

No. 1 Hard

Nov. 4th, 1914

THE crop movement this season was remarkably early and in the beginning of October receipts began to fall off, the result being that inspections down to November 4th, despite the early movement, are considerably less than those of a year ago.

	1914 Bus.	1913 Bus.
Wheat	49,034,700	70,455,900
Oats	11,552,500	17,916,600
Barley	2,199,150	7,215,750
Flax	1,237,500	3,390,200

And with lessening receipts, drought in Australia, frost in the Argentine and more widespread devastation in Europe, came a steady improvement in our markets. Only the big receipts in the Primary Markets of the United States and the increase in their visible, retarded the sharpness of the advance for a time. The export demand has been the keenest in many years. The Allies are resigned to a long, tedious war. Russia cannot ship either through the Baltic or through the Black Sea, so America's biggest competitor has for the last two months been entirely out of the market and now that war with Turkey is a fact, Russia will likely be unable to ship for many months to come. The British crop was a good one but now that Britain must feed at home several millions of refugees from Belgium and Northern France, a vast army from Overseas in training, besides her own people, and on the Continent must feed a great army at the front, it follows that she must buy heavily in all our markets. The wheat has moved rapidly off the Pacific Coast and statistics indicated that on October 31st over 70 per cent of the marketable wheat was out of the hands of the United States farmers. It is very probable that 80 per cent has gone from the hands of our farmers. The country elevators last reported having around 20,000,000 bushels in store. This will likely decrease considerably before November 20th, as much will be shipped before the close of navigation and many houses closed.

The excellent weather has enabled Western farmers to get their plowing done early and well and a safe estimate would place the acreage prepared for wheat at 15 per cent more than

last year. This increase means another 3,000,000 bushels of seed required to be kept at home. It becomes evident that early estimates of the 100,000,000 bushels of marketable wheat (after allowing for seed and interior milling) will have to be revised downward, even as the United States crop estimate of spring wheat has had to be reduced each Government report. Yields have been disappointing.

Reports of at least three frosts in the Argentine are confirmed at the time their crop was from the bloom to the dough stage and much damage may have resulted. Harvesting will be general in the north in a fortnight. In Australia rains came too late to help much and their quantity for export will be very small. The Government is now conserving the balance of stocks for the use of the Empire. From Germany and Austria little can be learned, except that wheat, rye and animal foods are all advancing rapidly. Broomhall predicts a serious shortage of food supplies for all European countries if the Dardanelles are kept closed—and now that Turkey is in the conflict this seems most likely. The world crop is thought to be at least 400,000,000 bushels short of last year. The United States has seeded about 40,000,000 acres to winter wheat and it is said to now promise well. In Europe the winter seeding of wheat and rye has been greatly retarded by scarcity of labor of man and horse and by devastation. New Zealand announces that she will have to buy 1,000,000 bushels of Canadian wheat for seed purposes. As import duties on wheat have been removed by all European countries now at war, that saving of duty inures to our benefit as producers.

France finds her wheat crop disappointing in yield and is a keen buyer at present. The Germans in their devastation have purposely destroyed many flour mills in Northern France, hence France is taking flour readily now.

The speculative element in the wheat market is rather more bold now than a long war is inevitable. Recently exporters have been taking almost all offers, which has made brisk markets. Broomhall estimates that outside of Germany, Austria and Belgium, Europe will have to import 560,000,000 bushels and we know that Belgium and Germany have been big importers of wheat, particularly our low grade and American Durum. Farmers will usually do well to put their grain ahead to the secondary markets for sale. It seems very probable that wheat will work irregularly to higher levels this month.

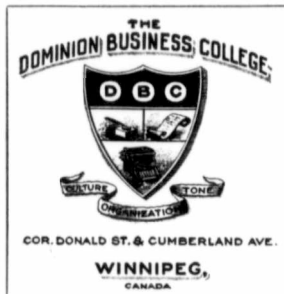
Coarse Grains

As predicted in these columns, the price of oats has steadily

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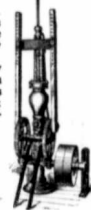
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