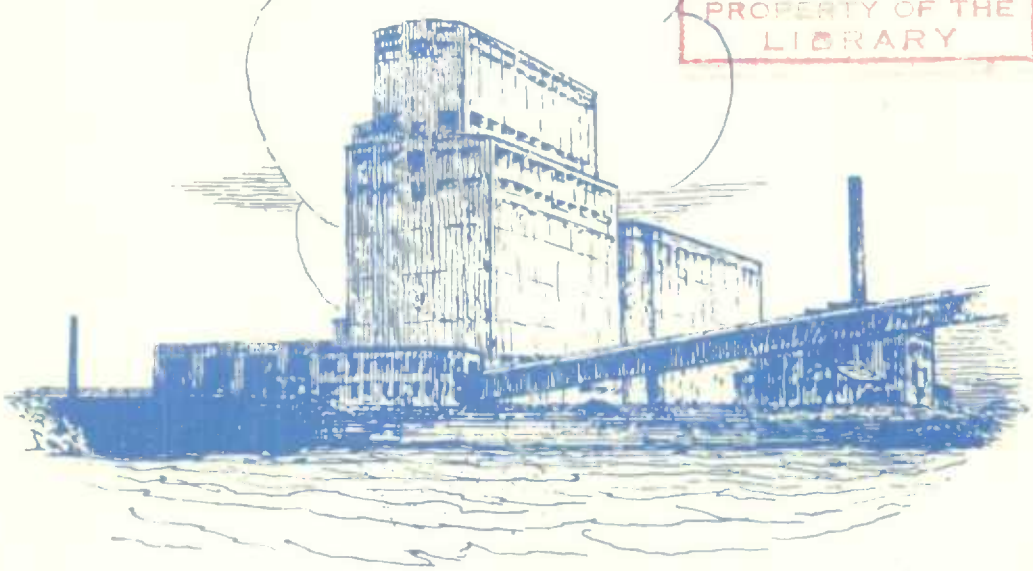
22-005
v. 24
no. 8
Mar. 1954
c. 2

DOES NOT CIRCULATE
NE PAS PRETER

CANADA
DOMINION BUREAU OF STATISTICS
AGRICULTURE DIVISION

THE WHEAT REVIEW

DOMINION BUREAU
OF STATISTICS
APR 14 1954
PROPERTY OF THE
LIBRARY



MARCH, 1954

EDMOND CLOUTIER, C.M.G., O.A., D.S.P.
QUEEN'S PRINTER AND CONTROLLER OF STATIONERY
OTTAWA, 1954

DOMINION BUREAU OF STATISTICS
Department of Trade and Commerce

THE WHEAT REVIEW

MARCH, 1954

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.

5502-502
7-4-54

Price $2 per year

Vol. 24 No. 8

TABLE OF CONTENTS

	Page
World Wheat Situation	
Current Supplies	1
World Breadgrain Production Revised Upward	1
Meeting of Joint United States—Canadian Committee on Trade and Economic Affairs	1
I.W.A. Sales and Purchases, Crop Year 1953-54	2
Canadian Situation	
Canada's Position in the European Grain Market	3
Quota Position and Delivery Outlook	8
What Farmers Say About Acadia Wheat	9
Supply Position	10
Farmers' Marketings	12
Visible Supply of Canadian Wheat	13
Grading of Wheat Inspected, August—February, 1953-54 with Comparisons	13
Weekly Visible Supply and Farmers' Marketings (Charts)	14
Wheat Shipments to the United States by Destination	15
Rail Shipments of Wheat to Maritime Ports	15
Rail Shipments of Wheat from Fort William-Port Arthur	16
Freight Assistance Shipments	17
Monthly Export Clearances	18
Exports of Canadian Wheat and Wheat Flour by Destination, 1953-54	19
Canadian Wheat Board Weekly Average Cash Wheat Prices	21
Canadian Flour Milling Situation	
Production and Exports	23
United States Situation	
Supply Position	24
Prospective Plantings of Spring Wheat	25
Crop and Weather Conditions	26
CCC to Sell Spain 10,000,000 Bushels Wheat	26
Cash Wheat Prices on the Kansas City and Minneapolis Markets	27
Chicago Wheat Futures, High Points of Closing	27
Argentine Situation	28
Uruguayan Grain Estimates, 1953-54	32
Australian Situation	32
French Situation	34
Italian Situation	38
Notes on New Crops	38
Calendar of Wheat Events	39

WORLD WHEAT SITUATION

Current Supplies — Latest available estimates indicate that supplies of wheat remaining on or about March 1, 1954 in the four major exporting countries for export and for carryover at the end of their respective crop years amounted to 1,869.9 million bushels, some 27.1 per cent greater than the 1,471.6 million available a year ago. Supplies at March 1, 1954 (in millions of bushels) were held as follows, with last year's figures in brackets: United States, 906.7 (654.4); Canada, 671.2 (546.9); Argentina, 147.7 (151.6), and Australia, 144.3 (118.7). Estimates for both years include on-farm stocks as well as those in commercial positions.

World Breadgrain Production Revised Upward — World breadgrain production in 1953 was about 258 million short tons, according to the latest data provided by the Foreign Agricultural Service of the United States Department of Agriculture. This total for wheat and rye is about three million tons above the previous estimate, bringing the 1953 world total within six million tons, or 2 per cent, of the all-time record outturn last season.

"Revisions from previous estimates of the 1953 wheat crop account for the increase, with no significant change in rye estimates. Improvement in conditions during the latter part of the growing season in the principal producing Southern Hemisphere countries, Argentina and Australia, and upward revisions for some Asiatic countries were the principal features of the increase over the earlier estimate.

The increase brings the estimate of 1953 world wheat production to 7,150 million bushels, 105 million bushels more than the previous estimate. This is 145 million bushels less than last year's record harvest, with North America the principal area of reduction. The decline there and in South America offset increases in a number of other areas. World rye production for 1953 is estimated at 1,540 million bushels, 60 million bushels less than in 1952 and about 190 million bushels below the prewar (1935-39) average."

Meeting of Joint United States—Canadian Committee on Trade and Economic Affairs — The first meeting of the Joint United States—Canadian Committee on Trade and Economic Affairs was held in Washington on the 16th of March, each country being represented on the Committee by four Cabinet Ministers. The purpose of the meeting was to provide an opportunity for United States and Canadian Ministers to examine the trade and economic problems common to both countries. The following extract from the joint communique issued on March 17 expresses the views of the Committee relative to certain agricultural marketing problems:

" .... It was agreed that it is essential that pressing, but possibly temporary, economic problems should not be solved by expedients which might make more difficult the advance on a broad front that was held to be necessary. One immediate problem which received close consideration was that raised by the accumulation of large agricultural surpluses. Special incentives and favourable weather conditions have operated in varying degrees to enlarge these surpluses. (continued on page 12)

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	9,726	-	-	1,122	10,848	13,035
Bolivia	4,042	695	-	-	324	1,019	3,023
Brazil	13,228	3,733	-	-	-	3,733	9,495
Ceylon 4/	10,288	763	9,525	-	-	10,288	-
Costa Rica	1,286	488	-	-	582	1,070	216
Cuba	7,422	1,158	-	-	2,664	3,822	3,600
Denmark	1,837	-	-	-	-	-	1,837
Dominican Republic .	955	236	-	-	291	527	428
Ecuador	2,388	901	-	-	427	1,328	1,060
Egypt	14,697	-	-	-	1,888	1,888	12,809
El Salvador	735	198	-	-	469	667	68
Germany	55,116	8,856	1,889	-	13,177	23,922	31,194
Greece	12,860	-	-	-	2,296	2,296	10,564
Guatemala	1,286	135	-	-	610	745	541
Haiti	1,837	431	-	-	714	1,145	692
Honduras Republic ..	551	67	-	-	362	429	122
Iceland	404	148	-	-	85	233	171
India	36,744	-	345	-	-	345	36,399
Indonesia	6,246	5	2,802	-	511	3,318	2,928
Ireland	10,105	1,551	653	-	-	2,204	7,901
Israel	8,267	2,949	-	-	-	2,949	5,318
Italy	31,232	-	-	-	-	-	31,232
Japan	36,744	11,670	-	-	24,829	36,499	245
Jordan	2,940	-	-	-	-	-	2,940
Korea	1,470	-	-	-	-	-	1,470
Lebanon	2,756	-	-	-	21	21	2,735
Liberia	73	23	-	-	9	32	41
Mexico	14,697	-	-	-	2,571	2,571	12,126
Netherlands	24,802	4,916	-	-	8,352	13,268	11,534
New Zealand	5,879	-	3,756	-	-	3,756	2,123
Nicaragua	367	121	-	-	211	332	35
Norway	8,451	2,240	-	-	2,488	4,728	3,723
Panama	735	290	-	-	273	563	172
Peru	7,349	110	-	-	588	698	6,651
Philippines	8,672	3,201	4	-	2,200	5,405	3,267
Portugal	7,349	731	370	-	2,311	3,412	3,937
Saudi Arabia	2,572	-	-	-	1,403	1,403	1,169
Spain 4/	9,186	-	-	-	9,322	9,322	-
Sweden	919	-	-	-	-	-	919
Switzerland	7,900	6,796	-	-	-	6,796	1,104
Union of South Africa	13,228	5,600	-	-	2,053	7,653	5,575
Vatican City 4/	551	-	-	-	551	551	-
Venezuela	6,247	2,911	-	-	1,905	4,816	1,431
Yugoslavia	3,674	-	-	-	2,256	2,256	1,418
Totals	421,156	70,649	19,344	-	86,865	176,858	
Guaranteed Quantities (Exporting Countries)		163,231	48,000	367	209,558	421,156	
Balance		92,582	28,656	367	122,693	244,298	

1/ Canadian Sales through March 23, 1954.

2/ Sales recorded by International Wheat Council through March 19, 1954.

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

4/ Quota filled.

CANADIAN SITUATION

The editors of The Wheat Review are pleased to publish the following article by Dr. C.F. Wilson, Agricultural Counsellor, Canadian Embassy, Rome, Italy. Dr. Wilson served as Chief of the Agriculture Branch of the Dominion Bureau of Statistics during the early years of the war and from 1936 to 1943 was responsible for publication of The Wheat Review, then known as The Monthly Review of the Wheat Situation. Prior to his appointment to Rome in 1952, Dr. Wilson was Chief of the Wheat and Grain Division of the Department of Trade and Commerce.

Canada's Position in the European Grain Market

by

C. F. Wilson

"In the autumn of 1950 a Canadian Grain Mission visited the United Kingdom and several western European countries in the interest of developing wheat, grain and flour sales in that area. The report of the Mission* noted that the United Kingdom continues to be the largest single market for wheat but pointed out some significant shifts which had taken place up to that time in the relative importance of the United Kingdom and Western European markets. The purpose of this article is to bring these observations up to date.

In the Grain Missions's report it was shown that United Kingdom wheat and flour import requirements had declined in absolute amount from the pre-war period, but that Canada had enjoyed an increased share of that market. In Western Europe, however, import requirements for wheat and flour were much greater than they had been pre-war, although Canada's share of this market had declined slightly in absolute quantity and to a greater extent as a percentage of the market. The report also noted that a substantial market in coarse grains continued to exist in the United Kingdom and Western Europe but of which Canada was obtaining a negligible share.

The data are now available for the three full crop years which have elapsed since the grain Mission report was prepared, and the figures for these years are reproduced here together with the data for the earlier years in tables similar to those which were published in the report. Table I shows that in the past three crop years, total exports of wheat and flour from all sources to the United Kingdom continued to fall substantially below their pre-war levels. Moreover, Canada's percentage share of the United Kingdom market, has been reduced somewhat from its high level in the early post-war years. Nevertheless, Canada's share has held at about 70 per cent of the total market which is a considerable improvement on the 52.5 per cent maintained in the 1934-38 period. Although United States aid was not an important factor in diverting United Kingdom purchases to the United States in the post-war period, that country has been enjoying about 11 per cent of the United Kingdom market as compared with 3 per cent in the pre-war period. Both Canada and the United States have enjoyed increased shares at the expense of Argentina, Australia and "other" suppliers. With the exception of Australia the the other sources have not been able to maintain continuity of supplies for the

*See Report of the Canadian Grain Mission, March, 1951, Queen's Printer, Ottawa.

United Kingdom. Although the U.S.S.R. supplied the United Kingdom with 12.7 million bushels of wheat in the 1951-52 crop year, this source has not offered wheat to the United Kingdom in subsequent years.

Table I

Wheat and Flour Exports to the United Kingdom

	Argentina	Australia	Canada	U.S.A.	Other	Total
			- million bushels -			
Calendar Year						
Average 1934-38	30.5	52.1	118.2	7.0	17.2	225.0
July-June						
1947-48	9.5	21.0	163.9	4.3	-	198.7
1948-49	-	46.3	156.3	9.6	2.2	214.4
1949-50	-	10.0	137.8	17.2	2.4	167.4
1950-51	1.7	25.5	96.1	36.5	2.3	162.1
1951-52	0.1	22.5	127.5	20.5	12.7	183.3
1952-53	-	28.5	117.9	19.2	0.9	166.5
			- per cent -			
Calendar Year						
Average 1934-38	13.6	23.2	52.5	3.1	7.6	100.0
July-June						
1947-48	4.8	10.5	82.5	2.2	-	100.0
1948-49	-	21.6	72.9	4.5	1.0	100.0
1949-50	-	6.0	82.3	10.3	1.4	100.0
1950-51	1.0	15.8	59.3	22.5	1.4	100.0
1951-52	-	12.3	69.3	11.2	6.9	100.0
1952-53	-	17.1	70.8	11.5	0.6	100.0

Table II shows wheat and flour exports to the Western European countries exclusive of the United Kingdom. The very high totals of imports in the years immediately following the war settled down to a level of about 345 million bushels over the past three crop years. The combined Western European market is roughly twice as large as that of the United Kingdom. Whereas Canada enjoyed only a minor portion of this market in the post-war years up to 1950, Canada's shipments both in absolute amount and as a percentage of the market showed an appreciable gain during the last three crop years. Canada's share of this market which had amounted to 19.6 per cent in the pre-war period had become negligible in the early post-war period and had risen only to 10.2 per cent in 1949-50. From then it increased steadily until it reached 34.9 per cent in the 1952-53 crop year. United States aid reflected in the supply of American wheat and flour to Western European countries accounted for the very high proportion of this market which

the United States has enjoyed in the post-war years. In more recent years, United States aid has been progressively reduced, and with this reduction the buying agencies of the countries concerned have been able to return more closely to commercial considerations in their wheat and flour procurement.

Table II

Wheat and Flour Exports to Western Europe, Excluding the United Kingdom

	Argentina	Australia	Canada	U.S.A.	Other	Total
			- million bushels -			
Calendar Year						
Average 1934-38	47.2	12.8	31.2	17.7	50.3	159.2
July-June						
1947-48	64.3	12.4	21.8	342.4	14.7	455.6
1948-49	33.5	3.8	20.2	319.7	26.3	403.5
1949-50	28.9	8.6	29.2	177.5	42.5	286.7
1950-51	33.3	19.1	46.1	185.6	64.2	348.3
1951-52	3.7	20.3	94.1	178.2	50.6	346.9
1952-53	8.4	11.0	120.3	133.2	71.0	343.9
			- per cent -			
Calendar Year						
Average 1934-38	29.7	8.0	19.6	11.1	31.6	100.0
July-June						
1947-48	14.1	2.7	4.8	75.2	3.2	100.0
1948-49	8.3	1.0	5.0	79.2	6.5	100.0
1949-50	10.1	3.0	10.2	61.9	14.8	100.0
1950-51	9.6	5.5	13.2	53.3	18.4	100.0
1951-52	1.1	5.8	27.1	51.3	14.7	100.0
1952-53	2.4	3.2	34.9	38.8	20.7	100.0

Table III sets out the coarse grains position in the United Kingdom. Although Argentine corn played a predominant role during the pre-war period in the United Kingdom coarse grains market, this has largely been replaced by oats and barley imports from the U.S.S.R. The United States has shared in this replacement, however, by finding a demand for its corn in the United Kingdom. The significance to Canada of this shift, of course, is in the demonstration of the ability to substitute one coarse grain for another because Canada has oats and barley to offer in markets that are normally dominated by corn. Within the past two crop years Canada's exports of barley to the United Kingdom have shown an upturn but they have not yet come up to the pre-war level.

Table III

Exports of Coarse Grains and Products to the United Kingdom

	Argentina	Australia	Canada	U.S.A.	Others	Total
			- 1,000 metric tons -			
Calendar Year						
Average 1934-38 ..	2,596.1	49.5	269.5	294.0	352.1	3,561.2
July-June						
1947-48	1,200.5	155.7	22.1	70.1	460.8	1,909.2
1948-49	1,176.7	222.0	9.4	53.6	502.0	1,962.7
1949-50	282.3	1/	10.6	196.9	1,382.2	1,872.0
1950-51	69.5	1/	1.5	551.9	1,416.3	2,039.2
1951-52	25.9	1/	180.5	850.0	1,753.8	2,810.2
1952-53	282.6	292.2	242.0	620.7	1,147.0	2,584.5
			- per cent -			
Calendar Year						
Average 1934-38 ..	72.9	1.3	7.6	8.3	9.9	100.0
July-June						
1947-48	62.8	8.1	1.1	3.6	24.4	100.0
1948-49	59.9	11.3	0.5	2.7	25.6	100.0
1949-50.....	15.2	1/	0.6	10.4	73.8	100.0
1950-51	3.4	1/	0.1	27.3	69.2	100.0
1951-52	0.9	1/	6.5	30.2	62.4	100.0
1952-53	10.9	9.3	9.4	24.1	46.3	100.0

1/ Included under "Others".

Table IV shows a somewhat different position for Canada's exports of coarse grains to the Western European market. Here too, Argentina was the main pre-war supplier, but yielded to the United States, the U.S.S.R. and Near East suppliers in the post-war period. Whereas Canada had only a negligible share of this market in the pre-war period, its share was built up to 22.6 per cent of the total in the 1952-53 crop year. Canadian shipments in the past two crop years have consisted mainly of barley to Western Germany, Belgium and the Netherlands.

Table IV

Exports of Coarse Grain and Products to Western Europe, Excluding the United Kingdom

	Argentina	Australia	Canada	U.S.A.	Others	Total
			- 1,000 metric tons -			
Calendar Year						
Average 1934-38 ..	3,704.6	14.1	43.5	334.9	1,640.1	5,737.0
July-June						
1947-48	1,504.3	188.7	351.1	898.1	1,092.4	4,034.6
1948-49	922.8	150.0	364.3	2,261.6	1,290.7	5,024.4
1949-50	1,278.6	1/	90.5	2,793.6	2,374.7	6,537.4
1950-51	336.0	1/	268.1	2,908.2	1,881.8	5,394.1
1951-52	921.6	1/	808.4	2,039.3	2,867.8	6,637.1
1952-53	538.8	163.8	1,366.3	2,031.6	1,923.6	6,024.1
			- per cent -			
Calendar Year						
Average 1934-38 ..	64.5	0.3	0.8	5.8	28.6	100.0
July-June						
1947-48	37.3	4.7	8.7	22.2	27.1	100.0
1948-49	18.4	3.7	7.2	45.0	25.7	100.0
1949-50	19.2	1/	1.4	42.9	36.5	100.0
1950-51	6.2	1/	5.0	53.9	34.9	100.0
1951-52	13.9	1/	12.3	30.6	43.2	100.0
1952-53	9.0	2.7	22.6	33.7	32.0	100.0

1/Included under "Others".
Source of data in Tables I to IV: FAO grain statistical bulletins.

In summarizing Canada's progress in the United Kingdom and Western European grain markets since 1950 it has been indicated that the Canadian position has been reasonably maintained in the United Kigdom wheat and flour market, considering the exceptionally high proportion of that market Canada supplied in the early post-war years. In Western Europe where the Grain Mission particularly concentrated its attention an encouraging gain in wheat sales has been accomplished over the past three years.

As for the coarse grains, Canadian sales have increased both to the United Kingdom and Western Europe. It should be noted however, that barley made up the bulk of these coarse grains sales. Tables III and IV show tht extent of the total European market for coarse grains of all kinds, and because of the possibilities of substituting one grain for another when prices are attractive and exchange considerations permit, there remains a prospect for continuing to expand sales of Canadian coarse grains in the European market.

The Grain Mission report dwelt upon two main factors, not unrelated, which were expected to limit Canadian development of the Eurupean market. The first was the supply of European grain and flour requirements under United States

aid programmes and the second was lack of exchange convertibility. In the past three years the role of United States aid has diminished and this, more than any other single factor, has accounted for the increase in Canadian sales as a result of the approach toward commercial conditions in which buyers are able to exercise freedom of choice. On the other hand although considerable progress has been made toward exchange convertibility, its lack of attainment has continued to be a limiting factor on Canadian progress in the European market. Its influence would probably have been felt more strongly had there been more supplies offering from Argentina, the U.S.S.R. and the Danube Basin.

Within the past year a third consideration has developed in the substantial increase in the domestic production of grains in Western Europe. As a result of last year's good harvest total imports of wheat and other grains into Western Europe during the present crop year will be considerably reduced from the amounts imported over the past three crop years. In this situation Canada would do well to maintain her relative share of the Western European market attained in the past few years. ...."

- - - -

Quota Position and Delivery Outlook

On March 30, Mr. J. G. Diefenbaker asked the following question in the House of Commons: ".... what are the prospects for Canada's wheat surplus being disposed of during the present year and to what degree the wheat on farms in the western provinces may be expected to be sold or disposed of in the elevators before this year's crop is harvested?"

In reply to this question the Right Hon. C. D. Howe, Minister of Trade and Commerce said in part " .... In dealing with this question I should first of all like to refer to the delivery position so far in the crop year. From August 1, 1953 to March 17, 1954, producers' deliveries of grain in the Prairie Provinces amounted to 403 million bushels. If allowance is made for delivery since March 17, the actual delivery figure now stands at approximately 410 million bushels. At the present time the general quota is five bushels per specified acre. In addition, there have been substantial special authorizations for the delivery of barley suitable for malting, and there is a supplementary oats quota of 12 bushels per seeded acre. Recently delivery quotas have been raised above the five bushels per specified acre level at a number of individual points.

With the excellent movement of grain from the Pacific coast ports this year, the five bushel quota has generally been provided for in the province of Alberta. In Saskatchewan, and to a lesser extent in Manitoba, additional shipments are required before the general five bushel quota can be implemented The Wheat Board is acutely conscious of this problem and is working on a shipping policy designed to relieve congested points in Manitoba and Saskatchewan just as soon as physically possible. I might add, however, that there is one difficulty which cannot be underestimated. With only limited storage space throughout Canada, it is essential that only kinds of grain and grades of grain which are in demand can be moved to forward positions and this factor has and will continue to slow down the movement of grain from many areas in Manitoba and Saskatchewan. For example, the Board has ample stocks of No. 2 Northern wheat in eastern positions at the present time and any No. 2 Northern wheat which is moved forward to terminal points must, for the time being at least, be treated as grain for storage. I might

add that this problem is receiving continuous attention of the Board.

Since the turn of the year space has been appearing at some delivery points, particularly in Alberta. In order to make use of this space, the Board commenced on March 17 to increase delivery quotas beyond the five bushel level. The increases have been in terms of either one or two bushels per specified acre dependent upon space available at the delivery points concerned. As soon as the quotas are increased above the five bushel level at individual points, these stations are cut off from further shipments except for shipments specially authorizied by the Board. This will have the effect of increasing car supply to areas of greatest need. At the present time delivery quotas have been increased above the five bushel level at slightly over 200 delivery points.

The question before us requests an estimate of delivery prospects for the balance of the crop year. This is a very difficult type of estimate to make because the quantity of grain which producers will be able to market in the Prairie Provinces between now and the end of the crop year depends almost entirely upon the volume of domestic and export sales, and generally the buying of grain today is on a hand to mouth basis. Therefore the delivery possibilities for the balance of the crop year will depend to a large extent upon day to day selling on the part of the Wheat Board. We know of course that there are quantities of grain which will leave Canada shortly after the opening of navigation. We have confidence that there will be worth-while buying of Canadian grain over the period of the next four months.

I would hazard a guess that in the crop year 1953-54 producers in the Prairie Provinces will market somewhere around 600 million bushels of grain which will be well above normal marketings based upon normal crops. If we attain this figure of marketing in 1953-54, the total volume of grain marketed from the bumper crops of 1951, 1952 and 1953 will amouht to nearly 2,200 million bushels. This is a very large record of marketings over a period of thirty-six months."

What Farmers Say About Acadia Wheat

The following press release was issued on February 16 by the Canada Department of Agriculture, Information Service: "The introduction of new cereal variety always arouses the interest of the farming public. During the winter of 1952-53, the Experimental Farms in Eastern Canada distributed in two bushel lots some 750 bushels of a new hard red spring wheat, called Acadia to farmers in the Maritime Provinces, Quebec and Ontario.

In order to find out how the new wheat performed in the growing season of 1953, and what the farmers in the various areas thought of Acadia, a simple questionnaire form was sent to all who had purchased seed last winter. Over 60 per cent of these questionnaires have been returned to date and it is now possible from a study of the information obtained to provide a fairly reliable report on both these points.

From the standpoint of yield most farmers claimed that they were well satisfied. Yields in the Maritime Provinces ranged from 12 to 45 bushels per acre, while in Quebec and Ontario yields varied from 6 to 50 bushels per acre.

Some interesting results were obtained in New Brunswick where farmers are finding it an advantage to grow wheat on potato land instead of oats because the latter crop so frequently lodges on heavily fertilized potato land.

The average yield for Acadia in New Brunswick was 28.4 bushels per acre with a slightly higher average for Victoria County.

Acadia wheat appears to have done best on clay and clay loams, although an odd high yield was obtained on very fertile sandy and gravelly soils.

The majority of those reporting stated that they were impressed with the general appearance of Acadia wheat in the field and their comments ranged "good" to "excllent" for this character.

Arrangements have been made to supply Acadia wheat to those who were so unfortunate as not to have secured seed in 1953. A list of those with Acadia seed for sale has been prepared and anyone desiring seed should write to the nearest Experimental Farm in his province and secure this list. The prices range from $3.00 to $3.75 per bushel in 2 bushel bags, depending on grade and quality.

Mr. J.G.C. Fraser, Chief Assistant of the Cereal Crops Division, Central Experimental Farm at Ottawa, states that it would be advisable to write at once to secure this list in order to avoid disappointment in procuring Acadia wheat for 1954 seeding. The Experimental Stations are located at Charlottetown, P.E.I., Nappan, N.S., Fredericton, N.B., Caplan, Ste. Anne de la Pocatiere, Lennoxville, L'Assomption in Quebec and the Cereal Division, Ottawa."

Supply Position Due to an upward revision of some 6.4 million bushels in July 31, 1953 carryover stocks, total estimated supplies of wheat in Canada for 1953-54, now stand at 983.2 million bushels, compared with the 1952-53 total of 905.1 million. With domestic requirements placed at 160.0 million bushels, some 823.2 million bushels 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—February period of the 1953-54 crop year, amounted to 152.0 million bushels as against 207.8 million for the same period of 1952-53. The balance available at March 1 for export and for carryover during the current crop year, at 671.2 million bushels, exceeded by some 124.3 million the total of 546.9 million bushels at March 1, 1953.

Weekly marketings of wheat by Western Canadian farmers were at the two to three million bushel level during the four-week period ended March 17, 1954. The total visible supply of Canadian wheat, meanwhile, showed a decline for the second consecutive month, decreasing from 368.2 million bushels at February 17 to 362.8 million at March 17. Comparable totals of Canadian wheat in visible positions at about mid-March in 1953 and 1952 amounted to 274.7 million and 212.6 million bushels, respectively. Stocks in country elevators accounted for 198.5 million bushels or 55 per cent of the total visible supplies as against stocks of 145.4 million a year ago and 95.6 million two years ago. Some 12.1 million bushels were in store at Vancouver-New Westminster at March 17, 1954, compared with 6.4 million at approximately the same date in 1953 and 10.1 million in 1952. Lakehead stocks of wheat amounted to 54.7 million bushels, exceeding by a considerable margin stocks of 35.9 million and 41.2 million in the same position in 1953 and 1952, respectively. Stocks in Bay, Lake and Upper St. Lawrence ports amounted to 33.5 million bushels as against stocks of 19.4 million in 1953 and

12.6 million in 1952. The 19.2 million bushels in Lower St. Lawrence and Maritime ports, were more than double those at approximately the same date in both 1953 and 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—January	2/	2/
Total estimated supplies	905.1	983.2
Less estimated domestic requirements for crop year	150.4 3/	160.0
Available for export and for carryover	754.7	823.2
Deduct:		
Overseas clearances of wheat as grain, Aug.—Feb.	158.2	122.3
Exports of Canadian wheat to U.S., Aug.—Feb.	17.4	4.1
Total exports of wheat	175.6	126.3
Exports of wheat flour in terms of wheat, August—February	32.2 4/	25.7
Total exports of wheat and wheat flour	207.8	152.0
Balance on March 1 for export and for carryover	546.9	671.2

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

Total exports of Canadian wheat and wheat flour in terms of wheat during February, 1954 amounted to 13.7 million bushels, down somewhat from both the preceding month and the corresponding month a year ago when shipments amounted to 17.8 million and 17.6 million bushels, respectively. The ten-year (1944—1953) average wheat and flour exports for February was 18.8 million bushels. Exports of wheat as grain during the seventh month of the current crop year totalled 10.6 million bushels compared with 13.8 million bushels for the month of January. Total exports of wheat as grain during the August—February period of the 1953-54 crop year amounted to 126.3 million bushels as against 175.6 million for the same period of 1952-53. The United Kingdom continued as the principal market for Canadian wheat, with the 42.1 million bushels shipped to that country representing 33 per cent of the total export movement of wheat as grain during the August—February period of 1953-54. Other major markets for Canadian wheat during the period, with quantities in millions of bushels, were as follows: Japan, 25.4; Federal Republic of Germany, 9.2; Belgium, 8.7; Switzerland, 6.0; The Netherlands, 5.0; India, 4.3; United States, 4.1 (of which 1.4 was for milling in bond); Spain, 3.4; Union of South Africa, 3.3; Israel, 2.6; Norway, 1.8; Ireland 1.8; Peru 1.1 and Malta 1.1. (continued on page 38)

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	86,511	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
Totals	25,898,324	157,336,672	77,965,624	261,200,620	336,285,255

*Revised.

Meeting of Joint United States—Canadian Committee on Trade and Economic Affairs (con't. from p. 1)

The Ministers of both countries recognized that if surpluses were to be disposed of without regard to the impact on normal trade, great damage might be done not only to the commerce of Canada and the United States but also to the world economy. The Ministers reaffirmed that it is the continuing policy of their respective governments, in disposing of agricultural surpluses abroad, to consult with interested countries and not to interfere with normal commercial marketings. They stated that it is their settled intention that any extraordinary measures that might be adopted to reduce surpluses should result in greater consumption and should augment, and not displace, normal quantities of agricultural products entering into world trade. ...."

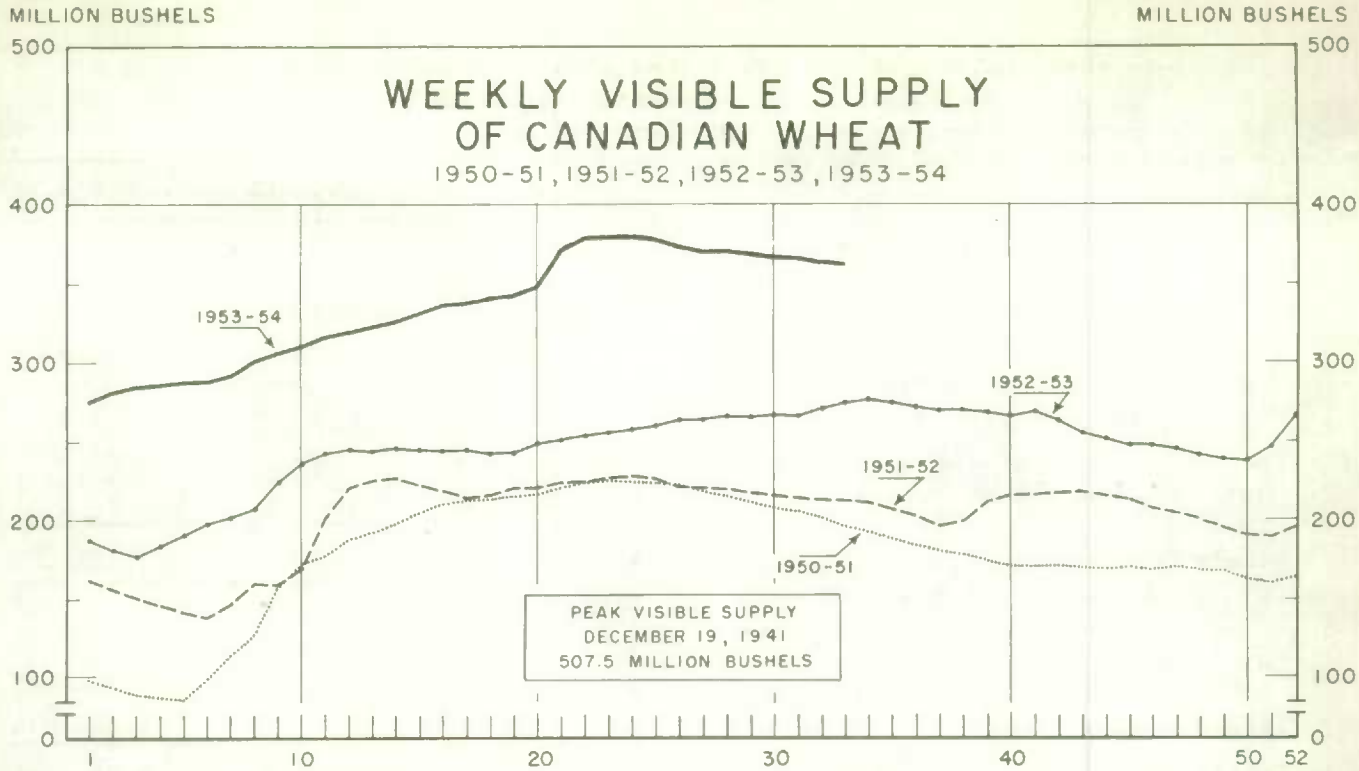
Visible Supply of Canadian Wheat, March 17, 1954, Compared with Approximately the same Date, 1952 and 1953

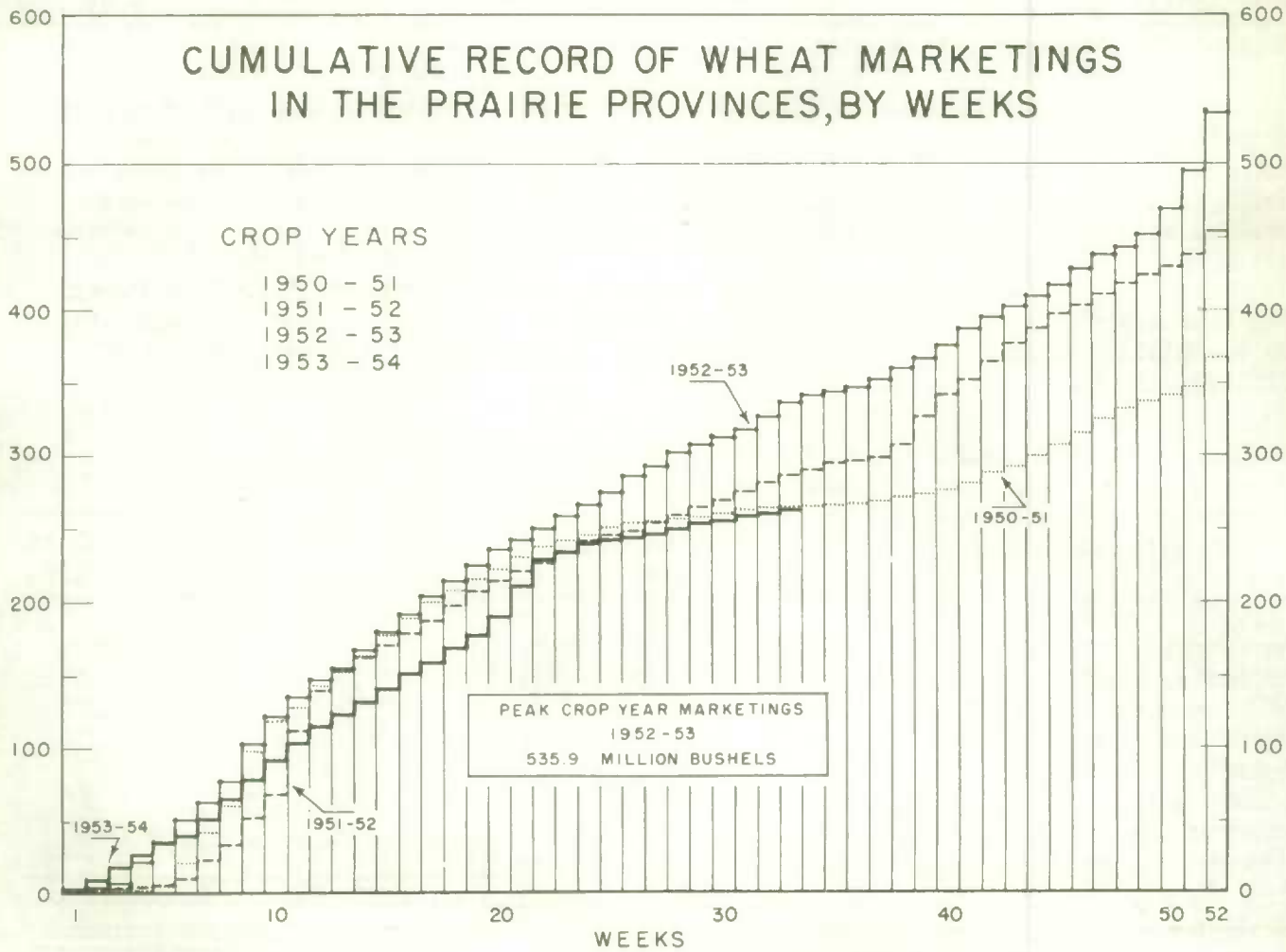
Position	1952	1953	1954
	- thousand bushels -		
Country elevators - Manitoba	8,442	9,301	23,201
Saskatchewan	57,658	86,230	117,125
Alberta	29,523	49,854	58,220
Totals	95,623	145,386	198,546
Interior private and mill	6,118	6,859	6,542
Interior terminals	10,893	13,534	14,912
Vancouver-New Westminster	10,120	6,392	12,088
Victoria	-	113	562
Prince Rupert	352	-	53
Churchill	1,997	2,048	2,516
Fort William-Port Arthur	41,172	35,889	54,674
Storage Afloat	-	1,186	196
In transit rail (Western Division)	15,722	21,832	7,818
Bay, Lake and Upper St. Lawrence ports	12,558	19,365	33,538
Lower St. Lawrence and Maritime ports	8,481	8,324	19,243
Storage Afloat	2,101	3,388	10,442
In transit rail (Eastern Division)	3,521	8,285	1,039
United States ports	3,820	1,740	609
In transit U.S.A.	150	322	-
Totals	212,627	274,663	362,778

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

Grade	Crop Year		August—February			
	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	10,968	7.0	11,149	9.1
2 Northern	29.9	31.7	41,847	26.7	52,242	42.7
3 Northern	13.7	17.4	29,174	18.6	24,504	20.0
4 Northern	6.0	9.6	18,063	11.5	7,047	5.8
5 Wheat	5.7	10.4	17,324	11.1	7,661	6.3
6 Wheat	3.3	2.8	6,183	3.9	1,504	1.2
Feed Wheat	0.6	0.4	983	0.6	179	0.1
Garnet	0.9	0.5	881	0.6	599	0.5
Amber Durum	3.2	1.7	3,586	2.3	3,574	2.9
Alberta Winter	0.5	0.1	226	0.1	156	0.1
Toughs 2/ 3/	18.4	16.7	24,783	15.8	11,688	9.5
Damps 2/ 4/	3.8	0.1	219	0.1	61	1/
Rejected 2/	0.6	1.0	1,554	1.0	1,419	1.2
All Others	1.1	0.4	701	0.4	605	0.5
Totals	100.0	100.0	156,541	100.0	122,388	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.





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

Wheat Shipments* to the United States by Destination
August 1, 1953 to March 17, 1954
Compared with Approximately the Same Period 1951-52 and 1952-53

Destination	1951-52	1952-53	1953-54
		- bushels -	
By Vessel			
Duluth-Superior	4,264,331	2,643,223	26,541
Milwaukee	298,326	-	15,940
Chicago	1,161,571	313,443	-
Huron	-	320,734	-
Erie	93,107	276,567	-
Buffalo	14,635,273	11,446,101	2,684,191
Oswego	514,005	1,102,391	-
Totals, Vessel	20,966,613	16,102,459	2,726,672
By Rail			
U.S.A. Seaboard Ports	1,903,416	602,908	16,534
Other U.S.A. Points	3,939,933	3,694,208	1,508,780
Totals, Rail	5,843,349	4,297,116	1,525,314
Totals, Shipments	26,809,962	20,399,575	4,251,986

*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 March 17, at 4.3 million bushels, were only slightly increased over those of a month ago. Shipments for the comparable periods of 1952-53 and 1951-52 amounted to 20.4 million and 26.8 million bushels, respectively.

Rail shipments of wheat to Maritime ports from Bay, Lake and Upper St. Lawrence Ports during the first seven months of the current crop year amounted to 5.4 million bushels as against 9.1 million shipped during the same period of 1952-53.

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

Origin of Shipments	August 1, 1952 to February 28, 1953	August 1, 1953 to February 28, 1954
	- bushels -	
Port McNicoll	3,097,409	1,940,997
Midland	4,590,991	2,524,547
Collingwood	120,996	155,120
Owen Sound	400,078	449,911
Goderich	-	240,278
Sarnia	461,284	-
Walkerville	-	45,082
Toronto	454,143	-
Totals	9,124,901	5,355,935

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	191,317
September	123,256	435,068	1,181,046	236,030
October	73,543	159,667	936,757	173,043
November	133,847	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	368,663
March	3,476,161	1,564,586	6,285,944	
April	1,196,236	107,061	189,339	
May	462,676	132,496	216,046	
June	356,443	196,083	136,014	
July	199,603	113,827	223,687	
Totals	15,359,216	14,303,297	26,594,524	

Rail shipments of wheat from the Lakehead during February 1954 at 368,663 bushels were down somewhat from those of the preceding month when shipments amounted to 510,486 bushels. It is noted that, during February 1953, rail movement of wheat from Fort William-Port Arthur reached its highest monthly level in recent years when shipments amounted to some 9.6 million bushels.

Distribution of the February 1954 rail shipments of wheat from the Lakehead, by grade and destination is shown in the table below. The bulk of the shipments, 222,119 bushels, went to destinations in Ontario, with Quebec accounting for an additional 80,666 bushels. Relatively smaller shipments went to New Brunswick and the United States. Some 36 per cent of the total shipments consisted of No. 1 and No. 2 Northern, all of which went to various points in Ontario and Quebec.

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

Grade	N.B.	Que.	Ont.	U.S.A.
		- bushels -		
1 Northern	-	3,500	20,500	-
2 Northern	-	40,500	66,680	-
3 Northern	-	2,000	4,976	-
4 Northern	-	2,000	14,000	-
5 Wheat	1,500	18,166	33,667	-
Amber Durum	-	3,500	-	-
All others	18,500	11,000	82,296	45,878
Totals	20,000	80,666	222,119	45,878

Freight Assistance Shipments — Claims filed for payment up to February 28, 1954, represent shipments of some 6.2 million bushels of wheat from the Prairie Provinces to Eastern Canada and British Columbia under the freight assistance plan during the first half of the 1953-54 crop year. During the same period of the 1952-53 crop year claims had been filed for some 7.6 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—January wheat shipments under the plan were running somewhat below those in 1952-53. Revised data on shipments during the first six months of 1952-53 based on claims submitted up to February 28, 1954, place the total at 8.2 million bushels. The bulk of this crop year's August—January 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	392	403	237	1,160
September	8	10	64	43	474	292	217	1,108
October	10	7	59	38	378	461	226	1,180
November	13	3	52	34	404	373	203	1,082
December	5	8	67	27	352	333	152	944
January, 1954	4	10	44	37	305	250	34	685
Totals 1/	45	61	347	221	2,307	2,111	1,068	6,160
Same period 1952-53:								
Preliminary 2/	50	116	410	278	2,844	2,827	1,091	7,616
Revised 1/.....	56	121	434	286	2,937	2,952	1,372	8,158

Preliminary data on millfeed shipments under the freight assistance plan indicate shipments of 207,014 tons during the August—January period of 1953-54. This total, based on claims filed up to February 28, 1954, will likely be subject to considerable upward revision with the filing of additional claims. An indication of the possible extent of the revision may be derived from the fact that by February 28, 1953, claims had been filed for only 247,868 tons out of a total of 275,495 tons shipped during the first six months of the 1952-53 crop year. As with freight-assisted wheat shipments, the bulk of the millfeed shipments during the period under review went to destinations in Ontario and Quebec

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

Province	August—January		
	1952-53		1953-54
	Preliminary 2/	Revised 1/	Preliminary 1/
		- tons -	
Newfoundland	1,788	2,032	1,729
Prince Edward Island	3,873	4,037	2,396
Nova Scotia	18,965	20,256	15,282
New Brunswick	17,433	18,194	14,343
Quebec	120,779	128,416	102,412
Ontario	66,906	77,109	50,817
British Columbia	18,124	25,451	20,035
Totals	247,868	275,495	207,014

1/ Based on claims filed up to February 28, 1954.

2/ Based on claims filed up to February 28, 1953.

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 -			
1951-52					
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
1952-53					
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
1953-54 5/					
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
Totals	122,258	4,066	25,704	152,028	168,184

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	November	February		August—February	
	Wheat Flour 1/2/	Wheat Flour 2/	Wheat 3/	Wheat Flour 2/	Wheat 3/
		- bushels -			
COMMONWEALTH COUNTRIES					
United Kingdom	1,295,429	1,064,984	4,770,871	8,186,594	42,063,203
Africa					
Gambia	1,026	459	-	13,581	-
Gold Coast	143,518	45,473	-	604,881	-
Nigeria	100,409	40,594	-	315,697	-
Sierra Leone	9,180	5,391	-	57,226	-
Union of South Africa	-	-	740,133	-	3,301,200
Asia					
Hong Kong	30,042	77,144	-	715,586	-
India	-	-	-	-	4,272,138
Malaya and Singapore	27,418	34,348	-	223,303	-
Europe					
Gibraltar	25,695	25,700	-	88,142	-
Malta	-	-	-	-	1,084,533
North America					
Bahamas	25,205	21,830	-	159,795	-
Barbados	35,307	23,049	-	275,630	833
Bermuda	10,859	8,906	-	67,028	-
British Honduras	4,702	6,763	-	36,261	-
Jamaica	240,592	95,872	-	1,214,815	2,490
Leeward and Windward Islands	62,361	79,011	-	552,807	-
Trinidad and Tobago	154,602	243,976	-	1,120,090	-
South America					
British Guiana	61,501	180,400	-	764,433	-
Totals, Commonwealth Countries	2,227,846	1,953,900	5,511,004	14,395,869	50,724,397
FOREIGN COUNTRIES					
Africa					
Azores and Madeira	13,833	8,109	-	30,622	-
Belgian Congo	70,979	21,843	9,186	423,567	9,186
Canary Islands	-	-	-	918	-
Egypt	-	-	-	4,599	
French Africa	1,607	-	-	6,124	-
Liberia	940	-	-	3,474	-
Libya	-	-	-	-	308,000
Morocco	32,656	14,432	-	268,286	-
Portuguese East Africa	-	1,769	171,733	4,455	285,226
Portuguese West Africa	5,607	3,784	-	18,018	-
Spanish Africa	5,306	5,306	-	14,148	-
Asia					
Arabia	-	1,283	-	96,102	-
Indonesia	40,406	5,049	-	69,746	-
Israel	-	-	-	3,060	2,609,064
Japan	183,920	31,828	1,856,046	793,242	25,428,699
Korea	-	-	-	953,046	-
Lebanon	5,539	8,474	-	83,246	-
Philippine Islands	363,029	270,320	-	2,895,152	-
Portuguese Asia	-	-	-	11,237	-
Syria	81	-	-	81	-
Taiwan (Formosa)	-	-	-	-	79,707
Thailand	6,593	20,237	-	185,508	-

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

Destination	November	February		August—February	
	Wheat Flour 1/2/	Wheat Flour 2/	Wheat 3/	Wheat Flour 2/	Wheat 3/
	- bushels -				
Europe					
Austria	-	-	-	-	350,000
Belgium	-	-	495,721	-	8,658,415*
Denmark	225	-	-	1,125	878,700
France	-	-	-	504	709,334
Germany, Federal Republic of	50,918	48,402	-	309,330	9,225,874*
Iceland	17,942	36,558	-	143,973	-
Ireland	-	-	-	-	1,801,221
Italy	52,893	-	-	150,498	364,550
Netherlands	-	-	759,360	16,047	4,966,870
Norway	-	-	491,650	-	1,840,131
Portugal	252	14,634	-	44,496	354,667
Spain	-	-	-	-	3,424,966
Switzerland	-	-	705,393	-	5,952,583
Yugoslavia	1,377	2,871	-	15,732	-
North America					
Alaska	-	-	-	4	-
Costa Rica	27,805	40,504	-	236,196	6,667
Cuba	82,579	54,918	201,414	385,668	884,947
Dominican Republic	38,894	44,941	-	247,324	-
El Salvador	8,721	13,126	-	172,566	-
French West Indies	229	571	-	3,973	-
Guatemala	36,499	14,039	-	282,960	-
Haiti	97,798	38,138	-	405,900	-
Honduras	-	1,377	-	12,735	-
Mexico	-	-	-	549	-
Netherlands Antilles	28,179	24,872	-	127,850	-
Nicaragua	18,041	12,429	-	171,063	-
Panama	18,180	17,950	-	189,220	-
St. Pierre and Miquelon	3,474	112	-	9,418	-
United States					
Flour in terms of wheat	1,120	3,874	-	29,241	-
For milling in bond 4/	-	-	-	-	1,402,244
For domestic use 4/	-	-	286,991	-	2,663,558
Virgin Islands	2,295	-	-	6,885	-
South America					
Bolivia	-	-	-	12,784	846,120
Brazil	1,377	-	-	1,440	-
Colombia	47,713	46,229	2,500	401,337	562,876
Ecuador	19,966	13,986	68,801	41,031	838,666
Peru	-	918	-	16,974	1,141,751
Surinam	6,048	17,550	-	108,036	-
Venezuela	269,649	332,073	-	1,898,492	5,480
Totals, Foreign Countries	1,562,670	1,172,556	5,048,795	11,307,982	75,599,502
Totals, All Countries	3,790,516	3,126,456	10,559,799	25,703,851	126,323,899

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 January wheat export figures as published in the February issue of The Wheat Review should read: Denmark, 1,126,343 bushels; Germany, Federal Republic of, 351,000 bushels.

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

Class and Grade	Week ending			
	Feb. 26	Mar. 5	Mar. 12	Mar. 19
	- cents and eighths per bushel -			
Initial Payment to Producers				
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
International Wheat Agreement and Domestic Sales				
1 Northern	178/6	178/7	179/6	180/1
2 Northern	174/6	174/7	175/2	175/1
3 Northern	170/6	170/7	171/6	172/1
4 Northern	164/6	164/7	165/6	166/1
5 Wheat	161/6	161/7	162/6	163/1
6 Wheat	160/6	160/7	161/6	162/1
Feed Wheat	156/6	156/7	157/6	158/1
1 C.W. Garnet	173/6	173/7	174/1	172/1
2 C.W. Garnet	170/6	170/7	171/1	169/1
3 C.W. Garnet	164/6	164/7	165/1	163/1
1 Alberta Red Winter	175/6	175/7	176/2	175/1
2 Alberta Winter	172/6	172/7	173/2	172/1
3 Alberta Winter	168/6	168/7	169/2	168/1
1 C.W. Amber Durum 1/	197/6	197/7	198/6	199/1
2 C.W. Amber Durum 1/	195/6	195/7	196/6	197/1
3 C.W. Amber Durum 1/	194/6	194/7	195/6	196/1
Export— Class II				
1 Northern	178/6	178/7	179/6	180/1
2 Northern	174/6	174/7	175/2	175/1
3 Northern	170/6	170/7	171/6	172/1
4 Northern	164/6	164/7	165/6	166/1
5 Wheat	161/6	161/7	162/6	163/1
6 Wheat	160/6	160/7	161/6	162/1
Feed Wheat	156/6	156/7	157/6	158/1
1 C.W. Garnet	173/7	173/7	174/1	172/1
2 C.W. Garnet	170/7	170/7	171/1	169/1
3 C.W. Garnet	164/7	164/7	165/1	163/1
1 C.W. Amber Durum	282	282	282	282
2 C.W. Amber Durum	280	280	280	280
3 C.W. Amber Durum	279	279	279	279

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			
	Feb. 26	Mar. 5	Mar. 12	Mar. 19
	- cents and eighths per bushel -			
Initial Payment to Producers				
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
International Wheat Agreement and Domestic Sales				
1 Northern	185/6	185/7	186/6	187/1
2 Northern	181/6	181/7	182/6	183/1
3 Northern	176/6	176/7	177/6	178/1
4 Northern	170/6	170/7	171/6	172/1
5 Wheat	161/6	161/7	162/6	163/1
6 Wheat	160/6	160/7	161/6	162/1
Feed Wheat	156/6	156/7	157/6	158/1
1 C.W. Garnet	173/6	173/7	174/1	172/1
2 C.W. Garnet	170/6	170/7	171/1	169/1
3 C.W. Garnet	164/6	164/7	165/1	163/1
1 Alberta Red Winter	182/6	182/7	183/2	182/1
2 Alberta Winter	179/6	179/7	180/2	179/1
3 Alberta Winter	175/6	175/7	176/2	175/1
Export - Class II				
1 Northern	185/6	185/7	186/6	187/1
2 Northern	181/6	181/7	182/6	183/1
3 Northern	176/6	176/7	177/6	178/1
4 Northern	170/6	170/7	171/6	172/1
5 Wheat	161/6	161/7	162/6	163/1
6 Wheat	160/6	160/7	161/6	162/1
Feed Wheat	156/6	156/7	157/6	158/1
1 C.W. Garnet	173/7	173/7	174/1	172/1
2 C.W. Garnet	170/7	170/7	171/1	169/1
3 C.W. Garnet	164/7	164/7	165/1	163/1
1 Alberta Red Winter	182/7	182/7	183/2	182/1
2 Alberta Winter	179/7	179/7	180/2	179/1
3 Alberta Winter	175/7	175/7	176/2	175/1

CANADIAN FLOUR MILLING SITUATION

Production The production of Canadian wheat flour reported by Canadian mills for February 1954 amounted to 1,718,000 barrels, representing a slight increase from the January 1954 output of 1,662,000 barrels, but below both the February 1953 total of 1,800,000 barrels, and the ten-year (1944-1953) average February production of 1,880,000 barrels. Mills reporting operations during February, 1954 had a total rated capacity of 96,969 barrels per 24-hour day, and on the basis of a 24-day working period 73.8 per cent of this rated capacity was effective.

Wheat milled for flour during the month amounted to 7.6 million bushels as against 7.4 million bushels milled during the preceding month and 8.0 million bushels milled during the same month last year. Of the wheat milled for flour during February, 1954 some 6.8 million bushels were Western Canadian Spring wheat (other than Durum). Most of the balance consisted of Ontario Winter wheat (516,000 bushels) and Durum wheat (82,000 bushels).

Exports According to preliminary Customs returns, exports of Canadian wheat flour during February, 1954 amounted to 694,768 barrels (3,126,000 bushels of wheat equivalent). Flour shipments during the month went to fifty countries and colonies with the United Kingdom taking 1.1 million bushels of wheat equivalent or 34 per cent of the total. Other countries receiving shipments in excess of one hundred thousand bushels, were as follows, in thousands of bushels: Venezuela (322); Philippine Islands (270); Trinidad and Tobago (244); British Guiana (180).

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
Totals	53,612,467	12,137,133	5,711,967
Same period 1952-53 (revised)	62,529,194	13,947,655	7,163,471

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 domestic wheat supplies in the United States for the 1953-54 crop year amount to some 1,731.0 million bushels compared with supplies of 1,547.1 million bushels for 1952-53. Imports of wheat from Canada for all purposes during the first eight months of the current crop year amounted to 2.8 million bushels as against 17.5 million during the July—February period of 1952-53. With anticipated domestic requirements relatively unchanged from those of the preceding crop year, some 1,043.8 million bushels are available for export and for carryover during 1953-54 as against 872.6 million available during 1952-53.

Exports of wheat as grain during the July—February period of 1953-54 amounted to 115.8 million bushels, substantially below the 189.7 million exported during the same period of 1952-53. Exports of wheat flour and products in terms of wheat equivalent during the first eight months of the current crop year totalled 21.3 million bushels, compared with 28.5 million exported during the comparable period of the preceding crop year. Total exports of wheat, wheat flour and products amounted to 137.1 million bushels as against the comparable total of 218.2 million a year ago. The balance remaining on March 1 for export and for carryover was estimated at 906.7 million bushels, some 39 per cent greater than the total available at the same date in 1953.

United States Wheat Supplies

Item	1952-53	1953-54 1/
	- 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—February	17.5	2.8
Total estimated supplies 2/	1,564.6	1,733.8
Less estimated domestic requirements for crop year 3/	692.0	690.0
Available for export and for carryover	872.6	1,043.8
Deduct:		
Exports of wheat as grain, July—February	189.7	115.8
Exports of wheat flour and products in terms of wheat, July—February	28.5	21.3
Total exports of wheat, wheat flour and products	218.2	137.1
Balance on March 1 for export and for carryover	654.4	906.7

1/ Preliminary.
2/ Excluding imports for March—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.

Prospective Plantings of Spring Wheat

The following report on prospective plantings of spring wheat in the United States is taken from the March 19 report of the Crop Reporting Board, United States Department of Agriculture.

.....Seedings of all spring wheat for 1954 are expected to total 16.7 million acres, according to farmers' reported intentions as of March 1. This would be about one-fourth less than the 21.9 million acres seeded last year and one-sixth less than average. At the time farmers reported on their prospective plantings about March 1, they could not determine the effect on their wheat acreage allotment of the increase in allotments for Class II Durum wheat announced by the Secretary of Agriculture in late February. Consequently, the intended plantings do not reflect changes in plans that may result because of revised wheat acreage allotments on farms growing Class II Durum wheat. A total of 63,232,000 acres of all wheat planted is indicated by combining the intended acreage of spring wheat with the acreage of winter wheat planted as estimated last December. This is a decline of 15 1/2 million acres from the 78.7 million acres planted for the 1953 winter and spring wheat crops. The wheat acreage allotment program, with marketing quotas, is the principal factor resulting in a smaller wheat acreage for the 1954 crop.

Intended plantings of durum wheat are indicated at 1.5 million acres, compared with 2.1 million acres planted last year and the average of 2.7 million acres for the 1943-52 period. This prospective acreage for 1954 does not take into account changes that may result from the Secretary's announcement in late February of increased acreage allotments to provide for expansion of production of Class II Durum wheat in 1954. The acreage of durum wheat in the Dakotas and Minnesota has been declining each year since 1949, when 3.8 million acres were planted. Yields have been below average during recent years and in 1953 were less than half of average, because of rust and dry weather. This has tended to discourage planting of durum wheat, even though prices received for the 1953 crop have been higher than for other classes of wheat.

The acreage of other spring wheat that farmers intend to plant is indicated at 15.2 million acres. This would be 4.6 million acres or about one-fourth less than the acreage planted in 1953 and 2.2 million acres or 13 per cent below average. In the North Central States, intended acreage of other spring wheat is 18 per cent below last year and 14 per cent below average, while in the Western States intended acreage of spring wheat is 33 per cent below last year and 9 per cent below average. Plantings of spring wheat in the Western States in 1953 were expanded to compensate for the smaller winter wheat plantings of the preceding fall.

If yields per planted acre should equal the 1948—1952 average, by States, and acreages planted equal those indicated by farmers as of March 1, an all spring wheat crop of 223 million bushels would be produced. Based on conditions as of December 1, 1953, a winter wheat crop of 750 million bushels was indicated for 1954. These add to an all wheat total of 973 million bushels. In 1953, production of all wheat totalled 1,169 million bushels, the fourth largest of record.

Crop and Weather Conditions

The following extraction has been taken from the Weekly Weather and Crop Bulletin for the week ending March 29, 1954: ".... Prospects for small grains were generally improved by additional moderate to heavy precipitation in nearly all sections of the country, except in the middle and southern portions of the western Great Plains where most wheat is in a precarious condition. The critically dry area is centered over extreme southern and western Texas, western portions of Oklahoma and Kansas, eastern sections of New Mexico and Colorado and south-central Nebraska. This region has not received substantial precipitation since the first part of December. During these last fifteen weeks the total moisture that fell in this dry area was generally less than one inch or only about one-tenth to less than one-half of the normal amount. Severe soil-drifting winds on several days caused some additional damage to wheat and further aggravated the moisture deficiency. The Soil Conservation Service of the U. S. Department of Agriculture estimated that on March 1 in Colorado, Kansas, New Mexico, Oklahoma, and Texas about 17 million acres of crop land was in condition to blow and that 9,300,000 acres had suffered moderate to severe wind erosion. The latter figure is slightly less than the total acreage damaged by wind erosion in the 1930's.

The good root establishment of wheat under favourable moisture conditions before winter set in, prevented damage from being more serious. In northwestern Texas, where high winds and dust continue to damage wheat, much of the crop is still holding on. Rains are needed soon to prevent heavy abandonment in extreme western Oklahoma and southwestern Kansas. Precipitation during the week was very beneficial in north-central and northeastern Texas and the eastern two-thirds of Oklahoma and Kansas. Nebraska reported very little additional wind damage to wheat. There were complaints of heavy brown mite infestation in parts of Texas and of mosaic and some green bugs in Kansas. Early fields in south-central Kansas are beginning to joint. ...."

CCC to Sell Spain 10,000,000 Bushels Wheat

According to a press report the U.S. Commodity Credit Corporation will sell $20 million worth of wheat from its stocks to the Spanish Government.

The arrangement for the sale of the wheat was developed co-operatively by the Departments of Agriculture, Defense, State and Treasury, and the Foreign Operations Administration. Under it the CCC owned wheat will be sold for Spanish currency. The CCC will be credited for the amount of the wheat sold. The Defense Department will purchase the Spanish currency from the U.S. Treasury, and will use it to help defray local costs of military construction in Spain, although other U.S. Government agencies may use such currency as need may occur for expenditures in Spain.

The wheat to be purchased by Spain will be outside any purchases with its own foreign exchange and beyond any United States aid.

The Department of Agriculture expects that most of the wheat - which will represent approximately 10 million bushels - will move during April and May.

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
March 1, 1954	239 1/2 - 259 1/2	March 1, 1954	242 3/4
2	239 3/4 - 254 3/4	2	243 5/8
3	243 1/4 - 255 1/4	3	242 1/8
4	237 3/4 - 244	4	239 1/4
5	237 - 245	5	239 1/8
8	240 - 246 3/4	8	241 1/4
9	239 - 248 3/4	9	240 7/8
10	239 - 244 1/2	10	239
11	237 1/4 - 242 3/4	11	238 1/2
12	238 3/4 - 243	12	240 1/8
15	238 - 243 1/4	15	239 1/8
16	237 3/4 - 244 1/2	16	238 7/8
17	238 3/4 - 243 3/4	17	239 1/2
18	237 1/4 - 241 3/4	18	238 5/8
19	238 1/4 - 243 1/2	19	238 3/8
22	238 3/4 - 246	22	236 5/8
23	239 1/2	23	236 5/8
24	238 1/2 - 243 1/4	24	239 1/4
25	240 - 245	25	239 1/8
26	242 1/2 - 245	26	236 5/8
29	239 - 245 1/2	29	236 3/8
30	238 3/4 - 239 1/4	30	236 7/8
31	240 1/2 - 248	31	237 3/8

Chicago Wheat Futures, High Points of Closing

Date	March	May	July	September	December
			- cents and eighths per bushel -		
March 1, 1954	223/4	223	218	220/1	224/2
2	223/4	223	217/2	219/4	223/4
3	222/6	222/6	217/1	219/5	223/5
4	222/3	221/5	216	218	222/3
5	223/3	222/3	215/7	218/2	222/4
8	226/4	225/6	219	221/1	225/2
9	228/1	227/5	220/6	223/1	227/3
10	229/4	229/2	220/2	222/2	226/6
11	228/1	227/3	218	220/4	224/4
12	230	229/7	220/6	223/2	227/2
15	230/7	230	220/6	223	227/1
16	229/3	228/7	219/3	221/5	225/7
17	230	229/4	220/2	222/4	226/7
18	228	228	218/7	221	225/4
19	228/6	227/6	220/4	223	227/1
22	223/7	226/1	219/1	221/1	225/2
23		222/7	215/7	218/1	222/4
24		222/5	215/7	218/1	222/4
25		222/1	214/4	216/5	221
26		220/6	214	216/2	220/4
29		218/5	212/7	215/1	219/2
30		218/1	212/1	214/2	218/2
31		217/2	212/2	214/3	218/4

ARGENTINE SITUATION

Supply Position Estimated total supplies at 302.4 million bushels for the current crop year in the Argentine were unchanged from a month ago. With domestic requirements still placed at 128.6 million bushels, some 173.8 million were available for export and for carryover at the end of the crop year. Exports of wheat as grain and wheat flour in terms of wheat during the December—February period of the 1953-54 crop year totalled 26.1 million bushels, in contrast to only 3.2 million exported during the same period of 1952-53. The balance on March 1, for export and for carryover at the end of the crop year amounted to 147.7 million bushels compared with 151.6 million available at the same date a year ago.

Argentine Wheat Supplies

Item	1952-53	1953-54 1/
	- million bushels -	
Carryover at beginning of crop year (December 1)	1.8	72.8
New crop	277.9	229.6
Total estimated domestic supplies	279.7	302.4
Imports of wheat for domestic use	-	-
Total estimated supplies	279.7	302.4
Less estimated domestic requirements for crop year	124.9	128.6
Available for export and for carryover	154.8	173.8 2/
Deduct:		
Exports of wheat as grain, December—February	3.2	25.6
Exports of wheat flour in terms of wheat, Dec.—Feb.	3/	0.5
Total exports of wheat and wheat flour	3.2	26.1
Balance on March 1 for export and for carryover	151.6	147.7

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 March 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 dollar.

Weather and Crops Except for the province of Buenos Aires, February was rather dry. There have been several fairly good rains in most sectors of the grain zone during the first half of March and pastures throughout are reportedly in good condition. The progress of the corn crop is said to be satisfactory although the dry spell has reduced prospective yields quite noticeably in the western and northern sections of the zone. Ploughing which was halted in February for lack of rain has been started again in some areas. The sunflower crop is developing satisfactorily but production will be limited by the small acreage sown.

1953-54 Wheat Crop Deliveries of this crop are coming forward in quantities adequate to meet all sales commitments and quality remains good. Exports during the first quarter of the crop year have been good at 695,806 tons (25,566,000 bushels). Actual sales, however, have dropped to a very low level during the past month although trade agreements have been signed during that period with Japan and Chile which envisage the purchase by these countries of 330,000* tons (12,125,000* bushels) and 257,000** tons (9,443,000** bushels) of wheat, respectively. Negotiations are reportedly still proceeding with Brazil and there is some evidence that agreement will soon be reached. However, in view of Brazil's purchases from elsewhere and her own relatively good crop, it seems unlikely that her purchase from Argentina this year will compare with the 1,168,266 tons (42,926,000 bushels) exported to that country last year.

Cancellation of flour imports by Brazil has placed Argentine millers in an embarrassing position since they expanded output in an endeavour to supply quickly the 58,800 tons ordered by Brazil last August. To date only 9,725 tons have been shipped and the millers have approached both the Brazilian Ambassador and the Argentine Minister of Foreign Trade in an endeavour to have the full order taken up.

Sales Sales during the past four weeks have reached a low level, the only sizeable quantity of wheat disposed of being 72,000 tons (2,646,000 bushels) to Japan at the beginning of March. A few forward sales against the new corn crop have been reported. Rye production is already heavily committed and there was little activity in oats and barley. The following is a resumé of recent wheat sales:

Sales of wheat in the second half of February were small, totalling 26,650 tons (979,000 bushels) for payment in Danish crowns, florins and Austrian treaty dollars. The price for payment in Danish crowns dropped from 320 pesos per ton ($1.74 per bushel) f.o.b. to 317 pesos ($1.73 per bushel). One sale for U.S. dollars was effected at the end of the month at 305 pesos per ton ($1.66 per bushel).

At the beginning of March a sale of 79,500 tons (2,921,000 bushels) was announced by I.A.P.I. of which it is understood 72,000 tons (2,646,000 bushels) were purchased by Japan at 415 pesos per ton ($2.26 per bushel) f.o.b. and the balance by Peru.

---

* An unknown quantity of wheat flour additional to this may be included.

** 5,000 tons of flour is included which at 72 per cent extraction equals approximately 7,000 tons (257,000 bushels) of wheat.

Grain Shipments Grain shipments in February at 625,295 metric tons brought the total for the first three months of the crop year to 1,866,146 tons. This compares with 376,068 tons for the corresponding three month period of 1952-53, 562,903 tons in 1951-52 and 732,905 tons in 1950-51. The following is a breakdown of the grains shipped in these periods:

Argentine Grain Shipments, December 1, 1953—February 28, 1954

First Quarter Crop Year	Wheat	Corn*	Flax	Oats	Rye	Barley
			- thousand bushels -			
1953-54	25,566	14,333	-	12,869	15,158	10,232
1952-53	3,167	9,126	-	175	249	2,252
1951-52	3,529	8,685	1,352	3,350	2,808	4,084
1950-51	22,425	295	2,914	1,614	239	463

*Corn crop year commences April 1.

Wheat shipments in February accounted for 228,325 tons (8,390,000 bushels), an improvement of 48,884 tons (1,796,000 bushels) over the previous month. Germany was the principal destination receiving 78,136 tons (2,871,000 bushels) followed by the United Kingdom and Belgium with 37,321 tons (1,371,000 bushels) and 33,458 tons (1,229,000 bushels), respectively. Brazil, Japan and the Netherlands accounted for 24,611 tons, 21,358 tons and 20,766 tons (904,000, 785,000 and 763,000 bushels) in that order. Shipments to Peru, Denmark, Switzerland and Chile totalled 5,100 tons, 4,125 tons, 1,950 tons and 1,000 tons (187,000, 152,000, 72,000 and 37,000 bushels). The balance of 500 tons (18,000 bushels) was destined for Italy.

Rye shipments at 155,805 tons (6,134,000 bushels) were even higher than those effected in January and included 6,500 tons (256,000 bushels) to Poland, the first to be shipped of the 300,000 tons (11,810,000 bushels) purchased by that country in January. Nearly 25,000 tons (979,000 bushels) were destined for Hungary and other recipients of rye were Italy with 55,554 tons (2,187,000 bushels), Belgium 25,153 tons (990,000 bushels), Germany 19,902 tons (783,000 bushels), the Netherlands 14,734 tons (580,000 bushels), and Denmark 9,100 tons (358,000 bushels).

Corn was destined chiefly for Germany and France in February which countries received 37,814 tons (1,489,000 bushels) and 19,471 tons (767,000 bushels), respectively out of a total of 106,381 tons (4,188,000 bushels). Belgium followed with 15,991 tons (630,000 bushels) and the United Kingdom, the Netherlands, Italy and Norway received 12,192 tons, 7,328 tons, 5,850 tons and 4,975 tons (480,000, 288,000, 230,000 and 196,000 bushels) in that order. Switzerland and Denmark each received 1,000 tons (39,000 bushels) and 760 tons (30,000 bushels) were shipped to Africa.

Barley.- Belgium and the Netherlands ranked first as recipients of barley in February receiving 32,325 tons (1,485,000 bushels) and 25,495 tons (1,171,000 bushels), respectively out of a total of 76,026 tons (3,492,000 bushels). The United Kingdom and Hungary followed with 8,052 tons (370,000 bushels) and 7,800 tons (358,000 bushels) in that order and Austria, France and Switzerland received 1,200 tons, 700 tons and 454 tons (55,000, 32,000 and 21,000 bushels) of this grain.

Oats were down to 58,758 tons (3,810,000 bushels) from the high January export total. The Netherlands continued as the principal destination with 27,701 tons (1,796,000 bushels) followed by Belgium with 14,657 tons (950,000 bushels). Denmark received 4,250 tons (276,000 bushels), Germany 3,600 tons (233,000 bushels) and the balance was received by Switzerland 3,200 tons (207,000 bushels), Hungary 2,200 tons (143,000 bushels), Austria 2,100 tons (136,000 bushels), and Italy 1,050 tons (68,000 bushels).

The following table shows shipments of all grains in the first two months of 1954 by destination together with totals exported in the corresponding period of recent years:

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

Destination	Wheat	Corn	Flax	Oats	Rye	Barley
			- thousand bushels -			
Austria	-	-	-	136	-	78
Belgium	1,396	998	-	1,647	2,565	2,102
Brazil	2,957	-	-	9	-	-
Chile	184	-	-	-	-	-
Denmark	201	39	-	464	900	-
France	-	1,421	-	-	-	53
Germany	5,188	3,442	-	763	1,579	93
Hungary	-	-	-	143	979	358
Israel	-	-	-	-	404	-
Italy	18	329	-	348	3,193	30
Japan	1,011	-	-	-	-	-
Netherlands	1,157	552	-	3,685	1,630	2,347
Norway	-	489	-	-	-	-
Paraguay	82	-	-	-	-	-
Peru	700	-	-	-	-	-
Poland	-	-	-	-	256	-
South Africa	-	30	-	-	-	-
Switzerland	514	142	-	919	22	580
United Kingdom ..	1,575	996	-	-	227	831
United States ...	-	-	-	1,539	-	-
Totals	14,983	8,437	-	9,652	11,753	6,473
Same period:						
1953	2,948	5,808	-	175	249	1,944
1952	2,008	6,973	817	1,879	2,133	3,484
1951	17,473	150	2,041	484	239	276
1950	20,228	7,646	-	2,576	401	2,051
1949	16,151	12,114	-	1,168	715	660

URUGUAYAN GRAIN ESTIMATES, 1953-54

Production of wheat in Uruguay in 1953-54 established a record of 707,076 metric tons (26.0 million bushels), according to the first official estimate. This confirms earlier trade forecasts and represents an increase of 65 per cent over the previous season's output from a sown area which was 31 per cent higher than in 1952-53. On the other hand sowings to flax were reduced by 50 per cent partly as a result of poor outturn last year and because of the depression in marketing prospects abroad. However, good yields compensated in part for the lower acreage and production at 81,188 tons (3.2 million bushels) was only 25 per cent less than in 1952-53. Barley production increased by over 70 per cent and oats by 39 per cent.

The following table gives the Ministry of Agriculture's first and second estimates of sown acreage for 1953-54 and production figures for 1953-54 and 1952-53:

Uruguayan Grain Estimates

Grain	Area Sown, 1953-54		Production	
	1st Estimate	2nd Estimate	1952-53	1953-54 1st Estimate
	- thousand acres -		- thousand bushels -	
Wheat	1,599	1,670	15,672	25,981
Flax	300	283	4,274	3,196
Oats	189	188	2,494	3,470
Barley	90	106	1,018	1,753
Rye	1/	1/	2	4

1/ Less than 500 acres.

AUSTRALIAN SITUATION

Supply Position Total estimated supplies of wheat in Australia for 1953-54 now stand at 235.0 million bushels, consisting of a carryover of 36.0 million bushels and the 1953 crop officially placed at 199.0 million bushels. With domestic requirements estimated at 78.0 million bushels, some 157.0 million bushels were available for export and for carryover during the current crop year compared with 137.2 million available during 1952-53.

Exports of wheat as grain during the period from December 1, 1953 to February 27, 1954 amounted to 5.8 million bushels as against 8.9 million during the comparable period of 1952-53. Exports of wheat flour in terms of wheat equivalent during the first quarter of the current crop year were 6.9 million bushels compared with exports of 9.6 million for the same three months of the preceding crop year. Total exports of wheat and wheat flour in terms of wheat at 12.7 million bushels were 5.8 million bushels below the comparable 1952-53 level of 18.5 million. The balance remaining on March 1, 1954 for export and for carryover was estimated at 144.3 million bushels compared with 118.7 million available at the same date in 1953.

Australian Wheat Supplies

Item	1952-53	1953-54 1/
	- million bushels -	
Carryover, including flour as wheat, at beginning of crop year (December 1)	18.0	36.0
New crop	195.2	199.0
Total estimated supplies	213.2	235.0
Less estimated domestic requirements for crop year	76.0	78.0
Available for export and for carryover	137.2	157.0
Deduct:		
Exports of wheat as grain, December 1 to February 27	8.9	5.8
Exports of wheat flour in terms of wheat, December 1 to February 27	9.6	6.9
Total exports of wheat and wheat flour	18.5	12.7
Balance on March 1 for export and for carryover	118.7	144.3

1/ Preliminary.

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 March 16, 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 $2.1755 (Canadian), the quotation in effect on March 5, 1954.

1953-54 Wheat Crop Statistics issued by the Commonwealth Statistician on 1st March, 1954 estimate the 1953-54 Australian wheat harvest at 199 million bushels from a revised acreage figure of 10,690,000 acres, giving an average yield of 18.6 bushels per acre.

The present estimate of the 1953-54 crop exceeds the forecast published on 14th December, 1953 by 480,000 acres and 25.5 million bushels. The estimated area sown in 1953-54 is 480,000 acres more than sowings in 1952-53, but 3,190,000 acres less than the record post-war year 1947-48, when the acreage reached 13,880,000 acres.

The estimated production of 199 million bushels is 21,100,000 bushels (9.6 per cent) less than the record 1947-48 harvest but is 3,800,000 bushels (1.9 per cent) more than for 1952-53 and 44,700,000 bushels (30 per cent) more than average production for the five years ended 1938-39. The estimated average yield of 18.6 bushels per acre is lower than the record of 19.1 bushels per acre in 1952-53, but is higher than for any other year. It exceeds the average for the five years ended 1938-39 by 6.7 bushels per acre.

Australia's Wheat Surplus — The Chairman of the Australian Wheat Board estimates that Australia will have a surplus of 80 million bushels of wheat this year. Last December, the Board had nearly 36 million bushels of unsold wheat and had received about 181 million bushels from the current harvest, giving a total of nearly 217 million bushels. Of this amount about 60 million bushels would be sold to Australian buyers and about the same quantity would be sold overseas, although this is dependent on export markets. If these estimates were correct, the Board would have a surplus of about 80 million bushels in addition to the normal working carryover of about 16 million bushels.

The Board is planning extra storage centres in Western Australia, Victoria and New South Wales to allow wheat silos to be fumigated between harvests.

Wheat Stabilisation Plan — With the refusal of the Victorian Government to come into line with the other Commonwealth wheat growing States, in connection with the proposed Stabilisation Scheme to cover the current crop, it seems at the moment that the renewal of the scheme may fall through. At present, all States are working under a marketing plan administered by the Australian Wheat Board with a home consumption price of 14/- ($1.52) per bushel ex Ports, and they are participating in the maximum and minimum prices under the I.W.A. agreement to the extent of a 48 million bushel quota.

If no new Wheat Stabilisation Scheme is arranged following a ballot by growers, it is understood that the Commonwealth Government will then refund to growers about £9 million ($19,580,000) held as a guarantee against loss on the anticipated Stabilisation Scheme.

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 March 15, 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 1 franc = .00276 Canadian dollars, the rate in effect on March 5, 1954.

Weather and Crops — The month of February was marked by extreme cold at the beginning, which inflicted limited damage on winter grains. Even with the subsequent moderation of temperature, there has been a cessation of plant growth and of field work.

The March 1st report of the Ministry of Agriculture indicates that frost damage to grain fields affected around 120,000 hectares (296,000 acres) of which 88,000 hectares (217,000 acres) represent wheat, 15,000 (37,000 acres) barley and 17,000 (42,000 acres) oats. Furthermore, the Ministry's index of the general condition of the crop has now been revised downwards by about 10 per cent from January, although it remains on the same level as this time last year.

The March 1st estimate of grain acreages compared with previous years is as follows:

March 1 - Acreage Estimates

Grain	March 1, 1952	March 1, 1953	March 1, 1954
		- thousand acres -	
Wheat	10,229	9,602	10,501
Wheat and Rye	61	59	53
Rye	1,131	1,025	1,029
Barley	781	874	874
Oats	1,515	1,568	1,437
Mixed grains	93	94	74

Source: Ministry of Agriculture.

The March 1st estimate of the area to wheat at 4,251,600 hectares (10,501,000 acres) is around 70,000 (173,000 acres) below that for January due to frost damage and subsequent revision. However, this figure is still 9.4 per cent above March 1953 and 2.7 per cent above March 1952. Frost damage has been limited to the area north of the Seine and, while fairly widespread, has been most serious in the north of the Marne département and the areas bordering Belgium; in certain districts losses reached 50 to 60 per cent.

While at first there was considerable alarm over the possible extent of losses, frost damage is now considered lower than was originally estimated; many fields which show obvious withering are found, on closer inspection, to have roots and stalks intact with sign of new shoots. This resistence to frost is attributed to the advanced growth and excellent condition of the fields and also to the fact that the frost came slowly and left gradually. However, the Ministry of Agriculture index for wheat is shown as 64 for March 1st, compared with 74 in January. The extent to which yields will be affected is, of course, not known.

I.W.A. Passed by Both Houses — Law No. 713 covering French adherence to the International Wheat Agreement has now been passed by both the National Assembly and the Conseil de la République, the former on December 31st and the latter on February 25th. The next step is for the President formally to notify the Wheat Council. The French quota for the new agreement was reduced to a token level of 10,000 tons (367,000 bushels) compared with the former quota of 111,000 (4.1 million bushels). This was due to poor crop prospects at the time of negotiations, past experience of reduced export surpluses and the uncertain outlook of the international market.

French Foreign Trade in Wheat — Year-end statistics covering French foreign trade in 1953 indicate a marked improvement in the wheat position over the previous year.

French Trade With Foreign Countries

Year	Imports	Exports
	- thousand bushels -	
1950	796	20,254
1951	6,423	18,378
1952	24,353	4,071
1953	755	8,570

Source: Government Statistical Office.

The above figures are somewhat misleading in that they do not coincide with the crop year. As a result of the reduced wheat crop in 1951, imports during the following year were high, but with the good crops during the past two summers, there has been a change in the relative position. The export surplus from the 1953 crop is estimated at 700,000 tons (25.7 million bushels) but the above statistics indicate that less than half of this had been shipped by the end of the year, so that exports in the first part of 1954 will continue high.

French wheat imports in 1953 came from Canada, 15,182 tons (558,000 bushels) and Turkey, 4,234 tons (156,000 bushels); Germany is the principal client with purchases of 175,528 tons (6.4 million bushels). Quantities were also shipped to Yugoslavia, 24,657 tons (906,000 bushels); United Kingdom, 17,109 tons (629,000 bushels); the Netherlands, 10,030 tons (369,000 bushels), and Switzerland, 3,628 tons (133,000 bushels).

There is also a substantial import trade with North Africa, mainly for Durum wheat.

French Trade With Overseas Territories

Year	Imports	Exports
	- thousand bushels -	
1950	7,368	4,722
1951	3,792	367
1952	3,752	169
1953	8,011	10

Source: Government Statistical Office.

New Grain Board Directorate — A government decree of September 30th last restored the original interprofessional status of the French Grain Board, and provided specifically that the governing Council would be composed of 43 members from the following professions: 22 representing grain producers; 15 representing the trade and 6 representing consumers.

The Council has now been chosen, and at their first meeting on March 10th elected their executive officers. The choice for president was

Mr. Albert Barré, present vice-president of the Wheat Producers Association. The three vice-presidents chosen by the Council were Mr. Deleau, president of the Wheat Producers Association; Mr. Brisson, president of the French Milling Association and Mme Donon representing Families Associations. The Council has wide powers, in cooperation with the government, to regulate prices, establish stocks, assess domestic requirements, fix the extraction rate, dispose of surpluses, handle all foreign trade in grains, etc.

Taxes on Wheat and Milling Trade — The French Milling Association has compiled the following table of taxes such as are applied to wheat at various levels from farm to consumer.

	Per 220 Pounds of Wheat	Per 220 Pounds of Flour	Per 2.2 Pounds of Bread
	- Canadian dollars -		
Statistics tax	.0828	.1061	.0008
Levy for Technical Progress Fund.	.0221	.0283	.0002
Levy on deliveries to offset export subsidy	.1656	.2123	.0016
Tax for Agricultural Family Allowances	.6955	.8917	.0068
Tax "Blanchet" (levy to finance stocks retained by Grain Board)	.0828	.1061	.0008
Tax for Stabilization Fund	.2001	.2565	.0020
Sales tax on wheat	.1130	.1449	.0011
Sales tax on flour	.1214	.1557	.0012
Levy on milling operation	.0065	.0083	.0001
Total	1.4898 1/	1.9099 2/	.0146 3/

1/ Basic price of 3,600 francs per quintal ($2.70 per bushel) to farmers.
2/ Flour retail at bakers 69 francs per kilo ($.0866 per pound) or 6,900 per quintal ($16.93 per barrel).
3/ Retail 52 francs per kilo ($.0718 per pound).

Much of the money levied on food products goes back to agriculture in the form of subsidies. In reply to a question submitted in the National Assembly recently, the Minister of Agriculture gave the following information on government subsides to grain cooperatives. The percentage indicates that part applying to grain against all agricultural cooperatives.

Government Subsidies to Grain Cooperatives

Year	Canadian Dollars	% of Total	Year	Canadian Dollars	% of Total
1945 ...	4,156	31.5	1950 ...	1,363,788	30.1
1946 ...	6,088	4.9	1951 ...	2,645,640	35.0
1947 ...	2,549	3.0	1952 ...	512,544	20.0
1948 ...	124,216	16.4	1953 ...	624,922	21.0
1949 ...	588,857	21.3			

Source: Wheat Producers Association.

ITALIAN SITUATION

According to a report received from Dr. C.F. Wilson, Canadian Agricultural Counsellor in Rome "A revised estimate of the Italian wheat crop in 1953 has been released which puts the total at 331 million bushels, some 8 millions higher than the earlier estimate. This is Italy's all-time record crop and it places Italy first among European producers for the 1953 season as it exceeds slightly the production in France.

Italy's large crop has been confirmed by deliveries from farms. The mills have no difficulty in obtaining their requirements on the open market, and consequently the amassment stores have not been heavily drawn upon.

The only import commitment made by Italy so far during the 1953-54 season has been the one recently concluded with the U.S.S.R. for 125,000 metric tons of Durum wheat to supplement domestic Durum supplies, although the greater part of this quantity will not be shipped until the latter half of 1954 because there is no urgent need, even for Durum wheat, in Italy during the present crop season."

Supply Position (con't from p. Preliminary Customs returns indicate that an additional 3.1 million bushels of wheat flour in terms of wheat equivalent were exported during February 1954. Exports of wheat as flour during January amounted to 4.0 million bushels while the adjusted February, 1953 total stands at 3.6 million bushels. Total exports of wheat flour for the August—February period of the current crop year amounted to 25.7 million bushels, compared with the adjusted figure of 32.2 million bushels for the corresponding period of the preceding crop year.

NOTES ON NEW CROPS

Trade reports indicate that beneficial rains fell over much of Europe during the last week of March. Crops are said to be making fair to good progress in most regions while spring planting operations are under way, although still backward in some sections.

Occasional rains have been received in the United Kingdom and winter grain conditions are mainly satisfactory although growth is somewhat backward. Planting of spring grains is well under way but late. In France, the weather has been clear and sunny after heavy rains and crops are reported to be growing well. Heavy rains improved the moisture situation in Western Germany but crops are considered less promising than a year ago and indications are that frost damage to wheat has been greater than believed earlier. Winter grains are deemed to be in favourable condition in Italy but spring sowing has been delayed. Moisture supplies are satisfactory but clear weather is desired to facilitate spring field work.

Spring sowing has made good progress in Austria but is backward in Hungary. Crop prospects are now good in Syria, although the critical period prior to harvest still remains. Severe thunderstorms have caused local damage to wheat in northwestern India but the weather has again turned favourable for the ripening and harvesting of crops.

CALENDAR OF WHEAT EVENTS

March 1 According to Foreign Crops and Markets the Italian Government recently signed a trade agreement with the Soviet Union for 100,000 to 120,000 metric tons (3.7 million to 4.4 million bushels) of Durum wheat at $98.50 per ton ($2.68 per bushel) f.o.b. Black Sea ports.

8 According to Foreign Crops and Markets, Brazil's import requirements of wheat during 1954 are indicated at about 1.4 million tons (51.4 million bushels).

12 Wheat flour production during January, 1954 in the United States was estimated by the Bureau of the Census at 18,962,000 sacks, an average of 948,000 sacks per working day, compared with working-day averages of 833,000 sacks during December, and 942,000 in January 1953.

19 According to a report issued by the Crop Reporting Board of the United States Department of Agriculture, prospective seedings of all spring wheat for 1954 are expected to total 16.7 million acres. This would be about one-fourth less than the 21.9 million acres seeded last year and one-sixth less than the 1943-1952 average seedings. A total of 63.2 million acres of all wheat for 1954 is indicated by combining the current prospective acreage of spring wheat with the seeded acreage of winter wheat as estimated last December. The total seeded acreage of all wheat for the 1953 crop was 78.7 million acres.

31 The Department of External Affairs announced the signature of an Agreement on Commerce for the exchange of most-favoured-nation treatment between Canada and Japan.

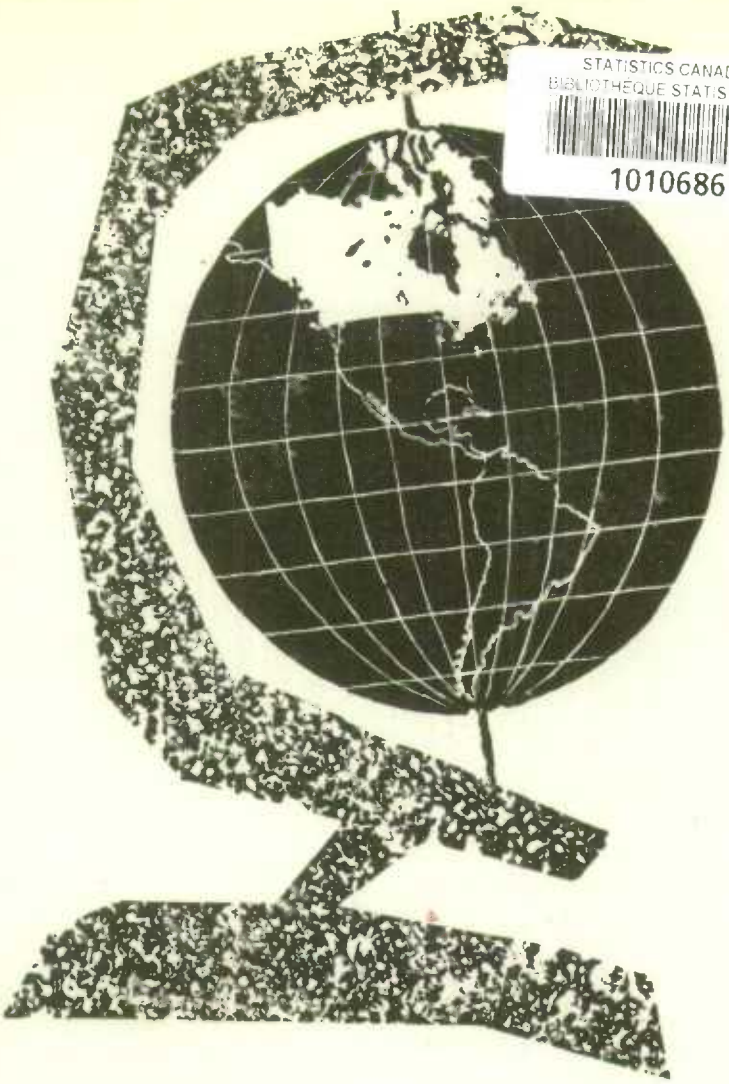
The President of the United States has announced quotas relating to the imports of rye from all countries into the United States. From April 1, 1954 to June 30, 1954 the quota will be 31,000,000 pounds (553,572 bushels). In the next crop year, July 1, 1954 to June 30, 1955, a quota of 186,000,000 pounds (3,321,428 bushels) will be in effect.

The Argentine Central Bank estimates the 1953-54 Argentine wheat crop at 6.0 million metric tons (220.5 million bushels).

April 2 The gross value of production of Canada's 1952 wheat crop, based on prices received by farmers during the 1952-53 crop year was estimated at $1,091 million or about 47 per cent of the total $2,306 million for the eighteen major field crops covered in the estimate. The farm value of the 1952 wheat crop in the Prairie Provinces was estimated as follows: Manitoba, $92.9 million; Saskatchewan, $691.6 million; and Alberta, $263.2 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.

Revised estimates place the July 31, 1953 carryover of Canadian wheat in all positions at 369.2 million bushels. The new total is made up of 'visible' supplies, 286.6 million; farm stocks, 79.7 million, and mill stocks of 2.9 million.

STATISTICS CANADA LIBRARY
BIBLIOTHEQUE STATISTIQUE CANADA
1010686780



you know how your business fits into the Canadian scene . . .

but what about the rest of the world?

what do you know about your competitors abroad? . . . possible new sources of supply? . . . the overseas markets where there are chances for you to sell?

you'll find the answers to these and many other questions in ***foreign trade***, weekly publication of the Department of Trade and Commerce. Canadian Trade Commissioners in some fifty offices around the world report to you through the pages of ***foreign trade***.

in *foreign trade* you will find

news about export opportunities
reports on overseas markets
leads on new sources of supply
news about your foreign competition
the latest foreign trade and tariff regulations
up-to-date reports on business conditions around the world

for a world-wide picture of business today

read

foreign trade

two dollars a year *$3.50 a year outside Canada

Supervisor of Government Publications,
The Queen's Printer,
Ottawa, Canada.

Please send me *Foreign Trade* for one year. Enclosed is my cheque/money order for $2.00* made payable to the Receiver General of Canada.

Name _____

Address _____

_____