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CANADA

DEPARTMENT OF TRADE AND COMMERCE

DOMINION BUREAU OF STATISTICS

AGRICULTURAL BRANCH

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MONTHLY REVIEW  
OF THE  
WHEAT SITUATION

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DEPARTMENT OF TRADE AND COMMERCE  
DOMINION BUREAU OF STATISTICS - CANADA

AGRICULTURAL BRANCH

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The World Wheat Situation.

In the last issue of the Monthly Review of the Wheat Situation, it was pointed out that natural phenomena such as scarcity or abundance of moisture and seasonable or unseasonable temperatures were determining factors in wheat production and that the month of June was a period of great uncertainty in respect to growing crops on eighty per cent of the world's wheat acreage. During the month of June and the early part of July, the forces of nature played an important part in changing the supply situation for the coming cereal year.

Adverse climatic conditions have been experienced over the wheat areas of the United States and Western Canada with resultant damage to growing crops. The crop situation in North America changed and changed rapidly during the month of June. On May 31, prospects for the United States spring wheat crop were officially described as "average". On the same date, prospects for the Canadian wheat crop were somewhat better than for several years. During the month of June, however, a combination of extreme heat and drought caused severe damage to growing crops in the north-western States and in the central and southern areas of the Prairie Provinces. At the end of June, the United States Department of Agriculture estimated the spring wheat crop of that country at 160 million bushels as compared with an average production of 271 million bushels from 1926 to 1930. On May 31 the condition of the Canadian wheat crop was given at 99 per cent of the long-time average, while at the end of June the condition was placed at 77 per cent. These figures reveal a heavy decline in the condition of the Canadian crop during the month of June.

The situation in the United States in respect to 1933 production is attracting widespread attention. With winter wheat production estimated at 336 million bushels and spring wheat production estimated at 160 million bushels, total estimated production for 1933 amounts to 496 million bushels. In recent years domestic consumption of wheat has amounted to about 725 million bushels but this included over 100 million bushels fed to live stock. Even allowing for a reduction in the amount of wheat fed on farms in the coming crop year, 1933 production falls short of the domestic requirements of the United States and the accumulated carry-over will have to be drawn upon to the extent of at least 100 million bushels to satisfy the domestic market. The present crop situation holds the possibility that the United States will not be anxious to export wheat during 1932-33 and will be able to end the coming crop year with a carry-over in line with reserves required by the domestic market.

The rapid deterioration of wheat crops in North America during the month of June and the early part of July has been accompanied by sharp advances in wheat prices in Chicago and Winnipeg. On June 1 the Winnipeg cash closing price for No. 1 Northern wheat was 64 $\frac{1}{4}$  cents per bushel while on July 15 the cash closing price for the same grade of wheat was 92 $\frac{1}{2}$  cents per bushel, an advance of 28 $\frac{1}{4}$  cents per bushel during the six-week period. Since the first of the year wheat prices have advanced over 50 cents per bushel on the Winnipeg market.

### International Trade.

While an unusual crop situation has been developing in Canada and the United States, the international movement of wheat has continued on a small scale. During the past six weeks world shipments have averaged only 9 million bushels per week, over half of which originated in the Argentine and Australia. From August 1, 1932, to July 16, 1933, world shipments of wheat and wheatflour have amounted to 595 million bushels compared with shipments of 751 million bushels for the same period in 1931-32. It is now apparent that world trade in wheat during 1932-33 will amount to about 615 million bushels or only slightly higher than in 1929-30 when trade was decidedly small. In the face of a restricted international movement of wheat during the present crop year Canada and Australia have increased exports over the levels of 1931-32. The failure of Russia, the Danubian countries and the United States to take an active part in the wheat market in 1932-33 has enabled the Empire exporting countries to record a satisfactory achievement. The limited extent of world trade in wheat during 1932-33 can be attributed to a number of causes among which may be mentioned the large European crops of 1932, the maintenance of rigid restrictions governing the importation of wheat into many deficit areas and the general difficulties of maintaining trade in the face of curtailed purchasing power and fluctuating exchanges.

### European Situation.

The small volume of world trade in wheat in recent weeks partially reflects the proximity of the 1933 harvest in Europe. Harvesting is now under way in southern Europe and is not far distant in western and northern Europe. Crop news is conflicting at the present time but indicates somewhat smaller production in northern Europe and considerably larger production of wheat in the Danubian area than in 1932. Early estimates of European crops are uncertain, however, and conditions under which crops are finally harvested affect both the volume of production and the milling quality of the new wheat.

Data in regard to Russia are very vague at the moment but it would appear that 1933 crops received a good start especially in the Ukraine, Central Black Soil Region and Middle and Lower Volga. The immediate question is whether or not Russia will export wheat during the coming crop year. If internal conditions are the decisive factor, it is unlikely that Russia will export wheat, but experience has shown that the needs of the Soviet Government may prompt exports from an insufficient domestic supply of foodstuffs. The new plan for collecting cereals by the government whereby individual and collective peasants may dispose of their surplus as they desire after delivering a fixed quota to the state is intended to stimulate improved farming methods and facilitate governmental collections. This plan will govern the distribution of the 1933 crop and may influence Soviet policy in regard to wheat exports in the coming crop year.

### Canadian Situation.

During the past month, the Canadian wheat situation has been characterized by moderate marketings by farmers in the West, a relatively small export movement and the maintenance of a high visible supply. On July 14, 1933, stocks of wheat in store amounted to 201 million bushels compared with 134 million bushels at the same date in 1931-32. Taking the crop year as a whole, however, Canadian exports of wheat have been satisfactory. During the eleven months ending June 30, exports of wheat and wheat-flour have amounted to 246 million bushels compared with 185 million bushels for the same period in 1931-32.



The Situation in North America

World wide attention has been focussed on wheat crops in Canada and the United States during the past month. The crop situation in North America first received consideration with the unfavourable start received by the United States winter wheat crop in the fall of 1932. The extent of the damage sustained by this crop was more fully realized in the spring of 1933 when it became evident that about 30 per cent of the originally sown acreage had been abandoned and that the condition of the remaining crop was very poor. These conditions were crystallized in the official reports issued by the United States Department of Agriculture in April, May and June when the 1933 winter wheat crop was estimated at from 334 to 341 million bushels.

The month of June brought startling developments in the North American situation when unfavourable climatic conditions spread in a northerly direction and damaged the spring wheat crops of the United States and Canada. On June 1, 1933 crop prospects in the spring wheat areas of the United States were described as "average," while the Canadian situation was probably the most favourable for several years. In June climatic conditions turned very unfavourable for growing crops and serious damage was sustained by spring wheat crops in the United States and the southern areas of the Prairie Provinces. Extreme heat combined with drought is a condition usually associated with the month of July. This season however the young wheat plant was subjected to these elements early in its growth and permanent damage was sustained. On July 9, 1933 the United States Department of Agriculture estimated the 1933 spring wheat crop at 160 million bushels compared with 265 million bushels in 1932 and an average crop of 271 million bushels from 1926 to 1930. On July 11 the Dominion Bureau of Statistics issued a report showing a sharp reduction in the condition of the wheat crop in all three Prairie Provinces. The net result of climatic conditions during June was to greatly reduce prospective wheat production in both Canada and the United States.

The importance of the crop situation briefly outlined above may be indicated by reference to the possible supply situation for the coming crop year. Since the United States Department of Agriculture has estimated both winter and spring wheat crops the situation in that country is more definite than in Canada. It is interesting to relate the prospective supply situation in the United States with the situation that has existed during recent years. The following table shows annual carry-overs, estimated production, estimated disappearance and the surplus over domestic requirements in the United States from 1928-29 to 1932-33. (1)

	<u>1928-29</u>	<u>1929-30</u>	<u>1930-31</u>	<u>1931-32</u>	<u>1932-33</u>	<u>Average 28-29 to 32-33</u>
	(Million Bushels)					
Carry-over	124	242	291	319	363	268
New Crop	926	813	853	900	726	844
Total Supplies	1,050	1,055	1,149	1,219	1,089	1,112
Domestic Disappearance	663	621	715	729	725(2)	691
Surplus for Carry-over or Export	387	434	434	490	364	421

(1) Data from 1928-29 to 1931-32 from Food Research Institute.

(2) Estimated.

It will be noted from the above table that during the five years from 1928-29 to 1932-33 that the United States surplus over and above domestic requirements has averaged 421 million bushels per year. It is this surplus which has weighed heavily upon domestic and world markets during the past four years.

The probable supply situation in the United States during 1933-34 depends upon three factors, namely, the extent of the carry-over, the accuracy of present estimates of the 1933 crops and estimated consumption of wheat during the coming crop year. These factors may be roughly indicated at the present time in order to evaluate the supply situation.

It is probable that the United States carry-over was about 360 million bushels on June 30, 1933. The new crops are estimated at 496 million bushels, making a total prospective supply of 856 million bushels. During the past few years, the unusual volume of wheat being fed to live stock has increased domestic utilization of wheat in the United States to over 700 million bushels. In view of higher price levels and reduced supplies it is probable that farm consumption will be lower during the coming crop year in spite of reduced supplies of feed grains. Assuming domestic consumption of 650 million bushels for 1933-34, the surplus for export and carry-over amounts to 206 million bushels or 154 million bushels smaller than the carry-over on June 30, 1933. This means that about 154 million bushels of the June carry-over will have to be used to augment 1933 production to provide for domestic requirements. The surplus of slightly over 200 million bushels is not in excess of a normal carry-over for the United States if acreage is reduced in accordance with existing plans.

The estimates contained in the foregoing paragraph may be compared with the situation that existed in the preceding five years.

	<u>Average</u> <u>1928-29 to 1932-33</u>	<u>1933</u> (Prospective)
	(Million Bushels)	
Carry-over	268	360
New Crop	844	496
Total Supplies	<u>1,112</u>	<u>856</u>
Domestic Consumption	691	650
Surplus for Export & Carry-over	<u>421</u>	<u>206</u>

It will be seen from the above table that the June 30 carry-over in the United States will be about 90 million bushels higher than the average of the preceding five years. Production on the other hand is estimated at about 348 million bushels less than the average of the five preceding years. Estimating domestic consumption at about 41 million bushels less than the average for the five preceding crop years, the surplus available for export and carry-over during 1933-34 is 215 million bushels smaller than the average surplus from 1928-29 to 1932-33.

The combination of circumstances affecting the production of wheat in the United States has meant the possibility of that country emerging from the coming crop year with what might be considered a normal surplus. Changes in current crop estimates and domestic utilization of wheat in the United States during 1933-34 may affect the foregoing calculations.

Condition figures for the Prairie Provinces at the end of June indicated that crop damage had been sufficient to ensure a crop considerably below average. It is probable even on the basis of a considerable increase in the Canadian carry-over on July 31 as compared with a year ago, that Canada will not have a total surplus any larger than during 1932-33 and probably somewhat less.



It is apparent from the foregoing paragraphs that nature has profoundly affected the supply of wheat in North America this year. Adverse climatic conditions have reduced probable yield from the central portions of the Prairie Provinces in Canada to the southernmost wheat areas of the United States. In regard to the development of crops in the United States during the present season the Crop Reporting Board of the United States Department of Agriculture states; -

"The acreage planted to crops has been reduced and exceedingly low yields are in prospect. The Board characterizes the first six months of 1933 as being less favorable for crop production than the corresponding portion of any crop season in fifty years. The estimates indicate that even with average weather during the remainder of the growing season the wheat crop will be the smallest in this country since 1893. Corn production seems likely to fall below 2,400,000,000 bushels for the fourth time in thirty-two years. Oats production, which has exceeded a billion bushels every year since 1911 seems likely to fall below 700,000,000 bushels for the first time since 1897, and hay production is expected to be almost as low as in the drought years of 1930 and 1931. These crops, with cotton, for which the Board has not estimated production, cover about 300 million acres or about 86 per cent of the acreage of all field crops this season.

"The total acreage in crops on July 1 was between five and six per cent below the acreage harvested last year. The reduction was due to various causes including low prices and financial difficulties at planting time, the loss of 13,183,000 acres of winter wheat sown last fall; unfavorable planting conditions during May in the Eastern Corn Belt as a result of continuous wet weather; and loss of a large acreage of spring grain and flax during June as a result of drought and heat in the Western Corn Belt, only a small part of which will be salvaged as hay. The acreage for harvest will be further reduced if the drought is not quickly relieved in the areas that are still dry. On the other hand a large acreage of emergency crops could still be planted if rain comes in time.

"The crop areas of the country as a whole had only about half of the normal rainfall during June and in the Mississippi Basin they had only about one-third of the normal rainfall. At the same time the temperature averaged above normal nearly everywhere and from the lower Ohio Valley, Missouri and Kansas northward it was the hottest June on record. Many crops suffered so severely during June that the final yield is problematical. The reports of crop correspondents on the condition of the crops on July 1 showed new low records for that date for oats, wheat, barley, rye, flax, potatoes, sweet potatoes, tobacco, peanuts and pastures. The condition of hay crops was the lowest for July 1 since 1911 and the condition of corn was the second lowest on record.

"In the case of many crops nothing comparable with the present situation has ever been reported. Thus, the condition of oats was reported at 49.3 per cent of "normal" while the lowest condition previously reported on July 1 was 68.8 in 1911. The condition of potatoes was reported as 72.2 compared with the previous low of 76 set in 1911. The condition of pastures was reported as 60.5 compared with 74.6 in July, 1930, 73.0 in 1925, 67.2 in 1911 and 69.9 in 1883. These low condition reports show the critical conditions prevailing at the beginning of the month. Many of the crops maturing later in the season, however, can still make considerable recovery if conditions improve."

### Southern Hemisphere

The last few weeks of the crop year finds Australia with her crop well sold and the Argentine shipping out wheat steadily. These two countries have enjoyed a substantial share of world trade in wheat this year. Out of total world shipments of 595 million bushels since August 1, 1932, the Argentine and Australia have contributed 270 million bushels, or 45 per cent. During the preceding crop year (1931-32) Australia and the Argentine cleared 291 million bushels out of total world shipments of 769 million bushels or 38 per cent. It is apparent from these figures that the Argentine and Australia have received a larger percentage of total world trade in wheat during the present crop year than during 1931-32. This is largely due to the persistent selling of Australia and her success in the Orient during the past year. In spite of a reduced volume of world trade during the present crop year Australia has exported about the same volume of wheat as in 1931-32.

From August 1, 1932, to July 16, 1933, Australian shipments have amounted to 151 million bushels compared with 150 million bushels for the same period in 1931-32. The Canadian Trade Commissioner for Australia advises that Australia has shipped 118 million bushels of wheat. Of this amount 54 million bushels were shipped to the United Kingdom and continental Europe and 64 million bushels to ex-European countries, chiefly China and Japan. The same authority also advises that some 14 million bushels are booked for shipment and that the remaining unsold surplus does not amount to more than 18 million bushels. These figures indicate that the 1932 Australian crop is likely disposed of with practically five months elapsing before the 1933 crop will be harvested. Drought preceding and during seeding has caused a reduction in acreage in Australia and prospects are that the 1933 Australia crop will be somewhat smaller than crops harvested during the past two years.

From August 1, 1932, to July 16, 1933, the Argentine shipped 119 million bushels of wheat compared with 138 million bushels during the same period in 1931-32.

The Argentine still has considerable wheat to export before the 1933 crop is harvested at the end of the year. It is likely, therefore, that the Argentine will continue to ship moderate quantities of wheat for some time.

### European Crops

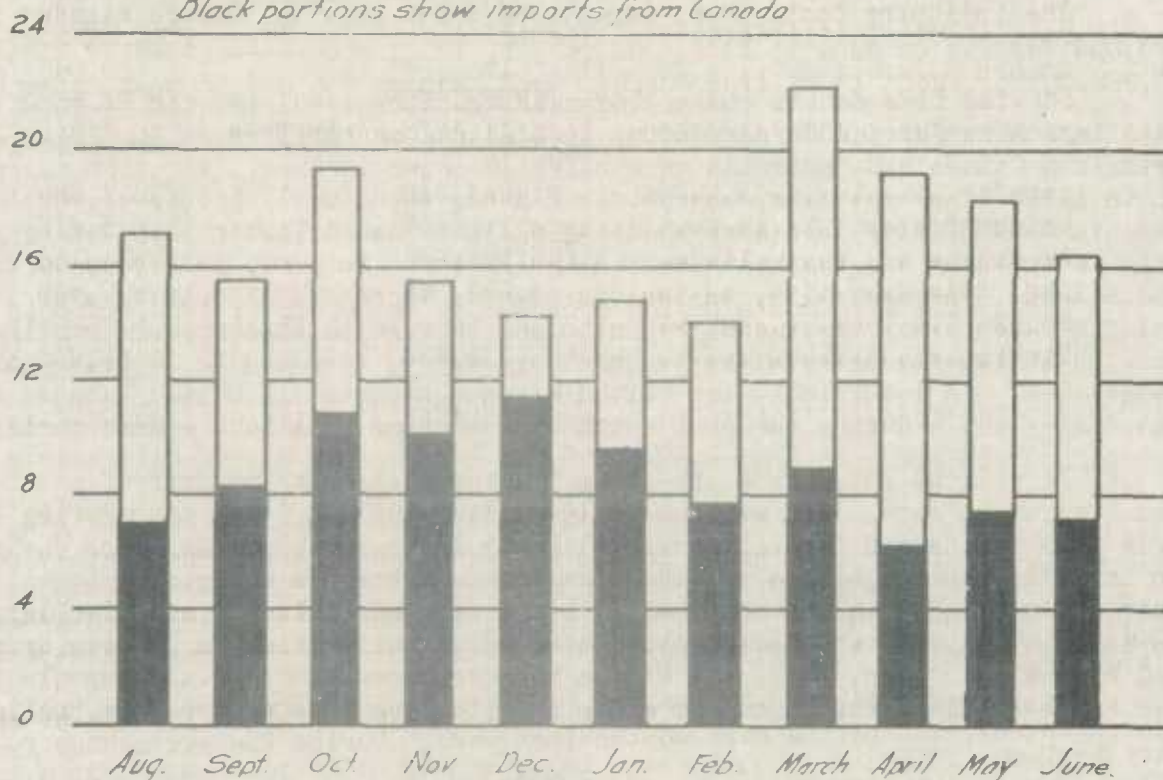
Crops are now being harvested in southern Europe and northern European crops will be ready for harvest shortly. Information in regard to European crops is rather uncertain at the present time. It would appear, however, that Italy, Spain, France and Germany will harvest somewhat smaller crops in 1933 than last year. It is very difficult, however, to place confidence in early estimates of European crops for the reason that the conditions under which harvest takes place determines the quality and to some extent the yield of the crop. Wet harvest weather is always a danger to European wheat crops. It is possible that reductions in production indicated in northern European countries may be offset by increased production in the Danubian area.



## Imports of Wheat into the United Kingdom

August to June 1932-1933  
Black portions show imports from Canada

Million  
Bushels



### The United Kingdom

Imports of wheat into the United Kingdom during the month of June were slightly lower than during the preceding month and the corresponding month last year. Imports during June amounted to 16,493,593 bushels compared with 18,780,751 bushels during May and 18,054,675 bushels during June, 1932. The following table shows imports of wheat into the United Kingdom for the nine-month period from August, 1932 to April, 1933 and for the months of May and June 1933:

From -	August-April	May	June	August-June
	(bushels)			
Canada	81,255,073	7,567,583	7,224,513	96,047,474
United States	2,191,843	37	37	2,191,917
Argentine	19,609,252	4,710,265	5,039,637	29,359,154
Australia	35,428,294	6,244,054	4,093,543	45,765,896
Russia	3,960,702	-	-	3,960,702
Other	10,883,023	258,812	135,553	11,277,388
<b>Total</b>	<b>153,328,187</b>	<b>18,780,751</b>	<b>16,493,593</b>	<b>188,602,531</b>
<b>Last Year</b>	<b>176,253,047</b>	<b>16,465,447</b>	<b>18,054,675</b>	<b>210,773,169</b>

As shown by the foregoing table, imports of wheat into the United Kingdom during the ten months from August, 1932 to June, 1933, amounted to 189 million bushels compared with 211 million bushels for the same months in 1931-32. Out of total imports of 189 million bushels, Canada has supplied 96 million bushels or 51.0 per cent; Australia has supplied 46 million bushels or 24 per cent; the Argentine has supplied 29 million bushels or 15.0 per cent.

The following table shows imports of wheat into the United Kingdom in June, 1933 and 1932:

	<u>June, 1933</u>	<u>June, 1932</u>
	( Bushels )	
From:		
Canada .....	7,224,818	7,801,588
United States .....	37	1,335,412
Argentine .....	5,039,637	3,935,186
Australia .....	4,093,548	4,919,846
Russia .....	-	-
Others .....	<u>135,553</u>	<u>62,643</u>
T O T A L .....	<u>16,493,593</u>	<u>18,054,675</u>

It will be noted from the above figures that total imports of wheat into the United Kingdom in June, 1933 were about 1½ million bushels lower than during June, 1932. Imports from Canada and Australia were slightly lower in June, 1933 than during the same month in 1932. The Argentine, on the other hand, increased exports by over 1 million bushels in June this year as compared with the same month last year. The largest difference in imports between the two months compared is shown in imports from the United States. In June, 1932, the United Kingdom imported 1,335,412 bushels from the United States while during the past month imports from this source were negligible.

#### Stocks

Stocks of imported wheat in the United Kingdom decreased slightly during the month of June. On July 1, 1933 stocks amounted to 12,320,000 bushels compared with 13,080,000 bushels on June 1, 1933. On July 1, 1932, stocks of imported wheat amounted to 10,960,000 or about 1½ million bushels less than on the same date this year.

#### Imports

During the five-month period from August to December, 1932, imports of wheat were sharply lower than during the corresponding months in 1931 as shown by the following table:

British imports, August to December, 1931 -	114,657,407 bushels
British imports, August to December, 1932 -	<u>82,387,646 bushels</u>
Difference	<u>32,269,761 bushels</u>

For the five months ending December, 1932 imports amounted to 32 million bushels less than for the corresponding five months of 1931. This situation, of course, was due to the extremely large supplies offered on the British market during the fall months of 1931.

Since the first of the calendar year, however, British imports of wheat have increased in relation to the same months last year. During the six months from January to June, 1933, imports of wheat into the United Kingdom amounted to 106 million bushels compared with 96 million bushels for the corresponding months of 1932.



RUSSIA

In the last issue of the Monthly Review of the Wheat Situation, meteorological data for the principal wheat areas of Russia were published covering the period from May 11th to June 8th. Similar data from June 15th to July 13th is shown in the following tables. These data are provided by the London correspondent of the Dominion Bureau of Statistics.

Week ending	Temperature		Precipitation in inches	Conditions on last day of week	
	Degrees Fahrenheit Min.	Max.		Weather	Ground
June 15th, 1933					
Ukraine	34 to 52	72 to 79 exception 90 (1)	0.1 to 0.5	Cloudy to raining	Dry to wet
Lower Volga	52 to 59	79 to 84	0.3 to 0.7	Cloudy to raining	Mainly dry
Middle Volga	42 to 61	77 to 81	Negligible to 0.4	Mainly clear	Dry to wet
Western Siberia	32 to 37	63 to 82	0.7 to 0.9 exception negligible (2)	Cloudy to overcast	Dry to wet
Caucasus	45 to 50	72 to 79	1.2 to 1.9 exception 0.3 (3)	Cloudy to overcast	Wet
Ural	30 to 39	70 to 75	Negligible to 0.2	Lacking	Mainly dry
Kazakstan	36 to 48	79 to 84	Negligible to 0.3	Cloudy	Dry
Central Black Soil	46 to 54	70 to 81	Up to 0.8	Cloudy to raining	Mainly wet
Exceptions:-	(1) Ukraine - maximum temperature - Loubny. (2) Western Siberia - precipitation - Omsk. (3) Northern Caucasus - precipitation - Novorossiisk.				

June 22nd, 1933.

Ukraine	52 to 61	70 to 90	0.3 to 0.7	Mainly cloudy	Dry to wet (mainly dry)
Lower Volga	54 to 63	77 to 88	Negligible to 0.5	Cloudy to overcast	Dry to wet (mainly dry)
Middle Volga	41 to 52	84 to 90	0.2 to 0.4	Lacking	Wet
Western Siberia	43 to 54	75 to 84	0.1 to 0.6	Cloudy to overcast	Dry to wet
Caucasus	50 to 63	72 to 82	0.3 to 0.7 exception 1.5 and 3.2 (1)	Mainly cloudy	Dry to wet
Ural	34 to 43	61 to 77	Up to 0.8		Lacking
Kazakstan	50 to 57	86 to 91 exception 104 (2)	nil to 0.3	Cloudy to overcast	Dry
Central Black Soil	48 to 54 exception 30 (3)	70 to 90	0.3 to 1.5 (see below) (4)	Cloudy to overcast	Dry to wet (mainly wet)
Exceptions:-	(1) Northern Caucasus - precipitation - Salysk (1.5) Rostov (3.2). (2) Kazakstan - maximum temperature - Erges (104). (3) Central Black Soil - temperature minimum - Kursk (30). (4) Central Black Soil - precipitation - Skouratova (0.3) Zemetchino and Kozlov (0.5) Vogouchar (1.0) Kursk (1.1) Voronezh (1.5)				

Week ending	Temperature		Precipitation in inches	Conditions on last day of week	
	Degrees Fahrenheit Min.	Max.		Weather	Ground
<u>June 29th, 1933</u>					
Ukraine	50 to 57	77 to 84	0.6 to 1.3	Clear to cloudy	Mainly wet
Lower Volga	48 to 61	79 to 90	0.5 to 1.4	Drizzling to raining	Wet
Middle Volga	50 to 52	82 to 90	Lacking	Clear to overcast	Dry to wet
Western Siberia	36 to 43	66 to 73	0.2 to 0.8	Clear to cloudy	Dry
Caucasus	52 to 63	77 to 86	up to 1.0	Cloudy	Wet
Ural			Lacking		
Kazakstan	48 to 57	81 to 97	.0 to .5	Cloudy to overcast	Dry to wet
Central Black Soil	43 to 52	73 to 88	1.1 to 1.6	Cloudy	Wet
<u>July 6th, 1933</u>					
Ukraine	52 to 57	70 to 81	.0 to 1.0	-	Wet
Lower Volga	55 to 61	77 to 86	0.3 to 0.8	Clear to overcast	Wet
Middle Volga			Lacking		
Western Siberia	48 to 50	77 to 99	Up to 0.6	-	Dry
Caucasus	46 to 55	77 to 82	0.5 to 2.4	Clear to cloudy	Dry to wet
Ural	55 to 64	90 to 93	Up to 0.6	-	Lacking
Kazakstan	50 to 64	86 to 102	.0 to 0.6	Cloudy to overcast	Mainly dry
Central Black Soil	50 to 55	75 to 81	0.3 to 0.9	Clear to overcast	Mainly wet
<u>July 13th, 1933</u>					
Ukraine	48 to 59	72 to 95	.5 to 1.9	Clear to overcast	Dry to wet
Lower Volga	34 to 64	84 to 100	.0 to .6	Clear to overcast	Dry
Middle Volga	46 to 50	84 to 93		-	Dry
Western Siberia	41 to 54	68 to 82	.0 to .5	-	Wet
Caucasus	48 to 57	77 to 84	.7 to 1.6	Clear to overcast	Dry to wet
Ural			No reports		
Kazakstan	52 to 61	95 to 97	.0 to .6	Cloudy to raining	Dry
Central Black Soil	46 to 54	79 to 97	.8 to 1.2	Clear to cloudy	Dry to wet



International Trade

The following table shows world shipments of wheat and wheat flour for the first fifty weeks of 1932-33 along with comparative figures for the corresponding period last year. (Broomhall's figures).

		North America	Argentine	Australia	Russia	Other	Total
		(Thousand Bushels)					
August	3	4,472	456	2,328	-	520	7,776
	15	4,880	672	1,104	-	624	7,280
	22	4,352	856	526	-	408	6,152
September	29	4,944	1,144	920	144	308	7,960
	5	7,696	584	920	704	1,056	10,960
	12	3,168	720	528	504	1,272	6,192
October	19	5,608	632	1,744	2,080	824	10,888
	26	7,872	1,240	2,552	952	1,584	14,200
	3	7,984	768	1,408	1,912	1,016	13,088
	10	10,200	520	2,320	1,000	832	14,872
	17	7,288	488	2,104	576	1,080	11,536
November	24	9,616	1,403	1,064	208	672	12,864
	31	6,760	560	1,424	280	920	9,944
	7	8,544	568	2,776	1,536	928	14,352
	14	9,272	976	1,760	936	1,184	14,128
	21	6,984	832	1,304	856	832	10,808
December	28	8,736	1,032	1,968	592	280	12,608
	5	12,904	808	1,856	464	480	16,512
	12	7,200	872	888	952	360	10,272
	19	6,464	1,312	2,696	504	400	11,376
January	26	5,280	2,160	2,744	736	488	11,408
	1	4,592	1,512	2,584	256	464	9,768
	8	3,896	1,944	4,368	552	288	11,048
	15	6,760	2,384	6,456	512	392	16,504
	22	5,224	4,280	6,392	-	360	16,256
February	29	4,320	3,616	5,088	128	792	13,944
	5	4,680	3,448	5,200	72	544	13,944
	12	3,064	4,440	7,160	328	240	15,232
	19	5,496	5,184	6,584	-	400	17,664
March	26	3,528	4,320	7,888	56	272	16,064
	5	5,168	3,360	6,624	-	312	15,464
	12	5,856	4,552	7,568	368	184	18,528
April	19	3,416	4,280	4,528	64	240	12,528
	26	2,984	4,176	5,648	40	192	13,040
	2	4,792	2,672	3,880	-	208	11,552
	9	2,608	4,672	2,424	-	208	9,912
	16	3,584	2,792	2,712	96	240	9,424
May	23	2,632	3,144	4,136	-	224	10,136
	30	5,728	4,792	1,920	-	176	12,616
	7	4,984	3,368	3,968	-	264	12,584
	14	4,376	4,080	3,896	-	280	12,632
	21	6,704	2,968	2,032	-	264	11,968
June	28	6,288	3,224	2,184	-	200	11,896
	4	5,401	2,579	1,922	-	160	10,062
	11	5,076	3,195	1,335	-	160	9,766
	18	5,204	2,061	1,554	-	160	8,979
July	25	4,371	4,410	994	-	480	10,255
	2	3,859	2,149	1,715	-	240	7,963
	9	4,317	3,922	1,478	-	240	9,957
	16	3,083	3,414	3,444	-	320	10,261
T O T A L		282,575	119,442	150,626	17,408	25,072	595,123
Last Year		318,907	137,611	149,965	70,726	74,080	751,289

From August 1, 1932, to July 16, 1933, world shipments of wheat and wheatflour amounted to 595 million bushels as compared with 751 million bushels for the same period in 1931-32. Australian shipments compare favourably with last year while all other exporting areas show reduced exports. In spite of the decline in North American shipments Canada has increased exports substantially during 1932-33 as compared with the previous crop year.

Origin of Shipments.

The following table shows total world shipments of wheat by countries of origin during the first fifty weeks of the present crop year in percentage of last year: -

North America	Argentine	Australia	Russia	Other	Total
		(per cent)			
89	87	101	25	34	79

The foregoing table shows that while world shipments during the first fifty weeks of 1932-33 have declined 21 per cent compared with the same weeks in 1931-32, North American shipments have decreased by 11 per cent compared with last year.

Russian shipments from August 1 to July 16 amounted to only 25 per cent of shipments from this source during the same period last year.

The following table shows the origin of world wheat shipments in percentage of total shipments by countries of origin during the first fifty weeks of 1931-32 and 1932-33.

	1931-32 (per cent)	1932-33 (per cent)
North America .....	42	47
Argentine .....	18	20
Australia .....	21	26
Russia .....	9	3
Other Countries .....	10	4
<b>TOTAL .....</b>	<b>100</b>	<b>100</b>

The above table shows that North America has contributed 47 per cent of world shipments during the first fifty weeks of the present crop year as compared with 41 per cent during the corresponding weeks last year. In 1931-32 Russia received 9 per cent of world shipments while during the present crop year Russia has only accounted for 3 per cent. In 1931-32 the Argentine accounted for 18 per cent of world shipments as compared with 20 per cent during 1932-33. During the present crop year Australia has contributed 26 per cent of shipments as compared with 21 per cent during the same period in 1931-32.

Weekly Average Shipments.

The following table shows weekly average shipments of wheat for the first fifty weeks of 1932-33 along with comparative figures for 1931-32 and 1930-31:

	North America	Argentine	Australia	Russia	Other	Total
			(Million Bushels)			
1930-31 .....	6.9	2.4	3.0	1.8	1.2	15.3
1931-32 .....	6.3	2.8	3.0	1.4	1.5	15.0
1932-33 .....	5.7	2.4	3.0	.3	.5	11.9



As shown by the foregoing table, world shipments have averaged 11.9 million bushels for the first fifty weeks of 1932-33 compared with 15.0 and 15.3 million bushels for the corresponding weeks of 1931-32 and 1930-31 respectively. North American shipments have averaged 5.7 million bushels per week this year as compared with 6.3 and 6.9 million bushels for the corresponding period in 1931-32 and 1930-31.

Position of Import Requirements Estimate.

Mr. Broomhall estimates world requirements at 664 million bushels for 1932-33. European requirements are estimated at 480 million bushels while Ex-European requirements are estimated at 184 million bushels. The position of this estimate on July 16, 1933, is shown in the following table.

<u>Import Requirements.</u>	<u>Actual Shipments.</u>	<u>Balance to be Shipped.</u>
Aug. 1, 1932 to July 31, 1933 (52 Weeks)	Aug. 1, 1932 to July 16, 1933 (50 Weeks)	July 16, 1933 to July 31, 1933 (2 Weeks)
664 million bushels	595 million bushels	69 million bushels
or	or	
12.8 million bushels weekly	11.9 million bushels weekly	

It will be seen from the foregoing table that world shipments to date have averaged 11.9 million bushels per week whereas average shipments of 12.8 million bushels during 1932-33 are required to fulfil Mr. Broomhall's estimate. It appears, therefore, that Mr. Broomhall's second estimate of import requirements was considerably too high.

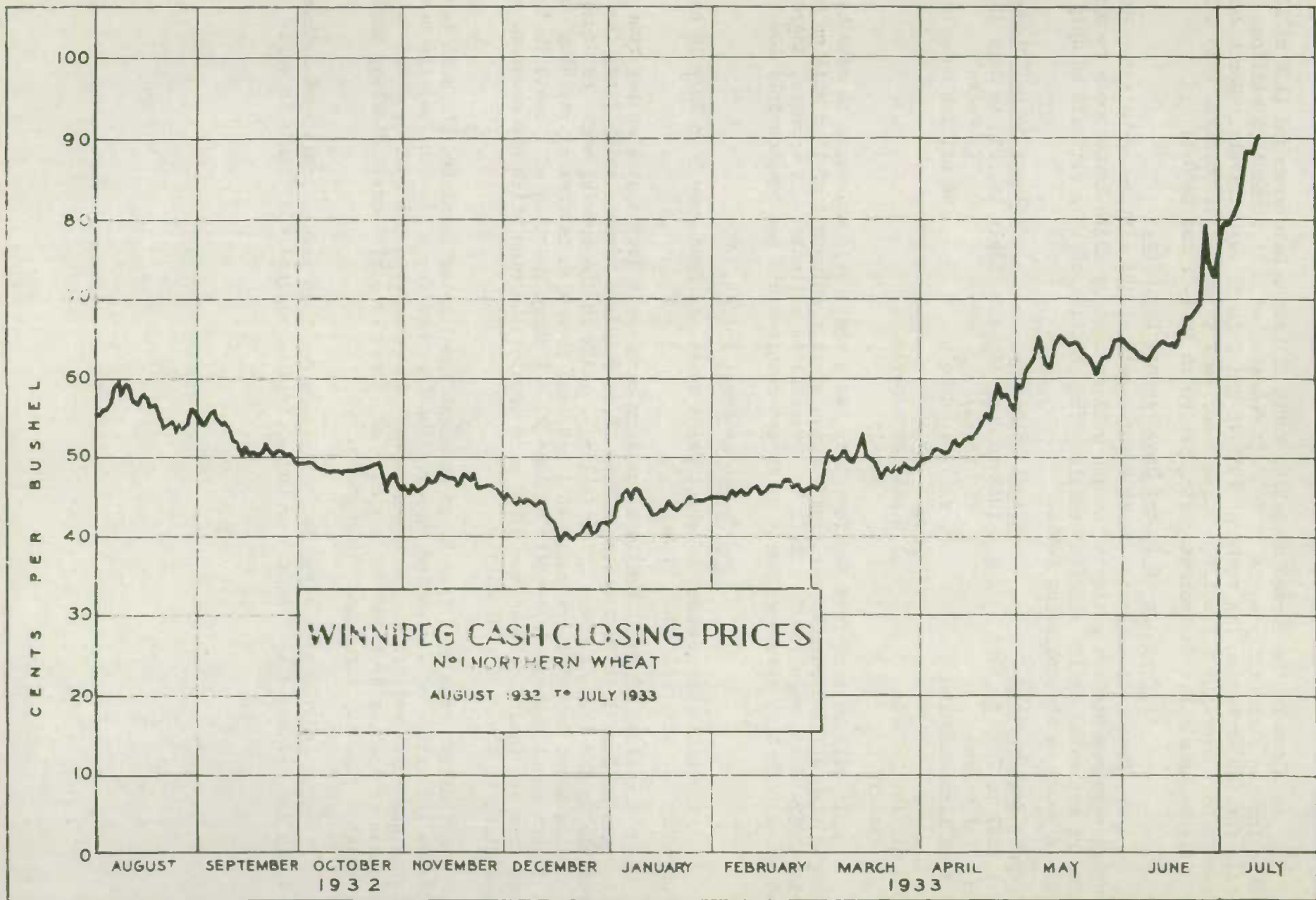
The Course of Wheat Prices.

The following summary of wheat price movements from June 1 to July 15 has been prepared by the Internal Trade Branch.

The price of No. 1 Manitoba Northern cash wheat quoted at Winnipeg rose from 64.2 cents on June 1 to 92.5 cents on July 15, a relative advance which finds few parallels in the last decade. After falling 2 cents in the opening week of June, quotations began to mount gradually at first, and then with increasing rapidity until No. 1 cash wheat reached 79.1 cents on June 27. A sharp reaction of 7 cents in the next three days was followed by a second and more precipitous rise which had shown no sign of terminating by the middle of July.

Bullish crop news from North American wheat areas furnished the main tangible evidence indicative of a stronger supply situation, and for a time in June the need for rain in Australia was acute. European demand for wheat was not active, owing to the imminence of the new crop and the rigidity of import restrictions. Sterling exchange appreciated steadily throughout this period.

Cash closing prices for No. 1 Manitoba Northern wheat, basis Port Arthur and Fort William, averaged 66.7 cents per bushel in June against 63.3 cents in May.





Monthly Average Winnipeg Cash Price - No. 1 Northern Wheat - Crop Years 1926-27 to 1932-33.  
(Dollars per bushel)

	1926-27	1927-28	1928-29	1929-30	1930-31	1931-32	1932-33
August .....	1.51.0	1.59.9	1.18.8	1.58.0	.92.5	.55.1	.56.3
September .....	1.43.8	1.45.1	1.17.0	1.49.5	.78.1	.53.6	.51.9
October .....	1.43.5	1.44.1	1.23.7	1.41.4	.72.5	.59.9	.48.2
November .....	1.41.0	1.45.1	1.20.9	1.33.0	.64.4	.67.3	.46.7
December .....	1.33.4	1.40.6	1.17.1	1.37.8	.55.4	.60.6	.42.4
January .....	1.35.7	1.42.8	1.20.9	1.30.5	.53.9	.60.0	.44.2
February .....	1.39.7	1.42.6	1.27.9	1.17.4	.59.3	.63.2	.45.8
March .....	1.42.7	1.48.1	1.27.0	1.06.2	.56.7	.63.1	.49.1
April .....	1.45.1	1.56.3	1.22.8	1.09.8	.59.7	.62.6	.53.6
May .....	1.53.8	1.57.2	1.12.3	1.07.9	.60.6	.62.9	.63.3
June .....	1.61.1	1.42.6	1.18.3	1.03.2	.60.8	.55.1	.66.8
July .....	1.62.1	1.30.9	1.59.9	.95.1	.57.3	.54.7	

Wheat Prices and the General Price Level <sup>1/</sup>

The following table shows the general Index Number of Wholesale Prices in Canada and Great Britain and of No. 1 Northern Wheat (Winnipeg Cash Price, basis in store Port Arthur and Fort William).

	General Index Canada	Board of Trade <sup>2/</sup> (United Kingdom)	Wheat No. 1 Manitoba Northern Fort William and Port Arthur basis
	1926=100	1926=100	1926=100
1929 .....	95.6	92.2	89.8
1930 .....	86.6	80.7	63.0
1931 .....	72.1	70.3	39.3
<u>1932</u>			
January .....	69.4	71.4	40.1
February .....	69.2	71.1	42.3
March .....	69.1	70.6	42.2
April .....	68.4	69.1	41.9
May .....	67.7	68.0	42.1
June .....	66.6	66.2	36.9
July .....	66.6	66.0	36.6
August .....	66.8	67.2	37.7
September .....	66.9	68.9	34.7
October .....	65.0	68.3	32.2
November .....	64.8	68.3	31.2
December .....	64.0	68.3	28.3
<u>1933</u>			
January .....	63.9	67.7	29.6
February .....	63.6	66.8	30.6
March .....	64.4	65.9	32.8
April .....	65.4	65.6	35.9
May .....	66.9	67.0	42.3
June .....	67.6	-	44.7

<sup>1/</sup> Prepared by the Internal Trade Branch.      <sup>2/</sup> Transposed from the base 1913=100.

During the month of June the general index of wholesale prices advanced from 66.9 to 67.6. The index of No. 1 Northern wheat increased from 42.3 to 44.7.

Exchange Fluctuations.

Shifts in exchange markets since June 1 have been the most spectacular witnessed since the fall months of 1931. Sterling rates at Montreal advanced roughly 11 p.c., and were quoted recently slightly above the \$5.00 mark for the first time since August, 1914. Quotations for the United States dollar on the other hand have declined steadily from a premium of 13 p.c. to one of 5 p.c. Instead of occupying a position somewhere midway between New York funds and sterling, as has been the case for the past twenty months, the Canadian dollar is now, therefore, at a moderate discount in terms of both these currencies. The Australian pound continued to parallel the movements of sterling exchange, having risen over 11 p.c. since June 1. The Argentine peso showed independent strength to advance nearly 24 p.c. in the same interval.

Prices for cash wheat quoted in the Winnipeg market reacting to unfavourable crop news as well as to the exchange situation have mounted over 36 p.c. in the past six weeks.

The following table shows recent exchange quotations at Montreal:

Exchange Quotations at Montreal, December 5, 1932, to July 10, 1933.

		United Kingdom Pound 4.8666	United States Dollar 1.000	Australia Pound 4.8666	Argentine Paper Peso .4244
December	5, 1932	3.7654	1.1762	3.0137	.3043
	12	3.7892	1.1612	3.0328	.3004
	19	3.8026	1.1456	3.0435	.2964
	27	3.8011	1.1400	3.0424	.2949
January	3, 1933	3.7706	1.1300	3.0179	.2923
	9	3.7638	1.1243	3.0125	.2909
	16	3.8141	1.1362	3.0527	.2940
	23	3.8718	1.1500	3.0989	.2975
	30	3.9813	1.1725	3.1849	.3033
February	6	4.0790	1.1875	3.2632	.3072
	13	4.1358	1.2025	3.3086	.3111
	20	4.1403	1.2025	3.3121	.3111
	27	4.1041	1.1987	3.2832	.3116
March	7 /	-	-	-	-
	14	4.1343	1.1975	3.3074	.2098
	20	4.1006	1.1925	3.2804	.3085
	27	4.1109	1.2025	3.2887	.3108
April	3	4.1178	1.2018	3.2942	.3100
	10	4.1230	1.2062	3.2983	.3112
	18	4.1379	1.1925	3.3103	.3085
	24	4.3981	1.1350	3.5185	.3285
May	1	4.4250	1.1350	3.540	.3189
	8	4.3043	1.1425	3.6034	.3210
	15	4.5215	1.1425	3.5988	.3483
	22	4.4700	1.1487	3.5760	.3227
	29	4.5100	1.1275	3.6080	.3374
June	5	4.4934	1.1212	3.5947	.3363
	12	4.6050	1.1050	3.6840	.3431
	19	4.6258	1.1150	3.7006	.3456
	26	4.6767	1.1056	3.7413	.3482
July	3	4.8189	1.0762	3.8551	.3524
	10	5.0133	1.0450	4.0107	.3762

/ No quotations available.



THE CANADIAN SITUATION.

1. Statistical Position of Canadian Wheat.

The following table shows the statistical position of wheat in Canada at the end of June, 1933, with comparative figures for 1931-32.

	<u>1931-32</u>	<u>1932-33</u>
	(Bushels)	
Carry-over, July 31 .....	134,078,963	130,948,901
New crop .....	321,325,000(1)	428,514,000(2)
Total Supplies .....	455,403,963	559,462,901
Domestic requirements .....	119,000,000	122,300,000(3)
Available supplies .....	336,403,963	437,162,901
Exports August to June .....	185,400,625	245,713,353
Balance for Export and Carry-over .....	151,003,338	191,449,548(4)

- (1) Revised.
- (2) Third estimate.
- (3) Revised to conform with Crop Report of April 12, 1933.
- (4) This figure will have to be increased by the amount of the underestimation of the 1932 wheat crop.

At the end of June, the balance of Canadian wheat available for export and carry-over amounted to 191 million bushels compared with 151 million bushels at the same date in 1931-32. Allowing for an underestimation of the 1932 crop of about 20 million bushels, Canada had at the end of June a total of about 211 million bushels of wheat available for export and carry-over or about 60 million bushels more wheat than at the same date last year.

11. Primary Movement.

The following table shows primary receipts of wheat in the Prairie Provinces from August 1, 1932, to July 7, 1933;

	(Bushels)
Manitoba .....	37,803,024
Saskatchewan .....	183,682,111
Alberta .....	141,825,012
TOTAL .....	363,310,147

Preliminary figures of farm disposition for 1932-33 show an estimated disappearance of 61 million bushels for the Prairie Provinces. Deducting this amount from the January estimate of 408 million bushels, there remains a balance of 347 million bushels available for delivery, assuming no change in farm stocks at the end of the crop year. It is apparent, therefore, that on the basis of actual deliveries from August 1, 1932, to July 7, 1933, that the 1932 crop of the Prairie Provinces was underestimated by some 20 million bushels.

111. Visible Supply.

On July 7, 1933, stocks of Canadian wheat in all positions amounted to 201 million bushels as compared with 136 million bushels on the same date last year. The following table shows the distribution of wheat stocks in Canada and the United States for the week ending July 7, 1933 and 1932.

	<u>July 7, 1933</u> (Bushels)	<u>July 7, 1932</u> (Bushels)
Country Elevators - Manitoba .....	5,440,652	2,581,522
Saskatchewan .....	42,129,103	18,960,672
Alberta .....	30,502,479	15,882,663
TOTAL .....	<u>78,072,234</u>	<u>37,424,857</u>
Interior Private and Mill Elevators .....	6,450,546	6,288,133
Interior Public and Semi-Public Terminals .....	2,006,487	106,430
Vancouver and New Westminster .....	8,124,071	10,181,465
Victoria Elevator .....	172	337,349
Prince Rupert Elevator .....	3,048	837,533
Churchill .....	2,430,283	2,274,422
Fort William and Port Arthur Elevators .....	60,823,683	53,544,853
In transit Lakes .....	4,093,383	4,980,821
Eastern Elevators - Lake Ports .....	20,729,630	7,199,001
Eastern Elevators - Seaboard Ports .....	13,386,828	7,572,104
U. S. Lake Ports .....	4,054,706	2,480,000
U. S. Atlantic Seaboard Ports .....	1,076,509	2,837,000
TOTAL .....	<u>201,251,580</u>	<u>136,063,968</u>

The above table shows greatly increased stocks of wheat in country elevators as compared with a year ago. Increases are also shown in stocks in store at Fort William and Port Arthur and eastern points.

IV. Development of the 1933 Crop.

On July 11, 1933, the Dominion Bureau of Statistics issued a bulletin giving the numerical condition of field crops in Canada at the end of June. The following table shows the condition figures for the Prairie Provinces for June 30, and May 31, 1933, and June 30, 1932, (in per cent of long-term average );

	<u>June 30, 1933</u>	<u>May 31, 1933</u>	<u>June 30, 1932</u>
Manitoba .....	85	99	96
Saskatchewan .....	74	99	96
Alberta .....	79	98	105

A sharp and fairly general decline in wheat prospects featured the month of June, 1933. Weighted by intended acreages, this decline amounted to over 23 per cent. Approximately  $21\frac{1}{4}$  million acres of wheat declined in condition while the remaining  $3\frac{3}{4}$  million acres showed no change or slightly improved prospects.

In Manitoba, wheat deteriorated in every crop district except the relatively unimportant Crop Districts 4, 11 and 13, containing only 162,000 acres.



In Saskatchewan, excepting Crop Districts 5 and 8 which were unchanged, there were general recessions in the condition of spring wheat. Crop District 1 fell 13 points, Crop District 2 - 9 points, Crop District 3 - 38 points, Crop District 4 - 42 points, Crop District 6 - 30 points and Crop District 7 - 47 points. The main area of diminished prospects lies roughly west of a line drawn north and south through Moose Jaw.

About 6.2 of Alberta's 7.7 million acres declined in condition during the month. The decline was especially severe in Crop Districts 1 - 6 (in the south and centre) containing well over one-half of the provincial wheat acreage. Crop District 3, for example, declined from 103 to 49 and Crop District 5 from 100 to 46. Little change was evident in Crop Districts 9 - 17, where rain was more plentiful and the heat less intense.

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Growing conditions during the month of June, 1933, presented a distinct contrast with those of June, 1932. The month of June, 1932, was a period of decided improvement in the condition of the spring wheat crop. Considering both condition and acreage, the improvement amounted to about 72 per cent. As mentioned above, the decline in June of this year amounted to over 23 per cent. Comparing condition figures at the end of June in 1932 and 1933, with due regard for reduced acreages this year, 1933 prospects would appear to be nearly 27 per cent lower.

On July 11, 1933, the Dominion Bureau of Statistics issued its seventh telegraphic crop report dealing with conditions in the Prairie Provinces. The report summarized crop development in the West as follows: -

"Rains of the past week were heaviest in southern Manitoba, southern and eastern Saskatchewan and central and northern Alberta. The drought area in western Saskatchewan and southern Alberta persists. Most of the wheat is headed in Manitoba and Saskatchewan and in the early districts of Alberta. Grasshoppers are migrating and although poisoning is now impractical, damage has not been serious during the week. Hail damage was very limited.

"The weather in Manitoba during the week was mostly hot, with scattered showers. A general rain would improve feed prospects. Southern crops are very spotty while further north, good harvests are forecasted.

"Crop conditions are also extremely variable in Saskatchewan. The drought area is situated further west and north-west this year, thus it includes less of the heavy wheat areas. The Regina-Weyburn district has received more rainfall and has better prospects than the districts further east and west. Serious damage by winged grasshoppers has been caused east of Estevan and in the Assiniboia-Lafleche district. Little relief from the prevailing drought in the Swift Current and Scott districts was provided.

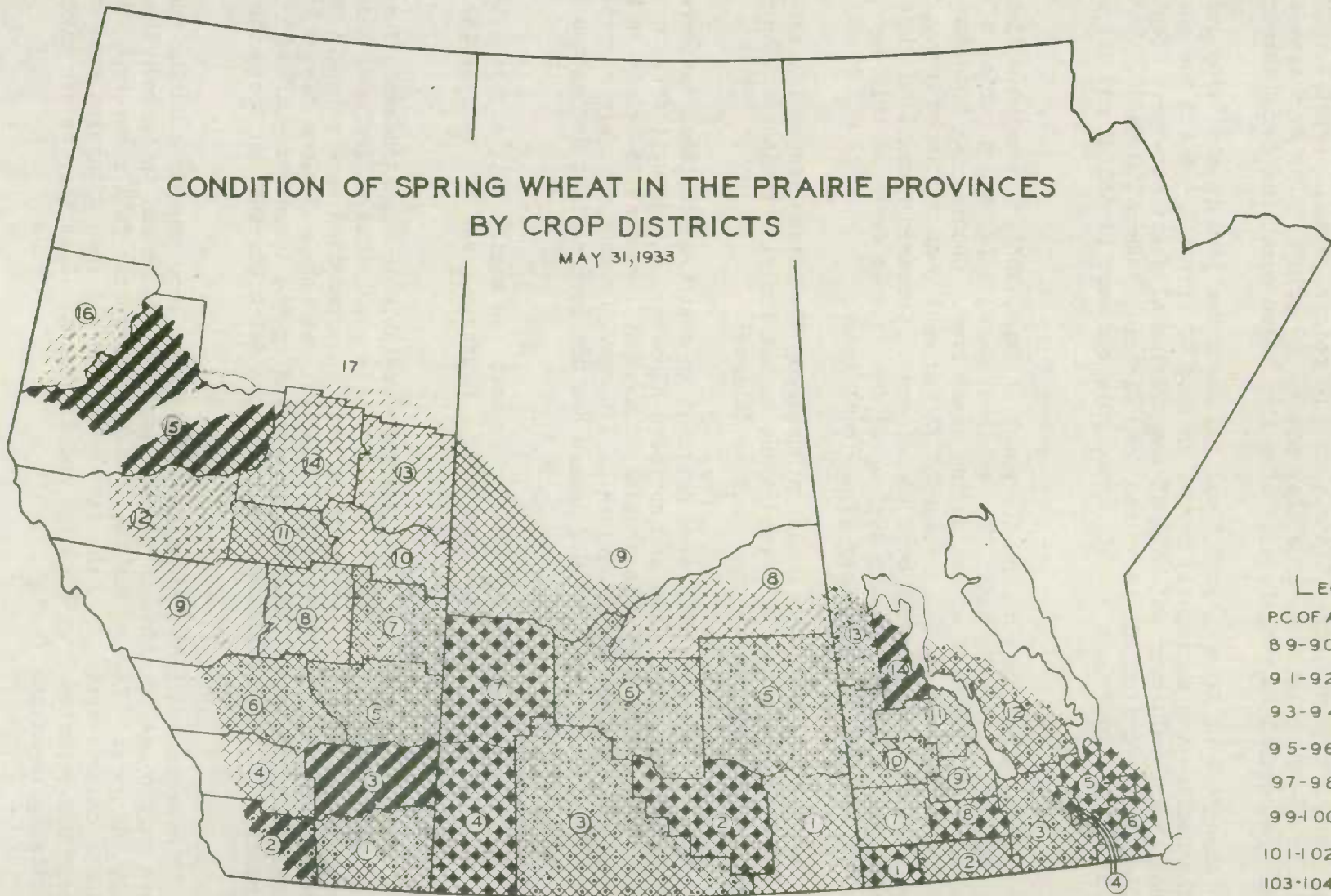
"There was a slight improvement in Alberta crop prospects during the past week. Rains were sufficient to maintain conditions in the south and to improve the crops in the centre and north. Damage was too extensive to permit full recovery of wheat in southern and central areas, but the late crops and the feed situation are benefited. Hail damage was reported from Edmonton and Athabasca. Grasshoppers are migrating, but are not harming the crops."

#### Maps.

On pages 20 and 21 are shown maps of the three Prairie Provinces illustrating the condition of the wheat crop by crop districts on May 31 and June 30, 1933.

# CONDITION OF SPRING WHEAT IN THE PRAIRIE PROVINCES BY CROP DISTRICTS

MAY 31, 1933



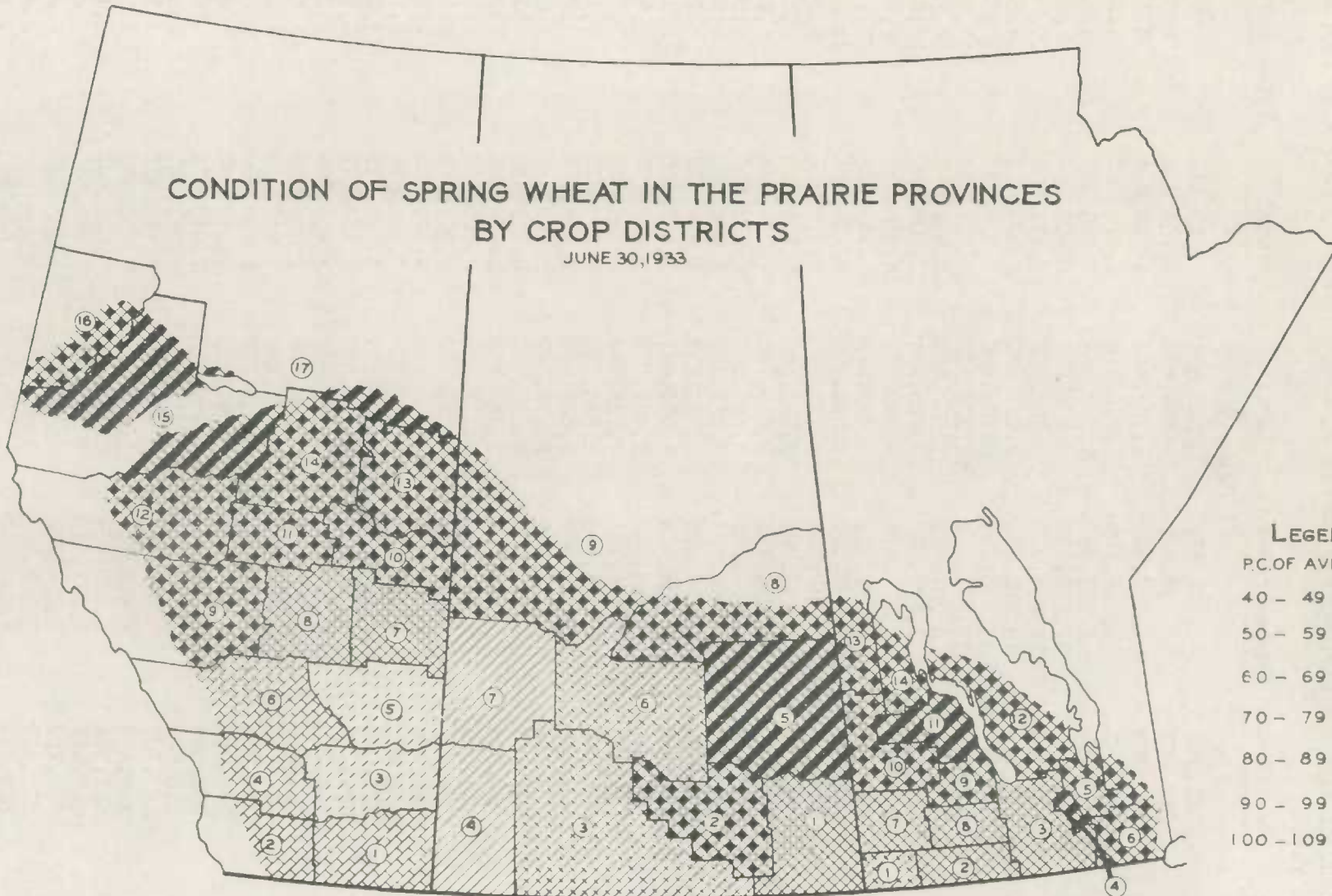
## LEGEND

P.C. OF AVERAGE

- 89-90
- 91-92
- 93-94
- 95-96
- 97-98
- 99-100
- 101-102
- 103-104
- 105-106



CONDITION OF SPRING WHEAT IN THE PRAIRIE PROVINCES  
 BY CROP DISTRICTS  
 JUNE 30, 1933



**LEGEND**

P.C. OF AVERAGE

40 - 49	Diagonal lines (top-left to bottom-right)
50 - 59	Diagonal lines (bottom-left to top-right)
60 - 69	Diagonal lines (top-left to bottom-right)
70 - 79	Diagonal lines (bottom-left to top-right)
80 - 89	Diagonal lines (top-left to bottom-right)
90 - 99	Diagonal lines (bottom-left to top-right)
100 - 109	Diagonal lines (top-left to bottom-right)

PRIMARY RECEIPTS

The following table shows the combined deliveries of wheat at country elevators and platform loadings for the period from August 1, 1932 to July 7, 1933 with comparative totals for last year:-

<u>Week ending</u>	<u>Manitoba</u>	<u>Saskatchewan</u>	<u>Alberta</u>	<u>Total</u>	<u>Total last Year</u>
	( Bushels )				
August 7	31,838	131,812	356,836	520,486	625,157
14	226,230	93,826	836,854	1,156,910	1,264,759
21	1,877,062	1,464,553	1,166,429	4,528,044	2,713,947
29	3,142,401	2,295,106	1,036,718	6,474,225	4,376,382
September 2	2,863,647	2,751,965	1,394,526	7,010,138	9,324,039
9	3,989,634	12,243,580	6,176,366	22,409,580	16,490,597
16	4,157,808	23,864,251	9,465,168	37,487,227	12,737,355
23	5,444,139	19,618,134	9,530,550	34,592,823	4,809,416
30	1,547,298	14,038,158	8,488,588	24,074,044	10,659,371
October 7	335,118	14,882,284	11,124,133	26,341,535	17,160,462
14	1,563,033	9,607,818	6,583,661	17,754,512	18,188,510
21	506,523	9,777,022	6,725,041	17,008,586	19,336,715
28	546,618	8,261,878	6,840,072	15,648,568	16,003,775
November 4	234,713	5,269,085	5,444,541	10,948,339	13,997,615
11	439,000	4,525,251	4,592,990	9,108,631	12,851,594
18	390,655	4,677,776	4,251,514	9,319,945	9,591,016
25	763,915	3,146,797	3,581,068	7,491,780	5,231,366
December 2	319,081	2,914,751	4,038,762	7,272,594	5,959,245
9	653,492	2,626,591	3,353,267	6,633,350	4,964,838
16	238,592	1,361,471	2,227,957	3,848,020	4,973,397
23	133,635	1,142,875	2,098,112	3,374,622	3,398,009
30	164,414	848,013	1,040,441	2,052,868	2,101,691
January 6	88,193	910,863	1,484,078	2,483,134	2,817,700
13	95,003	760,131	1,739,344	2,594,478	1,779,516
20	72,892	614,060	1,694,621	2,381,573	2,163,829
27	158,435	916,835	1,337,093	2,412,363	3,435,729
February 3	121,094	1,243,887	2,074,077	3,439,058	2,040,819
10	164,483	672,906	1,272,541	2,109,930	2,942,355
17	85,399	641,714	1,168,965	1,896,078	2,763,170
24	153,963	1,558,812	2,107,573	3,820,348	3,527,350
March 3	422,372	1,543,229	2,021,571	3,987,172	3,416,822
10	437,065	1,649,852	2,103,605	4,190,522	2,697,991
17	453,803	2,101,812	2,676,255	5,231,870	3,765,282
24	521,606	2,457,531	2,179,891	5,159,028	3,072,438
31	390,734	1,928,026	1,785,837	4,104,597	1,521,543
April 7	165,412	1,229,363	1,161,593	2,556,368	1,588,204
14	134,445	1,022,643	885,906	2,042,994	1,796,332
21	147,850	1,392,511	1,107,583	2,647,944	1,514,596
28	296,310	1,403,658	1,049,632	2,749,600	750,871
May 5	194,224	941,096	992,272	2,127,592	627,540
12	306,383	1,198,035	938,756	2,443,174	855,594
19	545,344	1,025,841	710,742	2,281,927	1,637,584
26	127,508	888,507	735,898	1,751,913	2,164,812
June 2	399,677	1,419,806	1,876,995	3,696,478	4,377,369
9	463,393	2,420,634	2,127,495	5,011,522	5,154,732
16	686,455	2,581,413	2,006,812	5,274,680	4,236,478
23	715,797	2,072,322	1,777,538	4,565,657	1,914,278
30	367,419	1,853,835	1,255,451	3,476,705	3,461,457
July 7	527,749	1,342,769	1,220,705	3,091,223	1,827,442
<b>T O T A L</b>	<b>37,803,024</b>	<b>183,682,111</b>	<b>141,825,012</b>	<b>363,310,147</b>	<b>264,311,089</b>



## Export Clearances

The following table shows export clearances of wheat (not including flour) from various ports, by weeks, August 1, 1932 to July 13, 1933 (in bushels).

Week ending	Montreal	Quebec	Sorel	West Saint John and Saint John	Halifax	Churchill	Vancouver	Victoria	United States Ports	Total
Aug -Nov	40,144,048	372,455	9,274,861	-	-	2,736,030	30,854,196	-	8,361,000	92,735,031 x
Dec	2 3,514,217	346,400	1,521,737	-	-	-	3,132,614	281,493	538,000	9,234,461
	9 1,506,929	59,049	276,667	733,886	-	-	3,755,210	-	621,000	7,092,741
	16 -	-	-	408,000	72,000	-	2,067,163	-	504,000	3,051,163
	23 160	-	-	655,952	-	-	3,809,913	-	304,000	4,770,025
	30 353	-	-	363,879	-	-	1,475,213	-	1,749,000	3,538,445
Jan.	7 160	-	-	360,000	-	-	2,168,601	-	448,000	2,976,761
	13 -	-	-	825,048	-	-	4,018,411	-	777,000	5,620,459
	20 200	-	-	201,809	-	-	1,674,823	-	699,000	2,575,832
	27 353	-	-	519,200	32,000	-	1,782,119	-	601,000	2,934,672
Feb	3 160	-	-	323,836	111,748	-	2,576,563	-	940,000	3,952,307
	10 -	-	-	267,967	154,744	-	2,623,120	-	103,000	3,148,831
	17 160	-	-	233,480	-	-	3,529,591	-	820,000	4,583,231
	24 353	-	-	364,929	380,315	-	1,225,744	289,666	808,000	3,069,007
March	3 160	-	-	420,054	55,571	-	1,779,084	-	1,238,000	3,492,869
	9 -	-	-	596,263	24,942	-	2,019,272	280,934	183,000	3,104,411
	17 160	-	-	317,015	143,811	-	1,960,245	-	434,000	2,855,231
	24 353	-	-	144,053	105,421	-	2,370,553	-	74,000	2,694,380
	31 160	-	-	228,719	-	-	1,766,976	-	673,000	2,668,855
April	7 -	-	-	248,038	232,000	-	1,525,014	-	94,000	2,099,052
	14 160	-	-	62,745	162,000	-	1,426,555	-	494,000	2,135,460
	21 544,842	163,579	-	-	181,349	-	1,109,585	-	445,000	2,444,355
	27 1,630,807	-	1,022,401	-	-	-	1,447,490	-	356,000	4,456,698
May	4 2,075,932	301,786	660,278	-	-	-	1,114,269	-	106,000	4,258,265
	11 1,238,287	973,679	574,422	-	-	-	795,278	-	299,000	3,880,666
	18 1,478,582	621,800	1,064,718	-	-	-	959,052	-	507,000	4,631,152
	25 2,116,215	258,011	264,800	-	-	-	1,350,146	-	682,000	4,671,172
June	1 1,381,668	218,000	574,328	-	-	-	1,039,477	681,031	1,214,000	5,108,504
	8 1,811,565	806,182	222,586	-	-	-	1,121,415	-	395,000	4,655,415x
	15 1,829,483	-	552,811	-	-	-	826,711	-	330,000	3,539,005
	22 1,297,526	540,471	437,402	-	-	-	979,084	-	310,000	3,564,483
	29 1,180,650	284,669	192,000	-	-	-	902,249	150,105	250,000	2,959,673
July	6 1,450,916	136,000	-	-	-	-	531,908	-	400,000	2,578,824
	13 1,149,866	-	-	-	-	-	652,135	-	-	1,802,001xx
T O T A L	64,354,425	5,522,081	16,639,011	6,864,873	1,655,901	2,736,030	90,429,779	1,997,857	25,757,000	216,933,437
Last Year	50,573,915	120,248	6,602,101	2,017,008	45,189	544,769	72,269,457	224,000	30,766,000	163,485,007x

x Includes 677,813,298,667 and 320,320 bushels respectively from Prince Rupert.

xx Clearances from United States ports not received.

Canadian Exports of Wheat and Wheatflour - August to June, 1925-26 to 1932-33.

	<u>1925-26</u>	<u>1926-27</u>	<u>1927-28</u>	<u>1928-29</u>	<u>1929-30</u>	<u>1930-31</u>	<u>1931-32</u>	<u>1932-33</u>
	(Bushels)							
August . . . .	18,417,164	11,608,211	14,508,757	29,218,716	13,050,873	20,461,776	14,258,909	19,776,551
September .	18,851,722	13,330,623	17,118,851	30,926,764	9,625,524	31,121,623	16,840,179	28,607,246
October . . .	46,496,013	34,905,314	23,474,245	48,956,623	23,215,028	33,445,885	21,438,369	42,571,988
November . .	40,286,468	49,624,179	57,977,870	80,633,055	24,866,067	34,783,144	29,596,254	29,897,864
December ..	61,697,530	48,861,083	49,114,129	53,242,306	18,683,198	24,938,920	24,386,870	29,950,147
January . . .	16,423,926	16,053,950	18,646,853	25,031,828	7,257,050	11,374,004	10,965,473	16,494,669
February ..	17,861,418	14,789,951	21,827,274	19,710,217	6,895,468	12,163,082	11,417,172	12,421,350 <sup>24</sup>
March . . . . .	20,593,475	21,024,538	23,793,790	27,564,940	14,655,609	15,418,055	11,787,139	17,021,920
April . . . . .	8,593,537	22,050,203	11,103,075	10,553,753	5,459,684	6,148,295	8,662,544	5,514,956
May . . . . .	22,237,352	32,318,219	34,269,702	31,153,225	16,046,226	31,687,391	17,621,415	24,007,708
June . . . . .	32,424,407	19,673,194	25,181,697	29,794,213	21,679,434	22,989,542	18,426,301	19,448,954
<b>TOTAL . . . .</b>	<b>303,883,012</b>	<b>284,239,465</b>	<b>297,016,243</b>	<b>386,785,640</b>	<b>161,434,161</b>	<b>244,531,717</b>	<b>185,400,625</b>	<b>245,713,353</b>



Exports of Canadian Wheat.

The following tables show exports of wheat and flour during 1932-33 with comparative figures for preceding years: -

	<u>W H E A T</u>			
	<u>1932-33</u>	<u>1931-32</u>	<u>1930-31</u>	<u>1929-30</u>
	(Bushels)			
August	15,289,852	11,909,108	17,639,228	10,156,266
September	26,874,237	14,335,637	27,817,053	7,409,809
October	40,192,415	18,925,303	29,784,275	20,721,853
November	27,301,976	27,452,063	31,217,924	22,444,896
December	27,735,999	22,355,975	22,230,397	15,960,792
January	14,706,801	9,472,346	9,608,852	4,994,054
February	10,922,337	9,898,363	10,296,603	6,732,826
March	14,815,705	9,920,634	12,895,567	11,592,472
April	4,460,214	7,513,289	4,680,769	3,428,406
May	21,464,848	15,543,013	29,521,699	13,466,884
June	16,998,672	15,857,427	20,783,219	18,989,550
July		19,620,224	12,060,817	19,868,298
T O T A L .....		<u>182,803,382</u>	<u>228,536,403</u>	<u>155,766,106</u>

	<u>F L O U R</u>			
	<u>1932-33</u>	<u>1931-32</u>	<u>1930-31</u>	<u>1929-30</u>
	(Barrels)			
August	330,382	522,178	627,233	643,246
September	385,113	556,565	734,349	492,381
October	528,794	558,459	813,691	554,039
November	576,864	476,487	792,271	538,038
December	492,033	451,310	601,894	604,979
January	397,304	331,806	392,256	502,888
February	333,114	337,513	414,773	480,587
March	490,270	414,779	560,553	680,697
April	234,387	255,390	326,117	451,395
May	565,080	461,867	481,265	573,187
June	544,507	570,861	490,294	597,752
July		446,379	466,967	658,834
T O T A L .....		<u>5,383,594</u>	<u>6,701,663</u>	<u>6,778,023</u>

	<u>WHEAT AND WHEATFLOUR</u>			
	<u>1932-33</u>	<u>1931-32</u>	<u>1930-31</u>	<u>1929-30</u>
	(Bushels)			
August	19,776,551	14,258,909	20,461,776	13,050,873
September	28,607,246	16,840,179	31,121,623	9,625,524
October	42,571,988	21,438,369	33,445,884	23,215,028
November	29,897,864	29,596,254	34,783,143	24,866,067
December	29,950,148	24,386,870	24,938,920	18,683,198
January	16,494,669	10,965,473	11,374,004	7,257,050
February	12,421,350	11,417,172	12,163,082	6,895,468
March	17,021,920	11,787,139	15,418,056	14,655,609
April	5,514,956	8,662,544	6,148,296	5,459,684
May	24,007,708	17,621,415	31,687,392	16,046,226
June	19,448,954	18,426,301	22,989,542	21,679,434
July		21,628,930	14,106,169	22,833,051
T O T A L .....		<u>207,029,555</u>	<u>258,267,212</u>	<u>186,267,212</u>

Canadian Trade Commissioners report on the wheat situation as follows:

G E R M A N Y

GRAIN IN FARMERS' HANDS

The Markets Reports Bureau of the German Agricultural Council have published the results of their investigations covering the stocks of grain available in the hands of farmers on May 15th, 1933. The results are expressed in the form of percentages of the final crop estimates, and are given below, together with the percentages for the same date of the previous year:-

<u>Kind of Grain</u>	<u>Percentages of Total Crop in Hands of Farmers</u>	
	<u>May 15th, 1933</u>	<u>May 15th, 1932</u>
Winter wheat .....	12.7	5.9
Summer wheat .....	16.5	9.4
Winter rye .....	13.8	8.4
Winter barley .....	6.4	4.5
Summer barley .....	6.6	7.6
Oats .....	23.3	19.1
Potatoes .....	10.5	8.4

The German Grain Journal has translated these percentages into actual quantities, which the following table shows in bushels:-

<u>Kind of Grain</u>	<u>Total Crop in Hands of Farmers</u> Bushels	
	<u>May 15th, 1933</u>	<u>May 15th, 1932</u>
Winter wheat .....	20,576,136	8,083,482
Summer wheat .....	4,078,484	1,837,155
Winter rye .....	45,273,775	21,652,675
Winter barley .....	1,837,224	918,612
Summer barley .....	7,808,202	8,726,814
Oats .....	101,154,144	76,514,032
Potatoes .....	174,897,156	135,582,039

Wheat stocks in first hand declined by 13,962,378 bushels between April 15th and May 15th, compared with 8,818,344 bushels during the previous month. With wheat stocks in first hand amounting to 20,576,136 bushels on May 15th, compared with 8,083,482 bushels last year, there will be approximately 6,797,474 bushels for each of the three months up to August 15th. Even if the consumption of wheat flour declines further during the summer months and a considerable portion of the milling requirements is covered by supplies from second hand stocks, it must be expected that the new crop year will start with a comparatively small balance from the old crop.



First hand stocks of rye declined by 22,833,730 bushels between April 15th and May 15th, as compared with 21,258,990 bushels during the same period last year. The chief reason for the larger decline of stocks of rye in first hand is the increasing use of rye for feeding purposes on the farms, which is to be expected after the import prohibition of maize, barley and other feeding grain. It is not anticipated, however, that stocks in first and second hand will be entirely used up before the new crop. The estimated balance of first hand stocks to be carried over into the new crop year will not exceed 9,842,125 bushels.

The position of stocks in first hand of oats is the one which is most unfavourable. The decline from April 15th to May 15th amounted to 38,905,440 bushels as compared with 55,116,040 bushels in the previous month. It is possible that the prohibition of the import of feeding grains will gradually lead to the increased consumption of oats, but in any case a very large quantity of oats will again have to be taken over into the new crop year.

The Markets Reports Bureau of the German Agricultural Council have published figures of the stocks available for sale by first hand on May 15th, 1933, which are given below in percentages of the total crops, as compared with those on the same date of the previous year:-

<u>Kind of Grain</u>	<u>Stocks available for Sale</u>	
	<u>May 15th,</u>	<u>May 15th,</u>
	<u>1933</u>	<u>1932</u>
Winter wheat .....	9.7	3.9
Summer wheat .....	13.6	7.4
Winter rye .....	6.0	2.0
Winter barley .....	1.0	0.4
Summer barley .....	1.1	2.5
Oats .....	3.3	2.6
Potatoes .....	1.8	1.2

According to the above the farmers had on May 15th, 1933, the intention of selling 15,652,561 bushels of winter wheat, 3,233,393 bushels of summer wheat, totalling 18,885,954 bushels of wheat, and 19,605,513 bushels of winter rye. This would mean approximately 6,246,327 bushels of wheat monthly up to August 15th, and approximately 7,873,700 bushels of rye monthly up to August 1st. These quantities should not burden the market in spite of the large stocks in second hand.

MILL AND WAREHOUSE STOCKS

The Government Bureau of Statistics give the following figures for their investigation of grain and flour stocks in second hand in mills and warehouses at the end of May, 1933, together with figures for the two previous months:-

	<u>Local and Foreign Product</u>			<u>Foreign Product</u>		
	<u>Duty Paid</u>			<u>Duty Unpaid</u>		
	<u>May</u>	<u>April</u>	<u>March</u>	<u>May</u>	<u>April</u>	<u>March</u>
	Bushels					
Wheat	20,392,421	23,412,703	24,779,547	995,738	485,009	628,307
Rye	18,829,954	21,747,159	22,699,877	1,724,340	1,889,688	1,873,941
Oats	4,564,905	5,569,962	6,620,409	19,453	12,968	45,390
Barley	2,879,849	3,844,391	4,616,025	335,293	390,410	482,271
Wheat flour (Barrels)	1,290,157	1,398,139	1,574,734	1,125	1,125	1,125
Rye flour (Barrels)	674,886	742,375	817,737	-	-	1,125

A greater decrease of grain and flour stocks in second hand took place during May as compared with April. Of the total wheat stocks in second hand at the end of May, amounting to 20,392,421 bushels, 12,455,911 bushels (61 per cent) were stored in the mills, and of the rye stocks in second hand 7,873,700 bushels (42 per cent) were in the mills. The decline in the oat and barley stocks amounted to 18 and 25 per cent respectively. Wheat and rye flour stocks declined by 8 and 10 per cent respectively. Compared with May, 1932 there are larger stocks of bread grain in second hand this year, amounting in the case of wheat to 8,708,115 bushels more, and in the case of rye 10,708,232 bushels. Stocks of oats, barley and flour were not so very much larger.

The above figures include again 95 per cent of all grain and flour stocks in mills and warehouses. The quantities of grain in the feeding stuffs factories and other industrial users (malt factories, corn coffee factories, food products factories, etc.), as well as the quantities en route and the flour stocks of the bakers are not included in these figures.

The quantities of wheat and rye which have up to now been used in this crop year have also been ascertained. It is shown that in the period August, 1932 up to the end of May, 1933 the German mills have used 139,623,780 bushels of wheat and 161,410,850 bushels of rye, of which 124,926,540 bushels of wheat and 141,726,600 bushels of rye were used for baking purposes.

#### GRAIN IMPORTS

The following statement of the Government Bureau of Statistics shows increased imports of grain into Germany for the month of May as compared with the previous month:--

	<u>May</u>	<u>April</u>
	Bushels	
Wheat .....	3,065,440	1,793,100
Rye .....	1,338,608	866,422
Feeding barley .....	79,092	42,394
Other barley .....	772,828	666,453
Oats .....	123,590	223,706
Wheat flour (barrels) .....	2,160	5,669
Rye flour (barrels) .....	281	236

#### FIELD CROP CONDITIONS

The German Grain Journal reports that owing to the cool and wet weather in May field crops in Germany have on the whole developed well. This was particularly noticeable in the case of winter grain which had suffered through the dry and cold weather in April. The condition of the winter crops is now nearly everywhere reported to be satisfactory. The ears have already appeared in the case of winter rye and winter barley, and the grain should soon be in bloom. The condition of the summer grain is on the other hand not so satisfactory, the growth of which was somewhat affected by the cool weather. Growth is also slow in the case of vegetables. On the basis of 2 - good, 3 - average, 4 - poor, the average condition of the crops in the whole of Germany is as follows (comparative figures for last month in brackets):- winter rye 2.7 (2.9); summer rye 2.8; winter wheat 2.6 (2.7); spelt 2.3 (2.5); winter barley 2.9 (2.8); summer barley 2.6; oats 2.8; early potatoes 2.8; late potatoes 2.8; sugar beet 2.9; clover 2.8 (2.8); lucerne 2.9 (2.7); irrigated meadows 2.7 (2.9); other meadows 3.0 (3.0).



A U S T R I A

The German Grain Journal reports that although the crop in Austria may be delayed on account of the continued cool weather, present conditions point to a crop which may possibly be larger than that of 1932. In the case of rye it is definitely expected that a crop will result which will eliminate imports. The quality and quantity of the oat crop should also exceed that of last year. For wheat and barley the reports are also satisfactory.

C Z E C H O S L O V A K I A

The German Grain Journal states that according to a report of the Czechoslovakian Ministry of Agriculture the weather has not improved, so that the desired improvement in the condition of the crops has not taken place. Rye is especially behind in its development. The unfavourable weather has also greatly affected summer wheat, the area of which has been increased by 2.1 per cent compared with last year. On the basis of 2 - above average and 3 - average, the condition of the crops was as follows on June 1st:- winter wheat 2.42; summer wheat 2.69; rye 2.68; barley 2.63; oats 2.86.

E S T O N I A

According to the German Grain Journal it is officially stated in Estonia that the condition of the summer crops on June 15th was not satisfactory. The cold spring and the following dry weather has been most unfavourable to growth. For the same date prospects for the winter grains were better.

L I T H U A N I A

It is stated by the German Grain Journal that the recent rainfalls in Lithuania have greatly improved the crop prospects. It is now expected that the grain crop will be above average, so that an import of grain during the season 1933-34 will be made unnecessary.

P O L A N D

According to statements of the Government Bureau of Statistics in Warsaw the condition of the crops in Poland on the basis of 5 - excellent, 3 - average, 1 - poor was on May 15th as follows. Figures in brackets show the comparative position on May 15th, 1932:- winter wheat 3.4 (2.8); winter rye 3.3 (3.0); winter barley 3.1 (3.0); summer wheat 3.2 (3.1); summer rye 3.0; summer barley 3.1 (3.2); oats 3.0 (3.2). Compared with April the condition of the winter crops has improved. The warm weather and repeated rains were favourable both to the winter and summer crops.

A U S T R A L I A

The Canadian Trade Commissioner for Australia cabled as follows on July 15, 1933:-

"Through adverse reports Canadian and United States crop prospects Australian wheat prices have substantially increased. Prices to growers average two shillings eleven pence to three shillings bushel in Australian currency equivalent to-day to fifty-seven and fifty-nine cents Canadian funds at country stations. F.O.B. steamer quotations average three shillings six pence half penny or sixty-nine cents Canadian. Bulk Australian wheat sold. Total shipped 3,171,500 tons or 118,296,295 bushels of which over fifty-four million bushels went to United Kingdom and Continent and over sixty-four million bushels to non-European countries. In addition 360,000 tons now

committed shipment leaving unsold balance about 500,000 tons of which estimated 200,000 tons will be exported in flour to Java, China, etc., hence probably Australia cannot sell more than 350,000 tons actual wheat before new season arrives. Until recently weather conditions unfavourable but during this week good rains have fallen in all wheat growing states except South Australia hence greatly improved crop prospects. Considered too early to prophecy coming harvest depending on rains September and October but with reduced acreage estimates of from 160 to 180 million bushels have been made. Flour market depressed with few inquiries, many mills only working part time and no indication early improvement. Average F.O.B. steamer price to-day seven pounds ten shillings ton Australian currency in 150 pound sacks equivalent twenty-nine dollars eighty-five cents Canadian funds and in forty-nine pound bags seven pounds seventeen shillings six pence or thirty-one dollars thirty-four cents Canadian. Freights firmer recent charters from West Australia to United Kingdom and Continent. Twenty-three shillings six pence from Eastern States twenty-five shillings and bulk wheat from Sydney twenty-three shillings ton all payable English currency."





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