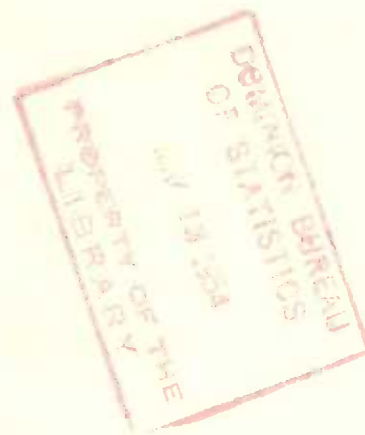


22-005
v. 24
no. 9
Apr. 1954
c. 2



DOES NOT CIRCULATE
NE PAS PRÊTER

CANADA
DOMINION BUREAU OF STATISTICS
AGRICULTURE DIVISION



THE WHEAT REVIEW



APRIL, 1954

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

ERRATA

Please make the following changes in your Copy of "Financial Statistics of Provincial Governments, 1951 - Revenue and Expenditure".

P. 6	Yukon Poll Tax	-	Change from 14 to 16
	Yukon Total	-	Change from 16 to 18
P. 10	Ontario, Item 40	-	Change from 359,628 to 358,628

DOMINION BUREAU OF STATISTICS
Department of Trade and Commerce

THE WHEAT REVIEW

APRIL, 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.

TABLE OF CONTENTS

	Page
World Wheat Situation	
Current Supplies	1
World Grain Exports 1952-53	1
I.W.A. Sales and Purchases, Crop Year 1953-54	2
Canadian Situation	
Supply Position	3
Wheat Stem Sawfly	4
Canadian Wheat Stocks at March 31, 1954	5
Farmers' Marketings	6
Farmers' Marketings by Crop Districts, 1952-53	7
Visible Supply of Canadian Wheat	9
Grading of Wheat Inspected, August—March, 1953-54 with Comparisons	9
Weekly Visible Supply and Farmers' Marketings (Charts)	10
Wheat Shipments to the United States by Destination	11
Rail Shipments of wheat to Maritime Ports	11
Rail Shipments of Wheat from Fort William-Port Arthur	12
Freight Assistance Shipments	13
Monthly Export Clearances	14
Exports of Canadian Wheat and Wheat Flour by Destination, 1953-54	15
Canadian Wheat Board Weekly Average Cash Wheat Prices	17
Canadian Flour Milling Situation	
Production and Exports	19
United States Situation	
Supply Position	20
April Winter Wheat Crop Estimate	21
Amber Durum Wheat in Short Supply	21
Wheat Stocks on Farms	22
Stocks of Wheat in All Positions April 1, 1954	22
CCC Storage Plans	23
Reseal Program for Farm-Stored Wheat	23
Cash Wheat Prices on the Kansas City and Minneapolis Markets	24
Chicago Wheat Futures, High Points of Closing	24
Argentine Situation	25
Australian Situation	29
French Situation	33
Condition of the Italian Wheat Crop	35
Reported Sale of Wheat by Turkey to Poland	35
Calendar of Wheat Events	36

WORLD WHEAT SITUATION

Current Supplies Latest available estimates indicate that supplies of wheat remaining on or about April 1, 1954 in the four major exporting countries for export and carryover at the end of their respective crop years amounted to 1,844.6 million bushels, some 31 per cent greater than the 1,406.0 million bushels available a year ago. Supplies at April 1, 1954 (in millions of bushels) were held as follows, with last year's figures in brackets: United States, 923.1 (620.1); Canada, 652.3 (530.0); Argentina, 129.9 (148.8); and Australia, 139.3 (107.1). Estimates for both years include on-farm stocks as well as those in commercial positions.

World Grain Exports 1952-53 According to the Foreign Agricultural Service of the United States Department of Agriculture world exports of grain and grain products, exclusive of rice, totalled 40,568,289 long tons during the year ending June 30, 1953. Last season's total grain exports represented a decline of about 2 million tons from 1951-52, thus arresting the upward trend which had prevailed since World War II. The 1952-53 wheat exports, although below the preceding season, were at a considerably higher level than the pre-war and post-war averages. Last season's coarse grain exports were near the pre-war level but considerably above 1945-1949.

The decline in world grain exports since 1951-52 reflects some re-adjustment from the very abnormal post-war food requirements emanating from the war. However, progress in the economic recovery of such areas, together with large grain crops during the past two seasons, has substantially reduced the aggregate import requirements from the high level of 1951-52. Aside from the increase (over pre-war) in grain exports, significant shifts have occurred since the war in the source and destination of the world's grain trade. Europe, traditionally the major importer of grains, has retained that position, with a large part of her post-war imports having been made under various Economic Aid programs. Very substantial increases have occurred during recent years in grain shipments to Asia and Africa, the 1952-53 exports to these continents totalling 8.6 million and 2.0 million tons, respectively.

During the pre-war period, Asia imported about 2.0 million tons of grains and Africa approximately 341,000 tons. These new export outlets, and to a lesser extent expanded European trade, have greatly affected the traditional trade patterns of the major supplier of grains. The United States, largely because of aid programs, has sharply increased exports since the war, whereas, Argentina, partly because of recent poor crops, has become a relatively less important supplier of world grains. Significant changes have similarly occurred in other exporting countries.

Although the decline in world exports since 1951-52 indicates a re-adjustment from the abnormal post-war trade, new and expanded markets, changes in consumption, and other factors point to a continuation of trade patterns substantially different from those prevailing before the war. This applies not only to the recipients of grain but also to the supplying sources. These factors should be taken into account in comparing current trade data with pre-war.

Wheat continues to be the dominant grain moving into international trade channels, the 1952-53 wheat and flour exports totalling almost 26.5 million tons, or about two-thirds of the total world's grain exports. Virtually all these exports were for human consumption. Although the quantity exported last season was over 2 million tons below the record level of 1951-52 it was still much above the pre-war average of about 14.8 million tons when wheat accounted for slightly over half of the total world grain trade.

The significant increase in wheat trade during the immediate post-war years was characterized by the sharp rise in U.S. shipments, over half of which were made under various Aid programs to meet food shortages caused by the war. In contrast, the decline in shipments in 1952-53 and during the current season (1953-54 total wheat exports will be considerably below 1952-53) reflect lower import requirements as deficit areas continue to recover generally from the effects of the war. Also, two successive large (and fairly well distributed) world wheat crops have resulted in a more favourable supply position for breadgrains in most of the major wheat importing countries.

During 1952-53, a total of 27.2 million long tons of breadgrains were exported from all sources—26.5 million tons of wheat and 0.7 million tons of rye. Coarse grain exports during the past season consisted of 6.7 million tons of barley, 4.4 million of corn, 1.7 million of oats, and 0.6 million tons of sorghum. Canada was the world's leading exporter of breadgrains in 1952-53 with the United States retaining its leading post-war position as an exporter of coarse grains.

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	9,877	-	-	1,149	11,026	12,857
Bolivia	4,042	695	-	-	556	1,251	2,791
Brazil	13,228	3,733	-	-	-	3,733	9,495
Ceylon 4/.....	10,288	763	9,525	-	-	10,288	-
Costa Rica	1,286	495	-	-	595	1,090	196
Cuba	7,422	1,413	-	-	2,945	4,358	3,064
Denmark	1,837	-	-	-	-	-	1,837
Dominican Republic ..	955	253	-	-	314	567	388
Ecuador	2,388	1,611	-	-	431	2,042	346
Egypt	14,697	-	-	-	1,888	1,888	12,809
El Salvador	735	201	-	-	485	686	49
Germany	55,116	8,879	1,889	-	13,166	23,934	31,182
Greece	12,860	-	-	-	2,277	2,277	10,583
Guatemala	1,286	144	-	-	616	760	526
Haiti	1,837	489	-	-	814	1,303	534
Honduras Republic ...	551	68	-	-	390	458	93
Iceland	404	166	-	-	90	256	148
India	36,744	-	345	-	-	345	36,399
Indonesia	6,246	5	2,999	-	549	3,553	2,693
Ireland	10,105	1,551	653	-	-	2,204	7,901
Israel	8,267	2,949	-	-	-	2,949	5,318
Japan	36,744	11,690	-	-	24,848	36,538	206
Jordan	2,940	-	-	-	-	-	2,940
Korea	1,470	-	-	-	-	-	1,470
Lebanon	2,756	-	-	-	23	23	2,733
Liberia	73	25	-	-	9	34	39
Mexico	14,697	-	-	-	2,946	2,946	11,751
Netherlands	24,802	4,932	-	-	9,611	14,543	10,259
New Zealand	5,879	-	4,242	-	-	4,242	1,637
Nicaragua	367	130	-	-	216	346	21
Norway	8,451	2,343	-	-	2,696	5,039	3,412
Panama	735	303	-	-	277	580	155
Peru	7,349	110	-	-	588	698	6,651
Philippines	8,672	3,593	10	-	2,485	6,088	2,584
Portugal	7,349	737	393	-	2,311	3,441	3,908
Saudi Arabia	2,572	-	-	-	1,410	1,410	1,162
Spain 4/	9,186	-	-	-	9,322	9,322	-
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	3,126	-	-	2,178	5,304	943
Yugoslavia	3,674	-	-	-	2,323	2,323	1,351
Totals		72,677	20,056	-	90,112	182,845	
Guaranteed Quantities (Exporting Countries)		163,231	48,000	367	209,558	421,156	
Balance		90,554	27,944	367	119,446	238,311	

1/ Canadian sales through April 13, 1954.

2/ Sales recorded by International Wheat Council through April 9, 1954.

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

4/ Quota filled.

CANADIAN SITUATION

Supply Position Total estimated supplies of wheat in Canada for 1953-54 consisting of a carryover of 369.2 million bushels and the 1953 crop of 614 million amount to some 983.2 million bushels unchanged from a month ago. In 1952-53 total estimated supplies were 905.1 million bushels. After deducting anticipated domestic requirements of 160.0 million bushels, some 823.2 million 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-March period of the current crop year amounted to 170.9 million bushels as against 224.7 million for the same period of the preceding crop year. The balance available at April 1 for export and for carryover during 1953-54, at 652.3 million bushels, exceeded by 23 per cent the total of 530.0 million bushels at April 1, 1953.

Canadian Wheat Supplies

Item	1952-53	1953-54 <u>1/</u>
- 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-February	<u>2/</u>	<u>2/</u>
Total estimated supplies	905.1	983.2
Less estimated domestic requirements for crop year	150.4	160.0
Available for export and for carryover	754.7	823.2
Deduct:		
Overseas clearances of wheat as grain, Aug.-March....	169.4	136.3
Exports of Canadian wheat to U.S., Aug.-March	18.3	4.2
Total exports of wheat	187.7	140.6
Exports of wheat flour in terms of wheat, August-March	37.0 <u>3/</u>	30.3
Total exports of wheat and wheat flour	224.7	170.9
Balance on April 1 for export and for carryover	530.0	652.3

1/ Preliminary. 2/ Less than 50,000 bushels.

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

Primary marketings of wheat by Western Canadian farmers, although not heavy, have continued at a fairly uniform rate during the four-week period ending April 14, varying from a low of 2.3 million bushels for the week ending March 24 to a high of 3.7 million for the week ending April 14. During the same period the visible supply declined by 11.2 million bushels to a total of 351.6

million at April 14. Comparable totals of Canadian wheat in visible positions at approximately the same date amounted to 270.4 million in 1953 and 196.4 million in 1952. Some 55 per cent or 194.2 million bushels of total visible supplies was held in country elevators compared with stocks of 140.7 million and 80.3 million bushels in the same position at mid-April in 1953 and 1952, respectively. Wheat stocks at Vancouver-New Westminster, at 10.0 million bushels were somewhat larger than the 6.2 million in this position in 1953 but slightly below the 10.8 million held in 1952. With the opening of lake navigation pending, Lakehead stocks of 54.7 million bushels at April 14 were unchanged from a month ago but exceeded by a considerable margin supplies of 23.5 million and 30.4 million in 1953 and 1952, respectively. April 14 stocks of 33.8 million bushels in Bay, Lake and Upper St. Lawrence Ports were well above stocks of 19.6 million bushels at approximately the same date a year ago and 10.1 million bushels two years ago. In eastern forward export positions, (Lower St. Lawrence and Maritime Ports) current mid-April wheat supplies amounted to 19.2 million bushels as against the comparable 1953 and 1952 stocks of 16.9 million and 11.4 million bushels.

Total exports of wheat as grain and wheat flour during March 1954 amounted to 18.9 million bushels, exceeding the previous month's shipments of 13.7 million bushels by some 38 per cent. March, 1954 exports were also greater than those of March, 1953 when shipments totalled 16.9 million bushels. Exports of wheat as grain during the eighth month of the current crop year totalled 14.2 million bushels considerably above the 10.6 million bushels shipped during the preceding month. Total exports of wheat as grain during the August-March period of the 1953-54 crop year amounted to 140.6 million bushels as against 187.7 million for the same period of 1952-53. The United Kingdom remains the principal market for Canadian wheat, taking some 46.2 million bushels, representing virtually one-third of the total export movement of wheat as grain during the August-March period of 1953-54. Other major markets for Canadian wheat during the period, with quantities in millions of bushels, were as follows: Japan, 28.6; Federal Republic of Germany, 10.9; Belgium, 10.1; Switzerland, 7.0; The Netherlands, 5.2; South Africa, 4.4; India, 4.3; United States, 4.2 (of which 1.4 was for milling in bond); Spain, 3.4; Israel, 2.6; Norway, 2.0; Ireland, 1.8; Peru, 1.5; Malta, 1.1 and Cuba 1.1.

Preliminary Customs returns indicate that the equivalent of an additional 4.6 million bushels of wheat was exported in the form of wheat flour during March 1954, an increase of 48 per cent over the 3.1 million bushels of wheat equivalent exported during February. The adjusted March 1953 total stands at 4.7 million bushels. Total exports of flour in terms of wheat for the August-March period of the current crop year amounted to 30.3 million bushels compared with the adjusted figure of 37.0 million bushels for the corresponding period of the preceding crop year.

Wheat Stem Sawfly More wheat stem sawflies can be expected in southern Alberta this year, according to a report by entomologists of the Field Crop Insect Laboratory, Science Service, Lethbridge. An increase occurred during the past year, and even greater numbers are expected in 1954. The amount of damage will depend largely on steps taken to control the sawflies.

The best way to control them is to grow the sawfly resistant Rescue and Chinook wheats, the entomologists say. Wherever damage occurred in Alberta during the past season, one of these varieties should be sown. Where seed can be obtained, Chinook is preferable because of its drought resistance and higher quality. (continued on page 36)

Canadian Wheat
Stocks at
March 31, 1954

Total stocks of Canadian wheat at March 31, 1954 were estimated by the Dominion Bureau of Statistics at 741.2 million bushels, compared with 606.3 million on the same date in 1953 and the record 762.4 million in 1943. The ten-year (1944-1953) average was 365.3 million bushels. Data for these estimates were obtained from the Bureau's annual March 31 survey of grain held on farms, from returns by mill operators, and from information supplied by the Statistics Branch of the Board of Grain Commissioners for Canada relative to stocks of grain in commercial positions.

An estimated 382.7 million bushels of this year's March 31 wheat stocks, representing about 52 per cent of the total were held on farms, exceeding by some 53.6 million the previous record of 329.0 million bushels set only last year. All but 8.7 million bushels of the total farm stocks were held on farms in the Prairie Provinces. Farm-held stocks in Saskatchewan were placed at 255.0 million, while those in Alberta and Manitoba were placed at 98.0 million and 21.0 million bushels, respectively. Of the 358.5 million held in off-farm positions, 197.2 million were in country elevators. Lakehead stocks amounted to 54.6 million bushels, compared with stocks of 33.8 million and 42.8 million bushels in the same position in 1953 and 1952, respectively. Stocks in Eastern elevators at 50.9 million bushels exceeded by wide margins the comparable March-end stocks of 30 million in 1953 and 19.3 million in 1952.

Stocks of Canadian Wheat at March 31, 1952-1954 1/

Position	1952	1953	1954
- thousand bushels -			
<u>In Canada</u>			
On farms	251,915	329,050	382,660
Country elevators	91,733	144,638	197,235
Interior private and mill elevators	5,846	6,168	6,928
Interior terminal elevators	10,446	14,279	15,000
Vancouver-New Westminster elevators	11,340	6,184	10,880
Victoria elevator	-	148	239
Prince Rupert elevator	487	-	53
Churchill elevator	1,997	2,048	2,516
Fort William-Port Arthur elevators	42,757	33,849	54,557
Storage afloat (Lakehead)	-	-	195
In transit - lake	-	6,262	-
In transit - rail	20,493	28,997	8,222
Eastern elevators	19,271	29,977	50,904
Storage afloat (Eastern Division)	1,699	-	8,066
Eastern mills (mill bins only)	2,446	2,343 <u>2/</u>	2,796
Western mills (mill bins only)	334	354 <u>2/</u>	313
Totals, in Canada	460,764	604,297	740,563
<u>In United States</u>	5,099	2,038	609
Totals, in Canada and United States ..	465,863	606,335	741,172

1/ Stocks other than on farms and in mills compiled by the Statistics Branch, Board of Grain Commissioners for Canada, as at the close of business on March 27, 1952, April 1, 1953 and March 31, 1954.

2/ Revised.

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
	24	164,969	1,152,269	990,670	2,307,908	5,392,904
	31	196,322	1,274,338	1,402,072	2,872,732	2,690,094
April	7	154,978	1,370,386	978,974	2,504,338	2,849,847
	14	213,172	2,066,101	1,407,898	3,687,171	5,671,584
Totals		26,627,765	163,199,766	82,745,238	272,572,769	352,889,684

Farmers' Marketings by Crop Districts 1952-53 Farmers in the Prairie Provinces and certain areas of British Columbia and Ontario marketed 536.0 million bushels of wheat during the 1952-53 crop year according to revised figures compiled by the Statistics Branch of the Board of Grain Commissioners.

In the following tables, farmers' deliveries are shown by the marketing channel employed, i.e., through country elevators, directly to interior private and mill elevators, etc. Deliveries to country elevators are, in turn, broken down by provinces and crop districts.

Farmers' Marketings of Wheat in the Western Division, 1952-53

Marketing Channel	Total Wheat
Country elevators	529,225,328
Platform loadings	499,017
Interior public and semi-public terminals	12,867
Interior private and mill elevators	6,204,959
From farms direct to U.S.A. by truck <u>1/</u>	46,337
Total	535,988,508

1/ Customs returns, Dominion Bureau of Statistics.

Farmers' Marketings through Country Elevators, 1952-53

Province and District	Wheat (Other than Durum)	Durum Wheat	Total Wheat
- bushels -			
<u>Manitoba</u>			
Crop District 1	2,219,912	110,452	2,330,364
2	5,261,237	186,629	5,447,866
3	9,149,614	1,177,078	10,326,692
4	1,381,111	61,665	1,442,776
5	1,891,796	196	1,891,992
6	263,721	192	263,913
7	5,730,034	43,481	5,773,515
8	3,897,945	79,971	3,977,916
9	3,168,199	41,049	3,209,248
10	3,935,696	3,112	3,938,808
11	3,084,613	796	3,085,409
12	1,298,547	557	1,299,104
13	1,847,862	19	1,847,881
14	571,178	63	571,241
Totals	43,701,465	1,705,260	45,406,725
<u>Ontario</u>			
Country elevators in the Western Division	5,735	-	5,735
Totals	43,707,200	1,705,260	45,412,460

Farmers' Marketings through Country Elevators, 1952-53

Province and District	Wheat (Other than Durum)	Durum Wheat	Total Wheat
- bushels -			
<u>Saskatchewan</u>			
Crop District 1A	6,855,827	107,936	6,963,763
1B	7,995,739	19,417	8,015,156
2A	14,428,118	130,284	14,558,402
2B	26,736,258	1,014,974	27,751,232
3AN	12,328,035	583,444	12,911,479
3AS	18,346,422	894,230	19,240,652
3BN	22,474,919	844,123	23,319,042
3BS	13,666,508	728,338	14,394,846
4A	4,766,111	78,269	4,844,380
4B	12,851,932	811,163	13,663,095
5A	18,919,605	13,116	18,932,721
5B	19,324,599	2,715	19,327,314
6A	33,992,032	422,235	34,414,267
6B	25,529,332	122,922	25,652,254
7A	23,742,866	282,320	24,025,186
7B	14,928,186	3,240	14,931,426
8A	12,287,241	897	12,288,138
8B	19,180,406	-	19,180,406
9A	19,395,218	3,369	19,398,587
9B	15,935,957	9	15,935,966
Totals	343,685,311	6,063,001	349,748,312
<u>Alberta</u>			
Crop District 1	16,763,473	214,448	16,977,921
2	10,576,735	1,233	10,577,968
3	6,201,665	94,918	6,296,583
4	15,749,319	106,223	15,855,542
5	10,270,730	13,003	10,283,733
6	18,043,559	-	18,043,559
7	13,562,394	-	13,562,394
8	9,011,992	483	9,012,475
9	626,776	4,039	630,815
10	13,756,940	320	13,757,260
11	3,197,270	510	3,197,780
12	411,892	-	411,892
13	3,604,752	-	3,604,752
14	4,412,669	-	4,412,669
15	1,256,876	-	1,256,876
16	4,642,833	-	4,642,833
Totals	132,089,875	435,177	132,525,052
British Columbia	1,539,504	-	1,539,504
Totals Marketed	521,021,890	8,203,438	529,225,328

Visible Supply of Canadian Wheat, April 14, 1954, Compared with
Approximately the same Date, 1952 and 1953

Position	1952	1953	1954
- thousand bushels -			
Country elevators - Manitoba	7,931	8,797	23,568
Saskatchewan	47,857	82,465	115,971
Alberta	24,506	49,403	54,696
Totals	80,294	140,664	194,235
Interior private and mill	5,935	6,351	7,313
Interior terminals	9,401	14,891	15,042
Vancouver-New Westminster	10,763	6,224	10,040
Victoria	-	18	288
Prince Rupert	65	463	53
Churchill	1,997	2,094	2,516
Fort William-Port Arthur	30,438	23,523	54,675
Storage Afloat	-	-	195
In transit rail (Western Division)	16,066	22,387	8,499
Bay, Lake and Upper St. Lawrence ports	10,087	19,639	33,779
Lower St. Lawrence and Maritime ports	11,450	16,868	19,168
Storage Afloat	1,038	-	4,385
In transit lake	7,160	11,700	-
In transit rail (Eastern Division)	3,117	4,503	825
United States ports	8,593	656	589
In transit U.S.A.	-	430	-
Totals	196,403	270,413	351,601

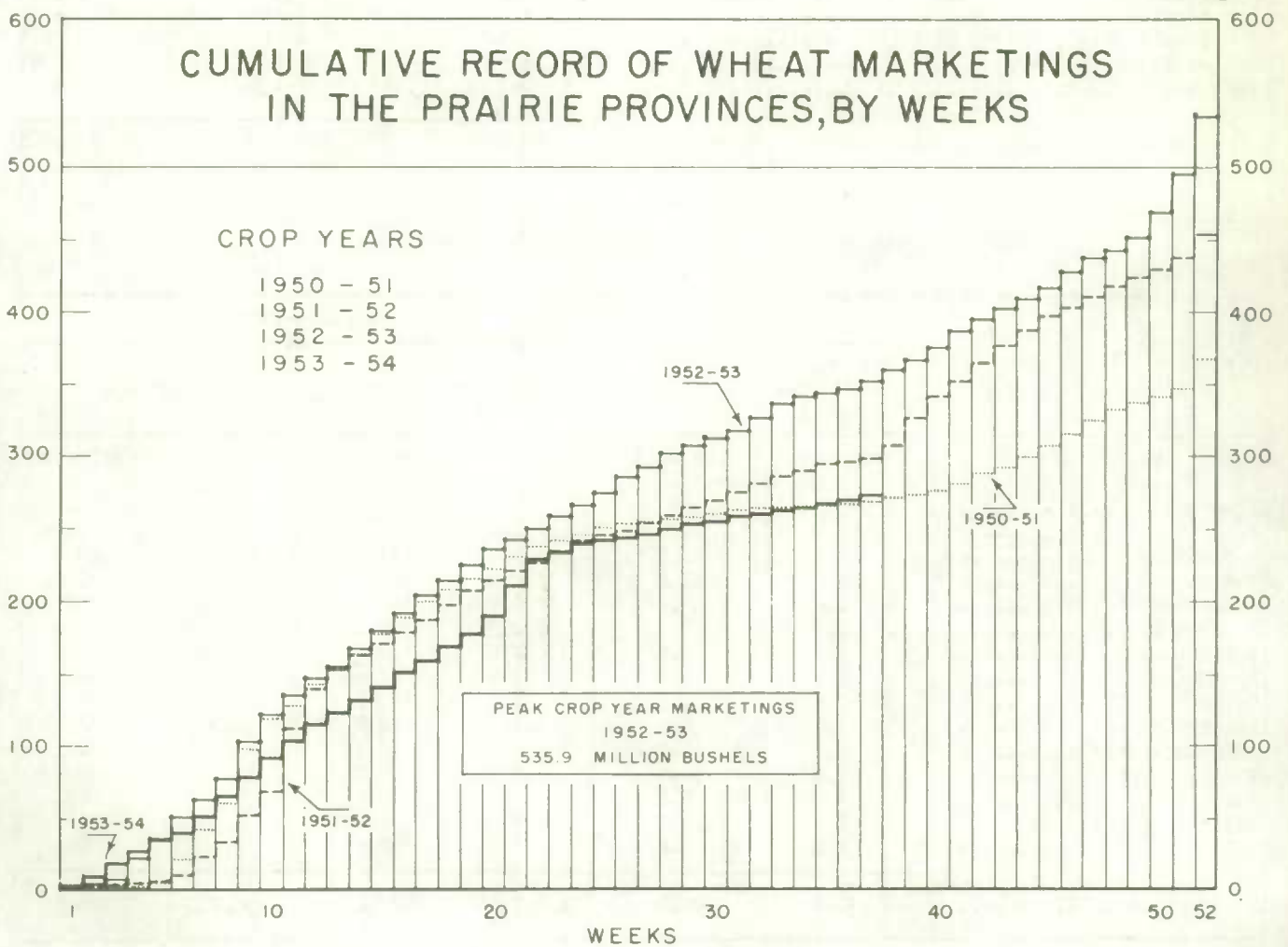
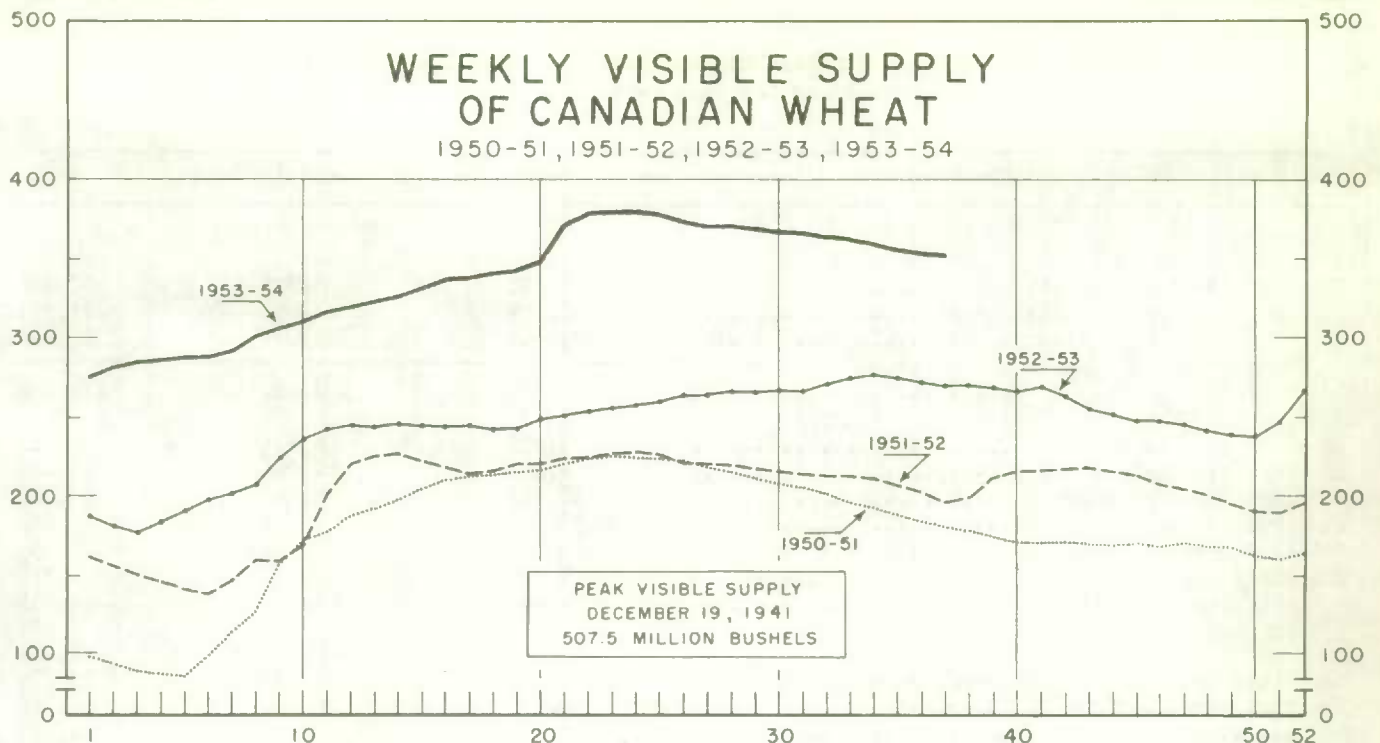
Grading of Wheat Inspected, August--March, 1953-54 with Comparisons

Grade	Crop Year		August--March			
	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	12,026	7.1	11,758	9.0
2 Northern	29.9	31.7	46,279	27.3	55,971	42.8
3 Northern	13.7	17.4	31,074	18.3	26,759	20.5
4 Northern	6.0	9.6	18,939	11.2	7,450	5.7
5 Wheat	5.7	10.4	18,273	10.8	7,853	6.0
6 Wheat	3.3	2.8	6,270	3.7	1,534	1.2
Feed Wheat	0.6	0.4	999	0.6	179	0.1
Garnet	0.9	0.5	903	0.5	635	0.5
Amber Durum	3.2	1.7	3,685	2.2	3,588	2.7
Alberta Winter	0.5	0.1	227	0.1	158	0.1
Toughs 2/ 3/	18.4	16.7	28,360	16.7	12,628	9.7
Damps 2/ 4/	3.8	0.1	281	0.2	72	0.1
Rejected 2/	0.6	1.0	1,673	1.0	1,482	1.1
All Others	1.1	0.4	753	0.4	643	0.5
Totals	100.0	100.0	169,791	100.0	130,710	100.0

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

MILLION BUSHELS

MILLION BUSHELS



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

Wheat Shipments* to the United States by Destination
August 1, 1953 to April 14, 1954
Compared with Approximately the Same Period 1951-52 and 1952-53

Destination	1951-52	1952-53	1953-54
- bushels -			
<u>By Vessel</u>			
Duluth-Superior	4,361,258	2,643,223	26,541
Milwaukee	298,326	-	15,940
Chicago	1,161,571	313,443	-
Huron	-	320,734	-
Erie	93,107	276,567	-
Buffalo	15,831,770	12,227,378	2,684,191
Oswego	514,005	1,418,950	-
Totals, Vessel	22,260,037	17,200,295	2,726,672
<u>By Rail</u>			
U.S.A. Seaboard Ports	1,903,416	633,765	16,534
Other U.S.A. Points	4,486,551	3,943,589	1,627,613
Totals, Rail	6,389,967	4,577,354	1,644,147
Totals, Shipments	28,650,004	21,777,649	4,370,819

*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 April 14, amounted to 4.4 million bushels, representing only a slight increase since the previous month. Shipments for the comparable periods of 1952-53 and 1951-52 amounted to 21.8 million and 28.7 million bushels, respectively.

Rail shipments of wheat to Maritime ports from Bay, Lake and Upper St. Lawrence ports during the first eight months of the current crop year amounted to 8.9 million bushels compared with 10.3 million shipped during the same period of 1952-53.

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

Ports	August 1, 1952 to March 31, 1953	August 1, 1953 to March 31, 1954
- bushels -		
Port McNicoll	3,147,409	3,469,474
Midland	4,590,991	3,494,417
Collingwood	226,996	797,448
Owen Sound	971,338	781,742
Goderich	99,760	240,278
Sarnia	630,857	-
Walkerville	-	145,082
Humberstone	30,000	-
Toronto	550,643	-
Prescott	26,650	-
Totals	10,274,644	8,928,441

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

Month	1950-51	1951-52	1952-53	1953-54
- bushels -				
August	122,532	283,914	191,711	191,336
September	123,256	435,068	1,181,046	236,030
October	73,543	159,667	936,757	173,043
November	133,848	465,193	651,957	138,440
December	1,517,624	1,387,828	464,914	347,824
January	4,394,047	5,839,567	6,550,958	510,486
February	3,303,248	3,618,007	9,566,151	368,662
March	3,476,161	1,564,586	6,285,944	553,518
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	15,359,217	14,303,297	26,594,524	

Rail shipments of wheat from the Lakehead during March 1954, at 553,518 bushels, represented the highest monthly level of the current crop year. It is noted, however, that shipments during March of 1953 amounted to some 6.3 million bushels. Cumulative rail shipments from the Lakehead for the period August, 1953 to March, 1954 inclusive amounted to 2.5 million bushels as against 25.8 million moving during the comparable period of the previous crop year.

Distribution of the March 1954 rail shipments of wheat from the Lakehead by grade and destination is shown in the table below, the bulk of the shipments, 406,212 bushels, went to destinations in Ontario, with Quebec accounting for an additional 96,150 bushels. Relatively smaller shipments went to destinations in New Brunswick, United States, Nova Scotia and Manitoba.

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

Grade	N.S.	N.B.	Que.	Ont.	Man.	U.S.A.
- bushels -						
1 Northern	-	-	2,000	12,000	-	-
2 Northern	-	-	10,000	12,000	-	-
4 Northern	-	-	4,500	211,000	-	-
5 Wheat	1,333	-	28,000	38,833	-	-
6 Wheat	-	-	-	-	-	6,000
Amber Durum	-	-	6,833	21,540	2,000	-
Tough	-	-	-	1,500	-	-
All others	9,500	22,323	44,817	109,339	-	12,000
Totals	10,833	22,323	96,150	406,212	2,000	18,000

Freight Assistance Shipments Claims filed for payment up to March 31, 1954, represent shipments of some 7.3 million bushels of wheat from the Prairie Provinces to Eastern Canada and British Columbia under the freight assistance plan during the first seven months of the 1953-54 crop year. During the same period of the 1952-53 crop year claims had been filed for some 8.4 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-February wheat shipments under the plan were running somewhat below those in 1952-53. Revised data on shipments during the first seven months of 1952-53 based on claims submitted up to March 31, 1954, place the total at 9.1 million bushels. The bulk of the current crop year's August-February shipments went to destinations in Ontario and Quebec, with British Columbia accounting for most of the remainder.

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

Month	Nfld.	P.E.I.	N.S.	N.B.	Que.	Ont.	B.C.	Total
- thousand bushels -								
August, 1953	6	21	61	41	393	403	237	1,160
September	8	10	64	43	474	292	217	1,108
October	10	7	59	38	379	462	226	1,182
November	13	3	52	34	405	378	203	1,088
December	5	8	67	27	366	394	217	1,084
January, 1954	10	11	66	43	338	363	138	970
February	2	13	42	26	321	282	46	733
Totals 1/	54	74	411	253	2,675	2,573	1,283	7,324
Same period 1952-53:								
Preliminary 2/	56	129	469	308	3,103	3,125	1,245	8,434
Revised 1/	62	134	490	322	3,231	3,286	1,537	9,062

Preliminary data on millfeed shipments under the freight assistance plan, indicate shipments of 257,730 tons during the August-February period of 1953-54. This total, based on claims filed up to March 31, 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 March 31, 1953, claims had been filed for only 286,225 tons out of a total of 323,629 tons shipped during the first seven 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,
1952-53 and 1953-54

Province	August-February		
	1952-53		1953-54
	Preliminary 2/	Revised 1/	Preliminary 1/
- tons -			
Newfoundland	2,047	2,282	2,171
Prince Edward Island	4,218	4,506	2,787
Nova Scotia	22,098	23,561	19,312
New Brunswick	19,962	21,240	17,190
Quebec	138,399	149,430	122,643
Ontario	77,787	93,361	68,720
British Columbia	21,714	29,249	24,907
Totals	286,225	323,629	257,730

1/ Based on claims filed up to March 31, 1954.

2/ Based on claims filed up to March 31, 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 -					
<u>1951-52</u>					
August	16,921	2,240	2,581	21,742	27,182
September	16,726	2,376	3,151	22,253	22,161
October	23,764	3,830	3,851	31,445	24,212
November	29,830	5,687	4,033	39,550	34,671
December	12,075	4,701	3,683	20,459	37,347
January	14,382	1,620	3,407	19,409	18,523
February	16,010	2,574	4,180	22,764	18,472
March	15,876	1,215	5,354	22,445	21,904
April	16,657	3,342	4,389	24,387	30,516
May	35,550	2,725	5,735	44,010	38,138
June	33,770	4,554	6,101	44,425	40,894
July	34,478	3,818	4,639	42,935	44,782
Totals	266,039	38,683	51,103	355,825	358,803
<u>1952-53</u>					
August	26,089	2,559	4,031	32,679	38,946
September	21,208	3,312	4,891	29,411	27,326
October	24,106	2,950	5,474	32,530	35,611
November	34,339	3,677	5,647	43,663	36,052
December	21,777	2,883	5,146	29,806	44,468
January	17,518	1,206	3,443	22,167	23,562
February	13,135	847	3,603	17,585	18,220
March	11,220	915	4,724	16,858	15,466
April	19,019	1,341	4,508	24,867	20,061
May	40,179	1,476	6,247	47,902	35,963
June	37,390	1,617	4,880	43,887	51,752
July	40,149	115	3,906	44,170	41,498
Total	306,129	22,897	56,501	385,527	388,926
<u>1953-54 ^{5/}</u>					
August	24,152	569	3,724	28,445	34,113
September	20,672	198	3,365	24,235	22,736
October	22,072	258	3,371	25,701	29,731
November	18,815	1,549	4,052	24,417	23,696
December	12,857	795	4,103	17,755	23,423
January	13,416	409	3,962	17,788	17,352
February	10,273	287	3,126	13,686	17,134
March	14,079	167	4,634	18,881	15,618
Totals	136,338	4,233	30,338	170,909	183,802

^{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	December	March		August—March	
	Wheat Flour 1/2/	Wheat Flour 2/	Wheat 3/	Wheat Flour 2/	Wheat 3/
			- bushels -		
COMMONWEALTH COUNTRIES					
United Kingdom	1,386,247	1,485,319	4,141,174	9,671,913	46,204,377
Africa					
Gambia	459	3,672	-	17,253	-
Gold Coast	111,879	34,646	-	639,527	-
Nigeria	39,397	25,029	-	340,726	-
Sierra Leone	6,768	9,693	-	66,919	-
Union of South Africa	-	-	1,115,572	-	4,416,772
Asia					
Ceylon	-	242,829	-	242,829	-
Hong Kong	107,901	49,459	-	765,045	-
India	-	-	-	-	4,272,138
Malaya and Singapore	19,580	31,136	-	254,439	-
Europe					
Gibraltar	-	13,882	-	102,024	-
Malta	-	-	-	-	1,084,533
North America					
Bahamas	24,597	28,161	-	187,956	-
Barbados	64,382	29,983	-	305,613	833
Bermuda	9,297	10,327	-	77,355	-
British Honduras	2,493	2,273	-	38,534	-
Jamaica	246,285	212,562	-	1,427,377	2,490
Leeward and Windward Islands .	91,512	66,114	-	618,921	-
Trinidad and Tobago	249,030	323,262	-	1,443,352	-
South America					
British Guiana	83,516	125,150	-	889,583	-
Totals, Commonwealth Countries	2,443,343	2,693,497	5,256,746	17,089,366	55,981,143

FOREIGN COUNTRIES

Africa					
Azores and Madeira	-	9,239	-	39,861	-
Belgian Congo	39,398	38,786	-	462,353	9,186
Canary Islands	-	-	-	918	-
Egypt	-	-	-	4,599	-
French Africa	1,026	-	-	6,124	-
Liberia	891	652	-	4,126	-
Libya	-	-	-	-	308,000
Morocco	11,331	5,053	-	273,339	-
Portuguese East Africa	1,769	1,768	56,560	6,223	341,786
Portuguese West Africa	3,852	8,163	-	26,181	-
Spanish Africa	-	-	-	14,148	-
Asia					
Arabia	11,142	1,372	-	97,474	-
Indonesia	22,455	-	-	69,746	-
Israel	1,516	-	-	3,060	2,609,064
Japan	86,179	98,060	3,188,724	891,302	28,617,423
Korea	-	-	-	953,046	-
Lebanon	20,502	2,011	-	85,257	-
Philippine Islands	542,925	547,326	-	3,442,478	-
Portuguese Asia	2,295	2,295	-	13,532	-
Syria	-	54	-	135	-
Taiwan (Formosa)	-	-	-	-	79,707
Thailand	9,751	25,808	-	211,316	-

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

Destination	December	March		August—March	
	Wheat Flour 1/2/	Wheat Flour 2/	Wheat 3/	Wheat Flour 2/	Wheat 3/
	- bushels -				
<u>Europe</u>					
Austria	-	-	-	-	350,000
Belgium	-	-	1,403,444	-	10,061,859
Denmark	-	-	-	1,125	878,700
France	-	4,041	-	4,545	709,334
Germany, Federal Republic of	-	56,664	1,695,755	365,994	10,921,629
Iceland	14,472	6,466	-	150,439	-
Ireland	-	-	-	-	1,801,221
Italy	6,665	12,645	-	163,143	364,550
Netherlands	-	-	205,333	16,047	5,172,203
Norway	-	6,241	204,493	50,737	2,044,624
Portugal	13,896	-	-	-	354,667
Spain	-	-	-	-	3,424,966
Switzerland	-	-	1,051,046	-	7,003,629
Yugoslavia	1,606	1,606	-	17,338	-
<u>North America</u>					
Alaska	-	-	-	4	-
Costa Rica	51,921	33,174	16,667	269,370	23,334
Cuba	123,241	124,817	181,114	510,485	1,066,061
Dominican Republic	36,806	36,257	-	283,581	-
El Salvador	42,647	32,301	-	204,867	-
French West Indies	914	54	-	4,027	-
Guatemala	43,754	20,047	-	303,007	-
Haiti	102,285	30,011	-	435,911	-
Honduras	1,377	918	6,667	13,653	6,667
Mexico	-	-	-	549	-
Netherlands Antilles	27,882	25,497	-	153,347	-
Nicaragua	43,133	46,233	-	217,296	-
Panama	31,311	30,893	-	220,113	-
St. Pierre and Miquelon	1,768	3,245	-	12,663	-
<u>United States</u>					
Flour in terms of wheat	2,524	18,468	-	47,709	-
For milling in bond 4/	-	-	-	-	1,402,244
For domestic use 4/	-	-	167,378	-	2,830,936
Virgin Islands	-	2,295	-	9,180	-
<u>South America</u>					
Bolivia	3,442	4,842	-	17,626	846,120
Brazil	-	-	380,800	1,440	380,800
Colombia	66,024	41,967	-	443,304	562,876
Ecuador	3,407	-	59,734	41,031	898,400
Peru	5,733	7,110	372,400	24,084	1,514,151
Surinam	12,447	18,104	-	126,140	-
Venezuela	274,756	636,030	-	2,534,522	5,480
Totals, Foreign Countries	1,667,043	1,940,513	8,990,115	13,248,495	84,589,617
Totals, All Countries	4,110,386	4,634,010	14,246,861	30,337,861	140,570,760

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

2/ In terms of wheat equivalent. Source: Canadian Customs returns.

Conversion rate: 4 1/2 bushels of wheat equal 1 barrel of 196 pounds of wheat flour.

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

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

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

Class and Grade	Week ending				
	March 26	April 2	April 9	April 16	April 23
- cents and eighths per bushel -					
<u>Initial Payment to Producers</u>					
1 Northern	140	140	140	140	140
2 Northern	137	137	137	137	137
3 Northern	134	134	134	134	134
4 Northern	126	126	126	126	126
5 Wheat	112	112	112	112	112
6 Wheat	106	106	106	106	106
Feed Wheat	100	100	100	100	100
1 C.W. Garnet	134	134	134	134	134
2 C.W. Garnet	131	131	131	131	131
1 Alberta Red Winter	137	137	137	137	137
2 Alberta Winter	134	134	134	134	134
1 C.W. Amber Durum	150	150	150	150	150
2 C.W. Amber Durum	147	147	147	147	147
3 C.W. Amber Durum	140	140	140	140	140
<u>International Wheat Agreement</u> <u>and Domestic Sales</u>					
1 Northern	180/3	181/4	181/6	182/1	182/6
2 Northern	175/3	176/4	176/6	176/5	176/6
3 Northern	172/3	173/4	173/6	174/1	174/6
4 Northern	166/3	167/4	167/6	168/1	168/6
5 Wheat	163/3	164/4	164/6	165/1	165/6
6 Wheat	162/3	163/4	163/6	164/1	164/6
Feed Wheat	158/3	159/4	159/6	160/1	160/6
1 C.W. Garnet	172/3	173/4	173/6	174/1	173/1
2 C.W. Garnet	169/3	170/4	170/6	171/1	170/1
3 C.W. Garnet	163/3	164/4	164/6	165/1	165/6
1 Alberta Red Winter	175/3	176/4	176/6	176/5	176/6
2 Alberta Winter	172/3	173/4	173/6	174/1	174/6
3 Alberta Winter	168/3	169/4	169/6	170/1	170/6
1 C.W. Amber Durum 1/	199/3	200/4	200/6	201/1	201/6
2 C.W. Amber Durum 1/	197/3	198/4	198/6	199/1	199/6
3 C.W. Amber Durum 1/	196/3	197/4	197/6	198/1	198/6
<u>Export - Class II</u>					
1 Northern	180/3	181/4	181/6	182/1	182/6
2 Northern	175/3	176/4	176/6	176/5	176/6
3 Northern	172/3	173/4	173/6	174/1	174/6
4 Northern	166/3	167/4	167/6	168/1	168/6
5 Wheat	163/3	164/4	164/6	165/1	165/6
6 Wheat	162/3	163/4	163/6	164/1	164/6
Feed Wheat	158/3	159/4	159/6	160/1	160/6
1 C.W. Garnet	172/3	173/4	173/6	174/1	173/1
2 C.W. Garnet	169/3	170/4	170/6	171/1	170/1
3 C.W. Garnet	163/3	164/4	164/6	165/1	165/6
1 C.W. Amber Durum	282	282	282	280	278
2 C.W. Amber Durum	280	280	280	278	276
3 C.W. Amber Durum	279	279	279	277	275

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

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

Class and Grade	Week ending				
	March 26	April 2	April 9	April 16	April 23
- cents and eighths per bushel -					
<u>Initial Payment to Producers</u>					
1 Northern	140	140	140	140	140
2 Northern	137	137	137	137	137
3 Northern	134	134	134	134	134
4 Northern	126	126	126	126	126
5 Wheat	112	112	112	112	112
6 Wheat	106	106	106	106	106
Feed Wheat	100	100	100	100	100
1 C.W. Garnet	134	134	134	134	134
2 C.W. Garnet	131	131	131	131	131
1 Alberta Red Winter ...	137	137	137	137	137
2 Alberta Winter	134	134	134	134	134
1 C.W. Amber Durum	150	150	150	150	150
2 C.W. Amber Durum	147	147	147	147	147
3 C.W. Amber Durum	140	140	140	140	140
<u>International Wheat Agreement and Domestic Sales</u>					
1 Northern	187/3	188/4	188/6	189/1	189/6
2 Northern	183/3	184/4	184/6	184/5	184/6
3 Northern	178/3	179/4	179/6	180/1	180/6
4 Northern	172/3	173/4	173/6	174/1	174/6
5 Wheat	163/3	164/4	164/6	165/1	165/6
6 Wheat	162/3	163/4	163/6	164/1	164/6
Feed Wheat	158/3	159/4	159/6	160/1	160/6
1 C.W. Garnet	172/3	173/4	173/6	174/1	173/1
2 C.W. Garnet	169/3	170/4	170/6	171/1	170/1
3 C.W. Garnet	163/3	164/4	164/6	165/1	165/6
1 Alberta Red Winter ...	182/3	183/4	183/6	183/7	183/6
2 Alberta Winter	179/3	180/4	180/6	181/1	181/6
3 Alberta Winter	175/3	176/4	176/6	177/1	177/6
<u>Export - Class II</u>					
1 Northern	187/3	188/4	188/6	189/1	189/6
2 Northern	183/3	184/4	184/6	184/5	184/6
3 Northern	178/3	179/4	179/6	180/1	180/6
4 Northern	172/3	173/4	173/6	174/1	174/6
5 Wheat	163/3	164/4	164/6	165/1	165/6
6 Wheat	162/3	163/4	163/6	164/1	164/6
Feed Wheat	158/3	159/4	159/6	160/1	160/6
1 C.W. Garnet	172/3	173/4	173/6	174/1	173/1
2 C.W. Garnet	169/3	170/4	170/6	171/1	170/1
3 C.W. Garnet	163/3	164/4	164/6	165/1	165/6
1 Alberta Red Winter ...	182/3	183/4	183/6	183/7	183/6
2 Alberta Winter	179/3	180/4	180/6	181/1	181/6
3 Alberta Winter	175/3	176/4	176/6	177/1	177/6

CANADIAN FLOUR MILLING SITUATION

Production The production of Canadian wheat flour reported by Canadian mills for March 1954 amounted to 1,830,000 barrels, representing a slight increase from the February 1954 output of 1,718,000 barrels, but below both the March 1953 total of 1,967,000 barrels, and the ten-year (1943-44 to 1952-53) average March production of 2,083,000 barrels. Mills reporting operations during March 1954 had a total rated capacity of 96,908 barrels per 24-hour day, and on the basis of a 27-day working period 69.9 per cent of this rated capacity was effective.

Wheat milled for flour during the month amounted to 8.1 million bushels as against 7.6 million bushels milled during the preceding month and 8.8 million bushels milled during the same month last year. Of the wheat milled for flour during March, 1954 some 7.4 million bushels were Western Canadian Spring wheat (other than Durum). Most of the balance consisted of Ontario Winter wheat (526,000 bushels) and Durum wheat (81,000 bushels).

Exports According to preliminary Customs returns, exports of Canadian wheat flour during March, 1954 amounted to 1,029,780 barrels (4,634,000 bushels of wheat equivalent), representing an increase of 48 per cent over those of the preceding month. Flour shipments during the month went to fifty-five countries and colonies, with the United Kingdom accounting for 1.5 million bushels of wheat equivalent or 32 per cent of the total. Other countries receiving shipments in excess of one hundred thousand bushels, were as follows, in thousands of bushels: Venezuela (636); Philippine Islands (547); Trinidad and Tobago (323); Ceylon (243); Jamaica (213); British Guiana (125); Cuba (125).

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

Crop Year	Wheat Milled for Flour	Wheat Flour	
		Production	Exports ^{1/}
	- bushels -	- barrels of 196 pounds -	
1935-36—1939-40 average	67,845,114	15,002,781	4,899,970
1940-41—1944-45 average	99,704,638	22,402,166	12,091,605
1945-46	118,074,774	26,435,341	14,470,177
1946-47	127,775,176	28,588,456	16,896,233
1947-48	109,822,011	24,159,696	13,661,573
1948-49	90,896,984	20,379,997	10,687,561
1949-50	90,082,917	20,259,200	10,151,090
1950-51	106,748,343	23,630,180	12,426,996
1951-52	104,494,021	22,842,441	11,356,288
1952-53	106,727,237	23,865,625	12,555,714
1953-54 ^{2/}			
August	6,345,959	1,423,693	827,588
September	7,692,345	1,742,629	747,741
October	8,420,739	1,909,488	749,098
November	8,216,541	1,866,563	900,514
December	8,018,819	1,815,315	911,726
January	7,350,931	1,661,799	880,532
February	7,567,133	1,717,646	694,768
March	8,099,356	1,829,768	1,029,780
Totals	61,711,823	13,966,901	6,741,747
Same period 1952-53 (revised)	71,313,258	15,915,026	8,213,212

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

^{2/} Subject to revision.

UNITED STATES SITUATION

Supply Position Total estimated supplies of wheat in the United States for the 1953-54 crop year amount to some 1,733.9 million bushels, consisting of a carryover of 562.5 million, the 1953 crop of 1,168.5 million and July-March imports of 2.9 million bushels of Canadian wheat. According to the April 26 issue of 'The Wheat Situation' domestic disappearance for the year ending June 30, 1954 is now estimated at 661 million bushels. This includes about 490 bushels for food use (continental United States civilian, territories and military), about 100 million for feed and 71 million for seed. The estimate for food use is about the same as the 489 million bushels consumed in 1952-53. Feed use at 100 million is below the 120 million bushels in 1952-53 but is above the 92 million bushels in 1951-52. The amount available for export and for carryover during 1953-54 at 1,072.9 million bushels, exceeds by some 23 per cent the 873.6 million available during 1952-53.

United States Wheat Supplies

Item	1952-53	1953-54 <u>1/</u>
	- million bushels -	
Carryover at beginning of crop year (July 1)	255.7	562.5
New crop	1,291.4	1,168.5
Total estimated domestic supplies	1,547.1	1,731.0
Imports of wheat for domestic use, July-March	18.5	2.9
Total estimated supplies <u>2/</u>	1,565.6	1,733.9
Less estimated domestic requirements for crop year <u>3/</u>	692.0	661.0 <u>4/</u>
Available for export and for carryover	873.6	1,072.9
Deduct:		
Exports of wheat as grain, July-March	222.2	126.6
Exports of wheat flour and products in terms of wheat, July-March	31.3	23.2
Total exports of wheat, wheat flour and products	253.5	149.8
Balance on April 1 for export and for carry over	620.1	923.1

1/ Preliminary.

2/ Excluding imports for April-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.

4/ Revised.

Total exports of wheat, wheat flour and products during the period under review amounted to 149.8 million bushels as against the comparable total of 253.5 million a year ago. The balance remaining on April 1 for export and for

carryover was estimated at 923.1 million bushels, some 303.0 million greater than the total available at the same date in 1953. If the present rate of export shipments is maintained through June, exports for the 1953-54 year will total about 200 million bushels. A total disappearance of 861 million bushels (domestic requirements of 661 million and exports of 200 million bushels) indicates a carryover at July 1, 1954 in the vicinity of 875 million bushels, far above the record of 631 million at July 1, 1942.

April Winter The April 26 issue of 'The Wheat Situation' places the 1954 winter
Wheat Crop wheat crop at 678 million bushels. This would be 23 per cent smaller
Estimate than the 1953 crop of 877.5 million bushels, and 19 per cent below
 average. Declines from the prospective production as of December 1
in the important Great Plains wheat area have more than offset generally improved
prospects in most other areas. This has resulted in a decline of 72 million bushels
from the forecast on December 1. The current forecast is based upon an appraisal
of the April 1 condition of wheat as reported by individual growers, and upon soil
moisture reserves and other factors affecting crop production.

The total abandonment and diversion to uses other than grain for the Nation is now indicated at 9.0 million acres, 19.3 per cent of the total acreage seeded for all purposes last fall. Of this total, 7.2 million acres are in Texas, Oklahoma, Kansas, New Mexico, and Colorado. Last year 10.2 million acres, or 17.9 per cent of the total, were lost and diverted. The forecast of yield, at 14.6 bushels per seeded acre, compares with 15.4 bushels in 1953 and 18.7 bushels in 1952. The average yield during 1943-1952 was 15.7 bushels per seeded acre.

Over most of the eastern half of the country, the open winter, together with mostly adequate precipitation for plant development, largely made up for the effects of below normal precipitation at seeding time last fall. Prospects for winter wheat production have improved in most States in this area. For a number of the important winter wheat States west of the Mississippi River, below normal winter precipitation and several dust storms have resulted in sharply lower production prospects. The wheat crop in New Mexico, northwestern Texas, extreme western Oklahoma, southwestern Kansas, and southeastern Colorado has been most severely damaged by lack of rainfall and by late February and March dust storms. In this large area, considerable acreage has already been abandoned and whether the remaining acreage produces grain depends upon timely rainfall.

Rains since April 1 have temporarily relieved drought conditions in most of Texas and Oklahoma, but little relief to dry conditions occurred in New Mexico, the extreme northern part of the Panhandle of Texas, the Oklahoma Panhandle, southeastern Colorado, and western Kansas. The outlook continues favourable throughout the soft winter wheat region and in the soft white territory of the Pacific Northwest.

Amber Durum Wheat The total supply of Amber Durum wheat for the 1953-54
in Short Supply marketing year is estimated to be 19.9 million bushels,
 compared with 33.9 million bushels for 1952-53 and an
average of 50.5 million bushels for the five years 1948-49 through 1952-53. As
the result of declining production and steadily increasing market demands for this
class of wheat during recent years, the estimated carryover stocks at the beginning
of the 1954-55 marketing year may be around 3 million bushels—the smallest since
the severe drought years of the 1930's. This compares with a little over 6 million

bushels in 1953 and the 5-year average of nearly 17 million. Excessive rust damage reduced average yields to 6.2 bushels per seeded acre in 1953, compared with 12.0 bushels for the 5-year average.

Wheat Stocks on Farms According to a report released on April 9, the Crop Reporting Board of the Agricultural Marketing Service, United States Department of Agriculture estimate that stocks of wheat on farms at April 1, 1954 amounted to 298 million bushels.

This has been exceeded only by the 321 million bushels in 1943. The current stocks represent 25.5 per cent of the 1953 crop. A year ago wheat stocks totalled 270 million bushels and the average for April 1 is 222 million bushels.

Disappearance of 126 million bushels from farms during the January—March quarter of 1954 compares with 132 million bushels in the same quarter of 1953 and the average for the quarter of 156 million bushels. Since last July 1, disappearance of wheat from farms totalled 944 million bushels, compared with 1,093 million bushels during the same period a year earlier.

The North Central States accounted for 203,716,000 bushels, or 68 per cent of the total U.S. farm stocks of wheat on April 1, 1954. Leading States for farm wheat stocks on April 1 were North Dakota with 59 million bushels, Montana with 40 million, Kansas with 36 million, Nebraska with 25 million, and South Dakota with 20 million bushels. Wheat stocks on farms in these States totalled over 180 million bushels, or 61 per cent of the total for the Nation.

Stocks of Wheat in All Positions April 1, 1954 According to a report issued on April 23, by the Agricultural Marketing Service, United States Department of Agriculture, Stocks of 1,128 million bushels of wheat stored in all positions on April 1, 1954 are the largest for that date in the twenty year period of comparable estimates. This total is one-fourth larger than the previous record holdings of April 1, 1943, one-third larger than stocks a year earlier and more than double stocks on April 1, 1952. Current stocks are smaller than those of January 1, 1954 by 205 million bushels, or 15 per cent. In bushels, this is the smallest decline for the January—March quarter since 1942.

Off-farm wheat stocks of 830 million bushels are the largest of record for April 1, while the farm stocks of 298 million bushels are the second largest of record. Compared with a year earlier farm stocks are 11 per cent larger and the off-farm stocks 45 per cent larger.

The record large off-farm total includes 316 million bushels at terminals and 379 million bushels in interior mills, elevators and warehouses; each is the largest of record for the date in that position. Wheat held in merchant mills totalled 105 million bushels, 3 per cent more than a year earlier and exceeded on April 1 only in 1942 and 1943. The Commodity Credit Corporation on April 1 had 30.4 million bushels of wheat stored in bins under CCC control, aboard ships of the "mothball fleet", and in transit to ports. This is nearly 3 million bushels more than the quantity thus held on January 1, 1954 and the largest for April 1 since 1944. Other government-owned wheat is included in the estimates for the position where stored.

C.C.C. Commodity Credit Corporation loans for financing new storage construction
Storage are available to farmers through local banks or direct from the local
Plans county Agricultural Stabilization and Conservation Committee. These
loans, which can run up to 80 per cent of the cost of the new storage facilities in most States, can be paid off over a four-year period. The loans, at 4 per cent interest, are intended to supplement local credit services when for any reason normal lending agency credit is not available. In 1953, around 30 million bushels of farm storage capacity were added under this program.

Commodity Credit Corporation loans are also available to farmers for financing the purchase of drying equipment for the conditioning of storable crops. The drying equipment includes mobile mechanical dryers, air circulators, ventilators, tunnels, and fans. The loans, which are available through the same local sources as the storage loans, can be used to meet up to 75 per cent of the delivered and assembled cost of the equipment.

During the past year the CCC has awarded contracts for the purchase of 16,520 grain storage structures—with a total capacity of approximately 96,211,600 bushels—for erection on CCC bin-sites in Illinois, Iowa, Kansas, Michigan, Minnesota, Nebraska, South Dakota, and Wisconsin. This brought CCC bin-site storage capacity, which is used when adequate commercial storage is not available, to a total of approximately 635 million bushels. Recently, the CCC has awarded contracts for an additional 100 million bushels, bringing the total up to 735 million bushels.

In addition the CCC made arrangements with the U.S. Maritime Administration for the emergency storage of grains in 125 ships of the Maritime Administration's Reserve Fleet. These ships—75 at Jones Point, New York, and 50 on the James River, Virginia—have provided storage for approximately 28 million bushels of wheat.

Preparations have recently been completed for the use of an additional 180 ships this year, consisting of 130 ships in the Pacific Northwest and 50 additional ships on the James River. These additions will provide CCC with new emergency ship storage for approximately 40 million bushels of grain, thus opening up an equal quantity of commercial storage for use by farmers and other commercial users.

Reseal Program Farmers in many areas who have 1953 crop farm-stored wheat
For Farm under price support will be eligible to reseal their wheat. The
Stored Wheat reseal period is from May 1, 1954 to March 31, 1955. Farmers
will receive a storage payment equivalent to rates paid to commercial warehousemen under the 1954 Uniform Grain Storage Agreement. The reseal program is designed to retain wheat in storage near the original point of production and to ease warehouse storage pressures. Producers holding wheat on their farms for another year earn a storage fee that will also help to pay the cost of new facilities.

Wheat producers who resealed their 1952 crop under loans to mature April 30, 1954, may continue their reseal program. The 1952-crop reseal program now extends over eight States and will mature April 30, 1954. Farmers are encouraged to keep this wheat in farm storage by extending the loans to mature eleven months later on March 31, 1955.

Cash Wheat Prices on the Kansas City and Minneapolis Markets

No. 2 Hard Winter, Kansas City			No. 1 Northern Spring, Minneapolis		
Date	Price		Date	Price	
	cents per bushel			cents per bushel	
April 1, 1954	241	- 246	April 1, 1954	237 7/8	- 238 7/8
2	242 1/4	- 252 1/2	2	237 3/8	- 238 3/8
5	240 1/4	- 247 1/2	5	235 3/4	- 236 3/4
6	240	- 246	6	235 1/8	- 236 1/8
7	246 1/4	- 248 1/4	7	236 1/8	- 237 1/8
8	245	- 251	8	238 1/2	- 239 1/2
9	245 1/2	- 246	9	238 1/8	- 239 1/8
12	239	- 243	12	235 5/8	- 236 5/8
13	239 1/2	- 245 3/4	13	235	- 236
14	239	- 249	14	233 7/8	- 234 7/8
15	241 1/4	- 245 1/2	15	233	- 234
16	Good Friday		16	Good Friday	
19	241 1/4	- 257	19	235 3/8	- 236 3/8
20	241 1/2	- 246 1/2	20	237 1/4	- 238 1/4
21	247 1/2	- 250	21	237 1/8	- 238 1/8
22	246 1/4		22	236 1/2	- 237 1/2
23	242 1/2	- 246 1/4	23	236 3/4	- 238 3/4
26	241 3/4	- 248	26	237 1/4	- 239 1/4
27	239 1/2	- 263	27	233 1/2	- 236 1/2
28	238 3/4	- 262 1/4	28	234 1/2	- 236 1/2
29	240 3/4	- 246	29	238 1/4	- 240 1/4

Chicago Wheat Futures, High Points of Closing

Date	May	July	September	December
	- cents and eighths per bushel -			
April 1, 1954	219/6	214/7	217	221/2
2	220/7	216/1	218/1	222/3
5	217/5	218/2	216/2	220/4
6	215/1	213	215/3	219/4
7	215/7	214/5	217	221/2
8	218/4	217/1	219/6	223/7
9	216/7	216/2	219/3	223/5
12	213/2	213/1	216/2	221
13	214/4	214	217/4	222
14	213/5	213	215/5	220/3
15	212/1	209/5	213	217/7
16		Good Friday		
19	215	212/6	216/1	221
20	214/2	211	214/1	218/7
21	215	209/7	213/2	218
22	213/1	207/1	210/1	214/6
23	213/1	206/3	209/4	214
26	212/6	208/2	211/6	216/5
27	205/4	203/6	207/1	212/5
28	203	201/3	204/4	209/6
29	204/3	201/4	204/5	209/4
30	203/2	199/4	202/4	207/4

ARGENTINE SITUATION

Supply Position Total estimated supplies of wheat in the Argentine for 1953-54 now stands at 293.3 million bushels, consisting of a carryover of 72.8 million and the 1953 crop of 220.5 million (first official estimate). With estimated domestic requirements relatively unchanged from those of the preceding crop year, some 164.7 million bushels are available for export and for carryover during 1953-54 as compared with 154.8 million available during 1952-53.

Argentine Wheat Supplies

Item	1952-53	1953-54 ^{1/}
	- million bushels -	
Carryover at beginning crop year (December 1)	1.8	72.8
New crop	280.5 ^{2/}	220.5 ^{2/}
Total estimated domestic supplies	282.3	293.3
Imports of wheat for domestic use	-	-
Total estimated supplies	282.3	293.3
Less estimated domestic requirements for crop year	127.5 ^{2/}	128.6
Available for export and for carryover	154.8 ^{3/}	164.7 ^{3/}
Deduct:		
Exports of wheat as grain, December-March	6.0	34.3
Exports of wheat flour in terms of wheat, Dec.-March..	^{4/}	0.5
Total exports of wheat and wheat flour	6.0	34.8
Balance on April 1 for export and for carryover	148.8	129.9

^{1/} Preliminary.

^{2/} Revised.

^{3/} Includes 400,000 metric tons (14.7 million bushels) of wheat stored to constitute a reserve.

^{4/} 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 April 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 Rainfall appears to have been adequate over all but scattered sections of the entire grain zone during the second half of March and the first half of April. In most areas satisfactory progress is being made with ploughing for winter feed and alfalfa sowings. Corn picking is

proceeding in southern Santa Fé and northwestern Buenos Aires and recent cool dry weather has been excellent for conditioning the grain for shipment. Yields reported to date are satisfactory but not up to the expectations of some months ago. The small sunflower crop is reportedly in good condition. Prospects for rice continue favourable and a record crop is generally anticipated. Pastures are reportedly good to excellent everywhere except in Patagonia.

1953-54 Wheat Crop After a month or more of relative inactivity wheat sales improved markedly during the past few weeks. Since March 15 over 400,000 tons (14,697,000 bushels) have been sold of which 135,000 tons (4,960,000 bushels) are for Chile, 100,000 tons (3,674,000 bushels) for Brazil and 50,000 tons (1,837,000 bushels) for Poland. An estimated 115,000 tons (4,226,000 bushels) of the amount for Chile and the 100,000 tons (3,674,000 bushels) for Brazil are unofficially reported to be applicable against the 1953 agreements.

Argentina and Brazil are still negotiating the 1954 agreement and some indication of the price trend is given by the fact that the price reported for this recent sale is 95.00 dollars per ton (\$2.59 per bushel) which compares with 112.00 dollars (\$3.05 per bushel) paid by Brazil for the 1953 deliveries. Current prices to other destinations however range from about 59.00 dollars (\$1.61 per bushel) for payment in United States dollars to 70.00 dollars (\$1.91 per bushel) for payment in Chilean agreement dollars. Last year Brazil received over 1.1 million tons (40,418,000 bushels) of Argentine wheat and although she has this year purchased from other sources it seems likely that agreement will be reached and that Argentina will export substantial quantities to that country again this year.

Producer Prices It has been officially announced that Argentine producer prices
Unchanged for the 1954-55 crops of wheat, oats, barley, rye and flax will be the same as those prevailing during the current season.

Official Grain The first official estimate of the 1953-54 wheat crop places
Estimates production at 6 million metric tons (220.5 million bushels) 21 per cent less than the previous season's outturn according to the revised estimate for that year. Flaxseed production shows a serious decline, 40 per cent less than last year. Barley, rye and oats are all down from last year but well above recent averages. There is no official indication to date as to the extent of current corn production. The following tables give acreages and production figures for recent years:

Area Sown

Crop Year	Wheat	Corn	Flax	Oats	Barley	Rye
- thousand acres -						
1949-50	14,059	5,326	2,662	3,037	1,983	4,602
1950-51	16,189	6,024	2,686	3,237	2,218	5,412
1951-52	11,834	6,254	1,584	2,936	2,153	4,932
1952-53	14,982	8,285	2,519	4,204	2,737	6,133
1953-54	15,690	8,230	1,806	3,651	2,649	6,016

Production

Crop Year	Wheat	Corn	Flax	Oats	Barley	Rye
- thousand bushels -						
1949-50	189,010	32,927	26,605	35,021	18,137	10,909
1950-51	212,966	105,112	22,015	47,529	35,021	24,841
1951-52	77,162	80,311	12,338	28,400	15,446	3,197
1952-53	280,490	139,756	23,003	82,303	53,944	52,548
1953-54	220,462	-	13,684	62,248	38,075	25,306

Wheat Sales The sale was announced on April 9 of 251,000 tons (9,223,000 bushels) of wheat of which Chile purchased 135,000 tons (4,960,000 bushels) at 350 pesos per ton (\$1.91 per bushel) f.o.b. and Brazil 100,000 tons (3,674,000 bushels) at 475 pesos (\$2.59 per bushel). The balance of 16,000 tons (588,000 bushels) was sold for U.S. dollars at 294 pesos per ton (\$1.60 per bushel) and is reportedly destined for the United Kingdom or the continent. At the end of March 50,000 tons (1,837,000 bushels) were sold at 305 pesos per ton (\$1.66 per bushel) for payment in Polish agreement dollars. The price for Western German treaty dollars dropped to 300 pesos (\$1.63 per bushel) on the sale of 3,400 tons (125,000 bushels) on March 18 and for florins and Danish crowns to 307 pesos per ton (\$1.67 per bushel) f.o.b. In addition to the sales reported by I.A.P.I. the trade reports that 90,000 tons (3,307,000 bushels) of wheat have been bartered for approximately 15,000 tons of hessian cloth. The destinations of the wheat are said to be European countries other than Germany.

Grain Shipments March grain shipments aggregated 557,152 metric tons, making a total for the first quarter of the calendar year of 1,764,072 tons of which wheat accounted for over one-third and rye for nearly a quarter. Total shipments in the first three months of the year compare with 436,595 tons in the corresponding period of 1953. Germany was the principal destination for grains in the first quarter of the year with 379,221 tons. The Netherlands and Belgium followed with 305,939 tons and 232,390 tons, respectively. Shipments continue to be hindered by the inability of transport facilities to bring grains to port in sufficient volume to meet I.A.P.I. commitments. However, port congestion at the moment is not as severe as it has been.

March shipments amounted to 237,910 tons (8,742,000 bushels) of wheat, destined chiefly for Germany with 90,990 tons (3,343,000 bushels). Japan, the Netherlands and the United Kingdom followed with 31,492 tons (1,157,000 bushels), 30,632 tons (1,126,000 bushels) and 27,986 tons (1,028,000 bushels) in that order. Shipments to Brazil and Peru accounted for 14,606 tons (537,000 bushels) and 13,500 tons (496,000 bushels). Denmark, Paraguay and Belgium received 8,422 tons (309,000 bushels), 7,680 tons (282,000 bushels) and 5,345 tons (196,000 bushels), respectively, while Switzerland and France took the balance with 4,657 tons (171,000 bushels) and 2,600 tons (96,000 bushels).

Half of the month's rye shipments were destined for Poland which country received 82,174 tons (3,235,000 bushels) out of a total of 161,317 tons (6,351,000 bushels). Other destinations included the Netherlands 17,303 tons (681,000 bushels), Belgium 16,463 tons (648,000 bushels), Italy 16,203 tons

(638,000 bushels) and Denmark 15,265 tons (601,000 bushels). The balance was shipped to Finland, Switzerland, Norway and Germany with 10,042 tons (395,000 bushels), 2,400 tons (94,000 bushels), 967 tons (38,000 bushels) and 500 tons (20,000 bushels), respectively.

Corn shipments at 23,078 tons (909,000 bushels) were at their lowest since last May pending large scale deliveries of the new crop. The principal destinations were France with 8,470 tons (333,000 bushels), Germany with 5,800 tons (228,000 bushels) and Norway and the Netherlands with 2,585 tons (102,000 bushels) and 2,400 tons (94,000 bushels), respectively.

The Netherlands and Denmark accounted for the greater part of oats shipments in March with 41,311 tons (2,679,000 bushels) and 25,251 tons (1,637,000 bushels), respectively out of a total of 78,865 tons (5,114,000 bushels). Switzerland, Italy and Belgium received 5,438 tons (353,000 bushels), 4,265 tons (277,000 bushels) and 2,600 tons (169,000 bushels) in that order.

Barley shipments were destined mainly for the Netherlands and the United Kingdom with 19,453 tons (893,000 bushels) and 19,032 tons (874,000 bushels), respectively. The balance of the 55,982 tons (2,571,000 bushels) shipped during the month was destined for Belgium 7,002 tons (322,000 bushels), Austria 5,177 tons (238,000 bushels), Denmark 3,693 tons (170,000 bushels) and Italy 1,625 tons (75,000 bushels).

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

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

Destination	Wheat	Corn	Flax	Oats	Rye	Barley
- thousand bushels -						
Austria	-	-	-	136	-	316
Belgium	1,592	1,050	-	1,815	3,213	2,424
Brazil	3,494	-	-	9	-	-
Chile	184	-	-	-	-	-
Denmark	511	39	-	2,101	1,501	170
Finland	-	-	-	-	395	-
France	96	1,755	-	-	-	53
Germany	8,510	3,670	-	763	1,598	93
Hungary	-	-	-	143	864	358
Israel	-	-	-	-	404	-
Italy	18	402	-	625	3,831	104
Japan	2,169	-	-	-	-	-
Netherlands	2,282	646	-	6,364	2,311	3,241
Norway	-	591	-	-	38	-
Paraguay	364	-	-	-	-	-
Peru	1,196	-	-	-	-	-
Poland	-	-	-	-	3,491	-
South Africa	-	30	-	-	-	-
Switzerland	685	146	-	1,271	117	580
United Kingdom	2,603	1,017	-	-	227	1,706
United States	-	-	-	1,539	-	-
Totals	23,704	9,346	-	14,766	17,989	9,044
Same period:						
1953	5,736	6,792	-	1,080	543	3,559
1952	2,063	8,007	905	2,305	3,566	3,944
1951	29,261	369	3,278	1,310	1,677	276
1950	31,938	12,964	-	4,130	1,270	2,051
1949	22,686	13,760	-	1,265	1,215	1,872

AUSTRALIAN SITUATION

Supply Position Total estimated supplies of wheat in Australia for the 1953-54 crop year amount to some 235.0 million bushels, consisting of a carry-over of 36.0 million bushels and the 1953 crop placed at 199.0 million bushels. With domestic requirements estimated at 77.4 million bushels, some 157.6 million were available for export and for carryover during the current crop year compared with 136.4 million available during 1952-53.

Exports of wheat as grain during the period from December 1, 1953 to March 27, 1954 amounted to 8.8 million bushels as against 15.9 million during the comparable period of 1952-53. Exports of wheat flour in terms of wheat equivalent at 9.5 million bushels, were also below those for the corresponding period of the preceding crop year when some 13.4 million bushels were exported. Total exports of wheat and wheat flour in terms of wheat amounted to 18.3 million bushels representing a decline of some 11.0 million bushels below the comparable 1952-53 level. The balance remaining on March 28, 1954 for export and for carryover was estimated at 139.3 million bushels compared with 107.1 million available at approximately the same date in 1953.

Australian Wheat Supplies

Item	1952-53	1953-54 <u>1/</u>
	- million bushels -	
Carryover, including flour as wheat, at beginning of crop year (December 1)	18.0	36.0
New crop	195.2	199.0
Total estimated supplies	213.2	235.0
Less estimated domestic requirements for crop year ...	76.8	77.4
Available for export and for carryover	136.4	157.6
Deduct:		
Exports of wheat as grain, December 1 to March 27 ..	15.9	8.8
Exports of wheat flour in terms of wheat, December 1 to March 27	13.4	9.5
Total exports of wheat and wheat flour	29.3	18.3
Balance on March 28 for export and for carryover	107.1	139.3

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 April 15, 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 \$2.1880 (Canadian), the quotation in effect on March 19, 1954.

Wheat Acreage and Yield Although wheat growers have been told that it might be wise to cut back wheat production now and concentrate on a system of ley farming in view of the large surplus stocks of world wheat supplies, there is no indication, at present, of farmers' intentions to reduce wheat acreages for the coming season. New South Wales, the largest wheat producing State, estimates that the area sown to wheat this year will be about the same as last year, providing weather conditions are favourable for seeding.

Victoria, the third largest wheat producer, has just received from one and a half to two and a half inches of rain, thus relieving the drought conditions which have persisted since the beginning of January. The wheat areas had soaking rains and farmers are now preparing seed beds.

Further deliveries of wheat to the Australian Wheat Board indicate that the official estimate of 199 million bushels by the Commonwealth Statistician will be very close to the total yield.

Sales The "Leader" Melbourne, reports that contrary to expectations India has come into the market for Australian wheat, and the Australian Wheat Board has been able to negotiate the sale of a number of shipments for April-June loading. The price has not yet been disclosed, but the sale and price is very satisfactory to Australian growers. It is probable that the shipments will total about 14,000 tons. A fair cargo has been sold to Cyprus and to Beira in South Africa. A big order is also reported to have been placed by England.

A New South Wales member of the Wheat Board announced that Australia had sold 39 per cent of her 48 million bushels quota from this season's wheat crop under the I.W.A. He said the price was now close to the I.W.A. minimum of 13s.10d. (\$1.51) per bushel. Some wheat had been sold to Japan but she was expected to mill this and become a competitor in the flour market.

Wheat Stabilisation As agreement could not be reached with Victoria on the Stabilisation Plan proposed by the Commonwealth Government, a bill was introduced by the Minister for Commerce and Agriculture to return to growers the £9 million (\$19,700,000) held in the Wheat Stabilisation Fund. The Commonwealth had planned to retain this money to form the nucleus of the Stabilisation Fund for the new plan.

In moving the second reading of the Bill, the Minister said that the Federal Government would legislate for an extended wheat stabilisation plan if it was first approved by a poll of wheat growers and if State Governments agreed in detail.

It was still hoped that Victoria would come into line with the other States so that growers could decide themselves whether they wanted a stabilisation plan. However, the Commonwealth offer to guarantee a return to growers of cost of production on 100 million bushels exported in each year of the five year plan could not be held open indefinitely, the Minister said, as the plan includes the crop recently harvested.

He did not consider the 10-year plan proposed by the Opposition Party as being feasible. This 10-year plan is designed to provide wheat for home consumption including stock feed, at cost of production. At the same time,

it would give wheat growers a minimum home consumption price of 14s. (\$1.53) a bushel for the first five years of the plan, and a guarantee of 1s. 5d. (15 cents) a bushel above cost of production for the remaining five years.

For the present season wheat growers would receive the already set price of 14s. (\$1.53) a bushel for home consumption wheat. For the following four years there would be a guarantee of cost of production plus a Commonwealth Premium of 1s 5d. (15 cents) a bushel, with a guaranteed minimum of 14s. (\$1.53) a bushel. For the second five years of the plan, wheat growers would get cost of production for their home sold wheat, plus the Commonwealth premium of 1s. 5d. (15 cents) a bushel.

Other points in the plan include: 1. Growers would receive a guaranteed export price for wheat, based on cost of production and covering all export wheat. 2. Establishment of a new stabilisation fund to which growers could contribute a maximum of 1s. 6d. (16 cents) a bushel whenever the wheat export price exceeded guaranteed cost of production. 3. Limitation of £20 million (\$43,800,000) to be placed on the stabilisation fund with repayments to growers when the fund exceeded £20 million (\$43,800,000). 4. Return to growers of the £9 million (\$19,700,000) which the present Commonwealth Government has retained from the last stabilisation fund. 5. Substantial Commonwealth financial assistance would be given to provide additional facilities for bulk wheat storage. Other points of the plan were similar to the one proposed by the Government.

The plan proposed by the Labour Government is expected to be one of the main planks of the Federal Labor Party's election policy for the election in May, and it is not likely that any plan will be decided upon until after the election.

Weather and Crop Conditions Victoria. The very dry weather prevalent in Victoria since Christmas continued during March, but a heavy general rain fell this week and it is expected to give a good start to the sowing of wheat. Sowing will begin in the next four to eight weeks. Further rainfall is predicted in Gippsland and in southern and north-eastern Victoria, where it is urgently needed. Altogether, one and a half to two and a half inches fell over the State.

The rain should restore milk production which had fallen by a third through lack of green feed, and improve winter feed prospects.

Queensland. Heavy to flood rains fell over the greater part of Queensland in February. Apart from the south coast and Moreton and adjacent parts of the east Darling Downs, where reports of crop damage due to floods and gales were numerous, the benefits from the heavy rains far outweigh the losses due to flooding.

Reports generally indicate bright prospects for all primary industries, except that grass is rank in much of the coastal belt and is likely to be valueless after frosts.

Tasmania. Not much rain fall in Tasmania during March, except on the west coast. Large quantities of hay have been cut throughout Tasmania this season, ensuring plentiful feed during the winter months.

South Australia. February was one of the driest on record in South Australia, and pasturage was dry in most areas. Good rains are needed in the north-east and in some parts of the north-west. The south-east and Eyre's Peninsula remain fairly satisfactory.

Western Australia. Little rain was received in Western Australia during March, but in the first week of April good rain fell over the north-west pastoral districts, while the south-west of the State received an early start for the coming season with falls of one inch to one and a half inches.

New South Wales. Very heavy rains fell in the coastal area of N.S.W. at the end of February and disastrous flooding was experienced, especially in the Richmond and Tweed Valleys. The total damage to stock, property and crops was estimated to be £4 million (\$8,800,000). Following the rains, farmers started preparing the soil for next season's cereal crops.

In March, very little rain fell over N.S.W. pastoral areas, and conditions deteriorated almost everywhere, except in the north-west. Useful rains were received early in April, however, but the winter feed outlook is poor in some districts.

Conditions are more favourable in the north than elsewhere in the State. It is not yet too late for autumn rains to provide abundant winter pasture in all but the highest districts.

Northern Territory. Up to the end of March, the country between Darwin and Katherine had received good summer rain, and the season was normal.

An evacuation of 50,000 head of cattle from Wave Hill Station south west of Katherine in the N.T. is taking place, to save them from the drought crisis in that area. It is stated that there is not a green blade of grass on 5,000 square miles of country at Wave Hill, which during the past year has received only four and a half inches of rain.

Although rainfall in the Kimberley area was below normal, storms which broke out early in April brought welcome rains to many stations. The Fitzroy River was impassable at Fitzroy Crossing, where the water was three to four feet deep over the concrete passageway.

Falls of up to nearly three inches of rain raised new hopes on northern cattle runs just as many graziers were becoming resigned to another sub-normal season. Good general rains had not fallen in the north this year because the north-west monsoon failed and because there was no appearance of the occasional cyclone which helped most seasons. It was considered that the Kimberley area still had a "fighting chance".

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 April 23, 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.

Crop Conditions Continued cold weather has delayed spring sowings this year so that their full extent cannot be appraised for another month although there are indications that the total will be above last year. With the exception of winter oats, the fields are in satisfactory condition, and in many places superior to last year. However, there are still fears that the frost in February may have a long term effect upon yields.

Wheat Acreage Some 92,000 hectares (227,000 acres) were sown to spring wheat during March compared with 56,000 hectares (138,000 acres) last year. It would therefore appear that the heavier sowings to winter wheat will not reduce the quantity planted this spring. The wheat acreage on April 1st at 4,375,000 hectares (10,806,000 acres) is 8 per cent above the previous year and 3 per cent above 1952. The fields are developing very satisfactorily.

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

April 1 - Acreage Estimates - France

Grain	April 1, 1952	April 1, 1953	April 1, 1954
- thousand acres -			
Wheat	10,449	9,999	10,806
Wheat and Rye	63	59	52
Rye	1,132	1,037	1,028
Barley	1,274	2,303	2,019
Oats	3,123	4,811	3,976
Mixed grains	144	190	157

Source: Ministry of Agriculture.

Grain Deliveries Farmers marketings continue at a higher pace than last year, by Farmers as the following figures show:

Grain	To March 1, 1953	To March 1, 1954
- thousand bushels -		
Wheat	194,069	217,401
Rye	1,823	1,882
Barley	17,798	25,312
Oats	12,897	13,409

Source: Ministry of Agriculture.

Attempts to Reduce
Production Costs

The new French Budget contains certain provisions for reduction of taxes on fertilizers which fit in with the government's intended plan to reduce agricultural costs by 15 per cent. The chief features of the current change are the removal of sales tax at all levels of distribution, the exoneration of lime from production tax and the reduction of taxes on sulphur and copper sulphate from 15.35 per cent to 7.50 per cent.

As the following table shows, the official index of farming costs has been stable over the past year, following reduction during 1952 as a result of government action. Nevertheless, French production costs remain well above those of other European countries, and if French wheat and other agricultural commodities are ever to become competitive abroad without subsidies, there must be a lowering of costs coupled with increased productivity.

Price Index (basis 1949=100)

	March 1952	1 9 5 3				March 1954
		March	June	Sept.	Dec.	
Total	153.7	139.6	138.9	138.5	138.2	138.4
Energy	116.1	113.5	113.5	113.5	113.6	113.6
Maintenance and construction .	158.5	144.0	143.0	142.2	142.3	139.6
Fertilizers and insecticides .	163.2	140.3	138.4	135.3	137.1	140.0
Equipment	155.8	149.0	149.1	151.8	151.8	152.1
Various	183.7	156.6	156.8	156.6	148.1	144.1

Source: Institut National de la Statistique.

New Regulations
for Milling Trade

As a result of the recent unrest in the milling industry which pointed up certain anomalies in its structure, the government has now taken certain steps to (1) reduce distribution costs, and (2) to put gradually uneconomic units out of action. Since 1935, mills have been operating under a quota system whereby many of the larger more economic establishments could use only part of their capacity. This was due to the gradual decline in domestic consumption and to a policy of stabilizing the industry during the thirties.

By decree on March 31, the individual milling quota dating from May 1st will be increased by 25 per cent of the average for 1951-53 minus quantities exported or exchanged against wheat by farmers. After July 1, 1955, quotas may be increased by 10 per cent per year. It is hoped in this way that the larger units may be able to reduce their costs of production and thus their prices, and the uneconomic mills may be forced out of business. By August 1st, the government will issue new regulations to replace the present system of controlled wheat and flour distribution and equalization of freight rates. This latter again is designed as an overhaul of the system which may lead to more economic operations.

The trade has questioned this immediate increase in milling quotas by 25 per cent, particularly in the light of relatively fixed consumption. They are also disappointed that the decree was issued before the Central Council of the Grain Board was given an opportunity to express their views.

Algerian Situation A preliminary estimate of sowings in Algeria, which are now completed, show no great change from last year.

Acreage Estimates - Algeria

Grain	1953	1954
- thousand acres -		
Durum wheat	3,063	3,231
Soft wheat	998	1,047
Barley	3,050	2,939
Oats	425	435

Source of information: Gouvernement Général de l'Algérie.

CONDITION OF THE ITALIAN WHEAT CROP

Dr. C. F. Wilson, Agricultural Counsellor, Canadian Embassy, Rome, Italy reports as follows on the current Italian wheat crop:

"As of mid-April, with two months to go before the Italian wheat harvest becomes general, the condition of the Italian wheat crop is about ideal. Although last winter was colder than usual, this only temporarily retarded the wheat growth. With excellent moisture reserves on hand in the south as well as in the north the crop is now beginning to head out. After a few weeks of warm, spring-like weather in late March and early April, the weather again turned cool and rainy over Easter. Last year at this time rainfall was badly needed, but late rains and cool weather during May and June resulted in an all-time record crop."

REPORTED SALE OF WHEAT BY TURKEY TO POLAND

According to latest press reports from Turkey an agreement with Poland has been signed providing for the shipment of 150,000 tons of Turkish wheat in exchange for machinery, paper, and other manufactured items included in the lists attached to the Turco-Polish Commercial Agreement of 1948. The price is reported to be set at \$72 a ton f.o.b. Turkish port payable through the clearing agreement now operating. Since this is definitely higher than Turkish export wheat prices to more competitive European markets in recent months, it can be regarded as a nominal price. The wheat will be the soft Anatolia type, specifications approximating weight 60 to 62 pounds per bushel, maximum limit for foreign materials 3 per cent, ergot 5 per cent, humidity 12 per cent.

Wheat Stem Sawfly Cultural practices, including timely cultivation of summer-fallow, are also important. Don't be tempted to burn the stubble, the scientists advise. This practice is useless for sawfly control. The flame merely sweeps the ground, leaving the buried insects unharmed.

For summerfallow, tillage is best started around the second week in May. If it is delayed until after the first week in June, sawflies will emerge to infest nearby fields. If the land is cultivated much before the second week in May, some of the grubs may remain dormant and delay emergence until next year. Tillage should be shallow and the stubs left on the soil surface for exposure to wind and sun.

CALENDAR OF WHEAT EVENTS

April 13 The Bureau of the Census, United States Department of Commerce, estimates wheat flour production during February 1954 at 17,361,000 sacks, an average of 868,000 sacks per working day, compared with working-day averages of 948,000 sacks during January and 852,000 in February 1954.

April 15 Total stocks of Canadian wheat in all North American positions as at March 31, 1954 were estimated by the Dominion Bureau of Statistics at 741.2 million bushels, compared with 606.3 million on the same date last year and the record of 762.4 million in 1943.

According to a report from the Commercial Secretary for Canada in Athens, the 1953 wheat crop in Turkey amounted to 7,700,000 metric tons, compared with the 1952 production of 6,500,000 tons.

April 20 The 1954 season of navigation on the Great Lakes was declared officially open on Tuesday, April 20. This was nineteen days later than the official opening a year ago.

April 23 According to a report published by the Agricultural Marketing Service, United States Department of Agriculture, wheat stocks in all positions on April 1, 1954 at 1,128 million bushels were the largest for that date in the twenty-year period of comparable estimates. Off-farm stocks of 830 million bushels are the largest on record for April 1, while farm stocks of 298 million are the second largest on record.

April 26 The Bureau of Census, United States Department of Commerce states that commercial production of wheat flour in 1953 in that country amounted to 222.2 million sacks, about 6 million sacks below the 1952 output.

According to 'The Wheat Situation' the 1954 United States Winter wheat crop is forecast at 678 million bushels, some 23 per cent below the 1953 crop of 877.5 million bushels and 19 per cent smaller than the ten-year 1943-44-1952-53 average of 833.0 million bushels.

April 27 According to Broomhall unseasonably cool weather has persisted over large areas of Europe during the past week and growth of winter grains has been further delayed.



STATISTICS CANADA LIBRARY
BIBLIOTHÈQUE STATISTIQUE CANADA



1010686781

**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

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

for a world-wide picture of business today

read

foreign trade

two dollars a year *\$3.50 a year outside Canada