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Department of Trade and Commerce

THE
WHEAT REVIEW

NOVEMBER, 1957

Published by
Authority of the Honourable Gordon Churchill
Minister of Trade and Commerce

Prepared in the Crops Section, Agriculture Division
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WORLD WHEAT SITUATION

Current Supplies Latest available estimates indicate that supplies of wheat remaining on or about November 1 in the four major exporting countries for export and for carryover at the end of their respective crop years amounted to 2,107.2 million bushels, some 10 per cent below the 2,342.0 million available a year ago. Supplies at November 1, 1957 (in millions of bushels) were held as follows, with last year's figures in brackets: United States, 1,114.2 (1,290.8); Canada 864.0 (904.6); Argentina, 79.9 (50.6); and Australia, 49.1 (96.0). Estimates for both years include on farm stocks as well as those in commercial positions. It will be noted that, of the four countries mentioned, only Argentina has more wheat available than was the case a year ago.

Exports Total exports of wheat and flour in terms of wheat from the four major exporting countries for the first quarter (August-October) of the current Canadian crop year, at 211.7 million bushels were about 20 per cent below total shipments of 265.0 million during the comparable quarter of 1956-57. All four countries shared in the decline but the percentage decrease in Canadian shipments was less than for any of the other three countries concerned. Canada's share of the total shipments from the four countries during August-October, 1957 amounted to 34.2 per cent compared with 30.6 per cent of the total for the comparable quarter of 1956. Shipments from each of the four countries during August-October of the current and seven preceding crop years are shown in the table below.

Exports of Wheat and Flour in Terms of Wheat, August-October, 1957 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	53.8	73.8	33.7	21.5	182.8
1955	54.4	59.8	30.2	23.2	167.6
1956 <u>1/</u>	118.8	81.1	24.2	40.9	265.0
1957 <u>2/</u>	92.8	72.5	21.5	24.9	211.7

1/ Revised. 2/ Preliminary.

Notes on Crops A record wheat crop is forecast for Uruguay. The harvest now in progress is unofficially estimated as high as 36.7 million bushels, which would be about 80 per cent above the small 1956 production. If this Crop forecast is realized, a record surplus will be available for export from Uruguay. About half the expected production, or some 18 million bushels, would be considered surplus for export.

Wheat production in Sweden is now estimated at 27.2 million bushels, compared with earlier estimates of 32.0 million and the 1956 outturn of 35.0 million bushels. Wheat of milling quality from the 1957 harvest will not cover domestic requirements and will be supplemented by reduction of stocks and by imports. Sweden is therefore expected to be on a net import basis this season.

International Wheat Agreement Sales and Purchases for Crop Year 1957-58

Importing Countries	Guaranteed Quantities	S O U R C E						Total Purchases	Remainder 3/
		Canada	Argentina	Australia	France	Sweden	U.S.A.		
		1/	2/	2/	2/	2/	2/		
- thousand bushels -									
Austria	3,674	-	-	-	-	-	-	-	3,674
Belgium	16,535	543	-	2	-	-	608	1,153	15,382
Bolivia	4,042	-	-	-	-	-	-	-	4,042
Brazil	7,349	-	-	-	-	-	-	-	7,349
Costa Rica	1,470	202	-	-	-	-	394	596	874
Cuba	8,084	253	-	-	-	-	3,723	3,976	4,108
Denmark	1,837	116	-	-	-	-	799	915	922
Dominican Republic	1,286	218	-	-	-	-	259	477	809
Ecuador	1,837	212	-	-	-	-	155	367	1,470
Egypt	11,023	-	-	-	-	-	-	-	11,023
El Salvador	919	36	-	-	-	-	225	261	658
Germany	55,116	13,207	-	-	-	-	10,705	23,912	31,204
Greece	11,023	-	-	-	-	-	-	-	11,023
Guatemala	1,470	115	-	-	-	-	619	734	736
Haiti	2,204	198	-	-	-	-	593	791	1,413
Honduras Republic	919	26	-	-	-	-	77	103	816
Iceland	73	-	-	-	-	-	3	3	70
India	7,349	-	-	-	-	-	7,151	7,151	198
Indonesia	5,144	-	-	1,368	-	-	-	1,368	3,776
Ireland	5,512	650	-	331	-	-	-	981	4,531
Israel	8,267	-	-	-	-	-	1,680	1,680	6,587
Italy	3,674	-	-	-	-	-	-	-	3,674
Japan	36,744	6,227	-	2,285	-	-	10,636	19,148	17,596
Korea	2,205	-	-	-	-	-	-	-	2,205
Lebanon	2,756	-	-	-	-	-	-	-	2,756
Liberia	73	1	-	-	-	-	8	9	64
Mexico	3,674	-	-	-	-	-	-	-	3,674
Netherlands	25,721	5,953	-	24	-	-	3,595	9,572	16,149
New Zealand	5,879	-	-	3,394	-	-	-	3,394	2,485
Nicaragua	367	56	-	-	-	-	171	227	140
Norway	6,614	2,970	-	-	808	-	396	4,174	2,440
Panama	1,102	85	-	-	-	-	308	393	709
Peru	7,349	-	-	-	-	-	553	553	6,796
Philippines 4/ ...	6,063	2,271	-	464	-	-	3,245	5,980	-
Portugal	5,879	41	-	8	1,051	-	365	1,465	4,414
Saudi Arabia	3,674	-	-	-	-	-	18	18	3,656
Spain	4,593	-	-	-	-	-	-	-	4,593
Switzerland	6,981	1,120	-	-	-	-	336	1,456	5,525
Union of S. Africa	5,512	-	-	-	-	-	-	-	5,512
Vatican City	551	-	-	-	-	-	355	355	196
Venezuela	6,246	776	-	-	-	-	1,924	2,700	3,546
Yugoslavia	3,674	-	-	-	-	-	-	-	3,674
Totals	294,464	35,276	-	7,876	1,859	-	48,901	93,912	
Guaranteed Quantities (Exporting Countries)		100,027	14,287	29,414	16,072	6,251	128,413	294,464	
Balance		64,751	14,287	21,538	14,213	6,251	79,512	200,552	

1/ Canadian Sales through November 26, 1957.

2/ Sales recorded by International Wheat Council through November 22, 1957.

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

4/ Quota filled.

CANADIAN SITUATION

Prairie Grain Advance This act, providing for the payment of cash advances on western wheat, oats and barley was proclaimed on November 25. Necessary documents have gone out to elevator agents and western producers may obtain advances, subject to the provisions of the legislation.

Payments Act

Proclaimed

Supply Position Total estimated supplies of Canadian wheat for the 1957-58 crop year, consisting of the August 1, 1957 carryover of 723.0 million bushels and the new crop of 373.5 million amount to some 1,096.5 million bushels, representing a decline of 5 per cent from the 1956-57 record supplies of 1,152.7 million. After deducting an estimated 160.0 million bushels for anticipated domestic requirements, some 936.5 million are available for export and for carryover during 1957-58 compared with 985.7 million in 1956-57.

Combined Exports of wheat as grain and wheat flour in terms of grain equivalent during the August-October period of the current crop year amounted to 72.5 million bushels, 11 per cent below the 81.1 million exported during the same months of the preceding crop year. The balance remaining on November 1, 1957 for export and for carryover amounted to 864.0 million bushels, about 4 per cent below the November 1, 1956 total of 904.6 million.

Canadian Wheat Supplies

Item	1956-57 <u>1/</u>	1957-58 <u>2/</u>
- million bushels -		
Carryover in North America at beginning of crop year (August 1)	579.6	723.0
New Crop	573.1	373.5
Imports of wheat and Wheat flour in terms of wheat, August-September	<u>3/</u>	-
Total estimated supplies	1,152.7	1,096.5
Less estimated domestic requirements for crop year ...	167.0	160.0
Available for export and for carryover	985.7	936.5
Deduct:		
Overseas clearances of wheat as grain, August-October	71.3	62.2
Exports of Canadian wheat to U.S., August-October ..	0.6	1.6
Total exports of wheat	71.9	63.8
Exports of wheat flour in terms of wheat, August-October	9.2 <u>4/</u>	8.7
Total exports of wheat and wheat flour	81.1	72.5
Balance on November 1 for export and for carryover ...	904.6	864.0

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.

Marketings of wheat by farmers in the three Prairie Provinces up to November 20 of the current crop year amounted to some 69.6 million bushels. During the five-week period, October 17 to November 20, deliveries of wheat totalled 26.3 million bushels, while the volume entering Canadian export and domestic channels (Overseas clearances, plus Canadian domestic use, including grain milled for subsequent export, plus imports into the United States) amounted to 38.1 million bushels. As a result, the visible supply of Canadian wheat declined steadily during the period under review, from a level of 382.2 million bushels at the week ending October 16 to 370.3 million at the week ending November 20. The current crop year total at November 20 represents a relatively slight increase over the comparable 1956 and 1955 totals of 352.1 million and 365.9 million bushels, respectively.

The volume of wheat held in country elevators at November 20 this year, at 208.8 million bushels, accounted for 56 per cent of the total visible supply but was slightly below both the 1956 comparable total of 218.7 million and the 1955 figure of 215.2 million. Some 12.5 million bushels were "In transit rail" (Western Division), exceeding by considerable margins both the 1956 and 1955 totals of 9.6 million and 6.6 million bushels, respectively. Lakehead stocks amounted to 41.6 million bushels, above the total of 34.4 million in this position a year ago but virtually unchanged from the 41.7 million of two years ago. Some 184,000 bushels appear as "Storage Afloat" at Fort William-Port Arthur compared with none last year and 177,000 bushels in 1955. Stocks amounting to 39.7 million bushels in Bay, Lake and Upper St. Lawrence Ports were considerably greater than the 27.5 million in 1956 but slightly below the 1955 figure of 40.0 million bushels. Some 10.2 million bushels were "In transit lake" at November 20 this year, as against 5.5 million in this position at approximately the same date in 1956 and 7.4 million in 1955. Supplies in Lower St. Lawrence and Maritime Ports, amounted to 24.1 million bushels compared with 22.0 million a year ago and 22.9 million two years ago. In West Coast ports (Vancouver-New Westminster, Victoria, Prince Rupert) supplies of wheat at November 20 amounted to 9.2 million bushels exceeding both the 1956 and 1955 comparable totals of 8.2 million and 6.0 million bushels, respectively.

October 1957 Exports of
Wheat and Flour total
21.4 Million Bushels

Total exports of Canadian wheat and wheat flour in terms of grain equivalent during October 1957 amounted to 21.4 million bushels, 11 per cent below both the September 1957 total of 23.9 million and the October 1956 figure of 24.0 million and 6 per cent lower than the ten-year (1946-1955) average exports for the month of 22.7 million bushels. Exports of wheat as grain, during October at 17.9 million bushels, were 15 per cent below the 21.2 million exported during the preceding month and 14 per cent less than the October 1956 total of 20.9 million bushels. Preliminary Customs returns indicate that the equivalent of 3.5 million bushels of wheat was exported in the form of flour during October 1957 compared with 2.7 million exported during September and the adjusted October 1956 figure of 3.1 million bushels.

Cumulative exports of wheat as grain during the August-October period of the current crop year amounted to 63.8 million bushels, 11 per cent below the corresponding 1956 total of 71.9 million. The United Kingdom, Canada's leading purchaser of wheat as grain received shipments amounting to 26.3 million bushels, representing 41 per cent of the three-month total. During the August-October period of the 1956-57 crop year shipments of wheat to the United Kingdom amounted to 25.6 million and accounted for 36 per cent of the total. Other principal markets for Canadian wheat as grain during the first three months of the current crop year, with figures for the corresponding period of the preceding crop year in brackets, were as follows, in millions of bushels: Japan, 10.4 (12.5); Federal Republic of Germany, 10.2 (15.1); Netherlands, 7.6 (3.4); Belgium, 2.9

(4.2); United States, 1.6 (0.6); and Norway, 1.4 (1.9).

Cumulative exports of wheat flour during the first three months of the 1957-58 crop year, based on preliminary Customs returns were the equivalent of 8.7 million bushels of wheat, 6 per cent lower than the adjusted August-October 1956 total of 9.2 million. As with wheat as grain, the United Kingdom was also the major market for Canadian wheat flour. Shipments of wheat flour to that country during the period under review amounted to the equivalent of 3.1 million bushels and accounted for 36 per cent of the three month total. During the August-October period of 1956 shipments of wheat flour to the United Kingdom amounted to the equivalent of 3.0 million bushels and represented 32 per cent of the total. Other leading markets for Canadian wheat flour in terms of grain equivalent, with revised data for the August-October period of the preceding crop year in brackets, were as follows, in thousands of bushels: Philippine Islands, 1,505 (1,235); Venezuela, 687 (941); Trinidad and Tobago, 428 (411); Jamaica, 394 (401); United States, 392 (377); Leeward and Windward Islands, 244 (179); Japan, 237 (300).

General Quota

Position

By December 2, 1957 out of a total of 2,070 shipping points in the Western Division, the Canadian Wheat Board had placed 423 points on a quota of 2 bushels per specified acre and 1,121 points on a 1-bushel quota. Of the remainder, 496 points were on the Initial Unit Quota while 30 stations were reported as "closed".

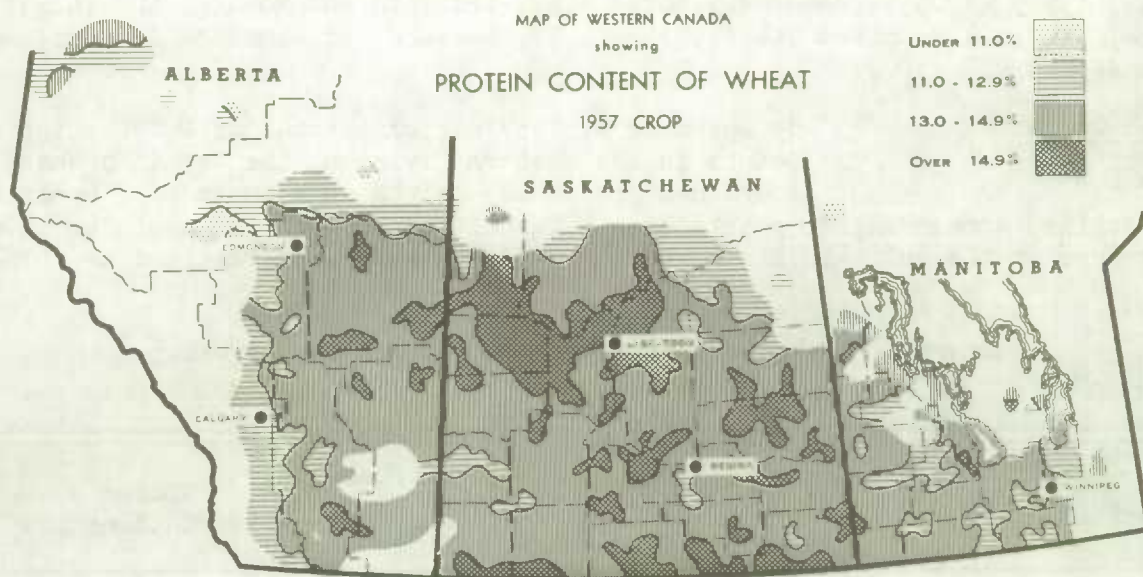
Summary of Elevator Shipping Points in Each Quota Group
as at December 2, 1957

Province	Initial Unit Quota	General Quota in Bushels per Specified Acre		Closed Stations	Total
		One	Two		
Ontario	-	-	1	1	2
Manitoba	119	201	54	1	375
Saskatchewan	225	579	288	9	1,101
Alberta	152	339	78	19	588
British Columbia ..	-	2	2	-	4
All Provinces ...	496	1,121	423	30	2,070

Protein Survey of
Western Canada's 1957
Hard Red Spring Wheat

According to Crop Bulletin No. 66 "Protein Survey of Wheat, 1957" published by the Board of Grain Commissioners for Canada, the average protein content of the 1957 crop of hard red spring wheat is 14.0 per cent. This figure is 1.6 per cent higher than the corresponding figure of 12.4 per cent for the 1956 crop. The results are based on the analysis of 7,256 samples of grades No. 1 to No. 4 Northern and No. 4 Special and the Garnet grades, collected from 1,745 shipping points in the Prairie Provinces.

The map below shows the areas of high, medium, below-average, and low protein content of hard red spring wheat for 1957. It was prepared by plotting the mean protein data (based on one to eleven 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 therefore presents a general rather than a detailed picture of the geographic distribution of wheat of different protein levels.



Map of Western Canada showing the protein content of hard red spring wheat, 1957 crop.

The 1957 map shows that medium-protein areas (13.0 to 14.9%) cover most of the three Prairie Provinces. High-protein areas (over 14.9%) are mostly in Saskatchewan, with crop districts 6B, 7B, 8B, and 9B mainly in this range. Smaller high-protein areas are scattered throughout the remainder of Saskatchewan and in the northern half of Alberta. In southern Alberta there is only one small high-protein area, i.e., east of Lethbridge. In Manitoba three very small high-protein areas are shown. Below-average areas (11.0% to 12.9%) are shown in western and northern areas of Alberta, in the Peace River District, and in northeastern Saskatchewan. Manitoba has medium sized below-average protein areas scattered throughout the province.

Protein Contents of Grades of Hard Red Spring Wheat,
1957 Values for Each Province and 1957 and 1956 Values for Western Canada

Grade	1957 Crop			Western Canada	
	Manitoba	Saskatchewan	Alberta	1957	1956
	- per cent -				
No. 1 Northern	-	14.1	13.4	14.0	13.0
No. 2 Northern	12.7	14.2	13.6	14.0	12.5
No. 3 Northern	13.5	14.5	13.6	14.0	12.3
No. 4 Northern	13.8	14.4	13.4	13.9	12.3
No. 4 Special	15.1	15.5	17.8	15.6	-
No. 3 C.W. Garnet	-	-	14.3	14.3	-
Weighted Mean	13.5	14.3	13.5	14.0	12.4

Quality of 1957
Western Canadian
Wheat

The following information relative to the quality of this year's wheat crop in the Prairie Provinces is taken in part from a press release issued on November 9, 1957 by the Grain Research Laboratory, Board of Grain Commissioners for Canada, summarizing Crop Bulletin No. 65 "Canadian Wheat, 1957". Adjustments have been made to bring the release in line with both the November estimate of production and the final protein survey.

A wheat crop of excellent milling and baking quality was produced in Western Canada this year, according to a report issued by the Board of Grain Commissioners' Laboratory.

The protein content of the 1957 crop, estimated at 14.0 per cent is 1.6 per cent higher than the 1956 figure and 0.5 per cent higher than the long-term average. The Northern grades mill very satisfactorily and give high yields of flour of good colour and low ash. Baking strength is high, carrying power is very good, and doughs handle very well. Baking absorption and gassing power are both at satisfactory levels. The new crop represents a return to the exceptionally strong wheats which Canada harvested continuously during the dry periods of the late thirties and early forties.

Percentages of the crop entering each of the top grades are expected to be about as follows: 3 per cent of No. 1 Northern, 20 per cent of No. 2 Northern, 35 per cent of No. 3 Northern, 30 per cent of No. 4 Northern, and 12 per cent of lower grades. Production is estimated at 352 million bushels (of which 44 million is durum wheat) as compared with 551 million in 1956 and a 10-year average of 462 million. Because of the large amount of wheat in store in Canada, it will be some months before the influence of the new crop begins to show in export shipments.

Average bushel weights for 1957 wheat cleaned for milling, are 64.8, 63.2, 62.0, and 61.0 lb. for Nos. 1, 2, 3, and 4 Northern. Results of baking and physical dough tests show that all four grades have excellent baking quality, but the two top grades are superior in over-all strength. There is little to choose between the Northern grades in carrying power for weaker wheats though Nos. 1 and No. 2 Northern show some superiority.

Flour yield is closely similar for the four grades with ash increasing slightly as grade goes down; there is also a corresponding decrease in flour colour which reflects the higher percentage of damaged kernels in lower grades. Gassing power is considerably higher for No. 4 Northern than for the other three grades. No. 5 wheat makes a fairly good looking loaf but the crumb is dark in colour. Baking absorption is quite high and the dough handles reasonably well.

Despite a 56 per cent increase in the seeded acreage, the 1957 crop of durum wheat is only 5 million bushels larger than in 1956; production is estimated at 44 million bushels. There was a carryover of 24 million bushels of durum wheat at the beginning of the crop year.

As the poorer quality varieties, Pelissier and Golden Ball, have been largely replaced by the good variety Stewart in Alberta and Saskatchewan, and as Ramsay, a new rust-resistant variety, occupied much of the Manitoba acreage, No. 3 C.W. is expected to be the largest durum grade this year.

The durum crop will be higher in protein than for several years and bushel weight a trifle lower. Since the top three grades contain only high quality varieties the colour of the macaroni produced by these wheats will again be excellent; pigment levels are similar to those of last year's grades, and lipoxidase activity in each of these grades is also very low. Extra 4 C.W. is expected to be somewhat better in colour this year, and No. 4 C.W. will probably be similar to last year's grade.

Crop Bulletin No. 65, CANADIAN WHEAT 1957, contains comprehensive quality data for different sets of samples of both spring and durum wheat and discusses the qualities of the different grades.

Farmers' Marketings Deliveries of wheat by farmers in the three Prairie Provinces during the period August 1 to November 20 of the current crop year have amounted to 69.6 million bushels some 26 per cent below the total of 94.0 million marketed during the corresponding period of 1956 and sharply reduced from the ten-year (1946-1955) average marketings for the period of 164.5 million bushels. In addition to wheat, deliveries of the other principal Canadian grains, oats, barley, rye and flaxseed have also been lower than last year's levels. Marketings of these grains up to November 20, 1957 with figures for the corresponding period of 1956 in brackets, were as follows, in millions of bushels: oats, 23.1 (28.4); barley, 37.4 (45.8); rye 1.4 (2.2); and flaxseed, 8.6 (13.4).

Farmers' Marketings of Wheat in the Prairie Provinces, 1957-58

Week Ending		Manitoba	Saskatchewan	Alberta	Total	Last Year
- bushels -						
August	7, 1957 .	57,134	319,056	79,312	455,502	86,149
	14	51,489	1,073,769	506,259	1,631,517	827,064
	21	436,403	1,848,980	747,223	3,032,606	1,884,249
	28	497,229	3,705,358	1,247,539	5,450,126	3,949,527
September	4	334,501	3,237,345	876,295	4,448,141	3,182,696
	11	269,013	2,143,978	842,281	3,255,272	3,739,721
	18	573,078	2,315,055	900,777	3,788,910	5,760,514
	25	510,534	2,787,644	844,213	4,142,391	7,588,949
October	2	574,874	3,262,986	1,410,979	5,248,839	8,757,469
	9	499,194	4,127,394	1,537,209	6,163,797	7,157,121
	16	527,574	4,037,854	1,146,248	5,711,676	8,628,989
	23	697,465	3,168,778	1,045,896	4,912,139	6,845,753
	30	596,318	3,780,689	896,001	5,273,008	9,885,464
November	6	626,142	3,031,519	1,106,214	4,763,875	9,372,931
	13	627,457	3,567,995	1,470,042	5,665,494	7,900,996
	20	727,275	3,345,325	1,591,939	5,664,539	8,452,536
Totals		7,605,680	45,753,725	16,248,427	69,607,832	94,020,128
Average similar period						
1946-47--1955-56 ..		23,312,044	95,112,643	46,045,125	164,469,812	

Visible Supply of Canadian Wheat, November 20, 1957
Compared with Approximately the Same Date, 1955 and 1956

Position	1955	1956	1957
- thousand bushels -			
Country elevators - Manitoba	24,006	22,253	25,966
Saskatchewan	116,068	121,583	117,326
Alberta	75,125	74,888	65,503
Totals	215,200	218,724	208,796
Interior private and mill	5,757	6,888	5,609
Interior terminals	15,563	13,311	11,770
Vancouver-New Westminster	5,595	7,829	9,046
Victoria	393	319	170
Prince Rupert	37	37	-
Churchill	3,312	4,801	4,605
Fort William-Port Arthur	41,653	34,374	41,619
Storage Afloat	177	-	184
In transit rail (Western Division)	6,574	9,605	12,518
Bay, Lake and Upper St. Lawrence Ports ...	39,975	27,495	39,691
Lower St. Lawrence and Maritime Ports	22,927	21,999	24,140
In transit lake	7,416	5,451	10,228
In transit rail (Eastern Division)	1,240	1,105	1,716
United States ports	120	51	237
In transit U.S.A.	-	81	-
Totals	365,938	352,070	370,330

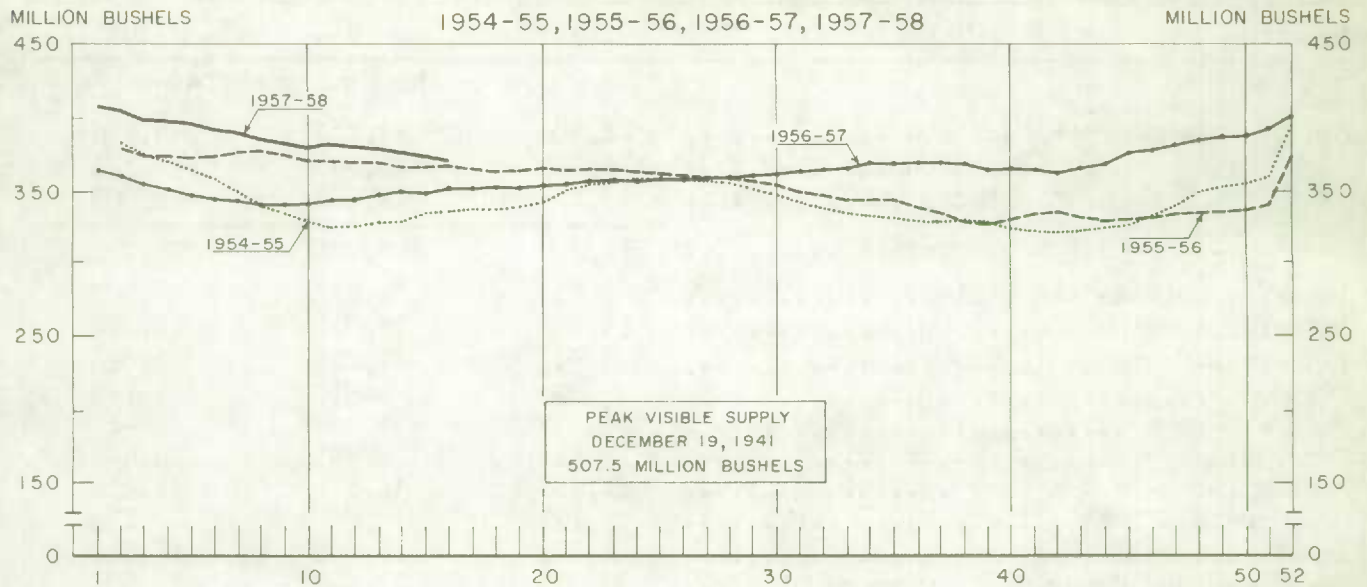
Grading of Wheat Inspected, August-October, 1957 with Comparisons

Grade	Crop Year		August-October			
	Average					
	1951-52- 1955-56	1956-57	1956	1957		
	per cent	per cent	cars	per cent	cars	per cent
1 Hard	1/	-	-	-	-	-
1 Man. Northern	4.6	1.2	1,152	2.1	235	0.5
2 Man. Northern	30.7	26.9	22,516	41.0	11,283	25.5
3 Man. Northern	20.5	27.1	11,711	21.3	11,950	27.0
4 Man. Northern	8.5	13.0	3,873	7.0	6,568	14.9
5 Wheat	8.1	14.6	6,873	12.5	6,877	15.6
6 Wheat	3.2	4.2	1,158	2.1	3,403	7.7
Feed Wheat	0.6	0.2	109	0.2	94	0.2
Garnet	0.5	0.1	94	0.2	1	1/
Amber Durum	2.2	5.5	2,782	5.1	1,962	4.4
Alberta Winter	0.3	0.6	764	1.4	17	1/
Toughs 2/ 3/	15.9	3.2	1,242	2.2	933	2.1
Damps 2/ 4/	2.7	1/	1	1/	1	1/
Rejected 2/	1.8	2.8	2,368	4.3	739	1.7
All others	0.5	0.5	311	0.6	138	0.3
Totals	100.0	100.0	54,954	100.0	44,201	100.0

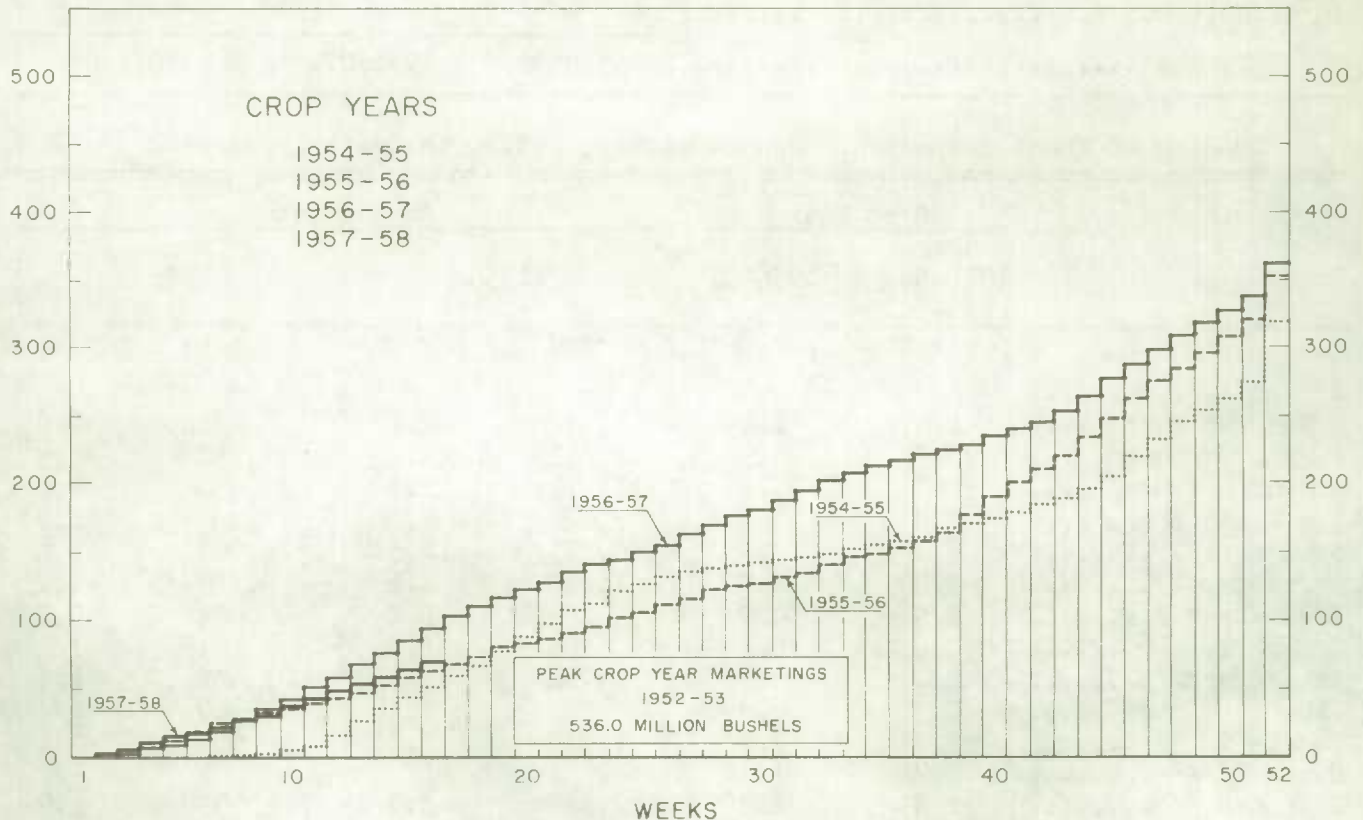
1/ Less than .05 per cent. 2/ All varieties and grades.

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 Fort William-Port Arthur, from the Opening of Navigation to November 20, 1957 and to Approximately the Same Date, 1947 to 1956*

Year	Wheat	Oats	Barley	Rye	Flaxseed	Total
- thousand bushels -						
1947	141,378	40,660	25,014	8,867	1,350	217,269
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	117,941	21,852	23,775	4,247	3,378	171,193
1951	170,709	51,408	41,718	6,560	1,896	272,291
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
1955	119,045	29,610	60,104	10,105	8,865	227,730
1956	179,241	40,583	81,464	10,174	9,558	321,020
1957	134,292	41,831	50,001	4,147	10,620	240,891

* Shipments from opening of navigation to November 21, 1947; November 18, 1948; November 17, 1949; November 23, 1950; November 22, 1951; November 20, 1952; November 19, 1953; November 17, 1954; November 23, 1955; and November 21, 1956.

Wheat Shipments* to the United States by Destination August 1-November 20, 1957
Compared with Approximately the Same Period 1955 and 1956

Destination	1955	1956	1957
- bushels -			
<u>By Vessel</u>			
Duluth Superior	451,315	472,095	803,427
Milwaukee	52,923	-	-
Chicago	234,616	89,487	156,933
Buffalo	428,356	174,800	1,210,576
Totals, Vessel	1,167,210	736,382	2,170,936
<u>By Rail</u>			
U.S.A. Seaboard Ports	-	-	-
Other U.S.A. Points	203,863	142,786	280,367
Totals, Rail	203,863	142,786	280,367
Totals, Shipments	1,371,073	879,168	2,451,303

* 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 October 31, 1956	August 1 October 31, 1957
- bushels -		
Port McNicoll	1,520,833	-
Midland, Tiffin	2,695,791	506,745
Collingwood	64,481	-
Owen Sound	450,779	-
Goderich	555,121	-
Prescott	1,112	-
Totals	5,288,117	506,745

Rail Shipments of Wheat from Fort William-Port Arthur, 1954-55-1957-58

Month	1954-55	1955-56	1956-57	1957-58
- bushels -				
August	61,070	56,951	100,667	33,297
September	50,633	64,033	70,324	42,125
October	46,053	63,975	120,535	34,937
November	81,253	148,576	240,628	
December	179,272	477,622	613,482	
January	352,109	2,340,921	792,000	
February	318,009	1,735,097	490,778	
March	245,958	1,599,503	338,534	
April	169,137	300,913	161,103	
May	68,878	91,534	73,212	
June	43,600	91,162	23,281	
July	57,619	102,560	31,432	
Totals	1,673,591	7,072,847	3,055,976	

Distribution of Rail Shipments of Wheat from Fort William-Port Arthur, October 1957

Grade	N.S.	Quebec	Ontario
- bushels -			
3 Northern	-	-	2,000
5 Wheat	1,583	1,500	10,334
Amber Durum	-	4,000	10,000
Others	-	3,000	2,520
Totals	1,583	8,500	24,854

Overseas Exports of Canadian Grain by Ports of Loading, August 1 - November 20, 1957, with Comparisons

Ports	Wheat	Oats	Barley	Rye	Flaxseed
- bushels -					
<u>Pacific Seaboard</u>					
Vancouver-New Westminster	36,518,165	309,454	4,507,348	-	1,006,959
Victoria	1,061,424	-	-	-	140,746
Prince Rupert	-	-	1,579,947	-	-
<u>Churchill</u>	16,577,206	56,750	-	-	-
<u>St. Lawrence</u>					
Montreal	17,392,457	805,202	777,452	19,991	2,422,360
Sorel	3,171,796	-	179,900	-	246,272
Three Rivers	2,527,064	-	-	-	-
Quebec	1,168,622	-	-	-	-
<u>Maritime</u>					
Halifax	78,400	-	-	-	-
Totals	78,495,134	1,171,406	7,044,647	19,991	3,816,337
August 1 - November 21, 1956	85,862,129	185,326	22,016,267	130,012	3,941,434

Overseas Clearances - Canadian Rapeseed August 1-November 20, 1957

Canadian Pacific Seaboard	pounds
Canadian Atlantic Seaboard	40,371,630
	32,651,332
Total, Rapeseed	73,022,962

Freight Claims filed for payment up to October 31, 1957 represent the movement of some 2,876 thousand bushels of wheat from the Prairie Provinces to Eastern Canada and British Columbia under the freight assistance policy during the August-September period of the 1957-58 crop year. During the same months of the 1956-57 crop year claims had been filed for a total of 3,397 thousand bushels, indicating on the assumption of approximately the same rate of submission of claims during both the current and preceding crop years that the August-September shipments of wheat under the policy were running about 15 per cent below those of 1956-57. Revised data on the 1956 August-September shipments of wheat based on claims submitted up to October 31, 1957 place the two-month total at 4,148 thousand bushels. The bulk of the shipments during the current two-month period under review went to destinations in Ontario and Quebec.

Provincial Distribution of Wheat Shipments under the Freight Assistance Policy
August-September, 1957 and 1956

Month	Nfld.	P.E.I.	N.S.	N.B.	Que.	Ont.	B.C.	Total
- thousand bushels -								
August, 1957	7	20	104	44	564	718	228	1,686
September	8	11	76	31	513	450	102	1,191
Totals	15	31	180	75	1,077	1,168	330	2,876
Same period 1956:								
Preliminary 2/	10	62	160	92	1,215	1,615	244	3,397
Revised 1/	15	70	191	110	1,342	1,891	529	4,148

Preliminary data on millfeed shipments under the freight assistance policy indicate shipments of 63,209 tons during the August-September period of the current crop year. This total, based on claims submitted up to October 31, 1957 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, 1956 claims had been filed for only 60,639 tons out of a total of 88,473 tons shipped during the first two months of the 1956-57 crop year. As with freight-assisted shipments of wheat, the greater portion of the millfeed shipments during the period under review went to destinations in Ontario and Quebec.

Provincial Distribution of Millfeed Shipments under the Freight Assistance Policy
August-September, 1957 and 1956

Province	1956		1957
	Preliminary 2/	Revised 1/	Preliminary 1/
- tons -			
Newfoundland	458	637	431
Prince Edward Island	953	1,462	1,307
Nova Scotia	4,388	5,833	4,254
New Brunswick	3,182	4,580	3,766
Quebec	31,030	44,280	28,679
Ontario	18,847	25,562	21,797
British Columbia	1,781	6,119	2,975
Totals	60,639	88,473	63,209

1/ Based on claims filed up to October 31, 1957.

2/ Based on claims filed up to October 31, 1956.

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>1955-56</u>					
August	19,777	469	3,003	23,250	22,228
September	14,877	292	3,816	18,985	16,718
October	14,075	416	3,091	17,582	19,776
November	16,447	440	3,839	20,726	21,362
December	10,323	429	2,810	13,562	15,953
January	19,053	476	2,742	22,270	20,969
February	16,985	537	3,069	20,592	22,066
March	17,631	130	3,353	21,115	23,027
April	28,974	1,333	3,207	33,514	32,360
May	37,350	1,149	3,846	42,345	39,712
June	42,219	1,246	3,656	47,121	49,735
July	24,233	322	3,565	28,120	29,724
Totals	261,943	7,238	40,000	309,181	313,630
<u>1956-57 ^{4/}</u>					
August	26,107	223	3,434	29,764	27,147
September	24,477	146	2,781	27,403	26,467
October	20,683	222	3,359	24,265	27,449
November	20,577	875	3,196	24,648	25,790
December	17,028	834	2,907	20,770	22,936
January	14,431	487	3,343	18,261	22,624
February	11,938	115	2,797	14,850	17,348
March	13,735	168	2,776	16,680	15,924
April	12,380	296	3,055	15,731	16,737
May	19,494	1,231	2,317	23,041	21,161
June	22,043	795	1,849	24,687	20,167
July	19,490	481	2,683	22,655	28,864
Totals	222,386	5,872	34,498	262,756	272,615
<u>1957-58 ^{4/}</u>					
August	24,313	403	2,477	27,193	22,886
September	20,659	507	2,740	23,906	26,712
October	17,231	684	3,477	21,392	18,117
Totals	62,204	1,593	8,694	72,491	67,715

^{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/} In terms of wheat equivalent. Exports for crop year 1955-56 adjusted to remove effect of time lag in the returns made by Customs for both wheat and wheat flour. Wheat flour conversion rate: 2.3 bushels per cwt.

^{4/} Subject to revision. Unadjusted customs returns.

Exports of Canadian Wheat and Wheat Flour by Destination, 1957-58

Destination	July	October		August-October	
	Wheat Flour 1/	Wheat Flour 2/	Wheat 3/	Wheat Flour 2/	Wheat 3/
- bushels -					
<u>COMMONWEALTH COUNTRIES</u>					
United Kingdom	912,741	1,123,021	6,877,584	3,109,800	26,320,432
<u>Africa</u>					
British East Africa	1,955	-	-	1,955	-
Federation of Rhodesia and Nyasaland ..	-	2,180	37,333	2,180	37,333
Ghana (Gold Coast)	18,745	11,937	-	123,926	-
Nigeria	21,457	3,885	-	14,267	-
Other British West Africa	6,440	-	-	-	-
Sierra Leone	15,065	9,119	-	56,299	-
<u>Asia</u>					
Hong Kong	29,555	49,968	18,667	119,706	18,667
India	-	-	-	20,355	-
Malaya and Singapore	17,705	46,039	-	92,435	-
Pakistan	-	-	-	115	-
<u>Europe</u>					
Gibraltar	5,152	1,546	-	7,728	-
Malta	-	-	-	-	368,107
<u>North America</u>					
Bahamas	13,214	27,474	-	64,925	-
Barbados	28,699	32,520	833	71,882	833
Bermuda	8,098	10,030	-	24,619	-
British Honduras	1,656	1,021	-	1,729	-
Jamaica	114,151	157,194	-	393,703	1,200
Leeward and Windward Islands	80,035	86,804	-	243,738	-
Trinidad and Tobago	104,825	175,957	-	427,547	-
<u>Oceania</u>					
Fiji	-	-	-	138	-
<u>South America</u>					
British Guiana	13,575	20,649	-	62,698	-
Totals, Commonwealth Countries	1,393,068	1,759,344	6,934,417	4,839,745	26,746,572
<u>FOREIGN COUNTRIES</u>					
<u>Africa</u>					
Azores and Madeira	-	3,032	-	4,998	-
Belgian Congo	19,585	42,849	-	63,077	-
Liberia	490	115	-	115	-
Portuguese East Africa	1,771	1,030	41,067	2,801	41,067
Portuguese West Africa	1,426	1,702	-	10,155	-
<u>Asia</u>					
Arabia	1,030	4,844	-	9,319	-
Iran	154	-	-	-	-
Japan	39,326	78,692	1,722,695	236,702	10,415,230
Jordan	-	-	-	-	-
Lebanon	-	10,377	-	11,125	-
Okinawa	-	-	-	-	115,733
Philippine Islands	433,417	710,875	-	1,504,789	-
Portuguese Asia	13,294	11,307	-	40,149	-
Syria	69	69	-	897	-
Thailand	22,368	12,765	-	78,545	-
<u>Europe</u>					
Austria	-	-	-	-	366,800
Belgium	21,070	31,685	829,714	78,101	2,882,966
Denmark	-	460	9,520	460	83,813

Exports of Canadian Wheat and Wheat Flour by Destination, 1957-58

Destination	July	October		August-October	
	Wheat Flour 1/	Wheat Flour 2/	Wheat 3/	Wheat Flour 2/	Wheat 3/
- bushels -					
<u>FOREIGN COUNTRIES</u>					
<u>Europe</u>					
Germany, Federal Republic	-	-	2,425,814	-	10,242,213
Greece	-	506	-	506	-
Iceland	-	4,830	-	12,880	-
Ireland	322	322	321,067	322	601,067
Italy	-	-	14,614	-	114,738
Netherlands	-	322	2,866,774	322	7,559,431
Norway	-	-	510,533	-	1,394,959
Portugal	6,348	3,855	-	7,075	-
Sweden	1,521	-	-	1,520	-
Switzerland	184	-	337,867	184	375,835
U.S.S.R. (Russia)	-	-	994,187	-	994,187
<u>North America</u>					
American Virgin Islands	-	-	-	46	-
Costa Rica	44,335	38,812	-	103,040	-
Cuba	8,280	44,850	1,000	74,184	1,000
Dominican Republic	34,976	59,743	-	144,291	-
El Salvador	24,497	6,900	-	31,740	-
French West Indies	1,150	345	-	1,955	-
Guatemala	3,562	8,165	-	15,983	22,047
Haiti	17,710	71,728	-	117,935	-
Honduras	11,270	6,026	-	11,891	-
Netherlands Antilles	10,714	11,489	-	38,270	-
Nicaragua	23,805	15,348	-	41,085	-
Panama	16,997	22,666	-	52,210	-
St. Pierre and Miquelon	747	2,323	-	5,497	-
United States					
Flour in terms of wheat	99,670	138,057	-	391,922	-
For Milling in bond 4/	-	-	64,231	-	196,196
For Domestic use 4/	-	-	619,578	-	1,396,907
<u>Oceania</u>					
French Oceania	1,065	9,625	-	15,403	-
Guam	-	-	-	1,840	-
<u>South America</u>					
Colombia	2,875	7,070	-	18,694	-
Ecuador	-	-	211,986	-	211,986
Peru	1,380	1,967	-	3,807	-
Surinam	11,141	10,205	-	33,757	-
Venezuela	212,552	342,900	9,504	686,527	33,904
Totals, Foreign Countries	1,089,101	1,717,856	10,980,151	3,854,119	37,050,079
Totals, All Countries	2,482,169	3,477,200	17,914,568	8,693,864	63,796,651

- 1/ In terms of wheat equivalent. Adjusted to remove effect of time lag in the returns made by Customs. Conversion rate: 2.3 bushels per cwt.
- 2/ In terms of wheat equivalent. Unadjusted Canadian Customs returns. Conversion: 2.3 bushels per cwt.
- 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			
	November 8	November 15	November 22	November 29
- cents and eighths per bushel -				
<u>Initial Payment to Producers</u>				
1 Northern	140	140	140	140
2 Northern	136	136	136	136
3 Northern	132	132	132	132
4 Northern	125	125	125	125
5 Wheat	108	108	108	108
6 Wheat	102	102	102	102
Feed Wheat	96	96	96	96
1 C.W. Garnet	122	122	122	122
2 C.W. Garnet	117	117	117	117
1 Alberta Red Winter	124	124	124	124
2 Alberta Winter	119	119	119	119
1 C.W. Amber Durum	150	150	150	150
2 C.W. Amber Durum	147	147	147	147
3 C.W. Amber Durum	140	140	140	140
<u>International Wheat Agreement</u> <u>and Domestic Sales</u>				
1 Northern	160/1	160/1	160/3	161/2
2 Northern	156/1	156/1	156/3	157/2
3 Northern	149/1	149/1	149/3	150/2
4 Northern	136/1	136/1	136/3	137/2
5 Wheat	124/1	124/1	125/1	126/2
6 Wheat	120/1	120/1	121/1	122/2
Feed Wheat	117/1	117/1	118/1	119/2
1 C.W. Garnet	154/1	154/1	154/3	155/2
2 C.W. Garnet	150/1	150/1	150/3	151/2
3 C.W. Garnet	147/1	147/1	147/3	148/2
1 Alberta Red Winter	150/1	150/1	150/3	151/2
2 Alberta Winter	146/1	146/1	146/3	147/2
3 Alberta Winter	141/1	141/1	141/3	142/2
1 C.W. Amber Durum	192/1	192/1	192/3	193/2
2 C.W. Amber Durum	191/1	191/1	191/3	192/2
3 C.W. Amber Durum	181/1	181/1	181/3	182/2
<u>Export - Class II</u>				
1 Northern	160/1	160/1	160/3	161/2
2 Northern	156/1	156/1	156/3	157/2
3 Northern	149/1	149/1	149/3	150/2
4 Northern	136/1	136/1	136/3	137/2
5 Wheat	124/1	124/1	125/1	126/2
6 Wheat	120/1	120/1	121/1	122/2
Feed Wheat	117/1	117/1	118/1	119/2
1 C.W. Garnet	154/1	154/1	154/3	155/2
2 C.W. Garnet	150/1	150/1	150/3	151/2
3 C.W. Garnet	147/1	147/1	147/3	148/2
1 C.W. Amber Durum	192/1	192/1	192/3	193/2
2 C.W. Amber Durum	191/1	191/1	191/3	192/2
3 C.W. Amber Durum	181/1	181/1	181/3	182/2

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

Class and Grade	Week Ending			
	November 8	November 15	November 22	November 29

- cents and eighths per bushel-

Initial Payment to Producers

1 Northern	140	140	140	140
2 Northern	136	136	136	136
3 Northern	132	132	132	132
4 Northern	125	125	125	125
5 Wheat	108	108	108	108
6 Wheat	102	102	102	102
Feed Wheat	96	96	96	96
1 C.W. Garnet	122	122	122	122
2 C.W. Garnet	117	117	117	117
1 Alberta Red Winter	124	124	124	124
2 Alberta Winter	119	119	119	119
1 C.W. Amber Durum	150	150	150	150
2 C.W. Amber Durum	147	147	147	147
3 C.W. Amber Durum	140	140	140	140

International Wheat Agreement
and Domestic Sales

1 Northern	171/1	171/3	172/3	173/2
2 Northern	167/1	167/3	168/3	169/2
3 Northern	161/1	161/3	162/3	163/2
4 Northern	150/1	150/3	151/3	152/2
5 Wheat	139/1	129/3	141/1	142/2
6 Wheat	123/1	123/3	125/1	126/2
Feed Wheat	122/1	122/3	124/1	125/2
1 C.W. Garnet	154/1	154/1	154/3	155/2
2 C.W. Garnet	150/1	150/1	150/3	151/2
3 C.W. Garnet	147/1	147/1	147/3	148/2
1 Alberta Red Winter	150/1	150/1	150/3	151/2
2 Alberta Winter	146/1	146/1	146/3	147/2
3 Alberta Winter	141/1	141/1	141/3	142/2

Export Class II

1 Northern	171/1	171/3	172/3	173/2
2 Northern	167/1	167/3	168/3	169/2
3 Northern	161/1	161/3	162/3	163/2
4 Northern	150/1	150/3	151/3	152/2
5 Wheat	139/1	139/3	141/1	142/2
6 Wheat	123/1	123/3	125/1	126/2
Feed Wheat	122/1	122/3	124/1	125/2
1 C.W. Garnet	154/1	154/1	154/3	155/2
2 C.W. Garnet	150/1	150/1	150/3	151/2
3 C.W. Garnet	147/1	147/1	147/3	148/2
1 Alberta Red Winter	150/1	150/1	150/3	151/2
2 Alberta Winter	146/1	146/1	146/3	147/2
3 Alberta Winter	141/1	141/1	141/3	142/2

CANADIAN FLOUR MILLING SITUATION

Production Wheat flour production by Canadian mills during October 1957 amounted to 3,688,000 hundredweight, 9 per cent greater than the September output of 3,373,000 hundredweight and 4 per cent greater than the October 1956 output of 3,542,000 hundredweight, but 6 per cent below the ten-year (1947-1956) average production for the month of October of 3,941,000 hundredweight. Mills reporting operations during October 1957 had a total rated capacity of 179,465 hundredweight per 24-hour day and on the basis of 26-day working period 79.0 per cent of this rated capacity was effective.

Wheat milled for flour during October 1957 amounted to 8.3 million bushels compared with 7.6 million bushels milled during the previous month and 8.0 million bushels milled during October 1956. Of the wheat milled for flour during October 1957, some 7,496,000 bushels were Western Canadian spring wheat (other than Durum) while the remainder consisted of Ontario winter wheat, (621,000 bushels); Durum, (129,000 bushels); and all other (69,000 bushels).

Exports According to preliminary Customs returns, exports of Canadian wheat flour during October 1957 amounted to 1,512,000 hundredweight (some 3,477,000 bushels of wheat equivalent) representing increases of 27 per cent from the 2,740,000 bushels exported during September this year and 13 per cent greater than the adjusted October 1956 figure of 3,084,000 bushels. Flour shipments during the month went to fifty-three countries, with exports to the United Kingdom amounting to 1.1 million bushels of wheat equivalent and accounting for 32 per cent of the October total. Other principal markets for Canadian wheat flour during the month with shipments in thousands of bushels of wheat equivalent were as follows: Philippine Islands, 711; Venezuela, 343; Trinidad and Tobago, 176; Jamaica, 157; and United States, 138.

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

Crop Year	Wheat Milled for flour	Wheat Flour	
		Production	Exports <u>1/</u>
	- bushels -		- cwt. -
1935-36-1939-40 average	67,845,114	29,405,451	9,603,941
1940-41-1944-45 average	99,704,638	43,908,245	23,699,546
1945-46	118,074,774	52,018,498	28,361,546
1946-47	127,775,176	56,033,374	33,116,617
1947-48	109,822,011	47,353,004	26,776,683
1948-49	90,896,984	39,944,794	20,947,620
1949-50	90,082,917	39,708,932	19,896,137
1950-51	106,748,343	46,315,153	24,356,912
1951-52	104,494,021	44,771,184	22,258,324
1952-53	106,727,237	46,776,625	24,609,199
1953-54	91,855,269	40,769,909	20,142,824
1954-55	92,406,768	40,606,599	17,692,945
1955-56	91,770,025	40,148,750	17,391,300
1956-57	85,149,373	37,623,446	14,999,307 <u>2/</u>
1957-58 <u>2/</u>			
August	7,094,364	3,151,879	1,076,815
September	7,629,799	3,372,860	1,191,300
October	8,315,059	3,688,086	1,511,826
Totals	23,039,222	10,212,825	3,779,941
Same period 1956-57 (revised)	23,147,785	10,184,833	4,007,586

1/ Based on Customs returns. Exports for the crop years 1945-46 to 1955-56 revised to remove effect of time lag in the returns made by Customs.

2/ Subject to revision.

UNITED STATES SITUATION

Supply Position Total estimated domestic supplies of wheat in the United States for the crop year 1957-58, consisting of the July 1 carryover of 908.4 million bushels and the 1957 crop placed at 927.3 million, amount to 1,835.7 million bushels, representing a decline of about 10 per cent from the 1956-57 total of 2,030.6 million. Imports of wheat and wheat flour in terms of grain equivalent from Canada for all purposes during the July-October period of the current United States crop year amounted to 2.3 million bushels. After deducting an estimated 592.0 million bushels for anticipated domestic requirements, some 1,246.0 million remain available for export and for carryover during 1957-58 compared with 1,451.2 million in 1956-57.

United States Wheat Supplies

Item	1956-57	1957-58 <u>1/</u>
	- million bushels -	
Carryover at beginning of crop year (July 1)	1,033.4	908.4
New crop	997.2	927.3
Total estimated domestic supplies	2,030.6	1,835.7
Imports of wheat and Wheat Flour in terms of wheat for domestic use, July-October	1.4	2.3
Total estimated supplies <u>2/</u>	2,032.0	1,838.0
Less estimated domestic requirements for crop year <u>3/</u>	580.8	592.0
Available for export and for carryover	1,451.2	1,246.0
Deduct:		
Exports of wheat as grain, July-October	141.4	112.9
Exports of wheat flour and products in terms of wheat, July-October	19.0	19.0
Total exports of wheat, wheat flour and products <u>4/</u>	160.4	131.8
Balance on November 1 for export and for carryover .	1,290.8	1,114.2

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. 4/ Revisions have been made to include exports by private donations, church organizations, etc. which have been excluded in previous data.

Exports of wheat, wheat flour and other products in terms of grain equivalent during the first four months of the 1957-58 United States crop year amounted to 131.8 million bushels, about 18 per cent below the 160.4 million exported during the same months in 1956. The balance remaining on November 1, 1957 for export and for carryover was estimated at 1,114.2 million bushels as against 1,290.8 million on the same date a year ago.

The Outlook for
Wheat 1958-59

The following account of the outlook for wheat supplies in the United States during the crop year 1958-59 has been extracted from a statement on wheat supplies and prices presented by Robert E. Post at the 35th Annual Agricultural Outlook Conference, Washington D.C., November 20, 1957:

The total acreage which will be placed in the 1958 Acreage Reserve Program is estimated at about 5.0 million acres, consisting of the 3.9 million acres of winter wheat put in through the close of the winter wheat sing-up October 4, and an allowance for spring wheat on the basis of the percentage of winter wheat offered in the spring wheat States.

With an allotment of 55 million acres for all wheat for 1958, the same as for 1956, it is assumed that without an Acreage Reserve Program about the same acreage would be seeded for the 1958 crop as the 61 million acres seeded for the 1956 crop. If 5 million acres are removed by the Acreage Reserve Program and average abandonment and diversion are assumed, about 50 million acres would be indicated for harvest in 1958.

If 20 bushels per harvested acre are obtained on 50 million acres, a crop of about a billion bushels would be produced in 1958. Yields per acre have been very high in recent years on the curtailed acreages. Thus far this year, moisture conditions have been excellent. If yields in 1958 are equal to the all-time record of 1957 of 21.5 bushels per acre, a crop well in excess of a billion bushels would be produced.

Domestic disappearance in 1958-59 is estimated at about 600 million bushels. This is a little above that of recent years to allow for some increased feeding. If the crop in 1958 should total around a billion bushels, exports in excess of 400 million bushels would be necessary to avoid an increase in carryover stocks. Exports of this size could well occur, depending upon the extent of Government financing, but a substantial decline in wheat carryover at the end of the 1958-59 marketing year would not be likely.

In this discussion, we have seen that the very large carryover was reduced 125 million bushels in the past marketing year and in the current 1957-58 marketing year it may be reduced another 50 million bushels, but that in 1958-59 a further substantial decline in carryover is not likely.

The Price Situation
and Outlook

The trend in wheat prices this year has again been moderately upward from the low point following harvest when movement to market was heavy. In mid-October prices received by farmers average \$1.92, which was slightly below the effective loan rate and 6 cents below a year earlier.

Through October 15, 153 million bushels of 1957 wheat had been placed under the support programs, compared with 198 million on the same date a year earlier. With prices in most areas still below the effective price support level, sufficient additional quantities are expected to be put under support so that prices will continue the usual seasonal advance. As a result, the average price of wheat to farmers in 1957-58 may again average near the national support level of \$2.00 per bushel.

The minimum national average support price for 1958-crop wheat was announced on April 19, 1957 at \$1.78 per bushel. This price reflected 75 per cent of estimated transitional parity, when announced in April 1957, and compared with \$2.00 for both 1956 and 1957. The minimum support will not be reduced but may be increased if a combination of the wheat parity price as of July 1, 1958 and the wheat supply relationships as of that date indicate a higher support price.

Payment Rates and Other
Provisions Announced
for 1958-Crop Acreage
Reserve

On November 21 Secretary of Agriculture Ezra Taft Benson announced the general provisions which will govern participation in the Acreage Reserve of the Soil Bank for spring-planted "basic" crops for 1958 production.

Agreements to put fall-seeded "winter" wheat in the Reserve were signed earlier in the year. General provisions of the program, as announced at that time for winter wheat, will apply to the spring-planted crops.

The Acreage Reserve is the part of the Soil Bank under which farmers agree to reduce their current year's acreage of upland cotton, corn, wheat, rice, and tobacco below their established acreage allotments, in return for payments designed to maintain net income for land put in the program. The other phase of the Soil Bank, the Conservation Reserve, helps farmers shift general cropland to conservation used under contracts running for 3, 5, or 10 years.

Highlights of the 1958 Acreage Reserve program, and principal changes from 1957 include:

Payment rates. Per-acre payment rates for the 1958 program (as listed later in this announcement) are somewhat higher for most crops than those which were in effect for 1957.

Premium rates. Farmers who took part in the 1957 Acreage Reserve will be paid a 10-per cent premium, above the 1958 compensation rate established for their farms, if they put the identical land in the 1958 program.

Eligible crops. "Allotment" acres of spring wheat, corn, upland cotton, rice, and tobacco are eligible for the 1958 Acreage Reserve. (These are the same crops which were eligible in 1957.)

Signup period. The signup period for the 1958 Acreage Reserve will open on January 13 and close March 7, 1958. For the early cotton area of Texas and the early tobacco area of Florida, permission will be granted to begin the signup at an earlier date.

Goals. The total goal for basic crops in the 1958 Acreage Reserve (as listed later in this announcement) is from 11.5 to 14.5 million acres.

Soil Bank "base". A Soil Bank "base" will be established for all farms taking part in the 1958 Acreage Reserve. This will be the total crop acreage figure for the farm, based primarily on production history for 1956 and 1957. Total harvested acreage in 1958 must be reduced below this "base" by the number of acres placed in the Soil Bank. A similar Soil Bank "base" has been in effect for the Conservation Reserve since that program was started. Farms that already have a "base" established under the Conservation Reserve or the 1958 Winter Wheat Acreage Reserve will use it for participation in the 1958 Acreage Reserve for spring-planted crops.

\$3,000 limit. There will be a limit of \$3,000 on the total of Acreage Reserve payments which can be made to any one producer, as required by the controlling legislation. This limit applies to each producer with regard to each farm he operates or in which he has an interest and share in the crop.

Total funds available. There is a limit of \$500,000,000 on total funds available for the 1958 Acreage Reserve programs -- a reduction by Congress from the \$750,000,000 available for this part of the Soil Bank as provided by the Original Act.

Commenting on the announcement of the 1958 Acreage Reserve program for spring-planted crops, Secretary Benson said, "The Acreage Reserve program is an important part of our overall effort to reduce burdensome surpluses. If the Reserve Acreage had been in production this year, at the very high 1957 yield averages, it would have added substantially to the total supply of several of our most troublesome basic crops.

"Programs to dispose of already accumulated surpluses are being pushed vigorously, and successfully. However, widespread participation in the Acreage Reserve will be needed to check the build-up of new surpluses -- and insure a continued 'two-way' attack on this fundamental problem.

"We hope farmers will avail themselves of the opportunity to use the program in taking part of their allotments out of production in 1958, co-operating to reach the goals for basic crops announced today. If they do -- adding this to the 6.5 million acres placed in the Conservation Reserve in 1957 and the 1958 goal of about 10 million additional 'conservation' acres -- they will take approximately 30 million acres out of unneeded, surplus production next year.

"This would be a big step forward in making needed adjustments. With the Soil Bank 'base' limitations in effect for the Acreage Reserve in 1958, reductions in basic crops will result in a net adjustment in total production -- and not just a shifting of acreage from one group of crops to another."

The changes in the 1958 national average per-acre rates are due to adjustments because of trends in crop yields, Department officials explained. The wheat goal, covering both spring and winter wheat has been adjusted downward from an original estimate of from 7 to 9 million acres. According to recent reports, slightly over 3.9 million acres of winter wheat were signed up for the 1958 Acreage Reserve.

To take part in the 1958 Acreage Reserve, eligible farmers will sign agreements with their county Agricultural Stabilization and Conservation (ASC) Committees.

Flour Production

The Bureau of the Census, Department of Commerce estimated wheat flour production in the United States in September 1957 at 20,584,000 sacks, an average of 1,029,000 sacks per working day. This compared with a daily average of 924,000 sacks during August 1957 and 1,047,000 sacks during September 1956. Production of wheat flour in September this year was at 95.1 per cent of capacity, compared with 85.2 per cent and 97.3 per cent, respectively, for the previous month and the same month a year ago. Flour mills in September ground an estimated 47,311,000 bushels of wheat compared with 46,796,000 bushels in August.

United States Exports of Wheat and Flour by Country of Destination,
July-September 1956 and July-September 1957

NOTE

These data on exports by destination cover only the first three months of the United States crop year beginning July 1. The table on United States wheat supplies (see page 20) contains a preliminary estimate of total exports for the first four months of the United States crop year. Neither of these tables should be confused with the United States export figure shown on page one of this publication which, for comparative purposes, is based on the Canadian crop year beginning August 1.

	July-September 1956			July-September 1957		
	Wheat	Flour 1/	Total	Wheat	Flour 1/	Total
- 1,000 bushels, grain equivalent -						
<u>Western Hemisphere</u>						
Central America	340	865	1,205	309	1,063	1,392
Cuba	849	767	1,616	1,262	902	2,164
British West Indies ...	-	796	796	-	690	690
Colombia	1,050	14	1,064	1,689	8	1,697
Venezuela	78	1,414	1,492	100	1,787	1,887
Bolivia	796	348	1,144	-	318	318
Chile	4,510	1	4,511	1,968	68	2,036
Brazil	4,047	1	4,048	5,574	1	5,575
Others	1,459	848	2,307	1,019	1,124	2,143
Total	13,129	5,054	18,183	11,921	5,981	17,902
<u>Europe</u>						
Norway	1,009	189	1,198	-	205	205
United Kingdom	7,163	468	7,631	4,646	229	4,875
Netherlands	7,589	738	8,327	1,265	851	2,116
Belgium-Luxembourg	6,032	6	6,038	668	4	672
France	17,560	-	17,560	-	4	4
West Germany	11,113	2	11,115	4,787	2	4,789
Austria	1,111	3	1,114	-	-	-
Switzerland	1,731	2	1,733	418	-	418
Finland	2,361	-	2,361	498	-	498
Poland	-	-	-	5,004	-	5,004
Portugal	3,131	18	3,149	288	13	301
Yugoslavia	779	4	783	1,596	2	1,598
Greece	2,282	-	2,282	-	-	-
Others	1,931	11	1,942	1,283	223	1,506
Total	63,792	1,441	65,233	20,453	1,533	21,986
<u>Asia</u>						
Turkey	-	-	-	1,957	-	1,957
Israel	2,387	2	2,389	2,400	5	2,405
India	2,522	2	2,524	28,375	13	28,388
Pakistan	4,239	-	4,239	238	-	238
Indonesia	-	1,107	1,107	-	-	-
Philippines	-	1,334	1,334	-	2,414	2,414
Korea	3,475	1	3,476	2,201	378	2,579
Formosa	1,451	-	1,451	1,201	5	1,206
Japan	10,875	375	11,250	12,739	599	13,338
Others	663	1,930	2,593	639	1,000	1,639
Total	25,612	4,751	30,363	49,750	4,414	54,164
<u>Others</u>						
Africa	2,600	1,713	4,313	761	1,787	2,548
Oceania	-	8	8	-	10	10
Unspecified 2/	768	400	1,168	-	2,923	2,923
Total	3,368	2,121	5,489	761	4,720	5,481
World total	105,901	13,367	119,268	82,885	16,648	99,533

1/ Wholly of U.S. wheat. 2/ Includes exports for relief or charity which are not included with the Bureau of the Census figures.

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	214 3/4 - 218 1/4	November 1	235 - 237
4	215 3/4 - 224 3/4	4	234 5/8 - 236 5/8
5	214 3/4 - 219 1/4	5	234 1/8 - 236 1/8
6	215 3/4 - 222 3/4	6	234 3/4 - 236 3/4
7	216 1/4 - 223 1/4	7	235 1/8 - 237 1/8
8	215 1/4 - 224	8	234 5/8 - 236 5/8
11	216 3/4 - 225 1/4	11	234 7/8 - 236 7/8
12	217 - 229 1/2	12	234 3/4 - 236 3/4
13	216 1/2 - 217 3/4	13	233 3/8 - 235 3/8
14	217 - 231	14	233 1/4 - 235 1/4
15	217 1/2 - 226 3/4	15	233 - 235
18	217 1/4 - 221	18	232 3/8 - 234 3/8
19	not available	19	232 3/4 - 234 3/4
20	215 - 227	20	232 3/8 - 234 3/8
21	215 1/2 - 220	21	233 3/8 - 235 3/8
22	216 - 226	22	233 3/4 - 235 3/4
25	216 3/4 - 229	25	233 5/8 - 235 5/8
26	216 1/4 - 228 1/2	26	234 5/8 - 236 5/8
27	216 3/4 - 226 3/4	27	235 - 237
28	Thanksgiving Day	28	Thanksgiving Day
29	215 1/2 - 221 1/2	29	235 3/8 - 237 3/8

Chicago Wheat Futures, High Points of Closing

Date	December	March	May	July	September
	- cents and eighths per bushel -				
November 1	218/7	223/5	219/1	197/7	200/2
4	219/4	224/4	220	198/3	200/4
5	219/2	224/2	219/7	198	200/2
6	219/2	224/2	220/3	198/2	200/5
7	219/1	224/1	220/2	198/4	200/7
8	219/7	224/7	221/3	197/7	202/1
11	221/1	226/1	222/2	199/6	202
12	221/3	226/2	222/3	199/5	201/6
13	219/6	224/4	221	199	201/2
14	218/7	224	220/7	198/7	201
15	218/5	223/5	220	198/3	200/4
18	218/4	223/4	220/3	198	200
19	218/3	223/5	220/2	197/5	199/7
20	217/2	222/5	219/4	196/6	199/1
21	217/6	223/2	220/5	196/7	199/1
22	219	224/2	221/2	196/2	198/5
25	218/6	224	220/1	196/4	197/4
26	220/1	225/2	221	196/6	199
27	219/5	224/7	220/5	197/5	200/2
28		Thanksgiving Day			
29	218/7	224/3	219/7	197/2	199/4

ARGENTINE SITUATION

Supply Position Total estimated supplies of wheat in the Argentine for the 1956-57 (December-November) crop year, consisting of the December 1, 1956 carryover of 48.3 million bushels and a production of 260.9 million, amount to 309.2 million bushels, exceeding by about 12 per cent the 1955-56 total of 276.0 million. After making an allowance for anticipated domestic requirements of 139.6 million bushels, some 169.6 million are available for export and for carryover during 1956-57 as against 140.0 million in 1955-56. Exports of wheat and wheat flour in terms of grain equivalent during the December-October period of the 1956-57 Argentine crop year have amounted to 89.7 million bushels, relatively unchanged from the 89.4 million exported during the same months of 1955-56. The balance remaining on November 1, 1957 for export and for carryover was estimated at 79.9 million bushels compared with 50.6 million at the same date in 1956.

Argentine Wheat Supplies

Item	1955-56	1956-57 <u>1/</u>
	- million bushels -	
Carryover at beginning of crop year (December 1) <u>2/</u>	83.1	48.3
New Crop	192.9	260.9
Total estimated domestic supplies	276.0	309.2
Less estimated domestic requirements for crop year	136.0	139.6
Available for export and for carryover	140.0	169.6
Deduct:		
Exports of wheat as grain, December-October	88.2	89.5
Exports of wheat flour in terms of wheat, Dec.-Oct. ...	1.2	0.1
Total exports of wheat and wheat flour	89.4	89.7
Balance on November 1 for export and for carryover	50.6	79.9

1/ Preliminary. 2/ Includes allowances for farm stocks.

The following account of the Argentine situation has been extracted from a report from Mr. C.S. Bissett, Commercial Counsellor, Buenos Aires, under date of November 20, 1957, 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 18 pesos to the United States dollar.

Weather and Crops

During the past month, temperature has been in general below normal. During October frosts occurred in several parts of the grain zone, centered in the province of Buenos Aires, and affected especially the drought ridden areas. It is too early yet to ascertain the actual extent of the damage.

Heavy rains which had occurred only in Entre Rios and parts of

Buenos Aires and Santa Fé, have just recently been widespread, resulting consequently in a more promising outlook for all crops.

Wheat No sales were reported during the past month. The Grain Board has resumed
1956-57 the publishing of their statistical position. As of November 4 the Board
Crop reported no more wheat available for export, while export sales to be fulfilled amounted to 1,141,959 metric tons (41,960,000 bushels) of which 514,038 tons (18,888,000 bushels) were already available in ports.

Wheat Harvesting is already starting in some early areas in the provinces of
1957-58 Córdoba and Santa Fé, with promising outlooks especially after the lately
Crop widespread rains. In some regions, especially the border zones of Buenos Aires, Santa Fé and Córdoba, crops have suffered both from drought and frosts. Some lots can be considered as lost, while others have been turned over completely to grazing or to further reseedling with corn or sunflower later on in the season. The latest estimate of the seeded area is 5,332,000 hectares (13,170,000 acres) and although officially a crop of no more than 4,500,000 metric tons (165.3 million bushels) is anticipated, some trade circles believe it will reach 5,000,000 tons (183.7 million bushels).

Corn Export sales during the last month totalled only 61,104 metric tons (2,406,000 bushels), all being "aforo" authorizations, while actual shipments reached 71,497 metric tons (2,815,000 bushels). This was an increase over the two previous periods. Seeding has continued under increasingly favourable conditions. It has been completed in Santa Fé and San Luis, but is still being carried on in the late areas. Only a few small lots have been affected either by drought or frosts and in general crops are reported in good and normal condition. No official estimate of the seeded area has yet been released but undoubtedly, as has been forecast, there has been a substantial increase in sowings of this grain.

Oats, Sales of these grains decreased sharply from the previous month totalling
Barley only 140,142 metric tons in October. Oats reached a bare 26,400 tons
and Rye (1,712,000 bushels) while barley accounted for 81,497 (3,743,000 bushels) and rye 32,242 (1,269,000 bushels). As of November 4 the Grain Board reports pending export sales to be fulfilled: 221,259 tons (14,347,000 bushels) for oats, 32,206 for rye (1,268,000 bushels) and practically none for barley.

As to the new crop, the dual purpose acreages of these grains, due to unfavourable weather conditions, have been entirely turned over to heavy grazing, with a consequent future loss in grain production. Improved conditions are reported for the purely grain acreages, especially barley.

Policy The Grain Board announced on November 6, 1957 that free trading would continue during the 1957-58 crop year for oats, barley, rye and flaxseed. However, a recent official decree announced that Government controls will continue for wheat during this crop year. New minimum guaranteed producers' prices were announced for this grain, modifying those set in May last. The new prices are 100 Argentine pesos (\$1.51 per bushel) for Semi-hard, Grade 2, hectolitr weight 78, (62 pounds per bushel) while 110 Argentine pesos (\$1.66 per bushel) will be paid for Durum wheat, both prices being per 100 kilos.

Partial Due to recent trade agreements, "aforos" for exports to Western
Decrease Germany, Czechoslovakia, Hungary and Poland, will not be subject to
in "Aforos" the surcharge previously imposed on them, i.e. 1 per cent for the first named country and 5 per cent for the others, with a consequent beneficial reduction for the exporter in the official market foreign exchange returns payable on all grain exports.

Grain Sales Sales during this past month decreased to less than one fourth of those of the previous period, totalling only 201,656 metric tons. Barley leads with 81,497 tons (3,743,000 bushels). Practically all of these were "aforo" authorizations viz. 45,230 (2,077,000 bushels) for multilateral currencies, 23,379 (1,074,000 bushels) for Western Germany, 5,000 (230,000 bushels) for Finland and 6,700 (308,000 bushels) for Yugoslavia. Lots amounting to 1,188 tons (55,000 bushels), were sold at Bahia Blanca, Necochea and Rosario at prices ranging from 893.30 to 863 (\$1.08 to \$1.04 per bushel). Corn was in second place with 61,104 tons (2,406,000 bushels) all "aforo" sales, viz., 49,245 (1,939,000 bushels) for multilateral currencies, 9,931 (391,000 bushels) for Western Germany and 1,862 (73,000 bushels) in £ sterling. Rye sales at 32,242 metric tons (1,269,000 bushels) consisted of 21,833 (860,000 bushels) under "aforo" authorizations, 19,000 (748,000 bushels) for multilateral, 2,833 (112,000 bushels) for Western Germany, while the Board sold the rest, 10,409 tons (410,000 bushels) at prices ranging from 901.30 to 855.70 (\$1.27 to \$1.21 per bushel). The decrease from last month was specially noticeable in regard to oats of which the total of only 25,903 tons (1,680,000 bushels) was in sharp contrast to the 423,111 (27,435,000 bushels) of September. Yugoslavia lead with 8,700 tons (564,000 bushels), followed by 8,380 (543,000 bushels) sold to multilateral countries, while Western Germany bought 6,000 (389,000 bushels) and Brazil and Czechoslovakia only 1,558 and 1,265 (101,000 and 82,000 bushels), respectively.

Grain Shipments Shipments this last month decreased from September to 347,935 metric tons. Wheat in first place totalled 186,248 metric tons (6,843,000 bushels). Brazil was its major destination with 86,961 metric tons (3,195,000 bushels), followed by Italy 23,135 (850,000 bushels), Western Germany 18,610 (684,000 bushels) and Belgium 13,650 (502,000 bushels) while the United Kingdom, Peru and Chile were at the same level of about 10,000 tons (367,000 bushels).

Argentine Wheat Exports, December 1956-October 1957 with Comparisons

Destination	Wheat	Destination	Wheat
	- thousand bushels -		- thousand bushels -
Africa, North	513	Italy	6,516
Africa, South	1,074	Netherlands	6,058
Austria	445	Norway	831
Belgium	3,880	Paraguay	1,348
Brazil	25,514	Peru	5,486
Chile	5,370	Spain	176
Denmark	1,801	Switzerland	1,453
Finland	162	United Kingdom	12,245
France	5,179	Yugoslavia	17
Germany	11,475		
		Total	89,542
Same Period:			
1955-56			82,850
1954-55			117,832
1953-54			97,918
1952-53			71,428
1951-52			3,786

Corn increased over each of the last three months to 71,497 tons (2,815,000 bushels). Italy was the main buyer with 29,471 tons (1,160,000 bushels) followed by Western Germany 17,413 (686,000 bushels), Belgium and Netherlands. Barley decreased slightly from September to 41,652 tons (1,912,000 bushels) Germany being the most important destination with 29,542 tons (1,357,000 bushels). Rye shipments increased to 27,705 (1,091,000 bushels), again with Western Germany leading with 10,400 tons (409,000 bushels) while lots of about 5,800 (228,000 bushels) went to each of Netherlands and Italy. Finally oats at 20,833 (1,351,000 bushels) although decreasing from September, were higher than during the two previous months. Italy received 8,947 tons (580,000 bushels) followed by Western Germany 4,639 (301,000 bushels) and Denmark 2,806 (182,000 bushels).

AUSTRALIAN SITUATION

Supply Position

Australian Wheat Supplies

Item	1955-56	1956-57 <u>1/</u>
	- million bushels -	
Carryover, including flour as wheat, at beginning of crop year (December 1)	91.6	83.9
New Crop	195.6	134.7
Total estimated supplies	287.2	218.6
Less estimated domestic requirements for crop year	72.5 <u>2/</u>	76.9 <u>2/</u>
Available for export and for carryover	214.7	141.7
Deduct:		
Exports of wheat as grain, December 1 - November 2	87.7	63.1
Exports of wheat flour in terms of wheat, December 1 - November 2	31.0	29.5
Total exports of wheat and wheat flour	118.7	92.6
Balance on November 3 for export and for carryover	96.0	49.1

1/ Preliminary. 2/ Revised.

Total estimated supplies of wheat in Australia for the 1956-57 (December-November) crop year, consisting of the December 1, 1956 carryover of 83.9 million bushels and a production of 134.7 million, amount to 218.6 million bushels compared with 287.2 million in the 1955-56 crop year. After making an allowance of some 76.9 million bushels for anticipated domestic requirements, an estimated 141.7 million were available for export and for carryover during 1956-57 as against 214.7 million in 1955-56.

Total exports of wheat as grain and wheat flour in terms of grain equivalent up to November 2 of the 1956-57 Australian crop year, at 92.6 million bushels, are about 22 per cent below the total of 118.7 million exported during the corresponding period of the 1955-56 crop year. The balance remaining on

November 3, 1957 for export and for carryover was estimated at 49.1 million bushels, as against 96.0 million at approximately the same date in 1956.

The following information relative to the Australian situation has been extracted from a report from Mr. T.G. Major, Commercial Counsellor for Canada, Melbourne, under date of November 13, 1957 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 \$2.1528 (Canadian), the quotation in effect on November 8, 1957.

Weather and Crops In most of the grain producing areas the long spell of dry weather was broken by good rains in the latter part of October. While the earlier October rains had been limited to Western Australia, parts of South Australia and southern Victoria, the later rainfall not only covered these areas but spread into the Mallee (Victoria) and the Riverina (New South Wales). In Queensland and neighbouring parts of New South Wales, the worst drought in 55 years was broken in the last week of the month by rains ranging from a half to five inches. However, both rainstorms missed the central and western parts of New South Wales. The rains were of little benefit to the Queensland wheat crop, but by bringing on the pastures and permitting the sowing of summer grains such as sorghum will ease the pressure on wheat supplies for feed in the grain-sheep areas. Likewise in the southern States, especially Victoria, better crops of wheat and coarse grains may be anticipated.

The situation in New South Wales, however, is serious in respect to both wheat and oats. Deliveries of wheat are not expected to exceed 3.5 million bushels instead of the 24 million delivered from last year's crop. It is clear now that wheat will have to be brought in from Western Australia and South Australia. A proposal by the Australian Wheat Board to import wheat from Canada for the port mills in Sydney and Brisbane was rejected by the Commonwealth Government which also declined to assist in freight costs from other States. It is reported that these costs will necessitate an increase of 4/- (43 cents) a bushel for wheat in New South Wales. Harvesting of the Queensland crop began in the last week of October, and the State Wheat Board estimates that the crop yet may reach 7 million bushels as compared with 8 millions last year. A safer estimate probably would be 6 million bushels.

The wheat crop in Victoria benefited greatly from the October rains, and it is now believed that deliveries will reach 18 to 20 million bushels, with a somewhat higher protein content than in 1956-57. The South Australian crop has been estimated at about 40 per cent of the 1956-57 crop, of which about 10 million bushels may be delivered to the Australian Wheat Board. Western Australia is the only State having a near normal crop with a marketable production likely to reach about 28.5 million bushels, from a total of 32.5 million. On November 12, the best estimate was for a total production of 80-85 million bushels for all Australia, from which it was expected that deliveries to the Wheat Board would amount to 68.5 million. This may be compared with a production of 134.7 million bushels in 1956-57 and 195.4 million bushels in 1955-56.

Wheat and Flour Sales The only sales reported by the Australian Wheat Board during the past four weeks are the following:-

Rhodesia	...	9,200 long tons (343,000 bushels)
Pakistan	...	14,000 long tons (523,000 bushels)
India	...	5,500 long tons (205,000 bushels)

Premium Wheat Seed Steps have been taken by the Australian Wheat Board to ensure supplies of premium wheat seed for the 1958-59 crop in New South Wales. The usual arrangements between growers and millers for the purchase of premium wheat are being suspended for the present season, and it has been agreed that the PremiumWheatgrowers' Association will arrange for the sale of such wheat for seed purposes only. Growers will be required to make deliveries in new bags, to declare the variety for delivery and submit a representative sample to the country agent of the Board's licensed receiver. Each bag must be clearly marked with the variety together with the grower's identification particulars. Arrangements will be made to stack each variety separately. In disposal, first preference will be given to sale for seed, and the growers will be paid appropriate premiums depending on the prices ultimately fixed. Any such wheat not sold for seed will be disposed of to the mills at appropriate premiums which will be passed on to the relevant growers.

Wheat Marketing A former Director of Agriculture in Western Australia, Dr. Geo. L. Sutton, claims that the Australian f.a.q. wheat marketing system, first introduced in 1888, is out of date and needs to be modernized. Originally it was designed to market one kind of wheat, whereas today as a result of the work of Australian plant breeders, there exist a wide range of varieties of different milling qualities. He cites the case of two cargoes of Australian wheat arriving in the United Kingdom during a single month recently, having a protein variability ranging from 7.92 to 12.54 per cent. Dr. Sutton advocates the segregation of wheat into classifications based on relative strength rather than the mixing together of all varieties, as is the case under the present f.a.q. system.

Wheat Pool Payments The Australian Wheat Board has announced final payments on November 19 amounting to £A2,245,300 (\$4.8 million) on Pools Nos. 18 and 18A (1954-55 season) bringing net distribution on these Pools (after deducting rail freight) to £A 83,293,600 (\$179.3 million). Payments were made at the rate of 3.250 pence (2.9 cents) per bushel for bulk wheat (except Western Australia) and 3.786 pence (3.4 cents) for bagged wheat.

Coarse Grains Barley. In general, the barley picture is similar to that of wheat, except in the lower Eyre Peninsula of South Australia, where prospects are even poorer. In Tasmania, there has been plenty of rain and the barley sowing season is in full swing. The Australian Barley Board has only 5,000 tons (233,000 bushels) remaining available for feed, and by rationing sales to not more than 50 bags per customer, feels that there will be sufficient to last until the new crop is harvested. Although the recent rains have benefited crops in most areas, the uncertainty regarding farm holdings for stock feed, gives rise to the view that not more than 50 per cent of last year's intake will be delivered to the Board.

Oats. Because of the uncertainty regarding the quantity which will be fed off or cut as hay, it is not possible at this stage to give any estimate of the probable grain production. Less than half of the 34.9 million bushel crop of 1956-57 is expected, mainly because of the almost complete failure for grain of the New South Wales crop, most of which has been fed off. In Victoria, an estimated 1,095,000 acres were sown, but a higher proportion than is usual will be grazed by stock. The State Department of Agriculture has estimated a production for grain of 2,612,000 bushels, less than a third of last year's yield.

Other Grains. In New South Wales, growers have been advised to sow as large an area as possible of maize. Good rain has fallen on many parts of the north coast and in other maize districts, providing sufficient soil moisture for

germination. Because of the shortage of wheat and oats there will be a good market for every bushel of corn produced.

The original estimate of 25,000 tons (1,000,000 bushels) of linseed from 120,000 acres in Queensland now has been reduced to not more than 12,000 tons (480,000 bushels).

The 1958 grain sorghum crop will depend largely on early summer rains. At this stage, no estimate of production can be made.

Exports of The Minister for Primary Industry has announced that the export of
Feed Grains all feed grains will be permitted only under licence until further
Licensed notice. This is due entirely to the effects of the long period of dry weather, and as soon as the difficult feed supply situation in some areas is relieved, the restrictions will be removed.

Exports of Australian Wheat and Wheat Flour in Terms of Wheat, December 1 -
November 2, 1956-57 and Corresponding Period 1955-56

Destination	Wheat		Wheat Flour	
	1955-56	1956-57	1955-56	1956-57
	- thousand bushels -			
Aden and Aden I/T	42	62	1,126	902
Belgian Congo	-	-	5	2
British North Borneo	-	-	199	200
British West Indies	2	1	289	319
Brunei	-	-	28	32
Burma	109	-	781	1,000
Ceylon	11	7	5,498	6,751
Cocos Islands	-	-	1	1/
Cyprus	704	353	1	1/
Czechoslovakia	356	315	-	-
Dutch New Guinea	-	-	52	66
Egypt (a/c War Office)	-	-	5	-
Eire	312	1,177	-	-
France	1,121	-	-	-
Germany, East	336	-	-	-
Germany, West	9,605	4,350	-	-
Ghana	-	-	-	1/
Hong Kong	1,030	1,503	-	-
Hong Kong (General)	-	-	327	283
Hong Kong (a/c War Office)	-	-	46	38
India	19,919	6,698	-	-
Indonesia	-	5	7,127	4,493
Iran	802	1,294	-	-
Iraq	1,573	1,395	-	-
Italy (a/c S/S)	-	-	27	12
Japan	9,888	3,284	-	-
Kenya	357	-	-	-
Kure (a/c War Office)	-	-	19	-
Libya	-	-	2	-
Macao	-	-	18	15
Malaya	614	800	-	-
Malaya (General)	-	-	5,468	5,014

Exports of Australian Wheat and Wheat Flour in Terms of Wheat, December 1 -
November 2, 1956-57 and Corresponding Period 1955-56

Destination	Wheat		Wheat Flour	
	1955-56	1956-57	1955-56	1956-57
- thousand bushels -				
Malaya (a/c War Office)	-	-	136	108
Maldives Islands	-	-	-	27
Malta	570	332	-	-
Mauritius	1	-	649	913
Middle East (a/c U.N.R.W.A.)	-	-	53	74
New Zealand	9,159	9,228	2	9
Nigeria	-	-	1	1
Nyasaland	-	-	113	108
Pacific Islands	29	21	2,397	2,076
Pakistan	3,125	7,462	-	-
Persian Gulf	105	71	183	430
Philippine Islands	-	-	349	1,105
Poland	1,862	-	-	-
Port Said (a/c S/S)	-	-	51	-
Portuguese East Africa	333	469	-	-
Portuguese India (Goa)	29	186	39	97
Rhodesia	1,652	2,158	-	-
Roumania	1,156	-	-	-
Sarawak	-	-	192	156
Saudi Arabia	192	22	23	16
Scandinavia	-	20	-	-
Seychelles Islands	-	-	29	30
Somaliland, British	-	-	17	2
Somaliland, French	-	-	46	-
Sudan	-	-	973	1,164
Syria	338	-	-	-
Thailand (Siam)	6	7	740	750
Timor	-	-	24	16
United Kingdom	22,381	21,874	3,545	2,772
Yugoslavia	-	-	1/	-
Zanzibar	11	9	247	383
Royal Navy	17	21	21	14
Ships' Stores	-	-	152	122
Totals	87,747	63,124	31,000	29,500

1/ Less than 500 bushels.

FRENCH SITUATION

The following account of the current crop situation in France has been extracted from recent reports provided by Mr. Campbell Smith, Commercial Counsellor and Miss V.J. Wightman, Agricultural Attaché, Canadian Embassy, Paris, 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 .002273 Canadian dollars. Germany

D. Mark equals .2288 Canadian dollars the quotation in effect on November 8, 1957.

Crop Estimate The November 1 estimate of Ministry of Agriculture places the 1957 wheat crop at 11 million tons (404.2 million bushels). This reverts to the level estimated last June before adverse weather in July caused fears that the volume might be reduced. This represents a new record, comparable only with the 10.5 million tons (385.8 million bushels) harvested in 1954.

The barley crop is placed at 3.7 million tons (169.9 million bushels) which is considerably lower than last year's 6.4 million (293.9 million bushels), the latter being due to exceptional circumstances: it is, however, well ahead of the 2.7 million (124 million bushels) produced in 1955, and underlines the upward trend in barley output.

Rye production at 472,000 tons (18.6 million bushels) shows little change from 1956, whereas oats production at 2.7 million tons (175.1 million bushels) is considerably below the past few years.

Farmers' Marketings Wheat deliveries to country elevators and warehouses are reported to be the highest ever registered for October 1. A comparison with the previous year would be misleading because of the frost damage in 1956, but this year's deliveries at October 1 of 4.9 million tons (180,044,000 bushels) are well ahead of the 4.5 million (165,347,000 bushels) at the same period in 1955, the last "normal" year. It is therefore quite possible that total deliveries may surpass the earlier estimates of 8 million tons (293,950,000 bushels).

Barley marketings at 850,000 tons (39,040,000 bushels) are understandably lower than the 1.4 million (64,301,000 bushels) emanating from the record crop in 1956 (which was almost twice the current level). Furthermore, deliveries have tended to fall off latterly, with the advance in hog prices.

New Grain Plan Under Discussion Discussions are progressing on a new Grain Plan to replace that of 1954-1957, and to cover the years 1958-1961, the same as for the target prices (see last month's report). With the price base established, the new measures deal mainly with the quantity of wheat to enjoy the price guarantee.

The Central Council of the Grain Board has approved the main features of a new plan, and its general lines are understood to be accepted by the government. The quota enjoying the guaranteed price, which heretofore has applied to 6.8 million tons (249,857,000 bushels), would with the 1958 crop, be raised to 7.2 million (264,555,000 bushels), and may rise to 7.5 million tons (275,578,000 bushels) as and when a long term contract for wheat is concluded within the Common Market.

Recently, with a normal crop, farmers' marketings have ranged from 8.0 to 8.5 million tons (293,950,000 to 312,321,000 bushels), and while the French government hopes to reduce the wheat acreage, they realize that rising yields will offset this and normally provide a crop no less than this year's level. In fact, the Modernization Plan forecasts wheat production of 12 million tons (440.9 million bushels) by 1961. The marketing quota is established yearly as a percentage of estimated total marketings and applied as a percentage to individual deliveries.

In the new Plan as at present, wheat delivered outside the quota would be paid at the average price received at export during the season. It is suggested that farmers be allowed to take back up to 200 quintals (735 bushels) outside this quota, denatured, as subsidized feed. One controversial proposal

is that farmers who reduce their marketings by 10 per cent from an average of the past few seasons (possibly 1953-54-55), should be exempt from the marketing quota; this is intended to discourage wheat deliveries but would obviously introduce further complications into the pricing system.

Other suggested provisions are the gradual reduction of the levy on marketings (to help offset the export subsidy) from the present average of 180 francs per quintal (11 cents per bushel) to a standard 130 francs (8 cents per bushel) by 1961, and continuance of present exemption from any such levies for farmers delivering under 50 quintals (184 bushels). The importance of this latter feature may be appreciated from the fact that 600,000 growers market under 50 quintals (184 bushels) of wheat each, and even 200,000 deliver ten quintals (37 bushels) or under.

These provisions will continue, in modified form, the present multiple pricing system. This is designed essentially to provide a decent price for wheat as the basic cash crop on small farms, and yet at the same time, not permit excessive profits to the efficient, large-scale wheat producers of the North.

Place of Wheat
In Farm Income

On the basis of the above proposed Plan, and the target prices reported last month, the French Wheat Producers Association has made a calculation of farm income from wheat over the next few years. This season, with marketings estimated at 8 million tons (293,950,000 bushels), they consider that income from wheat should amount to around 236.9 billion francs (\$5,385 million). For the years up to 1961, they continue with hypothetical marketings of 8 million tons (293,950,000 bushels) since a combination of rising yields and slightly lower area seeded may provide crops fairly close to this year's level.

They therefore anticipate that income from wheat will rise slightly with the 1958 crop, partly as a result of the higher marketing quota, to 238.9 billion francs (\$5,430 million). Thereafter, with the target price declining, there will be a gradual reduction, back to 233.2 billion francs (\$5,301 million) by 1961 which is a little lower than in the current season. If, however, the marketing quota is raised to 7.5 million tons (275,578,000 bushels) as a result of contracts within the Common Market, estimated income at 236.3 billion francs (\$5,371 million) would not be far from the current level.

During recent years, wheat has accounted for 12.5 per cent of gross farm income. It is expected that, by encouraging livestock output, the relative position of wheat will decline, but if the goals of the Plan can be met, overall farm income should be raised by around 400 billion francs (\$9,092 million) by 1961, the chief gains being from beef, eggs, pork, dairy products, and sugarbeet.

A similar calculation has been made for barley. The Association anticipates that barley marketings during the next few years should yield around 53 billion francs (\$1,205 million) annually, which is an increase of 15 billion (\$341 million) from the average value in 1952-1955. By 1961, the government planners estimate barley marketings at 2 million tons (91,858,000 bushels) of which possibly three-quarters would be exported (including 200,000 tons (9,186,000 bushels) of brewers barley).

French Export
Position

A recent meeting of the Central Council of the French Grain Board reviewed the current market position of grain: 1,346,000 tons (49,457,000 bushels) of wheat had been sold by November 5, but under half a million tons (18,372,000 bushels) have actually left the country.

As a result of this backlog, and with the progress made towards the export goal of 2 million tons (73,487,000 bushels) for the current season, the export subsidy was recently reduced, which acts as a brake on sales. Of the above figures, 70 per cent consisted of milling wheat, 11 per cent feed wheat and the remaining 19 per cent consisted of flour (wheat equivalent).

Around 200,000 tons (7,349,000 bushels) each have been sold to Germany and the United Kingdom; about a quarter of the quantity for the U.K. consists of feed wheat, and feed represents one-fifth of sales to Germany. Substantial wheat sales have also been made to Pakistan, Netherlands, Norway, Portugal and Czechoslovakia.

The export program for flour has also been pushed, in order to utilize French milling capacity as far as possible; orders have been placed in Egypt, Indonesia and Ceylon.

With farmers' marketings at a high level, there is the possibility that the wheat export program may be raised to 2.2 or even 2.3 million tons (80,836,000 to 84,511,000 bushels). This would presumably be decided in the early spring once the authorities are assured that fall sowings have escaped frost damage during the winter.

Barley At the time of writing, France had temporarily withdrawn from the barley market. By early November, barley sales had reached 330,000 tons (15,157,000 bushels). Recently, marketings have tended to fall off since, with the advance in hog prices, farmers find it more profitable to feed the barley. It would therefore appear that the government's program to increase livestock output, with higher prices, will reduce France's potential barley exports during the current season.

Renewal of Franco-German Agreement On Grain With the renewal of the Franco-German trade agreement for a further year ending September 30, 1958, France is assured of a market in Germany for 500,000 tons of wheat (18,372,000 bushels), valued in the agreement at 140 million D.M. (\$32 million), and 200,000 tons of other grains (mainly barley) valued at 52 million D.M. (\$12 million). These are the same quantities as prescribed in last year's agreement.

CALENDAR OF WHEAT EVENTS

- November 1 According to the November estimate of production the French Ministry of Agriculture places the 1957 wheat crop in France at a record 11 million metric tons (404.2 million bushels).
- 14 Mr. A. Davidson of Manningtree, Essex, England, was named the world's wheat champion at the Toronto Royal Agricultural Winter Fair. It was the first world wheat championship for Britain.
- 25 The Prairie Grain Advance Payments Act, providing for the payment of cash advances on western wheat, oats and barley was proclaimed.
- December 1 Jerry Leiske of Beiseker, Alberta won the wheat championship for the third consecutive year at the Chicago International Livestock Exposition with his sample of Chinook.
- 9 According to "Foreign Crops and Markets" published by the United States Department of Agriculture wheat production in Egypt in 1957 is officially estimated at about 54 million bushels, some 5 per cent below the 1956 harvest.

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