

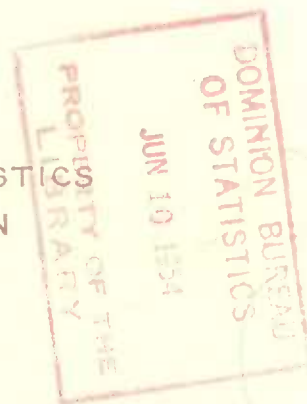
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THE WHEAT REVIEW



MAY, 1954

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Department of Trade and Commerce

THE WHEAT REVIEW

MAY, 1954

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Minister of Trade and Commerce

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WORLD WHEAT SITUATION

Current Supplies Latest available estimates indicate that supplies of wheat remaining on or about May 1, 1954 in the four major exporting countries for export and for carryover at the end of their respective crop years amounted to 1,797.3 million bushels, some 34 per cent greater than the 1,337.6 million available a year ago. Supplies on or about May 1, 1954 (in millions of bushels) were held as follows, with last year's figures in brackets: United States, 903.2 (592.5); Canada, 637.0 (505.1); Australia, 136.0 (95.8); and Argentina, 121.1 (144.2). Estimates for both years include on-farm stocks as well as those in commercial positions.

Exports Total exports of wheat and wheat flour from the four major exporting countries for the first three quarters (August—April) of the current Canadian crop year, at 461 million bushels, are down almost 22 per cent from last season's shipments of 589 million for the same period. Shipments from each of the four countries during the August—April period of the current and preceding crop years are shown in the table below.

Exports of Wheat and Flour in Terms of Wheat, August—April Period

Aug.-Apr. Period	United States	Canada	Argentina	Australia	Total
	- millions of bushels -				
1952-53	260.9	249.6	10.6	68.0	589.2
1953-54	145.1	186.2	86.6	43.5	461.4

It will be observed that while Canadian exports have declined about 25 per cent from the level for the same period a year ago, exports from the United States and Australia have dropped by some 44 per cent and 36 per cent, respectively. Reduced shipments from these three countries have been partially offset by the sharp increase (717 per cent) in Argentine exports from the extremely low level of shipments from that country in August—April 1952-53.

Canada's share of the total exports from the four countries has remained relatively constant between the two periods, shipments during the first nine months of the 1952-53 crop year having accounted for 42.4 per cent of the total and for the same period in 1953-54, 40.4 per cent. The United States share of the total dropped from 44.3 per cent to 31.4 per cent between the same two periods, while Australia's share dropped from 11.5 per cent to 9.4 per cent. Following a near crop failure in 1951-52 the Argentine harvested much improved crops in 1952-53 and 1953-54. Reflecting its improved supply position, Argentina's share of the four countries' exports during August—April, 1953-54 amounted to 18.8 per cent as against 1.8 per cent in the comparable period of 1952-53.

The four countries considered above account for the bulk of the world's wheat exports. However, preliminary and incomplete data indicate that total exports during the current season from countries other than the four principal exporters are running ahead of a year ago.

International Wheat Agreement Sales and Purchases for Crop Year 1953-54

Importing Countries	Guaranteed Quantities	Source				Total Purchases	Remainder 3/
		Canada 1/	Australia 2/	France 2/	U.S.A. 2/		
- thousand bushels -							
Austria	9,186	-	-	-	-	-	9,186
Belgium	23,883	10,650	-	-	1,283	11,933	11,950
Bolivia	4,042	695	-	-	562	1,257	2,785
Brazil	13,228	3,733	-	-	-	3,733	9,495
Ceylon 4/	10,288	763	9,525	-	-	10,288	-
Costa Rica	1,286	549	-	-	655	1,204	82
Cuba	7,422	1,518	-	-	3,606	5,124	2,298
Denmark	1,837	-	-	-	-	-	1,837
Dominican Republic ...	955	333	-	-	376	709	246
Ecuador	2,388	1,707	-	-	491	2,198	190
Egypt	14,697	-	-	-	1,888	1,888	12,809
El Salvador	735	215	-	-	488	703	32
Germany	55,116	15,348	1,889	-	15,403	32,640	22,476
Greece	12,860	-	-	-	4,076	4,076	8,784
Guatemala	1,286	183	-	-	752	935	351
Haiti	1,837	515	-	-	890	1,405	432
Honduras Republic	735	80	-	-	407	487	248
Iceland	404	184	-	-	101	285	119
India	36,744	-	345	-	-	345	36,399
Indonesia	6,246	5	3,250	-	594	3,849	2,397
Ireland	10,105	1,607	951	-	-	2,558	7,547
Israel	8,267	2,967	-	-	-	2,967	5,300
Japan	36,744	11,690	-	-	24,903	36,593	151
Jordan	2,940	-	-	-	-	-	2,940
Korea	1,470	-	-	-	493	493	977
Lebanon	2,756	-	-	-	34	34	2,722
Liberia	73	26	-	-	12	38	35
Mexico	14,697	-	-	-	2,946	2,946	11,751
Netherlands	24,802	4,972	319	-	10,267	15,558	9,244
New Zealand	5,879	-	4,851	-	-	4,851	1,028
Nicaragua	367	131	-	-	221	352	15
Norway	8,451	2,343	-	-	2,946	5,289	3,162
Panama	735	330	-	-	284	614	121
Peru	7,349	110	-	-	577	687	6,662
Philippines	8,672	4,071	15	-	2,933	7,019	1,653
Portugal	7,349	743	421	-	2,360	3,524	3,825
Saudi Arabia	2,572	-	-	-	1,519	1,519	1,053
Spain 4/	9,186	-	-	-	9,316	9,316	-
Switzerland	7,900	6,930	-	-	-	6,930	970
Union of S. Africa ...	13,228	5,600	-	-	2,053	7,653	5,575
Vatican City 4/	551	-	-	-	551	551	-
Venezuela	6,247	3,439	-	-	2,245	5,684	563
Yugoslavia	3,674	-	-	-	2,338	2,338	1,336
Totals		81,437	21,566	-	97,570	200,573	
Guaranteed Quantities (Exporting Countries)		163,231	48,000	367	209,558	421,156	
Balance		81,794	26,434	367	111,988	220,583	

1/ Canadian sales through May 18, 1954.

2/ Sales recorded by International Wheat Council through May 14, 1954.

3/ The quantities are the unfulfilled balances of the total guaranteed quantities for the year.

4/ Quota filled.

CANADIAN SITUATION

Quota Position In reply to a question asked in the House of Commons on May 24, the Right Hon. C. D. Howe, Minister of Trade and Commerce stated, "...it is possible at this time to speed up deliveries from the country. I am told that the outstanding orders for the forwarding of grain will take care of all points that have not as yet reached the five-bushel quota. Over and above the five-bushel quota, considerable progress is being made in bringing all points up to the seven-bushel quota. We believe that situation can be achieved in due course.

The difficulty is that we have a great preponderance of No. 2 northern wheat and there is a limit to the extent that we can block up our facilities in the east by filling them with No. 2 northern wheat. However, we now have a sufficient movement of No. 2 northern wheat to enable us to clean up the five-bushel quota points. I point out to hon. members that the specified acreage is about 70 million acres. On a seven-bushel quota that in itself will amount to a delivery of about 500 million bushels. The special quotas deliverable to coarse grains and for other purposes will raise that amount by at least another 50 million bushels. Hence after we reach the seven-bushel quota we shall be working on total deliveries of over 550 million bushels whereas the average deliveries over the past ten years have been about 510 million bushels."

New Lake Shipping Rates Set Shipping charges on lake grain movement from the Lakehead to Montreal and Georgian Bay ports have been established for the current season. Shipping cost of all grains between the Lakehead and Montreal is reduced 1 1/2 cents a bushel while the shipping charge on all grains from the Lakehead to Georgian Bay ports is lower by 1 cent a bushel. The rate on wheat from the Lakehead to Montreal is 14 1/2 cents per bushel, compared with last year's 16 cent rate. Charges on wheat from the Lakehead to Georgian Bay ports are 4 1/2 cents compared with the 5 1/2 cents charged a year ago.

Rust Outlook The following report on rust development was released on May 28 by the Dominion Plant Pathology Laboratory at Winnipeg.

"Reports from the rust-overwintering area in Southern Texas have indicated a greater amount of overwintering of wheat stem rust this year than a year ago. A certain amount of stem rust has been present in the southeastern part of the State since about February 21st. Farther north, at College Station in Central Eastern Texas, spores were present in the air on February 21st, and a few rust pustules were observed about the middle of March. This rust development occurred earlier than last year, when stem rust was not found until the beginning of April. Leaf rust infection also developed more rapidly than a year ago, with the result that this rust was general throughout Texas by the end of March. All this rust development was severely checked by drought in April and no further rust spread of any consequence took place until after the drought was to some extent relieved by rains late in the month. By the middle of May slight amounts of stem rust were present in Southern Oklahoma, and a mere trace of it had been found in southernmost Kansas. A search in Nebraska did not reveal any stem rust around May 20th but a few pustules of leaf rust could be found.

"The general impression is that there is no more stem rust in the Southern States, and probably less, than at this time last year. On account of the severe drought in April the amount of rust inoculum at the moment is not great. Subsequent rains, however, have revived the grain in the winter wheat belt, which will provide a path for the northward spread of the rust.

"In order to detect spore movement, spore traps were set up at Winnipeg, Morden and Brandon, Manitoba, and at Regina, Saskatchewan on May 15th. Slides exposed at these places for the period May 15th to 20th have been examined. No spores of either stem rust or leaf rust were found on the slides exposed at Winnipeg, Brandon and Regina. A single stem rust spore was found on a slide exposed at Morden from May 15th to 17th. This may have been brought up from the south by strong southerly winds that prevailed May 13th and 14th.

"Indications, at present, are that we shall have another late crop. Temperatures, generally, have been below normal and plant growth has been slow. In the Winnipeg area trees and shrubs have come into flower 10 to 14 days later than the average date.

"At present it is not possible to make any prediction as to the amount of rust that may develop on wheat in the Prairie Provinces this summer. The late sowing of most of the wheat crop will minimize chances that the crop will escape rust through early ripening, but it does not make a rust epidemic certain, because the development of a rust epidemic depends on so many factors, including the amount of spores that drift up from the south and the temperature and moisture conditions during the growth of our crop."

Supply Position: Total estimated supplies of wheat in Canada for 1953-54 amount to 983.2 million bushels consisting of a carryover of 369.2 million and the 1953 crop of 614.0 million. In 1952-53 total estimated supplies were 905.1 million bushels. After deducting anticipated domestic requirements of 160.0 million bushels, some 823.2 million were available for export and for carryover during the 1953-54 crop year.

Total exports of both wheat as grain and wheat flour in terms of wheat equivalent during the August—April period of the current crop year amounted to 186.2 million bushels as against exports of 249.6 million for the same period of the preceding crop year. The balance available at May 1 for export and for carryover during 1953-54, at 637.0 million bushels exceeded by some 26 per cent the total of 505.1 million at May 1, 1953.

Weekly marketings of wheat by farmers in the Prairie Provinces during the five-week period ending May 19, ranged from a low of 2.5 million bushels for the week ending April 21 to a high of 4.9 million for the week ending May 12. During the period April 14 to May 19 of the current crop year, the visible supply of Canadian wheat declined by some 10.0 million bushels, while in the comparable period of 1952-53 the visible wheat supply was reduced by some 6.4 million. Stocks in country elevators at May 19 amounted to 191.5 million bushels, or 56 per cent of the total visible supplies as against country elevator stocks of 130.0 million (49 per cent) and 103.6 million (48 per cent) in 1953 and 1952, respectively. Stocks of 11.2 million bushels were held in store at Vancouver-New Westminster at May 19, 1954 compared with stocks of 7.0 million bushels in 1953 and 9.4 million in 1952.

Canadian Wheat Supplies

Item	1952-53	1953-54 ^{1/}
- million bushels -		
Carryover in North America at beginning of crop year (August 1)	217.2	369.2
New crop	687.9	614.0
Imports of wheat, August—March	<u>2/</u>	<u>2/</u>
Total estimated supplies	905.1	983.2
Less estimated domestic requirements for crop year	150.4	160.0
Available for export and for carryover	754.7	823.2
Deduct:		
Overseas clearances of wheat as grain, August—April ...	188.4	147.0
Exports of Canadian wheat to U.S., August—April	19.7	5.0
Total exports of wheat	208.1	152.1
Exports of wheat flour in terms of wheat, August—April ..	41.5 ^{3/}	34.1
Total exports of wheat and wheat flour	249.6	186.2
Balance on May 1 for export and for carryover	505.1	637.0

^{1/} Preliminary. ^{2/} Less than 50,000 bushels.

^{3/} Adjusted for time lag in returns made by Customs.

With the lake shipping season opening twenty days later this year than last, and with shipments running considerably below the extremely high level of a year ago, stocks at May 19 in Fort William—Port Arthur at 55.8 million bushels are more than twice those of the 26.5 million in 1953 and 24.4 million in 1952. In Bay, Lake and Upper St. Lawrence ports, wheat stocks at May 19 of the current crop year amounted to 26.7 million bushels, well below the 32.5 million in the same position at approximately the same date in 1953 but substantially greater than supplies of 21.8 million bushels in 1952. Stocks of 19.6 million bushels in Lower St. Lawrence and Maritime ports exceeded by a considerable margin the comparable stocks of 14.5 million a year ago and 11.8 million two years ago. Total wheat stocks in all commercial positions at May 19, 1954 amounted to 341.6 million bushels as against stocks of 264.0 million and 217.6 million in 1953 and 1952, respectively.

Total exports of wheat as grain and wheat flour in terms of wheat equivalent during April, 1954 amounted to 15.3 million bushels, below both the previous month's shipments of 18.9 million bushels, and those of April, 1953 when exports totalled 24.9 million. Exports of wheat as grain during April of the current crop year totalled 11.5 million bushels, some 19 per cent below the 14.2 million shipped during the preceding month. Total exports of wheat as grain during the first three-quarters of the 1953-54 crop year amounted to 152.1 million bushels as against 208.1 million for the same period of 1952-53.

(continued on Page 8)

Farmers' Marketings of Wheat in the Prairie Provinces, 1953-54

Week ending		Manitoba	Saskatchewan	Alberta	Total	Last Year
- bushels -						
August	6, 1953	137,958	939,846	744,269	1,822,073	2,939,427
	13	82,359	4,495,064	2,153,632	6,731,055	1,148,732
	20	640,737	6,490,324	2,129,349	9,260,410	3,265,571
	27	3,048,079	4,727,218	942,142	8,717,439	14,893,230
September	3	2,627,036	4,252,468	1,061,372	7,940,876	14,263,191
	10	1,035,827	3,688,233	1,449,063	6,173,123	14,273,008
	17	845,786	6,161,789	2,446,556	9,454,131	12,496,130
	24	1,055,854	8,743,712	3,935,369	13,734,935	14,104,065
	30	1,149,984	7,782,544	3,568,464	12,500,992	25,013,654
October	7	1,299,454	8,630,744	4,756,932	14,687,130	19,656,526
	14	853,501	6,932,138	4,630,282	12,415,921	13,329,824
	21	765,769	5,808,367	3,267,906	9,842,042	11,759,199
	28	812,735	4,992,187	2,361,514	8,166,436	8,631,950
November	4	836,330	4,377,068	2,296,868	7,510,266	11,675,236
	11	826,645	4,844,511	2,904,327	8,575,483	12,445,961
	18	955,562	6,521,873	2,744,250	10,221,685	12,310,246
	25	701,283	6,785,799	2,132,679	9,619,761	12,444,752
December	2	580,429	6,454,635	2,314,873	9,349,937	9,940,496
	9	482,876	5,846,150	1,636,500	7,965,526	11,000,530
	16	1,980,889	6,824,131	3,313,827	12,118,847	10,993,712
	23	2,531,916	16,102,080	6,888,148	25,522,144	5,788,433
	30	1,038,834	7,734,987	3,556,955	12,330,776	8,172,762
January	6, 1954	379,564	3,075,407	1,536,246	4,991,217	9,524,672
	13	243,394	2,671,407	2,824,975	5,739,776	7,167,790
	20	151,702	1,925,780	1,759,013	3,836,495	8,669,485
	27	41,894	494,946	482,125	1,018,965	10,512,807
February	3	36,511	609,783	749,543	1,445,837	6,842,855
	10	193,500	2,413,218	2,079,190	4,685,908	8,416,097
	17	104,839	1,876,285	1,808,007	3,789,131	6,205,872
	24	110,274	1,596,550	1,323,967	3,030,791	5,159,110
March	3	124,972	1,398,223	1,640,538	3,163,733	4,324,128
	10	65,984	915,951	1,266,236	2,248,171	9,612,414
	17	105,847	1,223,254	1,260,507	2,589,608	9,303,390
	24	164,969	1,152,269	990,670	2,307,908	5,392,904
	31	196,322	1,274,338	1,402,072	2,872,732	2,690,094
April	7	154,978	1,370,386	978,974	2,504,338	2,849,847
	14	213,172	2,066,101	1,407,898	3,687,171	5,671,584
	21	139,539	1,462,649	910,300	2,512,488	7,982,562
	28	119,843	2,337,070	975,037	3,431,950	6,663,832
May	5	83,502	2,462,753	1,298,040	3,844,295	8,224,961
	12	162,156	2,758,296	1,967,087	4,887,539	12,551,968
	19	146,153	2,503,663	1,686,678	4,336,494	6,708,773
Totals	27,278,958	174,724,197	89,582,380	291,585,535	395,021,780

Visible Supply of Canadian Wheat, May 19, 1954, Compared with
Approximately the same Date, 1952 and 1953

Position	1952	1953	1954
- thousand bushels -			
Country elevators - Manitoba	5,770	6,851	23,876
Saskatchewan	60,346	73,262	115,770
Alberta	37,438	49,856	51,888
Totals	103,554	129,970	191,534
Interior private and mill	5,134	5,798	7,121
Interior terminals	7,613	15,379	15,161
Vancouver-New Westminster	9,387	7,006	11,210
Victoria	-	63	774
Prince Rupert	67	154	53
Churchill	2,154	2,094	2,516
Fort William-Port Arthur	24,442	26,509	55,777
In transit rail (Western Division)	13,730	19,865	7,309
Bay, Lake and Upper St. Lawrence ports	21,812	32,481	26,743
Lower St. Lawrence and Maritime ports	11,762	14,543	19,577
In transit lake	4,891	5,805	1,284
In transit rail (Eastern Division)	2,919	3,556	968
United States ports	10,145	782	1,578
Totals	217,610	264,003	341,604

Grading of Wheat Inspected, August—April, 1953-54 with Comparisons

Grade	Crop Year		August—April			
	Average 1947-48— 1951-52	1952-53	1952-53		1953-54	
	per cent	per cent	cars	per cent	cars	per cent
1 Hard	1/	1/	49	1/	-	-
1 Northern	12.2	7.1	13,688	7.2	12,171	8.6
2 Northern	29.9	31.7	53,063	28.0	59,580	41.9
3 Northern	13.7	17.4	33,052	17.5	29,605	20.8
4 Northern	6.0	9.6	19,685	10.4	8,180	5.8
5 Wheat	5.7	10.4	20,750	11.0	8,147	5.7
6 Wheat	3.3	2.8	6,587	3.5	3,392	2.4
Feed Wheat	0.6	0.4	1,038	0.5	266	0.2
Garnet	0.9	0.5	909	0.5	701	0.5
Amber Durum	3.2	1.7	3,900	2.1	3,842	2.7
Alberta Winter	0.5	0.1	232	0.1	160	0.1
Toughs 2/ 3/	18.4	16.7	33,167	17.5	13,756	9.7
Damps 2/ 4/	3.8	0.1	322	0.2	77	0.1
Rejected 2/	0.6	1.0	1,895	1.0	1,594	1.1
All Others	1.1	0.4	837	0.4	738	0.5
Totals	100.0	100.0	189,174	100.0	142,209	100.0

1/ Less than .05 per cent.

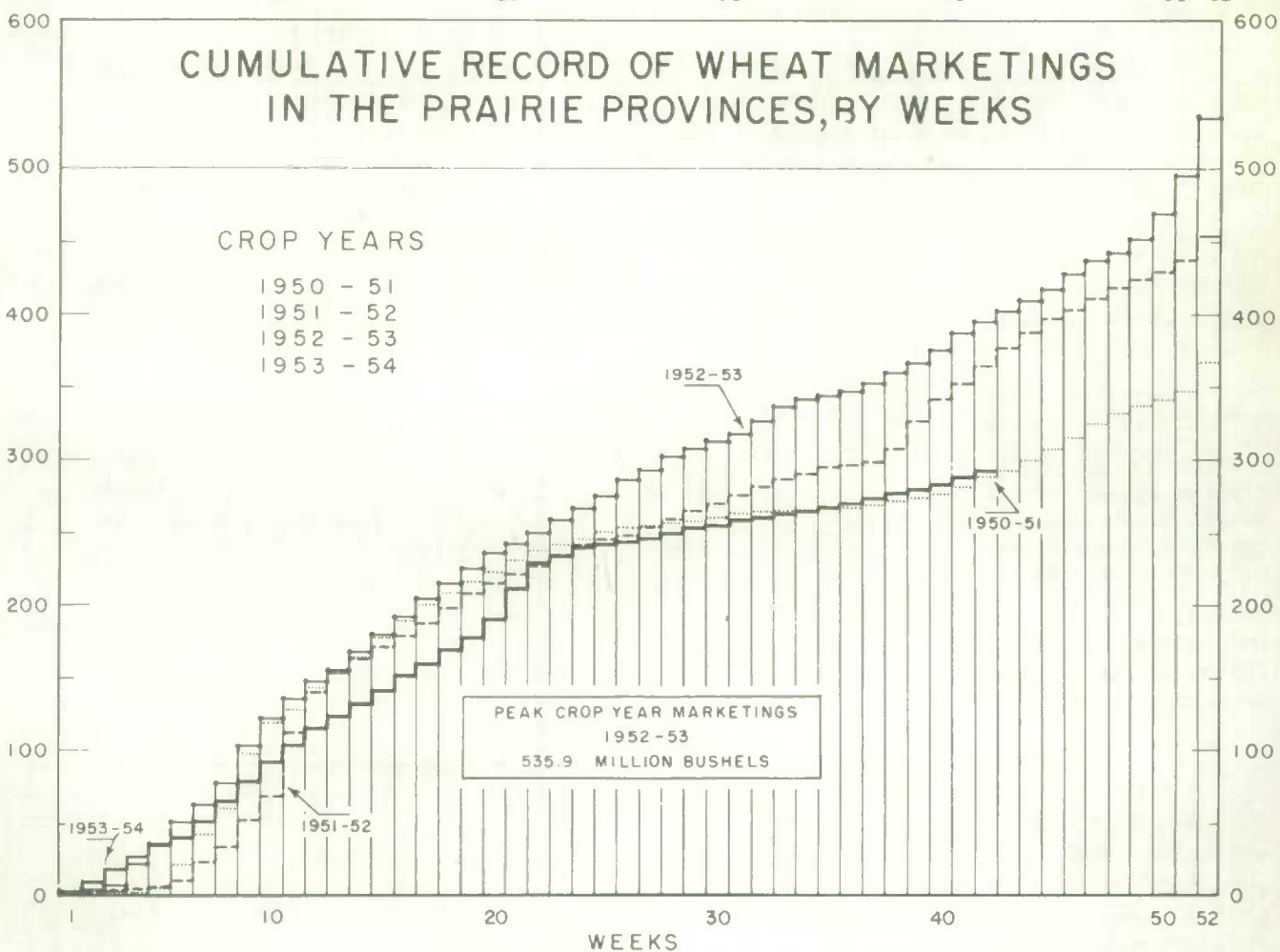
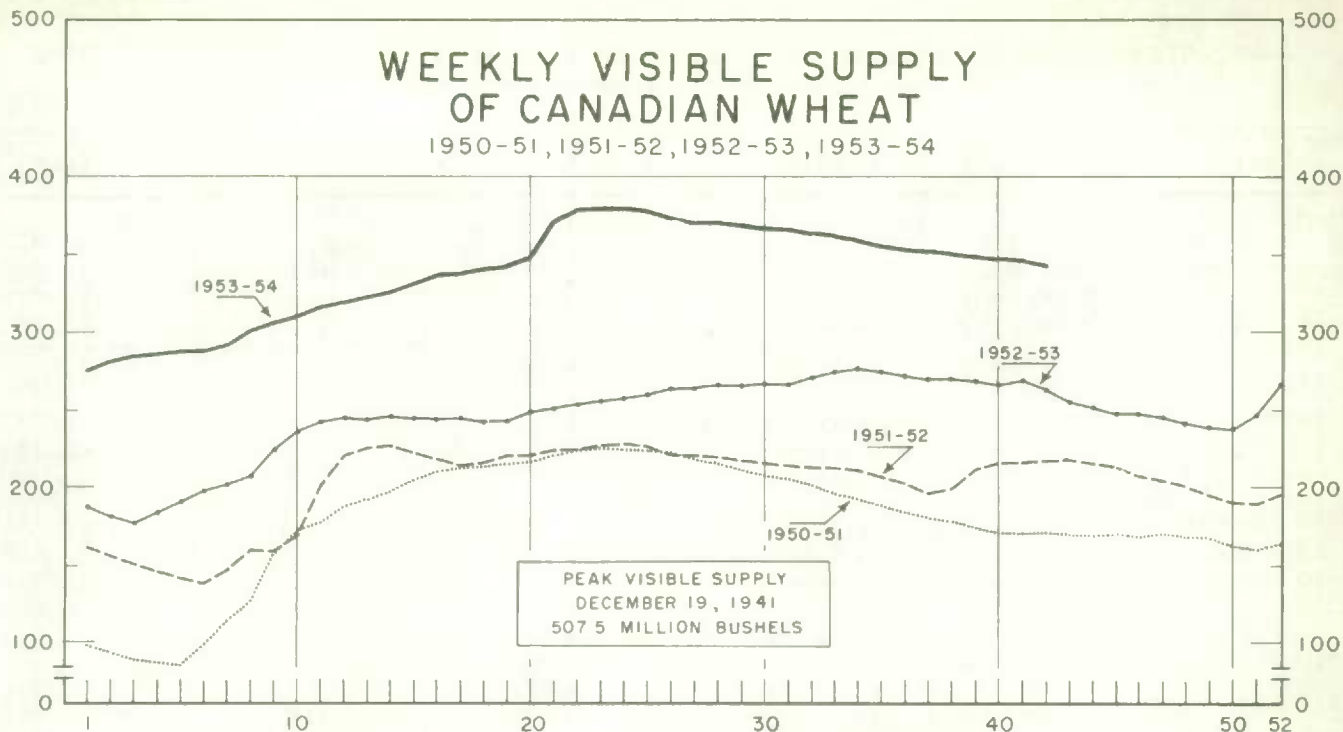
2/ All varieties and grades.

3/ Moisture content 14.9 to 17 per cent for Durum, 14.6 to 17 per cent for all other varieties.

4/ Moisture content over 17 per cent.

MILLION BUSHEL

MILLION BUSHEL



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

Lake Shipments of Canadian Grain from the Opening of Navigation to May 17, 1954
and to Approximately the Same Date, 1944 to 1953*

Year	Wheat	Oats	Barley	Rye	Flaxseed	Total
- thousand bushels -						
1944	57,580	15,187	9,659	2,815	3,053	88,293
1945	52,987	20,079	10,939	1,603	1,017	86,624
1946	24,167	15,411	6,590	518	219	46,905
1947	18,840	7,787	3,627	841	-	31,094
1948	22,407	3,716	3,656	231	1,176	31,187
1949	48,361	4,351	4,888	3,540	2,993	64,133
1950	21,847	2,155	4,024	662	69	28,757
1951	32,253	10,147	6,068	1,362	136	49,966
1952	50,532	12,876	13,986	1,882	1,392	80,668
1953	59,955	15,907	23,224	2,702	1,109	102,896
1954	4,988	12,771	11,196	1,223	1,123	31,301

*Shipments from opening of navigation to May 14, 1944 through 1947. Shipments for subsequent years to the following dates: May 20, 1948; May 19, 1949; May 18, 1950; May 17, 1951; May 15, 1952; and May 17, 1953.

Total shipments of the five major grains from Lakehead terminals from the opening of navigation to May 17 of the current crop year amounted to 31.3 million bushels well below the comparable 1953 total of 102.9 million. However, it must be noted that navigation opened some 20 days later this year than last, and that lake shipments of these grains were proceeding at an extremely high rate in 1953. Shipments of oats at 12.8 million bushels and barley at 11.2 million accounted for 41 per cent and 36 per cent of the total, respectively. Of the remainder, wheat accounted for 16 per cent, rye 4 per cent and flaxseed 4 per cent. Flaxseed was the only one of the five grains moving in greater volume this year than last.

Continued from Page 5

The United Kingdom continued as the principal market for Canadian wheat, taking some 47.9 million bushels or 31 per cent of the total export movement of wheat as grain during the August-April period of 1953-54. Other major markets for Canadian wheat during the period, with quantities in millions of bushels, were as follows: Japan, 28.9; Federal Republic of Germany, 11.7; Belgium, 10.5; Switzerland, 8.5; The Netherlands, 5.6; South Africa, 5.2; United States, 5.0 (of which 1.4 was for milling in bond); India, 4.3; Brazil, 3.9; Spain, 3.4; Israel, 3.0; Norway, 2.1; Ireland, 1.8; Peru, 1.5; Malta, 1.5; Cuba, 1.1, and Ecuador, 1.0.

Preliminary Customs returns indicate that the equivalent of an additional 3.8 million bushels of wheat was exported in the form of wheat flour during April, 1954, compared with exports of 4.6 million bushels of wheat equivalent during March. The adjusted April, 1953 total stands at 4.5 million bushels. Total exports of flour in terms of wheat for the August-April period of the current crop year amounted to 34.1 million bushels as against the adjusted figure of 41.5 million bushels for the corresponding period of the preceding crop year.

Wheat Shipments* to the United States by Destination
August 1, 1953 to May 19, 1954
Compared with Approximately the Same Period 1951-52 and 1952-53

Destination	1951-52	1952-53	1953-54
- bushels -			
<u>By Vessel</u>			
Duluth-Superior	4,361,258	2,643,223	73,026
Milwaukee	353,016	-	40,940
Chicago	1,161,571	383,222	68,700
Huron	-	320,734	68,592
Erie	93,107	276,567	153,776
Buffalo	18,178,752	12,881,591	5,169,931
Oswego	514,005	1,642,791	-
Totals, Vessel	24,661,709	18,148,128	5,574,965
<u>By Rail</u>			
U.S.A. Seaboard Ports	1,903,416	648,480	16,534
Other U.S.A. Points	5,058,398	4,181,271	1,711,419
Totals, Rail	6,961,814	4,829,751	1,727,953
Totals, Shipments	31,623,523	22,977,879	7,302,918

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

Total shipments of wheat to the United States, either for re-export or retention for domestic use from the beginning of the current crop year to May 19, amounted to 7.3 million bushels, most of which (some 5.2 million bushels) was shipped to Buffalo. Shipments for the comparable periods of 1952-53 and 1951-52 amounted to 23.0 million and 31.6 million bushels, respectively.

Rail shipments of wheat to Maritime ports from Bay, Lake and Upper St. Lawrence ports during the first three quarters of the current crop year amounted to 9.7 million bushels compared with 13.6 million shipped during the same period of 1952-53.

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

Ports	August 1, 1952 to April 30, 1953	August 1, 1953 to April 30, 1954
- bushels -		
Port McNicoll	4,488,865	3,469,474
Midland	6,017,010	3,872,981
Collingwood	640,883	797,448
Owen Sound	1,091,355	916,431
Goderich	99,760	240,278
Sarnia	630,857	286,263
Walkerville	-	145,082
Humberstone	30,000	-
Toronto	567,557	-
Prescott	32,298	-
Totals	13,598,585	9,727,957

Rail Shipments of Wheat from Fort William-Port Arthur, 1950-51-1953-54

Month	1950-51	1951-52	1952-53	1953-54
- bushels -				
August	122,532	283,914	191,711	191,336
September	123,256	435,068	1,181,046	236,030
October	73,543	159,667	936,757	173,043
November	133,848	465,193	651,957	138,440
December	1,517,624	1,387,828	464,914	347,824
January	4,394,047	5,839,567	6,550,958	510,486
February	3,303,248	3,618,007	9,566,151	368,662
March	3,476,161	1,564,586	6,285,944	555,518
April	1,196,236	107,061	189,339	378,681
May	462,676	132,496	216,046	
June	356,443	196,083	136,014	
July	199,603	113,827	223,687	
Totals	15,359,217	14,303,297	26,594,524	

With lake navigation not officially open until April 20, rail shipments of wheat from the Lakehead during April amounted to 378,681 bushels, somewhat below the 555,518 bushels shipped during March 1954, but well above the comparable shipments of 189,339 bushels and 107,061 bushels shipped in April 1953 and 1952, respectively. Cumulative rail shipments from the Lakehead during the August-April period of the current crop year amounted to 2.9 million bushels as against the shipments of 26.0 million during the same period of the preceding crop year.

Distribution of the April 1954 rail shipments of wheat from the Lakehead by grade and destination is shown in the table below. The bulk of the shipments, 236,652 bushels, went to destinations in Ontario, while Quebec accounted for an additional 94,968 bushels. Relatively smaller shipments went to destinations in New Brunswick, Manitoba, Nova Scotia and Prince Edward Island.

Distribution of Rail Shipments of Wheat from Fort William-Port Arthur
April, 1954

Grade	P.E.I.	N.S.	N.B.	Que.	Ont.	Man.
- bushels -						
1 Northern	-	-	-	2,000	-	-
2 Northern	-	-	-	16,670	1,500	-
4 Northern	-	-	-	2,000	102,833	-
5 Wheat	1,333	-	-	23,711	26,333	-
Amber Durum	-	-	4,000	2,000	17,389	14,000
All Others	-	8,931	18,797	48,587	88,597	-
Totals	1,333	8,931	22,797	94,968	236,652	14,000

Freight Assistance Shipments Claims filed for payment up to April 30, 1954, represent shipments of some 8.3 million bushels of wheat from the Prairie Provinces to Eastern Canada and British Columbia under the freight assistance plan during the first eight months of the 1953-54 crop year. During the same period of the 1952-53 crop year claims had been filed for some 9.7 million bushels indicating, on the assumption of approximately the same rate of submission of claims during both the current and preceding crop years, that the 1953-54 August-March wheat shipments under the plan were running somewhat below those in 1952-53. Revised data on shipments during the first eight months of 1952-53 based on claims submitted up to April 30, 1954, place the total at 10.0 million bushels. The bulk of the current crop year's August-March shipments went to destinations in Ontario and Quebec, with British Columbia accounting for most of the remainder.

Provincial Distribution of Freight-Assisted Wheat Shipments,
1953-54 and 1952-53

Month	Nfld.	P.E.I.	N.S.	N.B.	Que.	Ont.	B.C.	Total
- thousand bushels -								
August, 1953	6	21	61	41	393	403	237	1,160
September	8	10	64	43	474	292	217	1,108
October	10	7	59	38	379	462	226	1,182
November	13	3	52	34	405	378	203	1,088
December	5	8	67	27	366	394	217	1,084
January, 1954	10	11	66	43	339	371	204	1,045
February	3	13	48	27	331	290	151	864
March	1	5	58	21	307	319	85	795
Totals <u>1/</u>	56	80	475	275	2,993	2,908	1,538	8,325
Same period 1952-53:								
Preliminary <u>2/</u>	67	147	540	352	3,502	3,584	1,486	9,677
Revised <u>1/</u>	68	148	550	359	3,551	3,650	1,693	10,020

Preliminary data on millfeed shipments under the freight assistance plan, indicate shipments of 295,652 tons during the August-March period of 1953-54. This total, based on claims submitted up to April 30, 1954, is about 15 per cent below the preliminary total for the comparable period of 1952-53. Revised figures for the August-March period of 1952-53 show a total of 367,518 tons shipped under the plan. As with wheat, data on freight-assisted millfeed shipments are subject to upward revision with the filing of additional claims.

Provincial Distribution of Freight-Assisted Millfeed Shipments,
1953-54 and 1952-53

Province	August-March		
	1952-53		1953-54
	Preliminary <u>2/</u>	Revised <u>1/</u>	Preliminary <u>1/</u>
- tons -			
Newfoundland	2,463	2,508	2,327
Prince Edward Island	5,065	5,192	3,137
Nova Scotia	26,514	27,461	21,951
New Brunswick	23,514	23,944	19,063
Quebec	165,226	173,342	140,059
Ontario	96,955	101,727	79,004
British Columbia	26,625	33,344	30,111
Totals	346,362	367,518	295,652

1/ Based on claims filed up to April 30, 1954.

2/ Based on claims filed up to April 30, 1953.

Supply and Disposition of Wheat and Rye, Canada,
Crop Year 1952-53

Item	Wheat	Rye
- bushels -		
Stocks at commencement of crop year -		
On farms	19,262,000	1,346,000
Pacific Coast elevators	6,613,771	922
Western country elevators	98,782,136	2,232,344
Fort William-Port Arthur	13,699,828	2,922,844
Eastern elevators	37,593,896	626,555
In transit rail	19,812,200	347,317
In transit lake	4,520,226	-
Other Canadian positions	14,650,086	41,107
U.S.A. positions	2,243,683	577,308
Totals, in store July 31, 1952	217,177,826	8,094,397
1952 production	687,922,000	24,833,000
Imports 1/	17,066	14,079
Totals, supplies	905,116,892	32,941,476
Export clearances including U.S.A. 1/	385,526,541	8,993,491
Consumed in Canada -		
Human food 2/	52,303,000	238,000
Seed requirements	35,920,000	1,728,000
Industrial use 3/	181,055	562,310
Loss in handling 4/	433,073	69,242
Animal feed and waste 5/	61,567,737	5,159,815
Totals, domestic use	150,404,865	7,757,367
Stocks at end of crop year -		
On farms	79,716,000	3,155,000
Pacific Coast elevators	7,100,968	2,207
Western country elevators	154,702,768	3,417,245
Fort William-Port Arthur	29,313,116	6,535,626
Eastern elevators	48,268,285	1,440,728
In transit rail	20,289,215	571,100
In transit lake	4,133,875	115,074
Other Canadian positions	25,021,398	51,179
U.S.A. positions	639,861	902,459
Totals, in store July 31, 1953	369,185,486	16,190,618
Totals, distribution	905,116,892	32,941,476

1/ Import and export data for wheat and rye, respectively, include wheat flour in terms of wheat and rye flour in terms of rye.

2/ Food uses estimated as follows: Wheat - wheat flour and breakfast foods;
Rye - rye flour and breakfast foods.

3/ Distilling.

4/ Includes drying loss, outturn loss (lake and rail), fire loss, etc.

5/ Residual after estimating for other uses.

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

Year and Month	Overseas Clearances of Canadian Wheat ^{1/}	Exports of Canadian Wheat to U.S.A. for Domestic Use and Milling in Bond ^{2/}	Customs Exports of Canadian Wheat Flour ^{3/}	Total	Customs ^{4/} Exports of Wheat and Wheat Flour
- thousand bushels -					
<u>1951-52</u>					
August	16,921	2,240	2,581	21,742	27,182
September	16,726	2,376	3,151	22,253	22,161
October	23,764	3,830	3,851	31,445	24,212
November	29,830	5,687	4,033	39,550	34,671
December	12,075	4,701	3,683	20,459	37,347
January	14,382	1,620	3,407	19,409	18,523
February	16,010	2,574	4,180	22,764	18,472
March	15,876	1,215	5,354	22,445	21,904
April	16,657	3,342	4,389	24,387	30,516
May	35,550	2,725	5,735	44,010	38,138
June	33,770	4,554	6,101	44,425	40,894
July	34,478	3,818	4,639	42,935	44,782
Totals	266,039	38,683	51,103	355,825	358,803
<u>1952-53</u>					
August	26,089	2,559	4,031	32,679	38,946
September	21,208	3,312	4,891	29,411	27,326
October	24,106	2,950	5,474	32,530	35,611
November	34,339	3,677	5,647	43,663	36,052
December	21,777	2,883	5,146	29,806	44,468
January	17,518	1,206	3,443	22,167	23,562
February	13,135	847	3,603	17,585	18,220
March	11,220	915	4,724	16,858	15,466
April	19,019	1,341	4,508	24,867	20,061
May	40,179	1,476	6,247	47,902	35,963
June	37,390	1,617	4,880	43,887	51,752
July	40,149	115	3,906	44,170	41,498
Totals	306,129	22,897	56,501	385,527	388,926
<u>1953-54 ^{5/}</u>					
August	24,152	569	3,724	28,445	34,113
September	20,672	198	3,365	24,235	22,736
October	22,072	258	3,371	25,701	29,731
November	18,815	1,549	4,052	24,417	23,696
December	12,857	795	4,103	17,755	23,423
January	13,416	409	3,962	17,788	17,352
February	10,273	287	3,126	13,686	17,134
March	14,079	167	4,634	18,881	15,618
April	10,708	777	3,807	15,291	18,646
Totals	147,045	5,010	34,144	186,200	202,449

^{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 1951-52 and 1952-53 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, 1953-54

Destination	January	April		August—April	
	Wheat Flour 1/2/	Wheat Flour 2/	Wheat 3/	Wheat Flour 2/	Wheat 3/
- bushels -					
<u>COMMONWEALTH COUNTRIES</u>					
United Kingdom	1,292,107	1,425,947	1,659,395	11,097,860	47,863,772
<u>Africa</u>					
Gambia	3,384	2,552	-	19,805	-
Gold Coast	66,614	42,304	-	681,831	-
Nigeria	35,726	29,196	-	369,922	-
Sierra Leone	4,131	3,326	-	70,245	-
Union of South Africa	-	-	792,535	-	5,209,307
<u>Asia</u>					
Ceylon	-	-	-	242,829	-
Hong Kong	94,599	111,384	-	876,429	-
India	-	-	300	-	4,272,438
Malaya and Singapore	22,671	23,324	-	277,763	-
<u>Europe</u>					
Gibraltar	25,699	-	-	102,024	-
Malta	-	-	380,240	-	1,464,773
<u>North America</u>					
Bahamas	25,272	9,333	-	197,289	-
Barbados	13,990	46,782	150	352,395	983
Bermuda	9,310	8,280	-	85,635	-
British Honduras	2,048	4,108	-	42,642	-
Jamaica	131,378	81,018	1,000	1,508,395	3,490
Leeward and Windward Islands	71,910	104,472	-	723,393	-
Trinidad and Tobago	171,625	181,188	-	1,624,540	-
<u>South America</u>					
British Guiana	136,035	14,323	-	903,906	-
Totals, Commonwealth Countries .	2,106,499	2,087,537	2,833,620	19,176,903	58,814,763
<u>FOREIGN COUNTRIES</u>					
<u>Africa</u>					
Azores and Madeira	842	1,107	-	40,968	-
Belgian Congo	47,646	34,335	-	496,688	9,186
Canary Islands	-	-	-	918	-
Egypt	-	-	-	4,599	-
French Africa	1,724	1,719	-	7,843	-
Liberia	-	698	-	4,824	-
Libya	-	-	105,000	-	413,000
Morocco	16,871	756	-	274,095	-
Portuguese East Africa	918	4,109	56,560	10,332	398,346
Portuguese West Africa	4,248	6,097	-	32,278	-
Spanish Africa	-	-	-	14,148	-
<u>Asia</u>					
Arabia	1,282	-	-	97,474	-
Indonesia	1,836	2,295	-	72,041	-
Israel	-	-	372,400	3,060	2,981,464
Japan	204,800	5,602	235,754	896,904	28,853,177
Korea	-	-	-	953,046	-
Lebanon	10,323	23,130	-	108,387	-
Philippine Islands	393,979	467,239	-	3,909,717	-
Portuguese Asia	-	2,295	-	15,827	-
Syria	-	-	-	135	-
Taiwan (Formosa)	30,222	-	-	-	79,707
Thailand	-	24,871	-	236,187	-

Exports of Canadian Wheat and Wheat Flour by Destination, 1953-54

Destination	January	April		August—April	
	Wheat Flour 1/2/	Wheat Flour 2/	Wheat 3/	Wheat Flour 2/	Wheat 3/
	- bushels -				
Europe					
Austria	-	-	-	-	350,000
Belgium	-	-	479,946	-	10,541,805
Denmark	-	-	-	1,125	878,700
France	-	-	-	4,545	709,334
Germany, Federal Republic of	51,345	45,189	750,312	411,183	11,671,941
Iceland	19,777	9,455	-	159,894	-
Ireland	-	-	-	-	1,801,221
Italy	-	-	18,372	163,143	382,922
Netherlands	-	-	380,800	16,047	5,553,003
Norway	-	-	68,133	-	2,112,757
Portugal	17,694	-	-	50,737	354,667
Spain	-	-	-	-	3,424,966
Switzerland	-	-	1,492,662	-	8,496,291
Yugoslavia	2,295	230	-	17,568	-
North America					
Alaska	-	-	-	4	-
Costa Rica	27,167	41,499	-	310,869	23,334
Cuba	45,554	117,553	82,286	628,038	1,148,347
Dominican Republic	35,325	60,944	-	344,525	-
El Salvador	16,506	21,794	-	226,661	-
French West Indies	625	513	-	4,540	-
Guatemala	19,431	32,054	-	335,061	-
Haiti	63,941	66,798	-	502,709	-
Honduras	1,260	4,576	-	18,229	6,667
Mexico	90	-	-	549	-
Netherlands Antilles	16,780	19,975	-	173,322	-
Nicaragua	33,241	29,858	-	247,154	-
Panama	23,184	40,829	-	260,942	-
St. Pierre and Miquelon	-	2,506	-	15,169	-
United States					
Flour in terms of wheat	2,871	36,963	-	84,672	-
For milling in bond 4/	-	-	-	-	1,402,244
For domestic use 4/	-	-	776,867	-	3,607,803
Virgin Islands	2,295	-	-	9,180	-
Oceania					
Guam	-	1,147	-	1,147	-
South America					
Bolivia	1,147	-	-	17,626	846,120
Brazil	63	-	3,542,143	1,440	3,922,943
Colombia	59,391	46,404	178,235	489,708	741,111
Ecuador	-	-	109,655	41,031	1,008,055
Peru	2,066	-	-	24,084	1,514,151
Surinam	17,617	20,200	-	146,340	-
Venezuela	497,358	546,255	2,000	3,080,777	7,480
Totals, Foreign Countries	1,671,714	1,718,995	8,651,125	14,967,490	93,240,742
Totals, All Countries	3,778,213	3,806,532	11,484,745	34,144,393	152,055,505

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

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

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

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

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

Class and Grade	Week ending			
	April 30	May 7	May 14	May 21
- cents and eighths per bushel -				
<u>Initial Payment to Producers</u>				
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	112	112	112	112
6 Wheat	106	106	106	106
Feed Wheat	100	100	100	100
1 C.W. Garnet	134	134	134	134
2 C.W. Garnet	131	131	131	131
1 Alberta Red Winter	137	137	137	137
2 Alberta Winter	134	134	134	134
1 C.W. Amber Durum	150	150	150	150
2 C.W. Amber Durum	147	147	147	147
3 C.W. Amber Durum	140	140	140	140
<u>International Wheat Agreement and Domestic Sales</u>				
1 Northern	183/1	183	182/7	182/7
2 Northern	177/1	177	176/7	176/7
3 Northern	175/1	175	174/7	174/7
4 Northern	169/1	169	168/7	168/7
5 Wheat	166/1	166	165/7	165/7
6 Wheat	165/1	165	164/7	164/7
Feed Wheat	161/1	161	160/7	160/7
1 C.W. Garnet	173/1	173	172/7	172/7
2 C.W. Garnet	170/1	170	169/7	169/7
3 C.W. Garnet	166/1	166	165/7	165/7
1 Alberta Red Winter	177/1	177	176/7	176/7
2 Alberta Winter	175/1	175	174/7	174/7
3 Alberta Winter	171/1	171	170/7	170/7
1 C.W. Amber Durum 1/	202/1	202	201/7	201/7
2 C.W. Amber Durum 1/	200/1	200	199/7	199/7
3 C.W. Amber Durum 1/	199/1	199	198/7	198/7
<u>Export - Class II</u>				
1 Northern	183/1	183	182/7	182/7
2 Northern	177/1	177	176/7	176/7
3 Northern	175/1	175	174/7	174/7
4 Northern	169/1	169	168/7	168/7
5 Wheat	166/1	166	165/7	165/7
6 Wheat	165/1	165	164/7	164/7
Feed Wheat	161/1	161	160/7	160/7
1 C.W. Garnet	173/1	173	172/7	172/7
2 C.W. Garnet	170/1	170	169/7	169/7
3 C.W. Garnet	166/1	166	165/7	165/7
1 C.W. Amber Durum	278	278	278	278
2 C.W. Amber Durum	276	276	276	276
3 C.W. Amber Durum	275	275	275	275

1/ Prices of Durums sold for domestic use are ten cents per bushel higher than indicated in the table.

Canadian Wheat Board Weekly Average Cash Wheat Prices
Basis in Store Vancouver

Class and Grade	Week ending			
	April 30	May 7	May 14	May 21
- cents and eighths per bushel -				
<u>Initial Payment to Producers</u>				
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	112	112	112	112
6 Wheat	106	106	106	106
Feed Wheat	100	100	100	100
1 C.W. Garnet	134	134	134	134
2 C.W. Garnet	131	131	131	131
1 Alberta Red Winter	137	137	137	137
2 Alberta Winter	134	134	134	134
1 C.W. Amber Durum	150	150	150	150
2 C.W. Amber Durum	147	147	147	147
3 C.W. Amber Durum	140	140	140	140
<u>International Wheat Agreement</u>				
<u>and Domestic Sales</u>				
1 Northern	190/1	190	189/7	189/7
2 Northern	185/1	185	184/7	184/7
3 Northern	181/1	181	180/7	180/7
4 Northern	175/1	175	174/7	174/7
5 Wheat	166/1	166	165/7	165/7
6 Wheat	165/1	165	164/7	164/7
Feed Wheat	161/1	161	160/7	160/7
1 C.W. Garnet	173/1	173	172/7	172/7
2 C.W. Garnet	170/1	170	169/7	169/7
3 C.W. Garnet	166/1	166	165/7	165/7
1 Alberta Red Winter	184/1	184	183/7	183/7
2 Alberta Winter	182/1	182	181/7	181/7
3 Alberta Winter	178/1	178	177/7	177/7
<u>Export - Class II</u>				
1 Northern	190/1	190	189/7	189/7
2 Northern	185/1	185	184/7	184/7
3 Northern	181/1	181	180/7	180/7
4 Northern	175/1	175	174/7	174/7
5 Wheat	166/1	166	165/7	165/7
6 Wheat	165/1	165	164/7	164/7
Feed Wheat	161/1	161	160/7	160/7
1 C.W. Garnet	173/1	173	172/7	172/7
2 C.W. Garnet	170/1	170	169/7	169/7
3 C.W. Garnet	166/1	166	165/7	165/7
1 Alberta Red Winter	184/1	184	183/7	183/7
2 Alberta Winter	182/1	182	181/7	181/7
3 Alberta Winter	178/1	178	177/7	177/7

CANADIAN FLOUR MILLING SITUATION

Production The production of Canadian wheat flour reported by Canadian mills for April 1954 amounted to 1,763,000 barrels, below both the March 1954 output of 1,830,000 barrels and the April, 1953 output of 1,916,000 barrels. The ten-year (1943-44-1952-53) average April production was 1,980,000 barrels. Mills reporting operations during April 1954 had a total rated capacity of 97,619 barrels per 24-hour day, and on the basis of a 25-day working period 72.2 per cent of this rated capacity was effective.

Wheat milled for flour during the month amounted to 7.8 million bushels, as against 8.1 million bushels milled during the preceding month and 8.5 million bushels milled during the same month last year. Of the wheat milled for flour during April, 1954 some 7.0 million bushels were Western Canadian Spring wheat (other than Durum). Most of the balance consisted of Ontario Winter wheat (530,000 bushels) and Durum wheat (66,000 bushels).

Exports According to preliminary Customs returns, exports of Canadian wheat flour during April, 1954 amounted to 845,896 barrels (3,807,000 bushels of wheat equivalent), representing a decline of some 18 per cent from the exports of the preceding month. Flour shipments during the month went to forty-eight countries and colonies, with the United Kingdom accounting for 1.4 million bushels of wheat equivalent or 37 per cent of the total. Other countries receiving shipments in excess of one hundred thousand bushels were as follows, in thousands of bushels: Venezuela (546); Philippine Islands (467); Trinidad and Tobago (181); Cuba (118); Hong Kong (111); Leeward and Windward Islands (104).

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

Crop Year	Wheat Milled for Flour	Wheat Flour	
		Production	Exports ^{1/}
	- bushels -	- barrels of 196 pounds -	
1935-36-1939-40 average	67,845,114	15,002,781	4,899,970
1940-41-1944-45 average	99,704,638	22,402,166	12,091,605
1945-46	118,074,774	26,435,341	14,470,177
1946-47	127,775,176	28,588,456	16,896,233
1947-48	109,822,011	24,159,696	13,661,573
1948-49	90,896,984	20,379,997	10,687,561
1949-50	90,082,917	20,259,200	10,151,090
1950-51	106,748,343	23,630,180	12,426,996
1951-52	104,494,021	22,842,441	11,356,288
1952-53	106,727,237	23,865,625	12,555,714
1953-54 ^{2/}			
August	6,345,959	1,423,693	827,588
September	7,692,345	1,742,629	747,741
October	8,420,739	1,909,488	749,098
November	8,216,541	1,866,563	900,514
December	8,018,819	1,815,315	911,726
January	7,350,931	1,661,799	880,532
February	7,567,133	1,717,646	694,768
March	8,099,356	1,829,768	1,029,780
April	7,792,667	1,763,146	845,896
Totals	69,504,490	15,730,047	7,587,643
Same period 1952-53 (revised) .	79,855,108	17,830,664	9,214,917

^{1/} Based on Customs returns. Exports for the crop years 1945-46-1952-53 revised to remove effect of time lag in the returns made by Customs.

^{2/} Subject to revision.

UNITED STATES SITUATION

Supply Position Total estimated supplies of wheat in the United States for the 1953-54 crop year amount to some 1,734.7 million bushels, consisting of a carryover of 562.5 million, the 1953 crop of 1,168.5 million and July-April imports of 3.7 million bushels of Canadian wheat. After deducting estimated domestic requirements of 661.0 million bushels, some 1,073.7 million bushels remain available for export and for carryover during 1953-54 compared with 873.8 million available during 1952-53.

United States Wheat Supplies

Item	1952-53	1953-54 <u>1/</u>
	- million bushels -	
Carryover at beginning of crop year (July 1)	255.7	562.5
New crop	1,291.4	1,168.5
Total estimated domestic supplies	1,547.1	1,731.0
Imports of wheat for domestic use, July-April	18.7	3.7
Total estimated supplies <u>2/</u>	1,565.8	1,734.7
Less estimated domestic requirements for crop year <u>3/</u>	692.0	661.0
Available for export and for carryover	873.8	1,073.7
Deduct:		
Exports of wheat as grain, July-April	246.9	143.8
Exports of wheat flour and products in terms of wheat, July-April	34.3	26.7
Total exports of wheat, wheat flour and products	281.3	170.5
Balance on May 1 for export and for carryover	592.5	903.2

1/ Preliminary.

2/ Excluding imports for May-June period.

3/ 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.

Total exports of wheat, wheat flour and products during the July-April period of the current crop year amounted to 170.5 million bushels as against exports of 281.3 million during the same period of 1952-53. The balance remaining on May 1, 1954 for export and for carryover was estimated at 903.2 million, exceeding by some 310.7 million bushels the amount available at the same date in 1953.

Winter Wheat Crop
Estimate Increased

In a report released on May 10, the Crop Reporting Board of the United States Department of Agriculture stated that the winter wheat crop for harvest in 1954 is forecast at 707 million bushels, 29 million bushels more than on April 1. This compares with 878 million bushels produced last year and average production of 833 million bushels. Production prospects improved during April in nearly all

States in the eastern half of the country, with the most marked improvement in Ohio, Indiana, Illinois, and Missouri. In the western Great Plains wheat area from the Oklahoma Panhandle and New Mexico to Wyoming, soil moisture continued short during most of April. Some improvement in Texas and Oklahoma wheat was noted following timely mid-April rainfall. Likewise, beneficial rains fell during the last few days of April and in early May over most of the western Great Plains. Warm weather over most of the winter wheat producing areas during April resulted in plant growth being further advanced than usual on May 1.

The acreage of winter wheat for harvest is estimated at 37.8 million acres. This acreage is about one-fifth less than the 46.7 million acres harvested in 1953 and the average acreage harvested during 1943-52. The portion of the seeded acreage that will not be harvested for grain is estimated at 18.8 per cent, compared with 17.9 per cent in 1953, 10.6 per cent in 1952 and the average of 11.9 per cent. Based on May 1 conditions, the indicated yield per harvested acre is 18.7 bushels, compared with 18.8 bushels last year and the 10-year average of 17.7 bushels.

In Kansas, production prospects improved slightly during April. The month was warmer than normal and precipitation varied from somewhat above normal in southeastern Kansas to only about a tenth of normal in some western areas. Prospects throughout the eastern third and in many north central areas of the State improved during April. However, prospects deteriorated during most of April in the important south central Kansas area, but rains in late April and early May have greatly relieved the dry soil conditions there. Above normal temperatures in April resulted in rapid development of the crop and, based on advanced development to date, an early harvest is anticipated. Nearly three-fourths of the Kansas crop had jointed and about one-fifth was headed or heading on May 1.

The wheat crop in Oklahoma and Texas was improved by April rains. However, considerable acreage in the western section of these States was abandoned due to extended drought conditions prior to the April rains. In the Panhandle areas of these two States rainfall in May is essential to bring much of the surviving wheat to maturity. With above normal temperature during most of April, growth and development of the crop was rapid in both States.

In Nebraska, lack of moisture during most of April, especially in southwestern areas, was unfavorable for the crop. However, moisture supplies over much of the State improved toward the end of the month and prospective production is about the same as on April 1. Development of the crop is farther along than usual for May 1.

In Colorado, wheat throughout most of the eastern plains area suffered considerably because of dry windy weather and above normal temperatures during April. Prospective production in Colorado declined about $5\frac{1}{2}$ million bushels during April.

In most of the winter wheat States east of the Mississippi River, production prospects improved during April. Above normal temperature and generally adequate moisture favored rapid growth, so that development of the crop was ahead of normal for May 1.

In Washington, Oregon, Montana and most of Idaho, cool temperatures during April retarded growth of winter wheat. Abandonment of winter wheat acreage in this area is expected to be less than average. Moisture supplies have been generally adequate in Montana and north Idaho, and prospects improved slightly. In Washington and Oregon, prospective production declined slightly during April.

Flour Production The Bureau of the Census, Department of Commerce, estimates wheat flour production in the United States in March 1954 at 18,871,000 sacks, an average of 820,000 sacks per working day. This compares with a daily average of 868,000 sacks during the previous month, and 844,000 in March, 1953. Production of wheat flour in March was at 77.0 per cent of capacity compared with 81.7 and 78.0 per cent, respectively, for the previous month and the same month a year ago.

Flour mills in March ground 43,729,000 bushels of wheat compared with 40,222,000 bushels ground in February. Wheat offal output in March amounted to 376,594 tons. These figures represent the production of all commercial mills in the United States. About 97 per cent of the total are reported by the 375 largest mills and the balance estimated. The estimated portion is based on a survey of the smaller mills in 1950.

Per Capita Wheat A new low figure for civilian per capita wheat flour
Flour Consumption consumption has been reported by the United States
Set at 126.5 pounds Department of Agriculture. According to the latest issue of the Wheat Situation, per capita wheat flour use in 1953 was 126.5 pounds. For 1952, the latest report placed civilian per capita flour consumption at 130.4 pounds.

CCC Grain Sales Sales of wheat by the Commodity Credit Corporation during the week ended May 21 totalled 4,134,818 bushels. These sales included 3,633,079 bushels for export (of which 1,595,902 bushels were shipped under the export sales program, announcements GR-261 and 262, and the balance barter contracts for strategic materials), 293,142 bushels no longer suitable for storage, 197,953 domestic sales, and 10,644 bushels shipped under the Emergency Drought Program.

USDA to Again Accept Applications for grain storage occupancy contracts
Applications for Grain between the Commodity Credit Corporation and
Storage Occupancy Contracts commercial firms will again be accepted, beginning immediately, in order to encourage the construction during the coming months of additional public commercial facilities for the handling and storage of grains and oilseeds in the storage short areas of the U.S. Contracts now in effect call for construction under this program of a net total of about 200 million bushels of capacity, with 123 million bushels of this now under construction. In general, the program provides for payments to warehousemen if the occupancy of storage facilities under contract falls below certain levels during a specified period.

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
April 30, 1954	242 1/2 - 250	April 30, 1954	236 1/2 - 238 1/2
May 3	242 1/2 - 244	May 3	234 1/4 - 236 1/4
4	246	4	234 3/8 - 236 3/8
5	243 1/2 - 248	5	236 5/8 - 238 5/8
6	245	6	233 1/2 - 235 1/2
7	243 - 246	7	232 1/2 - 234 1/2
10	243 1/2 - 245 3/4	10	232 1/2 - 234 1/2
11	239 3/4 - 247 1/2	11	230 1/8 - 232 1/8
12	238 3/4 - 246	12	232 - 234
13	224 - 231 1/2	13	234 3/8 - 236 3/8
14	227 1/4 - 262 1/2	14	232 1/8 - 234 1/8
17	227 1/2 - 231 1/2	17	228 1/2 - 230 1/2
18	233 - 243	18	228 7/8 - 230 7/8
19	235 1/2	19	227 5/8 - 229 5/8
20	235 1/2 - 239	20	229 7/8 - 231 7/8
21	234 1/2 - 242 1/2	21	230 1/4 - 232 1/4
24	239 1/2 - 241 1/2	24	229 3/4 - 231 3/4
25	237 3/4 - 240	25	230 7/8 - 232 7/8
26	238 3/4 - 243 3/4	26	231 - 233
27	237 - 241 3/4	27	229 1/8 - 231 1/8
28	227 5/8	28	227 7/8 - 229 7/8
31	Memorial Day	31	Memorial Day

Chicago Wheat Futures, High Points of Closing

Date	May	July	September	December	March
	- cents and eighths per bushel -				
May 3, 1954	200/4	195/5	198/5	203/2	
4	199/6	196	199/3	204	
5	203/6	199/4	202/7	207/5	
6	201/6	195/2	198/4	203/6	
7	202/4	196	199	204/2	
10	200	193/6	197	202	
11	196/1	190/3	193/3	198/2	
12	198/2	192/3	195/4	200/4	
13	198/1	193/2	196/3	201/3	
14	199	195	198	203/5	
17	199	194/3	197/4	202/4	
18	200/2	197/2	200/4	205/6	
19	200	195/3	198/5	204	
20		195/1	198/3	203/7	205/6
21		196/1	199/2	204/4	206/2
24		196/3	199/2	204	206
25		196/1	199	203/6	205/6
26		195	198/4	203	205
27		192/7	196	200/7	203/2
28		193/1	196/3	201/2	203/2
31			- Memorial Day -		

ARGENTINE SITUATION

Supply Position Total estimated supplies of wheat in the Argentine for the 1953-54 crop year at 293.3 million bushels remain unchanged from a month ago. After deducting estimated domestic requirements of 128.6 million bushels some 164.7 million are available for export and for carryover during 1953-54 compared with 154.8 million available during 1952-53. Exports of wheat as grain and wheat flour in terms of wheat during the December—April period of the current crop year totalled 43.6 million bushels as against the comparable 1952-53 total of 10.6 million. The balance on May 1 for export and for carryover at the end of the crop year amounted to 121.1 million bushels compared with 144.2 million available at the same date a year ago.

Argentine Wheat Supplies

Item	1952-53	1953-54 <u>1/</u>
	- million bushels -	
Carryover at beginning crop year (December 1)	1.8	72.8
New crop	280.5	220.5
Total estimated domestic supplies	282.3	293.3
Imports of wheat for domestic use	-	-
Total estimated supplies	282.3	293.3
Less estimated domestic requirements for crop year ..	127.5	128.6
Available for export and for carryover	154.8 <u>2/</u>	164.7 <u>2/</u>
Deduct:		
Exports of wheat as grain, December—April	10.6	42.6
Exports of wheat flour in terms of wheat, December—April	<u>3/</u>	0.9
Total exports of wheat and wheat flour	10.6	43.6
Balance on May 1 for export and for carryover	144.2	121.1

1/ Preliminary. 2/ Includes 400,000 metric tons (14.7 million bushels) of wheat stored to constitute a reserve. 3/ Less than 50,000 bushels.

The following account of the Argentine situation has been extracted from a report from Mr. W. F. Hillhouse, Agricultural Secretary, Canadian Embassy, Buenos Aires, under date of May 15, 1954, and is reproduced with the permission of the Trade Commissioner Service, Department of Trade and Commerce. Where possible, 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 dollars.

Weather and Crops Medium to heavy rains fell throughout the whole grain zone during the second half of April which improved the workability of the soil for planting winter feeds and bread grains. Dryness in February and early March has made sowing of these grains a little late this year but conditions during the past month have been quite favourable. The heavy rains of last month have hindered the drying of the corn crop and probably caused a certain lowering of overall quality. The sunflower crop has reportedly deteriorated in some zones as a result of the earlier dry weather. For the most part pastures are in good condition.

1953-54 Wheat Crop The past month has again seen some activity in wheat sales with more than 350,000 metric tons (12,860,000 bushels) being sold mainly to Brazil, Japan, Chile and the sterling area. It is estimated that due to rather heavy sales during the previous six weeks there was a backlog of sold unshipped wheat amounting to approximately 600,000 tons (22,046,000 bushels) as of May 1.

Although shortages of most grains have developed in shipping positions wheat supplies appear to remain adequate in all ports except Bahia Blanca. Any such wheat shortage is, of course, only temporary due to transportation and administrative difficulties. Shortages of rye and barley on the other hand reflect growing scarcity of these grains.

Official Producer Prices The Minister of Foreign Trade has announced that the official producer prices for wheat, flax, oats, barley and rye in 1954-55 will remain unchanged from those established for the previous year. These are given in the following table.

Argentine Official Producer Prices

Commodity	Price per bushel in sacks on rail in ports
	- dollars -
Wheat	\$ 2.72
Flax	3.30
Rye	2.13
Oats	1.17
Barley	1.87

Sales Sales of wheat and corn in the last four weeks totalled over a million tons and there was some activity in oats. Rye and barley sales were practically at a standstill, stocks being fully committed.

Wheat - Brazil purchased 150,000 tons (5,512,000 bushels) of wheat on May 12 at 475 pesos per metric ton (\$2.59 per bushel), f.o.b., the same price at which the 100,000 tons (3,674,000 bushels) were acquired by that country in April. On April 30 the sale was announced of 201,939 tons (7,420,000 bushels) of which it is estimated that 97,939 tons (3,599,000 bushels) were sold for sterling at 305 pesos per tons (\$1.66 per bushel), 64,000 tons (2,352,000 bushels) to Japan at 315 pesos per ton (\$1.71 per bushel) and the balance of 40,000 tons (1,470,000 bushels) to Chile at 350 pesos (\$1.91 per bushel) for payment in

agreement dollars. It is understood that the sterling sale represents a barter for hessian cloth which was conducted at the approximate ratio of 1 hessian to 6 wheat f.o.b. Calcutta and Buenos Aires, respectively. The Japanese sale was reportedly a barter under the Argentine-Japanese trade agreement. Hungary purchased 8,500 tons (312,000 bushels) of wheat at 320 pesos (\$1.74 per bushel) on April 15.

Grain Shipments Grain shipments in April totalled 587,797 metric tons of which wheat accounted for 226,638 tons (8,328,000 bushels). The cumulative total for the first four months of the year for all grains shipped from Argentina, according to trade statistics, aggregates 2,346,975 tons*.

Wheat shipments in April were destined principally for Brazil and Poland with 45,473 tons and 44,239 tons (1,671,000 and 1,626,000 bushels), respectively. Next in order were Japan with 35,071 tons (1,289,000 bushels) and Germany with 26,738 tons (982,000 bushels). Denmark, The Netherlands and the United Kingdom accounted for 14,767 tons (543,000 bushels), 12,638 tons (464,000 bushels) and 10,445 tons (384,000 bushels) followed by Hungary with 9,350 tons (344,000 bushels). Switzerland, Peru and Paraguay were the destinations for 6,600 tons (243,000 bushels), 5,978 tons (222,000 bushels) and 5,606 tons (206,000 bushels) in that order and the balance was shipped to Belgium 5,408 tons (199,000 bushels), Chile 3,300 tons (121,000 bushels) and Austria 1,025 tons (38,000 bushels).

Rye shipments dropped to 118,147 tons (4,651,000 bushels) in April. Poland continued as chief outlet but with 41,686 tons (1,641,000 bushels) received only half of the quantity destined to that country last month and had by the end of April received 130,360 tons (5,132,000 bushels) of the 300,000 tons (11,810,000 bushels) purchased in January. The Netherlands and Belgium accounted for 33,552 tons (1,321,000 bushels) and 21,400 tons (842,000 bushels) while Denmark and Italy received 10,225 tons (403,000 bushels) and 8,185 tons (322,000 bushels), respectively. Of the balance Norway received 1,733 tons (68,000 bushels), Germany 1,126 tons (44,000 bushels) and Switzerland 240 tons (9,400 bushels).

Barley shipments at 107,273 tons (4,927,000 bushels) were at their highest since October last. The Netherlands was the chief destination with 54,365 tons (2,497,000 bushels). Other outlets included Belgium 12,018 tons (552,000 bushels), Denmark 9,908 tons (455,000 bushels), Germany 9,000 tons (413,000 bushels), Hungary 8,580 tons (394,000 bushels), Austria 7,155 tons (329,000 bushels) and Switzerland 6,247 tons (287,000 bushels).

The Netherlands also occupied first place in oats shipments, taking 22,206 tons (1,440,000 bushels). Denmark followed with 20,952 tons (1,359,000 bushels) and Belgium and Austria with 17,586 tons (1,140,000 bushels), and 16,021 tons (1,039,000 bushels), respectively. Germany accounted for 11,829 tons (767,000 bushels), Switzerland 5,764 tons (374,000 bushels) and Italy 4,950 tons (321,000 bushels) of the April total.

*The cumulative total has been adjusted according to revised figures received from the trade whereby the three-month total aggregates 1,759,178 tons instead of 1,764,072 tons reported last month.

With commencement of deliveries from the new crop, shipments of corn at 33,323 tons (1,312,000 bushels) showed a slight improvement over last month's total. Principal customers were France and Belgium with 9,570 tons (377,000 bushels) and 9,300 tons (366,000 bushels), respectively. The Netherlands followed with 6,254 tons (246,000 bushels), Switzerland and Finland accounted for 3,196 tons (126,000 bushels) and 2,483 tons (98,000 bushels) and the balance was received by Italy 1,000 tons (39,000 bushels), Germany 627 tons (25,000 bushels), Africa 501 tons (20,000 bushels) and the United Kingdom 392 tons (15,000 bushels).

Flaxseed shipments to France in April were 3,108 tons (122,000 bushels), part of the 11,000 tons (433,000 bushels) sold to that country in March.

The following table gives shipments of all grains from Argentina in the first four months of 1954 by destination:

Argentine Grain Shipments, January—April, 1954, with Comparisons

Destination	Wheat	Corn	Flax	Oats	Rye	Barley
- thousand bushels -						
Austria	38	-	-	1,291	-	644
Belgium	1,791	1,416	-	2,956	4,055	2,976
Brazil	5,165	-	-	9	-	-
Chile	305	-	-	-	-	-
Denmark	1,053	39	-	3,459	1,903	625
Finland	-	98	-	-	394	-
France	96	2,132	122	-	-	53
Germany	9,489	3,694	-	1,530	1,643	507
Hungary	344	-	-	143	926	752
Israel	-	-	-	-	404	-
Italy	18	441	-	946	3,899	104
Japan	3,457	-	-	-	-	-
Netherlands	2,747	892	-	7,688	3,632	5,738
Norway	-	591	-	-	106	-
Paraguay	570	-	-	-	-	-
Peru	1,416	-	-	-	-	-
Poland	1,626	-	-	-	5,132	-
South Africa	-	50	-	-	-	-
Switzerland	927	272	-	1,645	126	866
United Kingdom ...	2,987	1,033	-	-	227	1,706
United States	-	-	-	1,539	-	-
Totals	32,031	10,657	122	21,205	22,447	13,971
Same period:						
1953	10,416	8,208	-	2,424	740	4,665
1952	2,147	10,142	905	2,368	4,193	4,779
1951	42,378	428	4,317	1,381	4,169	321

URUGUAYAN SITUATION

The following report was received from Mr. Gibson Smith, Commercial Secretary, Canadian Embassy, Montevideo, under date of April 29, 1954, and is reproduced with the permission of the Trade Commissioner Service, Department of Trade and Commerce. Currency conversions have been made at the rate of 1 peso = \$0.6493 (Canadian), the quotation in effect on April 30, 1954.

Uruguay seldom enters the world picture as an exporter of wheat but a combination of factors will this year leave her with an exportable surplus of some 300,000 tons (11,023,000 bushels).

The 1953-54 wheat harvest is expected to amount to the record figure of 707,076 metric tons or about 26 million bushels, up no less than 66 per cent from the year before. The total area sown for this 1953-54 crop was 1,670,461 acres, up 32 per cent from the previous year. The average yield per acre is estimated at 15.48 bushels as against 13.34 bushels in the previous crop.

The expansion in wheat sowing has been extraordinarily large and beats all past records, in fact the total area cultivated exceeds by 2.6 per cent that of 1948-49 which held the previous all-time record. The outstanding factors which mostly contributed to this abnormally large production are better mechanization, timely and well spaced rainfalls and the benefits of climatological conditions with cold weather which prevailed well into spring.

The Government of Uruguay has for over a period of about eight years, in order to protect the interests of farmers, entrusted the Banco de la Republica (Central Bank), with the purchase and disposal of the wheat and also with the export of surplus grain stocks and flour. The record volume of the 1953-54 crop, it is feared, will tax heavily the resources of that Bank and in the face of this difficulty a decree has been passed (of which a translation is enclosed) authorizing the Banco de la Republica to issue notes against receipts of wheat of this crop. The notes issued for this purpose will be cancelled by the Issue Department of that Bank as and when credits are received through the export of wheat and/or flour as well as through the local sales of flour. Any losses resulting from the financing of such operations will be charged to the Exchange Profits Fund carried by that Bank. (The losses through subsidies granted for handling the 1952-53 crop amounted to 28,000,000 pesos, about \$18 million at the official rate).

Taking as a basis an estimated crop of 710,000 tons (26,100,000 bushels) and the original official price of 16.50 pesos per 100 kilos (\$2.92 per bushel) as a minimum fixed by-law for producers (say 165 pesos (\$107.00) per ton), the amount of new issue involved is 117,150,000 pesos Uruguayan (\$76,100,000). However, it is considered that it is most unlikely that this figure will be reached due to the fact that as the crop comes into market, sales and exports will be effected, and the corresponding cover obtained.

Of the total crop, nearly half, 340,000 tons (12,493,000 bushels) will be absorbed locally. In addition to this, 220,000 tons (8,084,000 bushels) are to be exported to Brazil under a commercial agreement now awaiting signature, (represented by 100,000 tons (3,700,000 bushels) in grain and 80,000 tons in

flour), and a further 60,000 tons (2,205,000 bushels) which will be used as seed for resowing for the next year's crop, thereby making a total of approximately 620,000 tons (22,781,000 bushels) accounted for, which leaves a balance of about 80,000 tons (2,939,000 bushels) to be disposed of by the Bank in other export markets. Paraguay may be a purchaser of this balance either in grain or flour.

Although at first glance the abnormally large crop of wheat this year would appear to have been difficult to dispose of, the problem has been, it would appear at least, satisfactorily overcome. In short, the State Bank finances the producers or farmers and is also the sole exporter.

Crops such as the one under review are most exceptional, in fact the general average may be considered more in the proximity of 400,000 tons (14,697,000 bushels) per annum, which would barely allow for an export surplus.

AUSTRALIAN SITUATION

Supply Position Total estimated supplies of wheat in Australia for the 1953-54 crop year now stand at 234.9 million bushels, consisting of a carryover of 35.9 million bushels and the 1953 crop placed at 199.0 million bushels. With domestic requirements estimated at 77.5 million bushels, some 157.4 million were available for export and for carryover during the current crop year compared with 136.4 million available during 1952-53. Exports of wheat as grain and wheat flour in terms of wheat during the period December 1, 1953 to April 24, 1954 totalled 21.4 million bushels as against 40.6 million bushels exported during the same period of 1952-53. The balance on April 25, for export and for carryover at the end of the crop year amounted to 136.0 million bushels compared with 95.8 million available at the same date a year ago.

Australian Wheat Supplies

Item	1952-53	1953-54 <u>1/</u>
- million bushels -		
Carryover, including flour as wheat, at beginning of crop year (December 1)	18.0	35.9 <u>2/</u>
New crop	195.2	199.0
Total estimated supplies	213.2	234.9
Less estimated domestic requirements for crop year ..	76.8	77.5 <u>2/</u>
Available for export and for carryover	136.4	157.4
Deduct:		
Exports of wheat as grain, December 1 to April 24 ..	23.3	10.2
Exports of wheat flour in terms of wheat, December 1 to April 24	17.3	11.2
Total exports of wheat and wheat flour	40.6	21.4
Balance on April 25 for export and for carryover	95.8	136.0

1/ Preliminary. 2/ Revised.

The following account of the Australian situation has been extracted from a report from Mr. R. W. Blake, Commercial Secretary for Canada, Melbourne, under date of May 18, 1954 and is reproduced with the permission of the Trade Commissioner Service, Department of Trade and Commerce. Currency conversions have been made at the rate of £1 equals \$2.2250 (Canadian), the quotation in effect on April 30, 1954.

1953-54 Wheat Harvest and Acreage A Statistical Summary of the Australian Wheat Industry published by the Commonwealth Bureau of Census and Statistics in April, 1954, states that it is estimated the 10,691,000 acres sown to wheat in 1953 produced a total crop of 199 million bushels, representing an average yield of 18.6 bushels per acre.

The acreage sown in 1953 was 482,000 acres more than in 1952 but 3,189,000 acres less than in the record post-war year 1947. The estimated production of 199 million bushels is 21.1 million bushels (9.6 per cent) less than the record 1947-48 harvest, but is 3.8 million bushels (1.9 per cent) more than in 1952-53, and 44.7 million bushels (30 per cent) more than average production for the five years ended 1938-39.

The estimated 1953-54 average yield of 18.6 bushels per acre is second only to the record 19.1 bushels per acre of 1952-53, and is 6.7 bushels per acre higher than the average yield for the five years ended 1938-39.

Wheat Acreage 1954 Present indications are that, provided seasonal conditions are favourable, the area sown to wheat in the current season will be about the same as last year.

Most of the Commonwealth wheat area has received enough rain for seeding purposes, except northern New South Wales, which is very dry. The greater part of the wheat area in that State needs from one to two inches of rain urgently, according to the State's cereal expert. However, with modern equipment, the land prepared for wheat could soon be planted if good rains came.

Wheat Storage and Sales The Australian Wheatgrowers' Federation, at their conference last week, decided to ask the Federal Government to approach the British Government to purchase larger quantities of Australian wheat and to maintain reciprocal trade relations between the United Kingdom and Australia.

It was reported in the press that 2 million bushels of wheat have been sold to India at 14s.11d. (\$1.66) f.o.b. for shipment this month. This is the lowest price that Australian wheat has been sold at, overseas, for a long time.

In a report to the Federation, the Chairman of the Australian Wheat Board emphasized the seriousness of the position regarding lack of sales of Australian wheat overseas and the inadequacy of storage facilities in Australia.

The Commonwealth Government has approved steps necessary to ensure that sufficient storage will exist in Australia to take care of the 1954-55 harvest. The urgent need for additional storage had called for quick decisions if the new storages were to be completed in time for the next harvest. The cost of providing this storage will be up to £3.5 million (\$7,800,000). The cost to the wheat-grower would be on the same basis as charged him for present storage facilities, namely, interest, normal depreciation and operating costs, including maintenance.

Most of the increased storage will be needed in Victoria and New South Wales, where the wheat handling facilities are the responsibility of the States. The State bulk handling authorities through their respective governments will be given an option to purchase these storages at their depreciated value at the time of sale.

Wheat Marketing Plan Failing to get agreement of all States on the proposed Commonwealth Wheat Stabilisation Plan - Victoria abstaining - legislation was enacted recently providing for the refund of wheat export tax totalling about £A9 million (\$20,000,000) levied on exports from No. 15 Pool (1951-52 season). A payment of 1s.4.26d. (15 cents) per bushel, bulk, and 13.936d. (13 cents) per bushel bagged, will be made as from 11th May, 1954. This payment includes interest and a small sum remaining in Pool funds as well as the tax. No contributions were made to the Fund from the 1952-53 harvest.

The Wheat Marketing Plan now embodied in complementary Commonwealth and State legislation provides for the orderly marketing of Australian wheat for the three crop years 1953-54 to 1955-56. It is a continuation of orderly marketing on lines almost identical with the system operating under the Australian Wheat Board during the last five seasons, without the provisions of stabilisation. The Plan has been outlined in previous reports.

The Prime Minister, in an election speech recently, said that the government's plan still stood and was still open for acceptance.

Pastoral Conditions Queensland - Most of the State has had rain and is in good condition. The south-east coastal region has been very dry, with scattered showers not helping much. In addition, a devastating invasion of caterpillars occurred along the coastal dairying regions of the south, further deteriorating pastures and severely reducing dairy production. All south coast districts would welcome immediate rain to promote late pasture growth and to ensure a rapid growth of winter fodder crops just planted.

Central Australia - Vast areas of northern South Australia, western New South Wales and parts of the Northern Territory are still in the grip of severe drought, and rains are needed badly.

Soaking rains over a wide area of Central Australia in the Alice Springs district, late in April, brought relief to parched stations. However, the rain belt which extended to parts of drought-stricken Victoria River Downs country to the north will bring death to many bogged-down weak and sick cattle being moved slowly across the sparsely grassed stock routes in an effort to save the herds.

New South Wales - The southern pastoral areas of the State are in good condition but rain is urgently needed in some of the northern districts to provide winter feed. The good condition of stock is the most satisfactory feature of the position throughout the State. The fodder conservation program encouraged by the State Department of Agriculture over the past few years has resulted in most graziers having plenty of dry supplementary feed on hand and has proved the value of the campaign.

Victoria - Despite declining temperatures feed is making good growth all over Victoria where the winter should be one of the best for years. Except for a few areas in the northern part of the State, good rains have been falling all over Victoria, allowing wheat seeding to be almost completed, and improving pastures.

South Australia - Following a relatively dry summer a splendid opening for the season commenced in mid-April with good steady soaking rains, followed by further similar rains weekly. Combined with calm weather and mild temperatures conditions have been perfect for the germination of seeds and development of plants. Pastures have made rapid development and prospects are excellent for lambing. There should be no shortage of feed during the winter months, and with such favourable conditions existing a large bulk of feed is assured prior to the winter period.

Western Australia - The agricultural districts in the south-west of Western Australia have benefited from rains in April, and conditions are fair to good in that area. In the Meekatharra district, 600 miles north of Perth, drought conditions prevail, and the situation is serious. Sheep are dying and costly hand feeding would be necessary to save the sheep that are left.

The Kimberleys have greatly benefited from heavy freak April rains coming after the normal "wet" season which usually ends in March. Although some belts of country were missed, in general the rains were widespread and pastoralists are facing the "dry" season with more confidence than for the past two seasons.

FRENCH SITUATION

The following account of the current crop situation in France has been extracted from a report provided by Miss V. F. Wightman, Commercial Secretariat, Canadian Embassy, Paris, under date of May 17, and is reproduced with the permission of the Trade Commissioner Service, Department of Trade and Commerce. Where possible, conversions from French to Canadian measures have been made and rounded for the convenience of our readers. Currency conversions have been made at the rate of one franc equals .00282 Canadian dollars, the rate in effect on April 30, 1954.

Weather Conditions According to the Ministry of Agriculture May 1st crop report, the month of April was marked by dry weather and below average temperatures. In the northern half of the country, where grain production is centered, rainfall totalled only 3 to 4 mm.; frosts were registered in isolated areas. As a result, growth has been slowed down, but save for oats, grain fields have withstood the lack of rain and to date show little yellowing. At May 1st, the area sown to all grains was 250,000 hectares (615,000 acres) above a year ago.

Wheat The area to wheat at May 1st at 4,416,000 hectares (10,900,000 acres) is 7 per cent above the same date last year and 3.5 per cent above 1952; 138,000 (339,000 acres) of this is Spring wheat. While there has been a considerable expansion in most parts of the country, it is noted that the principal wheat growing départements of the Nord, Pas-de-Calais, Somme and Aisne show a small reduction. The condition of the fields remains satisfactory although, at the time of writing, some yellowing had developed from lack of rain. Likewise, germination of the spring wheat has been delayed by the dry weather.

The area planted to both winter and spring grains as of May 1st, is shown below:

May 1 - Acreage Estimates - France

Grain	May 1, 1952	May 1, 1953	May 1, 1954
- thousand acres -			
Wheat	10,521	10,148	10,864
Wheat and Rye	64	59	54
Rye	1,117	1,023	1,023
Barley	2,546	2,841	2,983
Oats	5,410	5,530	5,336
Mixed grains	199	231	229

Source: Ministry of Agriculture.

Deliveries Farmers marketings continue at an accelerated pace as the following
by Farmers table indicates:

Grain	To April 1, 1953	To April 1, 1954
- thousand bushels -		
Soft wheat	198,230	225,734
Hard wheat	137	335
Rye	1,874	1,951
Barley	18,488	26,548
Oats	14,078	14,868

Source: Ministry of Agriculture.

Revised At a recent meeting of the Wheat Producers Association a statement
Disposition was made which revises earlier estimates of the disposition of the
of Crop 1953 wheat crop; in the absence of official statements, this may be regarded as the most authoritative information available. The revision has resulted from heavier wheat marketings by farmers which on April 1st totalled 6,152,500 (226,066,000 bushels) and which are expected to reach 6,300,000 metric tons (231,485,000 bushels) by the end of the current crop year.

Revised Disposition of 1953 Wheat Crop
(unofficial calculation)

Metric Tons		
<u>Availabilities</u>		
Carryover August 1, 1953	570,000	
Deliveries by farmers:		
Wheat	6,300,000	
Rye and Breadbeans	30,000	6,900,000
<u>Disposition</u>		
Domestic Consumption	5,100,000	
Exports to French Union	300,000	5,400,000
<u>Available for Export or Carryover</u>		1,500,000
Required stock	500,000	
For export or carryover	1,000,000	

Source: Statistics from Wheat Producers Association.

So far, indications have been that France would export 100,000 tons (25,721,000 bushels) this season which, on the basis of the foregoing table, would leave a carryover at August 1st of 800,000 tons (29,395,000 bushels) (about 500,000 tons (18,372,000 bushels) left the country from the beginning of the crop year, August 1st to March 31st). However, considering the increased wheat sowings and the good prospects for the new crop, the government may decide to dispose of further quantities. Since each quintal exported involves a loss of around 2,000 francs (\$1.53 per bushel) additional exports would require Treasury assistance. In view of the larger surplus which has emerged from the 1953 crop, the export subsidy fund provided by levies on farmers marketings is not adequate to cover the difference between French and foreign prices.

Arrangements for Surplus Coarse Grains On May 1st the French Grain Board advised cooperatives and merchants of its willingness to take over stocks of coarse grains of the 1953 crop which they had not been able to dispose of. Prices paid by the Board will be those announced last August plus a markup of 150 francs (42 cents) per quintal, which provides a type of floor price; dealers are asked to inform the Board as to the quantity and location of grain which they wish to sell, the minimum quantity being 150 quintals. The following prices apply.

Coarse Grains	Support Price	Markup	Total
- \$ per bushel -			
Barley	1.47	.10	1.57
Rye	1.93	.11	2.04
Oats91	.07	.98

Source: French Grain Board.

Integration of French and Tunisian Markets By decree of April 29th the French government established a common grain market for France and Tunisia for the period August 1, 1954 to July 31st 1958. Grain prices in Tunisia have heretofore been established by the government through the Tunisian office of the Grain Board but henceforth they are guaranteed at the same rate as in France allowing for differences in quality.

The French Grain Board will control movement of grain between France and Tunisia and will take over any surplus of soft wheat, durum wheat, barley or by-products; they will likewise be responsible for covering any deficits which may arise. Since with the new crop year French barley prices are free within the country save for the support price, Tunisian barley will be guaranteed at 60 per cent of the price for soft wheat, for a weight of 58.5 to 58.999 kilograms per hectolitre (46.8 to 47.2 pounds per bushel). In order to assure French producers that they will not have to support any loss on Tunisian grain through the levy to offset export losses, it is specified that any supplementary charges will be borne by the Treasury.

CALENDAR OF WHEAT EVENTS

- May 1 Trade sources reported that the port of Montreal had the earliest opening of navigation in the history of the harbour with the docking on March 30 of the "Manchester Spinner".
- 10 The United States winter wheat crop, based on conditions at May 1, was forecast at 707 million bushels, 29 million bushels more than the April 1 forecast. A crop of this size would be 19 per cent smaller than the 1953 crop of 878 million bushels and 15 per cent below the ten-year (1943-1952) average of 833 million bushels.
- 15 According to a report received from the Canadian Agricultural Secretary at Buenos Aires, the Argentine Minister of Foreign Trade has announced that the official price to producers for wheat for the 1954-55 crop year will remain at \$2.72 per bushel, the same as for 1953-54.
- 17 The area sown to wheat in France as of May 1 was placed at 10.9 million acres, 7 per cent above the acreage seeded at May 1, 1953 and 3.5 per cent above that of 1952.
- 18 According to the April, 1954 issue of the "Statistical Summary of the Australian Wheat Industry," published by the Commonwealth Bureau of Census and Statistics, the 1953-54 wheat production of 199 million bushels is 9.6 per cent less than the record 1947-48 harvest, but is 1.9 per cent greater than in 1952-53 and 30 per cent greater than the average production for the five years ended 1938-39. The average yield in 1953-54, of 18.6 bushels, is second only to the record 19.1 bushels per acre of 1952-53.
- 19 On the basis of farmers intentions at April 30, the indicated area of all wheat in Canada in 1954 is 24.6 million acres, a decrease of 3.6 per cent from last year's 25.5 million. The acreage intended for spring wheat is placed at 23.9 million but adverse seeding conditions in many areas of the Prairie Provinces may result in fairly substantial changes from original seeding intentions. Ontario farmers seeded an estimated 681,000 acres to winter wheat last fall. Winter-killing of Ontario winter wheat was estimated at 4 per cent of the area seeded in the fall of 1953, as compared with an estimated 6 per cent of the area seeded in the fall of 1952.
- 19 A new contract lowering rates on all grain shipments has been completed by the Canadian Wheat Board and Great Lakes shipping operators. The rate on wheat from the Lakehead to Montreal is 14 1/2 cents per bushel, as against 16 cents last year while charges on wheat from the Lakehead to Georgian Bay ports are 4 1/2 cents compared with 5 1/2 cents a year ago.
- 25 According to Broomhall, cool, wet weather prevails in Italy. Private estimates of the wheat outturn are being maintained at about 294.0 million bushels compared with the 1953 crop of 332.6 million.



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