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THE WHEAT REVIEW



APRIL, 1955

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THE WHEAT REVIEW

APRIL, 1955

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WORLD WHEAT SITUATION

Current Supplies Latest available estimates indicate that supplies of wheat remaining on or about April 1, 1955 in the four major exporting countries for export and for carryover at the end of their respective crop years amounted to 1,898.1 million bushels, about one per cent less than the 1,912.6 million available a year ago. Supplies at April 1, 1955 (in millions of bushels) were held as follows, with last year's figures in brackets: United States, 1,038.9 (964.9); Canada, 549.0 (666.4); Argentina, 157.4 (137.7); and Australia, 152.8 (143.6). 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 eight months (August—March) of the current Canadian crop year, at 517.5 million bushels, were some 25 per cent greater than the shipments of 414.8 million during the comparable period of 1953-54. Shipments from each of the four countries during the August—March period of 1954-55 and for the comparable period of the four preceding crop years are shown in the table below.

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

August—March	United States	Canada	Argentina	Australia	Total
- million bushels -					
1950-51	198.3	135.9	54.4	80.3	468.9
1951-52	333.4	200.1	23.9	62.8	620.2
1952-53	233.0	224.7	6.0	56.7	520.4
1953-54	125.7	170.9	78.0	40.2	414.8
1954-55	189.9	172.7	92.2	62.7	517.5

European Winter Wheat Outlook Favourable According to a report in the April 25 issue of 'Foreign Crops and Markets' fall-sown wheat came through the past winter in generally good condition over most of Europe. Reports to date indicate that winterkill was average or less despite extreme variations in temperature with alternate freezing and thawing in parts. Weather was unfavourable for spring work in a number of areas, and in mid-April, though spring seeding was becoming more active, it was still behind schedule in parts. Soil conditions were mostly satisfactory at latest report. Winter wheat acreage in Europe normally amounts to about 90 per cent of the total.

Increased acreage is reported in a number of the larger producing countries, but fall-sown acreage was sharply reduced in the United Kingdom, the Low Countries and parts of Scandinavia. It is still too early for a reliable indication of the extent to which these shortages can be made up by increased spring wheat acreage, but it seems unlikely that the total wheat acreage will be as large as in 1954 in those countries.

The acreage under winter wheat in France is one of the largest of recent years though not equal to a year ago. The condition of the winter crop is satisfactory and prospects indicate that an above-average production is probable.

Prospects in Italy are very favourable. Good weather favoured fall seeding, and total acreage is believed to be larger than in 1954. Weather conditions have been favourable to date and moisture supplies excellent in most areas. Increased use of fertilizer and selected seed also contributes to the favourable outlook.

Some decrease in winter wheat acreage is estimated for Western Germany, where heavy fall rains interfered with seeding. Condition of winter grains was mostly satisfactory at latest report, but spring seeding was very backward, running at times as much as three weeks behind normal.

Dry conditions hampered fall seeding operations in Spain but acreage under winter wheat appears to be as large as that of any recent year, despite that handicap. Light rains in December and heavy rains in January improved the outlook materially, and prospects were mostly satisfactory at latest report.

Weather conditions in the United Kingdom were distinctly unfavourable for fall seeding as a result of heavy rains and extensive flooding. Winter wheat acreage early in December was estimated to be only about half the acreage seeded at that time a year earlier.

Winter wheat acreage has amounted to 62 to 75 per cent of the total wheat acreage in recent years. This is a smaller percentage than in earlier years, reflecting increased mechanization, which permits more timely operations. It would appear unlikely, however, that the full arrears in seeding of winter wheat could be made up in increased spring seeding, especially since spring field work has been delayed by excessive moisture.

Condition in the Danube Basin countries are generally good. Fall seeding conditions in Yugoslavia and Hungary were better than those for Roumania and Bulgaria. In Yugoslavia, the acreage is reported to be slightly larger than for 1954. Following an exceptionally mild winter, conditions for spring work were reported favourable.

Fall seeding took place under generally favourable conditions in Hungary. Crops developed well but acreage of winter grains was slightly below that of 1954 partly because of a shortage of seed, according to reports. Farmers were urged to increase the acreage of spring grains to make good the arrears in fall sowing. Wet, cold weather, however, was making field work difficult in mid-March.

Seeding of wheat in Roumania in the fall of 1954 was delayed mainly because of the late corn harvest, on the basis of incomplete information. A mild winter, with more precipitation than in 1953 was reported. Spring work has been curtailed by heavy rains and late snow.

In Bulgaria also, fall seeding of wheat was delayed in certain areas because of dry weather. Spring work as well has been delayed by unfavourable weather conditions, principally late snows.

Wheat prospects are favourable in Greece, where weather conditions favoured fall seeding and development of the grain. Good rainfall has been reported for most areas, with flooding in some areas. Damage from flooding was not believed to have materially affected the over-all prospects for the country, at latest report.

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	2,549	-	-	1,021	3,570	5,616
Belgium	23,883	13,710	2	-	5,270	18,982	4,901
Bolivia	4,042	-	-	-	669	669	3,373
Brazil	13,228	-	-	-	7,350	7,350	5,878
Ceylon	10,288	-	5,205	-	-	5,205	5,083
Costa Rica	1,286	529	-	-	577	1,106	180
Cuba	7,422	1,977	-	-	4,877	6,854	568
Denmark	1,837	-	-	-	-	-	1,837
Dominican Republic	1,028	251	-	-	387	638	390
Ecuador	2,388	1,592	-	-	204	1,796	592
Egypt	14,697	-	-	376	212	588	14,109
El Salvador	735	221	-	-	430	651	84
Germany	55,116	17,640	5,152	-	21,437	44,229	10,887
Greece	12,860	-	-	-	11,988	11,988	872
Guatemala 4/	1,286	364	-	-	954	1,318	-
Haiti	1,837	225	-	-	1,160	1,385	452
Honduras Republic.	735	13	-	-	332	345	390
Iceland	404	18	-	-	30	48	356
India	36,744	2,187	16,919	-	5,315	24,421	12,323
Indonesia	6,246	-	3,511	-	367	3,878	2,368
Ireland	10,105	3,890	1,659	-	379	5,928	4,177
Israel 5/	8,267	1,849	-	-	6,156	8,005	-
Italy	3,674	-	-	-	-	-	3,674
Japan	36,744	16,837	-	-	18,646	35,483	1,261
Jordan	2,940	-	-	-	-	-	2,940
Korea	1,470	-	-	-	713	713	757
Lebanon	2,756	-	374	-	1,474	1,848	908
Liberia	73	6	-	-	29	35	38
Mexico	11,023	-	-	-	-	-	11,023
Netherlands	28,476	10,686	660	-	14,280	25,626	2,850
New Zealand	5,879	-	5,879	-	-	5,879	-
Nicaragua 4/	367	177	-	-	190	367	-
Norway 4/	8,451	2,875	-	-	4,880	7,755	696
Panama	845	217	-	-	296	513	332
Peru	7,349	-	-	-	729	729	6,620
Philippines 4/ ...	8,672	4,978	55	-	3,677	8,710	-
Portugal	7,349	262	379	-	2,196	2,837	4,512
Saudi Arabia	2,572	54	-	-	626	680	1,892
Spain	9,186	-	-	-	672	672	8,514
Switzerland	7,900	6,907	-	-	-	6,907	993
Union of S. Africa	13,228	5,600	-	-	2,053	7,653	5,575
Vatican City 4/...	551	-	-	-	559	559	-
Venezuela	6,247	3,097	-	-	2,545	5,642	605
Yugoslavia	3,674	3,620	-	-	13	3,633	41
Totals	393,046	102,331	39,795	376	122,693	265,195	
Guaranteed Quantities (Exporting Countries)		152,337	44,795	342	195,572	393,046	
Balance		50,006	5,000	(34)	72,879	127,851	

1/ Canadian sales through April 26, 1955.

2/ Sales recorded by International Wheat Council through April 22, 1955.

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

4/ Quota filled.

5/ Quota filled April 25, 1955.

CANADIAN SITUATION

Supply Position Estimated supplies of wheat in Canada for the 1954-55 crop year, consisting of the August 1 carryover of 582.7 million bushels, the 1954 crop of 298.9 million and August—February imports of 0.1 million amount to some 881.7 million bushels. The comparable 1953-54 total was 983.1 million bushels. With anticipated domestic requirements placed at 160.0 million bushels, some 721.7 million are available for export and for carryover during 1954-55, compared with 837.3 million available in 1953-54.

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	582.7
New crop	614.0	298.9
Imports of wheat, August—February	<u>3/</u>	0.1
Total estimated supplies	983.1	881.7
Less estimated domestic requirements for crop year.	145.8	160.0
Available for export and for carryover	837.3	721.7
Deduct:		
Overseas clearances of wheat as grain, Aug.—Mar..	136.3	143.4
Exports of Canadian wheat to U.S., Aug.—Mar.	4.2	2.3
Total exports of wheat	140.6	145.8
Exports of wheat flour in terms of wheat, Aug.—Mar.	30.4 <u>4/</u>	27.0
Total exports of wheat and wheat flour	170.9	172.7
Balance on April 1 for export and for carryover	666.4	549.0

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

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

Combined exports of wheat as grain and wheat flour in terms of grain equivalent during the August—March period of the current crop year amounted to 172.7 million bushels, surpassing by a slight margin the 170.9 million exported during the same period of the preceding crop year. The balance remaining on April 1, 1955 for export and for carryover was estimated at 549.0 million bushels, about 18 per cent below the April 1, 1954 total of 666.4 million.

Weekly marketings of wheat by farmers in Western Canada averaged 3.5 million bushels during the five-week period March 17 to April 20, as against an average of 2.8 million for the comparable period of the preceding crop year. With the amount of Canadian wheat entering domestic and export channels (over-seas clearances, domestic use and exports to the United States) exceeding deliveries during each of the first four weeks of the period under review, total visible supplies continued to decline slightly, decreasing from a level of 336.3 million bushels at March 16 to 329.8 million at April 13. However, largely due to substantially heavier marketings during the following week, the visible supply of wheat showed an increase for the first time since January 19, and stood at a level of 331.2 million bushels on April 20. Comparable totals at approximately the same date in 1954 and 1953 were 350.1 million and 270.9 million bushels, respectively.

Supplies in country elevators accounted for some 196.5 million bushels or 59 per cent of the total visible supply of Canadian wheat at April 20. Comparable supplies in 1954 were 192.5 million and in 1953, 138.6 million bushels. In Lakehead positions, stocks of wheat at April 20 this year amounted to 41.8 million bushels, as against 54.2 million a year ago and 19.8 million two years ago. Some 16.3 million bushels were in Bay, Lake and Upper St. Lawrence ports compared with 32.8 million in 1954 and 26.9 million in 1953. Supplies in Lower St. Lawrence and Maritime ports amounted to 19.0 million bushels, practically unchanged from the comparable 1954 total of 19.6 million but above the 1953 total of 16.2 million bushels. Some 10.3 million bushels were in forward western export positions (Vancouver-New Westminster, Victoria and Prince Rupert) at April 20, 1955 compared with 10.6 million and 6.6 million at approximately the same date in 1954 and 1953, respectively.

March Exports of
Wheat and Flour Total
20.7 Million Bushels

Export movement of both Canadian wheat as grain and wheat flour in terms of grain equivalent showed substantial increases during March, with the combined total of 20.7 million bushels being the heaviest since November 1954.

Comparable totals for the preceding month and the same month a year ago were 16.9 million and 18.2 million bushels, respectively, while the ten-year (1945-1954) average for March stood at 18.6 million bushels. Exports of wheat as grain during March 1955 amounted to 16.9 million bushels, exceeding by about 19 per cent the 14.2 million exported in both February, 1955 and March, 1954.

Preliminary Customs returns indicate that the equivalent of 3.8 million bushels of wheat were exported in the form of flour during March, surpassing by about 41 per cent the February total of 2.7 million bushels, but slightly below the adjusted March, 1954 total of 3.9 million bushels.

Cumulative exports of wheat as grain during the August-March period of the current crop year amounted to 145.8 million bushels, about 4 per cent above the comparable 1953-54 total of 140.6 million. Some 62.2 million bushels, representing 43 per cent of the total August-March exports of wheat as grain, were shipped to the United Kingdom. Other major markets for Canadian wheat as grain during the period, with quantities in millions of bushels, were as follows: Germany, 16.8; Japan, 14.8; Belgium, 10.2; Netherlands, 9.3; Switzerland, 6.8; Yugoslavia, 3.6; Norway, 2.6; Austria, 2.5; Ireland, 2.5; United States, 2.3 (of which 1.2 was for milling in bond); India, 2.2; Union of South Africa, 1.9; Israel, 1.8; Malta, 1.5; and Colombia, 1.3.

Cumulative exports of wheat flour for the first eight months of the 1954-55 crop year, based on preliminary Customs returns, were the equivalent of 27.0 million bushels of wheat. This total is about 11 per cent below the adjusted total of 30.4 million bushels exported during the same period of 1953-54. As with wheat as grain, the United Kingdom continued as the principal market for Canadian wheat flour, taking the equivalent of 8.8 million bushels, or 33 per cent of the total August 1954-March 1955 shipments. Other leading markets for Canadian wheat flour in terms of grain equivalent, with quantities in millions of bushels, were as follows: Philippine Islands, 4.3; Venezuela, 2.5; Trinidad and Tobago, 1.1; Jamaica, 1.0; Hong Kong, 0.7; Leeward and Windward Islands, 0.7; Japan, 0.7; Columbia, 0.6; and Cuba, 0.5.

1955 Season of
Navigation Opens

Navigation on the Great Lakes was declared officially open for the current season at 9.30 a.m. April 20, a few hours prior to the settlement of the grainhandlers' strike at the Lakehead.

The Board of Governors of the Winnipeg Grain Exchange declared the official opening on the same date a year ago. The earliest official opening on record was April 1, 1953 and 1902, while the latest official opening on record was May 22 in 1888. The first of the vessels to arrive at the Canadian Lakehead this year docked during the brief grain handlers' strike which started April 16. The first of these began loading on April 20 and more than half a dozen cleared with cargoes on April 21.

Rust Development

The following is the text of a report issued on April 20 by the Plant Pathology Laboratory at Winnipeg.

"Reports have just recently been received from Texas which describe the development of cereal rusts in that state and northern Mexico, as it appeared about the middle of April. It seems apparent that stem rust developed rapidly on both wheat and oats in southern Texas during the first half of April. This applies also to north-eastern Mexico, in the vicinity of Monterrey. Oat stem rust, in particular, is unusually prevalent and it is thought that a rapid build-up of this rust could occur if conditions become favourable.

One factor that will undoubtedly have a marked effect on future rust spread in northern Texas is the very severe freeze that occurred over the northern two-thirds of the state during the week ending March 26. The freeze, apparently, did not affect the southern part of the state where rust concentration is greatest. The immediate effect of this freeze was extensive killing of the leaves of small grains. Owing to this damage to the plants, leaf rust of wheat, which had been widespread over Texas, was severely checked but is still present over much of the state. The long-term effect of the freeze is less obvious but may actually be favourable to the spread of rust at a later date because the damaged plants will probably produce tillers with the results that a late crop will develop in the areas most severely affected by the frost. This late crop may become rusted at a time when fields farther north are in a state of rapid growth and liable to rust infection. Much of the Texas small grain crop was in urgent need of rain at the middle of April and conditions at that time were not very favourable for new rust infections. There was, however, an abundant supply of spores in the air and consequently rust spread could be rapid if needed rains should revive growth.

Continued on page 34.

Canadian Wheat Stocks at March 31, 1955 Total stocks of Canadian wheat at March 31, 1955 were estimated by the Dominion Bureau of Statistics at 621.5 million bushels, compared with 740.7 million on the same date in 1954 and the record 762.4 million in 1943. The ten-year (1945-1954) average was 384.5 million bushels. Data for these estimates were obtained from the Bureau's annual March 31 survey of grain held on farms, from returns by mill operators, and from information supplied by the Statistics Branch of the Board of Grain Commissioners for Canada relative to stocks of grain in commercial positions. An estimated 286.0 million bushels, representing about 46 per cent of the total were held on farms, some 96.6 million below the 1954 record of 382.6 million bushels. All but 8.5 million bushels of the total farm stocks were held on farms in the Prairie Provinces. Farm-held stocks in Saskatchewan were placed at 172.0 million, while those in Alberta and Manitoba were placed at 90.0 million and 15.5 million bushels, respectively. Of the 335.5 million held in off-farm positions, 199.6 million were in country elevators. Lakehead stocks amounted to 41.6 million bushels, compared with stocks of 54.6 million and 33.8 million in the same position in 1954 and 1953, respectively. Stocks in Eastern elevators at 32.6 million bushels were considerably below the comparable March-end stocks of 50.9 million in 1954, but slightly above the 1953 total of 30.0 million bushels.

Stocks of Canadian Wheat at March 31, 1953-1955 ^{1/}

Position	1953	1954	1955
- thousand bushels -			
<u>In Canada</u>			
On farms	329,050	382,660	286,050
Country elevators	144,638	197,235	199,585
Interior private and mill elevators	6,168	6,928	7,286
Interior terminal elevators	14,279	15,000	15,252
Vancouver-New Westminster elevators	6,184	10,880	8,243
Victoria elevator	148	239	622
Prince Rupert elevator	-	53	53
Churchill elevator	2,048	2,516	2,400
Fort William-Port Arthur elevators	33,849	54,557	41,582
Storage afloat (Lakehead)	-	195	-
In transit-rail (Western Division)	25,083	6,870	8,364
Eastern elevators	29,977	50,904	32,632
Storage afloat (Eastern Division)	-	8,066	12,796
In transit - lake (Eastern Division) ...	6,262	-	-
In transit - rail (Eastern Division) ...	3,914	1,352	3,206
Eastern mills (mill bins only)	2,343	2,248 ^{2/}	3,195
Western mills (mill bins only)	354	342 ^{2/}	229
Totals, in Canada	604,297	740,044	621,496
<u>In United States</u>	2,038	609	36
Totals, in Canada and United States .	606,335	740,653	621,531

^{1/} Stocks other than on farms and in mills compiled by the Statistics Branch, Board of Grain Commissioners for Canada, as at the close of business on April 1, 1953, March 31, 1954, and March 30, 1955.

^{2/} Revised.

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
	24	860,365	4,361,781	2,313,620	7,535,766	9,619,761
December	1	773,311	5,210,323	2,256,125	8,239,759	9,349,937
	8	1,380,370	5,868,390	2,307,724	9,556,484	7,965,526
	15	1,574,453	6,687,615	2,559,364	10,821,432	12,118,847
	22	1,522,339	6,409,341	2,758,608	10,690,288	25,522,144
	29	824,747	5,461,664	2,157,273	8,443,684	12,330,776
January	5, 1955 ..	370,216	3,024,518	2,278,727	5,673,461	4,991,217
	12	529,174	5,468,664	2,658,378	8,656,216	5,739,776
	19	314,184	3,404,426	1,627,356	5,345,966	3,836,495
	26	271,226	2,465,802	1,515,185	4,252,213	1,018,965
February	2	159,207	1,937,823	1,719,139	3,816,169	1,445,837
	9	169,027	1,449,337	1,471,323	3,089,687	4,685,908
	16	101,914	699,110	1,003,088	1,804,112	3,789,131
	23	156,888	1,303,298	1,345,904	2,806,090	3,030,791
March	2	87,991	570,404	867,771	1,526,166	3,163,733
	9	46,263	753,727	1,089,932	1,889,922	2,248,171
	16	78,870	1,853,056	1,901,461	3,833,387	2,589,608
	23	95,205	1,268,086	1,528,664	2,891,955	2,307,908
	30	94,360	1,015,894	1,077,220	2,187,474	2,872,732
April	6	207,920	2,149,357	1,217,394	3,574,671	2,504,338
	13	282,263	1,344,957	1,159,838	2,787,058	3,687,171
	20	521,176	3,536,998	2,012,682	6,070,856	2,512,488
Totals		15,158,098	98,007,383	54,324,655	167,490,136	275,085,257
Adjusted Totals** ...		15,227,802	99,140,107	53,122,227	167,490,136	

Average similar period:

1943-44-1952-53 ... 34,165,423 151,139,020 77,630,945 262,935,388

*Preliminary. **Details of adjustments not available by weeks.

Visible Supply of Canadian Wheat, April 20, 1955
Compared with Approximately the Same Date, 1953 and 1954

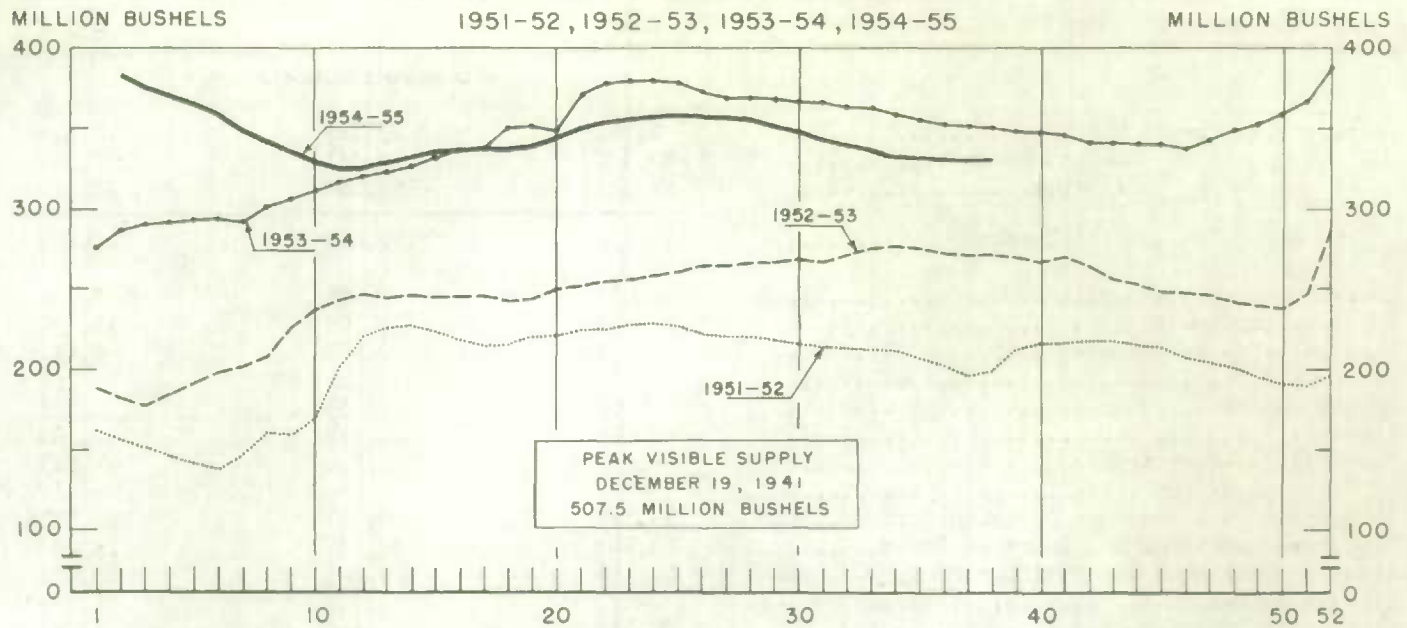
Position	1953	1954	1955
- thousand bushels -			
Country elevators - Manitoba	8,543	23,589	23,629
Saskatchewan	80,570	115,681	109,355
Alberta	49,521	53,188	63,510
Totals	138,634	192,458	196,494
Interior private and mill	6,455	7,289	7,064
Interior terminals	15,092	15,109	15,294
Vancouver-New Westminster	6,246	10,202	9,411
Victoria	50	331	789
Prince Rupert	309	53	53
Churchill	2,094	2,516	2,400
Fort William-Port Arthur	19,843	54,168	41,845
Storage Afloat	-	195	-
In transit rail (Western Division)	23,388	9,687	14,331
Bay, Lake and Upper St. Lawrence Ports	26,903	32,757	16,295
Lower St. Lawrence and Maritime Ports	16,155	19,643	18,951
Storage Afloat	-	3,555	1,586
In transit lake	9,026	668	3,789
In transit rail (Eastern Division)	5,307	519	2,858
United States ports	973	931	-
In transit U.S.A.	444	-	-
Totals	270,920	350,080	331,161

Grading of Wheat Inspected, August-March, 1954-55 with Comparisons

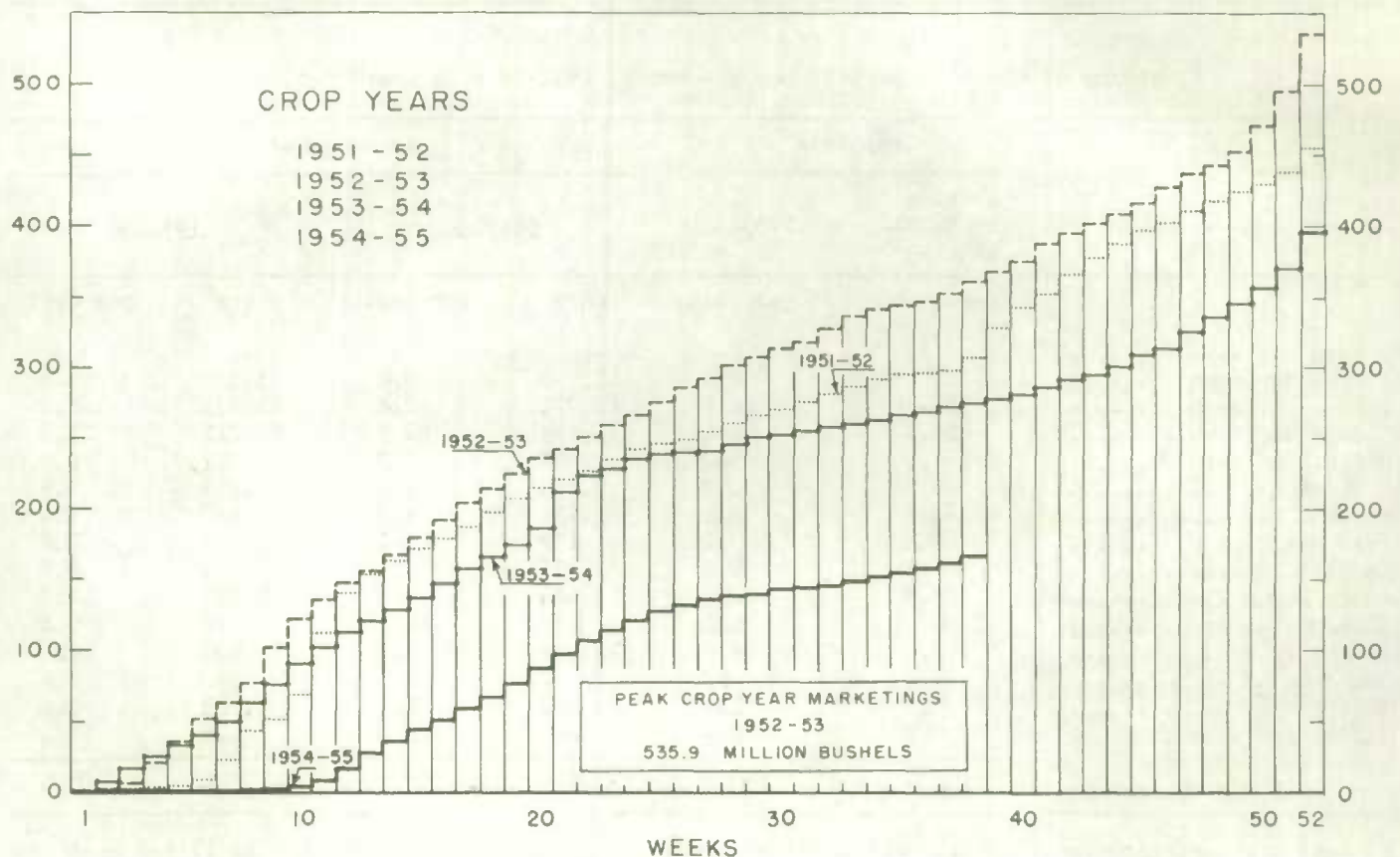
Grade	Crop Year		August-March			
	Average 1948-49- 1952-53	1953-54	1953-54		1954-55	
	per cent	per cent	cars	per cent	cars	per cent
1 Hard	1/	-	-	-	-	-
1 Man. Northern	12.1	8.0	11,758	9.0	5,559	5.5
2 Man. Northern	29.7	45.9	55,971	42.8	41,735	41.2
3 Man. Northern	13.9	20.4	26,759	20.5	24,211	23.9
4 Man. Northern	7.4	5.0	7,450	5.7	6,047	6.0
5 Wheat	7.7	4.8	7,853	6.0	2,935	2.9
6 Wheat	3.8	2.1	1,534	1.2	1,467	1.4
Feed Wheat	0.6	0.2	179	0.1	775	0.8
Garnet	0.9	0.5	635	0.5	1,263	1.2
Amber Durum	2.9	2.2	3,588	2.7	2,311	2.3
Alberta Winter	0.4	0.1	158	0.1	418	0.4
Toughs 2/ 3/	15.6	9.0	12,628	9.7	12,124	12.0
Damps 2/ 4/	3.6	1/	72	0.1	374	0.4
Rejected 2/	0.7	1.2	1,482	1.1	1,583	1.6
All Others	0.6	0.6	643	0.5	423	0.4
Totals	100.0	100.0	130,710	100.0	101,225	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)

Wheat Shipments* to the United States by Destination
August 1, 1954 to April 20, 1955
Compared with Approximately the Same Period 1952-53 and 1953-54

Destination	1952-53	1953-54	1954-55
- bushels -			
By Vessel			
Duluth-Superior	2,643,223	73,026	-
Milwaukee	-	15,940	-
Chicago	383,222	68,700	-
Huron	320,734	-	40,000
Erie	276,567	-	-
Buffalo	12,530,570	3,026,038	1,683,591
Oswego	1,642,791	-	-
Totals, Vessel	17,797,107	3,183,704	1,723,591
By Rail			
U.S.A. Seaboard Ports	633,765	16,534	35,822
Other U.S.A. Ports	3,986,256	1,659,919	648,337
Totals, Rail	4,620,021	1,676,453	684,159
Totals, Shipments	22,417,128	4,860,157	2,407,750

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

Total shipments of wheat to the United States, either for re-export or retention for domestic use, from the beginning of the current crop year to April 20, amounted to 2.4 million bushels. During the comparable periods of 1953-54 and 1952-53 shipments amounted to some 4.9 million and 22.4 million bushels, respectively. Of this season's total to date some 72 per cent has been shipped by vessel, almost all of which was unloaded at Buffalo.

Rail shipments of wheat to Maritime Ports from Bay, Lake and Upper St. Lawrence Ports during the first eight months of the current crop year totalled 27.0 million bushels, more than three times as great as the 8.9 million shipped during the comparable period of 1953-54.

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

Origin of Shipments	August 1, 1953 to March 31, 1954	August 1, 1954 to March 31, 1955
- bushels -		
Port McNicoll	3,469,474	7,412,487
Midland	3,494,417	10,012,830
Collingwood	797,448	1,872,709
Owen Sound	781,742	2,855,967
Goderich	240,278	682,594
Sarnia	-	3,782,365
Walkerville	145,082	348,776
Totals	8,928,441	26,967,728

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	81,253
December	1,387,828	464,914	347,824	179,272
January	5,839,567	6,550,958	510,486	352,109
February	3,618,007	9,566,151	368,662	318,009
March	1,564,586	6,285,944	555,518	245,958
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, March, 1955

Grade	Prince Edward Island	Nova Scotia	New Brunswick	Quebec	Ontario	Alberta
- bushels -						
2 Northern	-	1,200	-	-	-	-
4 Northern	-	-	-	-	4,500	-
5 Wheat	-	16,167	8,833	49,083	16,583	-
6 Wheat	-	-	-	-	1,500	-
Toughs	2,833	3,000	26,500	20,944	15,527	-
Rejected	-	-	-	4,375	7,182	-
Amber Durum	-	-	-	8,252	4,101	4,414
All Others	-	-	-	30,759	20,205	-
Totals	2,833	20,367	35,333	113,413	69,598	4,414

Overseas Exports of Canadian Grain by Ports of Loading, August 1, 1954 to April 20, 1955
with Comparisons

Ports	Wheat	Oats	Barley	Rye	Flaxseed
- bushels -					
Pacific Seaboard					
Vancouver-New Westminster	57,026,849	3,470,058	7,208,538	-	294,751
Victoria	1,051,120	-	-	-	-
Prince Rupert	314,795	-	4,436,177	-	-
Churchill	11,986,093	-	-	-	-
Lakehead Direct	-	-	158,337	-	-
St. Lawrence					
Montreal	30,261,041	396,495	17,056,397	1,230,942	1,126,064
Sorel	5,439,101	-	1,985,567	399,413	-
Three Rivers	6,787,063	-	454,000	-	-
Quebec	7,901,813	-	-	-	-
Maritime Ports					
Saint John	2,048,735	-	46,687	-	-
West Saint John	13,750,008	511,069	4,405,062	295,340	2,025,023
Halifax	13,521,217	-	1,239,743	-	906,620
U.S. Atlantic Seaboard ...	35,822	-	-	883,544	-
Totals	150,123,657	4,377,622	36,990,508	2,809,239	4,352,458
August 1, 1953 to April 21, 1954	144,339,295	3,064,762	41,744,733	416,318	4,003,207

Freight Assistance Shipments Claims filed for payment up to March 31, 1955 represent shipments of 8.2 million bushels of wheat from the Prairie Provinces to Eastern Canada and British Columbia under the freight assistance policy during the first seven months of the current crop year. This preliminary total subject to upward revision with the filing of additional claims has already exceeded the revised total of 7.6 million bushels moved under the policy during the same period of the 1953-54 crop year.

Provincial Distribution of Wheat Shipments under the Freight Assistance Policy
August—February, 1954-55 and 1953-54

Month	Nfld.	P.E.I.	N.S.	N.B.	Que.	Ont.	B.C.	Total
- thousand bushels -								
August, 1954	5	12	77	46	468	476	265	1,348
September	8	9	65	42	538	422	261	1,345
October	8	7	74	50	528	348	233	1,246
November	12	4	68	45	514	404	295	1,341
December	6	15	80	40	458	367	213	1,178
January, 1955	5	6	61	31	396	406	144	1,048
February	4	14	54	34	305	227	26	663
Totals <u>1/</u>	48	66	478	286	3,206	2,649	1,436	8,168
Same period 1953-54:								
Preliminary <u>2/</u>	54	74	411	253	2,675	2,573	1,283	7,324
Revised <u>1/</u>	59	75	417	254	2,688	2,619	1,480	7,593

Preliminary data on millfeed shipments under the freight assistance policy indicates the movement of 302,662 tons during the August—February period of the current crop year. As with freight-assisted shipments of wheat, this total is based on claims filed up to March 31, 1955 and may be subject to considerable upward revision with the filing of additional claims. The current preliminary figure for the first seven months of the crop year is, already, about 13 per cent above the revised total of 268,549 tons for the same months of 1953-54.

Provincial Distribution of Millfeed Shipments under the Freight Assistance Policy
August—February, 1954-55 and 1953-54

Province	1953-54		1954-55
	Preliminary <u>2/</u>	Revised <u>1/</u>	Preliminary <u>1/</u>
- tons -			
Newfoundland	2,171	2,371	1,880
Prince Edward Island	2,787	2,806	3,682
Nova Scotia	19,312	19,584	19,929
New Brunswick	17,190	17,260	17,153
Quebec	122,643	125,187	152,375
Ontario	68,720	72,091	83,131
British Columbia	24,907	29,250	24,512
Totals	257,730	268,549	302,662

1/ Based on claims filed up to March 31, 1955. 2/ Based on claims filed up to March 31, 1954.

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
November	20,160	331	3,495	23,985	30,146
December	16,201	131	3,586	19,918	23,807
January	14,792	335	2,814	17,940	17,381
February	14,102	96	2,700	16,899	14,818
March	16,719	173	3,817	20,709	22,585
Totals	143,430	2,342	26,968	172,739	173,352

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 for both wheat and wheat flour.

4/ Subject to revision.

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

Destination	December	March		August—March	
	Wheat Flour 1/2/	Wheat Flour 2/	Wheat 3/	Wheat Flour 2/	Wheat 3/
- bushels -					
<u>COMMONWEALTH COUNTRIES</u>					
United Kingdom	963,855	849,370	7,293,190	8,790,336	62,186,562
<u>Africa</u>					
British East Africa	-	-	-	2,075	-
Gambia	967	1,377	-	13,311	-
Gold Coast	8,622	7,232	-	367,128	-
Nigeria	22,518	6,111	-	223,155	-
Other British West Africa	6,422	-	-	21,105	-
Rhodesia	-	-	-	-	434,933
Sierra Leone	572	23,778	-	117,126	-
Union of South Africa	-	-	733,600	-	1,928,453
<u>Asia</u>					
Ceylon	-	199,895	-	318,812	-
Cyprus	-	-	53,178	-	184,800
Hong Kong	116,226	92,668	-	742,266	-
India	-	-	351,493	85	2,186,613
Malaya and Singapore	34,605	30,065	-	280,044	-
<u>Europe</u>					
Gibraltar	-	11,875	-	74,497	-
Malta	-	-	565,867	-	1,470,335
<u>North America</u>					
Bahamas	12,303	16,218	-	167,521	-
Barbados	20,520	25,668	-	241,754	833
Bermuda	10,656	8,820	-	74,043	-
British Honduras	3,366	2,115	-	15,678	-
Jamaica	155,340	78,934	1,200	965,637	6,867
Leeward and Windward Islands	58,999	101,624	-	700,466	-
Trinidad and Tobago	48,681	153,311	-	1,131,467	-
<u>Oceania</u>					
New Zealand	-	-	-	459	-
<u>South America</u>					
British Guiana	5,877	4,149	-	93,181	-
Totals, Commonwealth Countries ..	1,469,529	1,613,210	8,998,528	14,340,146	68,399,396
<u>FOREIGN COUNTRIES</u>					
<u>Africa</u>					
Azores and Madeira	-	1,593	-	38,498	-
Belgian Congo	64,192	75,429	-	451,314	-
Egypt	-	1,282	-	3,847	-
French Africa	-	-	-	3,487	-
Liberia	576	1,129	-	5,913	-
Libya	-	-	-	-	224,000
Morocco	-	3,784	-	25,713	-
Portuguese East Africa	-	1,768	-	1,768	151,386
Portuguese West Africa	4,694	918	-	37,399	-
<u>Asia</u>					
Arabia	117	1,728	-	2,547	115,361
Bahrain	-	-	26,638	-	44,836
Israel	-	-	-	-	1,849,306
Japan	129,699	13,851	2,132,629	658,931	14,820,329
Lebanon	20,574	756	-	86,755	-
Philippine Islands	449,401	879,606	-	4,308,327	-
Portuguese Asia	4,820	5,737	-	22,486	-
Syria	-	-	-	436	-
Taiwan	-	-	-	360	-
Thailand	24,678	29,214	-	185,909	-

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

Destination	December	March		August—March	
	Wheat Flour 1/2/	Wheat Flour 2/	Wheat 3/	Wheat Flour 2/	Wheat 3/
- bushels -					
FOREIGN COUNTRIES					
Europe					
Austria	-	-	74,667	-	2,548,841
Belgium	-	-	500,950	-	10,211,447
Denmark	-	-	-	680	-
Finland	-	-	-	-	328,067
France	-	-	-	2,020	-
Germany, Federal Republic	30,262	63,477	2,317,784	369,068	16,818,403
Greece	-	-	-	2,025	-
Iceland	2,871	3,740	-	20,304	-
Ireland	-	-	403,200	-	2,478,853
Italy	17,703	10,121	-	86,373	369,706
Netherlands	-	-	-	3,033	9,287,347
Norway	-	-	373,840	-	2,629,735
Portugal	1,719	572	-	17,658	-
Switzerland	-	-	1,499,680	-	6,785,444
Yugoslavia	-	1,377	-	9,639	3,620,007
North America					
American Virgin Islands	1,732	1,440	-	16,096	-
Costa Rica	62,757	49,860	43,333	335,093	76,667
Cuba	76,684	111,420	-	547,952	738,400
Dominican Republic	23,940	34,722	-	181,458	6,500
El Salvador	47,920	28,818	-	255,528	-
French West Indies,	1,120	571	-	4,486	-
Guatemala	34,857	44,253	-	304,601	-
Haiti	12,901	12,164	-	222,129	-
Honduras	-	-	-	459	-
Mexico	-	-	-	225	-
Netherlands Antilles	20,048	35,329	-	185,571	-
Nicaragua	49,248	44,685	-	223,659	-
Panama	14,261	29,209	-	191,173	-
St. Pierre and Miquelon	1,719	1,827	-	11,614	-
United States					
Flour in terms of wheat	56,844	91,854	-	393,413	-
For milling in bond 4/	-	-	-	-	1,209,153
For domestic use 4/	-	-	173,045	-	1,132,369
Oceania					
French Oceania	-	-	-	25,322	-
Guam	4,352	3,096	-	27,324	-
South America					
Chile	-	-	-	1,836	-
Colombia	75,722	59,297	150,798	595,643	1,282,799
Ecuador	-	-	197,215	5,161	637,215
Peru	963	28,265	-	70,776	-
Surinam	12,429	26,091	-	141,273	-
Venezuela	414,131	504,986	-	2,542,136	6,000
Totals, Foreign Countries .	1,662,934	2,203,969	7,893,779	12,627,418	77,372,171
Totals, All Countries	3,132,463	3,817,179	16,892,307	26,967,564	145,771,567

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				
	April 1	April 8	April 15	April 22	April 29
- cents and eighths per bushel -					
<u>Initial Payment to Producers</u>					
1 Northern	140	140	140	140	140
2 Northern*	136	136	136	136	136
3 Northern	134	134	134	134	134
4 Northern	126	126	126	126	126
5 Wheat	112	112	112	112	112
6 Wheat	106	106	106	106	106
Feed Wheat	100	100	100	100	100
1 C.W. Garnet*	124	124	124	124	124
2 C.W. Garnet*	119	119	119	119	119
1 Alberta Red Winter*	127	127	127	127	127
2 Alberta Winter*	122	122	122	122	122
1 C.W. Amber Durum	150	150	150	150	150
2 C.W. Amber Durum	147	147	147	147	147
3 C.W. Amber Durum	140	140	140	140	140
<u>International Wheat Agreement</u>					
<u>and Domestic Sales</u>					
1 Northern	176	176	176	176	176
2 Northern	173	173	173	173	173
3 Northern	171	171	171	171	171
4 Northern	166	166	166	166	166
5 Wheat	156	156	156	151/6	151
6 Wheat	154	154	154	149/6	149
Feed Wheat	151	151	151	146/6	146
1 C.W. Garnet	163	163	163	158/6	158
2 C.W. Garnet	161	161	161	156/6	156
3 C.W. Garnet	159	159	159	154/6	154
1 Alberta Red Winter	165	165	165	160/6	160
2 Alberta Winter	162	162	162	157/6	157
3 Alberta Winter	159	159	159	154/6	154
1 C.W. Amber Durum 1/	201/4	201/5	202/1	202/2	202/6
2 C.W. Amber Durum I/	201	201	201	201	201
3 C.W. Amber Durum I/	200	200	200	200	200
<u>Exports - Class II</u>					
1 Northern	176	176	176	176	176
2 Northern	173	173	173	173	173
3 Northern	171	171	171	171	171
4 Northern	166	166	166	166	166
5 Wheat	156	156	156	151/6	151
6 Wheat	154	154	154	149/6	149
Feed Wheat	151	151	151	146/6	146
1 C.W. Garnet	163	163	163	158/6	158
2 C.W. Garnet	161	161	161	156/6	156
3 C.W. Garnet	159	159	159	154/6	154
1 C.W. Amber Durum	272/5	273/4	275	275	275
2 C.W. Amber Durum	272	272/4	274	274	274
3 C.W. Amber Durum	271	271/4	273	273	273

*Correction: Initial payments in effect since August 1, 1954. 1/ Prices of Durums sold for domestic use are ten cents per bushel higher than indicated in the table.

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

Class and Grade	Week ending				
	April 1	April 8	April 15	April 22	April 29
- cents and eighths per bushel -					
<u>Initial Payment to Producers</u>					
1 Northern	140	140	140	140	140
2 Northern*	136	136	136	136	136
3 Northern	134	134	134	134	134
4 Northern	126	126	126	126	126
5 Wheat	112	112	112	112	112
6 Wheat	106	106	106	106	106
Feed Wheat	100	100	100	100	100
1 C.W. Garnet*	124	124	124	124	124
2 C.W. Garnet*	119	119	119	119	119
1 Alberta Red Winter*	127	127	127	127	127
2 Alberta Winter*	122	122	122	122	122
1 C.W. Amber Durum	150	150	150	150	150
2 C.W. Amber Durum	147	147	147	147	147
3 C.W. Amber Durum	140	140	140	140	140
<u>International Wheat Agreement</u> <u>and Domestic Sales</u>					
1 Northern	174	174/2	175	175	175/3
2 Northern	171	171/2	172	172	172/3
3 Northern	169	169/2	170	170	170/3
4 Northern	164	164/2	165	165	165/3
5 Wheat	155	155	155	150/6	150/3
6 Wheat	153	153	153	148/6	148/3
Feed Wheat	150	150	150	145/6	145/3
1 C.W. Garnet	159	159/2	160	157/6	157/6
2 C.W. Garnet	157	157/2	158	155/6	155/6
3 C.W. Garnet	155	155/2	156	153/6	153/6
1 Alberta Red Winter	163	163/2	164	159/6	159/6
2 Alberta Winter	160	160/2	161	156/6	156/6
3 Alberta Winter	157	157/2	158	153/6	153/6
<u>Export - Class II</u>					
1 Northern	174	174/2	175	175	175/3
2 Northern	171	171/2	172	172	172/3
3 Northern	169	169/2	170	170	170/3
4 Northern	164	164/2	165	165	165/3
5 Wheat	155	155	155	150/6	150/3
6 Wheat	153	153	153	148/6	148/3
Feed Wheat	150	150	150	145/6	145/3
1 C.W. Garnet	159	159/2	160	157/6	157/6
2 C.W. Garnet	157	157/2	158	155/6	155/6
3 C.W. Garnet	155	155/2	156	153/6	153/6
1 Alberta Red Winter	163	163/2	164	159/6	159/6
2 Alberta Winter	160	160/2	161	156/6	156/6
3 Alberta Winter	157	157/2	158	153/6	153/6

*Correction: Initial payments in effect since August 1, 1954.

CANADIAN FLOUR MILLING SITUATION

Production The production of wheat flour reported by Canadian mills for March, 1955 at 1,893,000 barrels was the heaviest since October, 1954 and also exceeded by a slight margin the March, 1954 output of 1,832,000 barrels. The ten-year (1945-1954) average production for the month of March was 2,039,000 barrels. Mills reporting operations during March, 1955 had a total rated capacity of 92,039 barrels per 24-hour day, and on the basis of a 27-day period, 76.2 per cent of this rated capacity was effective.

Wheat milled for flour during the month amounted to 8.5 million bushels as against 7.1 million during the preceding month and 8.1 million bushels milled during March, 1954. Of the wheat milled for flour during March, 1955, some 7.7 million bushels were Western Canadian Spring wheat (other than Durum) with most of the remainder consisting of Ontario Winter wheat (519,000 bushels) and Durum wheat (126,000 bushels).

Exports According to preliminary Customs returns, exports of Canadian wheat flour in March, 1955 totalled 848,000 barrels (3,817,000 bushels of wheat equivalent) an increase of 41 per cent over flour exports of the previous month. Flour shipments during the month of March went to fifty-three countries, with shipments of 880 thousand bushels to the Philippine Islands and 849 thousand to the United Kingdom, accounting for 23 per cent and 22 per cent, respectively, of the total exported. Other countries receiving shipments of one hundred thousand bushels or more were as follows, in thousands of bushels: Venezuela, (505); Ceylon, (200); Trinidad and Tobago, (153); Cuba, (111); and Leeward and Windward Islands, (102).

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
November	8,363,953	1,885,284	776,615
December	7,463,128	1,676,067	796,893
January	6,906,626	1,552,247	625,259
February	7,113,437	1,589,273	600,104
March	8,485,397	1,892,556	848,262
Totals	63,517,329	14,271,236	5,992,792
Same period 1953-54 (revised)	61,724,450	13,969,692	6,744,655

^{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 Total domestic supplies of wheat for the 1954-55 crop year, consisting of the July 1, 1954 carryover of 901.9 million bushels and the 1954 crop of 969.8 million, amount to 1,871.7 million bushels. Imports of wheat from Canada for all purposes during the first nine months of the current crop year amounted to 1.3 million bushels, compared with 2.9 million during the July-March period of 1953-54. Domestic disappearance of wheat for 1954-55 is now placed at 625 million bushels, including approximately 485 million for food, 75 million for feed and 65 million for seed. Preliminary estimates indicate that about 209.1 million bushels of wheat, wheat flour and products in terms of grain equivalent were exported in the first three-quarters of the current United States marketing year compared with 151.6 million in the same period a year earlier. After deducting exports for the period July 1, 1954 to March 31, 1955 and anticipated domestic requirements for the crop year, the balance remaining on April 1, 1955 for export and for carryover was estimated at 1,038.9 million bushels compared with 964.9 million on the same date a year ago.

United States Wheat Supplies

Item	1953-54	1954-55 <u>1/</u>
- million bushels -		
Carryover at beginning of crop year (July 1)	562.5	901.9
New crop	1,169.5	969.8
Total estimated domestic supplies	1,732.0	1,871.7
Imports of wheat for domestic use, July-March	2.9	1.3
Total estimated supplies <u>2/</u>	1,734.9	1,873.0
Less estimated domestic requirements for crop year <u>3/</u>	618.4	625.0 <u>4/</u>
Available for export and for carryover	1,116.5	1,248.0
Deduct:		
Exports of wheat as grain, July-March	127.3	177.2
Exports of wheat flour and products in terms of wheat, July-March	24.3	31.9
Total exports of wheat, wheat flour and products	151.6	209.1
Balance on April 1 for export and for carryover	964.9	1,038.9

1/ Preliminary. 2/ Excluding imports for April-June period.

3/ Includes allowances for shipments of United States wheat and wheat products to Alaska, Hawaii, Puerto Rico, Guam, Samoa, Virgin Islands and Wake Island. These shipments are not included in exports as set out in the table.

4/ Revised.

Exports for the entire 1954-55 marketing year are expected to total about 250 million bushels, as against 217 million bushels in 1953-54. This total, in addition to estimated domestic requirements would result in a total disappearance of about 875 million bushels, indicating a record carryover at July 1, 1955 of around one billion bushels.

April Winter The April 27 issue of the United States Department of Agriculture's
Wheat Crop publication 'The Wheat Situation' places the 1955 winter wheat crop
Estimate at 662 million bushels. This would be one-sixth smaller than the
1954 crop of 791 million bushels and nearly one-fourth less than
average. Declines from the prospective production as of December 1 in several of
the important Great Plains wheat states and in most southern States more than
offset improvement in most North Central States. This has resulted in a decline of
16 million bushels from the forecast on December 1. The April forecast is based
upon an appraisal of the April 1 condition of wheat as reported by individual
growers and upon soil moisture reserves and other factors affecting crop production.
The indicated yield at 15.2 bushels per seeded acre compares with 17.2 bushels in
1954 and 15.5 bushels in 1953. The 1944-53 average yield is 15.8 bushels per
seeded acre.

Total abandonment and diversion to uses other than grain is indicated at 9.0 million acres, 20.7 per cent of the total acreage seeded for all purposes last fall and winter. This is somewhat greater than the 17.3 per cent indicated last December. Of the 9.0 million-acre total, 7.6 million acres are in the 5-State area of Texas, Oklahoma, Kansas, Colorado, and New Mexico. For the U. S. last year, 7.4 million acres, or 16.2 per cent of the total acreage seeded, were lost or diverted.

In the important wheat States from Nebraska to Texas and westward, wheat prospects show a decline or no change from the December 1 forecast. Below normal precipitation and several dust storms resulted in lower production prospects in Oklahoma, Texas, New Mexico, and Wyoming. Over a considerable area in 5 States centering about the Oklahoma Panhandle, timely rainfall will be needed to carry remaining acreage to maturity. In the southern part of the western Great Plains and eastward to the Atlantic, freezing temperatures in late March resulted in considerable damage to wheat. In many parts of this area temperatures were a record low for late March and damage has been difficult to assess, since there has been no experience with similar conditions in the past. Undoubtedly, in the southern States east of the Mississippi River, there will be more wheat acreage diverted to uses other than grain than intended earlier.

From Missouri and Illinois eastward, winter losses have been light and even though advancement of growth on April 1 was less than usual, prospects are generally good to excellent. In this area, the crop was not far enough advanced for the late March cold weather to cause much damage.

In Kansas, considerable loss of acreage has occurred in the southwestern part of the State, where wheat has been plagued by severe drought, high winds, and the effects of low temperature in late March. In other areas of Kansas, prospects for the wheat crop appear fair generally, with eastern and north central counties quite good. In Oklahoma and Texas, dust storms and inadequate moisture in the western areas have resulted in heavy abandonment of acreage. In central and eastern Oklahoma and in the Texas Low Rolling Plains counties and wheat areas

in Texas further east, the crop is in fair to good condition.

Winter wheat prospects in Nebraska on April 1 were good, although down somewhat from last December. Moisture supplies have generally been adequate. Low temperatures in late March appear to have resulted in little injury. Some damage from high winds was reported in western counties. In Colorado, prospects for winter wheat are the poorest in years. Lack of fall and winter precipitation, and some periods of strong winds, have been unfavourable for the crop in south-eastern Colorado. In Montana, Washington, and Idaho, acreage losses are expected to be less than average. Production forecasts for these three States show no change from December 1.

Stocks of Wheat
in All Positions
April 1, 1955

On April 22 the United States Department of Agriculture reported that the stocks of over 1,212 million bushels of wheat stored in all positions on April 1, 1955 were the largest for that date in the comparable series beginning in 1935. This total is over 7 per cent larger than a year earlier, the previous record holdings for April 1. Current stocks are 253 million bushels less than the January 1, 1955 stocks.

Off-farm stocks of nearly 1,005 million bushels of wheat, one-fifth larger than a year earlier, are a record total for the date. Of this total, about nine-tenths was either owned by the Commodity Credit Corporation or was warehouse-stored wheat under Government commodity loans. Stocks of wheat on farms, at about 208 million bushels, were nearly a third less than the record total a year earlier and the smallest April 1 stocks since 1952. About three-fifths of the total wheat on farms was under Government commodity loan.

The off-farm wheat total includes 101 million bushels at merchant mills, 429 million bushels in interior mills, elevators and warehouses and 352 million bushels of commercial stocks at terminals. The Commodity Credit Corporation had nearly 123 million bushels of wheat, a record total, stored in bins under CCC control, aboard ships in the "mothball" fleet, and in transit to ports. Other Government owned wheat is included in the estimate for the position where stored.

U. S. Wheat Stocks by Positions, April 1, 1955, with Comparisons

Position	April 1, 1953	April 1, 1954	January 1, 1955	April 1, 1955
- thousand bushels -				
On farms 1/	269,523	296,598	315,689	207,920
Terminals 2/	217,258	298,934	374,369	351,913
Commodity Credit Corporation 3/	4,351	47,483	131,366	122,509
Merchant Mills 1/ 4/	101,691	104,778	126,382	101,468
Int. Mills, Elev. & Whses. 1/ 5/	247,706	380,137	518,051	428,636
Totals	840,529	1,127,930	1,465,857	1,212,446

1/ Estimates of the Crop Reporting Board. 2/ Commercial stocks reported by Grain Division, AMS, at 44 Terminal cities, 3/ Owned by CCC and stored in bins or other storages owned or controlled by CCC, also CCC-owned grain in transit to ports; other CCC-owned grain is included in the estimates by positions. 4/ Mills reporting to the Bureau of the Census, on millings and stocks of flour. 5/ All off-farm storages not otherwise designated for each grain.

Cash Wheat Prices on the Kansas City and Minneapolis Markets

No. 2 Hard Winter, Kansas City		No. 1 Northern Spring, Minneapolis	
Date	Price	Date	Price
	cents per bushel		cents per bushel
April 1, 1955	242 - 251	April 1, 1955	249 1/4 - 252 1/4
4	239 1/4 - 240	4	245 - 249
5	247 1/2 - 257 1/2	5	239 1/2 - 244 1/2
6	237 1/4 - 244 1/4	6	241 3/8 - 246 3/8
7	235 1/2 - 263 1/2	7	244 3/4 - 249 3/4
8	Good Friday	8	Good Friday
11		11	243 1/8 - 248 1/8
12	248 3/4 - 258 1/2	12	243 3/8 - 247 3/8
13	241 3/4	13	242 1/2 - 247 1/2
14	239 3/4 - 240 1/4	14	243 - 248
15	246 - 265 1/2	15	243 7/8 - 248 7/8
18	240 3/4 - 255	18	245 7/8 - 251 7/8
19	242 - 272 3/4	19	246 5/8 - 252 5/8
20	242 3/4 - 263 3/4	20	247 5/8 - 253 5/8
21	245 - 275	21	247 7/8 - 254 7/8
22	246 1/2 - 275 1/4	22	247 5/8 - 254 5/8
25	250	25	248 - 255
26	246 - 276 1/2	26	245 1/2 - 252 1/2
27	244 - 273 1/4	27	241 1/2 - 248 1/2
28	244 3/4 - 246 1/2	28	239 3/8 - 245 3/8
29	242 3/4	29	241 - 247

Chicago wheat Futures, High Points of Closing

Date	May	July	September	December
	- cents and eighths per bushel -			
April 1, 1955	211/7	195	196/3	199/2
4	211/5	196/1	197/5	200/4
5	208/4	194/2	195/6	199
6	208/1	194/7	196/2	199/2
7	209/5	195/5	196/6	200
8		Good	Friday	
11	209/3	194/5	196	199/2
12	208/4	193/2	194/5	197/6
13	209	193/3	194/5	198/1
14	208/4	192/5	194/4	197/6
15	208/1	192/7	194/2	197/6
18	211/1	194/5	195/7	199
19	211/2	194/6	196/2	199/2
20	212/3	196/3	197/7	200/7
21	213/3	196/7	197/7	200/7
22	213/6	196/5	197/7	200/6
25	213/4	196/1	196/7	199/6
26	211/2	195/2	196/2	199/1
27	210/3	195/7	197/1	200
28	209/6	195	196	199
29	211/3	195/5	196/6	199/5

ARGENTINE SITUATION

Supply Position Due to an upward revision of some 14.1 million bushels in the 1954 crop estimate, estimated supplies of wheat in the Argentine for the 1954-55 crop year now total 336.7 million bushels. This amount consists of the December 1, 1954 carryover of 60.3 million bushels and the 1954 crop currently placed at 276.4 million. The comparable 1953-54 total was 301.1 million bushels. With domestic requirements estimated at 132.3 million bushels, some 204.4 million are available for export and for carryover during 1954-55 as against 172.5 million available in 1953-54. Combined exports of wheat as grain and wheat flour in terms of grain equivalent during the December-March period of the current crop year amounted to 47.0 million bushels compared with 34.8 million during the same months of 1953-54. The balance remaining on April 1, 1955 for export and for carryover was estimated at 157.4 million bushels, 14 per cent above the April 1, 1954 total of 137.7 million bushels.

Argentine Wheat Supplies

Item	1953-54	1954-55 <u>1/</u>
- million bushels -		
Carryover at beginning of crop year (December 1)	73.3 <u>2/</u>	60.3 <u>2/</u>
New crop	227.8 <u>3/</u>	276.4 <u>3/</u>
Total estimated domestic supplies	301.1	336.7
Imports of wheat for domestic use	-	-
Total estimated supplies	301.1	336.7
Less estimated domestic requirements for crop year	128.6	132.3
Available for export and for carryover	172.5	204.4
Deduct:		
Exports of wheat as grain, December-March	34.3	46.6
Exports of wheatflour in terms of wheat, December-March	0.5	0.4
Total exports of wheat and wheat flour	34.8	47.0
Balance on April 1 for export and for carryover	137.7	157.4

1/ Preliminary. 2/ Includes allowances for farm stocks. 3/ Official estimate.

The following account of the Argentine situation has been extracted from a report from Mr. W. F. Hillhouse, Agricultural Secretary, Canadian Embassy, Buenos Aires, under date of April 15, 1955, 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 The weather during the past month has continued somewhat cooler than average, with rainfall of varying intensity over most of the cereal zone. The continuing wet weather in the corn zone is hindering the harvesting of this crop and raising the humidity of the grain above normally usable levels. However, the weather has been ideal for the preparation of land for the seeding of barley, oats, rye, wheat and flaxseed. Early-sown fields of the first three of these grains have been providing feed for some time. Growth of natural pastures and alfalfa has also been aided by the weather of the past two months and live-stock-feed conditions are exceptionally good in the entire pampa area.

Revised Official Grain Estimates In the recently published report for 1954 of the Argentine Central Bank, estimates of area sown and production of grains were printed which included several changes from earlier official estimates. The new estimates are tabled below and compared with the previous estimates and similar figures for 1953-54:

Area and Production of Argentine Grain Crops

Grain	Area Sown			Production		
	1953-54	1954-55		1953-54	1954-55	
	Central Bank Estimate	First Official Estimate	Central Bank Estimate	Central Bank Estimate	First Official Estimate	Central Bank Estimate
	- thousand acres -			- thousand bushels -		
Wheat	15,694	15,097	15,157	227,811	262,277	276,434
Flaxseed	1,938	1,853	1,883	16,141	18,507	18,507
Oats	3,705	3,540	3,595	64,277	60,672	58,895
Rye	6,040	6,355	6,378	23,904	41,663	40,140
Barley	2,679	2,952	2,960	41,042	55,381	56,383
Corn	8,205	-	7,549	174,793	-	-

1954-55 Wheat Crop After several months of little sales activity through commercial channels, I.N.G.E. in the middle of March began selling to exporters once more. Since that time approximately 140,000 tons (5,144,000 bushels) of bread wheat and 28,000 tons (1,029,000 bushels) of durum type have been sold. Shipments of wheat have continued at a high level reaching almost 390,000 tons (14,330,000 bushels) during March. During the month the Central Bank published a new estimate of production which at 7,523,300 metric tons (276,434,000 bushels) was only slightly different from the trade estimate of several months ago. In spite of heavy shipments, availabilities of wheat in ports are quite good and there has been relatively little delay in loading so far this year.

1954-55 Corn Crop No official estimate of production has yet been published for this year's corn crop and trade opinions differ considerably. Although the very late-sown fields appear to have benefited somewhat from the rains of the past two months, the general outlook is still poor and most estimates are 3 million tons (118.1 million bushels) or less. Picking has begun in Santa Fé,

Córdoba, Entre Rios and in parts of Northern Buenos Aires and as expected yields are generally below average. The continued wet weather is making it very difficult to pick mechanically and few labourers are yet available from the northern provinces. A bonus of 5 pesos per quintal (25 cents per bushel) has been offered for corn delivered in suitable condition before May 15 but most corn harvested to date has been too wet to meet the established standards. The damage caused by the drought this year was extremely patchy, hence it is very difficult to estimate production until a representative portion of the crop has actually been harvested. However, few people consider that Argentina will have more than a few hundred thousand tons of corn at most to export this year.

Rye, Barley and Oats Rye sales to a total of about 8,000 tons (315,000 bushels) have marked the only sales activity in these three grains during the past month. Shipments of rye and barley during March were somewhat higher than during the previous two months but shipments of all three so far this year are very much below last year's levels. Entries of these grains from the interior are increasing but, especially in the case of rye, do not yet seem to bear an appropriate relationship to the estimates of production.

Policy Bonus for Corn: In order to speed deliveries from this year's late and short corn crop, I.N.G.E. has announced that effective April 11 a bonus of 5 pesos per 100 kilos (25 cents per bushel), above the base price of 45 pesos (\$2.29 per bushel), will be paid for suitable corn delivered by May 15. It will be recalled that last year a delivery bonus of 1.50 pesos (7.6 cents per bushel) was in force until September 30.

Fee for Use of Grain Loaders: A fee of 3,600 pesos (\$720.) per annum is to be charged by I.N.G.E. for all entities other than certain cooperatives which use government-owned mobile grain loaders. The fee to be paid by agrarian cooperatives will be 1,200 pesos (\$240.).

Sales Wheat: In March I.N.G.E. indicated their interest in receiving offers for the export of wheat and sales during the month totalled 132,750 metric tons (4,878,000 bushels). These were mainly for payment in sterling and Western German agreement dollars at 300 pesos per ton (\$1.63 per bushel) f.o.b. Rosafé wheat and 315 pesos (\$1.71 per bushel) for Southern type. Some sales were for payment in Dutch agreement dollars at a premium of 4 per cent. During the first week of April 12,000 tons (441,000 bushels) were sold for the same currencies, the price increasing to 302 pesos (\$1.64) and 317 pesos (\$1.73) for Rosafé and Southern type, respectively, for payment in sterling and Western German agreement dollars and proportionately for Dutch agreement dollars.

As a result of a call for tenders 28,000 tons (1,029,000 bushels) of Taganrock wheat were sold in the second half of March, 23,000 tons (845,000 bushels) for payment in Italian agreement dollars at 525 pesos per tons (\$2.86 per bushel), f.o.b. and 5,000 tons (184,000 bushels) for payment in sterling and Western German agreement dollars.

Rye: Sales in the last four weeks totalled 8,000 tons (315,000 bushels). The price at the beginning of April for payment in sterling and German agreement dollars was 22.00 pesos per 100 kilos (\$1.12 per bushel) f.o.b. which compares with 24.30 pesos (\$1.23) paid one month earlier, and by the middle of April had fallen to 21.00 pesos (\$1.07) on the sale of 1,000 tons (39,000 bushels)

for payment in sterling. However sales since the beginning of the year only aggregate 15,000 tons (591,000 bushels).

Grain Shipments Wheat shipments were further accelerated during the month and at 386,876 metric tons (14,215,000 bushels), a record for recent years, comprised four-fifths of the month's total for all grains.

Italy received 102,287 tons (3,758,000 bushels) of wheat in March and as can be seen from the table below, thereby gained the lead over Brazil. Shipments to the latter country are falling short of the necessary tonnage if the total envisaged under the current contract is to be fulfilled. However, the month's shipments to Brazil at 67,963 tons (2,497,000 bushels) did show some improvement over the previous period and may be expected to increase once consumption of Brazilian wheat has been completed. Poland received 63,499 tons (2,333,000 bushels) of wheat in March.

Argentine Wheat Exports, First Four Months 1954-55 with Comparisons

December—March, 1954-55		December—March	
Destination	Quantity		Quantity
	'000 bu.		'000 bu.
Austria	636	1953-54	34,308
Belgium	1,562		
Brazil	9,754		
Chile	3,683		
Czechoslovakia	729	1952-53	5,955
Denmark	303		
Finland	231		
Germany	5,994		
Italy	10,204	1951-52	3,584
Japan	2,615		
Netherlands	1,527		
Paraguay	525		
Peru	1,069	1950-51	34,214
Poland	4,860		
Switzerland	774		
United Kingdom	2,124		
Totals	46,591	1949-50	39,763

Shipments of other grains in March totalled only 99,138 tons. Barley comprised 51,723 tons (2,376,000 bushels) with Germany receiving (41,767 tons (1,918,000 bushels). Rye shipments for the month totalled 23,999 tons (945,000 bushels) with 21,899 tons (862,000 bushels) going to Poland. Oats totalled 22,106 tons (1,433,000 bushels) principally to Finland 9,406 tons (610,000 bushels) and Germany 8,400 tons (545,000 bushels). Corn shipments for the month totalled only 1,310 tons (52,000 bushels).

AUSTRALIAN SITUATION

Supply Position Estimated supplies of wheat in Australia for the 1954-55 crop year amount to 260.2 million bushels, consisting of the December 1, 1954 carryover of 93.6 million and the new crop of 166.6 million. This amount exceeds by 26.2 million bushels the comparable 1953-54 supplies of 234.0 million. With anticipated domestic requirements currently placed at 71.4 million bushels, some 188.8 million are available for export and for carryover during 1954-55, compared with 161.8 million available in 1953-54. After deducting exports for the period December 1, 1954—March 26, 1955, the balance remaining on March 27, 1955 for export and for carryover was estimated at 152.8 million bushels, some 6 per cent above the comparable 1954 total of 143.6 million.

Australian Wheat Supplies

Item	1953-54	1954-55 <u>1/</u>
- million bushels -		
Carryover, including flour as wheat, at beginning of crop year (December 1)	36.0	93.6
New crop	198.0	166.6
Total estimated supplies	234.0	260.2
Less estimated domestic requirements for crop year ..	72.2	71.4 <u>2/</u>
Available for export and for carryover	161.8	188.8
Deduct:		
Exports of wheat as grain, December 1 to March 26 ..	8.8	23.2
Exports of wheat flour in terms of wheat December 1 to March 26	9.4	12.8
Total exports of wheat and wheat flour	18.2	36.0
Balance on March 27 for export and for carryover	143.6	152.8

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 April 13, 1955 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 \$2.1955 (Canadian), the quotation in effect on April 1, 1955.

Exports Total exports of Australian wheat and flour, in terms of wheat, in the 1954-55 season, up to March 26th, were (at 36 million bushels) about double the amount exported during the same period last season.

Wheat exports were 23.2 million bushels, compared with 8.8 million last year, and flour in terms of wheat were 12.8 million bushels, compared with 9.4 million bushels in 1953-54. Present prospects, however, indicate that, by the end of the season, there will be a carryover of 93 million bushels, or about the same as last year.

Credit for Wheat Sales The Australian Wheatgrowers' Federation, at their Annual Conference held in April, decided to ask the Federal Government to provide credit facilities to countries wanting to buy Australian primary products on a deferred payment plan. Delegates agreed that it would be better to sell wheat on a deferred payment basis rather than store it indefinitely and run the risk of losing large quantities of grain through deterioration.

Marketing of Low-Grade Wheat Delegates from all States except Victoria to the Annual Conference of the Australian Wheatgrowers' Federation, agreed that the low-grade wheat affected by rain at harvest should not be mixed with f.a.q. wheat, and they supported the principle of marketing low-grade wheat in a separate pool. It is estimated that there will be about 5 to 6 million bushels of this low-grade wheat, most of it (approximately 4 1/4 million bushels) from northern Victoria, of which about 3 million bushels will have to be exported.

Approximately 750,000 bushels of this wheat has been sold to New Zealand for stock feed, at a discount of sixpence (5.5 cents) per bushel, compared with the price being paid by New Zealand for f.a.q. wheat.

Having regard to the above sale, the Wheat Board approved of a uniform price to Australian consumers, millers, processors, produce traders, poultry and stock feeders at sixpence (5.5 cents) a bushel discount on f.a.q. prices. The first advance paid is one shilling (18 cents) a bushel less than the advance paid on f.a.q. wheat, but growers will receive the full proceeds from the sale of this wheat. The amount of this wheat from New South Wales was much smaller and was able to be used locally for stock feed.

Wheat Surplus in Queensland Queensland is usually just about self-supporting in wheat, but sometimes it is necessary to import supplies to meet local requirements. This season, the Queensland crop was over 15 million bushels, compared with 10.2 million bushels last season, and an average crop of about 7 million bushels. This has resulted in a surplus being held in Queensland, of which only about one-fifth has been sold. Due to inadequate storage facilities, losses of wheat have occurred as a result of monsoonal weather.

Higher Yields A notable feature of the post-war period is the higher yields of wheat per acre that have been obtained in all States, although this season's average of 15.9 bushels per acre is 1.4 bushels less than the average for the five years ended 1953-54. The pre-war average for the five seasons ended 1938-39 was 11.9 bushels per acre. The increase in the average yield per acre has been due to good seasons and better cultural practices.

Seasonal Conditions Generally speaking, all States report excellent seasonal conditions with prospects for the pastoral and agricultural areas extremely good. The exceptions are, the flood areas in New South Wales and Queensland, the far south west of Queensland, and Tasmania where no rain of any consequence has

fallen since the middle of November, 1954.

Heavy rains in the Kimberleys and the Northern Territory have broken drought conditions and supplied enough water to carry cattle through the coming season.

Wheat areas should be in good shape before seeding begins.

Protein
Content
of Wheat

The protein content of wheat in Australia varies considerably, ranging from as low as below 8 per cent to as high as 15.1 per cent. The reason given for this wide variation is the different soil types in the wheatgrowing areas and the varieties sown.

The Chairman of the Flour Mill Owners' Council told a wheat industry convention in Victoria that Australian wheat would soon be unwanted overseas, except at a discount, if its protein content was not raised. The Chairman said that pre-war, lower-grade wheat was acceptable to Asian countries, but they now required better wheat for better bread. Discussion was held on the need for an incentive in the form of a premium on high protein content wheat, the millers claiming that if a premium was paid on wheat with a protein content of 11.5 per cent, then dockage should be imposed on wheats below 9 per cent.

New South Wales millers paid a premium of 3s.8d. (62 cents) a bushel on 3 million bushels of wheat from this year's crop, for milling.

The senior geneticist of the Victorian Department of Agriculture said that the only improvement in protein quality could come from the breeding of entirely new series of varieties to meet the specific problems of each area.

Bushel wheat exhibited at a Queensland show in March ranged from 9 per cent to 15.1 per cent in protein content. Growers from the rich Darling Downs area were surprised at the analysis as they have long thought that their wheat had a high protein content, and that their rich soil needed no fertilising agents. Some change in growing methods will be necessary to raise the protein content of wheats grown in this area.

Exports of Australian Wheat and Wheat Flour in Terms of Wheat,
December 1 to March 26, 1954-55 and Corresponding Period 1953-54

	Wheat		Wheat Flour	
	1953-54	1954-55	1953-54	1954-55
	- thousand bushels -			
Aden and Aden I/T	-	3	238	630
Belgian Congo	-	-	1/	1
Borneo	-	-	-	2
British North Borneo	-	-	9	56
British West Indies	-	2	-	38
Brunei	-	-	4	9
Burma	4	-	215	262
Ceylon	4	8	2,775	2,782
Dutch New Guinea	-	-	1/	14
Egypt (a/c War Office)	-	-	249	16
Eire	299	1,001	-	-
French Somaliland	-	-	3	4
Germany	1,228	806	-	-
Hadhramaut	-	-	-	5

Exports of Australian Wheat and Wheat Flour in Terms of Wheat,
December 1 to March 26, 1954-55 and Corresponding Period 1953-54

	Wheat		Wheat Flour	
	1953-54	1954-55	1953-54	1954-55
- thousand bushels -				
Hong Kong	4	119	-	-
Hong Kong (General)	-	-	151	(109
Hong Kong (a/c War Office) .	-	-	-	(30
India	345	8,881	-	-
Indonesia	-	-	2,239	1,734
Italy	-	-	-	7
Japan	41	283	-	-
Korea	-	-	204	-
Kure (a/c War Office)	-	-	57	3
Lebanon	-	359	1	293
Libya	-	-	-	33
Malaya	101	250	-	-
Malaya (General)	-	-	1,731	(2,883
Malaya (a/c War Office)	-	-	-	(52
Malta	-	281	-	-
Mauritius	-	1	453	414
Netherlands	-	388	-	-
New Zealand	2,275	2,693	-	-
Nyasaland	-	-	10	21
Pacific Islands	5	11	315	818
Palestine	-	-	-	6
Persian Gulf	22	41	31	123
Philippines	-	-	4	25
Pondicherry	-	-	6	2
Port Said (a/c S/S)	-	-	14	18
Portuguese East Africa	111	137	2	1/
Portuguese India	53	27	49	39
Rhodesia	674	1,025	-	-
Roumania	-	283	-	-
Sarawak	-	-	35	74
Saudi Arabia	29	59	3	73
Seychelles	-	-	8	16
Siam	3	2	167	249
Sudan	-	-	-	298
Tahiti	-	-	51	61
Timor	-	-	10	7
Trans-Jordan	-	346	-	-
United Kingdom	3,585	6,198	324	1,393
Yemen	-	-	-	3
Yugoslavia	-	-	-	1/
Zanzibar	4	2	-	151
Royal Navy	12	4	7	6
Ships' Stores	-	-	36	41
Totals	8,799	23,210	9,400	12,800

1/ Less than 500 bushels.

FRENCH SITUATION

The following account of the current crop situation in France has been extracted from a report provided by Miss V. F. Wightman, Commercial Secretariat, Canadian Embassy, Paris, under date of April 20, 1955, 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 .00281 Canadian dollars, the rate in effect on April 1, 1955.

Growing Conditions The month of March, being unusually cold and dry, was unfavourable to grain crops, according to the monthly report of the Ministry of Agriculture. The growing season is two to three weeks late this year and while early April was somewhat warmer, rainfall has been very light. The principal problem has been reduced feed supplies and the delay in putting live stock out to pasture.

As a result of the unfavourable weather, spring sowings of all grains at 890,000 hectares (2,198,000 acres) are only around half the area on April 1 of the previous year. However, this is compensated by higher winter sowings, and the final combined figure is expected to be above 1954.

Wheat Despite the delay in sowing spring varieties, the wheat area of April 1 at 4,434,700 hectares (10,954,000 acres) is 60,000 (148,000 acres) ahead of the previous year. Certain fields showed yellowing from the frosts in March, but have recovered and the general condition is good.

The April 1 estimate of sowings by the Ministry of Agriculture is as follows:

April 1 Estimate of Area Seeded

Grain	April 1, 1953	April 1, 1954	April 1, 1955
- thousand acres -			
Wheat	9,999	10,806	10,954
Wheat and Rye	59	52	57
Rye	1,037	1,028	998
Barley	2,303	2,019	1,599
Oats	4,811	3,976	2,661
Mixed Grains	190	157	155
Totals	18,399	18,037	16,424

French Wheat Supplies

The following table gives the Frenchwheat position on commercial stocks of the 1954 crop held by the Grain Board as of March 1.

French Supplies of Soft Wheat at March 1, 1955
(Commercial Stocks Owned by Grain Board)

Item	Million Bushels
Commercial carryover, August 1, 1954	30.4
Farmers marketings August 1, 1954 - February 28, 1955	259.1
Total Commercial Supplies	289.4
Less domestic requirements for crop year	183.7
Available for export and carryover	105.7
Deduct exports of wheat and flour in wheat equivalent (August 1 - February 28)	57.9*
Balance March 1, 1955 for export and carryover	47.9

*Comprising 1,393,870 tons (51.2 million bushels) to foreign countries and 180,597 tons (6.6 million bushels) to French Union including exports of flour in wheat equivalent of 63,039 tons (2.3 million bushels).

Source: Private estimate based on Grain Board figures.

Principal Markets The following countries have been the principal markets for French wheat and flour during the period August 1, 1954 to February 28, 1955.

Principal Markets for Wheat and Flour, August 1, 1954 - February 28, 1955

Countries	Thousand Bushels	Countries	Thousand Bushels
Ceylon	1,160	Israel	763
Denmark	5,781	Poland	7,699
Finland	577	Roumania	2,725
Germany	5,540	Switzerland	1,694
Hungary	9,593	United Kingdom	8,481

Source: Private calculation based on Grain Board figures.

Monthly Exports The following figures show the steady rate of wheat and flour exports during the 1954-55 crop year to date.

Wheat and Flour Exports, August 1, 1954 - February 28, 1955

Month	Foreign Countries	French Union	Total
- thousand bushels -			
August, 1954	2,171	1,078	3,249
September	3,108	1,066	4,174
October	4,882	1,152	6,034
November	5,163	978	6,142
December	8,095	921	9,016
January, 1955	15,194	739	15,933
February	12,603	701	13,304
Totals	51,216	6,636	57,852

Greatly Increased Farmers marketings of slightly over 7 million metric tons
Availabilities (257.2 million bushels) are 100,000 tons (3,674,000 bushels)
above March 1 last year and have well passed total
marketings of 6 million metric tons (220.5 million bushels from the 1953 crop.
It is reported that export contracts cover 1.7 million tons (62.5 million
bushels) of which 300,000 (11,023,000 bushels) are in the form of flour.

It is expected that 7.5 million metric tons (275.6 million bushels) will be delivered to the Board from the 1954 crop. All wheat must be sold to the Board by May 15 in order to benefit from the carrying charges allowed for wheat stored on the farm, and the Board has promised to take measures to assure that elevator capacity is available. With the large increase in French wheat production over the past two years, elevator capacity has been tight and trade and farm organizations have asked the government to assist in a building program; under the terms of the National Equipment Program State aid for the current year is 900 million francs (\$2.7 million approximately).

Market Activity The French market has recently registered small but steady sales to Germany under the terms of the Franco-German government agreement for 500,000 tons (18,372,000 bushels) of wheat; prices have been \$71 f.o.b. Strasbourg and \$72.50 c.i.f. Bremen. The United Kingdom has made purchases of milling grades 76-77 kilos per hectolitre (60.8 to 61.6 pounds per bushel) at 2,291 francs per quintal (\$1.75 per bushel) c.i.f. British east coast port and 2,073 francs per quintal (\$1.59 per bushel) for feed wheats. Denmark has bought milling grades 77-78 kilos per hectolitre (61.6 to 62.4 pounds per bushel) at 2,225 francs per quintal (\$1.70 per bushel).

Rust Development The warm weather that has prevailed over the Canadian prairie
Continued from region in the first half of April gives promise that seeding
page 6 may not be unduly late as was feared at the time of the
issuing of the preceding report (March 29). However, in view of the more than usually abundant rust spore supply in southern Texas it is still considered advisable to seed as much rust resistant wheat, oats, and barley as possible this spring, particularly in Manitoba and south-eastern Saskatchewan."

CALENDAR OF WHEAT EVENTS

- April 8 The Bureau of the Census, United States Department of Commerce, estimates wheat flour production in the United States in February, 1955 at 17,714,000 sacks, an average of 886,000 sacks per working day, compared with working-day averages of 912,000 sacks during January, 1955 and 868,000 sacks in February, 1954.
- 11 According to a report published by the Crop Reporting Board of the United States Department of Agriculture, the winter wheat crop for harvest in 1955 is forecast at 662.3 million bushels, some 16 per cent smaller than the 1954 crop of 790.7 million bushels and 24 per cent below the ten-year 1944-1953 average of 867.4 million.
- 15 Total stocks of Canadian wheat in all North American positions as at March 31, 1955 were estimated by the Dominion Bureau of Statistics at 621.5 million bushels, compared with 740.7 million on the same date last year and the record of 762.4 million in 1943.
- 19 Payments to date under the Prairie Farm Assistance Act on the 1954 crop have reached a record level according to a statement made to members of the House of Commons by Robert McCubbin, Parliamentary Assistant to Agriculture Minister Gardiner. A total of over 23 million dollars has been paid to 100,000 farmers.
- 20 Navigation on the great Lakes was declared officially open for the current season. This was the same date as last season.
- Following settlement of a wage dispute, 1,200 Lakehead grain handlers returned to work, ending a five-day strike. According to press reports only one day's loading was lost because inclement weather would have held up operations in any event.
- 22 According to a report published by the Agricultural Marketing Service, United States Department of Agriculture, wheat stocks in all positions on April 1, 1955 at 1,212 million bushels were the largest for that date in the comparable series beginning in 1935. Off-farm stocks of nearly 1,005 million bushels were the largest on record for April 1, while farm stocks of 208 million bushels were the smallest April 1 stocks since 1952.

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