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CANADA

DEPARTMENT OF TRADE AND COMMERCE

DOMINION BUREAU OF STATISTICS

AGRICULTURAL BRANCH

VOL 3

No. 12

MONTHLY REVIEW

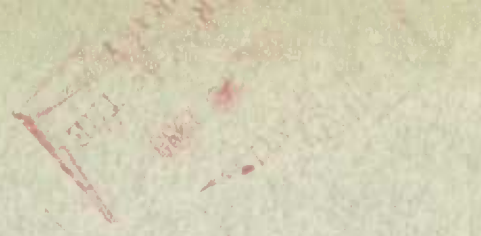
OF THE

WHEAT SITUATION

AUGUST, 1933

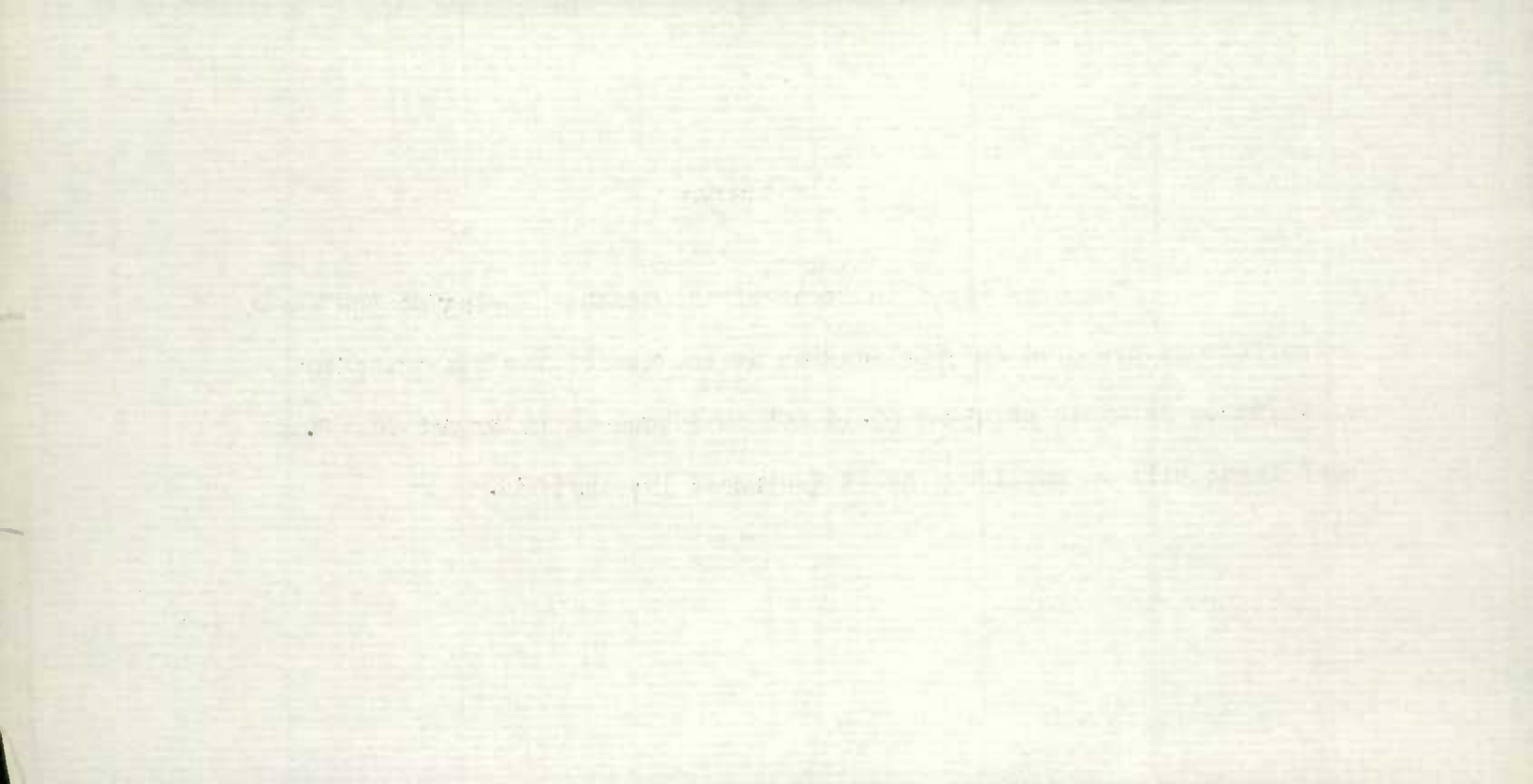
Published by Authority of the HON. H. H. STEVENS, M. P.,
Minister of Trade and Commerce.

OTTAWA
1933



NOTICE

The copy for this issue of the Monthly Review of the Wheat Situation was prepared for publication at the usual time but owing to unavoidable delay in printing could not be issued until August 28. The next issue will be published about September 19, 1933.



DEPARTMENT OF TRADE AND COMMERCE
DOMINION BUREAU OF STATISTICS - CANADA

BUREAU
1933

AGRICULTURAL BRANCH

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The World Wheat Situation

The present world wheat situation is dominated by two major considerations which are acting with opposite effects upon the world's markets. On the one hand there is the fact of greatly reduced cereal production in North America in 1933 due to drought and excessive heat during the growing season over the central areas of the United States and over large areas of the Prairie Provinces. On the other hand there is the prospect that Europe has harvested and will harvest bountiful crops of wheat and that world import requirements will be abnormally low during the present crop year. These two propositions form the basis of the wheat position for 1933-34.

Preliminary estimates have been issued covering the main cereal crops in the United States. Adverse climatic conditions not only reduced 1933 wheat production to the lowest point in years but also reduced production of corn, oats, barley, and rye by millions of bushels. Considering the five leading grains together, 1933 preliminary estimates show a reduction of well over one billion bushels as compared with average production during the five years from 1926 to 1930. If the known (but not quantitatively expressed) reduction in yield in Canada be considered along with the reduced production in the United States, the 1933 growing season stands as one of the most disastrous in the agricultural history of the two countries.

While not all European wheat crops have been estimated and while only early estimates are available for many countries, it now appears likely that Europe will harvest another large crop of wheat which will be supplemented by reserves carried over from 1932-33, notably in France and Germany. This factor along with all the concomitants of world-wide depression will tend to reduce import requirements to a low level. Mr. Broomhall estimates that world import requirements will amount to 552 million bushels during 1933-34 or to about 60 million bushels less than actual shipments during the past crop year when the volume of world trade in wheat was not impressive.

During the past month, the Canadian situation has become more definite with the progress of the crop, the publication of the carry over at July 31 and the issuance of 1933 acreages for the Prairie Provinces. The condition of the spring wheat crop declined greatly during July and was numerically expressed as 57 at the end of July as compared with 77 on June 30 this year and 88 on July 31, 1932. Harvest has been aided by bright, hot weather. This has further reduced the prospective yields of late sown wheat but has minimized the menace of fall frosts.

The acreage figures for the Prairie Provinces released on August 10 corresponded closely with the May 1 'Intentions' and showed a reduction of 1,218,000 acres or 4.6 per cent compared with last year's figures for the three provinces.

Stocks of Canadian wheat held in store in Canada at July 31, 1933 reached the record total of 211,740,188 bushels. The primary, internal and overseas movements of wheat were very slow during the past month but with evidences of improvement.

North American Production

A. The United States

As previously mentioned the crop situation in North America is one of the major factors to be considered in evaluating the present wheat situation. The extent of 1933 production in the United States is fairly well defined at the present time as preliminary estimates have been issued covering the main cereal and feed crops. A discussion of the production situation in the United States during 1933 may be introduced with reference to a general statement contained in the last official crop report issued on August 10, 1933. The report states -

"The wheat and oat crops are each expected to be the smallest in 35 years or more and the forecasts for barley, flaxseed, hay, beans, and potatoes are all below the very low forecasts of a month ago. The condition of pastures on August 1 was the lowest on record for that date. . . . Drought this year has affected a larger area than in 1930, practically the whole of the United States being affected on the first of July, but the area in acute distress is smaller, being limited chiefly to the Panhandle of Texas, Western Oklahoma and Southwestern Kansas and to an area extending from Central South Dakota into Southwestern Minnesota. The drought has been broken in nearly all parts of the Cotton Belt and there has been partial relief in most other sections east of the Great Plains. A large portion of the Great Plains, Corn Belt, and North Atlantic areas, however, lacked adequate moisture during part or all of July. So far as can be told at this time, with early grains not all threshed and late corn dependent on weather conditions for some months ahead, total grain production this year will be 16 percent less than in any of the last ten years and 24 percent less than the average production during that period. The hay crop is expected to be about the same as in the drought years 1930 and 1931 and 12 percent below the average production during the last 10 years. Buckwheat, flaxseed and beans are all very short crops."

Preliminary production figures for the United States indicate clearly that conditions during the present season have seriously affected the yield of all cereals and pasture crops. This point should be carefully considered. If one cereal is a partial failure, the deficit may be made up by using other substitute products. In the United States, however, all cereal crops are below average and substitution becomes difficult. Furthermore the feed situation is complicated by the fact that the hay crop is considerably below average, thereby increasing dependence upon feed grains. The extent of the crop damage in 1933 in the United States may be indicated by reference to the following table showing preliminary estimates of cereals:-

	<u>Average 1926-1930</u>	<u>Estimated 1933</u>
	(bushels)	
Wheat	861,168,000	499,671,000
Corn	2,511,991,000	2,273,019,000
Oats	1,189,693,000	666,745,000
Barley	263,629,000	157,634,000
Rye	41,564,000	23,116,000
TOTAL	<u>4,868,045,000</u>	<u>3,620,185,000</u>

It will be seen from the above table that total production of the five leading grains in 1933 is 1,247,860,000 bushels less than average total production during the five years from 1926 to 1930. These figures indicate the extent to which production has been cut down in 1933.

On the following two pages are set out the production of wheat, corn, oats, barley and rye (preliminary estimates) by states.

PRODUCTION OF CEREALS IN THE UNITED STATES, 1933.

	WHEAT		CORN		OATS		BARLEY		RYE	
	Average 1926-30	Est. 1933	Average 1926-30	Est. 1933	Average 1926-30	Est. 1933	Average 1926-30	Est. 1933	Average 1926-30	Est. 1933
(thousand bushels)										
EASTERN STATES										
Maine	58	110	520	738	4,600	4,500	94	155	-	-
New Hampshire	-	-	568	616	322	228	-	-	-	-
Vermont	-	-	2,613	2,583	1,915	1,647	128	115	-	-
Massachusetts	-	-	1,738	1,634	185	155	-	-	-	-
Rhode Island	-	-	341	369	71	66	-	-	-	-
Connecticut	-	-	2,048	2,040	253	261	-	-	-	-
New York	4,771	4,220	18,934	19,992	27,596	17,004	5,242	2,782	316	210
New Jersey	1,275	1,078	6,944	6,683	1,233	1,118	31	52	515	368
Pennsylvania	18,684	15,621	44,818	48,818	30,109	21,712	716	1,743	1,407	1,593
Ohio	27,311	33,917	116,902	89,910	67,502	26,720	4,119	928	500	575
Indiana	25,946	22,009	146,116	115,236	61,215	30,145	916	384	1,150	980
Michigan	15,208	12,820	35,130	38,902	46,278	21,831	5,389	3,766	2,019	1,407
Delaware	1,998	1,012	3,550	3,675	84	108	-	-	64	52
Maryland	9,690	6,518	14,425	18,048	1,463	1,348	270	702	229	221
Virginia	8,975	7,425	32,873	34,385	2,892	3,154	311	644	437	578
West Virginia	1,604	1,808	11,408	11,934	3,478	2,751	-	-	122	168
North Carolina	3,638	3,714	39,328	40,250	2,832	3,075	276	306	446	420
South Carolina	537	608	20,751	22,330	7,925	6,825	-	-	73	49
Georgia	572	469	39,426	41,140	5,537	5,285	-	-	99	72
Florida	-	-	6,863	5,661	123	88	-	-	-	-
Kentucky	2,742	3,240	64,144	62,077	2,985	1,830	123	210	190	176
Tennessee	3,307	2,804	59,546	59,619	1,993	1,485	256	374	112	104
Alabama	29	27	34,996	41,782	1,631	1,224	-	-	-	-
Mississippi	-	-	30,423	36,301	574	352	-	-	-	-
Louisiana	-	-	17,405	17,371	316	289	-	-	-	-
TOTALS	126,345	117,400	751,810	722,094	273,112	153,201	17,871	12,161	7,673	6,973

PRODUCTION OF CEREALS IN THE UNITED STATES, 1933.

	WHEAT		CORN		OATS		BARLEY		RYE	
	Average 1926-30	Est. 1933	Average 1926-30	Est. 1933	Average 1926-30	Est. 1933	Average 1926-30	Est. 1933	Average 1926-30	Est. 1933
(thousand bushels)										
CENTRAL STATES										
Wisconsin	2,129	1,473	66,399	79,416	88,761	65,208	20,717	17,226	2,480	2,190
Illinois	33,303	25,300	297,334	222,778	134,629	74,906	11,621	4,725	778	612
Minnesota	22,090	13,768	140,822	147,250	138,627	76,228	46,601	29,820	6,318	3,375
Arkansas	199	216	30,159	20,823	2,115	1,648	-	-	-	-
Oklahoma	52,386	28,848	54,305	22,323	22,829	19,692	1,236	747	97	45
Kansas	153,525	56,748	127,412	97,617	29,846	25,476	8,507	1,496	285	128
Nebraska	62,354	29,014	224,658	245,232	67,398	22,260	11,482	8,450	3,049	1,498
South Dakota	36,122	5,609	107,836	40,050	60,005	5,474	30,550	3,600	2,828	880
North Dakota	115,035	56,375	19,228	30,072	41,327	21,528	40,012	19,080	14,848	6,071
Iowa	8,330	3,947	423,875	407,740	216,206	115,496	16,751	8,704	670	403
Missouri	18,242	15,315	150,072	126,610	32,758	27,504	184	168	132	98
Montana	56,447	29,548	1,952	2,712	10,563	6,650	4,888	2,996	873	288
Wyoming	4,305	1,864	2,784	2,409	3,801	2,970	2,207	2,048	309	95
Colorado	20,996	4,709	22,936	19,090	5,595	3,696	9,588	7,905	628	84
New Mexico	2,510	1,166	3,556	3,024	767	760	149	221	-	-
Texas	32,559	12,012	78,426	74,312	36,686	18,882	3,472	1,496	39	13
TOTALS	620,592	285,912	1,751,754	1,541,458	891,913	488,378	207,965	101,106	33,334	15,780
WESTERN STATES										
Arizona	520	1,120	551	630	287	348	303	495	-	-
Utah	5,690	4,275	411	483	1,783	1,683	1,294	1,440	31	22
Idaho	28,511	20,766	1,618	1,800	4,492	4,402	4,205	4,480	46	40
Washington	43,557	41,370	1,222	1,280	7,310	8,413	1,888	2,479	211	81
Oregon	23,013	15,812	2,040	2,010	8,153	8,128	2,121	3,219	261	220
Nevada	386	400	50	40	83	99	262	207	-	-
California	12,515	12,616	2,537	3,224	2,558	2,092	27,719	24,471	-	-
TOTALS	114,192	96,359	8,429	9,467	24,666	25,165	37,792	36,791	549	363
GRAND TOTALS	861,168	499,671	2,511,991	2,273,019	1,189,693	666,745	263,629	157,634	41,564	23,116

Eastern States

In analysing the data on pages 3 and 4, attention is first called to the eastern states. It will be noticed in this group, comprising 25 states, that production of wheat, corn, and rye, while low, is not seriously below normal expectations. Production of oats and barley is very low, however. According to preliminary estimates of 1933 production, the oats crop of this area is estimated at only 153 million bushels compared with average production of 273 million bushels from 1926 to 1930. Apart from a few of the southern states, hay production is below average. These figures indicate the basis of a feed problem of considerable importance in the eastern areas of the United States.

Central States

The full effect of the adverse climatic conditions experienced this season is evidenced by the preliminary estimates of production in the central states. In the 16 states included in this area it will be noted that wheat production in 1933 is estimated at less than one-half average production from 1927 to 1930. Production of oats, barley and rye is relatively small, 1933 production of the latter two grains being less than one-half of average production from 1926 to 1930. Corn is a relatively better crop throughout this area but total production is currently estimated at over 200 million bushels less than average. Production of oats is estimated at over 400 million bushels less than average production from 1926 to 1930. It must be remembered that the central states contain the main cereal producing areas of the United States and the production of grains in this area is of national and international significance.

Western States

The group of 7 states included in the western area presents the nearest approach to normal production in the United States. With wheat production close to average, this area has a surplus which accounts for efforts being made in the direction of disposing of this surplus. Production of grains in this area, however, comprises but a small proportion of total production in the United States.

A study of the data on page 3 and 4 indicates the extent to which nature has cut down grain production in 1933, especially in the great producing areas of the central belt. While decreased wheat production is made up for by large reserves from previous crops, 1933 preliminary production figures reveal a serious feed situation for the coming year especially when production of grain is related to the smaller hay crops produced this year. A reduction of over 1 billion bushels in production of grains in the United States in 1933 is a major consideration in the domestic situation in that country and at the same time has repercussions in the world market the extent of which will be more fully realized as time passes. As a result of the situation described, cereals and especially feed grains will have to be carefully utilized in the United States during the coming twelve months.

Production of Different Types of Wheat

The following table shows preliminary estimates of 1933 production of different classes of wheat in the United States along with comparative figures for the four years from 1929 to 1932:- (million bushels)

	<u>Winter</u>		<u>Spring</u>		<u>White</u>
	<u>Hard Red</u>	<u>Soft Red</u>	<u>Hard Red</u>	<u>Durum</u>	<u>Winter and Spring</u>
1929-32	373	185	141	44	81
1933	163	143	91	18	84

It will be noted from the foregoing figures that the largest reductions in 1933 occurred in the case of hard, red winter wheat; the second largest reduction in the case of hard, red spring wheat. Soft red winter and Durum are also down. White wheats, on the other hand, are slightly above average. In this connection the United States Department of Agriculture states:- (World Wheat Prospects, July 20, 1933).

"White wheat is the only class for which production this year is greater than the average consumption of recent years. There is a great deal of substitution of one class of wheat for another, depending upon their relative supplies. However, a normal utilization in years when feeding is at a minimum and supplies of hard red spring and soft red winter are not short, amounts to about 150,000,000 bushels of hard red spring, 30,000,000 of durum, 200,000,000 of hard red winter, 175,000,000 of soft red winter, and 45,000,000 bushels of white wheat. Average consumption of each class except hard red spring is higher than these figures because of feeding. This is especially true of hard red winter, white and durum wheats, and feeding has been especially heavy in the past 3 years."

B. Canada

The drought area, so clearly marked in the case of the central states to the south, extended into the Prairie Provinces and greatly reduced the prospects for production in 1933. Official estimates of 1933 production in Canada will not be issued until September 11, 1933 and therefore it is impossible to define the Canadian situation as clearly as that of the United States. During the second week in June one of the most disastrous droughts in the history of Canadian agriculture afflicted south-western Saskatchewan and quickly spread northward and westward and to a lesser extent eastward. By June 30, the condition of the Canadian spring wheat crop had dropped to 77 per cent of the long-time average and by the end of July the condition had further dropped to 57 per cent of the long-time average.

In addition to the drought experienced in western Canada, the same climatic factors have reduced production in the southern areas of Quebec and Ontario and in the Maritime Provinces.

When the deficiencies in Canadian production are added to the estimated deficiencies in the United States, the extent of the loss in production in North America will be extremely large. This vast reduction in production of grains in the United States and Canada is not only a matter of domestic concern but a major factor in establishing the world cereal position for the coming crop year.

The Southern Hemisphere.

During the past month the Argentinas and Australia have been active shippers of wheat. During the first three weeks of the present crop year the Argentine cleared 9,823,000 bushels of wheat as compared with 1,984,000 bushels during the same weeks last year. Shipments from Australia during the past three week were also in excess of shipments for the same weeks in 1932. Taking the Argentine and Australia together, these two countries have shipped 15,710,000 million bushels since the first of August, or well over one-half of world shipments for the period under review.

The persistence of exports from the Argentine and Australia is due in part to a larger carryover in the former country than was the case a year ago and in part to sharply advancing price levels at Winnipeg which curbed exports.

The European Situation

In marked contrast to the crop situation that has developed in North America during the present growing season, European wheat crops have developed under generally favourable conditions and a bountiful harvest has been gathered or is in prospect. In addition, sizeable reserves carried over from 1932 crops exist in several European countries, notably in France and Germany. As a consequence of production prospects and in line with policies pursued during the past four years, restrictions on imports of foreign wheat are particularly severe at the present time. As a result of the foregoing position, it is apparent that European import requirements will be relatively small during 1933-34.

On August 16, 1933 Mr. Broomhall estimated world import requirements for 1933-34 at 552 million bushels. This estimate, of course, is based upon preliminary estimates of production throughout Europe and might be influenced by untoward developments. Mr. Broomhall estimates that, out of total import requirements of 552 million bushels, Europe will take 400 million bushels and ex-European countries will take 152 million bushels. This estimate of import requirements may be compared with actual shipments in recent years as follows:-

1926-27.....	814 million bushels.		
1927-28.....	793	"	"
1928-29.....	928	"	"
1929-30.....	613	"	"
1930-31.....	788	"	"
1931-32.....	770	"	"
1932-33.....	615	"	"
1933-34 (Estimated).....	552	"	"

It will be noted from the above table that estimated shipments for the present crop year are considerably lower than actual shipments in preceding years. If the present estimate is justified by the course of trade in 1933-34, a continuous decline in world trade in wheat will be witnessed in each crop year since 1930-31. World shipments are estimated this year at slightly over 200 million bushels less than in 1930-31. Including the estimate for the present crop year, world shipments have averaged about 100 million bushels less from 1930-31 to 1933-34 than from 1926-27 to 1929-30.

This diminution in world shipments may be attributed to many causes, among the most important of which are the extremely high yields per acre in recent years in the large importing countries of continental Europe, moderate acreage expansion in the smaller importing countries, reduced purchasing power, the low level of international prices, and economic and financial difficulties associated with world wide depression. As far as the immediate future is concerned it is likely that these restrictive factors will continue for most or all of the present cereal year and will weigh upon the level of world trade in wheat. No doubt these factors have been fully considered by Mr. Broomhall in arriving at his estimate of the amount of wheat importing countries of the world will require in the next twelve months.

Of current interest are policies that will likely be pursued by France and Germany in respect to exports of wheat. France enters the present crop year with a surplus of wheat carried over from the bumper harvest of 1932. In view of the pressure of new wheat supplies, France has thought it advisable to export a

certain amount of wheat in order to relieve the domestic market of burdensome supplies. To facilitate exports an export bounty is now being paid and French wheat is moving outward and principally toward the United Kingdom. While the psychological effect of subsidized exports may be marked at the moment, there is undoubtedly a tendency to over-estimate the results of such exports. France will not export a great deal of wheat and insofar as she does export, France will be adding to the difficulties of exporters of soft wheats rather than the exporters of hard wheats.

The situation in Germany is somewhat different. Germany may appear on the market but it must be remembered that this country generally exports a small portion of domestic production from eastern Germany. Such wheat as is exported will be replaced with hard wheats imported through western Germany. By the granting of export privileges Germany is able to replace some of her soft wheat production with imported hard wheats without materially affecting the total volume of wheat available for consumption within the country. As in the case of France, such exports compete with soft wheat producers in the main and in addition open a market for hard wheats. In respect to the German regulations governing exports, Canada enjoys a distinct advantage in that replacements are made from the best quality wheat available and Manitobas are preferred.

Of far greater importance than exports from France and Germany are exports from the Danubian countries. The Danubian area has enjoyed a much more favourable growing season this year than in 1932 and as a consequence will have a surplus available for export - an entirely natural situation in years of normal production. Mr. Broomhall estimates that France and the Danubian countries will ship 40 million bushels during the present crop year. This is not a large amount for the Danubian countries to ship with normal or near-normal production.

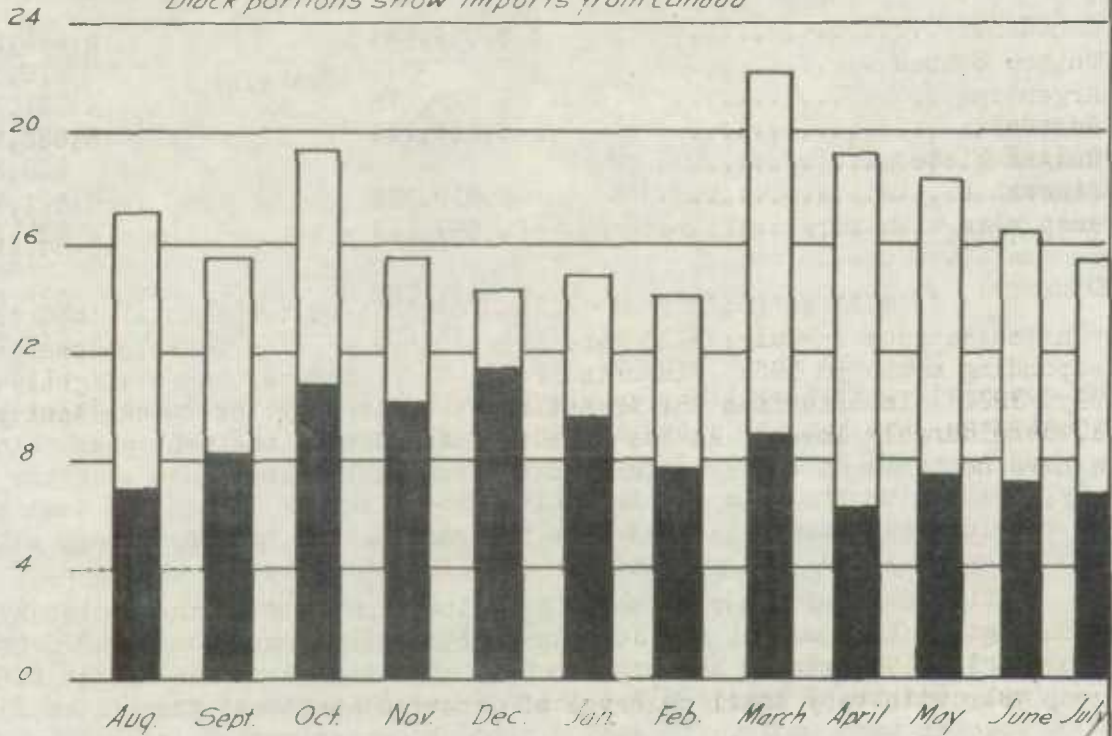
A great deal of interest attaches to the possibilities of Russia in the export market. Such information as is available indicates that Russia has a somewhat better crop this year than last. This does not mean, of course, that Russia will invade the world market with exports on the scale of 1930 or 1931. In fact the chances of a large export movement from Russia are probably remote. Russia will export some wheat during the present crop year. It must be remembered that the earliest and highest quality wheats are produced in the Black Sea area of Russia and owing to difficulties of internal transportation, it is advantageous to move these supplies outward rather than inward. The internal situation in Russia points, however, to a greater consumption of wheat in Russia this year and the building up of much needed food reserves if the 1933 crop is adequate. It is probably fair to state that the rural population of Russia has been under-fed during the past two years and consequently the Russian Government will make an effort to improve this condition if the 1933 harvest comes up to their expectations. The Soviet Government has been making efforts to spur its agricultural population to increase cereal production and undoubtedly the greatest encouragement the government could give to its agricultural workers would be a larger share of their production of bread grains.

Imports of Wheat into the United Kingdom

August to July 1932-1933

Black portions show imports from Canada

Million
Bushels



The United Kingdom

Imports of wheat into the United Kingdom during the month of July were lower than during the preceding month and the corresponding month last year. Imports during July amounted to 15,773,286 bushels compared with 16,493,593 bushels during June and 18,647,255 bushels during July, 1932. The following table shows imports of wheat into the United Kingdom for the ten-month period from August, 1932 to May, 1933 and for the months of June and July 1933:

From -	August-May	June	July	August-July
	(bushels)			
Canada	88,822,656	7,224,818	6,834,794	102,882,268
United States	2,191,880	37	-	2,191,927
Argentina	24,319,517	5,039,637	3,819,276	33,178,430
Australia	41,672,348	4,093,548	4,667,154	50,433,050
Russia	3,960,702	-	-	3,960,702
Others	11,141,835	135,533	452,062	11,729,430
Total	172,108,938	16,493,593	15,773,286	204,375,817
Last Year	192,718,494	18,054,675	18,647,255	229,420,424

As shown by the foregoing table, imports of wheat into the United Kingdom during the twelve months from August, 1932 to July, 1933, amounted to 204 million bushels compared with 227 million bushels for the same months in 1931-32. Out of total imports of 204 million bushels, Canada has supplied 103 million bushels or 50.5 per cent; Australia has supplied 50 million bushels or 24.5 per cent; the Argentine has supplied 33 million bushels or 16.2 per cent.

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

From:	<u>July, 1933</u>	<u>July, 1932</u>
	(Bushels)	
Canada	6,834,794	6,695,245
United States	-	219,359
Argentine	3,819,276	4,527,740
Australia	4,667,154	6,833,384
Russia	-	-
Others	452,062	373,527
T O T A L	<u>15,773,286</u>	<u>18,647,255</u>

It will be noted from the above table that the total imports of wheat into the United Kingdom in July, 1933 were about three million bushels lower than during the corresponding month in 1932. Imports from Canada, however, were slightly higher than during July, 1932. Imports from the Argentine were slightly lower than last year and from Australia, considerably lower. As has been the case during the past year, other reporting countries have not figured to any extent in the British market.

Stocks

Stocks of imported wheat and flour in ports of the United Kingdom have decreased during the past month. On July 1, 1933 stocks amounted to 12,320,000 bushels while on August 15, 1933 stocks amounted to 9,360,000 bushels. The United Kingdom commences the new crop year with very small reserves of imported wheat and flour.

New Crop

The 1933 wheat crop in the United Kingdom is estimated at 57 million bushels as compared with 45 million bushels in 1932. Dealing with the development of the British wheat crop, the London Corn Circular (July 31, 1933) states:-

"In the meteorological records of the British climate some years may have a mark set against them for an excess of abnormal conditions. It seems quite likely that 1933 will go down to history in that small group of years when exceptionally fine conditions prevailed during the summer, through sunshine and hot weather being plentiful and wet conditions scarce. For one feature the current year is assured of a special mark, and that is for the early start made in harvesting. We do not suggest that any record was established by the first cutting, for winter oats have been cut in June before now, but a start on the 4th July is, to say the least of it, unusually early. The first cutting of wheat occurred a fortnight later, in the area of Sussex near the Hampshire border, but the hot, sunny conditions and sultry nights were effective in bringing many early fields in other districts to maturity, and early last week cutting of wheat began in parts of the counties of Essex, Bedford and Huntingdon".

RUSSIA

The following table shows weather data for the principal wheat producing areas of Soviet Russia from July 20th to August 17th, 1933. These data indicate the conditions under which Russia has harvested a portion of the 1933 wheat crop. This material is provided by the London correspondent of the Dominion Bureau of Statistics and is received weekly by cable.

Week ending July 20th, 1933	Temperature Degrees Fahrenheit		Precipitation in Inches	Conditions on last day of week	
	Min.	Max.		Weather	Ground
Ukraine	48 to 61	82 to 91	0.1 to 0.8	Clear to overcast	Dry to wet.
Lower Volga	52 to 64	89 to 99	Nil to 0.2	Clear to cloudy	Dry exception wet (1).
Middle Volga	55 to 61	90 to 99	Up to 0.5	Cloudy	Dry.
Western Siberia	43 to 57	90	Nil to 0.9	Cloudy	Mainly wet.
Caucasus	57 to 61	81 to 88	Negligible to 0.2	Mainly clear	Mainly wet.
Ural	55 to 61	79 to 90	Up to 0.6		Lacking
Kazakstan	55 to 63	99 to 104	Negligible to 0.2	Clear to cloudy	Dry.
Central Black Soil	55 to 61	88 to 95	Negligible	Lacking	Dry.

Exceptions: - (1) Lower Volga - precipitation (0.8) and ground (wet) at Astrakhan.
 (2) Northern Caucasus - precipitation (1.2) at Piatigorsk.

July 27th, 1933.

Ukraine	57 to 63	77 to 90	0.1 to 0.7	Clear to cloudy	Mainly dry.
Lower Volga	59 to 68	91 to 97	Negligible to 0.4	Cloudy to overcast	Mainly dry.
Middle Volga	54 to 57	84 to 86	Up to 0.6	Cloudy to overcast	Mainly dry.
Western Siberia			Lacking		
Caucasus	50 to 66	81 to 90	0.1 to 0.7	Cloudy	Dry to wet.
Ural			Lacking		
Kazakstan	55 to 61	90 to 99	Nil to 0.1	Cloudy	Dry.
Central Black Soil	50 to 61	79 to 88	Nil to 0.7	Cloudy to overcast	Mainly wet

August 3rd, 1933.

Ukraine	54 to 63	79 to 90	Up to 0.3	Lacking	Lacking.
Lower Volga	54 to 64	86 to 99	0.1 to 0.8	Cloudy	Dry to wet.
Middle Volga	48 to 52	86 to 91	Up to 0.8	Lacking	Lacking
Western Siberia			Lacking		
Caucasus	54 to 57	79 to 86	0.1 to 0.3	Clear to cloudy	Dry.
Ural			Lacking		
Kazakstan	54 to 61	88 to 97	0.2 to 0.5	Clear to overcast	Dry.
Central Black Soil	50 to 59	84 to 90	0.2 to 1.0	Cloudy to raining	Mainly wet.

Week ending August 10th, 1933	Temperature Degrees Fahrenheit		Precipitation in inches	Conditions on last day of week	
	Min.	Max.		Weather	Ground
Ukraine	48 to 59	73 to 84	negligible to 0.9	Clear	Dry
Lower Volga	52 to 57	84 to 93	negligible to 0.5	Cloudy	Dry
Middle Volga	52 to 55	79 to 91	negligible to 0.5	Cloudy	Dry
Western Siberia	52 to 59	90	nil to 0.6	Clear to cloudy	Dry to wet
Northern Caucasus	52 to 61	84 to 88	negligible to 0.8	Clear to cloudy	Mainly dry
Ural	52 to 54	82 to 90	0.1 to 0.4	Cloudy	Mainly wet
Kazakstan	50 to 63	82 to 93	nil to 0.3	Cloudy	Dry
Central Black Soil	46 to 52	75 to 90	0.2 to 0.6	Clear to cloudy	Dry to wet

August 17th, 1933

Ukraine	39 to 55	68 to 84	.1 to 1.0	Clear	Dry
Lower Volga	41 to 48	86 to 93	.1 to .9	Cloudy	Mainly wet
Middle Volga	39 to 46	77 to 81	.0 to 1.0	-	Wet
Western Siberia	39 to 46	79 to 81	.0 to .7	Cloudy	Dry to wet
Northern Caucasus	43 to 46	82 to 90	.3 to .8	Clear	Dry
Ural	36 to 45	61 to 75	.0 to .8	Raining	Wet
Kazakstan	39 to 46	68 to 82	.4 to .6	Clear to cloudy	Wet

International Trade

The following table shows world shipments of wheat and wheat flour for the first 3 weeks of the present crop year. (Broomhall's figures)

Week ending	North America	Argentine	Australia	Russia	Other	Total
	(thousand bushels)					
August 7	4,204	1,916	2,782	-	80	8,982
14	3,276	4,860	624	-	128	8,888
21	3,486	3,047	2,481	248	360	9,622
Total	10,966	9,823	5,887	248	568	27,492
Last year	13,704	1,984	3,968	-	1,552	21,208

The new crop year has commenced with a very small international movement of wheat. During the three weeks ending August 21, world shipments amounted to 27 million bushels compared with 21 million bushels for the same weeks in 1932. During the same weeks of 1931, 1930 and 1929 world shipments amounted to 45, 46 and 45 million bushels respectively.

A feature of the past three weeks has been the large shipments from the Argentine. During the first three weeks of August, the Argentine has shipped 10 million bushels compared with 2 million bushels for the same weeks in 1932. This movement reflects the larger supplies of wheat now available in the Argentine and also the price levels that have obtained in Buenos Aires during the past two months.

North American shipments to date have amounted to 11 million bushels compared with 14 million bushels for the same weeks in 1932. Russia cleared a small amount of wheat during the week ending August 21.

The Course of Wheat Prices

The following summary of wheat price movements from July 3 to August 19 has been prepared by the Internal Trade Branch.

The culmination of an advance in wheat prices, beginning in March came on July 18, when No. 1 Manitoba Northern cash wheat was quoted at 94.0 cents per bushel. Since then prices have changed direction several times in short sharp spurts, but the general movement has been definitely downward. A decline of severe proportions at Winnipeg was halted on August 15, by establishing a minimum prices allowed, the closing figures for the preceding day. This meant No. 1 Manitoba Northern cash wheat could not be sold for less than 68 1/8 cents per bushel for the duration of this regulation.

Continued deterioration of crops in western Canada and the United States, furnished the background for a rise of over 21 cents per bushel in the first half of July. This increase, however, carried Canadian prices considerably above world market levels and when liquidation finally set in, the reaction was not checked until quotations had fallen roughly 20 cents. In four successive days (July 24 to 27 inclusive) 15 cents of this amount was recovered, but it could not be held. The course of prices from that time until market minimums were established was unevenly downward. Export buying of consequence in recent weeks was confined largely to occasional short intervals after sharp breaks on the market. Pressure from European, as well as Australian and Argentine wheat was mentioned repeatedly.

Cash closing prices for No. 1 Manitoba Northern wheat, basis Port Arthur and Fort William, average 83.4 cents per bushel in July, against 66.8 cents for June

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	83.4

Wheat Prices and the General Price Level ^{1/}

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	Board of Trade ^{2/}	Wheat No. 1
	Canada	(United Kingdom)	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>1 9 3 2</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	36.0
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>1 9 3 3</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	68.7	44.7
July	70.5		55.8

1/ Prepared by the Internal Trade Branch.

2/ Transposed from the base 1913-100

From June to July the general index of wholesale prices advanced from 67.6 to 70.5. The index of No. 1 Northern wheat increased from 44.7 to 55.8

Exchange Fluctuations.

There have been three distinct phases in exchange movement since the beginning of July at Montreal. Up to and including July 18th, the premium on United States dollars decreased, but rates on gold and sterling bloc currencies advanced steadily. On July 18th, sterling was quoted at 5.020, United States dollars at 1.035, French francs at .0592, Australian pounds at 4.010 and Argentine pesos at .3780. Then followed a reverse movement lasting until August 1st, when New York funds advanced to 1.081, while sterling fell to 4.820, French francs to .0569 and other related units by corresponding amounts. Since that time the Canadian dollar has shown independent strength as is usual at this time of year, and has appreciated by amounts ranging from a little better than one half of one per cent in the case of gold units to over two per cent against New York.

The following table shows recent exchange quotations at Montreal:

Exchange Quotations at Montreal, February 6th, 1933, to August 18th, 1933.

	United Kingdom Pound	United States Dollar	Australia Pound	Argentine Paper Peso
	4.8666	1.000	4.8666	.4244
February 6, 1933	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	4.5043	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
17	5.0202	1.0456	4.0161	.3816
24	4.9024	1.0506	3.9219	.3834
31	4.8282	1.0762	3.8625	.3766
August 7	4.7975	1.0700	3.8380	.3718
14	4.7209	1.0600	3.7766	.3683
18	4.7750	1.0600	3.8100	.3617

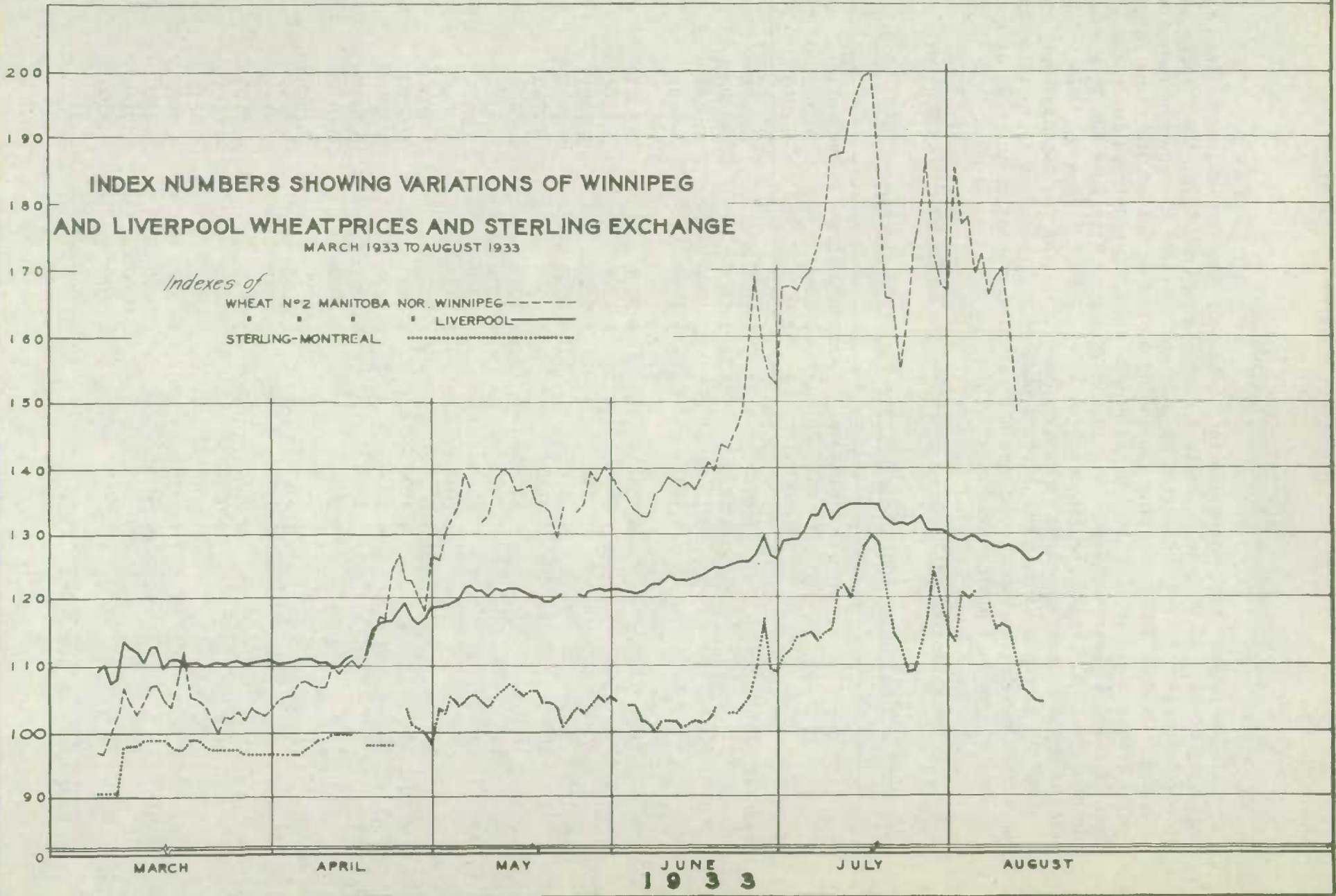
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Av Oct-Nov-100

INDEX NUMBERS SHOWING VARIATIONS OF WINNIPEG AND LIVERPOOL WHEAT PRICES AND STERLING EXCHANGE MARCH 1933 TO AUGUST 1933

Indexes of

WHEAT N°2 MANITOBA NOR. WINNIPEG ———
LIVERPOOL ———
STERLING-MONTREAL ·····



The Canadian Situation.

- I. The 1933 Crop Season and Prospects.
- II. 1933 Wheat Acreages in the Prairie Provinces.
- III. Disposition of the 1932 Crop.
- IV. Canadian Exports during 1932-33.

I. The 1933 Crop Season and Prospects.

In summary, the spring wheat crop on the Prairies is reduced in area seeded by 1,212,000 acres or 4.6 p. c. compared with 1932 and at the end of July, the condition of Canadian spring wheat was 57 compared with 77 on June 30 of this year and 88 on July 31, 1932. The severity of damage compares closely with the 1931 season when the comparable condition figures were 56 at the end of June and 54 at the end of July. The acreage in the Prairie Provinces was 25,439,000 in 1931 compared with 25,177,000 in 1933. In the records of the Bureau dating back to 1908, these are the seasons of greatest reduction in wheat prospects.

The fall wheat crop of Ontario, as first estimated on August 10, will return 14,143,000 bushels from 559,000 acres, a yield of 25.3 bushels per acre, as compared with 15,062,000 bushels from 536,000 acres, a yield per acre of 28.1 bushels in 1932.

The Growing Season in the Prairie Provinces. - The spring wheat crop on the Prairies had an excellent promise in the early spring despite some misgivings as to the sufficiency of sub-soil moisture in important wheat districts. During the second week of June, one of the most disastrous droughts in Canadian agricultural history began its work. The early centre of damage was in south-western Saskatchewan, but the affected area quickly spread north in both Saskatchewan and Alberta and went to the foothills. Skipping a stretch of country in the central part of Saskatchewan, the effects of limited precipitation and high temperatures also became apparent in south-eastern Saskatchewan and south-western Manitoba, two regions which have had more than their fair share of climatic and other adversities in the recent past. Turning westward, local showers prevented serious declines in south-eastern Alberta and along the Foremost line, but the drought was especially severe over the rest of southern Alberta. As the season advanced into July, most of the drought areas suffered further loss of condition.

During the month of July, precipitation over western Canada was very limited and over most of the territory, there were at least two periods of extremely hot weather. In certain southern localities (e.g. between Regina and Moosomin and between Manyberries and Foremost), heavy thunder showers afforded some relief and in northern areas, there were some beneficial rains added to the more ample soil moisture supplies. The dry area spread north and west in Alberta particularly, bringing in the normally productive area running south along the foothills from Calgary and also extending north in Crop Districts 7 and 8 and parts of Crop District 10. Similarly in Saskatchewan, the dry belt extended north and east; only Crop District 5 really escaped the effects of drought, combined with insect damage. In Manitoba also, the stricken areas were widened toward the north and east, affecting all but the extreme northerly districts. In the original drought area, conditions turned from bad to worse during July. Thus it was a real tribute to prairie fertility that wheat prospects showed a decline of only 26 per cent in condition during July.

Insect Damage.-- Although cutworms and wireworms caused considerable damage in widely scattered localities, the greatest insect damage of the season was caused by grasshoppers. These pests were present in outbreak form during a particularly long period, extending well into August. Most severe damage was done in Manitoba and Saskatchewan; control measures seemed to be more effective in the smaller areas of Alberta affected. Crops were ravaged at all stages of growth and the full-grown adult 'hoppers also caused considerable damage to the panicles of oats and the heads of wheat previous to harvest. Sawfly damage became apparent in Saskatchewan during the second week of August.

Hail.-- The reduced number of clouds which gathered during the late growing season was undoubtedly an important factor in limiting hail damage to crops.

Diseases.-- Rust damage was negligible, but there were many indications of reduced stands and growth because of rootrots. The root system of the 1933 wheat crop was not particularly healthy or well developed. Ample moisture during germination and early growth discouraged extensive spreading of roots. Later in the season it was hard to distinguish between damage due to drought and the work of rootrots because of this feature.

Frost.-- On July 18 and 20, again at the 31st, and on several mornings in early August, varying degrees of frost were recorded at Saskatchewan and Alberta points. The first frosts of July caught a considerable wheat area on the Calgary-Macleod line in the flower or early milk stage. Some tens of thousands of acres were a complete loss and were cut for feed, while in more favourable locations, loss in both grade and yield will undoubtedly result. The later frosts caught wheat mostly in the dough stage so that grades will be more seriously affected than yields. The northern areas of Saskatchewan and Alberta, where these frosts occurred, cannot be definitely outlined until threshing results are reported.

Condition Chart.-- Accompanying this review is a map of the Prairie Provinces, giving for each Crop District the condition of spring wheat at May 31, June 30 and July 31, 1933 and July 31, 1932. The 1933 acreages are also listed so that a proper weighting of the deterioration between crop districts can be made.

Comparison, Drought Area with 1931.-- Previous mention has been made of the similarity between the 1931 and 1933 seasons in severity of crop damage. The 1933 drought area is located further west and north than the area of greatest damage in 1931. The 1931 centre was in the Regina-Weyburn region (Crop District 2) of Saskatchewan, extending over most of the wheatlands of Manitoba, but visiting only Crop District 1 of Alberta with real severity.

The 1933 drought area centers around Crop District 7 of Saskatchewan and Crop District 5 of Alberta but extending fanwise in a southeasterly and southwesterly direction to cover a large part of southern Alberta, Saskatchewan and Manitoba.

It is interesting to note that Crop District 2, which had a July 31 condition of 6 in 1931, was 78 in 1933, while Crop District 5, which was only 44 at July 31, 1931, was 99 (the highest in the province) at July 31, 1933. This indicates the improvement in the east-central part of the spring wheat area. In Alberta, however, the position is reversed; the drought area extends right to the mountains south of Calgary and as far north as Vermilion in Crop District 7.

Grades and Quality. Without a doubt, the 1933 crop will be lower in grade than the high-grade harvests of the past four years, but it will not suffer in comparison with average conditions. While protein content should approach normal, practically all the early-harvested crops went through the filling stage suffering from lack of moisture. In many sections, the straw was forced into maturity earlier than was conducive to proper ripening of the still-green kernels. This was partly a result of the narrow root systems. From inspection, one would judge that the earliness of the drought lead to a greater reduction of yield than of grade. The number of rows in the head was less than usual, and even in the center row two kernels to the spikelet were more common than three. Despite these natural adaptations, shrunken and small berries will result in many areas.

11. 1933 Wheat Acreages in the Prairie Provinces.

The 1933 wheat areas, as released for the Prairie Provinces on August 10, contained no surprising features. As the accompanying table shows, the correspondence with the 'Intentions' report of May 10 was marked. Some observers expected that the Saskatchewan acreage would fall further, i.e. below the 'Intentions' because of a number of factors, including seed shortage, limited soil moisture reserves in some regions, and discouraging prices, but the two figures were practically identical. Thus the practice of allowing for the low bias in farmers' intentions (as revealed by the results of two previous years' experience) was justified. The slight increase above the 'Intentions' in Manitoba and Alberta is readily explained by favourable spring moisture conditions and rising prices.

In connection with the acreage figures as compiled from the June survey, some technical improvements have been made which are designed to increase the reliability of the figures. Manitoba acreages have not presented any particular difficulty because of the relatively settled farm program, but improvements were desirable in Saskatchewan and Alberta. In Saskatchewan, estimation of crop acreages is now being done by the method of 'representative farms'. Previously, the total number of cards returned (about 25 to 30 thousand for the province) was compiled and estimates made for each Crop District, by relating these to the total number of Saskatchewan farms (about 134,400). With evidence of high bias in these figures and unsuccessful efforts to correct them by flat reductions, a change was sought. For 1932 and 1933, the acreages have been compiled from the returns of about 10 to 12 thousand farmers who report each year, using the change in their acreages as representative of the change throughout the province. This method of compilation appears to eliminate the percentage bias.

Changes have also been initiated in Alberta. Working through the rural schools in the past, only 10 to 12 thousand cards were returned, and these were hardly representative enough to make either method entirely dependable. In 1933, cards were addressed personally to each farmer and a very satisfactory response of about 24,000 cards was the result. In 1934, it is planned to use the 'representative farms' method for Alberta also, compiling the cards of those farmers who have reported in both 1933 and 1934.

	<u>1932 Acreages</u>	<u>1933 'Intentions'</u>	<u>1933 Acreages</u>
Manitoba	2,651,000	2,437,000	2,536,000
Saskatchewan	15,543,000	14,766,000	14,743,000
Alberta	8,201,000	7,716,400	7,898,000
Prairie Provinces	26,395,000	24,919,400	25,177,000

The distribution of the 1933 acreages by Crop Districts is given on the condition map accompanying this section of the Review.

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

AT MAY 31, JUNE 30, JULY 31, 1933
AND JULY 31, 1932

ORDER OF CONDITION

1933 FIGURES

MAY 31-104

JUNE 30-100

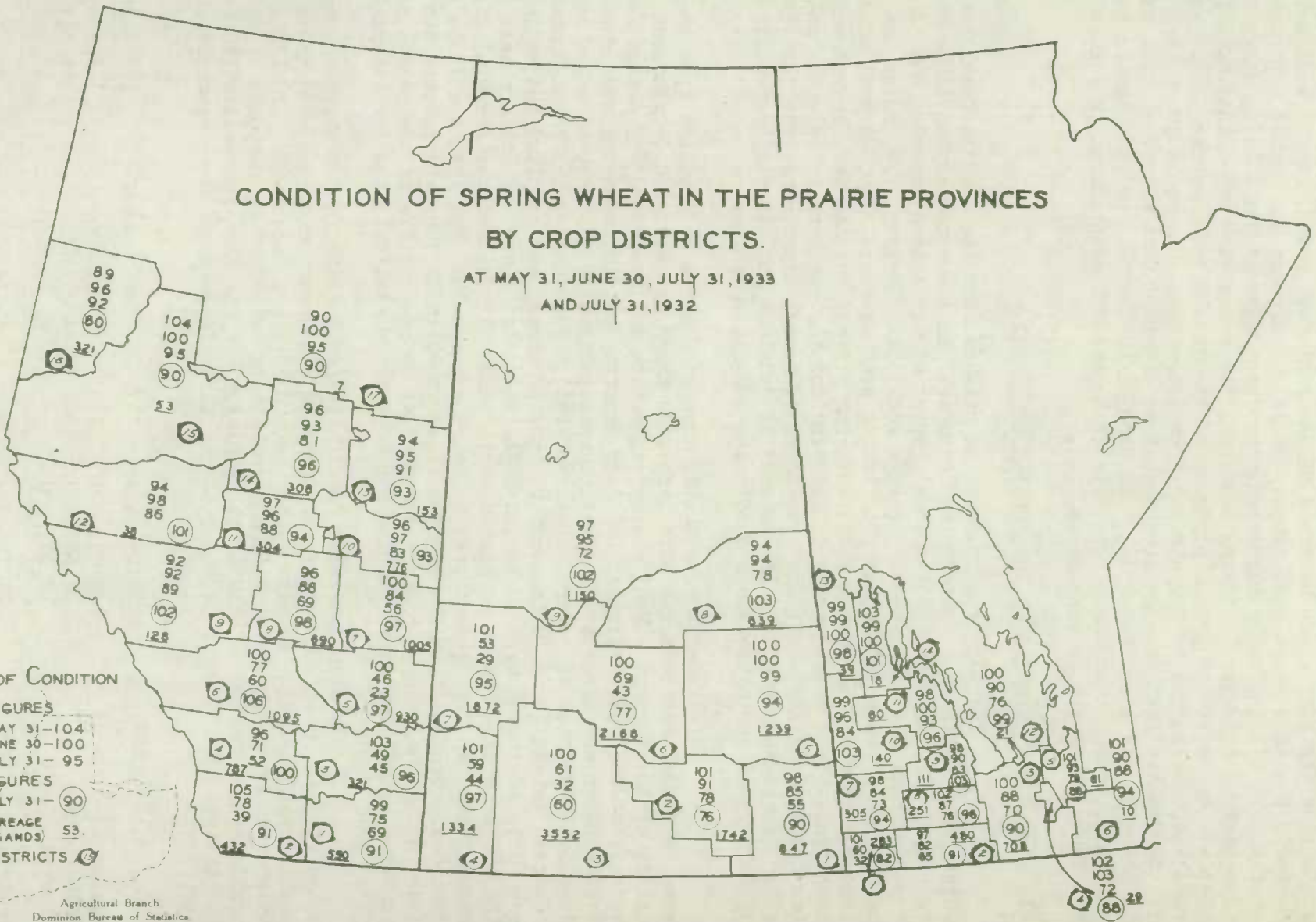
JULY 31-95

1932 FIGURES

JULY 31-

1933 ACREAGE
(IN THOUSANDS) 53.

CROP DISTRICTS (3)



III. Disposition of the 1932 Crop.

The disposition of the wheat crop of the previous year is more uncertain than usual this year, but there is evidence that the 1932 crop was finally underestimated by about 20-25 million bushels. Final revision of the 1932 wheat crop estimates will not be made until January, 1934, when the final figures for deliveries and platform loadings are made available by the Board of Grain Commissioners and when the final estimates of wheat-feeding are compiled in the Bureau. At this time, however, a preliminary indication of the distribution is given.

The carryover of wheat in Canada at July 31, 1932 was finally placed at 131,844,806 bushels. The 1932 crop added supplies, estimated last January at 428,514,000 bushels. Small imports of about 51,400 bushels in the months of August 1932 to July 1933 comprise another addition. The total for distribution thus amounted to 560,410,206 bushels.

The disposition of wheat during the period August 1, 1932 to July 31, 1933 was as follows:-

	<u>Bushels</u>
Exports	264,304,327
Human consumption	41,500,000
Seed for 1933 crop	32,277,000
Feed for live stock and poultry	36,542,000
Loss in cleaning	7,200,000
Unmerchantable	2,108,000
Carryover, July 31, 1933	<u>211,740,188</u>
	<u>595,671,515</u>

The figures for human consumption, seed and feed are subject to later revision, probably downward.

The following table reveals an under-estimate in the wheat crop of the Prairie Provinces as shown by marketing and other disposition. In connection with these figures also, it is worthy of note that final figures of the discrepancy will probably be lower, since revisions are usually in that direction.

Disposition of Wheat in the Prairie Provinces, 1932-33.

	<u>Manitoba</u>	<u>Saskatchewan</u>	<u>Alberta</u>	<u>Total</u>
		(000	bushels)	
Carryover on farms, July 31, 1932	624	1,016	4,189	5,829
January Estimate 1932 crop	<u>42,400</u>	<u>202,000</u>	<u>164,000</u>	<u>408,400</u>
Total Available	<u>43,024</u>	<u>203,016</u>	<u>168,189</u>	<u>414,229</u>
Disposition:				
Marketings 1/	37,700	187,900	145,000	370,600
Seed 2/	3,470	16,430	11,100	31,000
Feed 1/	2,037	12,152	11,405	25,594
Unmerchantable	254	606	820	1,680
Country Millings 1/ 3/.....	410	634	544	1,588
Carryover on farms, July 31, 1933	<u>862</u>	<u>4,290</u>	<u>5,874</u>	<u>11,026</u>
Total Disposition	<u>44,733</u>	<u>222,012</u>	<u>174,743</u>	<u>441,488</u>
Extent of Underestimate, Indicated	1,709	18,996	6,554	27,259
Estimate as Indicated by Disposition	<u>44,109</u>	<u>220,996</u>	<u>170,554</u>	<u>435,659</u>

1/ Subject to revision. 2/ Allows 2 million bushels in Saskatchewan for seed drawn from previous deliveries. 3/ July millings estimated.

EXPORT CLEARANCES OF CANADIAN WHEAT, 1932-33

The following table shows export clearances of wheat (not including flour) from various ports, by weeks, during the crop year 1932-33:

Week ending	Montreal	Quebec	Sorel	Saint John	West Saint John	Halifax	Churchill	Vancouver	Victoria	Prince Rupert	U.S. Ports	Total
	(Bushels)											
Aug. 5	1,216,717	-	-	-	-	-	-	544,877	-	-	581,000	2,342,594
11	1,905,534	79,970	228,800	-	-	-	-	1,131,319	-	-	487,000	3,832,623
18	1,154,778	-	-	-	-	-	280,013	702,562	-	-	276,000	2,413,353
25	2,066,446	-	709,213	-	-	-	255,700	668,886	-	-	187,000	3,887,245
Sept. 2	2,174,438	-	261,790	-	-	-	288,000	969,503	62,695	-	441,000	4,197,426
9	2,296,647	-	120,000	-	-	-	544,000	693,061	-	-	327,000	3,980,708
15	2,018,054	-	657,641	-	-	-	-	1,072,181	-	-	476,000	4,223,876
22	3,271,758	24,000	241,881	-	-	-	697,000	1,818,990	251,933	-	374,000	6,679,162
29	3,588,568	-	1,018,130	-	-	-	134,992	1,199,598	-	300,000	977,000	7,218,288
Oct. 6	3,267,452	-	1,268,581	-	-	-	265,658	1,840,531	-	377,813	908,000	7,928,035
13	2,031,527	268,485	1,115,818	-	-	-	270,666	2,548,272	-	-	712,000	6,946,769
20	2,326,378	-	871,724	-	-	-	-	3,510,818	-	-	352,000	7,060,920
27	1,476,441	-	877,341	-	-	-	-	2,234,185	-	-	692,000	5,279,967
Nov. 4	2,574,980	-	-	-	-	-	-	3,369,022	-	-	425,000	6,369,002
11	2,670,003	-	451,703	-	-	-	-	2,884,080	-	-	236,000	6,241,787
18	3,204,186	-	1,011,568	-	-	-	-	2,371,146	-	-	382,000	6,968,900
25	2,900,141	-	440,670	-	-	-	-	3,295,565	-	-	528,000	7,164,376
Dec. 2	3,514,217	246,400	1,521,737	-	-	-	-	3,132,614	281,493	-	538,000	9,234,461
9	1,506,929	599,049	276,667	-	333,886	-	-	3,755,210	-	-	621,000	7,092,741
16	-	-	-	-	408,000	72,000	-	2,067,163	-	-	504,000	3,051,163
23	160	-	-	119,991	535,961	-	-	3,809,913	-	-	304,000	4,770,025
30	353	-	-	-	363,879	-	-	1,475,213	-	-	1,749,000	3,588,445
Jan. 7	160	-	-	16,000	344,000	-	-	2,168,601	-	-	448,000	2,976,761
13	-	-	-	155,055	669,993	-	-	4,018,411	-	-	777,000	5,620,459

Jan.	7	160	-	-	15,000	344,000	-	-	2,168,601	-	-	448,000	2,976,761
	13	-	-	-	155,055	669,993	-	-	4,018,411	-	-	777,000	5,620,459
	20	200	-	-	-	201,809	-	-	1,674,823	-	-	699,000	2,575,832
	27	353	-	-	116,400	402,800	32,000	-	1,782,119	-	-	601,000	2,934,672
Feb.	3	160	-	-	101,836	222,000	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	-	-	133,500	99,980	-	-	3,529,591	-	-	820,000	4,583,231
	24	353	-	-	142,968	221,961	380,315	-	1,225,744	289,666	-	808,000	3,069,007
March	3	160	-	-	137,070	282,984	55,571	-	1,779,084	-	-	1,238,000	3,492,869
	9	-	-	-	79,302	516,961	24,942	-	2,019,272	280,934	-	183,000	3,104,411
	17	160	-	-	107,501	209,514	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	-	-	40,750	187,969	-	-	1,766,976	-	-	673,000	2,668,855
April	7	-	-	-	79,929	168,109	232,000	-	1,525,014	-	-	94,000	2,099,052
	14	160	-	-	44,745	8,000	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	-	298,667	395,000	4,655,415
	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	-	-	-	-	-	591,908	-	-	400,000	2,578,824
	13	1,149,866	-	-	-	-	-	-	652,135	-	-	-	1,802,001
	20	674,867	308,379	266,000	-	-	-	-	379,695	-	-	377,000	2,005,941
	27	1,314,337	300,334	-	-	-	-	-	903,254	-	-	196,000	2,713,925
TOTAL		66,343,629	6,130,794	16,905,011	1,275,047	5,589,826	1,655,901	2,736,030	91,712,728	1,997,857	976,480	26,330,000	221,653,303
LAST YEAR		53,854,011	88,326	7,758,165	35,951	1,981,057	77,111	544,769	75,627,167	224,000	320,320	32,025,000	172,535,877

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	18,289,832	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	16,373,532	19,620,224	12,060,817	19,868,298
T O T A L	240,136,568	132,803,382	228,536,403	155,766,106

	<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	492,765	446,379	466,967	658,834
T O T A L	5,370,613	5,383,594	6,701,663	6,778,023

	<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	18,590,974	21,628,930	14,106,169	22,833,051
T O T A L	264,304,326	207,029,555	258,267,212	186,267,212

Canadian Trade Commissioners report as follows: -

GERMANY

Grain in Farmers' Hands

The following table published by the Markets Reports Bureau of the German Agricultural Council shows the results of their investigations covering the stocks of grain available in the hands of farmers on June 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>June 15th, 1933</u>	<u>June 15th, 1932</u>
Winter wheat	7.7	3.6
Summer wheat	9.7	5.1
Winter rye	7.7	4.5
Winter barley	3.9	2.4
Summer barley	3.8	4.6
Oats	16.5	13.3
Potatoes	4.6	3.8

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>	
	<u>June 15th, 1933</u> Bushels	<u>June 15th, 1932</u> Bushels
Winter wheat	12,492,654	4,776,603
Summer wheat	2,204,586	1,102,293
Winter rye	25,152,000	11,790,000
Winter barley	918,612	459,306
Summer barley	4,593,060	5,511,672
Oats	71,975,064	53,170,768
Potatoes	76,793,079	61,360,977

The decrease in local offers, which has lately characterized the market, is confirmed by the investigations made of stocks in farmers' hands on June 15th. The increasing decline of stocks which was noticeable in previous months, still continued during May 15th and June 15th. In conjunction with the strict prohibition of imports of grain, the feeding stuffs policy was successful in effecting the use of enormous quantities of grain for feeding purposes. It is therefore anticipated that, with the exception of oats, no remains of the old crop will be taken over into the new crop year.

Mill and Warehouse Stocks.

The Government Bureau of Statistics gives the following figures of the grain and flour stocks in second hand in mills and warehouses at the end of June, 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>June</u>	<u>May</u>	<u>April</u>	<u>June</u>	<u>May</u>	<u>April</u>
	<u>B u s h e l s</u>			<u>B u s h e l s</u>		
Wheat	16,056,735	20,407,118	23,412,703	878,160	995,738	485,009
Rye	14,381,313	18,857,512	21,731,412	1,618,045	1,724,340	1,889,688
Oats	3,345,868	4,597,326	5,569,962	19,453	19,453	12,968
Barley	2,007,167	2,884,442	3,844,391	349,073	335,293	390,410
	<u>B a r r e l s</u>			<u>B a r r e l s</u>		
Wheat flour	1,344,148	1,294,656	1,398,139	-	1,125	1,125
Rye flour	600,649	677,136	742,375	-	-	-

Stocks of wheat and rye in second hand in June, 1933, were twice and three times respectively larger than in the same period last year. Stocks of oats, barley and flour were not so very much larger.

The above figures include 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.

Grain Imports.

According to a statement of the Government Bureau of Statistics imports of grain into Germany were smaller during June as compared with the previous month: -

<u>Kind of Grain</u>	<u>June</u>	<u>May</u>
	<u>B u s h e l s</u>	
Wheat	2,873,457	3,065,440
Rye	431,085	1,338,608
Feeding barley	18,418	79,092
Other barley	756,431	772,828
Oats	42,796	123,590
Wheat flour (Barrels)	1,923	2,160
Rye flour (Barrels)	394	281

Crop Estimates.

The German Government Bureau of Statistics has given its first estimate as at the beginning of July of the crops to be expected in Germany. The final crop will, of course, depend a lot on weather conditions. An estimate of the yields per acre is given as follows: -

<u>Kind of Grain</u>	<u>Preliminary Estimate</u>		<u>Final Estimate</u>		
	<u>Yields per Acre in Bushels</u>				
	<u>1933</u>	<u>1932</u>	<u>1932</u>	<u>1931</u>	<u>1930</u>
Winter rye	29.2	28.5	30.1	24.5	26.1
Summer rye	22.6	22.3	22.0	19.4	18.8
Winter wheat	32.6	32.7	32.7	29.0	31.7
Summer wheat	31.8	31.8	31.7	29.6	31.1
Spelt	24.0	-	25.1	21.7	21.6
Winter barley	43.7	44.1	47.2	41.4	45.0
Summer barley	35.9	36.4	36.4	33.5	33.5
Oats	50.9	50.4	53.0	48.5	43.0

The quantities of the yields are estimated as follows: -

Kind of Grain	Preliminary Estimate		Final Estimate		
	1933	1932	1932	1931	1930
	Bushels		Bushels		
Rye	323,609,070	312,979,575	329,120,660	262,981,580	302,350,080
Wheat	185,920,086	183,348,069	183,715,500	155,423,313	139,256,349
Spelt	6,430,284	-	6,889,590	5,970,978	6,430,284
Winter barley	29,395,584	26,639,748	28,936,278	23,424,606	22,046,688
Summer barley	116,204,418	119,419,560	118,960,254	115,285,806	109,314,828
Oats	400,726,032	409,155,544	431,201,960	402,671,304	367,007,984

Compared with the final crop of last year, the new estimate is 30,374,296 bushels less. The difference results principally from the oat estimate, which is 23,025,676 bushels smaller. However especially in the case of oats the estimate is subject to change. Taking into consideration all circumstances in regard to the actual bringing in of the crop a very good crop is expected in Germany.

Area Under Cultivation.

The German Government Bureau of Statistics has published the areas cultivated this year in comparison with the last two years: -

Kind of Grain	1933	1932	1931
	Acres		
Winter rye	10,996,351	10,829,984	10,609,153
Summer rye	160,621	166,309	179,134
Winter wheat	5,016,313	4,882,612	4,653,324
Summer wheat	716,616	752,145	702,341
Spelt	271,820	283,113	281,833
Winter barley	672,136	607,416	561,212
Summer barley	3,237,128	3,267,406	3,439,686
Oats	7,858,066	8,116,765	8,310,145

The area cultivated with rye has been increased by 1.4 per cent, that of wheat by 1.7 per cent, and that of winter barley by 10.7 per cent. On the other hand the area cultivated with summer barley has declined by 0.9 per cent and that of oats by 3.2 per cent.

AUSTRIA.

The Austrian Department of Agriculture has given a statement of crop conditions as at the end of June, on the basis of 2 - above average, and 3 - average, as follows: - (Comparative figures for June 30th, 1932, in brackets) winter wheat 2.1 (2.5); summer wheat 2.7 (2.6); winter rye 2.1 (2.4); summer rye 2.3 (2.6); winter barley 2.3 (2.6); summer barley 2.1 (2.5); oats 2.4 (2.5); potatoes 2.4 (2).

POLAND.

According to statements of the Government Bureau of Statistics in Warsaw there has been a decline in the areas cultivated with the following grains: - winter wheat a decline of 4.6 per cent, the area amounting to 3,705,647 acres; winter barley by 0.1 per cent - 98,844 acres; summer wheat 0.8 per cent - 376,594 acres; summer barley 0.2 per cent - 2,876,843 acres; oats 0.1 per cent - 5,480,136 acres. On the

other hand the area cultivated with winter rye was increased by 3 per cent, amounting to 14,309,835 acres, and that of summer rye by 0.7 per cent, amounting to 63,754 acres.

The Government Bureau of Statistics further states that an improvement of the crop as on July 5th could be noticed, and the following figures, on the basis of 5 - very good; 3 - average; 1 - poor, are given: - winter wheat 3.7 (3.3 last year); winter rye 3.8 (3.4); winter barley 3.5 (3.3); summer wheat 3.5 (3.3); summer barley 3.5 (3.6); oats 3.3 (3.4); summer rye 3.3. In spite of the smaller areas cultivated the same quantity of oats is expected as last year, so that there will probably be an export surplus of more than 19,452,720 bushels. Of wheat there should be about 3,674,310 bushels available for export. In the case of barley and oats an export quantity of 4,899,080 - 9,798,160 bushels is expected.

LATVIA.

The German Grain Journal reports that the cold and late Spring with the succeeding dry summer weather has unfavourably influenced the crop in its growth. However, an average harvest is generally expected in Latvia.

LITHUANIA.

According to the Department of Agriculture in Lithuania stocks in the Government warehouses amount to 1,181,055 bushels of rye and 257,202 bushels of wheat. It is stated that requirements in Lithuania would seem to be sufficiently covered up to the new crop.

AUSTRALIA.

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

"Firmness outlined in report of July fifteenth on Australian wheat was of brief duration though farmers sold freely at three shillings then equivalent to fifty-nine cents bushel Canadian funds at country stations hence comparatively small quantity Australian wheat now held by growers. Prices offered today declined to about two shillings eight pence to two shillings nine pence Australian equivalent Canadian funds to fifty cents to fifty-two cents at country stations. F.o.b. steamer quotations average three shillings two pence half penny or fifty-nine cents per bushel Canadian. Since beginning of season Australia has shipped wheat and flour equivalent to 125,740,748 bushels or approximately 3,370,000 tons of which 60,059,265 bushels were for United Kingdom and continent and 65,681,483 bushels to other destinations of which some 21,069,000 bushels were shipped as flour. In addition about 300,000 tons are committed for shipment making total shipped and committed 3,670,000 tons leaving today surplus of 360,000 to 400,000 tons available for export of which a portion will be exported as flour. Thus balance wheat Australia has to ship is negligible on world's markets. Crop prospects were maintained during period under review by useful rains in all states hence no reason to alter previous estimate of 160 to 180 million bushels provided present conditions maintained. Flour market without animation prices during month declined in competition with oversea offerings and today average f.o.b. steamer prices seven pounds five shillings in Australian currency in 150 pound sacks; equivalent to twenty-seven dollars twenty-two cents Canadian funds and forty-nine pound bags seven pounds twelve shillings six pence or twenty-eight dollars sixty-three cents Canadian with no inquiries from Orient. Freights unchanged from those cabled July fifteenth."

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