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AGRICULTURE DIVISION

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THE WHEAT REVIEW



NOVEMBER, 1954

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WORLD WHEAT SITUATION

Current Supplies Latest available estimates indicate that supplies of wheat remaining on or about November 1, 1954 in the four major exporting countries for export and for carryover at the end of their respective crop years amounted to 1,949.6 million bushels, about 2 per cent greater than the 1,916.5 million available a year ago. Supplies at November 1, 1954 (in millions of bushels) were held as follows, with last year's figures in brackets: United States, 1,133.9 (1,033.7); Canada, 659.9 (769.6); Australia, 99.4 (43.8); and Argentina, 56.4 (69.4). Estimates for both years include on-farm stocks as well as those in commercial positions.

Exports Total exports of wheat and flour in terms of wheat from the four major exporting countries for the first quarter of the current Canadian crop year, at 177.5 million bushels were down 3.1 per cent from the shipments of 183.1 million during the comparable quarter of 1953-54. Shipments from each of the four countries during August—October of the current and four preceding years are shown in the table below.

Exports of Wheat and Flour in Terms of Wheat, August—October
with Comparisons

August—October	United States	Canada	Argentina	Australia	Total
- million bushels -					
1950	51.4	49.3	17.2	30.9	148.8
1951	116.0	75.4	17.9	30.5	239.8
1952	85.1	94.6	-	23.0	202.7
1953	54.8	79.2	32.5	16.6	183.1
1954	49.1	73.3	33.7	21.4	177.5

Notes on New Crops The condition of new winter wheat seedings in the United States is variable. Moisture deficiencies and wind erosion have adversely affected development in some parts of the Great Plains but elsewhere the situation is more favourable. Yield prospects are, of course, extremely uncertain at this stage. However, on the assumption of yields equal to the ten-year (1943-52) average and an acreage equal to the national allotment of 55 million acres, a crop of about 850 million bushels would be produced in 1955. Latest estimates place the 1954 crop at 959.3 million bushels.

Recent unofficial estimates from the Argentine indicate that the crop now being harvested in that country may amount to some 257 million bushels. An official revised estimate places last season's wheat crop in the Argentine at 227.8 million bushels.

Drought, frost and unseasonable rains in various parts of Australia during the season have contributed to reduced crop prospects in that country. Recent estimates of the new wheat harvest range as low as 140 million bushels as against the 1953-54 crop of 199 million.

International Wheat Agreement Sales and Purchases for Crop Year 1954-55

Importing Countries	Guaranteed Quantities	S o u r c e				Total Purchases	Remainder 3/
		Canada 1/	Australia 2/	France 2/	U.S.A. 2/		
- thousand bushels -							
Austria	9,186	2,097	-	-	387	2,484	6,702
Belgium	23,883	8,433	-	-	1,321	9,754	14,129
Bolivia	4,042	-	-	-	600	600	3,442
Brazil	13,228	-	-	-	7,350	7,350	5,878
Ceylon	10,288	-	1,141	-	-	1,141	9,147
Costa Rica	1,286	299	-	-	289	588	698
Cuba	7,422	753	-	-	1,712	2,465	4,957
Denmark	1,837	-	-	-	-	-	1,837
Dominican Republic ..	1,028	84	-	-	98	182	846
Ecuador	2,388	921	-	-	53	974	1,414
Egypt	14,697	-	-	376	-	376	14,321
El Salvador	735	113	-	-	227	340	395
Germany	55,116	11,417	5,001	-	13,773	30,191	24,925
Greece	12,860	-	-	-	-	-	12,860
Guatemala 4/.....	1,286	364	-	-	954	1,318	-
Haiti	1,837	178	-	-	436	614	1,223
Honduras Republic ...	735	11	-	-	53	64	671
Iceland	404	13	-	-	14	27	377
India	36,744	1,825	16,937	-	909	19,671	17,073
Indonesia	6,246	-	1,349	-	63	1,412	4,834
Ireland	10,105	2,814	1,007	-	366	4,187	5,918
Israel	8,267	1,849	-	-	355	2,204	6,063
Japan	36,744	12,863	-	-	6,605	19,468	17,276
Jordan	2,940	-	-	-	-	-	2,940
Korea	1,470	-	-	-	-	-	1,470
Lebanon	2,756	-	-	-	125	125	2,631
Liberia	73	2	-	-	8	10	63
Mexico	14,697	-	-	-	-	-	14,697
Netherlands	24,802	8,953	305	-	4,410	13,668	11,134
New Zealand	5,879	-	2,769	-	-	2,769	3,110
Nicaragua	367	87	-	-	61	148	219
Norway	8,451	2,677	-	-	2,055	4,732	3,719
Panama	845	108	-	-	116	224	621
Peru	7,349	-	-	-	355	355	6,994
Philippines	8,672	2,354	12	-	1,392	3,758	4,914
Portugal	7,349	111	142	-	1,802	2,055	5,294
Saudi Arabia	2,572	-	-	-	-	-	2,572
Spain	9,186	-	-	-	-	-	9,186
Switzerland	7,900	6,384	-	-	-	6,384	1,516
Union of South Africa	13,228	5,600	-	-	2,053	7,653	5,575
Vatican City	551	-	-	-	355	355	196
Venezuela	6,247	1,287	-	-	671	1,958	4,289
Yugoslavia	3,674	3,620	-	-	-	3,620	54
Totals	389,372	75,217	28,663	376	48,968	153,224	
Guaranteed Quantities (Exporting Countries)		150,913	44,377	338	193,744	389,372	
Balance		75,696	15,714	(38)	144,776	236,148	

1/ Canadian sales through November 23, 1954.

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

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

4/ Quota filled.

CANADIAN SITUATION

Current Supplies and Export Outlook

The following account of current supplies and the export outlook, revised to include the latest available data, was presented as part of the report of the Grains and Feeds

Committee to the Federal-Provincial Agricultural Conference at Ottawa, December 6, 1954.

World production of wheat in the 1954-55 crop year is expected to be about 6 per cent below the 1953-54 crop of 7.2 billion bushels. However, the 1954-55 crop, estimated at about 6.8 billion bushels, is still well above the pre-war (1935-39) average of 6.0 billion. Smaller crops in Canada and the United States are largely responsible for the drop in world wheat production from the 1953-54 level.

Stocks available for export and carryover held by the four major wheat exporters (Canada, United States, Australia and the Argentine) at November 1, 1954 were 1,950 million bushels, about two per cent greater than at the same date in 1953. France will again have significant quantities available for export but the quality of her 1954 crop is poor. On the other hand, Turkey, which exported some 37 million bushels last year is reported to have a small crop. As a result, that country is not likely to enter the export market to a great extent in 1954-55 and may even be on a net importing basis.

Canadian Wheat Supplies

Item	1953-54 <u>1/</u>	1954-55 <u>2/</u>
	- million bushels -	
Carryover in North America at beginning of crop year (August 1)	369.2	594.2
New crop	614.0	298.9
Imports of wheat, August-September	<u>3/</u>	0.1
Total estimated supplies	983.1	893.2
Less estimated domestic requirements for crop year ...	134.4 <u>4/</u>	160.0
Available for export and for carryover	848.8	733.2
Deduct:		
Overseas clearances of wheat as grain, August-October	66.9	61.5
Exports of Canadian wheat to U.S., August-October ..	1.0	1.3
Total exports of wheat	67.9	62.7
Exports of wheat flour in terms of wheat, August-October	11.3 <u>5/</u>	10.6
Total exports of wheat and wheat flour	79.2	73.3
Balance on November 1 for export and for carryover ...	769.6	659.9

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

4/ Revised. 5/ Adjusted to remove effect of time lag in the returns made by Customs.

While large wheat crops have been harvested in 1954 in some importing countries, quality has, in some instances, been low, particularly in Western Europe, and a fairly substantial import demand for high quality wheat is in prospect. In addition, reserve stocks in many importing countries were drawn on heavily during the past crop year and somewhat larger shipments into these areas may accordingly be anticipated.

Canada's total 1954 wheat crop is currently estimated at just under 300 million bushels, the smallest crop since 1943, a year in which acreage was abnormally low. Ontario's winter wheat crop amounted to 24.1 million bushels as against 26.2 million last year. This year's production of durum wheat is placed at 6.6 million bushels, 2.0 million below that of 1953. Total supplies of Canadian wheat for 1954-55 are estimated at 893.2 million bushels, consisting of the July 31, 1954 carryover of 594.2 million bushels and the new crop of 298.9 million. A supply of the size indicated is the fourth largest on record, being exceeded only by the 1953-54 record level of 983.6 million bushels and the 1942-43 and 1952-53 totals of 980.4 million and 905.1 million bushels, respectively. At November 1, stocks of Canadian wheat available for export during the remainder of the crop year and for year-end carryover amounted to 659.9 million bushels, well below the 769.6 million available at the same time a year ago. In arriving at these figures estimated domestic disappearance during the crop year and exports during the August-October period have been deducted from total supplies.

Grades of the 1954 western wheat crop are generally low. About 37 per cent of the crop is expected to grade No. 3 and 4 Northern, with less than 5 per cent qualifying for No. 1 and 2 Northern. Grades 5 and 6 wheat will account for around 46 per cent, with feed wheat just under 10 per cent. Durums, Garnets, and Alberta Winters make up the small remainder. The average protein contents of Grades 1 to 4 Northern are currently estimated at 13.3, 12.4, 12.5 and 12.7 per cent, respectively. The Board of Grain Commissioners reports that baking strength is surprisingly good this year considering the protein levels and that all milling grades will substantially improve the general baking quality of weaker wheats with which they are usually blended abroad. With large quantities of high quality wheat (mostly No. 2 and 3 Northern) held over from the previous crop, Canada is in a position to supply the market with top grades as well as lower grades throughout the current crop year.

Despite the generally adverse weather experienced during the unseasonably late harvest in western Canada this season, there was a period of good weather in October which resulted in relatively little grain being harvested in tough or damp condition, a factor which may be expected to ease materially the problem of storing and handling the 1954 crop. While deliveries of wheat to date this season are far below those of the same period last year, farmers' marketings are beginning to come in more rapidly concurrent with the easing of the Wheat Board's quota restrictions on deliveries of this grain. It is now anticipated that the Wheat Board may be able to take delivery during 1954-55 of quantities equivalent to all wheat available from the present crop and a large proportion of the wheat stored on farms at the beginning of the current crop year.

The outlook for Canada's wheat exports is brighter than at this time last year. While exports during the first three months of 1954-55 were slightly below those of the same three months last season, demand is picking up and total sales this autumn are likely to be very much higher than during the autumn of last year. This year's September exports of wheat as grain, at 26.0 million bushels,

represented the largest monthly total since July, 1953 and the largest September volume since 1945. Canadian sales reported under the International Wheat Agreement between August 1 and November 23 this year had totalled some 75.2 million bushels, almost double the Agreement sales of 38.5 million reported during the comparable period of 1953-54. Wheat Agreement sales up to November 23 of the current crop year constituted about half of Canada's 1954-55 quota of 150.9 million bushels and were almost 83 per cent as large as Canada's total sales under the Agreement during the last crop year. The Canadian Wheat Board has stated they have every reason to believe that wheat sales will continue to be in better than normal volume and will be somewhat larger than sales in 1953-54 when exports of wheat and flour in terms of wheat totalled 255.1 million bushels.

Domestic disappearance of wheat during 1954-55 is at present estimated at about 160 million bushels as against the 1953-54 quantity of 134.4 million. The higher current estimate is based on the assumption that, with large quantities of low-grade wheat available, farmers will feed more wheat this year. In view of the sharply reduced 1954 crop and prospects of heavier domestic disappearance and larger exports than in 1953-54, the total carryover of wheat at July 31, 1955 should be materially reduced from the high level existing at July 31, 1954.

October Exports of Wheat
and Flour Total 24.5
Million Bushels

Total exports of Canadian wheat and wheat flour in terms of wheat during October 1954 amounted to 24.5 million bushels, slightly below both the ten-year October average exports of 25.4 million and the October, 1953 total of

26.0 million. This year's October exports were also below the 29.5 million shipped in September but substantially above the August total of 19.2 million. Exports of wheat as grain during October amounted to 20.9 million bushels, compared with 26.0 million in September and 22.3 million in October, 1953. The British waterfront strike was an important factor in reducing this year's October overseas grain shipments. Preliminary customs returns indicate that the equivalent of 3.6 million bushels of wheat were exported as wheat flour in October, 1954, virtually unchanged from the September level but somewhat below the adjusted total of 3.7 million bushels for October, 1953.

Total exports of wheat as grain during the August—October quarter of the current crop year amounted to 62.7 million bushels as against 67.9 million for the same period in 1953-54. Some 25.3 million bushels, representing slightly over 40 per cent of the total, were shipped to the United Kingdom during the first three months of the current crop year. Other major markets for Canadian wheat during the period, with quantities in millions of bushels, were as follows: the Federal Republic of Germany, 9.9; the Netherlands, 6.2; Belgium, 5.4; Yugoslavia, 3.6; and Japan 3.1.

Cumulative flour exports for the August—October period of 1954, based on preliminary customs returns, were the equivalent of 10.6 million bushels of wheat. This represents a decrease of 7 per cent from the adjusted totals for the same period in 1953. As with wheat, the United Kingdom provided the largest single market for wheat flour, taking the equivalent of 1.3 million bushels or 36 per cent of the three-month total.

Delivery Quotas The Canadian Wheat Board's delivery quota policy for 1954-55 as set out in its "Instructions to the Trade re Quotas, No. 1", issued July 29, was discussed on pp. 4-6 of the July, 1954 issue of "The Wheat Review". A subsequent statement relative to quotas was published on page 9 of the September issue. On October 8 an important "Instruction to the Trade" on quota policies was issued by the Board but was inadvertently omitted from the October Wheat Review. This 'Instruction' (No. 33) reads as follows:

"In Instructions to the Trade re Quotas No. 1 issued July 29, 1954, the Board outlined its intended quota policy for the 1954 crop season. In this Instruction dealing with the initial delivery quota the Board stated that effective at a date to be announced later, it was instituting an initial delivery quota for wheat other than durum, oats, barley, and rye on the basis of the equivalent of 100 units, each unit being the equivalent of three bushels of wheat or eight bushels of oats or five bushels of barley or five bushels of rye. Since this Instruction was issued this initial delivery quota has become effective at a number of delivery stations.

"At the time this Instruction was issued it was the intention of the Board to authorize a further minimum delivery privilege under the unit system prior to instituting its regular delivery quota based on each producer's specified acreage as indicated in his permit book. However, due to adverse weather conditions that have developed with the resultant delay in harvest, the Board has abandoned its idea of instituting a further unit quota and has decided that a regular delivery quota based on specified acreage will be made effective as soon as space permits at all delivery stations. In view of this change of policy the Board now wishes to announce:

1. Initial Quota.- Effective Friday, October 15, the initial delivery quota is authorized at all delivery stations in the designated area where this initial quota has not previously been in effect. Under this provision producers may deliver 300 bushels of wheat or 800 bushels of oats or 500 bushels of barley or rye or any combination of these grains not in excess of 100 units.

2. General Quota.- A general quota of two bushels per specified acre will be made effective by the Board at individual stations as space in excess of the quantity required to take delivery of the initial delivery quota (100 units) becomes available and this general quota will be increased by the Board from time to time at individual stations as space permits. As was the case last year, producers may deliver under the general quotas as they are established - wheat or oats or barley or rye or any combination of these grains to the extent that their specified acreage will permit.

3. Special Quota Authorizing Delivery of 1,000 Bushels of Oats.- In its Quota Circular No. 1, the Board authorized producers who were in a position to do so to deliver on and after August 1 up to 1,000 bushels of oats or up to 1,000 bushels of barley or any combination of both these grains not to exceed 1,000 bushels. As the initial delivery quota became effective at individual delivery stations this special delivery privilege for oats and barley was rescinded and effective midnight Wednesday, September 22 the special quota authorizing deliveries up to 1,000 bushels of barley was cancelled. The special quota authorizing the delivery of 1,000 bushels of oats has been left in effect except at those stations where the initial quota was established.

In view of the fact that sufficient oats have not yet been delivered to meet the Board's immediate market requirements, the Board has now decided that rather than cancel the special delivery privileges covering oats at this time, producers who have been unable to deliver the special quota referred to will still be allowed to deliver the balance of this special quota in the form of oats regardless of the fact that the initial delivery quota will become effective at all stations on Friday, October 15.

The Board further advises that at stations where the initial delivery quota became effective prior to October 15 resulting in the cancellation of the special oat quota that these previous instructions are rescinded and that producers at these stations will be allowed to deliver the balance of this special quota in the form of oats if they are in a position to do so, such oats delivery to be over and above the oat deliveries authorized under the initial delivery quota policy. The above policy will remain in effect until further notice but will be subject to cancellation by the Board at any time and there is no obligation on the part of the Board to continue the authorization in the event of a producer being unable to avail himself of the opportunity of delivering these oats due to lack of space or to other circumstances.

Except for these changes in its basic quota policy, the general instructions regarding quotas as outlined in Instructions to the Trade re Quotas No. 1 issued July 29, 1954 remain in effect."

The provisions covering the operation of the 'general' quota referred to above are similar to those in effect for 1953-54 and were described in some detail in the July, 1953 issue of 'The Wheat Review'. It will be recalled that the 'specified acreage' figure includes the producer's acreage seeded to wheat (other than Durums), and to oats, barley and rye, plus the producer's summerfallow acreage. Durum wheat and flaxseed are on an open quota basis as was the case in 1953-54.

By November 30, 1954, out of the 2,079 shipping points in the Western Division the Board had been able to place 1,160 on a general quota of 2 bushels per specified acre. Sixty-seven points were on a four-bushel quota while the remainder, 852 points, were still on the initial delivery quota (100 unit) basis.

Summary of Elevator Shipping Points in Each Quota Group in the Western Division
as at November 30, 1954

Province	Initial Quota (100 Units)	General Quota in Bushels per Specified acre		Total
		Two	Four	
Ontario	-	2	-	2
Manitoba	191	179	10	380
Saskatchewan	433	641	35	1,109
Alberta	226	336	22	584
British Columbia	2	2	-	4
All Provinces	852	1,160	67	2,079

Canadian Wheat Board's
Announcement re
Interim Payment

On November 8, 1954 the Canadian Wheat Board issued the following "Instructions to the Trade", supplementing the information published in the October issue of this publication on the interim payment on wheat delivered to

the 1953-54 pool:

"The Rt. Hon. C. D. Howe, Minister of Trade and Commerce, announced on Saturday, November 6, 1954 that an interim payment of 10 cents per bushel will be made from the 1953-54 Pool Account for Wheat. This payment will apply to all grades of wheat received from producers from August 1, 1953 to July 31, 1954 with the exception of Garnet Wheat, Soft White Spring Wheat, Alberta Red Winter Wheat and Alberta Winter Wheat. The grades excluded from the announced interim payment are grades for which demand is limited.

"The interim wheat payment involves the distribution of approximately \$38,600,000 to producers in the Prairie Provinces. The mailing of interim payment cheques by the Board will commence on November 23, 1954. When this payment is completed the fall distribution to producers in interim payments from the 1953-54 Pool Account for Wheat and final payments from the 1953-54 Pool Accounts for Oats and Barley will equal a combined total of about \$54,000,000."

Distribution of
Selkirk Wheat

With estimates of the rust toll of Prairie wheat this year running to 100,000,000 bushels and upwards, the supply of seed of the resistant variety, Selkirk, becomes a matter of utmost importance to farmers throughout Western Canada—and more particularly to those in the vast area extending throughout Manitoba, most of Saskatchewan, and east central and north-east Alberta, where losses were heavy. In view of this, steps have already been taken to control the export of Selkirk seed, and the Canada Department of Agriculture announces a distribution plan to cover an estimated 250,000 bushels under its control.

In addition to the above supply, it is estimated that 3,000,000 bushels have been grown on individual farms from the 6-bushel lots sold last year, and some of these farmers will no doubt have more than they intend to sow themselves. Any farmer who can obtain seed from a neighbour is strongly advised to do so at once.

The variety was developed by using MacMurachy wheat for stem rust resistance, Exchange wheat, for leaf rust resistance, and three crossings with Redman wheat, to obtain high yield, adaptation and quality. It was produced by the Cereal Breeding Laboratory, Winnipeg, Manitoba, with the assistance of various units of the Experimental Farms Service, Science Service, and the Grain Research Laboratory of the Board of Grain Commissioners.

With a view to ensuring as wide a distribution as possible of the 250,000 bushels under its control, the Department's supply of seed will be offered to the public in lots of not less than two nor more than twelve bushels.

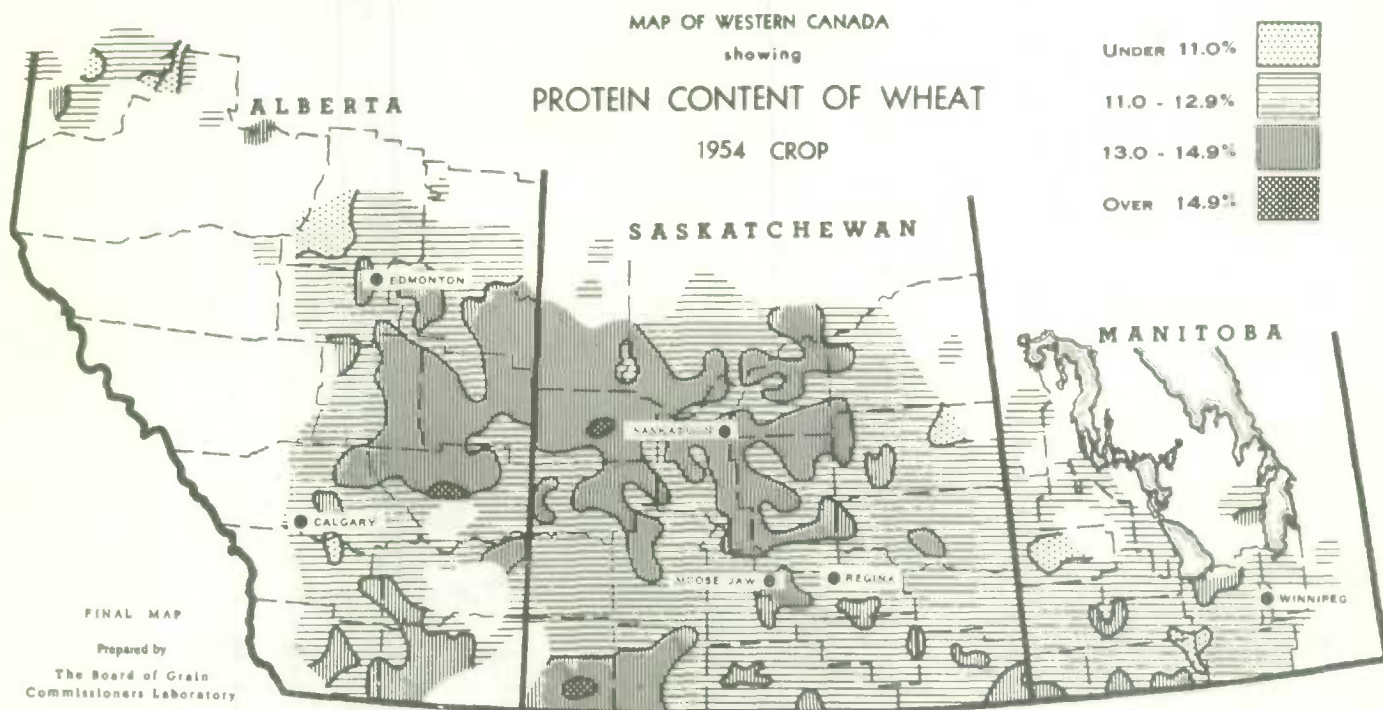
The price for seed offered by the Department will be \$4.50 per bushel for Registered, \$4 per bushel for Certified, and \$3 per bushel for Commercial. All prices are F.O.B. shipping point. Most of the seed available from this source will likely be Registered.

If the supply of seed controlled by the Department is not sufficient to meet the demand from farmers in the areas severely affected in 1954, the Department reserves the right to hold up orders for Selkirk seed from farmers in areas not so affected, i.e., southwestern Saskatchewan, southern Alberta, and northwestern Alberta.

Protein Content of
Western Canada's 1954
Hard Red Spring Wheat

According to Crop Bulletin No. 54 "Protein Survey of Wheat, 1954" published by the Grain Research Laboratory of the Board of Grain Commissioners for Canada, the average protein content of this year's Western hard red spring wheat crop is 12.6 per cent. The results are based on analyses of 6,025 samples of grades No. 1 to No. 4 Northern, 4 Special and Garnet collected from 1,445 shipping points in the three Prairie Provinces. This year's protein content of 12.6 per cent is 0.3 per cent lower than the corresponding figure for 1953 of 12.9 per cent.

The map below shows the areas of high, medium, below-average, and low-protein content of hard red spring wheat for 1954. It was prepared by plotting the mean protein data, based on one to twelve samples for each shipping point, on a larger-scale map, and then outlining and hatching zones for different protein ranges. The boundaries between zones can be placed with a fair degree of accuracy, but the actual lines of demarkation are somewhat arbitrary because protein content tends to change gradually from one district to another. Individual samples of a given protein level may also occur in areas of a different protein range. The map presents a general picture of the geographic distribution of wheat of different protein contents rather than a detailed picture.



A low-protein area, 11.0 to 12.9 per cent, covers most of Manitoba and eastern Saskatchewan, and extends on through south central Saskatchewan. In Alberta, low-protein areas cover the southern districts, with the exception of crop district 1, and extend upwards to the west and north of the province. Small medium-protein areas are scattered in Manitoba, and in eastern Saskatchewan. A large medium-protein area is concentrated in northwestern crop districts of Saskatchewan, and extends in irregular pattern to the central districts of the province. In Alberta, medium-protein areas occur in southern and north-central crop districts. Only three very small areas of above-average protein are shown on the whole map.

Protein Contents of Grades of Hard Red Spring Wheat,
1954 Values for Each Province and 1954 and 1953 Values for Western Canada

Grade	1954 Crop			Western Canada	
	Manitoba	Saskatchewan	Alberta	1954	1953
	- per cent -				
No. 1 Northern	11.9	13.0	13.7	13.2	13.3
No. 2 Northern	11.8	12.8	12.9	12.7	13.0
No. 3 Northern	12.0	12.6	12.5	12.5	12.7
No. 4 Northern	12.2	12.8	12.7	12.7	13.1
No. 4 Special	12.0	12.6	11.5	12.6	-
Garnet Grades	-	11.2	11.0	11.0	11.8
Weighted Mean	12.1	12.7	12.6	12.6	12.9

Farmers' Marketings Deliveries of wheat by Western Canadian farmers during recent weeks have increased substantially, reflecting the adjustment of delivery quotas as outlined elsewhere in this issue. Marketings during the four-week period ending November 17, 1954 amounted to 35.2 million bushels, slightly above the 34.5 million delivered during the comparable period last year. However, cumulative wheat marketings from the beginning of the crop year to November 17 amounted to only 52.0 million bushels, far below last year's level of 147.8 million and the ten-year average for the corresponding period of 174.4 million. Although wheat marketings have been little more than one-third those of 1953-54 for the period under review, combined marketings of oats and barley reached 92.0 million bushels, some 32 per cent above the comparable 1953 total of 69.8 million.

Farmers' Marketings of Wheat in the Prairie Provinces, 1954-55

Week ending		Manitoba	Saskatchewan	Alberta	Total	Last year
- bushels -						
August	11, 1954 ..	2,105	1,801	403	4,309	8,553,128
	18,	-	5,138	-	5,138	9,260,410
	25	2,360	249	-	2,609	8,717,439
September	1	36,888	70,049	42,983	149,920	7,940,876
	8	87,706	130,042	74,197	291,945	6,173,123
	15	46,406	386,002	169,180	601,588	9,454,131
	22	45,889	507,923	211,592	765,404	13,734,935
	29	37,928	1,090,255	431,177	1,559,360	12,500,992
October	6	57,424	1,389,836	558,014	2,005,274	14,687,130
	13	215,283	1,582,821	832,406	2,630,510	12,415,921
	20	1,311,584	4,984,872	2,448,081	8,744,537	9,842,042
	27	906,558	6,668,350	3,208,600	10,783,508	8,166,436
November	3	679,045	5,743,816	2,843,527	9,266,388	7,510,266
	10	628,805	4,710,121	2,688,593	8,027,519	8,575,483
	17	678,648	4,491,537	1,989,126	7,159,311	10,221,685
Totals		4,736,629	31,762,812	15,497,879	51,997,320	147,753,997

Average similar period

1943-44-1952-53 25,868,058 100,606,807 47,949,896 174,424,762

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

Position	1952	1953	1954
- thousand bushels -			
Country elevators - Manitoba	8,847	19,921	23,103
Saskatchewan	87,166	109,592	110,018
Alberta	48,146	61,496	59,263
Totals	144,159	191,008	192,384
Interior private and mill	5,581	5,064	5,949
Interior terminals	5,970	13,830	14,795
Vancouver-New Westminster	8,435	9,901	9,994
Victoria	-	452	758
Prince Rupert	-	724	220
Churchill	2,048	2,431	2,400
Fort William-Port Arthur	22,001	30,059	26,159
In transit rail (Western Division)	17,445	12,935	8,460
Bay, Lake and Upper St. Lawrence ports..	16,643	40,259	39,447
Lower St. Lawrence and Maritime ports..	8,450	17,024	22,641
In transit lake	10,779	9,811	11,115
In transit rail (Eastern Division)	1,642	2,140	1,944
United States ports	1,546	1,022	62
In transit U.S.A.	-	7	-
Totals	244,699	336,667	336,327

Grading of Wheat Inspected, August—October, 1954 with Comparisons

Grade	Crop Year		August—September			
	Average 1948-49— 1952-53	1953-54	1953		1954	
	per cent	per cent	cars	per cent	cars	per cent
1 Hard	1/	-	-	-	-	-
1 Man. Northern	12.1	8.0	4,491	8.4	2,773	7.3
2 Man. Northern	29.7	45.9	21,376	40.2	20,648	54.7
3 Man. Northern	13.9	20.4	9,397	17.7	7,406	19.6
4 Man. Northern	7.4	5.0	3,882	7.3	1,428	3.8
5 Wheat	7.7	4.8	4,235	8.0	291	0.8
6 Wheat	3.8	2.1	680	1.3	66	0.2
Feed Wheat	0.6	0.2	68	0.1	14	1/
Garnet	0.9	0.5	371	0.7	500	1.3
Amber Durum	2.9	2.2	2,620	4.9	752	2.0
Alberta Winter	0.4	0.1	129	0.2	172	0.5
Toughs 2/ 3/	15.6	9.0	4,942	9.3	3,104	8.2
Damps 2/ 4/	3.6	1/	7	1/	57	0.2
Rejected 2/	0.7	1.2	716	1.3	396	1.0
All others	0.6	0.6	279	0.5	145	0.4
Totals	100.0	100.0	53,193	100.0	37,752	100.0

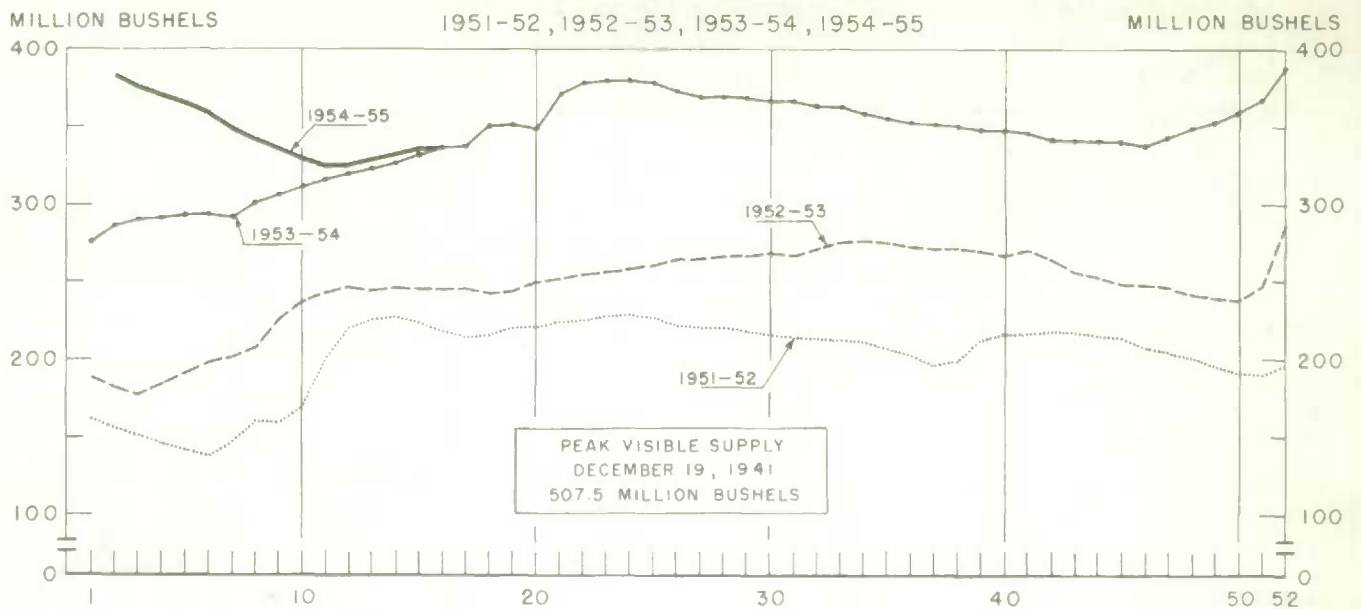
1/ Less than .05 per cent.

2/ All varieties and grades.

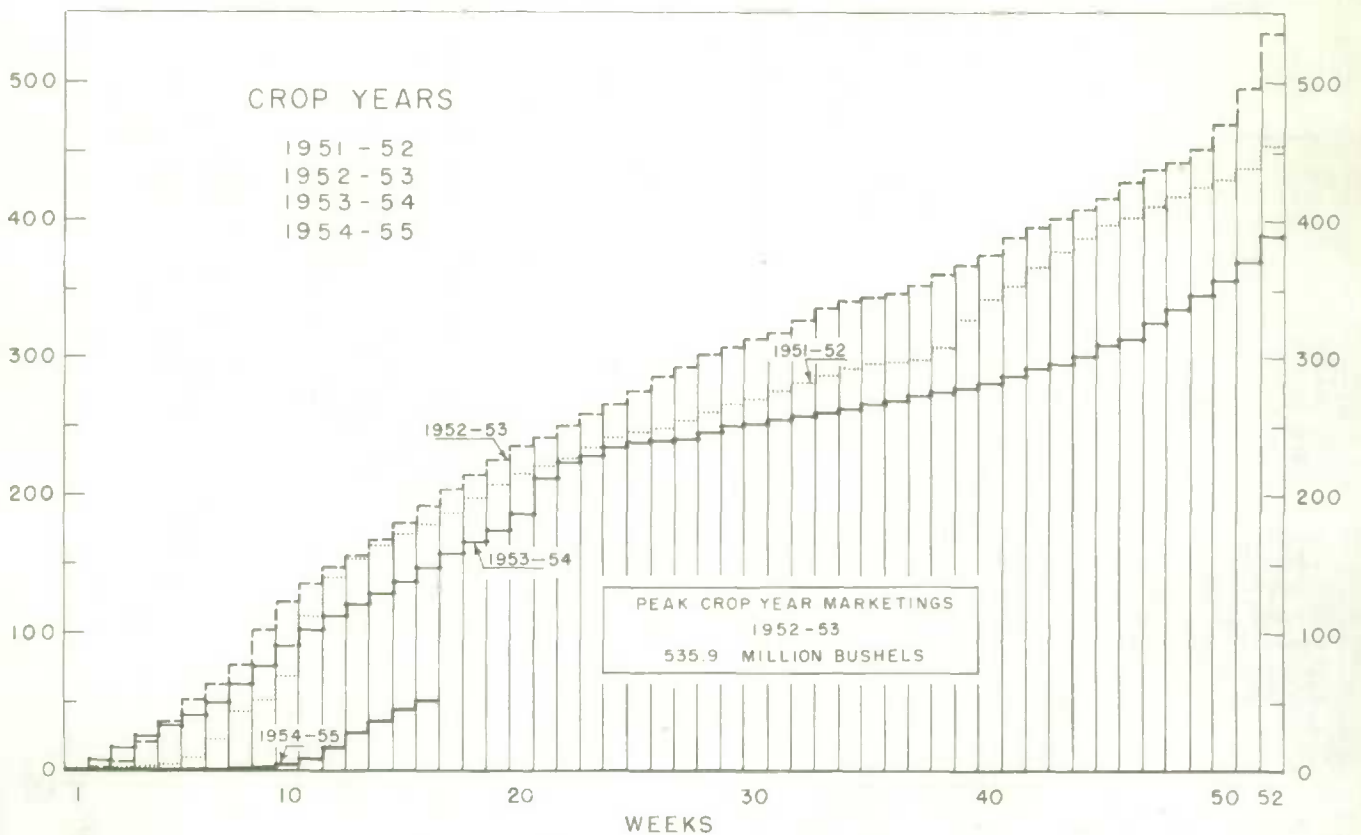
3/ Moisture content 14.9 to 17 per cent for Durum, 14.6 to 17 per cent for all other varieties.

4/ Moisture content over 17 per cent.

WEEKLY VISIBLE SUPPLY OF CANADIAN WHEAT



CUMULATIVE RECORD OF WHEAT MARKETINGS IN THE PRAIRIE PROVINCES, BY WEEKS



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

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

Year	Wheat	Oats	Barley	Rye	Flaxseed	Total
- thousand bushels -						
1944	259,416	68,573	50,390	7,203	5,696	391,278
1945	302,197	78,642	39,750	3,876	3,406	427,872
1946	111,887	49,523	25,724	2,151	1,668	190,954
1947	135,141	38,653	22,686	7,256	1,860	205,597
1948	107,649	28,967	26,741	4,924	6,907	175,188
1949	150,756	38,553	31,769	12,109	8,363	241,552
1950	111,378	21,067	22,827	4,202	3,303	162,778
1951	161,641	50,255	40,004	6,422	1,767	260,088
1952	203,332	76,566	87,864	6,453	5,666	379,882
1953	187,441	86,386	102,234	15,547	5,848	397,457
1954	116,051	50,817	73,006	6,750	4,147	250,770

*Shipments from opening of navigation to November 14, 1944 through 1947. Shipments for subsequent years to the following dates: November 18, 1948; November 17, 1949; November 16, 1950; November 15, 1951; November 20, 1952; and November 19, 1953.

Wheat Shipments* to the United States by Destination August 1 to November 17, 1954
Compared with Approximately the Same Period 1952 and 1953

Destination	1952	1953	1954
- bushels -			
<u>By Vessel</u>			
Duluth-Superior	2,000,711	-	-
Chicago	244,968	-	-
Huron	320,734	-	40,000
Erie	276,567	-	-
Buffalo	7,280,000	1,807,119	1,381,868
Oswego	1,102,391	-	-
Totals, Vessel	11,225,371	1,807,119	1,421,868
<u>By Rail</u>			
U. S. A. Seaboard Ports	-	7,348	-
Other U. S. A. Points	2,168,765	993,875	86,498
Totals, Rail	2,168,765	1,001,223	86,498
Totals, Shipments	13,394,136	2,808,342	1,508,366

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

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

Origin of Shipments	August 1 to October 31, 1953	August 1 to October 31, 1954
- bushels -		
Port McNicoll	150,000	-
Midland	267,900	322,670
Collingwood	-	65,300
Goderich	-	78,098
Walkerville	45,082	-
Totals	462,982	466,068

Rail Shipments of Wheat from Fort William—Port Arthur, 1951-52—1954-55

Month	1951-52	1952-53	1953-54	1954-55
	- bushels -			
August	283,914	191,711	191,336	61,070
September	435,068	1,181,046	236,030	50,633
October	159,667	936,757	173,043	46,053
November	465,193	651,957	138,440	
December	1,387,828	464,914	347,824	
January	5,839,567	6,550,958	510,486	
February	3,618,007	9,566,151	368,662	
March	1,564,586	6,285,944	555,518	
April	107,061	189,339	378,681	
May	132,496	216,046	253,606	
June	196,083	136,014	37,349	
July	113,827	223,687	74,020	
Totals	14,303,297	26,594,524	3,264,995	

Distribution of Rail Shipments of Wheat from Fort William—Port Arthur, October, 1954

Grade	New Brunswick	Quebec	Ontario
	- bushels -		
5 Wheat	-	-	1,500
6 Wheat	-	6,666	1,333
Toughs	-	4,350	1,871
Amber Durum	-	4,000	6,000
All Others	2,939	7,842	9,552
Totals	2,939	22,858	20,256

Overseas Exports of Canadian Grain by Ports of Loading, August 1 to November 17, 1954,
with Comparisons

Ports	Wheat	Oats	Barley	Rye	Flaxseed
	- thousand bushels -				
<u>Pacific Seaboard</u>					
Vancouver-New Westminster ..	22,024	1,221	563	-	12
Prince Rupert	147	-	271	-	-
<u>Churchill</u>	11,986	-	-	-	-
<u>Lakehead Direct</u>	-	-	158	-	-
<u>St. Lawrence</u>					
Montreal	22,491	394	12,294	423	300
Sorel	4,678	-	1,986	399	-
Three Rivers	5,111	-	454	-	-
Quebec	5,399	-	-	-	-
<u>U. S. Atlantic Seaboard</u>	-	-	-	213	-
Totals	71,837	1,615	15,725	1,036	312
August 1—November 18, 1953 ...	75,644	2,242	24,019	384	1,271

Freight Assistance Policy Claims filed for payment up to October 31, 1954 represent shipments of 2.1 million bushels of wheat from the Prairie Provinces to Eastern Canada and British Columbia under the freight assistance policy during the first two months of the current crop year. During the same period in 1953 claims had been filed for some 1.8 million bushels, indicating on the assumption of approximately the same rate of submission of claims during both this year and last, that the 1954 August-September wheat movements under the policy were somewhat greater than in 1953. Revised data on the 1953 August-September shipments, based on all claims submitted up to October 31, 1954, place the two-month total at 2.3 million bushels. During the period under review, the bulk of the shipments went to destinations in Quebec and Ontario.

Provincial Distribution of Wheat Shipments under the Freight Assistance Policy
August-September, 1954 and 1953

Month	Nfld.	P.E.I.	N.S.	N.B.	Que.	Ont.	B.C.	Total
- thousand bushels -								
August, 1954	4	11	73	41	458	458	159	1,203
September	3	8	43	34	470	302	40	900
Totals	7	19	116	75	928	760	199	2,103
Same period 1953:								
Preliminary 2/	7	28	107	72	800	578	189	1,781
Revised	13	31	125	84	867	703	453	2,276

Preliminary data on millfeed shipments under the freight assistance policy indicate shipments of 57,959 tons during the August-September period of the current crop year. This total, based on claims filed up to October 31, 1954, will most likely be subject to considerable upward revision with the filing of additional claims. Some indication of the possible size of the revision is given by the fact that by October 31, 1953 claims had been filed for only 46,376 tons out of a total of 64,209 tons shipped during the first two months of 1953. As with freight-assisted wheat shipments, the bulk of the millfeed shipments during the period under review went to destinations in Quebec and Ontario.

Provincial Distribution of Millfeed Shipments under the Freight Assistance Policy
August-September, 1954 and 1953

Province	1953		1954
	Preliminary 2/	Revised 1/	Preliminary 1/
- tons -			
Newfoundland	265	548	246
Prince Edward Island	766	931	1,124
Nova Scotia	3,086	4,445	2,989
New Brunswick	2,914	3,796	3,581
Quebec	25,576	31,458	31,456
Ontario	10,249	15,248	16,223
British Columbia	3,520	7,783	2,340
Totals	46,376	64,209	57,959

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

2/ Based on claims filed up to October 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 ^{3/} Exports of Canadian Wheat Flour	Total	Customs ^{3/} Exports of Wheat and Wheat Flour
- thousand bushels -					
<u>1952-53</u>					
August	26,089	2,559	4,031	32,679	33,773
September	21,208	3,312	4,891	29,411	29,240
October	24,106	2,950	5,474	32,530	34,579
November	34,339	3,677	5,647	43,663	41,631
December	21,777	2,883	5,146	29,806	36,769
January	17,518	1,206	3,443	22,167	21,941
February	13,135	847	3,603	17,585	17,318
March	11,220	915	4,724	16,858	17,236
April	19,019	1,341	4,508	24,867	21,681
May	40,179	1,476	6,247	47,902	43,875
June	37,390	1,617	4,880	43,887	46,309
July	40,149	115	3,906	44,170	44,692
Totals	306,129	22,897	56,501	385,527	389,045
<u>1953-54</u>					
August	24,152	569	3,983	28,704	27,321
September	20,672	198	3,670	24,540	24,574
October	22,072	258	3,653	25,984	30,838
November	18,815	1,549	3,791	24,155	23,850
December	12,857	795	4,110	17,762	20,283
January	13,416	409	3,778	17,604	17,218
February	10,273	287	3,427	13,987	15,025
March	14,079	167	3,939	18,186	17,266
April	10,708	777	4,611	16,096	16,454
May	16,987	1,228	3,888	22,103	24,353
June	19,854	1,320	4,002	25,176	23,828
July	17,271	120	3,393	20,784	19,472
Totals	201,157	7,678	46,246	255,081	260,482
<u>1954-55 ^{4/}</u>					
August	15,666	185	3,380	19,230	20,088
September	25,744	209	3,579	29,533	22,814
October	20,046	882	3,596	24,524	21,713
Totals	61,456	1,276	10,555	73,287	64,615

^{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 1952-53 and 1953-54 adjusted to remove effect of time lag in the returns made by Customs.

^{4/} Subject to revision.

Exports of Canadian Wheat and Wheat Flour, Crop Year 1953-54

Destination	Wheat 1/	Wheat Flour 2/	Total Wheat 1/ and Wheat Flour 2/
- bushels -			
<u>COMMONWEALTH COUNTRIES</u>			
United Kingdom	65,809,195	16,210,517	82,019,712
<u>Africa</u>			
Gambia	-	20,835	20,835
Gold Coast	-	904,378	904,378
Nigeria	-	526,770	526,770
Other British West Africa	-	6,426	6,426
Sierra Leone	-	115,434	115,434
Union of South Africa	7,722,960	-	7,722,960
<u>Asia</u>			
Ceylon	-	242,829	242,829
Hong Kong	168,560	1,109,754	1,278,314
India	4,272,438	76	4,272,514
Malaya and Singapore	1,683,173	380,457	2,063,630
<u>Europe</u>			
Gibraltar	-	142,326	142,326
<u>North America</u>			
Bahamas	-	252,522	252,522
Barbados	1,508	416,853	418,361
Bermuda	-	117,752	117,752
British Honduras	-	56,781	56,781
Jamaica	3,490	1,662,822	1,666,312
Leeward-Windward Islands	-	977,805	977,805
Trinidad and Tobago	-	2,251,890	2,251,890
<u>South America</u>			
British Guiana	-	900,351	900,351
Totals, Commonwealth Countries ...	79,661,324	26,296,578	105,957,902
<u>FOREIGN COUNTRIES</u>			
<u>Africa</u>			
Azores and Madeira	-	58,820	58,820
Belgian Congo	9,186	703,008	712,194
Canary Islands	-	918	918
Egypt	-	1,768	1,768
French Africa	-	7,844	7,844
Liberia	-	7,619	7,619
Libya	451,734	1,494	453,228
Morocco	-	293,432	293,432
Portuguese East Africa	398,346	10,876	409,222
Portuguese West Africa	-	41,260	41,260
Spanish Africa	-	14,148	14,148
<u>Asia</u>			
Arabia	-	98,581	98,581
Formosa	79,707	-	79,707
Indonesia	-	72,041	72,041
Israel	4,482,864	3,060	4,485,924
Japan	39,387,301	1,089,837	40,477,138
Korea	-	1,054,274	1,054,274
Lebanon	-	116,865	116,865
Philippine Islands	-	5,189,171	5,189,171
Portuguese Asia	-	18,360	18,360
Syria	-	135	135
Thailand	-	305,946	305,946
<u>Europe</u>			
Austria	350,000	-	350,000
Belgium	13,285,003	-	13,285,003
Denmark	878,700	1,242	879,942

Exports of Canadian Wheat and Wheat Flour, Crop Year 1953-54

Destination	Wheat 1/	Wheat Flour 2/	Total Wheat 1/ and Wheat Flour 2/
		- bushels -	
FOREIGN COUNTRIES			
<u>Europe</u>			
Finland	161,680	-	161,680
France	709,334	17,172	726,506
Germany, Federal Republic of	20,699,355	650,903	21,350,258
Iceland	-	172,755	172,755
Ireland	1,950,554	-	1,950,554
Italy	382,922	173,034	555,956
Netherlands	6,814,869	32,638	6,847,507
Norway	3,186,992	-	3,186,992
Portugal	354,667	57,623	412,290
Spain	3,424,966	-	3,424,966
Switzerland	9,884,905	180	9,885,085
Yugoslavia	-	18,720	18,720
<u>North America</u>			
Alaska	-	9	9
Costa Rica	40,000	456,476	496,476
Cuba	1,149,217	907,942	2,057,159
Dominican Republic	-	510,687	510,687
El Salvador	-	302,922	302,922
French West Indies	-	7,029	7,029
Guatemala	-	466,191	466,191
Haiti	-	615,713	615,713
Honduras	6,667	21,443	28,110
Mexico	-	1,098	1,098
Netherlands Antilles	-	237,960	237,960
Nicaragua	-	300,865	300,865
Panama	-	355,189	355,189
St. Pierre-Miquelon	-	19,409	19,409
<u>United States</u>			
Flour in terms of wheat	-	284,548	284,548
For milling in bond 3/	2,160,739	-	2,160,739
For domestic use 3/	5,517,413	-	5,517,413
Virgin Islands	-	11,776	11,776
<u>Oceania</u>			
French Oceania	-	12,654	12,654
Guam	-	3,456	3,456
<u>South America</u>			
Bolivia	846,120	16,132	862,252
Brazil	7,705,841	1,440	7,707,281
Colombia	1,270,089	797,607	2,067,696
Ecuador	2,005,800	42,462	2,048,262
Peru	1,567,351	42,039	1,609,390
Surinam	-	204,934	204,934
Venezuela	11,480	4,115,997	4,127,477
Totals, Foreign Countries	129,173,802	19,949,702	149,123,504
Totals, All Countries	208,835,126	46,246,280	255,081,406

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

2/ Adjusted to remove effect of time lag in the returns made by Customs.
In terms of wheat equivalent. Source: Canadian Customs returns.
Conversion rate: 4 1/2 bushels of wheat equals 1 barrel of 196 pounds of wheat flour.

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

Exports of Canadian Wheat and Wheat Flour by Destination 1954-55

Destination	July	October		August—October	
	Wheat Flour 1/2/	Wheat Flour 2/	Wheat 3/	Wheat Flour 2/	Wheat 3/
			- bushels -		
COMMONWEALTH COUNTRIES					
United Kingdom	1,227,578	1,304,519	6,864,331	3,815,910	25,327,648
Africa					
British East Africa	-	-	-	2,075	-
Gambia	1,031	-	-	4,041	-
Gold Coast	73,080	70,591	-	295,317	-
Nigeria	40,180	22,212	-	148,027	-
Other British West Africa	-	-	-	8,258	-
Rhodesia	-	-	91,466	-	91,466
Sierra Leone	10,278	19,039	-	58,378	-
Asia					
Ceylon	-	100,256	-	100,256	-
Hong Kong	89,131	41,751	-	301,887	-
India	-	-	724,267	-	1,470,000
Malaya and Singapore	36,689	21,056	-	90,977	-
Europe					
Gibraltar	7,704	14,450	-	33,390	-
Malta	-	-	-	-	399,468
North America					
Bahamas	15,552	12,226	-	53,878	-
Barbados	31,279	23,454	-	102,316	833
Bermuda	5,328	5,926	-	26,685	-
British Honduras	2,196	-	-	3,762	-
Jamaica	84,168	104,607	1,167	307,152	1,167
Leeward and Windward Islands ...	58,176	60,390	-	250,173	-
Trinidad and Tobago	66,298	183,672	-	537,732	-
South America					
British Guiana	11,565	11,781	-	43,272	-
Totals, Commonwealth Countries	1,760,233	1,995,930	7,681,231	6,183,486	27,290,582
FOREIGN COUNTRIES					
Africa					
Azores and Madeira	3,524	2,250	-	16,974	-
Belgian Congo	101,713	46,517	-	175,838	-
French Africa	-	-	-	1,768	-
Liberia	306	103	-	2,308	-
Libya	-	-	-	-	112,000
Moreocco	252	6,309	-	11,349	-
Portuguese East Africa	202	-	-	-	-
Portuguese West Africa	1,669	7,281	-	15,939	-
Asia					
Arabia	-	-	14,698	238	14,698
Bahrein	-	-	14,698	-	14,698
Israel	-	-	364,934	-	1,064,000
Japan	63,707	89,550	1,157,770	197,069	3,077,824
Lebanon	306	15,426	-	15,790	-
Philippine Islands	428,153	574,853	-	1,607,504	-
Portuguese Asia	2,295	-	-	2,295	-
Thailand	20,970	14,576	-	51,089	-
Europe					
Austria	-	-	500,854	-	1,275,707
Belgium	-	-	2,469,620	-	5,353,218
Denmark	229	-	-	230	-
France	4,041	-	-	2,020	-

Exports of Canadian Wheat and Wheat Flour by Destination, 1954-55

Destination	July	October		August—October	
	Wheat Flour 1½/	Wheat Flour 2/	Wheat 3/	Wheat Flour 2/	Wheat 3/
- bushels -					
FOREIGN COUNTRIES					
Europe					
Germany, Federal Republic of	57,461	32,180	3,651,112	109,643	9,925,313
Greece	-	2,025	-	2,025	-
Iceland	-	5,504	-	9,423	-
Ireland	-	-	-	-	605,920
Italy	1,606	4,414	92,064	4,414	110,436
Netherlands	-	-	2,386,187	1,516	6,158,649
Norway	-	-	273,340	-	729,708
Portugal	2,525	3,096	-	6,998	-
Switzerland	-	-	915,460	-	1,132,367
Yugoslavia	459	1,606	392,160	2,754	3,620,007
North America					
Costa Rica	49,496	44,393	-	89,636	-
Cuba	62,847	64,620	1,000	135,058	373,400
Dominican Republic	43,209	15,489	-	37,539	2,500
El Salvador	26,087	36,751	-	83,376	-
French West Indies	1,282	-	-	1,184	-
Guatemala	71,946	40,316	-	149,481	-
Haiti	44,438	37,490	-	135,932	-
Honduras	-	-	-	459	-
Mexico	549	-	-	112	-
Netherlands Antilles	25,105	26,172	-	67,523	-
Nicaragua	16,452	13,090	-	48,654	-
Panama	22,626	29,759	-	62,564	-
St. Pierre and Miquelon	50	3,973	-	5,737	-
United States					
Flour in terms of wheat	31,671	27,175	-	103,212	-
For milling in bond 4/	-	-	823,778	-	1,143,499
For domestic use 4/	-	-	57,934	-	132,334
Virgin Islands	-	2,295	-	6,709	-
Oceania					
French Oceania	12,654	-	-	-	-
Guam	1,724	2,304	-	6,287	-
South America					
Chile	-	-	-	1,836	-
Colombia	129,771	83,736	128,122	248,481	591,991
Ecuador	-	1,377	-	1,377	-
Peru	2,524	571	-	14,890	-
Surinam	19,219	7,232	-	49,698	-
Venezuela	382,194	357,790	2,666	885,051	2,666
Totals, Foreign Countries	1,633,262	1,600,223	13,246,397	4,371,980	35,440,935
Totals, All Countries	3,393,495	3,596,153	20,927,628	10,555,466	62,731,517

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 equals 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			
	Nov. 6	Nov. 13	Nov. 20	Nov. 27
<u>Initial Payment to Producers</u> - cents and eighths per bushel -				
1 Northern	140	140	140	140
2 Northern	137	137	137	137
3 Northern	134	134	134	134
4 Northern	126	126	126	126
5 Wheat	112	112	112	112
6 Wheat	106	106	106	106
Feed Wheat	100	100	100	100
1 C.W. Garnet	134	134	134	134
2 C.W. Garnet	131	131	131	131
1 Alberta Red Winter ..	137	137	137	137
2 Alberta Winter	134	134	134	134
1 C.W. Amber Durum	150	150	150	150
2 C.W. Amber Durum	147	147	147	147
3 C.W. Amber Durum	140	140	140	140
<u>International Wheat Agreement and Domestic Sales</u>				
1 Northern	169/7	169/7	169/7	170
2 Northern	164/7	164/7	164/7	165
3 Northern	162/7	162/7	162/7	163
4 Northern	158/7	159/7	159/7	160
5 Wheat	157/7	157/7	157/7	158
6 Wheat	151/7	151/7	151/7	152/6
Feed Wheat	148/7	148/7	148/7	149
1 C.W. Garnet	157/7	157/7	157/7	158
2 C.W. Garnet	156/7	156/7	156/7	157
3 C.W. Garnet	155/7	155/7	155/7	156
1 Alberta Red Winter ..	157/7	157/7	157/7	158
2 Alberta Winter	155/7	155/7	155/7	156
3 Alberta Winter	153/7	153/7	153/7	154
1 C.W. Amber Durum 1/..	198/7	198/7	198/6	198/5
2 C.W. Amber Durum 1/..	196/7	196/7	196/7	197
3 C.W. Amber Durum 1/..	195/7	195/7	195/7	196
<u>Exports - Class II</u>				
1 Northern	169/7	169/7	169/7	170
2 Northern	164/7	164/7	164/7	165
3 Northern	162/7	162/7	162/7	163
4 Northern	158/7	159/7	159/7	160
5 Wheat	157/7	157/7	157/7	158
6 Wheat	151/7	151/7	151/7	152/6
Feed Wheat	148/7	148/7	148/7	149
1 C.W. Garnet	157/7	157/7	157/7	158
2 C.W. Garnet	156/7	156/7	156/7	157
3 C.W. Garnet	155/7	155/7	155/7	156
1 C.W. Amber Durum	270	270	270	270
2 C.W. Amber Durum	268	268	268	268
3 C.W. Amber Durum	267	267	267	267

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			
	Nov. 6	Nov. 13	Nov. 20	Nov. 27
- cents and eighths per bushel -				
<u>Initial Payment to Producers</u>				
1 Northern	140	140	140	140
2 Northern	137	137	137	137
3 Northern	134	134	134	134
4 Northern	126	126	126	126
5 Wheat	112	112	112	112
6 Wheat	106	106	106	106
Feed Wheat	100	100	100	100
1 C.W. Garnet	134	134	134	134
2 C.W. Garnet	131	131	131	131
1 Alberta Red Winter ..	137	137	137	137
2 Alberta Winter	134	134	134	134
1 C.W. Amber Durum	150	150	150	150
2 C.W. Amber Durum	147	147	147	147
3 C.W. Amber Durum	140	140	140	140
<u>International Wheat Agreement and Domestic Sales</u>				
1 Northern	175/7	175/7	175/7	176
2 Northern	169/7	169/7	169/7	170
3 Northern	167/7	167/7	167/7	168
4 Northern	163/7	163/7	163/7	164
5 Wheat	157/7	157/7	157/7	158
6 Wheat	151/7	151/7	151/7	152/6
Feed Wheat	148/7	148/7	148/7	149
1 C.W. Garnet	157/7	157/7	157/7	158
2 C.W. Garnet	156/7	156/7	156/7	157
3 C.W. Garnet	155/7	155/7	155/7	156
1 Alberta Red Winter ..	161/7	161/7	161/7	162
2 Alberta Winter	159/7	159/7	159/7	160
3 Alberta Winter	157/7	157/7	157/7	158
<u>Export - Class II</u>				
1 Northern	175/7	175/7	175/7	176
2 Northern	169/7	169/7	169/7	170
3 Northern	167/7	167/7	167/7	168
4 Northern	163/7	163/7	163/7	164
5 Wheat	157/7	157/7	157/7	158
6 Wheat	151/7	151/7	151/7	152/6
Feed Wheat	148/7	148/7	148/7	149
1 C.W. Garnet	157/7	157/7	157/7	158
2 C.W. Garnet	156/7	156/7	156/7	157
3 C.W. Garnet	155/7	155/7	155/7	156
1 Alberta Red Winter ..	161/7	161/7	161/7	162
2 Alberta Winter	159/7	159/7	159/7	160
3 Alberta Winter	157/7	157/7	157/7	158

CANADIAN FLOUR MILLING SITUATION

Production The production of wheat flour reported by Canadian mills for October, 1954 amounted to 1,934,000 barrels, slightly above both the September, 1954 output of 1,929,000 barrels and the October, 1953 output of 1,912,000 barrels. The ten-year (1944-45-1953-54) average production for the month of October was 2,140,000 barrels. Mills reporting operations during October, 1954 had a total rated capacity of 97,174 barrels per 24-hour day, and on the basis of a 25-day working period, 79.6 per cent of this rated capacity was effective.

Wheat milled for flour during the month amounted to 8.5 million bushels as against 8.6 million bushels milled during the preceding month and 8.4 million bushels milled during October last year. Of the wheat milled for flour during October, 1954 some 7.8 million bushels were Western Canadian Spring Wheat (other than Durum). Most of the balance consisted of Ontario Winter Wheat (588,000 bushels) and Durum wheat (62,000 bushels).

Exports According to preliminary customs returns, exports of Canadian wheat flour in October, 1954 amounted to 799,145 barrels (3,596,000 bushels of wheat equivalent), slightly in excess of flour exports in the preceding month. Flour shipments during the month went to 48 countries, with the United Kingdom accounting for 1.3 million bushels of wheat equivalent, or 36 per cent of the total. Other countries receiving shipments of one hundred thousand bushels or more, were as follows, in thousands of bushels: Philippine Islands, (575); Venezuela, (358); Trinidad and Tobago, (184); Jamaica, (105); and Ceylon, (100).

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	91,855,269	20,800,974	10,276,951
1954-55 ^{2/}			
August	8,059,773	1,812,296	751,126
September	8,581,211	1,929,031	795,388
October	8,543,804	1,934,482	799,145
Totals	25,184,788	5,675,809	2,345,659
Same period 1953-54 (revised)	22,454,396	5,074,883	2,512,414

^{1/} Based on Customs returns. Exports for the crop years 1945-46-1953-54 revised to remove effect of time lag in the returns made by Customs.

^{2/} Subject to revision.

UNITED STATES SITUATION

Supply Position With no further revisions in the 1954 wheat crop estimate of 959.3 million bushels, total estimated domestic supplies of wheat in the United States for the current crop year, at 1,862.2 million bushels were unchanged from a month ago. Imports of wheat from Canada for all purposes during the July—October period of 1954 amounted to 0.3 million bushels. After deducting anticipated domestic requirements of 660.0 million bushels, some 1,202.5 million remain available for export and for carryover during 1954-55 compared with 1,114.4 million bushels available during 1953-54.

United States Wheat Supplies

Item	1953-54	1954-55 ^{1/}
- million bushels -		
Carryover at beginning of crop year (July 1)	562.5	902.9
New crop	1,168.5	959.3
Total estimated domestic supplies	1,731.0	1,862.2
Imports of wheat for domestic use, July—October	0.7	0.3
Total estimated supplies ^{2/}	1,731.7	1,862.5
Less estimated domestic requirements for crop year ^{3/}	617.3	660.0
Available for export and for carryover	1,114.4	1,202.5
Deduct:		
Exports of wheat as grain, July—October	70.6	56.8
Exports of wheat flour and products in terms of wheat, July—October	10.1	11.8
Total exports of wheat, wheat flour and products	80.7	68.6
Balance on November 1 for export and for carryover	1,033.7	1,133.9

^{1/} Preliminary.

^{2/} Excluding imports for November—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.

Exports of wheat, wheat flour and products in terms of grain equivalent during the July—October period of the current crop year amounted to 68.6 million bushels as against exports of 80.7 million during the same months of the preceding crop year. The balance remaining on November 1, 1954 for export and for carryover was estimated at 1,133.9 million bushels compared with 1,033.7 million on the same date a year ago.

Flour Production The Bureau of the Census, Department of Commerce, estimated wheat flour production in the United States in September, 1954 at 19,733,000 sacks, an average of 940,000 sacks per working day. This compares with a daily average of 854,000 sacks during the previous month, and 927,000 sacks in September, 1953. Production of wheat flour in September was at 88.2 per cent of capacity, compared with 80.4 per cent the previous month and 86.8 per cent in the same month a year ago.

Flour mills in September ground 45,846,000 bushels of wheat, compared with 43,752,000 bushels in August. Wheat offal output in September amounted to 397,086 tons. These figures represent production of all commercial mills in the United States. About 97 per cent of the total is reported by the 375 largest mills and the balance is estimated. The estimated portion is based on a survey of the smaller mills in 1950.

U.S. and Turkey
Barter Grains

The New York Journal of Commerce reports that details of an agreement signed by the United States Government with the Government of Turkey providing for the movement to Turkey of \$35 1/2 million of wheat and feed grains have been announced by the United States Department of Agriculture. This is the first formal agreement to be signed with a foreign government in furtherance of the Agricultural Trade Development and Assistance Act of 1954 (Public Law 480, 83rd Congress).

The agreement covers barter or sale for Turkish lira of approximately 300,000 metric tons (approximately 11 million bushels) of wheat and 200,000 metric tons (approximately 11 million bushels) of feed grains.

The agreement is made up of two parts. Part I authorizes these three immediate transactions:

- (a) The Commodity Credit Corporation acting under Section 303 of P.L. 480, is undertaking the barter of approximately 100,000 tons of wheat for Turkish chrome ore, the ore to be used within the United States stock-piling program. This barter is being carried out through private U.S. trade.
- (b) The Foreign Operations Administration, acting under Public Law 665 (Mutual Security Act), will finance the export and sale of 30,000 tons of wheat, and lira received will be used in support of Turkish armed forces.
- (c) The Department of Agriculture, under Title I of P.L. 480 will finance the export of 70,000 tons of wheat and 125,000 tons of feed grains to Turkey. Half of the lira received will be used in meeting United States obligations and the remainder in furthering Turkish development.

Part II of the agreement provides conditional authority for meeting the balance of Turkey's emergency requirements. It will become effective early in 1955, if present conditions continue and makes provision for another 100,000 tons of wheat and 75,000 tons of feed grains.

Turkey, which since the end of the war had become the free world's fourth largest exporter of cereal grains, recently experienced drought in principal grain areas. Under the arrangement, Turkey will use domestically all grain received from the United States and will cease exporting grains until July 1, 1955, except for two small commitments made last year.

Outlook for 1955
Winter Wheat Crop

According to the November 1 crop report issued by the United States Department of Agriculture, prospects for winter wheat and other fall-sown grains, as of November 1, vary almost directly with the amount and distribution of fall precipitation. The outlook is good to excellent east and north from the dry Central and Southern Great Plains, but uncertain in western parts of Oklahoma, Kansas, and parts of Texas, New Mexico, and eastern Colorado. Soil moisture supplies are generally favourable and more abundant than a year ago in most northern and northeastern States. Fall-seeded legumes and grasses in these areas have germinated and grown well and are in good condition for winter survival.

The Weekly Weather and Crop Bulletin issued on November 29 by the United States Department of Commerce states that continued warm, dry, sunny weather for the third consecutive week and several windy days during the past week increased the moisture deficiency over the Great Plains, especially the western portion where the situation is becoming critical with some wind erosion. In the drier region, consisting of the western portions of Nebraska, Kansas, and Oklahoma, northwestern Texas, eastern sections of Wyoming and Colorado, and some adjacent areas, wheat is still in mostly fair condition but made only poor progress with some local deterioration during the week. Elsewhere over the Great Plains, the crop generally made fair to good growth and is in mostly good condition, although the dry weather limited grazing in many sections. All of the intended wheat acreage has not yet been seeded in Oklahoma on account of the dryness.

Small grains show a general improvement over the eastern portion of the Country due to recent rains, particularly in the South where previous dryness retarded seeding, germination, and growth. Parts of this latter region still need more moisture. Wheat is in satisfactory condition in the North.

In the Pacific Northwest small grains are making favourable progress, under the influence of much mild weather and mostly ample moisture.

Continued from Page 1

According to trade reports at November 30, wintry conditions were delaying seeding in many parts of Europe. It was considered probable that a number of countries may not be able to fulfil their intentions regarding fall plantings and that an increased proportion of the overall acreage for 1955 will be spring sown. Yields from spring plantings on the continent are usually less satisfactory than from fall seedings. In Italy, however, the acreage planted to wheat is estimated to be about equal to that of a year ago.

Recent rains have relieved dryness in a number of districts of South Africa but drought persists in the western Transvaal and the Free State and is delaying corn planting.

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
November 1, 1954	249 3/4 - 253 3/4	November 1, 1954	246 1/2 - 248 1/2
2	Election Day	2	Election Day
3	237 1/2 - 252	3	243 7/8 - 244 7/8
4	234 - 262 1/2	4	243 7/8 - 244 7/8
5	234 1/4 - 245 1/4	5	243 7/8 - 244 7/8
8	233 1/4 - 237 1/4	8	243 1/2 - 244 1/2
9	235 3/4 - 255 1/2	9	245 3/8 - 246 3/8
10	237 1/2	10	247 7/8 - 248 7/8
11	237 3/4 - 279 3/4	11	250 3/8 - 251 3/8
12	236 1/2 - 280	12	252 - 253
15	236 1/4 - 249 1/4	15	249 3/8 - 250 3/8
16	238 - 259 1/2	16	248 1/2 - 249 1/2
17	244	17	248 1/4 - 249 1/4
18	238 - 239	18	248 1/2 - 249 1/2
19	242 - 253	19	248 - 249
22	238 1/2 - 244 1/2	22	245 5/8 - 246 5/8
23	236 1/4 - 255	23	245 1/4 - 246 1/4
24	237 - 246	24	245 3/4 - 246 3/4
25	Thanksgiving Day	25	Thanksgiving Day
26	237 1/2	26	246 1/4 - 247 1/4
29	237 - 237 1/4	29	246 3/4 - 247 3/4
30	239 1/2 - 272 1/4	30	248 5/8 - 249 5/8

Chicago Wheat Futures, High Points of Closing

Date	December	March	May	July	September
		- cents and eighths per bushel -			
November 1, 1954	222/4	226	222	210/3
2		Election Day		
3	222/3	224/6	221/4	209/7
4	223/7	226/3	223/6	212
5	223/4	226/1	222/6	210/5
8	222/5	225/1	221/6	210/1
9	224/4	227/1	223/6	211/3
10	225/7	228/4	224/5	211/6
11	227/3	229/6	225/4	212/2
12	226/6	228/7	224/7	212
15	227/4	229/3	225/4	213/6
16	229/4	231	226/7	214/1
17	229/3	230/4	226/3	213/6
18	229/4	230/6	226/6	214
19	229/2	230/4	227/2	214/7
22	226/6	228/4	225/6	213/6
23	226/5	228/6	226	213/5
24	227/4	229/2	226/4	214/5
25		Thanksgiving Day		
26	227/5	229/6	227/3	214/7
29	227	229/3	226/6	213/7
30	228/3	230/5	228/2	215/1
					217
					216
					217/2

AUSTRALIAN SITUATION

Supply Position Total estimated wheat supplies in Australia for the 1953-54 crop year amount to 234.7 million bushels, consisting of the December 1, 1953 carryover of 35.7 million bushels and the 1953 crop of 199.0 million. After deducting anticipated domestic requirements of 72.4 million bushels, some 162.3 million were available for export and for carryover during 1953-54, compared with 140.0 million available during the preceding crop year. Exports of wheat as grain and wheat flour in terms of wheat equivalent during the period December 1, 1953 to November 6, 1954, totalled 62.9 million bushels, sharply below the comparable 1952-53 level of 96.2 million bushels. The balance on November 7, 1954 for export and for carryover at the end of the crop year amounted to 99.4 million bushels, more than twice as great as the 43.8 million available at the same date a year ago.

Australian Wheat Supplies

Item	1952-53	1953-54 1/
	- million bushels -	
Carryover, including flour as wheat, at beginning of crop year (December 1)	18.0	35.7 2/
New crop	195.2	199.0
Total estimated supplies	213.2	234.7
Less estimated domestic requirements for crop year	73.2 2/	72.4 2/
Available for export and for carryover	140.0	162.3
Deduct:		
Exports of wheat as grain, December 1 to November 6 ..	56.7	36.4
Exports of wheat flour in terms of wheat, December 1 to November 6	39.5	26.5
Total exports of wheat and wheat flour	96.2	62.9
Balance on November 7 for export and for carryover	43.8	99.4

1/ Preliminary. 2/ Revised.

The following account of the Australian situation has been extracted from a report from Mr. R. W. Blake, Commercial Secretary for Canada, Melbourne, under date of November 16, 1954 and is reproduced with the permission of the Trade Commissioner Service, Department of Trade and Commerce. Currency conversions have been made at the rate of £1 equals \$2.1710 (Canadian), the quotation in effect on October 29, 1954.

Crop Prospects and Pastoral Conditions It is now estimated that this year's Australian wheat harvest will total about 140 million bushels.

Victoria.- Unexpected heavy and widespread rainfall received in Victoria in the last week of October saved the wheat harvest and revived pastures. In the Wimmera, the "bread basket of Victoria", the rain was better than average, but it came too late in the far northwest to be of much help. During October, more than £100,000 (\$217,000) worth of wheat was destroyed by heavy frost in the central Wimmera. A wheat crop of at least 40 million bushels seems assured, and may total 43 million bushels. Pastures in the later districts in Victoria were in good condition to

respond to the late October rains, and with normal November rains, they should make excellent spring growth. In the earlier districts, however, pastures are unlikely to make any material recovery.

New South Wales.- The droughty conditions prevailing in New South Wales ended about the middle of October, since when rain has fallen at frequent intervals, but unfortunately the break in the weather came too late to be of maximum benefit to wheat and oat crops. A "below average" harvest is expected, which may realise upwards of 30 million bushels. The land fallowed in preparation for the 1955 crop is relatively small. The pastoral outlook is assured for the summer, as a result of the heavy rains received during the past month.

South Australia.- Abnormally dry conditions prevailed in South Australia during September and up to the middle of October, but the weather has been generally cool since then with an absence of damaging hot winds. Wheat prospects are fairly good, the crops having come through the dry conditions well. Pastures have shown improvement in the Lower North and Yorke Peninsula, while in the southeast no serious feed shortage is likely for the present.

Western Australia.- Crop prospects in Western Australia deteriorated with the absence of good finishing rains in September and October, and the marketable wheat harvest is not expected to exceed 29 million bushels. With the exception of July, the rainfall has been much below average and the almost total absence of good finishing rains played havoc with crops on heavier land. The pastoral outlook is not promising.

Queensland.- At the end of October, it was announced by the Queensland Wheat Board that Queensland wheat crops were better than average and prospects were bright for a record harvest. However, unseasonable wet weather in early November caused widespread damage from rust on the Darling Downs. It is conservatively estimated that the wheat crop will total at least 15 million bushels. Because of the volume of wheat to be harvested in bulk this season, Queensland wheat growers will be restricted to a delivery of bulk grain not exceeding 15 bushels to the acre. The balance would either have to be bagged or stored on the farms.

Central Australia.- Splendid rains were received over a huge region of central Australia during October, extending over thousands of miles, but as yet no rain has been reported from the far north-eastern area. Western and southern areas of the Alice Springs district are in a sound position, but many places in the north and north-east are in a dangerously dry state and stock losses are inevitable.

Wheat Sales During the past month further satisfactory sales of Australian wheat were made to United Kingdom and Continental buyers. It is reported that the Australian Wheat Board was finding some difficulty in chartering sufficient ships to move the numerous purchases of Australian wheat by India during the past three months, as freights had advanced heavily. Freights for Australia-United Kingdom cargoes of Australian wheat and barley had been arranged at 102/6d. (\$11.13) to 110/- (\$11.94) per long ton, whereas 6 months ago, the rates were about 70/- (\$7.60).

Australian Wheat Stabilization Plan "Foreign Crops and Markets" reports that a Bill was introduced in the Australian House of Representatives on October 20 to write into law a Five-Year Wheat Stabilization Plan. This action followed a growers referendum in which wheat farmers voted 46,584 to 2,930 in favour

of the plan. The Bill, quick approval of which is expected, will guarantee cost of production returns to growers for domestic sales and exports of up to 100 million bushels per year for a period of five years starting with the present crop year.

ARGENTINE SITUATION

Supply Position According to the second official estimate of production, the 1953 Argentine wheat crop is now placed at 227.8 million bushels, an increase of 7.3 million over the previous estimate. With carryover stocks of 58.0, total estimated supplies for the 1953-54 crop year amounted to 285.8 million bushels. After deducting anticipated domestic requirements of 128.6 million bushels, some 157.2 million remained for export and for carryover during the 1953-54 crop year compared with 140.8 million the previous season. Exports of wheat as grain and wheat flour in terms of wheat equivalent during the December-October period of the current crop year totalled 100.8 million bushels as against 71.4 million during the same months of 1952-53. The balance on November 1, 1954 for export and for carryover at the end of the crop year amounted to 56.4 million bushels compared with 69.4 million available at the same date a year ago.

Argentine Wheat Supplies

Item	1952-53	1953-54 <u>1/</u>
	- million bushels -	
Carryover at beginning of crop year (December 1)	1.8	58.0 <u>2/</u>
New crop	280.5	227.8 <u>3/</u>
Total estimated domestic supplies	282.3	285.8
Imports of wheat for domestic use	-	-
Total estimated supplies	282.3	285.8
Less estimated domestic requirements for crop year	141.5	128.6
Available for export and for carryover	140.8	157.2
Deduct:		
Exports of wheat as grain, December—October	71.4	97.9
Exports of wheat flour in terms of wheat, December—October	<u>4/</u>	2.9
Total exports of wheat and wheat flour	71.4	100.8
Balance on November 1 for export and for carryover	69.4	56.4 <u>5/</u>

1/ Preliminary.

2/ Revised stock estimate.

3/ Second official estimate.

4/ Less than 50,000 bushels.

5/ Approximately 800,000 metric tons (29,395,000 bushels) have been sold and not yet shipped. However, part of this quantity may be shipped from the 1954-55 crop.

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 November 16, 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 Light but useful rains have fallen in much of the grain zone during the past month, which, accompanied by somewhat warmer weather, have benefited the crops in most sections. Fairly heavy frosts at the end of October may have done local damage as the grains were just in the milk stage but the overall effect could not be great. Harvesting of wheat has begun in the northern zone and scattered reports suggest yields well above last year. Corn and sunflower crops are developing well.

The following comments summarize very briefly the observations regarding grain made during a tour of the southern grain crescent at the end of October. Last year this area contained approximately the following percentages of total Argentine seedings: Flaxseed 20 per cent, rye 25 per cent, wheat 40 per cent, oats 50 per cent and barley 70 per cent.

Most of the zone suffered from dryness, in the early part of the season, which prevented the preparation of the land for seeding. This period was followed by persistent rains which further delayed seedings. This lateness was partially responsible for the reduction in area planted to grains and in the eastern section has caused some durum type wheat to be planted in lieu of bread type. Relatively cool weather in recent weeks with adequate rainfall has permitted the crops to develop to a state which is generally regarded as excellent and in some areas optimum. Especially in the eastern part of the zone the crops are about three weeks behind last year but this is not considered to be a serious handicap. In the western sector good weather in recent weeks has allowed the grains to regain most of the time lost earlier in the season.

Acreage and Production Estimates The first official estimates of seeded area for this year for wheat and flaxseed have been announced, together with revisions in the seeding and production estimates for these and other grains for last year. These figures are given below:

Official Estimates

Grain	Area Sown		Production 1953-54	
	1953-54 Revised	1954-55	Previous Estimate	Latest Estimate
	- thousand acres -		- thousand bushels -	
Wheat	15,694	15,157	220,462	227,811
Flax	1,809	1,936	13,684	16,141
Oats	3,705	*	62,248	64,271
Barley	2,679	*	38,075	41,042
Rye	6,040	*	25,306	23,904
Corn	8,177	*	188,966	185,344

*Not yet available.

Wheat: 1954-55 Crop Generally favourable weather conditions in most of the wheat zones have permitted further development of the crop which is now being harvested in the northernmost sectors. Frosts at the end of October in northern Buenos Aires and Southern Santa Fé may have been fairly destructive but as those areas are outside the zones of heaviest production, the overall effect could not be great. Two official estimates of seeded area have been published during the month, the latest being 6,136,300 hectares (15,157,000 acres). This is practically identical with the first estimate for last year but 3.4 per cent less than the most recent estimate of 6,353,900 hectares (15,694,000 acres).

Scattered reports of yields from the north indicate increases above last year of up to 30 per cent. Trade and Government officials alike are quite optimistic about the prospects and unofficial estimates of production average at least 7 million metric tons (257 million bushels).

Policy Reserve Wheat Exported.- It is reliably reported that at least one set of underground silos has been opened and that wheat is being discharged from them for export at the rate of 500 tons (18,000 bushels) per day. As complete data on the extent of these shipments are not obtainable, no further special reference will be made in the table on 'Argentine Wheat Supplies' to the 400,000 tons (14,697,000 bushels) originally reported to have been set aside in these silos as a reserve.

Freight Rates Increase.- Effective November 15 all rail freights have been increased by 30 per cent. Since the guaranteed producer prices are based on delivery at port under present regulations, the producers will bear the brunt of this increase. In Argentina an increasing proportion of grain is being hauled to port by trucks and statistics are not yet available which would permit an assessment of the net effect of the freight increase on the farmers' average return.

Sales Wheat and Corn.- I.A.P.I. has not yet returned to the market in these crops but the trade still expects the Institute to ask for offers on old crop corn and, of course, new crop wheat.

Oats, Barley and Rye.- I.A.P.I. re-entered the market on November 2 for oats, barley and rye, and during the first of the day's sessions sold 40,000 metric tons each (2,594,000 and 1,837,000 bushels) of oats and barley at 56 dollars and 58 dollars per ton (86 cents and \$1.26 per bushel) f.o.b., respectively, and 18,000 tons (709,000 bushels) of rye at 57.70 dollars (\$1.47 per bushel). Later in the day identical quantities were sold at 57.52 dollars, 59.16 dollars and 59.50 dollars, (89 cents, \$1.29 and \$1.51 per bushel), respectively. The prices thus increased by some 2 to 3 per cent; the currencies involved in each case were Western German agreement dollars and sterling.

Grain Shipments Although wheat and corn shipments in October at 295,504 tons (10,858,000 bushels) and 276,132 tons (10,871,000 bushels), respectively were somewhat less substantial than the previous month, the total for all grains at 642,945 tons brought the cumulative total for the first ten months of the year to 6,028,860 tons compared with only 3,412,451 tons in the corresponding period of 1953.

Wheat shipments in October were destined principally for Brazil 94,985 tons (3,490,000 bushels) and Chile 49,656 tons (1,825,000 bushels). Italy, Germany, Belgium and Japan followed with 23,064 tons (847,000 bushels), 22,134 tons (813,000 bushels), 20,218 tons (743,000 bushels), and 19,600 tons (720,000 bushels), respectively. Germany and the United Kingdom were the chief outlets for corn in October with 67,291 tons (2,649,000 bushels) and 47,988 tons (1,889,000 bushels) while Belgium and the Netherlands received 36,690 tons (1,444,000 bushels) and 36,598 tons (1,441,000 bushels), respectively.

Rye and barley shipments, although on a limited scale, were slightly up from the previous month and of the totals of 5,661 tons (223,000 bushels) and 30,856 tons (1,417,000 bushels), respectively, Italy and Austria were the chief customers for the rye and Germany received the major portion of barley. Oats shipments continued to decline with the Netherlands receiving 18,831 tons (1,221,000 bushels) of the total of 34,792 tons (2,256,000 bushels).

The following table gives shipments of all grains from Argentina in the first ten months of 1954 by destination. These figures must be taken as provisional, being compiled from trade statistics which are subject to amendment:

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

Destination	Wheat	Corn	Flax	Oats	Rye	Barley
- thousand bushels -						
Austria	613	905	-	1,916	246	644
Belgium	5,492	6,594	-	6,429	4,562	4,275
Brazil	18,874	-	-	224	-	-
British Africa	638	-	-	-	-	-
Canary Islands	-	1,120	-	-	-	-
Chile	6,345	-	-	-	-	-
China	275	-	-	-	-	-
Czechoslovakia	92	453	-	-	-	-
Denmark	2,343	1,510	-	5,893	2,128	1,277
Finland	-	433	-	32	1,335	-
France	96	6,269	436	71	-	53
French Africa	-	69	-	-	-	-
Germany	17,707	11,455	-	3,189	1,745	10,843
Hungary	638	766	-	143	1,233	595
India	333	-	-	-	-	-
Israel	-	-	-	-	404	-
Italy	903	2,671	-	1,601	4,770	177
Japan	7,742	3,690	-	-	12	-
Malta	187	-	-	-	-	-
Netherlands	4,733	10,045	-	14,954	4,483	7,027
Norway	-	821	-	-	394	-
Paraguay	1,559	-	-	-	-	-
Peru	5,588	73	-	-	-	-
Poland	1,864	-	-	-	9,167	-
Sweden	-	881	-	564	-	-
Switzerland	1,888	892	-	5,410	172	1,083
United Kingdom	9,406	14,102	-	-	227	2,320
United States	-	-	-	1,539	-	-
Totals	87,313	62,748	436	41,965	30,878	28,295
Same period: 1953 ...	71,210	32,070	390	8,504	6,111	16,697
1952 ...	2,265	20,954	1,025	2,837	4,394	4,806
1951 ...	85,544	8,004	6,537	5,113	6,985	3,807
1950 ...	90,412	30,965	2,492	21,562	6,192	3,609
1949 ...	56,647	31,639	-	8,022	6,596	8,485

FRENCH SITUATION

The following account of the current crop situation in France has been extracted from reports provided by Miss V. F. Wightman, Commercial Secretariat, Canadian Embassy, Paris, under dates of November 19 and 22, 1954, and is reproduced with the permission of the Trade Commissioner Service, Department of Trade and Commerce. Where possible, conversions from French to Canadian measures have been made and rounded for the convenience of our readers. Currency conversions have been made at the rate of one franc equals .00277 Canadian dollars, the rate in effect on November 12, 1954.

Crop Production The weather this fall has been generally fine and mild, which has been favourable to seeding of grains, although in some sectors there has been some delay due to the late harvest of corn and sugarbeet. There would appear to be no great change in the area sown, except for rapeseed which shows a small increase due to new government policy of encouraging oilseeds.

The November 1 Ministry of Agriculture report indicates record crops and yields this year both for wheat and barley. Contrary to earlier expectations, corn too shows improved yields and output. The progress registered in recent years is shown below.

	Yield per Acre			Production		
	Average 1949-53	1953	1954	Average 1949-53	1953	1954
	- bushels -			- thousand bushels -		
Wheat	28.1	31.7	34.9	296,168	330,294	386,515
Barley	31.2	34.6	37.7	79,325	102,831	115,812
Oats	39.1	42.2	43.8	223,639	237,494	231,167
Corn	24.1	34.1	34.3	20,285	31,597	34,283
Rye	13.9	16.4	14.0	3,388	3,752	2,993

Marketing and Production Policy

Emerging this year as a substantial wheat exporter, France has recently taken a number of measures to bring production into line with markets and to make French wheat more acceptable abroad.

On the basis of the latest official estimate of 10.5 million metric tons (385.8 million bushels) for the 1954 crop, the French Grain Board expects to receive around 7.2 - 7.3 million metric tons (264.6 - 268.2 million bushels) from farmers. Home consumption lies around 5 million tons (183.7 million bushels) so even with 300,000 tons (11.0 million bushels) for the French Overseas Territories, there should still be about 2 million tons (73.5 million bushels) for export or carryover. The present pricing system plus government assistance should allow for the export of 1.2 million tons (44.1 million bushels), but this will still leave a fair quantity to be added to the carryover of 800,000 tons (29.4 million bushels) at the beginning of the new crop year, August 1.

In order to prevent any large surplus accumulating, the French government has announced that the maximum quantity the Grain Board will buy of the 1955 crop at the guaranteed support price is 6.8 million metric tons (249.9 million bushels). This represents a compromise between the producers' association and the government's determination to keep wheat output at a manageable level.

In addition, now that the expansion program is coming into full stride, emphasis is being placed on quality. The Board will no longer buy grain grading less than "soft wheat good, sound, and merchantable, at a specific weight of at least 75 kilos per hectolitre (60 pounds per bushel) having the moisture content and baking qualities specified by decree". Wheat rejected by the Board will be classed as feed and sold freely for whatever price can be obtained.

Application of Quota to 1955 Crop.- With limitation of the support price to 6.8 million metric tons (249.9 million bushels) of the 1955 crop, the government has issued recently instructions on its application. Before October 1, 1955, the Grain Board is required to estimate probable farmers' deliveries. If this estimate is equal to or below the quota of 6.8 million tons (249.9 million bushels), farmers will receive the full support price determined in accordance with the terms of the Grain Plan. If, however, estimated marketings appear to surpass this figure, the following provisions apply:

- (1) the first part of individual deliveries, determined as a percentage of the quota against estimated marketings, will receive the full price,
- (2) for the remainder, the farmers will receive on June 1, 1956 the average weighted price of exports from August 1955 to May 1956. For wheat delivered before October, the storage entities are required to make an interim payment which is usually two-thirds of the basic price—for 1954 it was 2400 francs per quintal (\$1.81 per bushel).

Support Price Limited to Quality Grain.- For future crops, the French Government has announced price differentials in accordance with the baking quality of the grain. Wheat grading below 60 as determined by the French "Chopin" method will

not qualify for the support price and can be sold freely as feed. On the other hand, wheat grading over 120 by the same system will receive bonuses to be announced later. Wheat grading between 60 and 80 will suffer a rebate from the official price level. These grades may be adjusted either way by up to 10 points in relation to the general quality of each crop.

In order to give producers time to switch to seed with better baking qualities, for the 1955 crop, the standard is lowered by the full 10 points, making wheat grading at 50 eligible for the support price. During 1955 these price differentials will be applied to wheat ex-warehouse or co-operative and for successive crops to deliveries by farmers.

Tolerance of Bread Beans Cut.- As of November 1, the proportion of bread beans which may be incorporated in flour is limited to 2 per cent. The previous limit was 5 per cent but this was rarely reached; this new measure is designed to encourage the use of domestic wheat. These beans are understood to be a type of large Lima bean and claimed to be useful as a bread softener; their use presumably dates from the war shortages.

New Export Grades.- With the growing export surplus available from France, the Grain Board has established export grades as follows:

- Grade 1 - Wheat with a moisture content up to 15.5 per cent, minimum specific weight of 76 kilos per hectolitre (61 pounds per bushel), maximum 2 per cent damaged kernels.
- Grade 2 - Wheat with a moisture content up to 16.5 per cent, minimum specific weight of 75 kilos per hectolitre (60 pounds per bushel), maximum 4 per cent damaged kernels.
- Grade 3 - Wheat with a moisture content up to 17.5 per cent, minimum specific weight of 73 kilos per hectolitre (58 pounds per bushel), maximum 6 per cent damaged kernels.
- Outside Grade - Such wheat will be sold on the basis of agreement between interested parties.

Grain Board Powers Modified.- By a decree dated November 4 the powers of the French Grain Board have been modified to give the Government more control. The Board is controlled by a Council which last year reverted to its pre-war status as an interprofessional body, that is, composed proportionately of producers, dealers, millers and government representatives.

The new decree states that unless the Council can resolve a problem presented to them within a period of 15 days, their authority on this matter will pass to the Minister of Agriculture. Furthermore, if the Council disagrees with the policy formulated by the Minister, it will be called into session again with 8 days to reconsider their stand. These measures are described officially as removing any obstacle to the powers of the Minister in matters of grain policy.

Foreign Trade in Grains.- The following figures covering the French grain trade during the first eight months of this year show the very considerable improvement over the same period last year.

	8 Months 1953		8 Months 1954	
	Quantity	Value	Quantity	Value
	'000 bu.	'000 \$	'000 bu.	'000 \$
<u>FOREIGN COUNTRIES</u>				
	<u>Exports</u>			
Soft Wheat	6,940	16,188	26,181	45,258
Durum Wheat	-	-	205	374
Mixed Wheat and Rye	-	-	34	59
Barley	30	75	2	6
Oats	4	7	134	116
Corn	1	3	1/	3

8 Months 1953		8 Months 1954	
Quantity	Value	Quantity	Value
'000 bu.	'000 \$	'000 bu.	'000 \$

FOREIGN COUNTRIES

<u>Imports</u>				
Soft Wheat	172	578	10	33
Durum Wheat	<u>1/</u>	2	116	294
Rye	508	1,134	85	111
Barley	1,023	2,000	126	190
Oats	30	49	20	29
Corn	10,560	26,001	6,399	11,791

TRADE WITH FRENCH UNION

<u>Exports</u>				
Soft Wheat	8	27	826	2,506
Durum Wheat	2	6	1	5
Barley	<u>1/</u>	<u>2/</u>	<u>1/</u>	1
Oats	5	9	4	7
Corn	16	60	3	20

<u>Imports</u>				
Soft Wheat	636	2,238	805	2,784
Durum Wheat	4,930	18,778	5,688	21,182
Rye	28	67	22	44
Barley	9,769	17,604	1,356	2,244
Oats	24	30	95	106
Corn	771	1,990	2,136	4,382

Source: French Statistical Office.

1/ Less than 500 bushels.

2/ Less than \$500.

SWEDISH SITUATION

The following report is abstracted from material provided by the Canadian Commercial Counsellor in Stockholm:

According to the harvest report of October 15 recently published the total harvest of bread grain this year is estimated at 1,339,000 metric tons—50,000 tons more than last year. That there was an increase in volume, despite considerable damage to the crops by rain in the summer and autumn, was due to the increased acreage. The area sown to bread grain increased by 62,000 hectares (153,000 acres) (12 per cent) as compared with 1953, of which 31,000 hectares (77,000 acres) was for autumn wheat, 14,000 hectares (35,000 acres) for spring wheat and 17,000 hectares (42,000 acres) for rye. On the other hand the acreage sown to fodder grain has shown a decrease of altogether 40,000 hectares (99,000 acres) of which 23,000 hectares (57,000 acres) was for barley and 13,000 (32,000 acres) for oats. The area sown to oleaginous plants has increased by about 13,000 hectares (32,000 acres) during the current year. The table given below quotes further details.

With regard to quality, this year's harvest is estimated to be only average and for some crops well under average. Rainfall in August was 18 per cent and in September 58 per cent higher than normal and as a result harvesting was considerably delayed, and in all districts wheat was damaged by fungus. The water content is reported to be high, which implies that difficulties with storage may arise. Both the potato crop and sugar beet have also been damaged by excessive rainfall.

The low quality harvest has already necessitated a purchase of 10,000 tons (394,000 bushels) of rye from Canada and in all probability a further import of 15,000 tons (591,000 bushels) of rye will be required at the beginning of next year. On the other hand, no imports of wheat will be required as the wheat crop was not damaged to such a great extent as the rye during the rainy period.

No increase in agricultural prices is implied, but owing to the imports of rye from Canada, the decrease in the price of rye planned for this autumn will have to be cancelled; Canadian rye fetches a price about 80 kronor per ton more than the Swedish.

	1 9 5 4		Production		
	Area	Average Yield	Average 1949-53	1953	1954 ^{1/}
	'000 acres	bu.	-'000 bushels -		
Autumn wheat	544	39.1	15,421	19,346	21,289
Autumn rye	360	33.1	9,940	11,590	11,913
Spring wheat	526	31.6	11,718	17,020	16,586
Spring rye	9	21.2	169	185	201
Barley	414	40.4	13,172	19,644	16,714
Oats	1,181	48.3	55,407	61,794	57,028

^{1/} Based on conditions at October 15.

NOTES ON THE WHEAT SITUATION IN OTHER COUNTRIES

South Africa A report from Johannesburg, dated October 21, places the area planted to wheat in the 1954-55 season at 1,350,000 morgen (2,857,000 acres) compared with 1,424,000 morgen (3,014,000) last season. The area planted in the Cape Province is 3 per cent less, in the Transvaal 20 per cent less and in the Orange Free State 5 per cent less. Total estimated areas, in acres, for the various Provinces, with the previous season's estimated areas in parentheses, are: Cape Province, 1,365,000 (1,410,000); Transvaal, 140,000 (174,000); and the Orange Free State, 1,352,000 (1,431,000).

Western Germany Official estimates place the 1953-54 acreage of wheat and spelt in Western Germany at 1,107,000 hectares (2.7 million acres) compared with 1,155,000 hectares (2.9 million acres) in the previous crop year. Preliminary production estimates indicate an outturn in 1954 of 2,867,000 tons (105.3 million bushels) as against 3,179,000 tons (116.8 million bushels) last year. Unless these provisional production figures prove quite wrong total wheat production has declined by about 300,000 tons (11.0 million bushels). Production of rye, on the other hand, has shown a remarkable rise of 730,000 tons (28.7 million bushels). Although this year's total grain crop rose in quantity from 11.9 million tons last year to a post-war record of 12.3 million tons, the story as regards quality is very different. The season was extremely wet. According to Mr. Bruce A. Macdonald, Canadian Commercial Counsellor in Bonn, there was scarcely a rainless day during July and August. Over many parts of the country rainfall was 150 to 160 per cent of normal. By the end of the summer it was widely believed that crop losses, not only of grain, but also of hay and of root crops, would be so heavy that farmers would suffer serious financial losses and that the government might have to adopt emergency measures to assist them.

As the autumn advanced it became clear that the overall situation would not be quite as disastrous as had been feared at first although many individual farmers would suffer severe losses, and might need individual assistance. The losses are due for the most part to deterioration in quality. Sprouting and high moisture content have seriously affected a good deal of the grain although no final figures are yet available as to the extent of this damage.

Probable Wheat Import Requirements.- Since a good deal of this year's wheat crop will be suitable only for feed or industrial uses there is little doubt that the demand for imported wheat during the current crop year will be somewhat greater than last year. Experienced observers in the trade have estimated this demand as low as 2.4 and as high as 2.7 million metric tons or between 86 and 97 million bushels. The following figures compare these estimates with actual wheat imports in recent years.

West German Wheat Imports

<u>Year</u>	<u>Quantity</u>	<u>Quantity</u>
	'000 metric tons	million bushels
1950-51	2,293	84.3
1951-52	2,224	81.7
1952-53	2,280	83.8
1953-54	2,300	84.5
1954-55 (estimate)	2,400 - 2,700	88.2 - 99.2

German Milling Quota Regulations and Internal Freight Subsidy for Imported Quality Wheat.- German government milling regulations require millers to use not less than 40 per cent of indigenous wheat and not more than 32 per cent of imported "hard quality" wheat ("Qualitaets-Hart-Weizen"). The balance of 28 per cent generally known as soft or "filling wheat" ("Füllweizen") may consist of either domestic or other foreign wheat. A subsidy towards the cost of inland freight from the port of arrival (which must be a German sea port) to his mill is paid to the miller by the government. The subsidy is differentiated by zones of distance from the sea port. Only Canadian "Manitobas 1, 2, 3 and 4", U.S. "Hard red winter Nos. 1, 2, 3 and 4", "Hard Red Spring Nos. 1, 2, 3 and 4" and Argentina wheats qualify for the designation "hard quality" and thus for the freight subsidy.

Amended Milling Quota Regulations.- An indication of the widespread fall in the milling quality of this year's wheat is the fact that the Bundestag approved on November 12 a recommendation of its agricultural committee that millers be allowed to use a lesser proportion of domestic wheat and a higher percentage of imported hard quality wheat. The new percentages are as follows:

Percentage of Domestic Wheat to be Milled

September-November 1954, inclusive	: 25 per cent
December 1954-January 1955, inclusive	: 30 per cent
February-May 1955, inclusive	: 20 per cent
June-July 1955, inclusive	: 30 per cent

Percentage of Imported Quality Wheat to be Milled

August—October 1954, inclusive:	not to exceed an average of 32 per cent during this period nor more than 40 per cent in any one month.
April—July 1955, inclusive:	not to exceed an average of 40 per cent during this period nor more than 45 per cent in any one month.

It is understood that the Ministry of Finance opposed this concession initially, since, because of the freight subsidy mentioned, it will add considerably to the Ministry's financial commitments. In the end, however, its consent was obtained.

Denmark The following information on Danish crops was provided by Mr. C. J. Small, Canada's Acting Agricultural Secretary at the Hague under date of November 1:

Official estimates suggest that the overall drop in Danish grain production this year will be 3 per cent compared with 1953. Most of the decline was in production of barley, rye and mixed grains. Wheat and oats production is expected to be only slightly below last year's.

<u>Grain</u>	<u>Production</u>			
	1953	1954	1953	1954
	- '000 Metric Tons-		- million bushels -	
Wheat	284	280	10.4	10.3
Rye	331	275	13.0	10.8
Barley	2,181	2,055	100.2	94.4
Oats	823	810	53.4	52.5

The Danish Statistical Department in making these estimates suggest that they should be considered with some reserve in view of the high moisture content of crops this year and the small sample on which they are based. The anticipated average high moisture contents of grain crops this year is expected to lower the value of the crop 10 per cent compared with 1953.

Average Moisture Contents in Grain Crops on Farms Equipped with Combines

Wheat	20.9 per cent
Rye	21.3 per cent
Barley	19.5 per cent
Oats	19.5 per cent
Mixed grains..	19.8 per cent
Total 1954 .	19.8 per cent
Total 1953 .	16.9 per cent

The Netherlands According to another report supplied by Mr. Small, despite abnormally wet growing and harvesting conditions, generally above-average grain crops have been harvested in the Netherlands. Interest in wheat in the past year increased at the expense of coarse grains, reflecting the relatively high guaranteed price for wheat in comparison with unsupported coarse grain prices which have been adversely affected by lower world prices. The area of wheat jumped from 65,000 hectares (161,000 acres) in 1953 to 110,000 hectares (272,000 acres) in 1954, and resulted in a crop provisionally estimated at 404,000 metric tons (14,844,000 bushels), or over 150,000 metric tons (5,512,000 bushels) more than in 1953. Barley, oats, rye and corn areas in total fell some 60,000 hectares (148,000 bushels) between the two years and this relationship to wheat will be about the same in 1955 or may even be accentuated. In view of this and given average weather conditions for seeding, growing and harvesting, the 1955 wheat crop should be again in the neighbourhood of 400,000 metric tons (14,697,000 bushels), necessitating between 600,000 and 700,000 metric tons (22.0 and 25.7 million bushels) of wheat imports.

Canadian exports to the Netherlands since the war have been largely composed of shipments of grain and certain industrial raw materials such as aluminum and metal ores. Dutch requirements of Canadian wheat for shipment in the 1954-55 crop year have been booked already and these amount to about 250,000 metric tons (9.2 million bushels). There is no question that Canadian hard wheat in Holland is rated above wheat from other sources on a quality basis, but 250,000 tons (9.2 million bushels) of Manitobas are officially regarded as sufficient to satisfy minimum needs to raise the quality of flour milled from imported soft wheats and domestic wheat (which by law must comprise 35 per cent of the grist this year). In the longer run annual purchases from Canada will likely continue above the 200,000 ton (7,349,000 bushels) mark as this amount is considered necessary for good quality flour production in Holland. In the policy field, wheat purchases will almost certainly be returned by the Government to private traders in August, 1955, but this development should make little difference to Canada's share of the Netherlands market.

Spain According to a recent press report Spain has set its guaranteed prices for grain farmers. The Government announces farmers will get the equivalent of \$2.81 (U.S.) per bushel for first class (hard) wheat, and \$1.92 (U.S.) per bushel for commercial grade rye. In addition, the Government will provide payments for farm storage to encourage orderly marketing. The sole marketing authority for bread-grain in Spain is the National Wheat Service.

Portugal Mr. L. More Cosgrave, Canadian Commercial Counsellor at Lisbon reports under date of November 18 that provisional crop forecasts of the National Statistical Institute place the 1954 wheat crop in Portugal at 705,000 tons (25.9 million bushels) compared with the 1953 crop of 658,000 tons (24.2 million bushels).

CALENDAR OF WHEAT EVENTS

- November 1 Plans for distribution of Selkirk wheat, which is resistant to race 15B of stem rust, were announced at a press conference held at the Cereal Breeding Laboratory in Winnipeg. The laboratory has control of 250,000 bushels of seed which will be offered to the public in lots of not less than two and not more than twelve bushels. In addition, an estimated 3,000,000 bushels will be available from the seed distributed to farmers in the spring of 1954.
- 5 Canada's 1954 wheat crop was officially estimated at 298.9 million bushels, the smallest crop since 1943 and less than half of either the 1953 or 1952 crops.
- The area seeded to winter wheat in the autumn of 1954 in Ontario, the major producing area for this crop in Canada, was tentatively estimated at 639,000 acres, a decrease of 10 per cent from the area seeded in 1953.
- 6 The Right Hon. C. D. Howe, Minister of Trade and Commerce, stated that the Government had authorized an interim payment of ten cents a bushel on 1953-54 deliveries of wheat, with the exception of certain special varieties that have not yet been sold in sufficient quantity to justify an interim payment. The interim payment will amount in total to about 38 million dollars.
- 9 Based on conditions at November 1, the average yield of wheat in England and Wales was forecast at 40.5 bushels per acre, compared with 44.8 bushels in 1953 and the five-year average of 41.6 bushels. Harvesting of wheat was practically completed in eastern and south-eastern districts but elsewhere there were areas where it was expected that some fields might have to be abandoned. Quality and condition of the crop are reported to be below average, and the moisture content high.
- 11 William E. Breckon of Burlington, Ontario, was declared world wheat champion at the Royal Agricultural Winter Fair at Toronto. The prize-winning entry was a sample of Genesee, a variety of winter wheat originally developed at Cornell University.
- 30 Broomhall states that wintry conditions in some sections of Europe delayed fall planting during the past week and reports continue to stress the probability that a number of countries will not be able to put in the full acreage planned. As a result, it is expected that a greater portion of the overall acreage for 1955 will be spring sown.
- According to Broomhall, an official report states that crop prospects in the Argentine are excellent and that the wheat outturn is expected to exceed 257 million bushels compared with 227.8 million last year.

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