuba .....	7,422	1,533	-	-	2,106	3,639	3,783
Denmark .....	1,617	812	-	-	533	1,345	272
Dominican Republic ..	876	202	-	-	395	597	279
Ecuador .....	1,286	596	-	-	595	1,191	95
Egypt 5/ .....	14,697	6,602	-	-	7,514	14,116	-
El Salvador .....	404	96	-	-	208	304	100
Germany .....	66,139	4,964	1,356	1,837	28,324	36,481	29,658
Greece .....	15,726	-	-	-	2,939	2,939	12,787
Guatemala .....	919	206	-	-	336	542	377
Haiti .....	1,029	72	-	-	503	575	454
Honduras Republic ...	367	67	-	-	204	271	96
Iceland .....	404	21	-	-	105	126	278
India .....	55,116	11,200	8,587	-	7,751	27,538	27,578
Indonesia 5/ .....	3,674	54	2,360	-	1,076	3,490	-
Ireland .....	10,104	5,600	2,496	-	930	9,026	1,078
Israel 5/ .....	5,879	2,128	-	-	3,493	5,621	-
Italy .....	40,418	11,023	352	-	8,078	19,453	20,965
Japan .....	18,372	3,674	1,168	-	4,399	9,241	9,131
Lebanon .....	2,388	372	-	-	1,586	1,958	430
Liberia 5/ .....	37	19	-	-	16	35	-
Mexico .....	12,860	-	-	-	5,166	5,166	7,694
Netherlands .....	24,802	7,918	797	-	9,732	18,447	6,355
New Zealand .....	4,593	-	4,340	-	-	4,340	253
Nicaragua .....	331	114	-	-	151	265	66
Norway .....	7,716	2,987	611	-	3,073	6,671	1,045
Panama 5/ .....	625	487	-	-	107	594	-
Peru 5/ .....	5,512	2,202	-	-	3,042	5,244	-
Philippines .....	7,202	2,350	-	-	2,013	4,363	2,839
Portugal .....	5,626	703	13	-	4,543	5,259	367
Saudi Arabia .....	1,837	-	13	-	391	404	1,433
Spain .....	4,373	-	-	-	1,709	1,709	2,664
Sweden .....	2,756	-	299	-	1,678	1,977	779
Switzerland .....	6,430	3,674	-	-	1,761	5,435	995
Union of South Africa	11,023	7,280	-	-	2,389	9,669	1,354
United Kingdom .....	177,068	51,290	30,075	-	11,250	92,615	84,453
Venezuela .....	6,246	1,592	-	-	1,268	2,860	3,386
Totals .....	580,917	144,445	58,248	1,837	131,166	335,696	
Guaranteed Quantities (Exporting Countries)		235,000	88,700	4,089	253,128	580,917	
Balance .....		90,555	30,452	2,252	121,962	245,221	

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

2/ Canadian sales through December 29th, 1952.

3/ Sales recorded by International Wheat Council through December 19th, 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/ Ninety-five per cent of quota filled.

## CANADIAN SITUATION

Supply Position - Visible supplies of Canadian wheat on December 18, the date on which the last vessel cleared the Lakehead during the 1952 lake navigation season, totalled 249.8 million bushels. Supplies on approximately the same date in the two preceding years were just under the 221 million bushel level.

Extension of the 1952 lake navigation season beyond the normal closing date has improved considerably the supply situation in most Eastern positions. Supplies at Bay, Lake and Upper St. Lawrence ports on December 18, 1952 amounted to 27.9 million bushels as against 23.5 million in 1951 and 16.8 million in 1950. Although supplies in Lower St. Lawrence and Maritime ports, at 6.6 million bushels, were below the 1951 level of 7.8 million, they were above the 1950 total of 4.0 million. In addition, some 15.8 million bushels were in lake transit to Eastern positions on December 18, 1952 whereas at the same date in both 1950 and 1951 the lake navigation season had ended.

### 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 .....	687.9	552.7
Imports of wheat, August-October .....	<u>3/</u>	<u>3/</u>
Total estimated supplies .....	900.9	741.9
Less estimated domestic requirements for crop year .....	<u>160.0</u>	<u>173.1</u>
Available for export and carryover .....	740.9	568.8
Deduct:		
Overseas clearances of wheat as grain,		
August-November .....	105.7	87.2
Exports of Canadian wheat to U.S.,		
August-November .....	<u>12.5</u>	<u>14.1</u>
Total exports of wheat .....	118.2	101.4
Exports of wheat flour in terms of wheat,		
August-November .....	<u>19.7</u>	<u>13.6 <u>4/</u></u>
Total exports of wheat and wheat flour .....	137.9	115.0
Balance on December 1 for export and carryover .....	603.0	453.8

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

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

The concerted effort to move as much grain as possible before the close of navigation reduced wheat stocks in Lakehead terminals to 11.2 million bushels on December 18, 1952. Comparable figures for the preceding two years were 20.1 million and 26.0 million bushels, respectively. Stocks of wheat in country elevators on



December 18, 1952 amounted to 144.5 million bushels as against 108.3 million and 134.5 million bushels on approximately the same date in 1951 and 1950, respectively. Every effort is being made to move stocks from country elevators to terminals as quickly as possible to provide space for the delivery of the large quantities of grain currently held on Western farms. Up to December 18 of the current crop year farmers' deliveries of wheat amounted to 236.6 million bushels, as against 214.0 million for the comparable period of 1951-52.

Exports of wheat as grain during November 1952 amounted to 38.0 million bushels, the highest since July and almost 11.0 million greater than the October total. This year's November exports were also greater than those of the same month in recent years, exceeding the November 1951 total of 35.5 million bushels by 2.5 million and more than doubling the November 1950 total of 17.8 million. Preliminary data indicate an additional 5.1 million bushels were exported in the form of wheat flour during November 1952 as against adjusted totals of 4.0 million and 5.7 million in the same month in 1951 and 1950, respectively. Total exports of wheat and wheat flour in terms of wheat during the month were 43.1 million bushels.

Combined exports of wheat and wheat flour in terms of wheat during the August—November period of 1952-53 amounted to 137.9 million bushels, an increase of 19.9 per cent over the 115.0 million exported during the first four months of 1951-52. Of this year's total, exports of wheat as grain accounted for some 118.2 million bushels, representing an increase of 16.6 per cent over the 101.4 million bushels of wheat exported during the four months ending November 30, 1951.

Some 25.1 million bushels, accounting for 21.2 per cent of this year's August—November exports of wheat as grain, 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, 12.6; the United States, 12.5 (of which 2.6 million were for milling in bond); Belgium, 11.0; Yugoslavia, 7.6; the Netherlands, 6.2; and Italy, 5.1. Altogether, shipments of Canadian wheat as grain have gone to thirty-seven countries and colonies during the four months ending November 30, 1952. Preliminary data indicate that exports of wheat flour in terms of wheat for the first four months of 1952-53 amounted to 19.7 million bushels as against an adjusted total of 13.6 million for the comparable period last year.

The balance remaining on December 1, 1952 for export and carryover was estimated at 603.0 million bushels, an increase of 32.9 per cent over the 453.8 million available a year ago.

Change in Method  
of Publishing  
Flour Exports

A certain amount of confusion has apparently resulted from the method employed in "The Wheat Review" of reporting cumulative exports of wheat flour from Canada. To obviate this the following changes in procedure will become effective immediately:

In the table entitled "Monthly Export Clearances, etc. in Comparison with the Customs Exports of Wheat and Wheat Flour" under the column headed 'Customs Exports of Canadian Wheat Flour' the practice of publishing time-lag adjusted figures for each month as soon as they become available will be discontinued. In future the figures shown for all months during the current crop year will be unadjusted export figures as they appear in the "Trade of Canada". Moreover, the adjusted monthly data for any crop year will not appear in this table until the issue for November of the following crop year, by which time final adjustments for exports in July (the last month of the crop year) will be (continued on page 27)



Farmers' Marketings

Deliveries of wheat by farmers in Western Canada from August 1 to December 18 of the current crop year amounted to 236.6 million bushels as against 214.0 for the corresponding period last year. Marketings have continued at a fairly uniform rate during the period under review with receipts for the weeks ending November 27, December 4, 11, and 18 amounting to 12.4, 9.9, 11.0 and 11.0 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
	23 ...	916,507	7,180,359	3,662,333	11,759,199	27,209,381
	30 ...	917,626	5,150,812	2,563,512	8,631,950	13,773,440
November	6 ...	2,318,994	6,420,954	2,935,288	11,675,236	9,465,279
	13 ...	1,905,372	7,571,378	2,969,211	12,445,961	7,645,329
	20 ...	1,829,784	7,621,546	2,858,916	12,310,246	8,024,765
	27 ...	1,542,787	8,128,934	2,773,031	12,444,752	8,167,976
December	4 ...	1,071,012	6,433,981	2,435,503	9,940,496	10,343,181
	11 ...	1,012,732	7,353,877	2,633,921	11,000,530	10,603,977
	18 ...	1,005,219	7,315,274	2,673,219	10,993,712	6,950,882
Totals ...		29,242,101	144,834,378	62,508,961	236,585,440	213,966,220

Delivery Quotas

The Canadian Wheat Board's December 24 summary of the number of country shipping points in each quota group indicated that only three still remained on the initial quota of 5 bushels per seeded acre. On the current maximum group of 15 bushels per seeded acre, 589 points were listed on December 24 as against 375 on November 26.

Summary of Elevator Shipping Points in Each Quota Group  
for Wheat in the Western Division as at December 24, 1952

Province	Quota in Bushels Per Seeded Acre					Open	Total
	5	8	10	12	15		
Ontario .....	-	-	-	-	-	2	2
Manitoba .....	-	-	-	-	380	-	380
Saskatchewan .....	3	403	524	101	78	-	1,109
Alberta .....	-	75	255	122	131	-	583
British Columbia ...	-	-	2	-	-	2	4
Totals .....	3	478	781	223	589	4	2,078

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

Position	1952	1951	1950
- thousand bushels -			
Country elevators - Manitoba .....	8,451	6,004	11,750
Saskatchewan .....	86,934	68,658	74,451
Alberta .....	49,096	33,603	48,292
Totals .....	144,480	108,264	134,493
Interior private and mill elevators .....	5,350	4,806	4,323
Interior terminals .....	6,161	10,083	6,941
Vancouver-New Westminster .....	7,876	8,444	7,370
Prince Rupert .....	-	746	-
Churchill .....	2,048	1,997	461
Fort William-Port Arthur .....	11,161	20,128	26,034
Storage afloat .....	313	-	-
In transit rail (Western Division) .....	15,422	15,035	8,603
Bay, Lake and Upper St. Lawrence ports ....	27,897	23,504	16,830
Lower St. Lawrence and Maritime ports ....	6,604	7,822	4,047
In transit lake .....	15,786	-	-
Storage afloat .....	-	10,955	6,825
In transit rail (Eastern Division) .....	2,298	2,497	2,211
United States ports .....	4,452	6,185	2,652
In transit U.S.A. ....	-	323	186
Totals .....	249,846	220,789	220,975

Grading of Wheat Inspected, August—November, 1952-53 with Comparisons

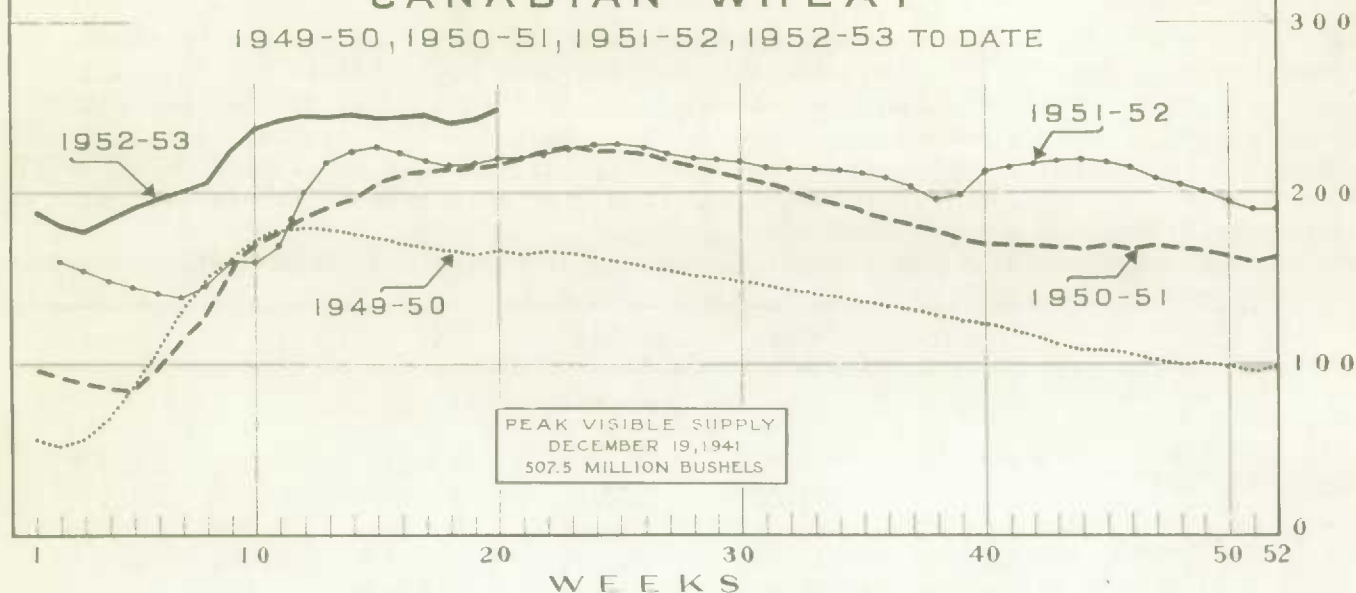
Grade	August—November				Average
	1952-53		1951-52		1946-47— 1950-51
	cars	per cent	cars	per cent	per cent
1 Hard .....	48	4/	-	-	4/
1 Northern .....	7,093	7.5	814	0.9	14.8
2 Northern .....	21,757	23.0	6,363	7.2	37.6
3 Northern .....	18,129	19.2	14,900	16.9	13.0
4 Northern .....	11,762	12.4	9,199	10.4	4.4
5 Wheat .....	13,382	14.1	9,840	11.2	3.7
6 Wheat .....	4,922	5.2	8,217	9.3	2.2
Feed Wheat .....	731	0.8	1,170	1.3	0.4
Garnet .....	309	0.3	351	0.4	0.9
Amber Durum .....	2,626	2.8	1,743	2.0	3.5
Alberta Winter .....	197	0.2	240	0.3	0.7
Toughs 1/ 2/ .....	12,251	13.0	29,470	33.4	15.6
Damps 1/ 3/ .....	44	4/	4,894	5.6	1.3
Rejected 1/ .....	929	1.0	546	0.6	-
All Others .....	417	0.4	404	0.5	1.9
Totals .....	94,597	100.0	88,151	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

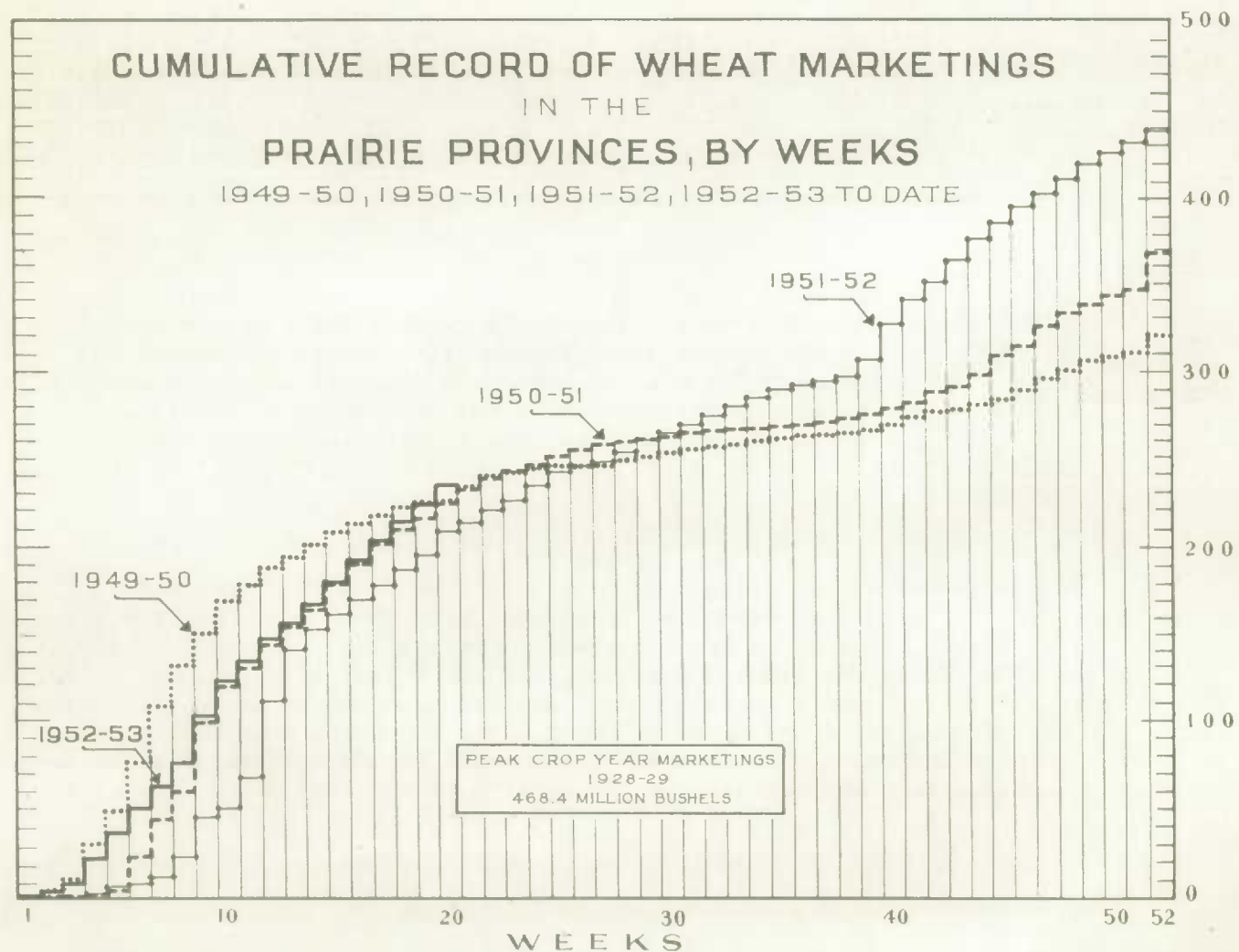
## WEEKLY VISIBLE SUPPLY OF CANADIAN WHEAT

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)



Lake Shipments The 1952 navigation season at the Lakehead closed on December 18, with the sailing of the S. S. Mohawk Deer. This was three days later than last year's closing but was still short of the record established in 1923 when the season closed on December 24.

During the 1952 navigation season some 450.8 million bushels of wheat, oats, barley, rye and flaxseed were shipped from Fort William-Port Arthur. This is the highest level of shipments reached since 1945 when 483.7 million bushels were cleared from the Lakehead. While neither the 1952 wheat or total grain movement established a seasonal record, the figures for oats (93.2 million bushels) and barley (96.4 million) represented all-time high shipments for these grains.

Lake Shipments of Canadian Grain, Season of Navigation, 1942—1952

Year	Wheat	Oats	Barley	Rye	Flaxseed	Total
- thousand bushels -						
1942 .....	178,511	17,042	10,510	1,029	4,040	211,132
1943 .....	246,159	39,407	44,034	5,439	8,876	343,915
1944 .....	304,249	80,011	56,343	8,156	7,205	455,964
1945 .....	344,406	84,928	45,186	4,828	4,384	483,732
1946 .....	147,431	56,006	30,777	3,771	2,185	240,170
1947 .....	167,334	46,860	29,827	9,909	2,465	256,395
1948 .....	133,422	37,611	33,564	6,809	8,353	219,759
1949 .....	164,195	44,074	35,635	12,583	8,490	264,976
1950 .....	137,048	27,358	26,762	7,219	3,502	201,889
1951 .....	201,424	58,325	48,332	7,014	2,194	317,288
1952 .....	246,093	93,173	96,394	9,089	6,058	450,808

Canadian Delegation to  
International Wheat  
Council Meeting

Canada's delegation at the renewal talks on the International Wheat Agreement, to begin in Washington, January 30, will be headed by Mitchell Sharpe, Associate Deputy Minister of Trade and Commerce. Alternate delegates are W. C. McNamara, Assistant Chief Commissioner of the Canadian Wheat Board and Dr. C. F. Wilson, Agricultural Counsellor, Canadian Embassy, Rome.

Five advisers to the delegation have been named from among producer organizations. They are J. E. Brownlee, President, the United Grain Growers Limited, W. F. Parker, President, Manitoba Pool Elevators, J. H. Wesson, President, Saskatchewan Wheat Pool, Ben Plumer, Chairman, Alberta Wheat Pool, and Wes Coates, Vice-President, Saskatchewan Farmers' Union. Additional advisers are C. C. Boxer, Washington representative of the Canadian Wheat Board and H. B. Monk, Solicitor for the Canadian Wheat Board. In addition to the official delegation, the following will probably attend as observers: H. L. Griffin, The United Grain Growers Limited, M. M. Porter, Alberta Wheat Pool and George Robertson, Saskatchewan Wheat Pool.

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

Destination	1952	1951	1950
- bushels -			
<u>By Vessel</u>			
Duluth-Superior .....	2,643,223	4,264,331	978,121
Milwaukee .....	-	298,326	140,673
Chicago .....	313,443	1,161,571	269,510
Detroit .....	-	-	287,165
Huron .....	320,734	-	-
Erie .....	276,567	93,107	-
Buffalo .....	11,446,101	14,635,273	7,121,643
Oswego .....	1,102,391	514,005	-
Totals, Vessel .....	16,102,459	20,966,613	8,797,112
<u>By Rail</u>			
U.S.A. Seaboard Ports .....	-	315,000	54,835
Other U.S.A. Points .....	2,579,054	1,967,935	310,664
Totals, Rail .....	2,579,054	2,282,935	365,499
Totals, Shipments .....	18,681,513	23,249,548	9,162,611

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

Wheat shipments to the United States, either for re-export or retention, have been moving in considerable volume, with the total from the beginning of the current crop year to December 18 amounting to 18.7 million bushels. Shipments for the comparable periods of 1951 and 1950 were 23.2 million and 9.2 million, respectively.

Of the 16.1 million bushels shipped by vessel during the current crop year, 11.4 million went to Buffalo. The next largest volume of lake shipments, 2.6 million bushels, went to Duluth-Superior, with the remainder going to Oswego, Huron, Chicago and Erie. Rail shipments, at 2.6 million bushels, exceed those of the corresponding periods of 1951 and 1950 when 2.3 million and 0.4 million, respectively were moved into the United States by rail.

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

Ports	August 1 to November 30, 1952	August 1 to November 30, 1951
- bushels -		
Midland .....	-	659,852
Owen Sound .....	-	41,231
Port McNicoll .....	-	507,490
Goderich .....	-	123,745
Sarnia .....	55,500	-
Prescott .....	-	1,500
Totals .....	55,500	1,333,818

# Rail Shipments of Wheat from Fort William-Port Arthur, 1949-50—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 .....	936,757	159,667	73,543	122,482
November .....	651,957	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 November amounted to some 652,000 bushels as against 937,000 in October and 1,181,000 in September. However, both the November and August—November shipments of the current crop year were well above those for the corresponding periods of recent years. In the first four months of 1952-53 total wheat shipments from the Lakehead by rail amounted to almost 3.0 million bushels compared with 1.3 million and 0.5 million during the August—November periods of 1951-52 and 1950-51, respectively. Although the extension of the lake navigation season for about a week beyond the normal closing date will relieve to some extent the pressure on moving wheat by rail from the Lakehead during the winter months, it is expected that substantial rail shipments will be made to Eastern seaboard positions.

Distribution of the November 1952 shipments by grade and destination is shown in the table below. As in the preceding month, the bulk of the November shipments was made up of Amber Durum, with most of it going to West Sain John and St. Lawrence ports.

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

Grade	P.E.I.	N.S.	N.B.	Que.	Ont.
- bushels -					
5 Wheat .....	-	-	-	5,833	4,167
6 Wheat .....	-	-	-	-	667
Amber Durum .....	-	96,000	167,000	185,381	90,979
Alberta Winter .....	-	-	-	-	10,333
Toughs .....	-	-	-	5,486	8,000
All Others .....	500	-	7,500	33,833	36,278
Totals .....	500	96,000	174,500	230,533	150,424



Freight Assistance Shipments Claims filed for payment up to November 30, 1952 represent shipments of 3.4 million bushels of wheat from the Prairie Provinces to Eastern Canada and British Columbia under the freight assistance plan during the first three months of the current crop year. During the same period last year claims had been filed for 3.2 million bushels, indicating an apparent increase in wheat movements under the plan during the first quarter of 1952-53. Revised data on the August-October 1951 shipments, based on claims submitted up to November 30, 1952, place the three-month total at 4.1 million bushels, with about 73 per cent of the total going to destinations in Quebec and Ontario.

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

Month	Nfld.	P.E.I.	N.S.	N.B.	Que.	Ont.	B.C.	Total
- thousand bushels -								
August, 1952 .....	11	32	70	63	536	486	131	1,328
September .....	11	20	66	48	524	461	93	1,222
October .....	3	5	52	33	361	349	46	848
Totals <u>1/</u> .....	25	56	189	144	1,421	1,295	269	3,399
Same period 1951-52								
Preliminary <u>2/</u> ..	7	50	159	123	1,350	1,251	254	3,194
Revised <u>1/</u> .....	15	59	193	151	1,539	1,416	701	4,074

Preliminary data on millfeeds moving under the freight assistance plan represent shipments of 106,052 tons during the August-October period of the current crop year. This total, based on claims filed up to November 30, 1952, is some 14 per cent above the preliminary total based on claims submitted during the comparable period of 1951-52. As with wheat, data on freight-assisted mill-feed shipments are subject to revision as additional claims are filed for payment.

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

Province	1952-53	1951-52	
	Preliminary <u>1/</u>	Preliminary <u>2/</u>	Revised <u>1/</u>
- tons -			
Newfoundland .....	731	521	864
Prince Edward Island .....	1,508	1,278	1,807
Nova Scotia .....	7,429	7,440	10,455
New Brunswick .....	7,426	6,731	9,143
Quebec .....	55,386	45,111	64,658
Ontario .....	29,021	26,285	37,893
British Columbia .....	4,551	5,528	13,614
Totals .....	106,052	92,894	138,434

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

2/ Based on claims filed up to November 30, 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	6,101	44,425	40,894
July .....	34,478	3,818	4,639	42,935	44,782
Totals .....	266,039	38,683	51,103	355,825	358,803
<u>1952-53 <u>5/</u></u>					
August .....	26,089	2,559	3,364	32,011	38,946
September .....	21,208	3,312	4,960	29,480	27,326
October .....	24,106	2,950	6,277	33,332	35,611
November .....	34,339	3,677	5,052	43,068	36,052
Totals .....	105,742	12,497	19,652	137,891	137,934

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

2/ Compiled by the Statistics Branch, Board of Grain Commissioners for Canada, from returns of Canadian elevator licensees and shippers and advice from American grain correspondents.

3/ Exports for crop years 1950-51 and 1951-52 revised to remove effect of time lag in the returns made by Customs.

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

5/ Subject to revision.

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

Destination	August	November		August—November*	
	Wheat Flour 1/2/ - bushels -	Wheat Flour 2/ - bushels -	Wheat 3/ - bushels -	Wheat Flour 2/ - bushels -	Wheat 3/ - bushels -
<b>COMMONWEALTH COUNTRIES</b>					
United Kingdom .....	715,788	2,172,924	6,962,551	7,109,465	25,078,975
<b>Africa</b>					
Gambia .....	549	504	-	1,053	-
Nigeria .....	15,210	9,454	-	57,874	-
Sierra Leone .....	4,041	2,011	-	10,300	-
<b>Asia</b>					
British Malaya .....	27,423	37,850	-	139,545	-
Ceylon .....	480,002	-	-	486,491	-
Hong Kong .....	191,862	220,648	-	645,759	2,417
India .....	-	-	-	90	2,782,090
<b>Europe</b>					
Gibraltar .....	15,377	15,422	-	43,974	-
Malta .....	-	-	350,933	-	723,333
<b>North America</b>					
Bahamas .....	24,970	26,860	-	89,572	-
Barbados .....	40,658	24,291	-	152,766	850
Bermuda .....	8,158	9,774	-	35,199	-
British Honduras .....	6,849	5,548	-	18,661	-
Jamaica .....	230,211	6,953	-	263,691	-
Leeward and Windward Islands .....	92,907	130,914	-	380,898	-
Trinidad and Tobago .....	218,624	161,532	-	699,017	-
<b>South America</b>					
British Guiana .....	117,400	68,891	-	348,012	-
Totals, Commonwealth Countries ...	2,190,029	2,893,576	7,313,484	10,482,367	28,587,665
<b>FOREIGN COUNTRIES</b>					
<b>Africa</b>					
Azores and Madeira .....	-	5,593	-	16,155	-
Belgian Congo .....	3,064	-	-	3,524	-
Egypt .....	528,485	613,287	1,056,530	3,933,743	2,507,063
French Africa .....	3,582	-	-	9,320	-
Liberia .....	1,084	459	-	4,720	-
Morocco .....	68,922	50,134	-	219,546	-
Portuguese Africa .....	914	3,596	74,107	9,567	111,440
Spanish Africa .....	-	7,578	-	7,578	-
Tripoli .....	-	-	-	-	224,000
<b>Asia</b>					
Arabia .....	3,438	1,836	-	33,228	-
China .....	-	-	-	4,360	59,583
Indonesia .....	-	41,188	-	49,221	-
Israel .....	-	-	372,400	-	1,064,000
Japan .....	76,113	36,743	2,153,987	137,633	4,282,123
Lebanon .....	17,937	600,593	352,800	995,666	1,587,467
Pakistan .....	-	-	1,571,474	-	2,240,274
Philippine Islands .....	467,294	475,083	-	1,787,067	-
Portuguese Asia .....	17,636	32,000	-	42,120	-
Siam .....	9,472	39,105	-	131,845	-
Syria .....	50	-	-	49	-
<b>Europe</b>					
Belgium .....	-	-	3,323,514	-	10,976,439
Denmark .....	-	-	431,267	-	1,112,867
France .....	-	-	-	-	1,287,165
Germany .....	-	13,955	340,035	13,955	12,625,710
Greece .....	-	-	-	-	698,163
Iceland .....	-	-	-	22,774	-
Ireland .....	-	-	1,638,879	-	3,076,867
Italy .....	3,213	5,832	2,521,252	24,899	5,090,499
Netherlands .....	-	-	2,691,447	-	6,174,962



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

Destination	August	November		August—November*	
	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>					
Norway .....	-	-	841,048	-	1,861,255
Portugal .....	459	1,642	336,000	7,384	336,000
Sweden .....	-	-	-	-	734,084
Switzerland .....	-	-	1,814,618	-	4,484,159
Yugoslavia .....	1,035	3,213	4,383,446	7,578	7,649,146
<u>North America</u>					
Alaska .....	-	-	-	9	-
Costa Rica .....	62,411	6,309	-	191,327	33,333
Cuba .....	1,606	31,194	350,789	52,888	363,880
Dominican Republic .....	26,734	1,436	-	39,749	-
El Salvador .....	25,492	1,080	-	83,066	-
French West Indies .....	194	-	-	3,114	-
Guatemala .....	27,567	5,814	-	92,291	-
Haiti .....	13,810	24,394	-	83,592	-
Honduras .....	-	459	-	459	6,667
Netherlands Antilles .....	11,961	10,607	-	48,452	-
Nicaragua .....	18,688	7,326	-	48,434	-
Panama .....	5,364	12,267	-	111,298	-
St. Pierre and Miquelon .....	-	-	-	5,827	-
United States					
Flour in terms of wheat .....	11,196	9	-	17,599	-
For grinding in bond 4/ .....	-	-	594,767	-	2,551,081
For domestic use 4/ .....	-	-	3,081,983	-	9,946,029
Virgin Islands .....	2,295	-	-	4,936	-
<u>Oceania</u>					
Hawaii .....	-	-	-	117	-
<u>South America</u>					
Argentina .....	4	-	-	4	-
Bolivia .....	-	-	20,623	2,295	729,956
Brazil .....	-	-	2,331,439	-	4,486,611
Chile .....	-	-	-	-	1,477,534
Colombia .....	13,320	20,011	20,000	58,122	82,605
Ecuador .....	41,553	3,830	41,703	50,891	83,405
Peru .....	11,480	3,442	358,400	24,106	1,706,899
Surinam .....	7,299	14,211	-	48,955	-
Venezuela .....	357,287	84,019	-	740,466	-
Totals, Foreign Countries .....	1,840,959	2,158,245	30,702,508	9,169,929	89,651,266
Totals, Exported .....	4,030,988	5,051,821	38,015,992	19,652,296	118,238,931

1/ Adjusted to remove effect of time lag in the returns made by Customs.

2/ In terms of wheat equivalent. Source: Canadian Customs returns. Conversion rate: 4 1/2 bushels of wheat equal 1 barrel of 196 pounds of wheat flour.

3/ Overseas clearances as reported by the Statistics Branch, Board of Grain Commissioners for Canada, for all countries except the United States. Subject to revision.

4/ Compiled from returns of Canadian elevator licensees and shippers and advice from American grain correspondents.

\*Due to adjustments in data on destinations, the October wheat export figures as published in the November issue of *The Wheat Review* should read: Japan, 2,128,136 bushels and Pakistan, 668,800 bushels.

**NOTE:** Please see page 4 for details of change in method of publishing Canadian wheat flour exports.

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

Class and Grade	Week ending				
	Nov. 29	Dec. 6	Dec. 13	Dec. 20	Dec. 27
- cents and eighths per bushel -					
<u>Initial Payment to Producers 1952-53 Pool</u>					
1 Hard .....	140	140	140	140	140
1 Northern .....	140	140	140	140	140
2 Northern .....	137	137	137	137	137
3 Northern .....	134	134	134	134	134
4 Northern .....	126	126	126	126	126
5 Wheat .....	116	116	116	116	116
6 Wheat .....	106	106	106	106	106
Feed Wheat .....	100	100	100	100	100
<u>Domestic and Export 1/</u> (International Wheat Agreement)					
1 Hard .....	175/6	175/1	174/6	174/6	174/4
1 Northern .....	175/6	175/1	174/6	174/6	174/4
2 Northern .....	173/6	173/1	172/6	172/6	172/4
3 Northern .....	171/6	171/1	170/6	170/6	170/4
4 Northern .....	165/6	165/1	164/6	164/6	164/4
5 Wheat .....	156/6	156/1	155/6	155/6	155/4
6 Wheat .....	155/6	155/1	154/6	154/6	154/4
Feed Wheat .....	150/6	150/1	149/6	149/6	149/4
1 C.W. Garnet .....	173/6	173/1	172/6	172/6	172/4
2 C.W. Garnet .....	172/6	172/1	171/6	171/6	171/4
3 C.W. Garnet .....	169/6	169/1	168/6	168/6	168/4
1 Alberta Red Winter .....	175/6	175/1	174/6	174/6	174/4
2 Alberta Winter .....	173/6	173/1	172/6	172/6	172/4
3 Alberta Winter .....	171/6	171/1	170/6	170/6	170/4
1 C.W. Amber Durum .....	175/6	175/1	174/6	174/6	174/4
2 C.W. Amber Durum .....	173/6	173/1	172/6	172/6	172/4
3 C.W. Amber Durum .....	172/6	172/1	171/6	171/6	171/4
<u>Export - Class II</u>					
1 Hard .....	225/1	223/1	222/4	220/6	219/4
1 Northern .....	225/1	223/1	222/4	220/6	219/4
2 Northern .....	223/1	221/1	220/4	218/6	217/4
3 Northern .....	221/1	219/1	218/4	216/6	215/4
4 Northern .....	215/1	213/1	212/4	210/6	209/4
5 Wheat .....	162/6	162/1	161/6	161/6	161/4
6 Wheat .....	161/6	161/1	160/6	160/6	160/4
Feed Wheat .....	156/6	156/1	155/6	155/6	155/4
1 C.W. Amber Durum .....	240/6	242/1	245/7	254/7	254/4
2 C.W. Amber Durum .....	238/6	240/1	243/7	252/7	252/4
3 C.W. Amber Durum .....	237/6	239/1	242/7	251/7	251/4

1/ Plus 6 cents carrying charge.

## CANADIAN FLOUR MILLING SITUATION

Production Wheat flour production reported by Canadian mills for November 1952 amounted to some 2,183,000 barrels down somewhat from the October output of 2,302,000 but well above the November 1951 level of 1,949,000 barrels. The ten-year (1942--1951) average production for November was 2,136,000 barrels. Mills reporting operations during November this year had a rated daily capacity of 97,240 barrels and on the basis of a 25-day working period, 89.8 per cent of this rated capacity was effective.

Wheat milled for flour during November 1952 amounted to 9.9 million bushels. Some 9.1 million bushels of this total were Western spring wheat (other than durum). Most of the balance consisted of Ontario winter wheat (461,000 bushels) and durum wheat (132,000 bushels).

Exports According to preliminary Customs returns, exports of Canadian wheat flour during November amounted to 1,122,627 barrels (5,052,000 bushels of wheat equivalent). Flour shipments during the month were reported to forty-eight countries and colonies, with the largest amounts, 2.2 million bushels, 613,000 bushels and 601,000 bushels, going to the United Kingdom, Egypt and Lebanon, respectively. Other major shipments, in thousands of bushels of wheat equivalent, went to the Philippine Islands (475), Hong Kong (221), Trinidad and Tobago (162), and Leeward and Windward Islands (131).

### 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	11,356,288
1952-53 <sup>2/</sup>			
August .....	8,809,102	1,943,274	747,518
September .....	9,557,709	2,120,469	1,102,225
October .....	10,330,803	2,302,489	1,394,807
November .....	9,858,945	2,182,652	1,122,627
Totals .....	38,556,559	8,548,884	4,367,177
Same period 1951-52(Revised) .....	33,702,093	7,369,433	3,025,891

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

<sup>2/</sup> Wheat milled for flour and wheat flour production subject to revision from January 1952.



## UNITED STATES SITUATION

Supply Position Revised production, carryover and domestic consumption estimates have resulted in minor changes in the statistical position of United States wheat supplies for both 1951-52 and 1952-53. The 1951 production of all wheat is now placed at 980.8 million bushels while the 1952 outturn is estimated at 1,291.4 million. Each of these figures is some 7 million bushels below the previous estimate. Total supplies for the current crop year are now placed at 1,561.7 million bushels as against 1,391.2 million for 1951-52. These data, however, include imports for the July—November period only of each crop year and the final estimate of supplies will be increased by whatever quantities are imported in the December—June period. In 1951-52 some 15.9 million bushels of wheat were imported in the seven months, December to June.

### United States Wheat Supplies

Item	1952-53 <u>1/</u>	1951-52
	- million bushels -	
Carryover at July 1 .....	257.0 <u>2/</u>	396.2
New crop .....	1,291.4 <u>3/</u>	980.8 <u>2/</u>
Total estimated domestic supplies .....	1,548.4	1,377.0
Imports of wheat for domestic use, July—November .....	13.3	14.2
Total estimated supplies <u>4/</u> .....	1,561.7	1,391.2
Less estimated domestic requirements for crop year <u>5/</u> ....	690.0 <u>2/</u>	676.3 <u>2/</u>
Available for export and carryover .....	871.7	714.9
Deduct:		
Exports of wheat as grain, July—November .....	108.8	166.7
Exports of wheat flour and macaroni in terms of wheat, July—November .....	15.9	17.3
Total exports of wheat, wheat flour and macaroni ....	124.7	184.0
Balance on December 1 for export and carryover .....	747.0	530.9

1/ Preliminary. 2/ Revised. 3/ Official estimate as of December 1, 1952.

4/ Excluding imports for November—June period. 5/ 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—November period of the current crop year amounted to 108.8 million bushels, a decrease of about 35 per cent from the 166.7 million bushels exported during the corresponding period last year. Exports of wheat flour and macaroni in terms of wheat at 15.9 million bushels were also down in comparison with the 17.3 million exported during July—November 1951. After deducting estimated domestic requirements for the crop year together with exports of wheat, wheat flour and macaroni for the first five months of the crop year, the balance remaining on December 1, 1952 for export and carryover was

estimated at 747.0 million bushels. The comparable figure for December 1, 1951 was 530.9 million.

Outlook for Exports and Carryover in 1952-1953 According to the latest issue of "The Wheat Situation" released on December 17, exports of wheat and wheat products in terms of wheat from the United States during 1952-53 are expected to total between 300 and 350 million bushels. The publication indicates that this estimate is based on stated requirements against U.S. supplies, known export programs and agreements, and the expected availability of wheat for export from sources other than the United States. Should exports in 1952-53 approximate 325 million bushels, the carryover on July 1, 1953 would be about 560 million bushels. "The Wheat Situation" observes that this level would be above the 1942-1951 average carryover of 335 million bushels and would be sufficient to provide for contingencies.

Acreage and Production of Winter Wheat 1952-1953 The following account of the acreage seeded to winter wheat in the fall of 1952 and a preliminary forecast of production in 1953 is taken from the report on winter wheat and rye released by the Crop Reporting Board on December 19.

"A relatively large acreage of winter wheat has been sown this year under extremely unfavourable conditions. The acreage seeded for all purposes in the fall of 1952 is estimated at 55,361,000 acres, only one per cent below the 55,929,000 seeded in the fall of 1951, nearly the same as that of two years earlier but 10 per cent above the 1941-1950 average. Summer and fall precipitation has been at or near a record low level over practically the entire country. A large acreage was drilled in the "dust" and had to await rains or snows for sufficient moisture to germinate the seed. The first moisture of significance to wheat was not received until late November. As a result, progress of the crop to December 1 was the least satisfactory in many years. Based on the condition of the crop as of December 1, and other factors, a 1953 winter wheat crop of 611 million bushels is indicated. A production this size would be 42 per cent smaller than the record 1952 crop of 1,053 million bushels, 24 per cent below the 1941-1950 average of 800 million bushels, and the smallest since 1943.

This year, prospects for winter wheat are more uncertain than usual. In the last seventeen years, the average change in the United States production estimate from December 1 to harvest has been 113 million bushels. The maximum change was 253 million bushels in 1951 and the minimum change was 6 million bushels in 1936. The principal factors contributing to changes have been weather conditions after December 1.

The general drought condition in late summer and fall prevailed over practically the entire United States. In many States conditions for getting wheat seeded and up to a stand this fall were the most unfavourable of record. With much of the wheat drilled in dry seed beds a large acreage failed to germinate until late November when precipitation was received over much of the United States. Even where earlier germination was possible stands are generally thin and plants poorly rooted.

The prolonged summer drought prevented the usual build-up of soil moisture reserves in the western Great Plains States following the record or near-record 1952 wheat crops. As a result, Kansas and Oklahoma, which produced record crops in 1952, and Texas, show extremely poor prospects for 1953. In Nebraska, wheat condition,



although very spotted, is substantially more favourable than in States farther south. There is a limited acreage of summerfallow wheat in Kansas and Nebraska with fair growth. Most wheat fields show very little "green". However, precipitation in the last month has permitted wheat seeded "in the dust" to germinate, although where snow blew from fields in the western Great Plains, germination is delayed. In Ohio, Indiana, Illinois, and Missouri wheat on a large acreage has either not emerged or is barely visible in the drill rows. This makes the crop unusually vulnerable to low winter temperatures unless a good snow cover is received. Wheat in the Pacific Northwest, and Montana is entering the winter in generally poor condition. Soil was dry at seeding time which resulted in slow germination, spotted and thin stands, and poorly developed plants.

The indicated yield per seeded acre at 11.0 bushels is 7.8 bushels below the record yield of 1952, only 0.6 bushel below the yield of two years ago, and 4.9 bushels below average. The abandonment or seeded acreage that will not be harvested for grain is more difficult than usual to appraise at this time due to the extremely unfavourable seeding conditions this fall. Current conditions point to an abandonment of 26 per cent—nearly equal to the 28.6 per cent of the seeded acreage lost or diverted two years ago. Last year's abandonment amounted to only 10.0 per cent and the average abandonment is 10.1 per cent."

Flour Production In a report released on December 9 the Bureau of the Census, Department of Commerce, estimated wheat flour production in October at 21,081 thousand sacks, 7 per cent higher than the total estimated production in September. However, average daily production in October, which had 2 more working days than the preceding month, amounted to 917 thousand sacks, compared with 939 thousand sacks per working day in September, and 915 thousand sacks per working day produced in October 1951. Wheat flour mills in October operated at 82.7 per cent of capacity, compared with 84.7 per cent in September. Wheat grindings in October were estimated at 49,088 thousand bushels, compared with 45,901 thousand bushels the previous month. Wheat offal output was placed at 424 thousand tons.

1952 Wheat Crop  
Estimated at 1,291  
Million Bushels In a report released December 17 the Crop Reporting Board stated that "production of all wheat in 1952 was the third largest of record, exceeded only by the crops of 1947 and 1948. The estimated 1,291 million bushels compares with 981 million bushels in 1951 and the average of 1,085 million bushels. In several of the major producing States the 1952 crop set new records, reflecting the favourable soil moisture situation at fall seeding time over much of the western Great Plains area, ample spring rainfall over most of the winter wheat areas and nearly ideal harvest conditions throughout the entire country. The winter wheat crop was produced under more favourable weather conditions than was spring wheat. An early spring drought and late season stem rust infestation curtailed spring wheat output in the Dakotas and part of Minnesota. This plus sharply reduced seedings in the Pacific Northwest and dry, hot weather in a few Mountain States resulted in the smallest spring wheat crop since 1940. The yield of all wheat is 18.3 bushels per acre, compared with a 16.0 bushel average for the 1951 crop.

The total acreage seeded to wheat in the fall of 1951 and spring of 1952 was 77,447,000 acres compared with 78,048,000 acres seeded for the 1951 crop. Abandonment and diversion in 1952 amounted to 8.9 per cent or 6.9 million acres compared with 21.2 per cent or 16.6 million acres not harvested for grain in 1951. The total acreage harvested for grain in 1952 was 70,585,000 acres, nearly 15 per cent larger than the 61,492,000 acres harvested in 1951."



Daily Cash Wheat Prices on the Kansas City and Minneapolis Markets

No. 2 Hard Winter, Kansas City			No. 1 Northern Spring, Minneapolis		
Date	Price		Date	Price	
	cents per bushel			cents per bushel	
December 1, 1952 .....	238 1/2 - 248		December 1, 1952 .....	239 1/4	
2 .....	240 1/2 - 248 1/2		2 .....	240	
3 .....	242 1/2 - 249 1/2		3 .....	240 1/2	
4 .....	249 1/2		4 .....	239 3/4	
5 .....	244 - 249 1/2		5 .....	238 5/8	
8 .....	243 - 251		8 .....	240 1/4	
9 .....	243 3/4 - 251		9 .....	240	
10 .....	242 - 253		10 .....	239	
11 .....	243 - 249 1/2		11 .....	238 7/8	
12 .....	241 1/2 - 247 1/2		12 .....	235 5/8	
15 .....	241 1/2 - 247 1/2		15 .....	238 1/4	
16 .....	240 - 240 1/4		16 .....	237 1/4	
17 .....	239 1/2 - 246		17 .....	236 1/2	
18 .....	239 1/2 - 244 1/2		18 .....	237 1/8	
19 .....	240 - 245 1/4		19 .....	237 5/8	
22 .....	239 1/2 - 242 1/2		22 .....	240 1/4	
23 .....	239 3/4 - 245 1/4		23 .....	240 5/8	
24 .....	240 1/2 - 241		24 .....	239 5/8	
25 .....	Christmas Day		25 .....	Christmas Day	
26 .....	238 1/2 - 243 1/4		26 .....	237 7/8	
29 .....	241 3/4 - 242 1/2		29 .....	238 5/8	
30 .....	239 - 243 1/4		30 .....	240	
31 .....	238		31 .....	240 3/8	

Chicago Wheat Futures, High Points of Closing

Date	December	March	May	July	September
	- cents and eighths per bushel -				
December 1, 1952 .....	235/1	242/2	245/5	242/3	244
2 .....	234/3	241/1	244/4	241/4	243/1
3 .....	234	240/4	244/2	241/1	242/7
4 .....	233/4	240/3	243/7	240/7	242/2
5 .....	232/3	239	242/5	240	241/6
8 .....	235/1	241/3	244/7	241/7	243/5
9 .....	235	240/6	244/1	241/4	243/4
10 .....	233/3	239/4	243/2	240/6	242/6
11 .....	231/7	237/6	241/6	240/4	242/1
12 .....	230/6	236/5	240/1	239/4	241/2
15 .....	230/7	237/2	240/6	240/1	242/1
16 .....	230/5	237/1	240/5	239/5	241/6
17 .....	229/4	235/5	239/1	238/3	240/4
18 .....	229/4	235/5	239/2	238/2	240/5
19 .....	229/6	236/4	240/2	239/2	241/7
22 .....		236/6	240/3	239/7	242/2
23 .....		236/6	240/4	240/2	242/6
24 .....		236	239/6	240/1	242/4
25 .....			Christmas Day		
26 .....		233/7	238	238	240/3
29 .....		232/6	236/7	236/7	238/7
30 .....		232/1	236/1	236/1	238/4
31 .....		233/3	237/6	237/3	239/3

## ARGENTINE SITUATION

Supply Position      The table below covers the disposition of the Argentine wheat crop during the past two crop years. Due to the poor crop of last season Argentina became a net importer of wheat during 1951-52 and no old grain was carried over at November 30, the close of the crop year.

Harvesting of the new crop is now completed in many parts of the Argentine, particularly in the north, and unofficial estimates place the probable outturn at some 257 million bushels. Should these estimates be realized the Argentine, after allowing for domestic requirements, may have in excess of 120 million bushels of wheat available for export and carryover in the Southern Hemisphere crop year December 1, 1952—November 30, 1953.

### Argentine Wheat Supplies

Item	1951-52 <u>1/</u>	1950-51
	- million bushels -	
Carryover at beginning 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/</u>	-
Total estimated supplies .....	101.6	220.4
Less estimated domestic requirements for crop year ...	97.8	107.4 <u>4/</u>
Available for export and carryover .....	3.8	113.0
Deduct:		
Exports of wheat as grain, December—November .....	3.8	93.5
Exports of wheat flour in terms of wheat, December—November .....	<u>3/</u>	1.1
Total exports of wheat and wheat flour .....	3.8	94.6
Carryover at end of crop year (November 30) .....	-	18.4

1/ Preliminary. 2/ Imported under barter arrangement in exchange for Argentine corn. 3/ Less than 50,000 bushels. 4/ Revised.

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 November 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 Very favourable weather conditions have held in all areas the past four weeks. There have been good rains in the corn belt so that the condition of that crop at this season is the best it has been in any recent year.

In the wheat belt there has been excellent weather for harvest; operations have been held up occasionally with rain. In the provinces of Córdoba and Santa Fé harvesting of wheat is completed in the northern district and well advanced in the central and southern. In the province of Buenos Aires harvesting has just commenced in the north and will not be under way in the south for another two weeks. There has been local damage from hail and frost in the province of Buenos Aires but in general it is the best yield that Argentina has experienced for many years. Pastures are excellent throughout; in fact, all ranches have more feed than they have cattle.

Wheat The 1952-53 wheat crop is unofficially forecast at about 7 million metric tons (257.2 million bushels) as contrasted with the poor crop of 2 million tons (73.5 million bushels) last year and the recent 5-year average ended 1951-52 of 4,938,000 tons (181.4 million bushels). It is quite possible that with continued favourable weather this figure may be revised upwards.

The large crop this season is due to the extremely favourable weather conditions throughout the season and now the only setback can be a very late frost in the south of the province of Buenos Aires and hail storms. Harvest is completed in the north of the province of Córdoba and Santa Fé; yields vary but the average for the northern belt is about 15 quintals per hectare sown (22 bushels per acre). There are many reports of yields from 20 to 30 quintals per hectare (30 to 45 bushels per acre), a few higher. The grain is good quality, specific weight averaging about 82 or 4 points above standard.

The Ministry of Agriculture in their report for the end of November mentioned the favourable weather conditions and that yields were above normal. At the end of the month they stated that in the province of Córdoba the harvest of wheat was completed in the north and well advanced in the rest of the province. In Santa Fé they estimated that 70 per cent was harvested in the north and about 25 per cent gathered in the central district. In the province of Entre Ríos harvesting of wheat and flax was well under way, yields on the former averaging between 12 and 13 quintals per hectare (18 and 19 bushels per acre). The Department describe the condition of the crop as very good to excellent in the rest of the country.

Flax Harvesting of flax has commenced in the northern grain zone with yields described as normal to above normal. In the northern grain zone, particularly in the province of Entre Ríos, heavy weed growth has made harvest of flax difficult and has impaired yields. However, the trade forecast that the 1952-53 flax crop will reach 650,000 tons (25,589 thousand bushels), up sharply from the poor crop of 302,300 tons (11,901 thousand bushels) last year but still below former years when this country produced upwards of 1 million tons (39,368 thousand bushels).

Oats, Barley and Rye The favourable conditions have also benefited coarse grains and early harvests indicate favourable yields for these crops. It is forecast that production of these three grains will total 2 million tons.



Targets for Grain  
Acreages Under Second  
Five-Year Plan

The section of the Second Five-Year Plan dealing with agriculture establishes the targets to be reached in grain acreages by 1957-58 which represent a 56 per cent increase over current plantings and 14 per cent over the 1935-36 to 1939-40 average. The following table gives the proposed acreages for 1957-58 compared with current plantings and the five-year average ended 1939-40:

Argentine Grain Acreages

Grain	Target 1957-58	1952-53	Five-Year Average 1935-36—1939-40
- thousand acres -			
Wheat .....	19,760	15,487	18,656
Corn .....	17,290	7,410*	15,949
Flax .....	4,940	2,519	7,314
Oats .....	4,693	3,287	3,567
Rye .....	6,916	5,320	2,510
Barley .....	3,458	2,522	1,902

\*Trade estimate.

The target on wheat at 8 million hectares (19,760 thousand acres) represents a 33 per cent increase on the average sowings during the period covered by the first Five-Year Plan for 1947 to 1951. This would be the largest acreage since pre-war but less than the record of 9,219,000 hectares (22,771 thousand acres) sown in 1928-29. The figure for flax is 44 per cent higher than the 1947-1951 period but is substantially less than pre-war sowings. The record is 3,499,157 hectares (8,643 thousand acres) in 1936-37. The goal for corn represents an increase of 146 per cent over the first Five-Year Plan period and compares with the record of 7,630,000 hectares (18,846 thousand acres) sown in 1935-36.

Participation of  
Co-operatives in  
Grain Sales

The Minister of Foreign Trade, Dr. Antonio Cafiero, presided over a conference attended by representatives of the co-operative societies, the National Grain Elevators Board and I.A.P.I., the State trading organization. On this occasion he stressed that the co-operatives were to become increasingly active in the marketing of the crops both at home and abroad under the terms of the Second Five-Year Plan. So far as domestic sales are concerned, the Minister reiterated that the co-operatives are to receive a bonus of one half of one per cent on grain sales to I.A.P.I. and are to be exempt from certain charges levied by the National Grain and Elevators Board. Steps are to be taken in order that the co-operative societies may make sales abroad with the assistance of I.A.P.I. Dealers are only to participate in the marketing of crops as agents for producers who are unable to sell direct to the mills or through the co-operatives, and in such case are limited to a maximum commission of 0.50 pesos per 100 kilos (10 cents per 220 pounds).

Grain Storage  
Rates Reduced

The Minister of Transport on November 19 announced reductions in grain storage rates in railway warehouses. The new rates per cubic meter will be as follows: 1.30 pesos (26 cents) per month, 2.70 pesos (54 cents) per three months, 3.60 pesos (72 cents) per six months and 4.70 pesos (94 cents) per twelve-month period. Rent for open storage space along the railways has been reduced by 50 per cent. Agricultural co-operative societies are

to enjoy a further 30 per cent reduction on these rates.

Grain Shipments Grain shipments during November totalled 39,020 metric tons comprising 27,036 tons of corn (1.064 thousand bushels), 1,508 tons of oats (98 thousand bushels), and 10,476 tons of barley (481 thousand bushels). The United Kingdom, Holland and France were the principal customers for corn, receiving 6,600 tons, (260 thousand bushels), 6,301 tons (248 thousand bushels), and 6,125 tons (241 thousand bushels) respectively, Finland and Belgium following with 4,510 tons (178 thousand bushels) and 2,000 tons (79 thousand bushels). The United Kingdom was the sole customer for barley and Germany received 1,355 tons (53 thousand bushels) of rye, the balance of 153 tons (6 thousand bushels) being destined for Finland.

The following table gives shipments of grain from Argentina during the crop year 1951-52 compared to the previous year:

Argentine Grain Shipments, December 1, 1951—November 30, 1952

Grain	1951-52	1950-51
- thousand bushels -		
Wheat .....	3,783	93,484
Corn* .....	23,730	10,213
Flax .....	1,560	7,521
Oats .....	4,308	6,532
Rye .....	5,128	6,985
Barley .....	5,887	6,378

\*Corn crop year extends from April 1—March 31.

Cumulative grain shipments during the first eleven months of the year at 918,967 tons are 71 per cent less than those effected in the corresponding period of 1951 and 82 per cent less than exports of grain in the same period of 1948. The following table gives Argentine grain shipments by destination for the first eleven months of 1952 together with comparative data for recent years:

Argentine Grain Shipments, January—November, 1952

Destination	Wheat	Corn	Flax	Oats	Rye	Barley
- thousand bushels -						
Austria .....	-	779	-	-	-	-
Belgium .....	-	2,660	71	63	146	-
Brazil .....	1,049	-	-	6	-	-
Chile .....	-	264	49	-	-	-
Denmark .....	-	-	-	-	-	607
Finland .....	-	789	-	352	1,559	-
France .....	-	9,621	647	-	-	-
Germany .....	-	574	67	453	620	3,081
Italy .....	-	24	-	-	-	-
Netherlands .....	-	451	19	534	285	191
Norway .....	-	79	79	-	110	-
Paraguay .....	636	-	-	-	-	-

Argentine Grain Shipments, January—November, 1952 (concluded)

Destination	Wheat	Corn	Flax	Oats	Rye	Barley
- thousand bushels -						
Peru .....	580	394	-	-	-	-
Sweden .....	-	3,387	85	834	1,664	850
Switzerland .....	-	426	-	596	70	78
United Kingdom ...	-	2,280	7	-	-	481
Yugoslavia .....	-	289	-	-	-	-
Totals .....	2,265	22,018	1,025	2,837	4,453	5,287

Same period:

1951 .....	88,532	10,067	6,648	5,402	6,985	6,190
1950 .....	95,644	30,972	4,287	24,116	6,782	4,211
1949 .....	62,691	38,396	-	10,002	6,856	8,630
1948 .....	73,289	89,313	-	4,972	5,437	28,916

URUGUAYAN SITUATION

This brief account relative to the acreage and production of wheat in Uruguay has also been extracted from Mr. McCullough's report of December 15.

First Official Estimate

1952-53 Grain Acreages

According to the first official estimate the area sown to wheat in Uruguay in 1952-53 is 464,303 hectares (1,147 thousand acres) or 20 per cent less than last year's record. This decrease is on account of wet weather at seeding time, and also in view of the fact that the Government did not announce an increase in the official producer price of 16.50 Uruguayan pesos per 100 kilos. Production of wheat in 1951-52 totalled 477,588 metric tons (17,548 thousand bushels) yields being low on account of adverse weather.

Uruguayan Grain Sowings

Grain	1952-53 <u>1/</u>	1951-52	1950-51	1949-50	1948-49	1947-48
- thousand acres -						
Wheat .....	17,060	21,455	18,212	18,978	19,033	18,554
Flax .....	7,624	7,500	6,151	6,283	9,862	8,783
Oats .....	4,303	3,711	4,144	7,178	5,378	4,209
Barley ....	1,210	1,007	1,255	1,500	1,441	960
Rye .....	9	3	8	11	4	14

1/ First official estimate.



## AUSTRALIAN SITUATION

Supply Position      Total Australian wheat supplies for the crop year December 1, 1951 to November 30, 1952 were 180.9 million bushels as against 228.1 million for the previous crop year. Reflecting this situation, total exports of Australian wheat and flour in terms of wheat during 1951-52 amounted to only 81.6 million bushels, 35.9 per cent below the 127.3 million exported in 1950-51. The preliminary estimate places carryover stocks at November 30, 1952 at 15.3 million bushels compared with 19.5 million and 43.9 million respectively at the close of the crop years 1950-51 and 1949-50.

Exports of wheat as grain during 1951-52 were 46.2 million bushels. The principal markets for this wheat, with quantities in millions of bushels, were the United Kingdom (18.2), New Zealand (8.6), India (6.4), Holland (2.9), Eire (2.0), Italy (1.9), Cyprus (1.6), Rhodesia (1.5), and Japan (1.2). Exports of wheat flour in terms of wheat during 1951-52 amounted to 35.4 million bushels. Among the major outlets for these exports, with quantities in millions of bushels were Ceylon (9.1), Malaya (5.7), the United Kingdom (4.7), Indonesia (3.8), India (3.0), Sudan (1.4), Mauritius (1.1), and Egypt (1.0).

### Australian Wheat Supplies

Item	1951-52 <u>1/</u>	1950-51 <u>2/</u>
	- million bushels -	
Carryover, including flour as wheat, at beginning of crop year (December 1) .....	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	81.3 <u>3/</u>
Available for export and carryover .....	96.9	146.8
Deduct:		
Exports of wheat as grain, December 1 to November 30 .....	46.2	85.2
Exports of wheat flour in terms of wheat, December 1 to November 30 .....	35.4	42.1
Total exports of wheat and wheat flour .....	81.6	127.3
Carryover at end of crop year (November 30) .....	15.3	19.5

1/ Preliminary. 2/ Subject to revision. 3/ Calculated residual, i.e., total supplies less exports and carryover.

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

"Australian wheat stocks at November 30th excluding new season's wheat totalled 16,597,000 bushels. Wheat exports from December 1st 1951 to November 30th totalled 46,192,000 bushels, with shipments during preceding four weeks mainly to the United Kingdom. Flour exports for the same period were 682,787 long tons, with

13,421 to Malaya, 9,240 to Ceylon, 6,779 to Indonesia and 2,125 to the United Kingdom. Latest official estimate of wheat harvest 163 million bushels."

First Advance on According to the Australian 'Wheat Board Gazette' the follow-  
1952-53 Wheat Crop ing announcement was made on October 29, 1952 by the Minister for Commerce and Agriculture in the House of Representatives:

"I wish to announce the amount of the first advance per bushel on the wheat of the impending harvest, which will constitute No. 16 Pool.

The first advance to growers will be 12/- a bushel less freight for bulk wheat and 12/9 less freight for bagged wheat.

The advance will be made in the usual way by the Australian Wheat Board on delivery by growers of their wheat into the Pool and it is estimated that the advance to growers will be £85 million less freight.

This first advance on wheat from the 1952-53 crop is at the highest rate ever paid on any wheat pool in Australia, and conforms with the announcement of policy made by the Prime Minister on March 28, 1952.

At that time the Prime Minister promised a first advance of 12/- a bushel bulk basis f.o.r. ports or alternatively 85 per cent of the estimated pool return, whichever was desired.

The Australian Wheat Board recommended payment on the 12/- bulk, 12/9 bagged basis. This recommendation was adopted by the Government which has arranged for the necessary accommodation with the Commonwealth Bank.

The first of the 1952-53 season's wheat will be harvested in Queensland at the beginning of November and harvesting will be in full swing by Christmas, by which time the Wheat Board will have paid out substantial amounts against deliveries by growers.

The advance indicates the intention of the Government that the wheat growers shall, on delivery of their wheat, receive immediately as near to its total value as is consistent with ordinary financial prudence.

Until last year the first advance on wheat had always been made upon a most conservative basis. Last year, for the first time, the Government arranged that a first and immediately following supplementary advance should, between them, reimburse growers up to the cost of production of their wheat.

This year, as an encouragement and assistance to wheat growers, a step further has been taken in making a maximum advance which could prudently be made against the estimated final average realisations from home and export sales."

Continued available. However, for the information of interested parties,  
from page 4 regular publication of the adjusted monthly figures will be continued in the table entitled 'Exports of Canadian Wheat and Wheat flour, 1952-53 by Destination'. Thus, in the current (December) issue the usual column will appear showing the adjusted data by destination for the latest month available, in this case August, 1952.



CALENDAR OF WHEAT EVENTS, DECEMBER, 1952

- 9 - The Canadian Wheat Board announced that a delivery quota of 15 bushels per seeded acre on wheat, oats, barley and rye was effective at all stations in Manitoba. Alternate delivery privileges on these four grains were also permitted. This provision permits producers in Manitoba to deliver grain to any delivery point in the province, provided space is available, without further authorization.
- 12 - The S. S. Indian City, the first of a fleet taking 13 million bushels of Canadian wheat to India, began loading at Vancouver. Some 45 vessels will be required to handle the movement of the wheat involved in the transaction, valued at \$25,000,000.
- 16 - Canada's delegation to the International Wheat Agreement renewal talks, to begin in Washington on January 30, will be headed by Mitchell W. Sharpe, Associate Deputy Minister of the Department of Trade and Commerce. Alternate delegates are W. C. McNamara, Assistant Chief Commissioner of the Canadian Wheat Board, and Dr. C. F. Wilson, Agricultural Counsellor, Canadian Embassy, Rome. In addition, five advisers to the delegation have been named from among producer organizations in the three Prairie Provinces.
- 17 - The gross value of production of Canada's 1951 wheat crop, based on prices received by farmers during the 1951-52 crop year, was estimated at \$855 million or about 40 per cent of the total of \$2,124 million for the eighteen major field crops covered in the estimate. The farm value of the 1951 wheat crop in the three Prairie Provinces was estimated as follows: Manitoba, \$83.7 million; Saskatchewan, \$494.0 million; and Alberta, \$229.5 million. These estimates do not represent cash income received by farmers from the sale of wheat but are determined by applying the average prices received by farmers for that part of the crop actually sold to the total production.
- 18 - The 1952 lake navigation season closed at the Lakehead with the sailing of the S. S. Mohawk Deer. During the 1952 navigation season some 450.8 million bushels of wheat, oats, barley, rye and flaxseed were shipped from terminals at Fort William-Port Arthur. Wheat shipments, at 246.1 million bushels, were the highest since 1945 when the total reached 344.4 million.
- 19 - The acreage seeded to winter wheat for all purposes in the United States in the fall of 1952 was estimated at 55.4 million acres, one per cent below the 55.9 million seeded in the fall of 1951 but 10 per cent above the 1941-1950 average. Much of the 1952 seeding was done under extremely unfavourable conditions with the result that prospects are more uncertain than usual. Based on conditions at December 1, and other factors, a 1953 winter wheat crop of 611 million bushels is indicated. A crop of this size would be 42 per cent smaller than the record 1952 crop of 1,053 million bushels, 24 per cent below the 1941-1950 average of 800 million bushels, and the smallest since 1943.











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