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Coarse grains review

AUGUST 1973



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Agriculture Division

Crops Section

COARSE GRAINS REVIEW

AUGUST 1973

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S Y M B O L S

The following standard symbols are used in Dominion Bureau of Statistics publications:

- .. figures not available.
- nil or zero.
- P preliminary figures.
- r revised figures.

Due to rounding, the sums of individual items may not agree exactly with the totals.

WORLD SITUATION

World Corn Crop in 1972 Second of Record

The following account of the world production has been taken from the World Agricultural Production and Trade, published by the United States Department of Agriculture, Foreign Agricultural Service, under date of June 30, 1973.

World corn production in 1972 totalled 284 million metric tons in the final estimate for the season. This was 2 per cent below the 291 million-ton record of 1971. World corn area was down 5 per cent at 106 million hectares.

The South American corn crop is estimated at 27.1 million tons, 24 per cent above the poor outturn of last season. Argentine corn production at 9.8 million tons was the largest in recent years, a result of much better growing conditions than in the previous year. The Brazilian crop is expected to be about the same as that of 1970, with good yields.

The African harvest, by contrast, is estimated at 16.3 million tons, down 30 per cent, a result of critical drought in the southeastern part of the continent, where harvests are just being completed. South Africa's crop is estimated at 4.4 million tons, the lowest since 1963.

The United States produced its second largest crop of corn, 141 million tons, 2 per cent less than in 1971. The U.S. yield was 10 per cent above the year-earlier record, as area declined 11 per cent.

The West European harvest at 17.5 million tons was down slightly for the year. The French crop was off 600,000 tons because of bad harvest-time weather.

The East European crop was up 12 per cent with gains in all important countries. The Soviet crop is estimated a million tons over 1971 following heavy planting of corn in winterkilled areas of other crops.

The Asian corn harvest is estimated 13 per cent lower at 34.9 million tons. Declines were general in important producing countries.

FEED SITUATION IN CANADA

Feed Grain and Fodder Supplies in 1972-73

Total supplies of Canadian feed grain (oats, barley, rye, corn, buckwheat and mixed grains) decreased by 6 per cent in 1972-73 compared with the previous year, due to lower levels in production of oats, barley, rye, corn, buckwheat and mixed grains combined with lower stocks of oats.

Total supplies of oats, at 418.5 million bushels were some 14 per cent below the 488.9 million in 1971-72 due to a 17 per cent decrease in production combined with a 6 per cent drop in carryover stocks. Barley supplies amounting to 714.3 million were 4 per cent lower than the 745.9 million of the previous year with smaller production offsetting larger carryover stocks. Supplies of rye, at 29.3 million bushels declined from last year's total of 34.7 million due to lower production which more than offset higher carryover stocks. The 1972 outturns of mixed grains, at a next-to-record 104.3 million bushels was 3 per cent below the 1971 all-time high of 107.1 million and the buckwheat crop at 1.7 million declined by 32 per

cent. Supplies of corn, at a record 145.9 million bushels, surpassed by 12 per cent the 1971-72 previous high of 129.8 million due to a sharp increase in imports of corn coupled with a higher carryover which more than offset a decline in production.

Domestic disappearance of oats decreased from 360.1 million bushels in 1971-72 to 331.9 million in 1972-73, with most of the decline accounted for by a smaller volume of oats for feeding. At the same time, exports of Canadian oats were down by 34 per cent from the 10.5 million of the previous year. Although total disappearance (domestic and export) decreased slightly during the 1972-73 crop year, the influence of smaller available supplies resulted in a July 31, 1973 carryover of 79.7 million, 33 per cent less than the 1972 level of 118.3 million.

Revised(1) Total Supply and Disposition of Canadian Oats 1968-69 - 1972-73
and Estimated Supply, 1973-74
(Crop Years August 1 - July 31)

| Item | 1968-69 | 1969-70 | 1970-71 | 1971-72 ^r | 1972-73 ^r | 1973-74 |
|----------------------------|---------|---------|---------|----------------------|----------------------|----------|
| million bushels | | | | | | |
| <u>Supplies</u> | | | | | | |
| Carryover, at beginning | | | | | | |
| of crop year | 77.0 | 128.7 | 141.3 | 125.4 | 118.3 | 79.7(2) |
| Production | 356.7 | 354.9 | 353.1 | 363.5 | 300.2 | 333.3(3) |
| Imports, oats & products . | .. | .. | .. | .. | .. | .. |
| Total | 433.7 | 483.6 | 494.4 | 488.9 | 418.5 | 413.0 |
| <u>Disposition</u> | | | | | | |
| Exports, oats & products . | 2.7 | 5.2 | 13.4 | 10.5 | 6.9 | |
| Human consumption | 4.6 | 4.8 | 4.8 | 5.0 | 5.0 | |
| Seed | 19.9 | 17.9 | 17.4 | 16.1 | 17.3 | |
| Industrial use | — | — | — | — | — | |
| Carryover, at end of | | | | | | |
| crop year | 128.7 | 141.3 | 125.4 | 118.3 | 79.7 | |
| Residual item (4) | 277.8 | 314.4 | 333.4 | 339.0 | 309.5 | |
| Total | 433.7 | 483.6 | 494.4 | 488.9 | 418.5 | |

- (1) Revised basis 1971 Census acreage.
- (2) Subject to further revision pending receipts of Canadian Grain Commission's final data on commercial stocks at July 31, 1973.
- (3) Based on conditions as at August 15 and subject to revision as later estimates become available.
- (4) Includes feed for livestock and waste but also reflects the effect of any estimating errors in other components of the balance sheet.

Exports of Canadian barley during the 1972-73 crop year, at 165.2 million bushels, were 28 per cent below the 230.6 million, while domestic disappearance due to a substantial increase in barley used for feeding purposes, amounted to a record 356.4 million. The effect of smaller supplies and record feed use resulted in year-end stocks of 192.7 million bushels in 1973 slightly below the 195.8 million at July 31, 1972.

Revised(1) Total Supply and Disposition of Canadian Barley 1968-69 — 1972-73
and Estimated Supply, 1973-74
(Crop Years August 1 - July 31)

| Item | 1968-69 | 1969-70 | 1970-71 | 1971-72 | 1972-73 | 1973-74 |
|--|---------|---------|---------|---------|---------|----------|
| million bushels | | | | | | |
| <u>Supplies</u> | | | | | | |
| Carryover, at beginning of crop year | 130.9 | 199.4 | 200.1 | 144.3 | 195.8 | 192.7(2) |
| Production | 326.0 | 371.3 | 408.3 | 601.6 | 518.4 | 484.1(3) |
| Imports, barley & products | .. | .. | .. | .. | .. | .. |
| Total | 457.0 | 570.7 | 608.4 | 745.9 | 714.3 | 676.7 |
| <u>Disposition</u> | | | | | | |
| Exports, barley & products | 26.4 | 88.3 | 179.6 | 230.6 | 165.2 | |
| Human consumption | 0.2 | 0.1 | 0.1 | 0.1 | 0.1 | |
| Seed | 15.3 | 15.8 | 22.0 | 19.7 | 19.5 | |
| Industrial use (4) | 17.3 | 18.4 | 19.1 | 21.1 | 18.7 | |
| Carryover, at end of crop year | 199.4 | 200.1 | 144.3 | 195.8 | 192.7 | |
| Residual item (5) | 198.4 | 247.9 | 243.3 | 278.6 | 318.1 | |
| Total | 457.0 | 570.7 | 608.4 | 745.9 | 714.3 | |

(1) Revised basis 1971 Census acreage.

(2) Subject to further revision pending receipts of Canadian Grain Commission's final data on commercial stocks at July 31, 1973.

(3) Based on conditions as at August 15 and subject to revision as later estimates become available.

(4) Adjusted for imports and exports of malt.

(5) Includes feed for livestock and waste but also reflects the effect of any estimating errors in other components of the balance sheet.

Production of tame hay in Canada in 1972 was placed at 23.9 million tons, 3 per cent below the 1971 figure of 24.7 million. The 1972 crop of fodder corn was estimated at 10.4 million tons, unchanged from the previous year.

The Feed Outlook for 1973-74

Total supplies of Canadian feed grains in 1973-74 are expected to decrease from last year's level due to smaller production of barley, corn and mixed grains and lower opening stocks of oats, barley and rye. On the basis of conditions at August 15, production of oats in 1973 is forecast at 333.3 million bushels, representing an increase of 11 per cent over last year's total of 300.2 million. This year's barley crop is forecast at 484.1 million bushels, 7 per cent below last year's crop of 518.4 million. Realization of these outturns would result in supplies of oats for 1973-74 of 413.0 million bushels, showing a decrease of one per cent from the 1972-73 level of 418.5 million. Supplies of barley, at 676.7 million would be 5 per cent less than the 714.3 million of the preceding year. In addition to supplies of the major feed grains, the 1973 outturn of mixed grains is forecast at 98.2 million bushels, compared with the 104.3

million produced in 1972. It is emphasized that realization of the 1973 yield and production forecasts is dependent on the existence of satisfactory weather conditions during the remainder of the harvesting season.

Canada's 1973 crop of tame hay was forecast at 25.6 million tons, 7 per cent above last year's 23.9 million. Compared with 1972, increases in production were registered in all provinces except Alberta and British Columbia this year.

1972-73 Exports
of Oats, Barley
and Rye

Exports of Canadian oats in bulk totalled 6.7 million bushels during 1972-73 as against 10.2 million shipped during both the previous year and the ten-year (1961-62 - 1970-71) average. The major markets for Canadian oats in 1972-73 with 1971-72 figures in brackets were as follows in millions of bushels: United States, 4.1 (3.5); Netherlands, 1.1 (1.6); Venezuela, 0.6 (0.2); Switzerland, 0.4 (0.5); and Ireland, 0.2 (0.2). Customs exports of Canadian seed oats amounted to 169 thousand bushels in the 1972-73 crop year as against 233 thousand in 1971-72. In addition, exports of Canadian oatmeal and rolled oats amounted to the equivalent of 38 thousand bushels in 1972-73 compared with 25 thousand the year before.

Barley exports during the 1972-73 crop year, at 156.8 million bushels were 30 per cent less than the 1971-72 record figure of 224.3 million but sharply above the ten-year average of 52.1 million. Italy remained Canada's number one market for this grain with imports of 44.8 million bushels as against 40.2 million the year previous. Other major importers were recorded as follows, with 1971-72 totals in brackets, in millions of bushels: Japan, 41.0 (30.8); U.S.S.R. (Russia), 26.5 (22.0); United States, 11.8 (13.2); Britain, 11.0 (28.3) and Israel, 8.2 (8.2). In addition exports of Canadian malt in terms of barley amounted to 8.4 million bushels compared with 6.3 million in 1971-72. The major market for malt during the 1972-73 crop year was Japan, with 5.1 million bushels, followed by United States, 0.7 million; and Venezuela, 0.5 million.

Exports of Canadian rye, at 8.2 million bushels, were 23 per cent below the 1971-72 total of 10.8 million bushels. The principal destination for the 1972-73 crop year was Japan with that country purchasing 6.1 million bushels. Smaller exports went to Chile, 0.8 million; Britain, 0.5 million; Netherlands, and Belgium and Luxembourg, 0.2 million each.

Weather
and Crops

A Telegraphic Crop Report, published by Statistics Canada on September 12, 1973 summarized crop conditions in each of the Prairie Provinces as follows: Swathing is almost finished in Manitoba and combining is about 40 to 50 per cent complete with average yields reported throughout the province. Heavy rains a week ago delayed harvesting operations and a hail storm caused extensive damage to crops in the northwest and central regions. Lower grades are expected due to excessive weathering. Fall tillage of stubble fields is well under way. Over 50 per cent of the cereals and rapeseed are now combined in Saskatchewan. The warm, dry weather is maturing late crops in the north and northeast where combining will be general by the weekend. Wet weather delayed combining and deteriorated the sample in the central and eastern districts last week. However, combining had resumed by the weekend. Most yields are better than anticipated earlier. In the south of Alberta farmers have nearly completed harvesting grain, oilseeds and some canning crops with variable yields reported. The seeding of fall cereals is also practically finished and growers of main crop potatoes have now started to dig. Elsewhere in the province work is much less advanced partially as a result of recent rains in some districts and the per cent of both swathing and combining completed varies considerably from place to place.

Initial Payment Prices
Wheat, Oats and Barley
1973-74 Crop Year

On August 1, 1973 The Canadian Wheat Board in its Instructions to the Trade No. 7 for the 1973-74 Crop Year stated that:

Instruction to the Trade No. 4 dated July 26, 1973, is hereby cancelled and replaced with the following:

The Canadian Wheat Board announces the following initial payments effective on and after August 1, 1973:

| | | |
|---------------|---|--|
| <u>Wheat</u> | - | Two dollars and twenty-five cents (\$2.25) per bushel basis the grade No. One C.W. Red Spring in store Thunder Bay or Vancouver. |
| <u>Oats</u> | - | One dollar and ten cents (\$1.10) per bushel basis the grade No. 2 Canada Western in store Thunder Bay or Vancouver. |
| <u>Barley</u> | - | One dollar and fifty cents (\$1.50) per bushel basis the grade No. 2 Canada Western Six Row in store Thunder Bay or Vancouver. |

General Quotas 1973-74 as at Monday, August 27, 1973

| <u>A</u> bushels per quota acre | | |
|------------------------------------|----|------------|
| Alberta Red Winter | 5 | All blocks |
| Soft White Spring | 5 | All blocks |
| Rye | 20 | All blocks |
| Flaxseed | 15 | All blocks |
| Rapeseed (other) | 15 | All blocks |

Special Quotas as at Monday, August 27, 1973

| | | |
|----------------------------------|--------------------------------------|------------|
| Selected Soft White Spring Wheat | Rail - 1 carlot (40 assigned acres) | All blocks |
| | Truck - 50 bushels per assigned acre | |
| Selected Hercules Durum | | |
| Selected oats | Rail - 1 carlot (60 assigned acres) | All blocks |
| | Truck - 50 bushels per assigned acre | |
| Selected barley | | |
| Rye for distilleries | 30 bushels per assigned quota acre | All blocks |
| Flaxseed for processors | 20 bushels per assigned quota acre | All blocks |
| Rapeseed (low erucic acid) | | |
| Rapeseed for crushers | 25 bushels per assigned quota acre | All blocks |
| Two-Row barley | | |
| Six-Row barley (olli variety) | | |
| Malting pot & pearling barley | 50 bushels per assigned quota acre | All blocks |

General Quotas 1973-74 as at
Monday, August 27, 1973 Canadian National Railway Blocks

| No. | Name | Oats | | Barley |
|-----|--------------------|------------------------|----|--------|
| | | A | B | A |
| | | bushels per quota acre | | |
| 01 | Winnipeg N. | 10 | 10 | 10 |
| 03 | Winnipeg S. | 10 | 10 | 10 |
| 05 | Winnipeg W. | 10 | 10 | 10 |
| 07 | Brandon N. | 10 | 10 | 10 |
| 09 | Brandon W. | 10 | 10 | 10 |
| 11 | Melville | 10 | 10 | 10 |
| 13 | Dauphin | 10 | 10 | 10 |
| 15 | Kamsack | 10 | 10 | 10 |
| 17 | Saskatoon M. | 10 | 10 | 10 |
| 19 | Saskatoon S. | 10 | 10 | 10 |
| 21 | Saskatoon W. | 10 | 10 | 10 |
| 23 | Saskatoon N. | 10 | 10 | 10 |
| 25 | Pr. Albert E. | 10 | 10 | 10 |
| 27 | Pr. Albert S. | 10 | 10 | 10 |
| 29 | Pr. Albert W. | 10 | 10 | 10 |
| 31 | Saskatoon E. | 10 | 10 | 10 |
| 33 | Regina S. | 10 | 10 | 10 |
| 35 | Regina W. | 10 | 10 | 10 |
| 37 | Biggar N. | 10 | 10 | 10 |
| 39 | Biggar W. | 10 | 10 | 10 |
| 41 | Edmonton N. | 10 | 10 | 10 |
| 43 | Edmonton S. | 10 | 10 | 10 |
| 45 | Edmonton W. | 10 | 10 | 10 |
| 47 | Hanna S. | 10 | 10 | 10 |
| 49 | Hanna W. | 10 | 10 | 10 |
| 90 | Nar West | 10 | 10 | 10 |
| 98 | G.S.L. | 10 | 10 | 10 |

General Quotas 1973-74 as at
Monday, August 27, 1973 Canadian Pacific Railway Blocks

| No. | Name | Oats | | Barley |
|------------------------|---------------------|------|----|--------|
| | | A | B | A |
| bushels per quota acre | | | | |
| 61 | Keewatin | 10 | 10 | 10 |
| 62 | La Riviere | 10 | 10 | 10 |
| 63 | Carberry | 10 | 10 | 10 |
| 64 | Brandon | 10 | 10 | 10 |
| 71 | Weyburn | 10 | 10 | 10 |
| 72 | Pasqua | 10 | 10 | 10 |
| 73 | Bulyea | 10 | 10 | 10 |
| 74 | Bredenbury | 10 | 10 | 10 |
| 75 | Saskatoon | 10 | 10 | 10 |
| 76 | Wilkie | 10 | 10 | 10 |
| 77 | Assiniboia | 10 | 10 | 10 |
| 78 | Swift Current | 10 | 10 | 10 |
| 79 | Outlook | 10 | 10 | 10 |
| 81 | Medicine Hat | 10 | 10 | 10 |
| 82 | Brooks | 10 | 10 | 10 |
| 83 | Lethbridge | 10 | 10 | 10 |
| 84 | Vulcan | 10 | 10 | 10 |
| 85 | Calgary | 10 | 10 | 10 |
| 86 | Red Deer | 10 | 10 | 10 |
| 87 | Edmonton | 10 | 10 | 10 |
| 95 | N.A.R. East | 10 | 10 | 10 |
| | B.C. Stations | 10 | 10 | 10 |

Delivery Quotas
1973-74 Crop Year

The Canadian Wheat Board in its instructions to the Trade re Quotas (General) No. 1 under date of July 27, 1973 for the 1973-74 Crop Year stated that the Board wishes to advise that all delivery quotas in effect in the 1972-73 crop year, including all special quotas and special permits, will automatically expire as at the close of business July 31, 1973.

Effective on and after August 1, 1973, the Board's quota policy for the 1973-74 crop year will be as indicated below.

Separate quotas, providing for the delivery of the kinds and grades of grain needed to meet market requirements will be established by the Board for Hard Red Spring, Durum, Soft White Spring, Alberta Winters, Utility types of Wheat, Oats, Barley, Rye, Flaxseed and Rapeseed, and will be based on the producer's quota acres assigned by him and shown in his 1973-74 delivery permit book.

Quotas for the delivery of Board Wheat, Oats and Barley will be non-cumulative and each quota as announced will be designated by an alphabetic letter; e.g., the first Wheat quota will be Wheat "A"; the second Wheat "B"; and so on as quotas are established. Similar alphabetical designations will be used for Oats and Barley quotas.

Quotas for non-Board grains will be cumulative and these quotas will be announced in the usual way at a specified level per assigned quota acre.

Selected Soft White Spring wheat.— Effective August 1 the Board will consider applications submitted by Mills on behalf of producers to deliver Selected Soft White Spring Wheat provided:

- (a) the producer has assigned quota acres to Selected Soft White Spring Wheat; and
- (b) the Mill agrees to accept delivery of the Selected Soft White Spring Wheat when shipped to it.

Full details covering the foregoing provisions are outlined in Instructions to the Trade re Quotas - Selected Soft White Spring Wheat No. 1 dated July 27, 1973.

Producers with Soft White Spring Wheat who are unable to take advantage of this program will be able to deliver this type of wheat to country elevators under separate quotas that will be established for this type of wheat.

Selected Pitic 62, wheat.— Effective August 1 the Board will consider applications on behalf of producers of high quality Pitic 62 Wheat for permission to deliver such wheat provided:

- (a) the producer has re-assigned fifty (50) quota acres to Selected Pitic Wheat for the shipment of a carlot; and
- (b) a representative sample of such carlot has been submitted to and accepted by a selector, and meets the following specifications:

- (i) must grade No. 1 or No. 2 Canada Utility.

- (ii) have a minimum of fifty-eight (58) pounds test weight per bushel.
- (iii) be not less than 95 per cent Pitic variety, reasonably sound and fairly well matured kernels with not over 3 per cent other cereal grains.
- (iv) moisture content must not be over 14.5 per cent.

Full details covering the foregoing provisions are outlined in Instructions to the Trade re quotas - Selected Pitic 62 Wheat No. 1 dated July 27, 1973.

Selected oats to mills and processors.— Effective August 1 the Board will consider applications on behalf of producers of high quality oats for permission to deliver such oats provided:

- (a) the producer has assigned quota acres to Selected Oats;
- (b) a representative sample of such oats has been submitted to and accepted by a mill or processor as suitable and to be used for the manufacture of breakfast foods and other products used for human consumption;
- (c) the oats will grade Extra No. 1 Feed or higher; and
- (d) a premium is to be paid to the producer for such oats so accepted.

Full details covering the foregoing provisions are outlined in Instructions to the Trade re Quotas - Selected Oats No. 1 dated July 27, 1973.

Selected malting, pot and pearling barley.— Effective August 1 the Board will consider applications on behalf of producers of malting, pot and/or pearling barley for permission to deliver one car of such barley provided:

- (a) the producer has assigned fifty (50) quota acres to such barley;
- (b) a representative sample of such carlot has been submitted to and accepted by a maltster or shipper as suitable for malting, pot and/or pearling; and
- (c) a premium is to be paid to the producer for the carlot of barley so accepted.

Full details covering the foregoing provisions are outlined in Instructions to the Trade re Quotas - Selected Barley No. 1 dated July 27, 1973.

Rye to distillers and flaxseed or rapeseed for crushing plants during the 1973-74 crop year.— Separate quota acres assignments will not be required for delivery of rye, flaxseed or rapeseed to country elevators or specialty markets. Producers will make only one acreage assignment for each of these grains when completing their 1973-74 permit books. This single assignment for each of these three grains will be the basis for deliveries that are made during the current crop year, whether it be to a country elevator or to a specialty market, such as a crushing plant or distillery. The permit book has therefore been re-designed to accommodate such deliveries.

Specialty market quotas for the 1973-74 crop year are as detailed here-under effective August 1, 1973:

Rye to Distillers - thirty (30) bushels per assigned quota acre.
Flaxseed to Crushers - twenty (20) bushels per assigned quota acre.
Rapeseed to Crushers - twenty-five (25) bushels per assigned quota acre.

The "maximum deliverable" of rye, flax or rapeseed for a producer will be determined by multiplying the quota acres assigned in the permit book to each of the grains times the quota level established for the respective specialty market.

Deliveries to country elevators will be basis the quota acres assigned in the permit book and quota levels will be announced by the Board from time to time.

Total deliveries under elevator quotas plus total deliveries to specialty markets cannot exceed the maximum deliverable for each grain.

The maximum balance deliverable to distillers, rapeseed or flaxseed crushing plants must be reduced by deliveries made to country elevators.

It will be appreciated if all companies will bring the 1973-74 quota policy to the attention of elevator managers and producers.

Custom Grinding of Grain for Feed and
Exchange of Grain for Prepared Feeds

The Canadian Wheat Board in its instructions to the Trade No. 13 under date of August 30, 1973 for the 1973-74 Crop Year stated

that effective August 1, 1973, producers and owners of livestock or poultry may deliver to any processing or feed mill within the province in which their land is located.

- (1) any quantity of grain to be ground or otherwise processed into prepared feed with or without supplements and returned to them provided
 - (a) that the identity of such grain is preserved while in the processing or feed mill, and
 - (b) that the entire quantity of grain is returned
- (2) any quantity of grain to be exchanged for prepared feeds provided
 - (a) that the quantity of grain delivered does not exceed the quantity of grain by weight contained in the prepared feed delivered in exchange therefor, and

(b) that delivery of the prepared feed is made as aforesaid within six weeks of the delivery of the grain as aforesaid,

upon the condition that records of such transactions satisfactory to the Board be maintained by the manager or operator of the processing or feed mill which records may be examined at any time by an authorized officer, agent or employee of the Board.

This Order shall expire on the 31st day of July, 1974.

Millfeeds Production of millfeeds, during the 1972-73 crop year amounted to 650,274 tons, slightly below the previous year's total of 653,396 tons and 4 per cent less than the ten-year (1961-62 - 1970-71) August-July average of 674,212 tons. Exports of millfeeds at 246,416 tons were one per cent above the comparable 1971-72 figure of 243,819 tons and more than doubled the ten-year average of 119,697 tons. The combined effect of a small decrease in production coupled with larger exports, and after making an allowance for change in mill stocks resulted in 404,463 tons being available to the domestic market during the 1972-73 crop year compared with 409,188 tons a year ago.

Supply and Distribution of Millfeeds, August - July 1972-73 and 1971-72

| Month | Production | Exports | Apparent domestic disappearance(1) |
|--|------------|---------|------------------------------------|
| | | tons | |
| August 1972 | 56,094 | 14,713 | 38,921 |
| September | 57,274 | 19,489 | 38,448 |
| October | 62,539 | 44,966 | 19,621 |
| November | 56,012 | 16,479 | 40,447 |
| December | 44,428 | 21,955 | 22,890 |
| January 1973 | 53,594 | 24,925 | 26,804 |
| February | 49,315 | 11,766 | 40,586 |
| March | 58,134 | 22,168 | 33,196 |
| April | 49,626 | 9,226 | 41,757 |
| May | 55,490 | 26,142 | 28,547 |
| June | 52,106 | 20,620 | 31,551 |
| July | 55,662 | 13,967 | 41,695 |
| Total | 650,274 | 246,416 | 404,463 |
| Same period 1971-72 ^r | 653,396 | 243,819 | 409,188 |

(1) Adjusted for change in mill stocks.

August Forecast of the
1973 Production of Canada's
Principal Grain Crops

Canada's 1973 wheat crop, currently forecast at 604.4 million bushels is 13 per cent larger than last year's 533.3 million, but two per cent below the ten-year (1962-71) average of 614.2 million. The increase in production over the 1972 figure results from a 16 per cent increase in this year's seeded acreage in the Prairie Provinces. The average yield decreased slightly from 25.0 bushels in 1972 to 24.4 bushels per acre this year, but is above the 1962-71 average of 23.8 bushels per acre. The 1973 crop of spring wheat, forecast at 590.6 million bushels is being harvested from a seeded area of 24.4 million acres and yielding an indicated 24.2 bushels per acre. The 1972 spring wheat crop of 517.4 million bushels was produced on 21.0 million acres and yielded an average of 24.7 bushels per acre. The 1973 yield for Ontario's winter wheat crop is placed at 39.4 bushels per acre as compared with 43.5 bushels in 1972. With a 4 per cent decrease in acreage this year's production at 13.8 million bushels is well below the 15.9 million in 1972.

Production of oats in 1973 forecast at 333.3 million bushels, represents an increase of 11 per cent from last year's total of 300.2 million but a 12 per cent decrease from the ten-year average of 378.6 million. The average yield for the 1973 oat crop is estimated at 49.9 bushels per acre compared with last year's 49.2 bushels. The 1973 barley crop is forecast at 484.1 million bushels, some 7 per cent lower than last year's 518.4 million but 60 per cent above the ten-year average of 303.0 million bushels. The average yield for the 1973 barley crop is estimated at 40.5 bushels per acre compared with 41.4 bushels in 1972.

Production of rye, forecast at 14.4 million bushels is 7 per cent above last year's outturn of 13.5 but below the ten-year average of 15.4 million bushels. Some 13.7 million bushels of this year's crop is fall rye which averaged 23.1 bushels per acre, while the spring rye crop is forecast at 0.7 million bushels, averaging 17.6 bushels per acre. Canada's 1973 crop of mixed grains is forecast at 98.2 million bushels compared with last year's 104.3 million and the ten-year average of 83.4 million bushels. Average yields decreased from 50.5 bushels in 1972 to 49.1 bushels per acre in 1973.

This year's flaxseed crop currently forecast at 18.9 million bushels will be some 7 per cent higher than last year's revised outturn of 17.6 million. This year's higher production results from an increase of 10 per cent in seeded acreage. Production of rapeseed is placed at 55.3 million bushels in 1973, as compared with the 57.3 million bushels produced in 1972. Acreage seeded this year decreased 4 per cent from the 1972 level and the average yield at 17.6 bushels per acre is slightly above last year's average of 17.5 bushels.

August Forecast of the 1973 Production of Principal Grain Crops
Canada and Prairie Provinces, Compared with 1972

| Province and crop | Area | | Yield per acre | | Production | |
|--------------------------|------------------------|---------------|-------------------|---------|-------------------------|-------------|
| | 1972 | 1973 | 1972 | 1973(1) | 1972 | 1973(1) |
| | acres | | | | bushels | |
| <u>CANADA</u> | | | | | | |
| Winter wheat | 365,000 | 350,000 | 43.5 | 39.4 | 15,878,000 | 13,790,000 |
| Spring wheat(2) | 20,984,700 | 24,385,700 | 24.7 | 24.2 | 517,410,000 | 590,616,000 |
| All wheat | 21,349,700 | 24,735,700 | 25.0 | 24.4 | 533,288,000 | 604,406,000 |
| Oats for grain | 6,104,000 | 6,678,000 | 49.2 | 49.9 | 300,208,000 | 333,338,000 |
| Barley for grain | 12,510,900 | 11,958,200 | 41.4 | 40.5 | 518,413,000 | 484,065,000 |
| Fall rye | 593,000 | 591,500 | 21.6 | 23.1 | 12,784,000 | 13,669,000 |
| Spring rye | 41,500 | 42,000 | 17.8 | 17.6 | 740,000 | 740,000 |
| All rye | 634,500 | 633,500 | 21.3 | 22.7 | 13,524,000 | 14,409,000 |
| Mixed grains | 2,064,900 | 2,001,500 | 50.5 | 49.1 | 104,285,000 | 98,229,000 |
| Flaxseed | 1,321,000 ^r | 1,450,000 | 13.3 ^r | 13.0 | 17,617,000 ^r | 18,900,000 |
| Rapeseed | 3,270,000 | 3,150,000 | 17.5 | 17.6 | 57,300,000 | 55,300,000 |
| <u>PRAIRIE PROVINCES</u> | | | | | | |
| Wheat(2) | 20,800,000 | 24,200,000 | 24.7 | 24.2 | 513,000,000 | 585,000,000 |
| Oats for grain(3) ... | 4,660,000 | 5,300,000 | 51.1 | 51.3 | 238,000,000 | 272,000,000 |
| Barley for grain | 11,900,000 | 11,350,000(3) | 41.3 | 40.2 | 492,000,000 | 456,000,000 |
| Rye | 581,500 | 582,000 | 20.5 | 22.2 | 11,940,000 | 12,940,000 |
| Flaxseed | 1,320,000 | 1,450,000 | 13.3 ^r | 13.0 | 17,600,000 ^r | 18,900,000 |
| Rapeseed | 3,270,000 | 3,150,000 | 17.5 | 17.6 | 57,300,000 | 55,300,000 |

(1) As indicated on basis of conditions on or about August 15.

(2) Includes durum wheat.

(3) Estimated areas for harvest as grain.

Stocks on Farms Farm-held stocks of the six major grains in Canada at July 31, 1973 amounted to 270.6 million bushels, only half of last year's total of 541.3 million. Declines occurred in stocks of each of the six grains as compared with those of 1972. This year's stocks on farms at July 31, in millions of bushels, with last year's totals and the ten-year 1963-72 averages in brackets are estimated as follows: wheat, 115.0 (311.5, 245.7); oats, 65.0 (96.0, 94.4); barley, 88.0 (106.0, 72.4); rye, 1.6 (5.5, 3.1); flaxseed, 0.6 (6.0, 2.5); and rapeseed, 0.4 (16.3, N.A.).

Data for farm stocks estimates were obtained from the annual July 31 Statistics Canada stocks survey as modified by available information on disposition. In addition, in the Prairie Provinces, the results of a special stocks survey conducted in conjunction with the annual June acreage survey, were taken into account. It should be emphasized that estimates of stocks of farm-held grain include not only marketable grain but also reserves for feed, seed and other purposes.

Estimated Farm Stocks of Grain in Canada, July 31, 1973 and 1972

| Province | Wheat | Oats | Barley | Rye | Flax-seed | Rape-seed |
|----------------------------|----------------------|--------|---------|-------|-----------|-----------|
| thousand bushels | | | | | | |
| Prince Edward Island | 25 | 300 | 100 | — | — | — |
| Nova Scotia | 50 | 200 | 100 | — | — | — |
| New Brunswick | 25 | 500 | 100 | — | — | — |
| Quebec | 1,400 | 6,000 | 700 | — | — | — |
| Ontario | 3,000 | 5,000 | 3,500 | — | — | — |
| Manitoba | 5,000 | 8,000 | 8,000 | 100 | 100 | 50 |
| Saskatchewan | 85,000 | 22,000 | 36,000 | 800 | 400 | 250 |
| Alberta | 20,000 | 22,000 | 38,000 | 700 | 100 | 100 |
| British Columbia | 500 | 1,000 | 1,500 | — | — | — |
| Total, July 31, 1973(1) | 115,000 | 65,000 | 88,000 | 1,600 | 600 | 400 |
| Total, July 31, 1972 ... | 311,500 ^r | 96,000 | 106,000 | 5,500 | 6,000 | 16,300 |

Since the bulk of farm stocks of grain is held in Western Canada, stocks in the Prairie Provinces have been segregated from the above table for ease in comparison with last year's totals.

Estimated Farm Stocks in the Prairie Provinces, July 31, 1973 and 1972

| Province | Wheat | Oats | Barley | Rye | Flax-seed | Rape-seed |
|--------------------------|----------------------|--------|--------|-------|-----------|-----------|
| thousand bushels | | | | | | |
| Manitoba | 5,000 | 8,000 | 8,000 | 100 | 100 | 50 |
| Saskatchewan | 85,000 | 22,000 | 36,000 | 800 | 400 | 250 |
| Alberta | 20,000 | 22,000 | 38,000 | 700 | 100 | 100 |
| Total, July 31, 1973(1) | 110,000 | 52,000 | 82,000 | 1,600 | 600 | 400 |
| Total, July 31, 1972 ... | 308,000 ^r | 78,000 | 96,000 | 5,500 | 6,000 | 16,300 |

(1) Subject to revision.

Carryover Stocks of
Canadian Grain at
July 31, 1973

Total carryover stocks of the six major Canadian grains in all North American positions at July 31, 1973 were estimated at 676.6 million bushels, 30 per cent below last year's revised total of 972.8 million. Decreases occurred in stocks in each of the six grains as compared with 1972.

Total stocks of Canadian wheat were estimated at 366.1 million bushels, compared with last year's revised estimate of 583.8 million bushels. Stocks of oats in all positions, estimated at 79.7 million bushels, were 33 per cent smaller than last year's 118.3 million. Barley stocks, at 192.7 million bushels, were down 2 per cent from the 195.8 million held in 1972. Carryover stocks of rye in all positions, estimated at 10.2 million bushels, were down 35 per cent from last year's 15.8 million. July-end carryover stocks of flaxseed at 7.8 million bushels were 51 per cent below last year's 16.0 million and rapeseed, at 20.1 million bushels, was sharply below last year's figure of 43.1 million.

Stocks of Canadian Grain at July 31, 1973

| Position | Wheat | Oats | Barley | Rye | Flax- seed | Rape- seed |
|--|---------|---------|---------|--------|---------------|---------------|
| thousand bushels | | | | | | |
| <u>In Canada</u> | | | | | | |
| On farms | 115,000 | 65,000 | 88,000 | 1,600 | 600 | 400 |
| Primary elevators(1) | 141,387 | 8,309 | 64,792 | 4,842 | 2,826 | 9,211 |
| Process elevators | 4,014 | 191 | 2,681 | 104 | 43 | 564 |
| Interior terminals | 552 | 120 | 4,110 | — | 212 | 277 |
| Vancouver-New Westminster | 6,198 | 6 | 2,464 | 602 | 533 | 2,841 |
| Victoria | 296 | — | — | — | — | — |
| Prince Rupert | 765 | — | — | — | — | — |
| Churchill | 2,462 | 46 | 1,207 | — | — | — |
| Thunder Bay | 30,003 | 2,076 | 16,426 | 2,045 | 2,343 | 3,824 |
| In transit rail: | | | | | | |
| Western division | 23,396 | 1,073 | 6,441 | 700 | 1,054 | 2,985 |
| Eastern division | 381 | 543 | 124 | — | — | — |
| In transit lake | 11,635 | 132 | 2,103 | — | 147 | — |
| Eastern transfer elevators | 26,906 | 2,035 | 4,307 | 311 | 68 | 8 |
| Eastern mills(1) | 2,507 | 128 | — | — | — | — |
| Western mills(1) | 558 | — | 2 | 2 | — | — |
| Total in Canada(1) | 366,060 | 79,659 | 192,657 | 10,206 | 7,826 | 20,110 |
| In United States | — | — | — | — | — | — |
| Total Canadian grain in Canada and United States, July 31, 1973(1) | 366,060 | 79,659 | 192,657 | 10,206 | 7,826 | 20,110 |
| <u>Comparative stocks, July 31, 1972^r</u> | | | | | | |
| In Canada | 583,757 | 118,257 | 195,843 | 15,796 | 16,032 | 43,139 |
| In United States | — | — | — | — | — | — |
| Total, Canada and United States | 583,757 | 118,257 | 195,843 | 15,796 | 16,032 | 43,139 |
| Average stocks, July 31, 1963-72 | 630,052 | 128,734 | 139,628 | 9,389 | 9,885 | — |

(1) Preliminary revised — subject to further revision.

Carryover of Canadian Oats,
Barley, Rye, Flaxseed and
Rapeseed 1942-73

Total carryover stocks of Canadian oats, barley, rye, flaxseed and rapeseed in all North American positions (excluding Newfoundland for which data are not available) at July 31, 1973 were estimated at some 310.5 million bushels compared with last year's revised estimate of

389.1 million. Carryover stocks of oats at the end of the 1972-73 crop year were estimated at 79.7 million bushels, 33 per cent smaller than last year's 118.3 million and barley stocks, at 192.7 million bushels were down 2 per cent from the 195.8 million held in 1972. Stocks of rye, at 10.2 million bushels decreased by 35 per cent from the 15.8 million of last year and flaxseed stocks at 7.8 million bushels were 51 per cent less than last year's corresponding figure of 16.0 million. Rapeseed stocks, at 20.1 million were in sharp contrast to the 1972 figure of 43.1 million bushels.

Carryover of Canadian Oats, Barley, Rye, Flaxseed and Rapeseed, July 31, 1942-73

| Year | Oats | Barley | Rye | Flaxseed | Rapeseed(1) |
|-------------------------------|---------|---------|--------|----------|-------------|
| thousand bushels | | | | | |
| 1942 | 28,607 | 10,821 | 3,353 | 1,027 | |
| 1943 | 149,341 | 69,279 | 15,268 | 3,740 | |
| 1944 | 108,479 | 45,949 | 5,594 | 3,649 | |
| 1945 | 98,255 | 28,919 | 2,024 | 2,932 | |
| 1946 | 77,492 | 29,937 | 768 | 1,649 | |
| 1947 | 69,484 | 28,764 | 755 | 797 | |
| 1948 | 47,891 | 31,449 | 904 | 3,371 | |
| 1949 | 60,507 | 29,669 | 11,918 | 10,692 | |
| 1950 | 44,905 | 20,355 | 6,431 | 4,468 | |
| 1951 | 95,177 | 53,496 | 3,299 | 1,204 | |
| 10-year average 1942-51 | 78,014 | 34,864 | 5,031 | 3,353 | |
| 1952 | 108,358 | 79,504 | 8,774 | 2,906 | |
| 1953 | 144,409 | 111,667 | 17,541 | 4,301 | |
| 1954 | 125,769 | 145,910 | 22,235 | 3,490 | |
| 1955 | 83,967 | 91,488 | 19,935 | 2,587 | |
| 1956 | 119,106 | 110,948 | 15,763 | 2,997 | |
| 1957 | 211,215 | 142,779 | 12,160 | 7,581 | |
| 1958 | 156,915 | 118,165 | 10,062 | 5,652 | |
| 1959 | 129,979 | 131,153 | 8,420 | 6,523 | |
| 1960 | 100,827 | 128,470 | 6,753 | 4,824 | |
| 1961 | 115,154 | 112,557 | 7,417 | 7,580 | |
| 10-year average 1952-61 | 129,570 | 117,264 | 13,003 | 4,844 | |
| 1962 | 79,066 | 57,824 | 3,789 | 5,269 | |
| 1963 | 150,278 | 89,245 | 4,159 | 3,988 | |
| 1964 | 179,408 | 118,270 | 7,052 | 6,551 | |
| 1965 | 130,121 | 88,776 | 8,502 | 7,141 | 1,318 |
| 1966 | 127,163 | 97,753 | 10,567 | 11,141 | 3,148 |
| 1967 | 109,791 | 131,751 | 8,295 | 11,831 | 5,827 |
| 1968 | 76,951 | 130,917 | 7,458 | 4,678 | 9,923 |
| 1969 | 128,657 | 199,383 | 8,673 | 4,909 | 5,069 |
| 1970 | 141,340 | 200,078 | 10,647 | 5,970 | 3,639 |
| 1971 | 125,373 | 144,269 | 12,743 | 26,606 | 11,029 |
| 10-year average 1962-71 | 124,815 | 125,827 | 8,189 | 8,808 | |
| 1972 ^r | 118,257 | 195,843 | 15,796 | 16,032 | 43,139 |
| 1973 ^p | 79,659 | 192,657 | 10,206 | 7,826 | 20,110 |

(1) Up to July 31, 1968 includes Canadian Wheat Board estimate of farm stocks and from 1969 Statistics Canada's estimates.

Farmers' Marketings
of Oats, Barley and Rye

Total marketing's of oats, barley and rye in the Prairie Provinces during the crop year 1972-73 amounted to 276.3 million bushels, 20 per cent less than the comparable 1971-72 crop year figure of 343.3 million and sharply above the ten-year (1961-62 - 1970-71) average of 161.7 million bushels. Deliveries of barley, at 234.6 million accounted for 85 per cent of the crop year total; oats, at 32.5 million (12 per cent); and rye, 9.3 million bushels (3 per cent).

Farmers' Marketings(1) of Oats, Barley and Rye in the Prairie Provinces, 1972-73 with Comparisons

| Period or week ending | Oats | | | | Barley | | | |
|---|--------|--------|--------|--------|--------|---------|--------|---------|
| | Man. | Sask. | Alta. | Total | Man. | Sask. | Alta. | Total |
| thousand bushels | | | | | | | | |
| August 1, 1972 - May 16, 1973 | 11,197 | 6,579 | 7,050 | 24,827 | 36,141 | 67,985 | 63,580 | 167,706 |
| May 23 | 35 | 28 | 100 | 163 | 303 | 730 | 971 | 2,003 |
| 30 | 26 | 28 | 102 | 156 | 274 | 679 | 757 | 1,710 |
| June 6 | 45 | 48 | 120 | 214 | 304 | 870 | 833 | 2,007 |
| 13 | 100 | 81 | 142 | 322 | 811 | 1,797 | 1,155 | 3,763 |
| 23 | 112 | 89 | 178 | 379 | 985 | 1,937 | 1,350 | 4,273 |
| 27 | 89 | 94 | 143 | 325 | 898 | 2,076 | 1,364 | 4,338 |
| July 4 | 146 | 115 | 157 | 419 | 1,006 | 1,729 | 1,232 | 3,966 |
| 11 | 121 | 154 | 150 | 436 | 1,139 | 2,412 | 1,183 | 4,734 |
| 18 | 207 | 112 | 161 | 480 | 1,333 | 2,594 | 1,595 | 5,522 |
| 25 | 480 | 307 | 284 | 1,070 | 2,684 | 4,913 | 2,924 | 10,521 |
| 31 | 1,674 | 808 | 1,186 | 3,669 | 5,278 | 9,786 | 9,000 | 24,064 |
| Total | 14,233 | 8,443 | 9,784 | 32,460 | 51,155 | 97,508 | 85,944 | 234,607 |
| 1971-72 crop year ^r | 12,905 | 11,870 | 7,550 | 32,326 | 54,783 | 152,015 | 88,668 | 295,467 |
| 10-year average: 1961-62 - 1970-71 | 15,396 | 15,007 | 13,552 | 44,955 | 14,636 | 37,301 | 55,738 | 108,674 |

| Rye | | | | |
|---|-------|-------|-------|--------|
| thousand bushels | | | | |
| August 1, 1972 - May 16, 1973 | 868 | 2,431 | 1,935 | 5,234 |
| May 23 | 11 | 10 | 18 | 38 |
| 30 | 37 | 62 | 47 | 146 |
| June 6 | 40 | 307 | 124 | 471 |
| 13 | 31 | 168 | 86 | 285 |
| 23 | 47 | 144 | 63 | 253 |
| 27 | 57 | 192 | 112 | 361 |
| July 4 | 50 | 259 | 100 | 409 |
| 11 | 44 | 138 | 65 | 277 |
| 18 | 49 | 138 | 84 | 271 |
| 25 | 36 | 191 | 115 | 342 |
| 31 | 87 | 581 | 517 | 1,185 |
| Total | 1,357 | 4,649 | 3,265 | 9,271 |
| 1971-72 crop year ^r | 3,202 | 9,008 | 3,322 | 15,531 |
| 10-year average: 1961-62 - 1970-71 | 1,834 | 4,410 | 1,865 | 8,110 |

(1) Includes receipts at primary, process, terminal elevators and platform loadings.

Visible Supply of Canadian Oats, Barley and Rye, August 22, 1973 Compared with
Approximately the Same Date, 1971 and 1972

| Position | 1971 | 1972 | 1973 |
|--|--------|--------|---------|
| thousand bushels | | | |
| <u>OATS</u> | | | |
| Primary elevators — Manitoba | 4,038 | 1,589 | 3,435 |
| Saskatchewan | 9,583 | 3,561 | 2,110 |
| Alberta | 9,625 | 5,180 | 3,106 |
| Sub-total | 23,246 | 10,330 | 8,651 |
| Process elevators | 493 | 111 | 207 |
| Interior terminals | 23 | 20 | 120 |
| Vancouver-New Westminster | 7 | 3 | 6 |
| Churchill | 5 | 29 | — |
| Thunder Bay | 5,631 | 4,672 | 1,504 |
| In transit rail (western division) | 4,663 | 2,047 | 1,182 |
| Bay, Lake and Upper St. Lawrence ports | 887 | 1,004 | 1,171 |
| Lower St. Lawrence and Maritime ports | 828 | 1,123 | 764 |
| In transit lake | 404 | 1,244 | 457 |
| In transit rail (eastern division) | 61 | 330 | 541 |
| Total | 36,248 | 20,913 | 14,603 |
| <u>BARLEY</u> | | | |
| Primary elevators — Manitoba | 3,287 | 2,138 | 13,500 |
| Saskatchewan | 13,792 | 10,883 | 23,381 |
| Alberta | 29,795 | 21,063 | 26,653 |
| Sub-total | 46,874 | 34,084 | 63,534 |
| Process elevators | 2,455 | 2,197 | 2,252 |
| Interior terminals | 445 | 5,169 | 3,369 |
| Vancouver-New Westminster | 2,076 | 2,730 | 1,716 |
| Victoria | 3 | 5 | — |
| Churchill | 1,556 | 1,529 | 947 |
| Thunder Bay | 6,503 | 16,833 | 10,328 |
| In transit rail (western division) | 2,791 | 4,151 | 5,556 |
| Bay, Lake and Upper St. Lawrence ports | 1,349 | 1,047 | 939 |
| Lower St. Lawrence and Maritime ports | 5,809 | 10,631 | 7,257 |
| In transit lake | 4,599 | 3,924 | 4,682 |
| In transit rail (eastern division) | — | 9 | 124 |
| Total | 74,460 | 82,309 | 100,704 |
| <u>RYE</u> | | | |
| Primary elevators — Manitoba | 781 | 623 | 883 |
| Saskatchewan | 2,380 | 3,829 | 3,475 |
| Alberta | 902 | 1,743 | 1,685 |
| Sub-total | 4,063 | 6,195 | 6,043 |
| Process elevators | 31 | 48 | 106 |
| Interior terminals | — | 2 | — |
| Vancouver-New Westminster | 1,166 | 660 | 771 |
| Prince Rupert | — | 1 | — |
| Thunder Bay | 1,692 | 2,245 | 2,215 |
| In transit rail (western division) | 382 | 1,025 | 891 |
| Bay, Lake and Upper St. Lawrence ports | 302 | 255 | 343 |
| Lower St. Lawrence and Maritime ports | 187 | 60 | 149 |
| United States ports | 142 | — | — |
| Total | 7,965 | 10,491 | 10,518 |

Grading of Crops, 1972-73 The total number of cars of oats, barley and rye inspected by the Canadian Grain Commission during the 1972-73 crop year amounted to 101,307 cars, 28 per cent below the 140,408 cars of these grains inspected during the comparable 1971-72 crop year. Inspection of barley, at 84,995 cars accounted for 84 per cent of the August 1972 - July 1973 total, with the remainder consisting of 11,411 cars of oats (11 per cent); and 4,901 cars of rye (5 per cent).

The quality of the 1972-73 inspections for oats and barley has been below the previous years' levels but above the recent five-year average, while rye showed an increase over both the previous year and the average. Percentages of the three grains falling into the higher grades (excluding "Toughs" and "Damps") during the 1972-73 crop year with comparable data for 1971-72 and the five-year August - July (1966-67 - 1970-71) averages, respectively, in brackets, were as follows: oats, 1 Feed or higher, 92.2 (94.2, 82.6); barley, 1 Feed or higher, 84.6 (89.0, 74.0); and rye, 3 C.W. or higher, 95.0 (94.4, 85.4).

Grading of Oats, Barley and Rye Inspected(1) August-July 1972-73
with Comparisons

| Grain and grade | Crop year | | | | |
|-----------------------|--------------------------------|---------|----------|---------|----------|
| | Average | 1971-72 | | 1972-73 | |
| | 1966-67 1970-71 per cent | cars | per cent | cars | per cent |
| <u>OATS</u> | | | | | |
| 2 C.W. | 0.4 | 102 | 0.9 | 27 | 0.2 |
| Ex. 3 C.W. | 3.4 | 803 | 7.0 | 164 | 1.4 |
| 3 C.W. | 21.3 | 3,536 | 30.7 | 2,768 | 24.3 |
| Ex. 1 Feed | 14.1 | 1,160 | 10.1 | 1,984 | 17.4 |
| 1 Feed | 43.4 | 5,249 | 45.5 | 5,581 | 48.9 |
| 2 Feed | 4.7 | 452 | 3.9 | 545 | 4.8 |
| 3 Feed | 1.0 | 51 | 0.4 | 106 | 0.9 |
| Mixed Feed(3) | 0.5 | 48 | 0.4 | 60 | 0.5 |
| Tough(3, 4) | 8.9 | 67 | 0.6 | 89 | 0.8 |
| Damp(3, 5) | 0.8 | — | — | 1 | (2) |
| Rejected(3) | 0.6 | 30 | 0.3 | 32 | 0.3 |
| All Others | 0.7 | 33 | 0.3 | 54 | 0.5 |
| Total | 100.0 | 11,531 | 100.0 | 11,411 | 100.0 |

Bushel equivalent (approximately) ...

34,670,000

34,802,000

See footnotes at end of table.

Grading of Oats, Barley and Rye Inspected(1), August-July 1972-73
with Comparisons — Concluded

| Grain and grade | Crop year | | | | |
|-----------------------|----------------------------------|---------|----------|---------|----------|
| | Average | 1971-72 | | 1972-73 | |
| | <u>1966-67</u> <u>1970-71</u> | | | | |
| | per cent | cars | per cent | cars | per cent |
| <u>BARLEY</u> | | | | | |
| 1 C.W. Six-Row | — | — | — | 1 | (2) |
| 2 C.W. Six-Row | 1.5 | 644 | 0.5 | 271 | 0.3 |
| 3 C.W. Six-Row | 13.6 | 15,577 | 12.7 | 9,151 | 10.7 |
| 1 C.W. Two-Row | — | 3 | (2) | — | — |
| 2 C.W. Two-Row | 0.8 | 1,209 | 1.0 | 195 | 0.2 |
| 3 C.W. Two-Row | 5.0 | 7,407 | 6.0 | 6,776 | 8.0 |
| 1 Feed | 53.1 | 84,760 | 68.8 | 55,594 | 65.4 |
| 2 Feed | 12.6 | 9,855 | 8.0 | 4,530 | 5.3 |
| 3 Feed | 1.3 | 834 | 0.7 | 417 | 0.5 |
| Tough(3, 6) | 10.1 | 2,668 | 2.2 | 7,808 | 9.2 |
| Damp(3, 5) | 1.4 | 98 | 0.1 | 172 | 0.2 |
| Rejected(3) | 0.4 | 74 | 0.1 | 59 | 0.1 |
| All Others | 0.1 | 38 | (2) | 21 | (2) |
| Total | 100.0 | 123,167 | 100.0 | 84,995 | 100.0 |

Bushel equivalent (approximately) .. 297,217,000 209,408,000

| | | | | | |
|-------------------|-------|-------|-------|-------|-------|
| <u>RYE</u> | | | | | |
| 1 C.W. | 0.4 | — | — | 11 | 0.2 |
| 2 C.W. | 47.8 | 2,476 | 43.4 | 2,447 | 49.9 |
| 3 C.W. | 37.2 | 2,914 | 51.0 | 2,199 | 44.9 |
| 4 C.W. | 3.2 | 103 | 1.8 | 86 | 1.8 |
| Ergoty | 2.3 | 120 | 2.1 | 66 | 1.3 |
| Tough(3, 4) | 8.7 | 86 | 1.5 | 73 | 1.5 |
| Damp(3, 5) | 0.2 | 5 | 0.1 | 1 | (2) |
| Rejected(3) | 0.1 | 4 | 0.1 | 17 | 0.3 |
| All Others | 0.1 | 2 | (2) | 1 | (2) |
| Total | 100.0 | 5,710 | 100.0 | 4,901 | 100.0 |

Bushel equivalent (approximately) .. 11,840,000 10,662,000

- (1) Both old and new crop.
(2) Less than .05 per cent.
(3) All grades.
(4) Moisture content 14.1 per cent to 17.0 per cent.
(5) Moisture content over 17.1 per cent.
(6) Moisture content 14.9 per cent to 17 per cent.

Lake Shipments
from Thunder Bay

Total shipments of the **six** major grains out of Lakehead terminals from the opening of navigation to July 31, 1973 amounted to 204.1 million bushels, 21 per cent less than the 259.3 million at the comparable date in 1972. In 1973 the season of navigation opened on March 30 while the 1972 season opened on April 14. Shipments of wheat, at 138.2 million bushels accounted for 68 per cent of the total while oats, at 7.9 million and barley, at 45.5 million accounted for 4 per cent and 22 per cent, respectively, of the 1973 total. The remainder of the shipments consisted of 0.7 million bushels of rye, 5.9 million of flaxseed, and 6.0 million of rapeseed.

Lake Shipments of Canadian Grain from the Opening of Navigation to July 31, 1973
and to Approximately the Same Date, 1962-72

| Year | Wheat | Oats | Barley | Rye | Flaxseed | Rapeseed | Total |
|------------------|---------|--------|--------|-------|----------|----------|---------|
| thousand bushels | | | | | | | |
| 1962 | 65,652 | 7,163 | 11,305 | 1,176 | 2,942 | — | 88,238 |
| 1963 | 83,960 | 20,032 | 10,832 | 1,548 | 3,189 | — | 119,561 |
| 1964 | 180,295 | 12,224 | 15,054 | 2,215 | 4,475 | — | 214,262 |
| 1965 | 108,207 | 22,595 | 15,535 | 2,072 | 4,981 | 559 | 153,949 |
| 1966 | 179,606 | 14,118 | 17,705 | 3,994 | 6,645 | 555 | 222,624 |
| 1967 | 142,876 | 16,898 | 38,648 | 2,745 | 4,634 | 816 | 206,617 |
| 1968(1) | 77,196 | 7,968 | 8,764 | 567 | 2,930 | 255 | 97,681 |
| 1969 | 74,820 | 7,240 | 18,507 | 939 | 3,891 | 760 | 106,158 |
| 1970 | 121,118 | 12,306 | 55,571 | 1,820 | 6,465 | 2,987 | 200,267 |
| 1971 | 130,671 | 11,996 | 66,660 | 2,086 | 8,401 | 9,241 | 229,054 |
| 1972 | 134,344 | 12,313 | 95,444 | 2,347 | 7,072 | 7,752 | 259,272 |
| 1973 | 138,161 | 7,903 | 45,460 | 700 | 5,904 | 5,994 | 204,122 |

(1) Reports indicate that no grain moved down the Great Lakes from July 18 to July 31 1968, due to the Lakehead strike.

Rail Shipments
from Thunder Bay

Rail movement of wheat, oats, barley, rye, flaxseed and rapeseed from the Lakehead during the 1972-73 crop year amounted to 31.7 million bushels, 11 per cent above the comparable 1971-72 total of 28.5 million.

Rail Shipments of Canadian Grain from Thunder Bay
August - July 1972-73 and 1971-72

| Year | Wheat | Oats | Barley | Rye | Flaxseed | Rapeseed | Total |
|--------------------|-------|--------|--------|-----|----------|----------|--------|
| thousand bushels | | | | | | | |
| August 1971 | 209 | 817 | 208 | 6 | — | — | 1,240 |
| September | 193 | 889 | 230 | 14 | 65 | — | 1,391 |
| October | 97 | 764 | 244 | 9 | — | — | 1,115 |
| November | 313 | 828 | 287 | 13 | 8 | — | 1,449 |
| December | 339 | 1,140 | 481 | 2 | 77 | — | 2,040 |
| January 1972 | 625 | 1,907 | 6,463 | 15 | 136 | — | 9,146 |
| February | 1,027 | 1,568 | 4,301 | 13 | — | — | 6,909 |
| March | 650 | 1,275 | 1,274 | 4 | — | — | 3,204 |
| April | 251 | 887 | 609 | 26 | 16 | — | 1,789 |
| May | 224 | 938 | 479 | 15 | 24 | 17 | 1,695 |
| June | 210 | 379 | 260 | 14 | — | — | 862 |
| July | 256 | 377 | 185 | 2 | — | — | 820 |
| Total | 4,395 | 11,770 | 15,022 | 132 | 325 | 17 | 31,660 |
| Similar period: | | | | | | | |
| 1971-72 | 7,213 | 9,797 | 10,632 | 196 | 574 | 115 | 28,525 |

Shipments Under Feed
Grain Assistance
Regulations

Claims filed for payment for the 1972-73 crop year represent the movement of some 110.3 million bushels of wheat, oats, barley, rye and corn to Eastern Canada and British Columbia under the Livestock Feed Assistance

Act. This total represents an increase of 15 per cent over the 1971-72 shipments of 95.8 million bushels. Shipments of wheat, oats, barley and rye were above those of the previous crop year while corn registered a decline.

The movement of screenings under the Livestock Feed Assistance Act amounted to 113,369 tons in the 1972-73 crop year which is 12 per cent below the 1971-72 figure of 128,302 tons. Shipments of millfeeds, at 392,326 tons were 2 per cent less than the 1971-72 shipments of 401,815 tons.

The bulk of livestock feed shipments went to destinations in Quebec and Ontario with these two provinces accounting for a combined 69 per cent of wheat, 82 per cent of oats, 75 per cent of barley, 100 per cent of rye, and 87 per cent of millfeeds, while Nova Scotia and New Brunswick accounted for 86 per cent of the corn and Nova Scotia and Ontario accounted for 94 per cent of screenings.

Provincial Distribution of Shipments under the Feed Grain Assistance Regulations
Crop Year 1972-73 and 1971-72

| Province | Western | | | | | | Eastern |
|-----------------------|--------------|--------|--------|-----|-----------------|----------------|--------------|
| | Wheat(1) | Oats | Barley | Rye | Screen- ings | Mill- feeds | Corn(2) |
| | '000 bushels | | | | tons | | '000 bushels |
| Newfoundland | 721 | 277 | 389 | — | — | 1,353 | 11 |
| Prince Edward Island | 242 | 380 | 814 | — | 550 | 2,576 | 103 |
| Nova Scotia | 2,913 | 1,582 | 1,955 | — | 8,390 | 10,340 | 573 |
| New Brunswick | 1,371 | 1,181 | 1,335 | — | 1,840 | 5,949 | 347 |
| Quebec | 16,500 | 19,752 | 23,311 | 28 | 3,912 | 189,678 | — |
| Ontario | 5,738 | 10,045 | 7,032 | 74 | 97,685 | 149,814 | — |
| British Columbia | 4,739 | 3,242 | 5,590 | — | 992 | 32,616 | 31 |
| Totals | 32,224 | 36,460 | 40,426 | 102 | 113,369 | 392,326 | 1,064 |
| Same period 1971-72 . | 25,204 | 31,981 | 36,819 | 87 | 128,302 | 401,815 | 1,709 |

(1) Includes shipments of sample feed grains.

(2) Includes Manitoba corn shipped into British Columbia.

Exports of Canadian Oats (1) 1972-73 and 1971-72

| Destination | May 1973 | June 1973 | July 1973 | August - July | |
|--------------------------------|-------------|--------------|--------------|---------------|------------|
| | | | | 1972-73 | 1971-72 |
| bushels | | | | | |
| <u>Western Europe</u> | | | | | |
| EEC: | | | | | |
| Belgium and Luxembourg | — | — | — | 93,640 | — |
| Britain(2) | — | 49,412 | — | 49,412 | — |
| France | 69,178 | — | — | 69,178 | — |
| Germany, West | — | — | — | — | 1,138,288 |
| Italy | — | — | — | — | 2,693,096 |
| Netherlands | 359,931 | — | — | 1,067,516 | 1,557,383 |
| Sub-total | 429,109 | 49,412 | — | 1,279,566 | 5,388,767 |
| <u>Other Western Europe:</u> | | | | | |
| Britain(2) | — | — | — | 76,841 | 355,764 |
| Ireland | — | — | — | 222,646 | 222,024 |
| Switzerland | 65,529 | — | — | 383,741 | 521,084 |
| Sub-total | 65,529 | — | — | 683,228 | 1,098,872 |
| Total | 494,638 | 49,412 | — | 1,962,794 | 6,487,639 |
| <u>Western Hemisphere</u> | | | | | |
| Trinidad and Tobago | — | — | — | — | 30 |
| Venezuela | — | — | 165,694 | 630,779 | 225,479 |
| United States(3) | 239,357 | 190,700 | 229,188 | 4,124,902 | 3,482,737 |
| Total | 239,357 | 190,700 | 394,882 | 4,755,681 | 3,708,246 |
| Sub-total, all countries | 733,995 | 240,112 | 394,882 | 6,718,475 | 10,195,885 |
| Seed oats (4) | 6,224 | — | — | 169,013 | 232,522 |
| Total, all countries | 740,219 | 240,112 | 394,882 | 6,887,488 | 10,428,407 |

- (1) Overseas clearances as reported by the Economics and Statistics Division of the Canadian Grain Commission, for all countries except the United States.
- (2) Commencing January 1, 1973 Britain became a member of the European Economic Community.
- (3) Compiled from returns of Canadian elevator licensees and shippers and advice from American grain correspondents.
- (4) Customs exports.

Exports of Canadian Barley(1) 1972-73 and 1971-72

| Destination | May 1973 | June 1973 | July 1973 | August — July | |
|------------------------------|-------------|--------------|--------------|---------------|------------|
| | | | | 1972-73 | 1971-72 |
| bushels | | | | | |
| <u>Western Europe</u> | | | | | |
| EEC: | | | | | |
| Belgium and Luxembourg | — | — | — | 129,266 | 1,578,065 |
| Britain(2) | 611,333 | — | 504,000 | 1,738,579 | — |
| Germany, West | 562,000 | 131,133 | — | 3,959,800 | 11,591,704 |
| Italy | 4,623,695 | 4,858,835 | 3,641,112 | 44,781,807 | 40,218,287 |
| Netherlands | — | — | — | 642,758 | 3,194,787 |
| Sub-total | 5,797,028 | 4,989,968 | 4,145,112 | 51,252,210 | 56,582,843 |
| <u>Other Western Europe:</u> | | | | | |
| Britain(2) | — | — | — | 9,216,337 | 28,323,147 |
| Iceland | — | — | — | — | 69,767 |
| Ireland | — | — | — | — | 1,033,941 |
| Portugal | — | — | — | 567,000 | 2,388,425 |
| Switzerland | — | — | — | 90,000 | 1,283,058 |
| Sub-total | — | — | — | 9,873,337 | 33,098,338 |
| Total | 5,797,028 | 4,989,968 | 4,145,112 | 61,125,547 | 89,681,181 |
| <u>Eastern Europe</u> | | | | | |
| Germany, East | — | — | — | — | 11,305,042 |
| Hungary | — | — | — | 1,165,733 | — |
| Poland | — | — | — | 1,936,934 | 14,688,046 |
| Roumania | — | — | — | — | 13,334,492 |
| U.S.S.R. (Russia) | 6,403,930 | 7,440,610 | 1,154,082 | 26,476,470 | 21,977,176 |
| Yugoslavia | — | — | — | — | 2,744,981 |
| Total | 6,403,930 | 7,440,610 | 1,154,082 | 29,579,137 | 64,049,737 |

For footnotes see end of table.

Exports of Canadian Barley (1) 1972-73 and 1971-72 - Concluded

| Destination | May 1973 | June 1973 | July 1973 | August - July | |
|---------------------------|-------------|--------------|--------------|---------------|-------------|
| | | | | 1972-73 | 1971-72 |
| bushels | | | | | |
| <u>Africa</u> | | | | | |
| Algeria | — | — | — | — | 2,373,146 |
| Libya | — | — | — | 1,401,507 | 1,153,600 |
| Total | — | — | — | 1,401,507 | 3,526,746 |
| <u>Asia</u> | | | | | |
| Cyprus | — | — | — | 1,042,135 | 275,575 |
| Iran | — | — | — | — | 5,009,808 |
| Iraq | — | — | — | — | 5,989,994 |
| Israel | 1,373,760 | 556,456 | 1,434,467 | 8,187,181 | 8,202,322 |
| Japan | 2,663,480 | 4,773,775 | 4,961,180 | 40,988,262 | 30,798,334 |
| Korea, North | — | — | — | — | 48,226 |
| Korea, South | — | — | — | — | 114,394 |
| Morocco | — | 628,460 | — | 628,460 | — |
| Philippines | — | — | — | — | 269,500 |
| Syria | — | — | — | — | 72,338 |
| Taiwan | — | — | 638,188 | 1,313,385 | 2,208,742 |
| Total | 4,037,240 | 5,958,691 | 7,033,835 | 52,159,423 | 52,989,233 |
| <u>Western Hemisphere</u> | | | | | |
| Ecuador | — | — | — | — | 252,610 |
| Peru | 183,717 | — | 183,717 | 734,868 | 545,207 |
| Venezuela | — | — | — | — | 1,190 |
| United States(3) . | 1,270,365 | 1,087,538 | 336,389 | 11,834,356 | 13,216,946 |
| Total | 1,454,082 | 1,087,538 | 520,106 | 12,569,224 | 14,015,953 |
| Total, all countries | 17,692,280 | 19,476,807 | 12,853,135 | 156,834,838 | 224,262,850 |

- (1) Overseas clearances as reported by the Economics and Statistics Division of the Canadian Grain Commission, for all countries except the United States. Subject to revision.
- (2) Commencing January 1, 1973 Britain became a member of the European Economic Community.
- (3) Compiled from returns of Canadian elevator licensees and shippers and advice from American grain correspondents.

Exports of Canadian Rye (1) 1972-73 and 1971-72

| Destination | May 1973 | June 1973 | July 1973 | August — July | |
|----------------------------|-------------|--------------|--------------|---------------|------------|
| | | | | 1972-73 | 1971-72 |
| bushels | | | | | |
| Western Europe | | | | | |
| EEC: | | | | | |
| Belgium and Luxembourg ... | — | — | — | 186,239 | 38,000 |
| Britain(2) | 21,600 | — | 105,177 | 148,377 | — |
| Germany, West | — | — | — | — | 84,000 |
| Netherlands | — | — | — | 211,984 | 761,991 |
| Sub-total | 21,600 | — | 105,177 | 546,600 | 883,991 |
| Other Western Europe: | | | | | |
| Britain(2) | — | — | — | 370,744 | 1,230,626 |
| Norway | — | — | — | — | 450,477 |
| Sub-total | — | — | — | 370,744 | 1,681,103 |
| Total | 21,600 | — | 105,177 | 917,344 | 2,565,094 |
| Africa | | | | | |
| South Africa | — | — | — | 43,200 | 65,735 |
| Asia | | | | | |
| Hong Kong | — | — | — | 44,000 | — |
| Japan | 525,934 | 257,451 | 393,896 | 6,137,321 | 7,522,279 |
| Philippines | — | — | — | 94,800 | 310,000 |
| Singapore | 95,125 | — | — | 115,125 | — |
| Total | 621,059 | 257,451 | 393,896 | 6,391,246 | 7,832,279 |
| Oceania | | | | | |
| Australia | 14,400 | — | 14,400 | 86,400 | — |
| Western Hemisphere | | | | | |
| Chile | — | — | — | 797,600 | — |
| United States(3) | — | — | — | — | 294,221 |
| Total | — | — | — | 797,600 | 294,221 |
| Total, all countries | 657,059 | 257,451 | 513,473 | 8,235,790 | 10,757,329 |

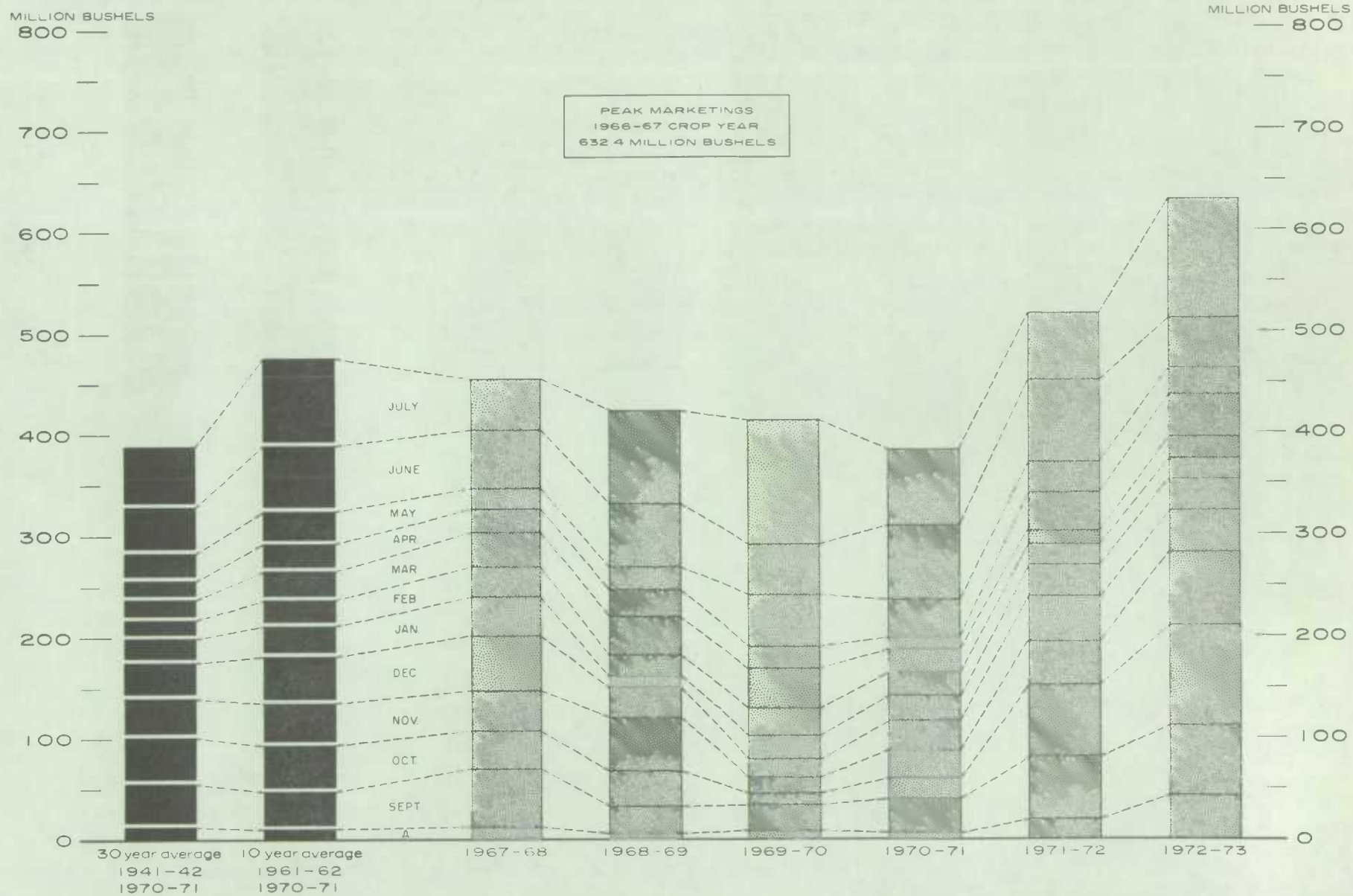
- (1) Overseas clearances as reported by the Economics and Statistics Division of the Canadian Grain Commission, for all countries except the United States. Subject to revision.
- (2) Commencing January 1, 1973 Britain became a member of the European Economic Community.
- (3) Compiled from returns of Canadian elevator licensees and shippers and advice from American grain correspondents.

Customs Exports of Canadian Oatmeal and Rolled Oats (1) 1972-73 and 1971-72

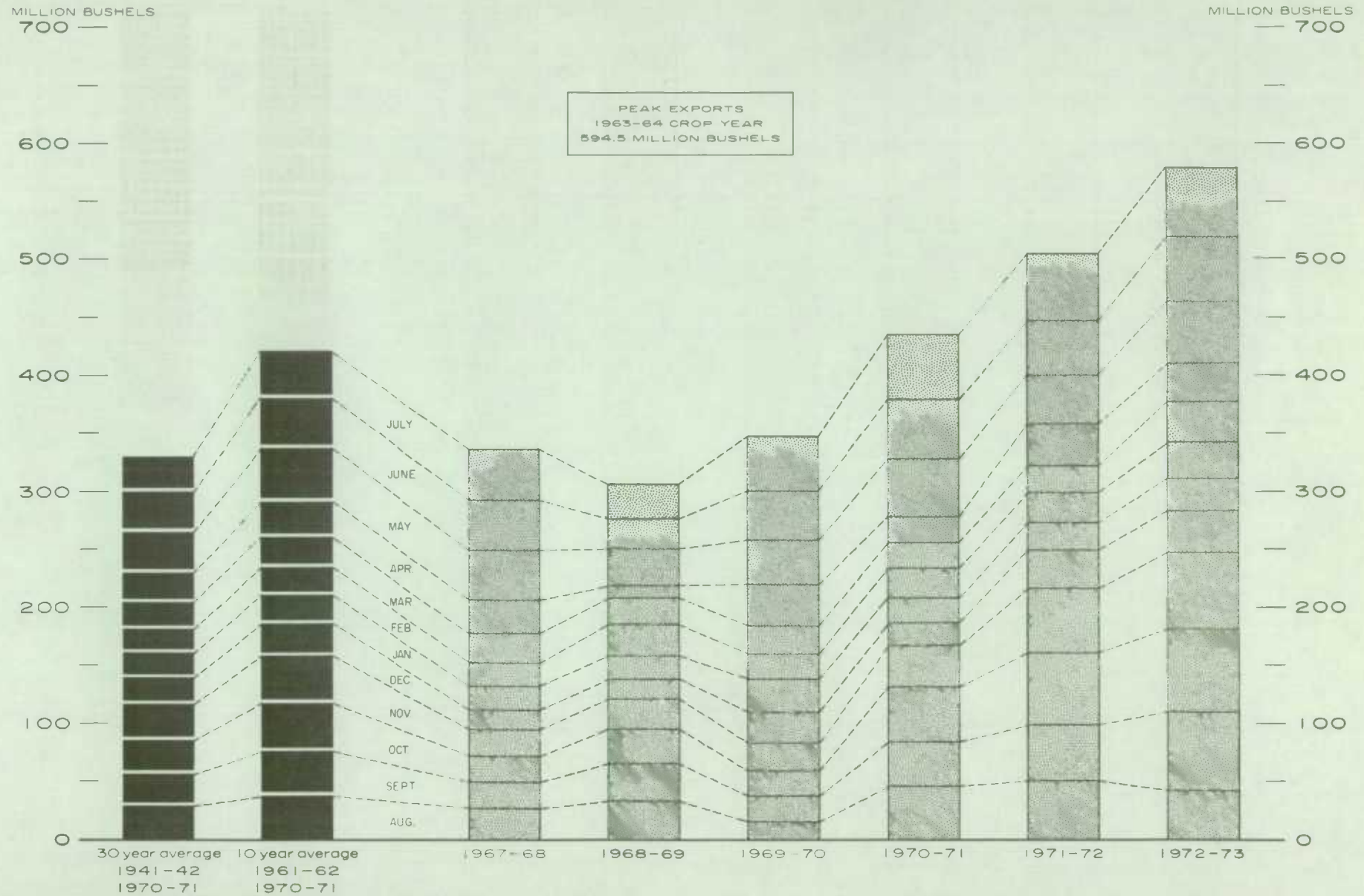
| Destination | May 1973 | June 1973 | July 1973 | August-July | |
|---------------------------|-------------|--------------|--------------|-------------|---------|
| | | | | 1972-73 | 1971-72 |
| bushels | | | | | |
| <u>Western Europe</u> | | | | | |
| EEC: | | | | | |
| Belgium and Luxembourg | — | — | — | 131 | 131 |
| Germany, West | — | — | — | 372 | 793 |
| Total | — | — | — | 503 | 924 |
| <u>Africa</u> | | | | | |
| Liberia | — | — | — | 6 | — |
| <u>Asia</u> | | | | | |
| Malaysia | — | — | — | — | 82 |
| Thailand | — | — | — | 87 | — |
| Total | — | — | — | 87 | 82 |
| <u>Western Hemisphere</u> | | | | | |
| Bahamas | 224 | — | — | 951 | 1,060 |
| Barbados | — | — | 66 | 815 | 5,442 |
| Bermuda | 33 | 153 | 126 | 2,235 | 1,377 |
| Dominican Republic | — | — | — | — | 3,279 |
| Guyana | — | — | 55 | 55 | — |
| Haiti | — | — | — | — | 82 |
| Leeward and Windward Is. | 606 | — | 743 | 6,486 | 8,219 |
| St. Pierre and Miquelon | — | — | — | 82 | 158 |
| Trinidad and Tobago ... | — | — | 38 | 141 | 163 |
| United States | 9,885 | 13,181 | — | 27,071 | 4,372 |
| Total | 10,748 | 13,334 | 1,028 | 37,836 | 24,152 |
| Total, all countries | 10,748 | 13,334 | 1,028 | 38,432 | 25,158 |

(1) In terms of oats equivalent. Conversion rate: 1 bushel of oats equals 18.3 pounds of oatmeal and rolled oats.

FARMERS' MARKETINGS OF WHEAT, PRAIRIE PROVINCES (SPECIFIED PERIODS)



EXPORTS OF CANADIAN WHEAT* AND WHEAT FLOUR** (SPECIFIED PERIODS)

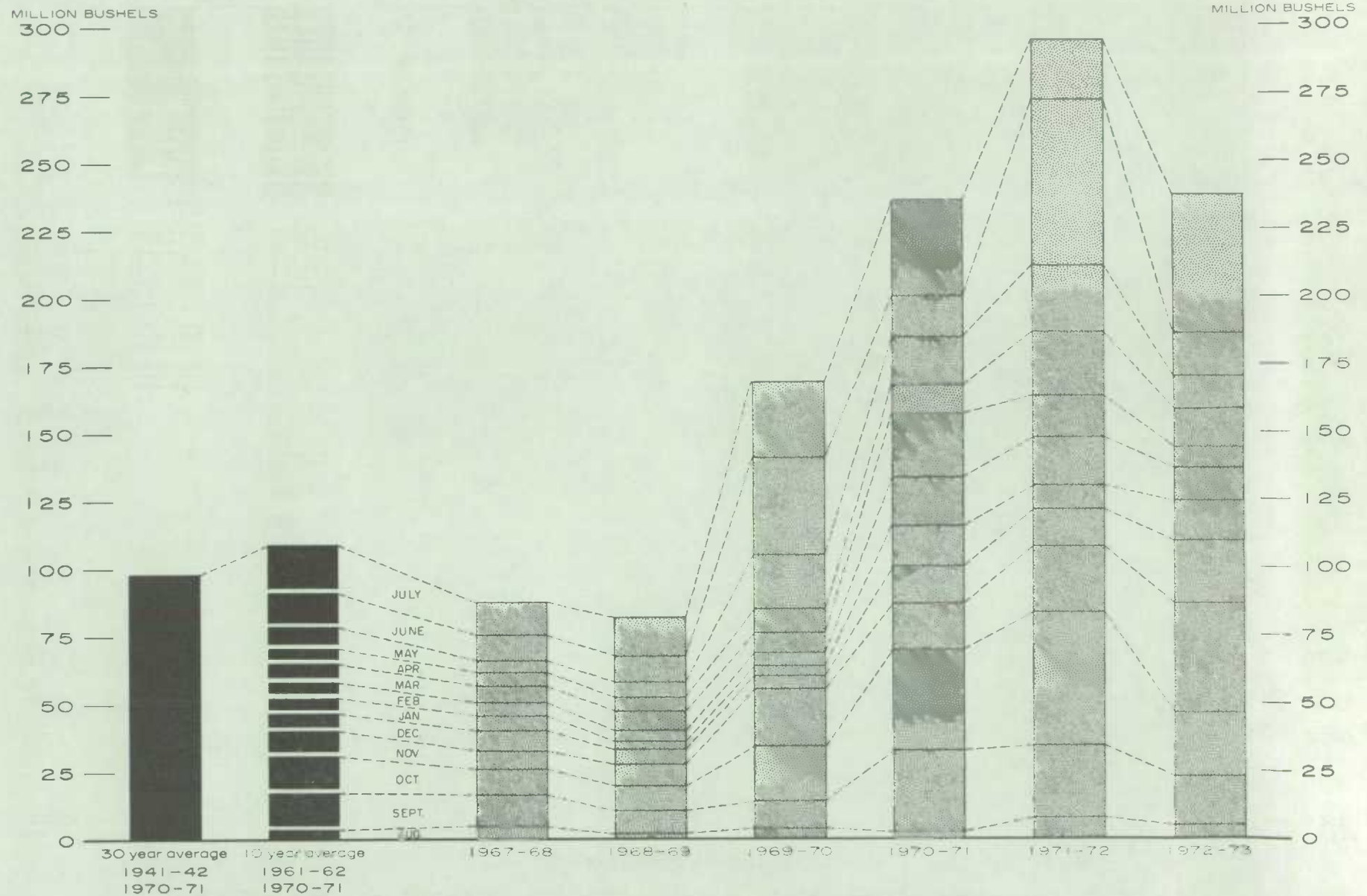


*Beginning with 1955-56 includes seed wheat.

**In terms of wheat equivalent.

Agriculture Division, Statistics Canada

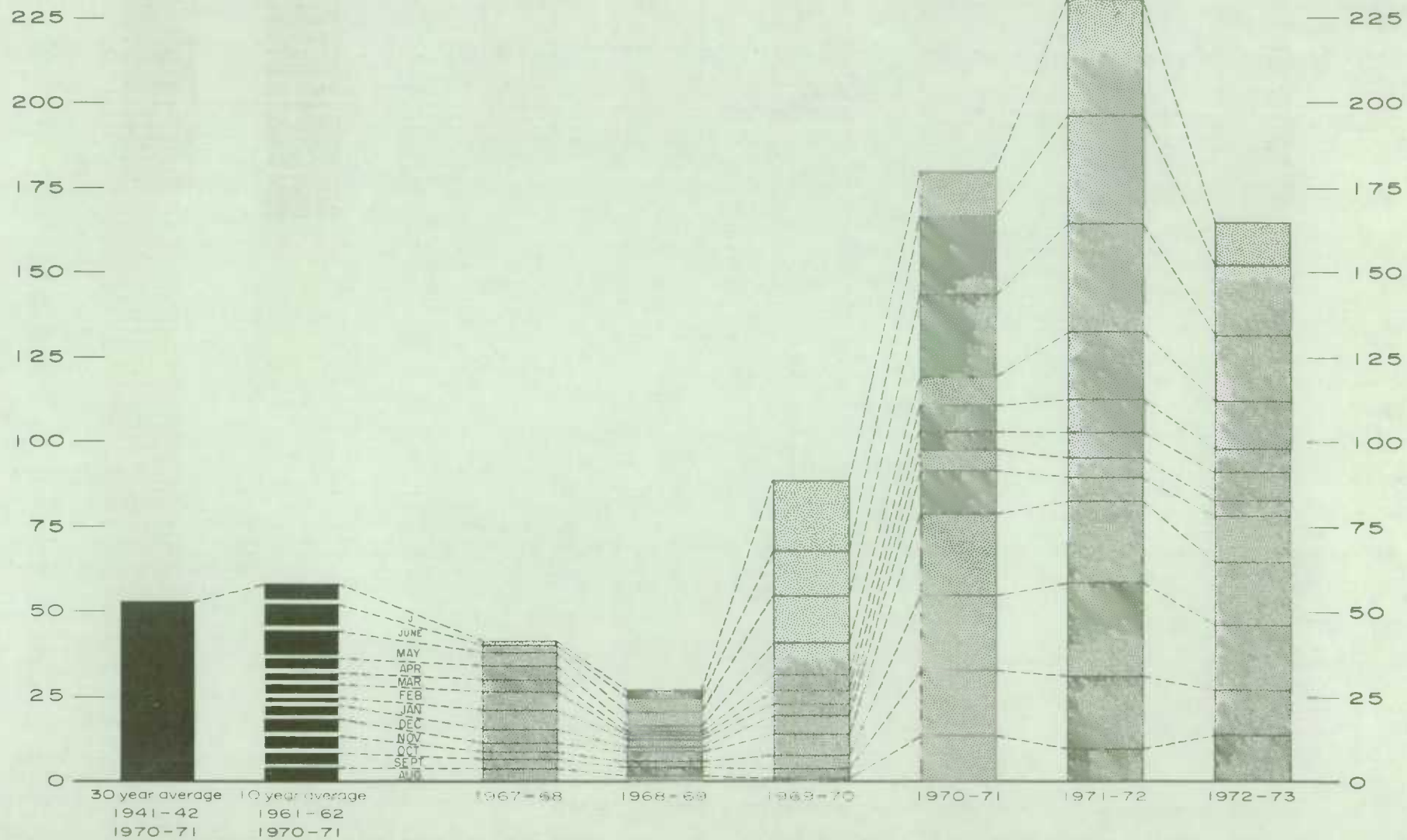
FARMERS' MARKETINGS OF BARLEY, PRAIRIE PROVINCES (SPECIFIED PERIODS)



EXPORTS OF CANADIAN BARLEY AND BARLEY PRODUCTS* (SPECIFIED PERIODS)

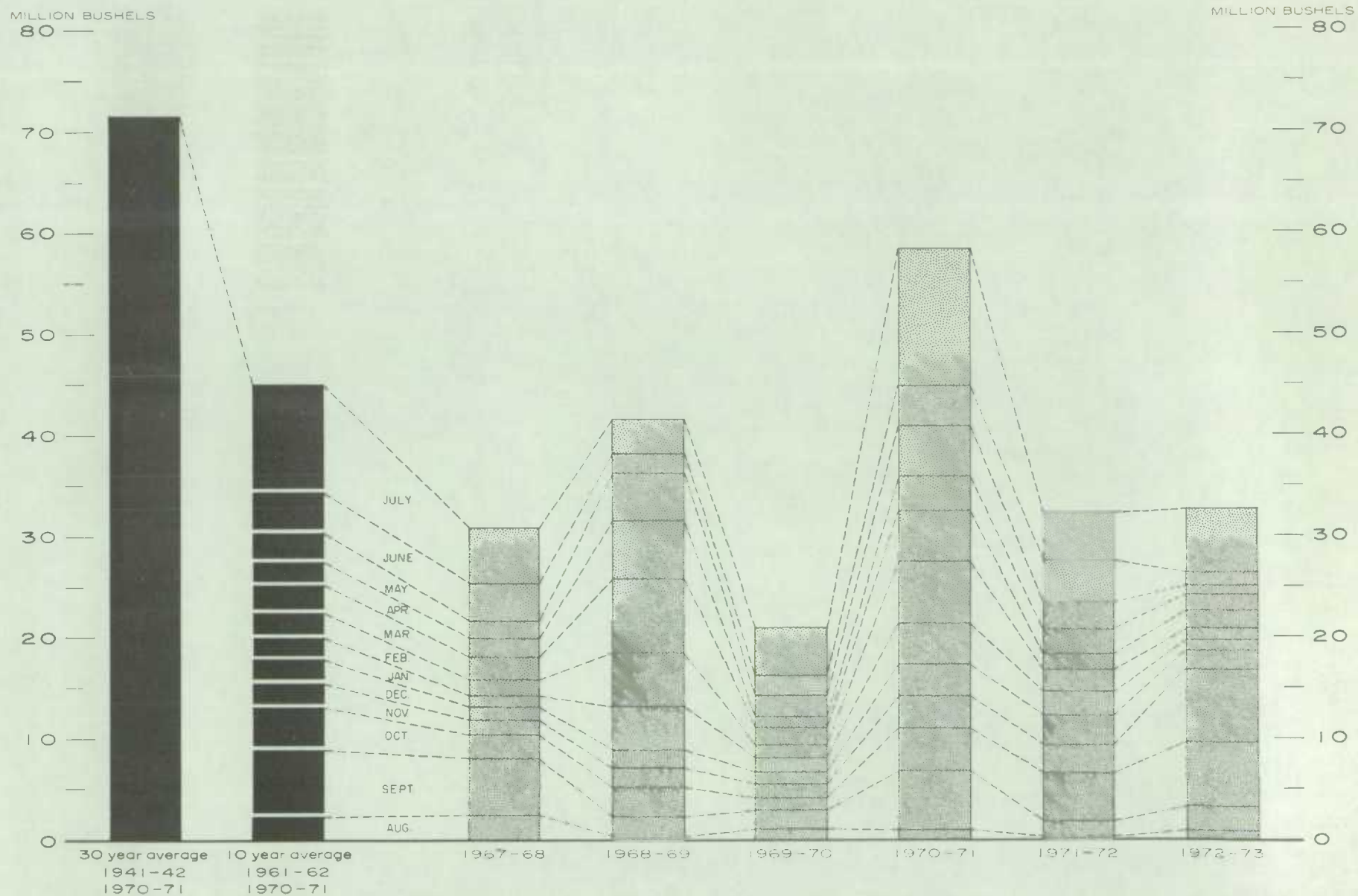
MILLION BUSHELS
250 —

MILLION BUSHELS
— 250



*In terms of grain equivalent.

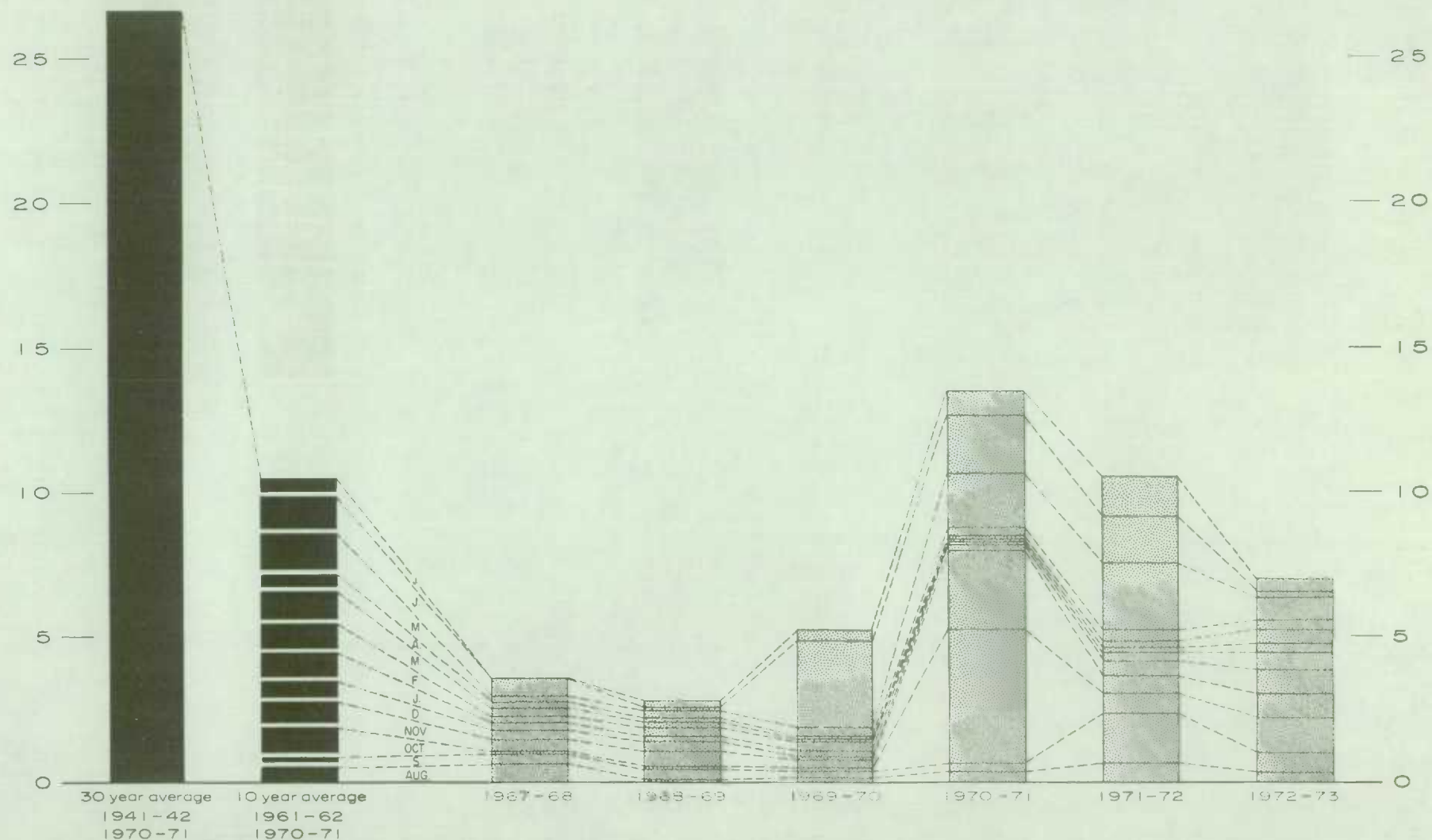
FARMERS' MARKETINGS OF OATS, PRAIRIE PROVINCES (SPECIFIED PERIODS)



EXPORTS OF CANADIAN OATS* AND OAT PRODUCTS** (SPECIFIED PERIODS)

MILLION BUSHEL
30 —

MILLION BUSHEL
30 —



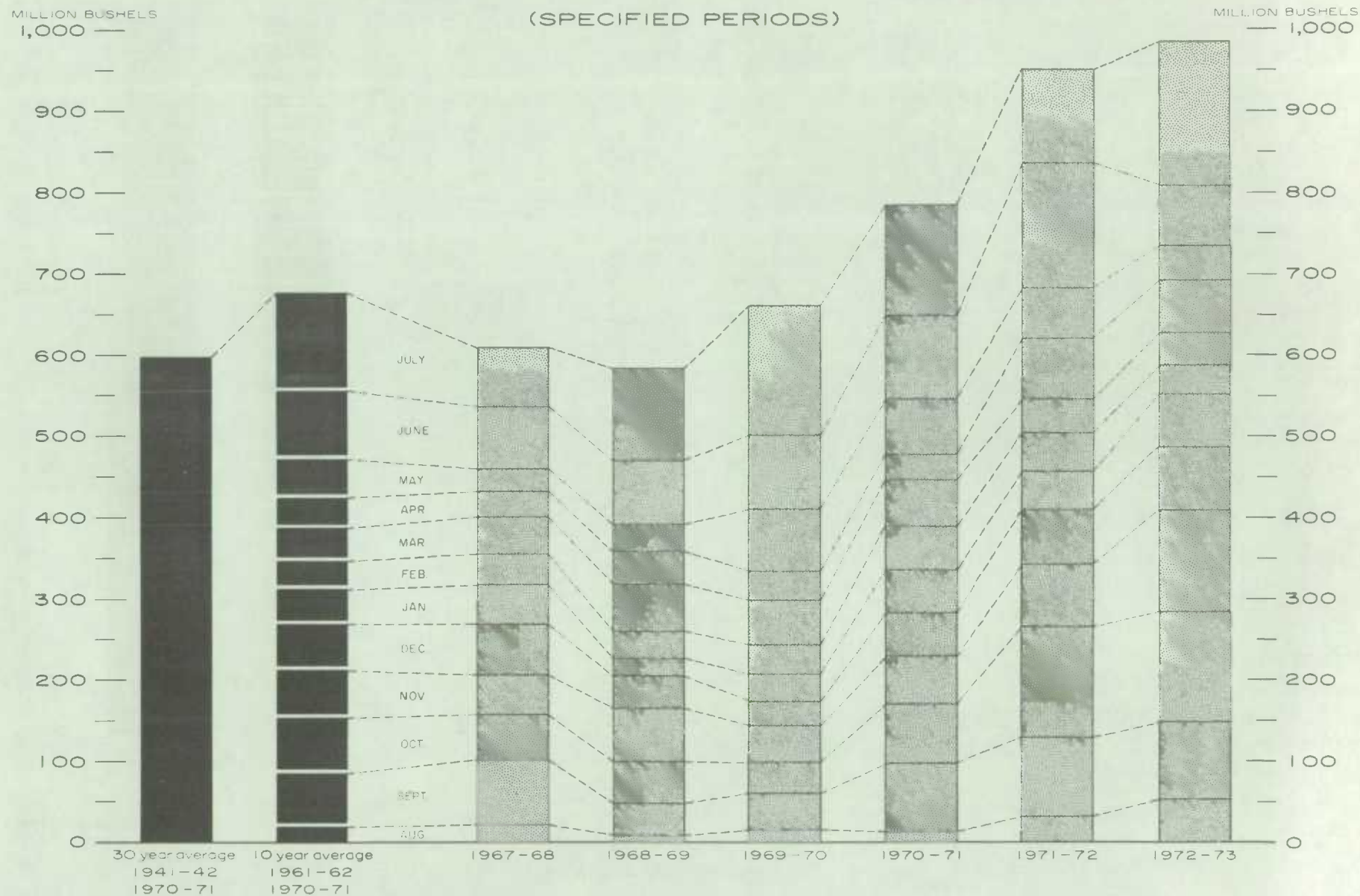
*Beginning with 1960-61 includes relatively small quantity of seed oats.

**In terms of grain equivalent.

Agriculture Division, Statistics Canada

FARMERS' MARKETINGS OF CANADA'S SIX MAJOR GRAINS*, PRAIRIE PROVINCES

(SPECIFIED PERIODS)



*Wheat, oats, barley, rye, flaxseed and from 1960-61 rapeseed

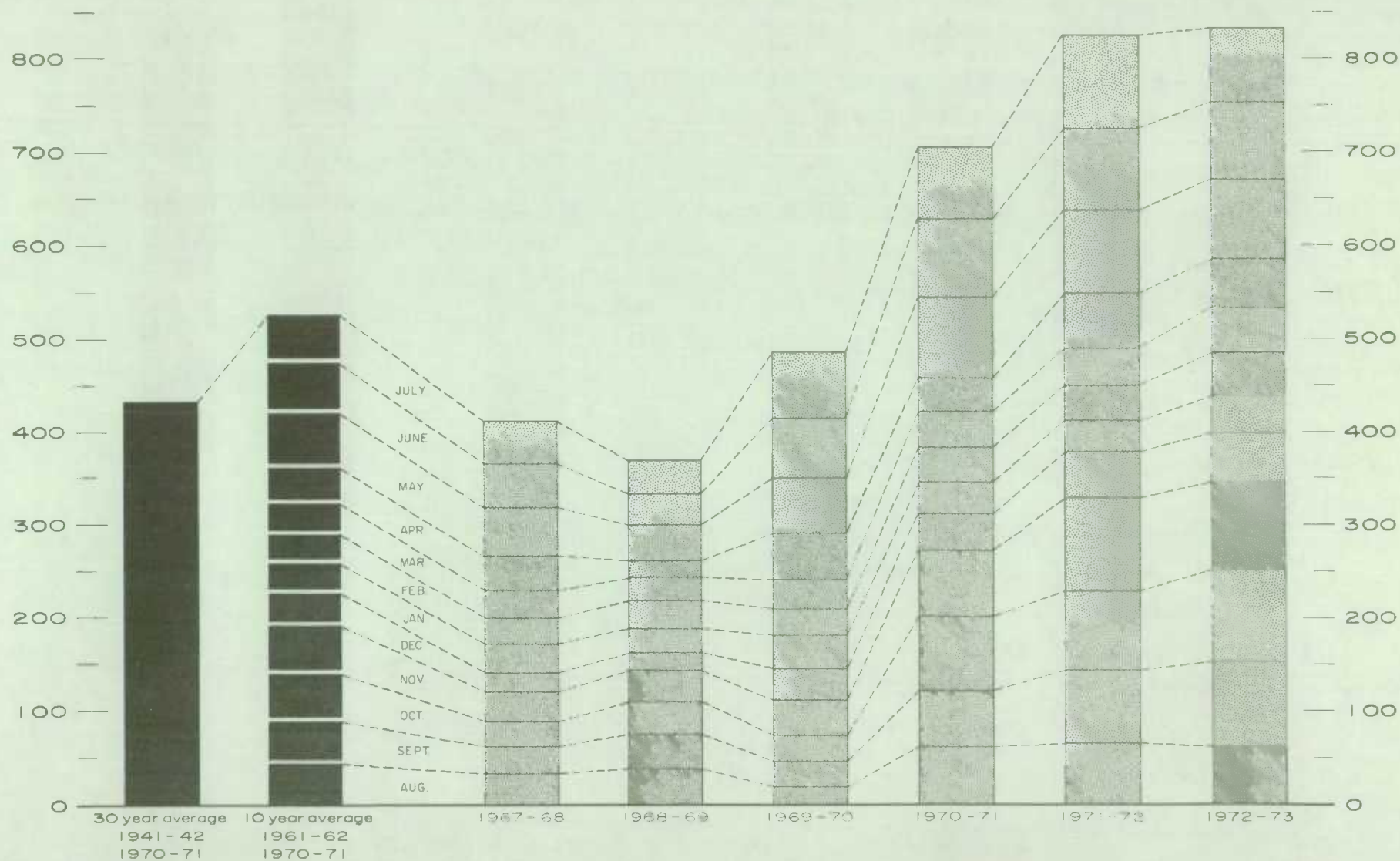
Agriculture Division, Statistics Canada

EXPORTS OF CANADA'S SIX MAJOR GRAINS AND PRODUCTS*

(SPECIFIED PERIODS)

MILLION BUSHELS
900 —

MILLION BUSHELS
— 900



* Wheat, seed wheat and wheat flour; oats, seed oats and oatmeal and rolled oats; barley and malt; rye, flaxseed and from 1960-61 rapeseed.

Customs Exports of Canadian Malt (1) 1972-73 and 1971-72

| Destination | May 1973 | June 1973 | July 1973 | August — July | |
|------------------------------|-------------|--------------|--------------|---------------|-----------|
| | | | | 1972-73 | 1971-72 |
| bushels | | | | | |
| <u>Western Europe</u> | | | | | |
| EEC: | | | | | |
| Netherlands | — | — | — | 61 | — |
| <u>Other Western Europe:</u> | | | | | |
| Britain | — | — | — | 188,906 | 317,378 |
| Total | — | — | — | 188,967 | 317,378 |
| <u>Africa</u> | | | | | |
| Ghana | — | 9,184 | — | 21,434 | 27,508 |
| <u>Asia</u> | | | | | |
| Hong Kong | — | — | — | — | 31,777 |
| Japan | 829,075 | 380,000 | 591,814 | 5,071,882 | 2,434,802 |
| Korea, South | — | — | — | 30,619 | — |
| Philippines | 58,056 | — | — | 238,334 | 509,118 |
| Total | 887,131 | 380,000 | 591,814 | 5,340,835 | 2,975,697 |
| <u>Oceania</u> | | | | | |
| U.S. Oceania | — | — | — | — | 611 |
| <u>Western Hemisphere</u> | | | | | |
| Barbados | 4,978 | 2,489 | — | 27,379 | 22,400 |
| Brazil | 61,111 | — | 61,111 | 244,444 | 278,278 |
| Costa Rica | 24,444 | — | — | 62,639 | 114,584 |
| Dominican Republic | 36,667 | — | — | 136,247 | 133,365 |
| El Salvador | — | 18,333 | 12,222 | 177,436 | 170,366 |
| Guatemala | 3,056 | — | 12,222 | 21,644 | 21,389 |
| Honduras | 7,333 | 7,333 | 7,334 | 78,222 | 56,222 |
| Jamaica | 12,528 | 5,167 | 2,758 | 286,217 | 298,048 |
| Leeward and Windward Is. | — | — | — | 14 | 1,683 |
| Nicaragua | 55,000 | 12,222 | — | 122,221 | 103,888 |
| Panama | — | — | — | 67,223 | 64,167 |
| Peru | 61,111 | — | 12,222 | 183,333 | 560,587 |
| Puerto Rico | 18,150 | 19,722 | — | 213,346 | 161,334 |
| Trinidad and Tobago | 4,194 | — | — | 13,674 | 6,667 |
| Venezuela | 85,494 | 67,222 | 978 | 526,532 | 411,321 |
| United States | 88,056 | 131,861 | 53,556 | 701,307 | 569,867 |
| Total | 462,122 | 264,349 | 162,403 | 2,861,878 | 2,974,166 |
| Total, all countries | 1,349,253 | 653,533 | 754,217 | 8,413,114 | 6,295,360 |

(1) In terms of barley equivalent. Conversion rate: 1 bushel of malt (36 lb.) equals 1 bushel of barley (48 lb.).

Inspection of Corn The following data, based on the Canadian Grain Commission's inspection of Eastern corn, indicate that some 57.1 per cent of the August 1972-July 1973 inspections have been recorded in the grades No. 1 to No. 3 C.E. compared with 61.2 per cent in the same months of the preceding crop year. Extra Dry grades accounted for some 30.7 per cent of the total inspections, as against the comparable 1971-72 figure of 37.0 per cent. The categories Tough, Damp, Moist and Wet amounted to 1.6 per cent of the current inspection of Eastern corn, as against last year's comparable total of 1.5 per cent.

In addition, a total of 32 cars of corn were inspected in the Western Division during August-July 1972-73 compared with 30 cars last year. The breakdown by individual grades is unavailable.

Grading of Yellow Corn Inspected in the Eastern Division
August-July 1971-72 and 1972-73

| Grade | August - July | | August - July | |
|------------------|---------------|----------|---------------|----------|
| | 1971-72 | | 1972-73 | |
| | bushels | per cent | bushels | per cent |
| No. 1 C.E. | 2,798,782 | 23.7 | 643,018 | 15.3 |
| No. 2 C.E. | 3,863,435 | 32.8 | 991,544 | 23.6 |
| No. 3 C.E. | 555,687 | 4.7 | 767,174 | 18.2 |
| No. 4 C.E. | 18,000 | 0.2 | 407,421 | 9.7 |
| No. 5 C.E. | 13,203 | 0.1 | 22,500 | 0.5 |
| Ex. Dry(1) | 4,362,756 | 37.0 | 1,289,936 | 30.7 |
| Tough(1) | 154,000 | 1.3 | 56,000 | 1.3 |
| Damp(1) | 4,000 | (2) | 2,000 | 0.1 |
| Moist(1) | 20,000 | 0.2 | 4,000 | 0.1 |
| Wet(1) | - | - | 2,000 | 0.1 |
| Sample C.E. | 4,000 | (2) | 20,000 | 0.5 |
| Total | 11,793,863 | 100.0 | 4,205,593 | 100.0 |

(1) All varieties and grades.

(2) Less than .05 per cent.

Corn Prices The buying average price of No. 2 Yellow corn f.o.b. Chatham rose steadily during the May-July period of 1973 from \$1.78 per bushel in April to \$1.94 in May climbed to \$2.54 in June and \$2.63 in July. At the same time the price of corn No. 3 Yellow at Chicago also increased from \$1.61 in April to \$2.01 in May, \$2.42 in June and closed at \$2.52 in July.

Monthly and Yearly Average Corn Prices 1970-71 - 1972-73

| Month | Corn No. 2 Yellow(1) | | | Corn No. 3 Yellow(2) | | |
|----------------------|----------------------|---------|---------|----------------------|---------|---------|
| | Chatham | | | Chicago | | |
| | 1970-71 | 1971-72 | 1972-73 | 1970-71 | 1971-72 | 1972-73 |
| | dollars per bushel | | | | | |
| August | 1.40 | 1.33 | 1.32 | 1.43 | 1.26 | 1.26 |
| September | 1.44 | 1.30 | 1.46 | 1.49 | 1.13 | 1.37 |
| October | 1.32 | 1.06 | 1.31 | 1.37 | 1.07 | 1.29 |
| November | 1.30 | 1.08 | 1.40 | 1.39 | 1.04 | 1.30 |
| December | 1.38 | 1.20 | 1.57 | 1.51 | 1.19 | 1.54 |
| January | 1.49 | 1.21 | 1.65 | 1.56 | 1.19 | 1.53 |
| February | 1.48 | 1.16 | 1.66 | 1.55 | 1.18 | 1.54 |
| March | 1.45 | 1.16 | 1.73 | 1.52 | 1.19 | 1.56 |
| April | 1.40 | 1.19 | 1.78 | 1.48 | 1.23 | 1.61 |
| May | 1.37 | 1.21 | 1.94 | 1.49 | 1.25 | 2.01 |
| June | 1.44 | 1.22 | 2.54 | 1.54 | 1.22 | 2.42 |
| July | 1.44 | 1.22 | 2.63 | 1.45 | 1.26 | 2.52 |
| Yearly average | 1.41 | 1.20 | 1.75 | 1.48 | 1.18 | 1.66 |

(1) Buying prices, carlots, f.o.b. Chatham, 15 per cent moisture (natural or kiln dried).

(2) Closing cash market prices, basis f.o.b. truck Chicago; U.S. dollars.

Canadian Wheat Board Monthly Average Cash Grain Prices, Crop Year 1972-73
Basis in Store Thunder Bay

| Grain and grade | May 1973 | June 1973 | July 1973 |
|-------------------------------|-------------|--------------|--------------|
| cents and eighths per bushel | | | |
| <u>Oats</u> | | | |
| Initial payment to producers: | | | |
| 2 C.W. | 70 | 70 | 70 |
| Ex. 3 C.W. | 67 | 67 | 67 |
| 3 C.W. | 67 | 67 | 67 |
| Ex. 1 Feed | 66 | 66 | 66 |
| 1 Feed | 65 | 65 | 65 |
| 2 Feed | 60 | 60 | 60 |
| 3 Feed | 56 | 56 | 56 |
| Domestic and export(1): | | | |
| 2 C.W. | 118/2 | 137/6 | 159 |
| Ex. 3 C.W. | 115/6 | 135/2 | 156/4 |
| 3 C.W. | 115/4 | 135 | 156/2 |
| Ex. 1 Feed | 115/4 | 135 | 156/1 |
| 1 Feed | 114/2 | 133/6 | 155 |
| 2 Feed | 111/2 | 130/6 | 152 |
| 3 Feed | 108/2 | 127/6 | 149 |
| <u>Barley</u> | | | |
| Initial payment to producers: | | | |
| 1 C.W. Six-Row | 107 | 107 | 107 |
| 2 C.W. Six-Row | 107 | 107 | 107 |
| 3 C.W. Six-Row | 105 | 105 | 105 |
| 1 C.W. Two-Row | 103 | 103 | 103 |
| 2 C.W. Two-Row | 103 | 103 | 103 |
| 3 C.W. Two-Row | 101 | 101 | 101 |
| 1 Feed | 95 | 95 | 95 |
| 2 Feed | 92 | 92 | 92 |
| 3 Feed | 87 | 87 | 87 |
| Domestic and export(1): | | | |
| 1 C.W. Six-Row | 199/4 | 230/1 | 258/4 |
| 2 C.W. Six-Row | 199/4 | 230/1 | 258/4 |
| 3 C.W. Six-Row | 197/4 | 228/1 | 256/4 |
| 1 C.W. Two-Row | 199/4 | 230/1 | 258/4 |
| 2 C.W. Two-Row | 199/4 | 230/1 | 258/4 |
| 3 C.W. Two-Row | 197/4 | 228/1 | 256/4 |
| 1 Feed | 169 | 199/6 | 229/5 |
| 2 Feed | 167/4 | 198/1 | 228/1 |
| 3 Feed | 164/4 | 195/1 | 225/1 |

(1) For local sales and for spot sales subject to confirmation.

Winnipeg Commodity Exchange Monthly Average Cash Grain Prices, Crop Year 1972-73
Basis in Store Thunder Bay

| Grain and grade | May 1973 | June 1973 | July 1973 |
|---|-------------|--------------|--------------|
| cents and eighths per bushel | | | |
| <u>Oats</u> | | | |
| Domestic and export: | | | |
| 2 C.W. | 118/1 | 137/5 | 158/4 |
| Ex. 3 C.W. | 115/1 | 134/6 | 155/5 |
| 3 C.W. | 115/1 | 134/6 | 155/5 |
| Ex. 1 Feed | 115/1 | 134/6 | 155/4 |
| 1 Feed | 113/6 | 133/4 | 154/3 |
| 2 Feed | 110/6 | 130/4 | 151/3 |
| 3 Feed | 107/6 | 127/4 | 148/3 |
| <u>Barley</u> | | | |
| Domestic and export: | | | |
| 1 C.W. Six-Row | 172/5 | 203/1 | 233 |
| 2 C.W. Six-Row | 172/5 | 203/1 | 232/7 |
| 3 C.W. Six-Row | 169/5 | 200/1 | 228/6 |
| 1 C.W. Two-Row | 172/5 | 203/1 | 233 |
| 2 C.W. Two-Row | 170/5 | 201/1 | 231 |
| 3 C.W. Two-Row | 169/1 | 199/6 | 228/4 |
| 1 Feed | 168/5 | 199/2 | 229/2 |
| 2 Feed | 167 | 197/6 | 227/6 |
| 3 Feed | 164 | 194/6 | 224/6 |
| <u>Rye</u> | | | |
| Producers', domestic and export prices: | | | |
| 2 C.W. | 167/7 | 209/5 | 263 |
| 3 C.W. | 159/1 | 197 | 252 |
| 4 C.W. | 142/2 | 185/5 | 237/3 |
| Ergoty | 133/2 | 175 | 232/3 |
| <u>Flaxseed</u> | | | |
| Producers', domestic and export prices: | | | |
| 1 C.W. | 552/6 | 701/7 | 895/6 |
| 2 C.W. | 547/6 | 677/3 | 886/7 |
| 3 C.W. | 517/3 | 655/7 | 864/1 |
| <u>Rapeseed</u> | | | |
| No. 1 Canada | 399/1 | 537/7 | 682/4 |
| No. 2 Canada | 383/7 | 516/5 | 666/2 |

Initial Payments
to Producers

The Canadian Wheat Board in its Instructions to the Trade re: coarse grains Nos. 4 and 5 under date of August 2, 1973 stated that the Board announces the following fixed minimum carlot prices for oats and barley basis in store Thunder Bay or Vanouwer:

Price List for Oats — 1973-74 Crop Year

| | <u>Straight Grade</u> | <u>Tough</u> dollars per bushel | <u>Damp</u> |
|-----------------------------------|---------------------------|------------------------------------|-------------|
| No. 1 C.W. Oats | \$1.10 | \$1.07 | \$1.02 |
| No. 2 C.W. Oats | 1.10 | 1.07 | 1.02 |
| Extra No. 3 C.W. Oats | 1.07 | 1.04 | .99 |
| No. 3 C.W. Oats | 1.07 | 1.04 | .99 |
| Extra No. 1 Feed Oats | 1.06 | 1.03 | .98 |
| No. 1 Feed Oats | 1.05 | 1.02 | .97 |
| No. 2 Feed Oats | 1.00 | .97 | .92 |
| No. 3 Feed Oats | .96 | .93 | .88 |
| Rejected Oats Account Heated | .91 | .88 | .83 |
| No. 4 C.W. Mixed Grain | .89 | .86 | .81 |

Price List for Barley — 1973-74 Crop Year

| | <u>Straight Grade</u> | <u>Tough</u> dollars per bushel | <u>Damp</u> |
|------------------------------------|---------------------------|------------------------------------|-------------|
| No. 1 C.W. 6 Row Barley | \$1.52 | \$1.48 | \$1.42 |
| No. 2 C.W. 6 Row Barley | 1.50 | 1.46 | 1.40 |
| No. 1 C.W. 2 Row Barley | 1.52 | 1.48 | 1.42 |
| No. 2 C.W. 2 Row Barley | 1.50 | 1.46 | 1.40 |
| No. 1 Feed Barley | 1.40 | 1.36 | 1.30 |
| No. 2 Feed Barley | 1.37 | 1.33 | 1.27 |
| No. 3 Feed Barley | 1.32 | 1.28 | 1.22 |
| Rejected Barley Account Heated ... | 1.22 | 1.18 | 1.12 |
| No. 3 C.W. Mixed Grain | 1.22 | 1.18 | 1.12 |

UNITED STATES SITUATION

A report released on August 9, 1973 by the Crop Reporting Board of the United States Department of Agriculture stated as follows:

Acreage and Production of corn for grain is forecast at a record high 5,661 million bushels. The first forecast for this year is 2 per cent more than last year and slightly more than 1971. Behind the record stands a 7 per cent increase for grain, partly offset by lower yields. Changes in production forecasts between August 1 and the final estimate have averaged 288 million bushels since 1963, ranging from 7 to 605 million bushels. During that period the August 1 forecast has been above the final estimate three times, an average of 349 million bushels, and below seven times, an average of 262 million bushels.

August 1 prospects indicate a yield per acre of 92.1 bushels compared with the record yield of 96.9 bushels in 1972 and the 1971 yield of 88.1 bushels.

Acreage for grain harvest is estimated at 61.5 million acres, down 1.0 million acres or 2 per cent from the July 1 estimate but 7 per cent more than last year. Planting continued into late June and a substantial amount of intended acreage was never planted in the eastern Corn Belt. Planted acreage is now estimated at 71.3 million acres compared with July's estimate, 72.5 million acres.

Wet spring weather held progress in the eastern Corn Belt behind normal. However, prospects are generally good to excellent; expected yields average slightly below last year except in Indiana where a record yield is forecast. Ample moisture and favourable temperatures during July accelerated growth. In Illinois, the crop is 85 per cent silked and 35 per cent in the dough stage versus the normal progress of 91 per cent silked and 50 per cent in the dough stage. The Ohio crop is 65 per cent silked and 5 per cent in dough stage compared with normals of 75 per cent and 15 per cent, respectively.

In the western Corn Belt, prospects are generally good but vary considerably by State. Kansas enjoyed ample moisture and favourable temperatures for development while the Dakotas suffer from lack of rain. Development is equal to or ahead of normal in Iowa, Minnesota, South Dakota and Nebraska but slightly behind normal elsewhere. In Iowa, the crop is good to excellent with about 85 per cent in the dough stage which is normal although slightly behind last year. Kansas expects a yield equal to last year's record high.

The Southern corn crop is generally in good conditions with adequate soil moisture, although maturity is 1 to 2 weeks later than normal in several States. Many North Carolina growers describe prospects as "the best ever". Warm and humid weather during July was very favourable for corn development in Kentucky and the crop looks promising in Tennessee, although later than normal. Harvest started in late July in Texas, about 2 weeks behind last year's starting date, and a record high yield is in prospect. About one-third of the crop was tasseled in Colorado by August 1 and cool, wet weather in late July slowed maturity. The Pennsylvania crop made good growth in most areas but considerable variation exists in height of corn.

Sorghum grain is forecast at a record high 946 million bushels, up 15 per cent above the 822 million bushels in 1972, and 70 million bushels above the 1971 record,

876 million bushels.

Sorghum to be harvested for grain, at 15.9 million acres, is 17 per cent above last year but 3 per cent below 1971. Near record yields are expected: 59.6 bushels per acre—1.1 bushels below last year's record. Changes in production forecasts from August 1 to the final estimate have averaged 46.0 million bushels over the past decade—range from 3.7 million to 127.6 million bushels.

Texas and Oklahoma yields are expected to break records, and crop-prospects are favourable for Nebraska and Kansas. Yield forecasts are equal to or greater than last year's in all States except Indiana, Missouri, South Dakota, Nebraska, Kansas, Kentucky, Tennessee, and New Mexico.

While sorghum harvest is gaining momentum in central Texas and is almost over in south Texas, it lags behind last year's pace. Kansas sorghum is also lagging behind the 1972 crop in stage of development, while Nebraska is well ahead.

Production of oats is forecast at 708 million bushels, 2 per cent more than 1972 but 20 per cent below 1971. Prospects declined from a month ago in 8 of the 12 North Central States mostly because hot July weather hurt late seeded acreage. Dryness during July also caused problems in several of the States. Yield per harvested acre, now forecast at 48.8 bushels, is below both the 1972 yield of 51.1 bushels and the record high 1971 yield of 55.9 bushels. Prolonged moisture shortages in the Dakotas reduced oats to be harvested for grain by 60,000 acres from the July 1 estimate for the U.S.

The 14.5 million acres now estimated to be harvested for grain in 1973 are 7 per cent above 1972 and 8 per cent below 1971. Changes between the August 1 production forecast and the final estimate for the U.S. averaged 24 million bushels during the past decade—ranging from 4 to 58 million bushels. During those 10 years the August 1 forecast has been above the final estimate seven times, an average of 30 million bushels, and below three times, an average of 12 million bushels.

Ripening and harvesting of the oat crop was well ahead of normal on August 1 in the Dakotas and Minnesota while harvesting progress was near normal in most other northern States.

Barley production is forecast at 430 million bushels, down 2 per cent from the July 1 forecast but 2 per cent above 1972. In some Western and North Central States, increased acreage is offsetting lower yields.

Changes between the August 1 forecast and the final estimate have averaged 7.7 million bushels for the past 10 years, ranging from 0.9 million to 22.1 million bushels.

The Nation's barley yield is expected to average 40.8 bushels compared with 43.6 in 1972 and the record high of 45.7 in 1971. Yields in the Nation's two leading barley States, North Dakota and Montana, are down 4.0 and 5.5 bushels, respectively. Decreased yields in both States were largely offset by increases in harvested acreage, resulting in only slightly lower production in each State. Hot, dry July weather speeded maturity in Montana, where about 10 per cent of the acreage was ripe by the end of the month.

Harvest is over in most South Atlantic and Southern States and just starting in Montana. Combining is well underway in the important producing North Central and Western States.

Summary of the
Feed Situation

The following summary of the feed situation in the United States has been taken from the August 23, 1973 issue of The Feed Situation published by the Economic Research Service, United States Department of Agriculture.

Extraordinary foreign and domestic demand is drawing down 1972-73 feed grain supplies to the lowest levels in many years. As a result, feed grain prices have soared and supply prospects for 1973-74 have tightened.

Several government actions in recent months have been aimed at easing the tight supply situation and encouraging larger production. Set-aside requirements in the wheat and feed grain programs for 1973 were reduced, resulting in plantings of 23 million more acres of grain and oilseed crops this year. USDA sold virtually all CCC grain into the market and allowed all outstanding grain loans to expire this summer. Also, export controls were imposed on all major protein feeds pending 1973-crop harvests. In addition, USDA has announced there will be no set-aside requirements and planting restrictions on conserving base acres for 1974 grain crops.

The feed grain supply for 1973-74 will total 242 million tons, on the basis of August 1 production indications, 3 per cent below 1972-73. Production is forecast at 207 million tons, 7 million more than last year, but carryover into the new season is down 14 million to an estimated 35 million.

A further decline in carryover is likely a year from now. Total use will exceed indicated production. Domestic use probably will be little changed from the 172 million tons of 1972-73 as prospects for lower feeding rates, reflecting higher feed costs, will about offset a 2-3 per cent gain in numbers of grain-consuming animals. Foreign demand, projected at 40 million (short) tons or nearly up to the 1972-73 level, continues exceptionally strong.

The 1973 corn crop, forecast at 5.7 billion bushels on August 1, plus an estimated carryover of less than 800 million bushels this October 1, gives a 1973-74 supply of 6.4 billion bushels, 4 per cent smaller than last year. Production at this level would be short of projected use for the second consecutive year, and would further reduce the carryout at the end of 1973-74 to around 700 million bushels. The smaller upcoming supply, strong export demand, high prices, and extensive use of grazing will probably cause a modest dip in domestic use of corn. However, continuation of high livestock and poultry prices will hold feed demand at a relatively high level. Export demand is projected at 1.1 billion bushels.

Corn at Chicago soared to \$3.40 a bushels in mid-August, the highest price of this century and more than \$2 above the low level of a year ago. However, with continuation of good to excellent crop conditions, prices dropped for 6 days in a row to \$2.80 on August 22. With the August 1 indicated supply, prices likely will remain strong this fall although below the recent high. Prices could weaken some next spring if there are indications of substantially more acreage and weather is normal for planting the 1974 crops. Early prospects for foreign demand in 1974-75 will also influence prices.

Sorghum production is forecast at a record 946 million bushels, 15 per cent above

continued on page 58.

GRAIN SITUATION IN AUSTRALIA

The following information relative to the Australian grain situation has been extracted from a report from Mr. C.V. Hiltz, Third Secretary (Agriculture) for Canada, Canberra, under date of August 10, 1973 and is reproduced with the permission of the Trade Commissioner Service, Department of Industry, Trade and Commerce.

Barley.—Although there has been no official release of total estimated barley acreage for the 1973-74 season, estimates from various State sources would indicate that this year's Australian barley crop could reach five million acres. Assuming that an average crop of 20.6 bushels per acre is harvested, then the total production could reach 103 million bushels. A crop of this size would be the third largest ever produced in Australia and would be a 40 per cent increase over last years estimated harvest of 73.2 million bushels.

In Queensland planting intentions indicate an acreage of between 0.3 and 0.4 million acres for 1973-74 compared to last year's 0.18 million acres. Because of the dry conditions in May and June only about 50,000 acres had been seeded up until early July. However, a break in the weather produced widespread rains over the grain belt and planting conditions are now ideal except for a few areas where seeding has been held up because of too much rain. The Queensland Barley Marketing Board has sold in excess of 53,000 bags of graded seed and are predicting a record planting this year. The previous largest acreage was 320,000 acres recorded in 1971-72.

In New South Wales a record barley planting of 1.3 million acres is expected. Latest estimates indicate that 1.2 million acres have already been sown and with the recent rains in the northern part of the State an additional 100,000 acres is expected to be planted. Crop development is generally good to excellent over most of the State and with present weather conditions prospects for a record crop are indeed excellent.

Barley crop prospects in Victoria and South Australia are better than they have been for a number of years. Good rains fell at the opening of the season followed by excellent seeding conditions. Since seeding, follow-up rains have been near ideal except for the north-eastern part of Victoria where too much rain has fallen. Given good finishing conditions both States could produce record crops even though record acreages aren't predicted. Currently, estimates indicate 0.7 million acres for Victoria and 1.7 million acres for South Australia.

The area planted to barley in Western Australia is currently estimated at 0.9 million acres which is a substantial reduction from last year's estimated acreage of two million acres. The reduction in barley acreage is being attributed to increased wheat plantings which are up by a million acres over 1972-73. Crops are generally in good condition and a harvest of 356,000 tons is expected. Good rains at this time would help the crop a great deal however.

Barley Marketing Board for Australia.—Some time ago the Barley Committee of the Australian Wheat Growers' Federation set up an Australian Barley Co-ordinating Committee for the purpose of examining the feasibility of establishing a single marketing body to handle Australian barley. All States were interested except Western Australia.

The Co-ordinating Committee met in late May and prepared a detailed proposal for the establishment of an "Eastern States Barley Board" to replace the existing

boards in Queensland, New South Wales and the Australian Barley Board covering Victoria and South Australia. Features of the proposal on which agreement had been reached were:

1. State accounting principles to apply
2. Uniform price policy for barley for home consumption
3. Composition of board to include:
 - a) Chairman
 - b) Two growers from each State
 - c) Two consumers' representatives
 - d) One nominee of Federal Government.

The proposal was given to the Barley Committee and it is now up to the Committee to consider this proposal and either adopt it or reject it. If adopted, then the Barley Committee will have to hold a grower ballot to see if the producers want such a Board. If the ballot is successful then each State Parliament will need to pass complementary legislation giving the new Board power to carry out its objectives.

Oats.—Although no official estimates of Australian oat acreages for 1973-74 have been released as yet, indications are that Australia could produce its biggest crop ever. State estimates released by New South Wales, Victoria and South Australia indicate acreages of 2.0, 1.1 and 0.8 million acres respectively for all purposes which are increases over last year's sowings. The balance lies in Western Australia which traditionally has been the largest producer. However, competition from wheat may reduce sowings in the State for this season.

In general oat crops are in good condition in all States and no problems have been reported. If growing conditions remain favourable for the remainder of the season, then above average yields should be obtained. Consequently there is every possibility that a record crop will be produced in the 1973-74 crop year.

Sorghum.—The 1972-73 sorghum production is not now expected to be as large as originally thought. Queensland's acreage and production estimates have been revised downwards to 22.4 million bushels produced from 820,000 acres. New South Wales on the other hand feels that their first estimates of 12.2 million bushels from 470,000 acres are fairly accurate. Therefore, it is now expected that Australia's total sorghum harvest will reach 34.6 million bushels from 1.29 million acres.

The harvest is nearing completion in both Queensland and New South Wales but has been held up during the past month because of wet weather. In fact, this year's crop has been plagued by adverse conditions. First there was drought in February followed by rain which caused second growth and head, blasting and excessive weed growth. In addition heavy infestations of heliothis had adverse effects. Now the wet weather is causing moisture problems. Despite these problems it is expected that the 1973-74 acreage will increase because of anticipated high returns. Currently the New South Wales Grain Sorghum Marketing Board has the domestic market price set at A\$67.00 (\$94.65 Cdn.) per ton f.o.r. Sydney or Newcastle.

Maize.—Harvesting of the main Australian maize crop is now about 80 per cent complete. Estimates of the crop have been revised downwards and it is now expected that total production will be in the area of 6.9 million bushels. The severe heat-wave conditions experienced early in the year followed by waterlogging on much of the low lying areas combined to depress yields in many instances. In addition the high incidence of leaf blight further reduced yields. Currently, an increase in the presence of rice weevils threatens to cause further damage.

Grain Prices in Australia (1)

1971-72 1972-73
Canadian dollars per bushel

Barley

Australian Barley Board

home consumption prices (Bulk)

| | | |
|--------------------------------|---------------|---------------|
| Malting (2 Row) | 2.09 | 2.09 |
| (2 Row) No. 3 Grade | 1.98 | 1.98 |
| | June 30, 1972 | June 29, 1973 |
| Feed (2 Row) No. 4 Grade | 1.34 | 2.05 |
| (6 Row) No. 4 Grade | 1.27 | 1.99 |

Oats

| | | |
|---------------------------|---------------|---------------|
| Melbourne — Milling | 1.13 | 1.54 |
| Feed | 1.09 | 1.48 |
| | June 14, 1972 | June 13, 1973 |

Maize (bulk)

| | | |
|--------------|-------------|------|
| Sydney | 1.63 - 1.64 | 2.40 |
|--------------|-------------|------|

Sorghum (per ton)

| | | |
|--------------|-------|-------|
| Sydney | 58.00 | 82.00 |
|--------------|-------|-------|

(1) Source - Grain Market News, Vol. 15 No. 13, July 3, 1973.

GRAIN SITUATION IN ARGENTINA

The following information relative to the grain situation in Argentina has been extracted from a report from the Commercial Division, Canadian Embassy, Buenos Aires, under date of August 8, 1973 and is reproduced with the permission of the Trade Commissioner Service, Department of Industry, Trade and Commerce.

Corn.—The first estimate of corn production for 1972-73 was published on April 17 at 9.8 million metric tons (385.8 million bushels), an increase of 67 per cent over last year's production. This is also an increase over the pre-estimate of 9.6 million tons (377.9 million bushels). This figure was obtained on a seeded area of 4.3 million hectares (10.6 million acres), according to the second estimate published

on January 31.

Production by province for 1972-73 compared with 1971-72 is as follows:

| | <u>1971-72</u> | <u>1972-73</u> |
|--------------------|------------------|----------------|
| | thousand bushels | |
| Buenos Aires | 98,813 | 155,503 |
| Santa Fe | 81,492 | 116,135 |
| Cordoba | 15,353 | 66,925 |
| Entre Rios | 23,621 | 18,503 |
| La Pampa | 921 | 8,267 |
| San Luis | 2,362 | 7,118 |
| Others | 8,133 | 13,354 |
| Total | <u>230,696</u> | <u>385,805</u> |

During June 1973 Argentina exported 588,997 metric tons of corn (23,188,000 bushels). Total exports for the first six months of 1973 amounted to 1,720,558 tons (67,735,000 bushels), Italy being the main buyer. It has been announced that negotiations are now proceeding towards the conclusion of a long-term agreement whereby Argentina would supply the Popular Republic of China with one million tons (39,368,000 bushels) of corn annually. The confirmation of this agreement is expected during the forthcoming Chinese Trade Fair to take place in Buenos Aires in late August.

On August 8, red and/or yellow hard corn was quoted at 58.00 pesos per 100 kilos (\$2.93 per bushel) f.o.r. Buenos Aires and red and/or yellow dent at 51.00 pesos (\$2.58 per bushel). On the Futures Exchange corn was quoted at 58.51 pesos (\$2.96 per bushel) for September delivery, 59.40 pesos (\$3.01 per bushel) for October, 60.01 pesos (\$3.04 per bushel) for November and 61.00 pesos (\$3.09 per bushel) for December, also per 100 kilos f.o.r. Buenos Aires.

The official minimum prices for corn published on May 15 are as follows:

| | <u>Cdn. dollars per bushel</u> |
|-----------------|--------------------------------|
| Hard | 2.38 |
| Dent | 2.23 |
| Semi-dent | 2.33 |

Millet.—On July 18 the Department of Agriculture published the second estimate of millet production for 1972-73 at 227,000 metric tons (10,009,000 bushels), an increase of 116 per cent over last year. Area seeded as of the first estimate published on December 12, was 260,000 hectares (642,000 acres). This second estimate compares with the first estimate published on April 10 at 174,000 tons (7.7 million bushels).

The following table shows production by province for 1972-73 compared with 1971-72:

| | <u>1971-72</u> | <u>1972-73</u> |
|--------------------|------------------|----------------|
| | thousand bushels | |
| Cordoba | 2,884 | 6,817 |
| Santa Fe | 1,411 | 2,072 |
| La Pampa | 4 | 714 |
| Buenos Aires | 331 | 406 |
| Total | <u>4,630</u> | <u>10,009</u> |

This second estimate reflects the highest volume since 1967-68 when it was excessive in view of moderate demand at fairly depressed prices. As a consequence the success of that harvest paved the way for future discouragement and the latest figure is only the result of the previous government's policy of high prices for agricultural products. The difference from the first estimate can be easily explained by the fact that this grain is sown and harvested at two different times so it is difficult to calculate the results of the second part at the time of the first estimate. The greatest improvement was recorded in Cordoba where conditions were very favourable during summer and the beginning of autumn.

In June 1973 Argentina exported 18,016 metric tons (794,000 bushels) of millet. Total shipments during the first six months amounted to 68,277 tons (3,010,000 bushels). The main buyer is Japan.

On August 8, millet was quoted at 42.50 pesos per 100 kilos (\$1.92 per bushel) f.o.r. Buenos Aires. The official minimum price published on May 15 is 21.00 pesos (\$0.95 per bushel).

Grain sorghum.—On July 17 the Department of Agriculture published the third estimate of grain sorghum production at a record 4,960,000 metric tons (195.3 million bushels), an increase of 110 per cent over last year. The first estimate on March 22 amounted to 4.9 million tons (192.9 million bushels) and the second, on May 15, at 4.6 million tons (181.1 million bushels). The third estimate of area seeded published on February 1 was set at 2.9 million hectares (7.2 million acres).

The following table shows production by province for 1972-73 compared with 1971-72:

| | <u>1971-72</u> | <u>1972-73</u> |
|--------------------|------------------|----------------|
| | thousand bushels | |
| Cordoba | 18,149 | 70,192 |
| Santa Fe | 23,227 | 40,864 |
| Buenos Aires | 24,211 | 34,683 |
| La Pampa | 787 | 18,818 |
| Entre Rios | 11,456 | 10,708 |
| Chaco | 6,574 | 8,818 |
| Others | 8,503 | 11,180 |
| Total | <u>92,908</u> | <u>195,265</u> |

Trade circles report that this third estimate is too optimistic and that as weather conditions and yields did not subsequently improve to the extent anticipated by the Department of Agriculture, the final harvest would probably be under 4.5 million tons (177.2 million bushels). The error apparently proceeds from Santa Fe where the Department of Agriculture expects over one million tons (39.4 million bushels), based on the yield of hybrids, while private sources point out that excessive rainfall seriously damaged plantations and brought the final volume to well below these one million tons (39.4 million bushels).

In June 1973 Argentina exported 232,313 metric tons (9,146,000 bushels) of grain sorghum. Total exports during the period January-June amounted to 795,639 tons (31,323,000 bushels). The main buyers are India and Japan.

On August 8, grain sorghum was quoted at 51.50 pesos per 100 kilos (\$2.61 per bushel) f.o.r. Buenos Aires. The minimum price for grain sorghum was set on May 15 at 38.00 pesos (\$1.92 per bushel).

Oats, barley and rye.—On March 30 the Department of Agriculture published the second estimate of 1972-73 oats, barley and rye production at 566,600, 880,000 and 690,000 metric tons (36.7 million, 40.4 million and 27.2 million bushels), respectively. The three grains show increases over last year's production.

On June 25, the Department of Agriculture announced the area seeded to these grains for 1973-74. Area seeded for 1973-74 compared with 1972-73 is as follows:

| | <u>1972-73</u> | <u>1973-74</u> |
|--------------|----------------|----------------|
| | thousand acres | |
| Oats | 3,019 | 2,964 |
| Barley | 1,425 | 1,450 |
| Rye | 6,259 | 6,200 |

Oats area for 1973-74 cannot be considered large if it is recalled that only 40 per cent of the total acreage is usually harvested; the remainder is destined to cattle grazing.

The improvement of cattle prices encouraged a further increase in the area sown to feed barley this season, being the largest for the past twenty years at least. Like the other feed grains, barley is mainly sown for direct grazing, less than 20 per cent of the total area having been harvested during recent years. Rye has fallen slightly but it is quite probable that late sowings will make up for this season's deficit of 24,000 hectares (59,000 acres). This grain is also mainly sown for direct grazing, only around 20 per cent being harvested, but demand from foreign countries, Italy especially, will encourage harvesting this season at prices which may be expected to hold to satisfactory levels.

During June 1973 Argentina exported 2,812 metric tons (182,000 bushels) of oats, 6,516 tons (299,000 bushels) of barley and 8,530 tons (336,000 bushels) of rye. Total shipments during the period January-June amounted to: oats, 92,058 tons (5,969,000 bushels); barley, 95,762 tons (4,398,000 bushels); and rye 28,727 tons (1,131,000 bushels). The main buyers of these grains are: Italy (oats and barley), Japan (rye) and W. Germany (oats).

On August 8, prices for oats, barley and rye, f.o.r. Buenos Aires were as follows:

| | <u>Cdn. dollars per bushel</u> |
|----------------------|--------------------------------|
| Yellow oats | 1.46 |
| Malting barley | 2.47 |
| Forage barley | 2.04 |
| Rye | 2.53 |

The minimum prices for these grains for the 1973-74 crop were published on May 23 at:

| | <u>Cdn. dollars per bushel</u> |
|----------------------|--------------------------------|
| White oats | 1.11 |
| Yellow oats | 1.04 |
| Malting barley | 1.69 |
| Forage barley | 1.43 |
| Rye | 1.64 |

GRAIN SITUATION IN ITALY

The following account of the current coarse grain situation in Italy has been extracted from a report by Mr. U. Boschetti, Commercial Officer, Canadian Embassy, Milan, under date of July 16, 1973 and is reproduced with the permission of the Trade Commissioner Service, Department of Industry, Trade and Commerce.

General-E.E.C. regulations.— The main event which occurred during this quarter of 1973 was the reaching of an agreement between the members of the European Community as regards prices of agricultural products for 1973-74.

The Ministers of Agriculture of the ten EEC countries signed this important agreement on May 28, 1973 in Brussels, the results of which for coarse grains may be summarized as follows:

| | | | |
|------------|-------------------------|-------------------------|---------------------------|
| Soft wheat | <u>Indicative price</u> | \$114.94 per metric ton | <u>Intervention</u> |
| | <u>price</u> | \$105.80 per metric ton | |
| Hard wheat | <u>Indicative price</u> | \$133.93 per metric ton | <u>Minimum guaranteed</u> |
| | <u>price</u> | \$155.33 per metric ton | |
| Maize | <u>Indicative price</u> | \$102.77 per metric ton | |
| Barley | <u>Indicative price</u> | \$105.29 per metric ton | <u>Intervention</u> |
| | <u>price</u> | \$ 96.66 per metric ton | |
| Rye | <u>Indicative price</u> | \$112.30 per metric ton | |

The above prices will be in force on August 1, 1973.

May-July 1973 — maize.—During the whole quarter fairly important quantities of the domestic product were offered to the market. The product was almost completely absorbed through the demand of breeders and feed manufacturers. In May and June

imports continued at a remarkable pace. July data are not yet available but it is estimated that imports will maintain the same quota as last July. Below are "in bulk" quotations for the foreign qualities, all for consumption purposes, at the Milan Grain Exchange on June 27, 1973 - value added tax and packing not included.

| | |
|----------------------|------------------------------|
| Plate | Cdn. \$141.80 per metric ton |
| South Africa | Cdn. \$136.27 " " " |
| US Yellow corn | Cdn. \$139.75 " " " |

Import certificates released for this grain for the period August 1, 1972 to June 12, 1973 were 4,905,695 metric tons (193,127,000 bushels).

Barley and oats.—The offer of domestic production for both grains was very scarce as the stocks are almost completely exhausted. As far as imports are concerned, good transactions were concluded for oats from Spain, Sweden, Argentina and Canada. For barley, imports continued at a remarkable pace from France, the USSR and Canada. Below are "in bulk" quotations for the imported products, all for feed purposes, at the Milan Grain Exchange on June 27, 1973; value added and tax packing not included.

| | |
|--------------|------------------------------|
| Barley | Cdn. \$140.00 per metric ton |
| Oats | Cdn. \$137.70 " " " |

Import certificates released for barley for the period August 1, 1972 to June 12, 1973 were 1,280,126 metric tons (58,795,000 bushels). For oats during the same period import certificates amounted to 148,168 metric tons (9,607,000 bushels).

Summary.—These are the prospects for each product for the third quarter of 1973:

As already reported, there is no information on the 1973-74 local maize production. However, trade sources say that also for this grain there will be a lower production compared to last year's. Consequently, it is expected that imports will be active during this quarter both from the traditional supplying countries and from Eastern European countries and Brazil. Should the levy for both barley and oats remain at zero, it is expected that a revival of imports will occur. It is therefore hoped that a higher quota of imports for both grains, especially barley, will be imported from Canada. The situation for rye remains unchanged. The domestic production has been entirely sold and is sufficient to cover local requirements. Imports continue to be negligible due to the high levy to protect against illegal mixing of rye and wheat flour.

FEDERAL REPUBLIC OF GERMANY QUARTERLY GRAIN REPORT

The following account of the recent grain situation in the Federal Republic of Germany has been extracted from a recent report supplied by Mr. K. Schmitz, Commercial Officer (Agriculture), Canadian Embassy, Bonn, West Germany, and is reproduced with the permission of the Trade Commissioner Service, Department of Industry, Trade and Commerce.

Weather conditions and crop conditions.—In some areas West German farmers started grain harvesting in early July. According to the first official forecast published by the Federal Ministry of Agriculture July 30 another above average grain crop may be expected. Although hot temperatures and dry weather have influenced yields — June precipitation in some areas of Northern Germany did not exceed 55 per cent of the long-term average — total production is estimated at 20.0 million tons, corn included, compared with 20.2 million tons in 1972 and 20.9 in 1971 while the 5-year average of 1967-72 was 19.1 million tons. The area in grain this year is estimated at 5.3 million hectares (13.1 million acres).

The dry weather conditions in Northern and parts of Western Germany during the December-March period and again in June, reduced yields particularly on light soils. At the same time crops in Bavaria have been in excellent conditions and high yields are expected. A more detailed analysis on yields and qualities will be available by the end of August.

Summary of the Coarse Grains Situation, August — April

| | <u>Rye</u> | | <u>Barley</u> | | <u>Oats</u> | | <u>Corn</u> | |
|--------------------------|----------------------|---------|---------------|---------|-------------|---------|-------------|---------|
| | 1971-72 | 1972-73 | 1971-72 | 1972-73 | 1971-72 | 1972-73 | 1971-72 | 1972-73 |
| | thousand metric tons | | | | | | | |
| Available production . | 3,092 | 2,954 | 5,601 | 5,817 | 4,120 | 3,909 | 576 | 547 |
| Change in stocks(1) ... | +685 | +371 | +1,112 | +1,411 | +879 | +797 | +311 | +236 |
| Exports | 95 | 357 | 658 | 524 | 71 | 103 | 326 | 344 |
| Imports(2) .. | 65 | 100 | 1,422 | 1,206 | 248 | 455 | 2,149 | 2,223 |
| Domestic utilization . | 2,377 | 2,326 | 5,253 | 5,088 | 3,418 | 3,464 | 2,088 | 2,190 |
| Seed | 141 | 131 | 233 | 242 | 155 | 164 | 24 | 37 |
| Feed | 1,370 | 1,335 | 3,235 | 3,188 | 3,176 | 3,220 | 1,471 | 1,523 |
| Loss | 15 | 15 | 34 | 33 | 1 | 1 | 7 | 12 |
| Industrial consumption . | 38 | 33 | 1,740 | 1,604 | — | — | 385 | 395 |
| Food consumption(3) | 813 | 812 | 21 | 21 | 86 | 79 | 201 | 223 |

(1) On key day August 1, only old crop grain was considered.

(2) Imports from GDR included.

(3) In grain value.

Total grain sales between August 1972 and May 1973 amounted to 8.1 million metric tons, 1 per cent more than last year.

Farmers' Marketing of Coarse Grains, August — May (1)

| | Rye | Barley | Oats | Corn |
|---------------|----------------------|---------|-------|-------|
| | thousand metric tons | | | |
| 1970-71 | 1,001.3 | 1,726.1 | 333.1 | 136.7 |
| 1971-72 | 1,190.6 | 2,000.4 | 456.6 | 217.7 |
| 1972-73 | 1,226.1 | 2,371.9 | 428.0 | 133.7 |

(1) Sales to small mills not included.

The following stocks of coarse grains were held by processors, traders and co-operatives on June 1 (stocks in small mills not included):

| | <u>1972</u> | <u>1973</u> |
|-----------------------------|----------------------|-------------|
| | thousand metric tons | |
| Rye and rye flour (1) | 267.2 | 298.1 |
| Barley | 641.2 | 649.3 |
| Oats | 146.8 | 128.4 |
| Corn | 166.6 | 208.7 |
| Corn starch | 15.4 | 19.0 |

(1) In grain value.

The utilization of grain in mixed feed at a total of 3,279,300 metric tons for the August-May period 1972-73 is remarkably above last year's 3,056,600 tons. The following is a breakdown by grain crops:

| | <u>1971-72</u> | <u>1972-73</u> |
|--------------|----------------------|----------------|
| | thousand metric tons | |
| Wheat | 736.0 | 1,007.6 |
| Rye | 73.2 | 95.8 |
| Barley | 550.8 | 562.2 |
| Oats | 320.9 | 316.6 |
| Corn | 1,357.6 | 1,290.2 |
| Others | 18.1 | 6.9 |
| Total | 3,056.6 | 3,279.3 |

The total production of mixed feed at a total of 9.1 million tons for the period of August 1972 to May 1973 was 6 per cent above last year's. While the production of mixed feed for poultry, other than for poultry meat production, decreased from 2.5 during August-May 1971-72 to 2.4 million tons in 1972-73, the production of mixed feed for all other kinds of livestock was larger than last year.

Crops conditions.—This year's production of brewing barley in Bavaria is estimated to total 750,000 metric tons. This should be sufficient to cover the demand of Bavarian breweries, requiring a total of approximately 625,000 tons for their annual beer production of 26 million hectoliters. The Bavarian Breweries Association reports that local breweries contract less than 150,000 tons of barley (6,889,000 bushels) as a raw material, whereof 15 to 20 per cent are grown under producers' contracts. The rest of their requirements is contracted as malt. First results of this year's crop indicate that protein contents exceed in many areas the limit of 11.5 per cent set up as a quality standard for brewing purposes.

One of the major co-operatives in Lower-Saxony and regional association of grain traders have approached the Federal Ministry of Agriculture last week to request revision of the minimum requirements for the marketing of rye. Because of dry weather conditions in June especially on light soils in Northern Germany the share of small kernels is far above admitted limits. Heavy rainfalls in early July have also increased the percentage of excrescence. Large volumes of rye shipments are therefore not marketable under existing regulations and cannot even be sold under the intervention system. The above mentioned groups have therefore called on the Federal Ministry to lower the usually required share of "sound" rye to 85 per cent.

Estimated Total Area of Grain July 31, 1973

| | <u>1973</u> thousand acres | <u>Change</u> per cent |
|--------------------------|-------------------------------|---------------------------|
| Winter wheat | 3,403 | - 4.1 |
| Summer wheat | 545 | + 16.6 |
| Winter rye | 1,764 | - 12.1 |
| Summer rye | 72 | - 5.6 |
| Mixed winter grain | 73 | - 17.1 |
| Winter barley | 1,548 | + 10.4 |
| Summer barley | 2,574 | + 6.2 |
| Oats | 2,026 | - 1.6 |
| Mixed summer grain | 786 | - 1.7 |
| Corn | 260 | - 10.6 |
| Total grains | <u>13,051</u> | |

The most noteworthy figure may be the smaller acreage of corn as the rates of growth until 1972 were tremendously high and made corn one of the major crops in Germany. One of the reasons for the decline is the bad experience of last year when ripening process was too short and wet weather conditions in fall made the harvesting next to impossible in some areas.

Unless the Agricultural Ministry can obtain a decision from the EC-Commission to lower the minimum standards growers would face serious difficulties if they could not market any of their out-put which did not meet these minimum standards. The co-operatives state with certain justification that unless this serious market problem is overcome by a favourable decision the incentive to produce in subsequent years will be diminished.

GRAIN SITUATION IN FRANCE

The following information relative to the French grain situation has been extracted from a report from Mr. G.W. Doucet, Commercial Secretary (Agriculture) Canadian Embassy, Paris, under date of August 9, 1973 and is reproduced with the permission of the Trade Commissioner Service, Department of Industry, Trade and Commerce.

Supply-disposition.—For the August 1972 to May 1973 period, farm deliveries of barley reached 3,976,000 metric tons (182,614,000 bushels), while total farm marketings brought 5,992,700 tons (275,240,000 bushels) out of the 1972 harvest. Remember that the ONIC total estimate was placed at 6,080,000 tons (279,250,000 bushels).

Barley for domestic use amounted to 1,509,200 tons (69,316,000 bushels) compared with 1,382,800 tons (63,511,000 bushels), while barley exported was 3,139,800 tons (144,209,000 bushels) compared with 3,586,000 tons (164,702,000 bushels) last year. Stocks remaining on June 1 were 1,457,200 tons (66,928,000 bushels) in sharp contrast to the 585,100 tons (26,873,000 bushels) on June 1, 1972.

With the strong marketings of April and May total farm marketings were 6,128,800 tons (241,278,000 bushels), approaching the ONIC total estimate placed around 6,500,000 tons (255,891,000 bushels).

Total domestic disposition reached 3,098,100 tons (121,966,000 bushels) compared to 2,943,400 tons (115,875,000 bushels) last year. For these first ten months, exports decreased to 2,399,800 tons (94,475,000 bushels), in contrast to 3,157,900 tons (124,320,000 bushels) last year. Stocks of corn available on June 1 were 1,843,600 tons (72,579,000 bushels) compared with 1,615,600 tons (63,603,000 bushels) on June 1, 1972.

External trade.—Imports of barley and oats amounted to 3,201 tons and 148 tons (147,000 and 9,600 bushels), respectively, compared with the last year's figure of 12,065 tons and 162 tons (554,000 and 10,500 bushels). Canada's shipment of barley to France declined from 264 tons (12,100 bushels) last year to 220 tons (10,100 bushels) during the eleven months period. There was no oats shipment from Canada during this period.

On the other hand, and despite the bad French production registered last fall corn imports amounted to 232,140 tons (9,139,000 bushels) compared with 291,748 tons (11,486,000 bushels) a year earlier. Key suppliers remained the U.S.A. with 193,803 tons (7,630,000 bushels) compared with 192,620 tons (7,583,000 bushels); South Africa with 21,913 tons (863,000 bushels) followed by Argentina with 12,505 tons (492,000 bushels).

For the August 1972 — June 1973 period, French exports of barley amounted to 3,499,384 tons (160,724,000 bushels), while they were 3,836,074 tons (176,188,000 bushels) during the comparable period last year, registering a 336,689 ton (15,464,000 bushels) decline. Exports to the enlarged EEC increased from 1,293,706 tons (59,419,000 bushels) last year to 1,335,342 tons (61,331,000 bushels), while shipments to Third Countries declined by 378,326 tons (17,376,000 bushels) from 2,542,368 tons (116,769,000 bushels) last year to 2,164,042 tons (99,393,000 bushels). Among those Third Countries key buyers were as follows: USSR 877,439 tons (40,300,000 bushels), Switzerland 460,333 tons (21,143,000 bushels), Hungary 317,129

tons (14,565,000 bushels) and Poland 204,395 tons (9,388,000 bushels).

Corn exports on July 1, 1973 totalled 2,706,182 tons (106,537,000 bushels) compared to 3,534,906 tons (139,162,000 bushels) on July 1, 1972. Total sales to the enlarged EEC declined from 3,451,219 tons (135,867,000 bushels) to 2,659,986 tons (104,718,000 bushels). Purchases from Third Countries decreased from 83,687 tons (3,295,000 bushels) to 46,196 tons (1,819,000 bushels).

Total oat exports increased to 205,064 tons (13,297,000 bushels) from the 185,315 tons (12,016,000 bushels) last year representing a gain of 19,749 tons (1,281,000 bushels). Some 200,712 tons (13,014,000 bushels) were shipped to the enlarged EEC, compared with 163,621 tons (10,609,000 bushels). Exports to Third Countries went down, from 21,693 tons (1,407,000 bushels) to 4,351 tons (282,000 bushels) which mainly affected the Switzerland purchases of 3,075 tons (199,000 bushels) compared with 20,595 tons (1,335,000 bushels) a year earlier.

NEW CROP: Hereunder are listed the July 1, 1973 estimates, relating to both winter and spring coarse grains seedings, yields and productions compared with July 1, 1972.

| | <u>Cultivated acreage</u> | | <u>Yield</u> | | <u>Production</u> | |
|-----------------------|---------------------------|-----------------|------------------------|-----------------|----------------------|--------------|
| | July 1, 1972 | July 1, 1973 | July 1, 1972 | July 1, 1973 | July 1, 1972 | July 1, 1973 |
| | thousand hectares | | metric ton per hectare | | thousand metric tons | |
| Winter coarse grains: | | | | | | |
| Rye | 128.0 | 123.1 | 2.6 | 2.6 | 330.8 | 317.1 |
| Barley | 483.9 | 528.7 | 4.3 | 4.3 | 2,073.6 | 2,272.9 |
| Oats | 140.5 | 135.0 | 3.0 | 3.0 | 424.6 | 399.8 |
| Spring coarse grains: | | | | | | |
| Barley | 2,190.3 | 2,222.0 | 3.8 | 3.7 | 8,352.3 | 8,168.2 |
| Oats | 621.7 | 576.4 | 3.3 | 3.2 | 2,038.9 | 1,867.7 |
| Mixed grains .. | 197.6 | 202.0 | 3.2 | 3.2 | 640.2 | 653.4 |
| Total: | | | | | | |
| Barley | 2,674.2 | 2,750.7 | 3.9 | 3.8 | 10,425.9 | 10,441.1 |
| Oats | 762.2 | 711.4 | 3.2 | 3.2 | 2,463.5 | 2,267.5 |

Weather conditions.—Due to the cold and dry weather conditions registered over April, spring coarse grains growth was slackened, despite seedings which were completed in excellent conditions (early and very good tilling activities). Sprouting was irregular, mainly due to the lack of moisture and warm temperature. Corn seeding began in April with earlier varieties than those used in 1972 spring. This might be explained by the previous corn harvest, which had been delayed late in the 1972 fall because of the insufficient maturity. May began with rain during

the first ten days, and then continued with hot and dry weather, sometimes turning to warm temperatures and storms during the end of the month. As a result of these favourable conditions, the March and April delays were overtaken and winter barley headed on the eve of June.

June was very hot and dry and also the first days of July. Therefore winter barley suffered from the drought, and the resulting kernels were sometimes shrivelled for barley cropped on light fields. Irrigations were undertaken for corn, which otherwise suffered from the lack of moisture. The second part of July (beginning on the 14th) was rainy and the rainfalls secured a large amount of water to corn, at the propitious time since male panicles were just blooming (the appraising is always taking place on July 14). Rain was increasing from the 14th to the 26th. After a few days of lull, a new raining period occurred from August 1 to the 6th, jeopardising the harvest activities, especially for durum wheat lodged fields. All grains were harvested with a high moisture percentage, while the harvest was less than halfly completed.

GRAIN SITUATION IN BRITAIN

The following information relative to grain situation in Britain has been extracted from a report by Mr. G.D. Cooper, Commercial Officer, (Agriculture) London, under date of August 14, 1973 and is reproduced with the permission of the Trade Commissioner Service, Department of Industry, Trade and Commerce. All values in Canadian dollars converted at £1 = Canadian \$2.54.

General conditions.—Cool and rather dry weather in the early part of May was followed by a warmer wet spell which encouraged rapid growth in cereals. June was particularly warm, dry and sunny until the middle of the month when heavy rains fell with thundery spells which continued during the remainder of the month. During July, conditions generally deteriorated with cooler weather and some heavy storms. In general, both winter and spring sown cereals looked healthy and promising but heavy rains caused lodging which was severe in some places. Yellow rust and mildew were reported in many areas.

Cereals production.—The Ministry of Agriculture have released the provisional results of the June 1973 Agricultural Census for England and Wales which show an increase in the wheat acreage but decreases in barley, oats and mixed grains amounting to a reduction in the total cereals acreage.

Compared with June 1972 the area under cereals has decreased by 33,000 acres or 0.4 per cent to 8,041,000 acres. The barley acreage is down by 40,000 acres or 0.8 per cent to 4,666,000 acres and oats are down by 39,000 acres or 7.7 per cent to 476,000 acres. Other cereals crops, i.e. mixed grains, rye and corn have decreased by 28,000 acres or 18 per cent to 123,000 acres.

Based on the foregoing and estimates for Scotland and Northern Ireland, total UK production of barley is provisionally estimated at 8,496,000 long tons (396,480,000 bushels) from 5,664,000 acres and for oats at 1,030,000 long tons (67,859,000 bushels) from 698,000 acres.

Consumption and supplies.—In the last assessment for the 1972-73 season, before full figures for the year are available, an increase of 50,000 long tons is estimated in supplies of imported coarse grains and following from this, a similar increase in the amount of coarse grains for animal feed.

Statistics relating to the cumulative intake of barley by maltsters, distillers and other processors and all other coarse grains by processors from July 1, 1972 to the end of May 1973 showed some increase.

Imports of corn to the end of May 1973 from July 1 are recorded at 3,195,000 long tons (127,800,000 bushels) compared with 2,792,000 long tons (111,680,000 bushels) for the same period of the previous year. Imports of other coarse grains from July 1, 1972, to the end of May 1973 are shown at 580,000 long tons, a significant decrease compared with the same period for 1971-72 of 1,130,000 long tons.

Forward commitments for coarse grains are notified at 590,000 long tons for delivery during May-June 1973, a decrease of 204,000 long tons or 26 per cent. The balance of import requirements is estimated at 60,000 long tons.

Stocks of coarse grains on farms in Great Britain.—Stocks of coarse grains on farms in Great Britain as at the end of May 1973 were: barley 820,000 long tons (38,267,000 bushels) compared with 550,000 long tons (25,667,000 bushels) as at the end of May 1972, and oats 100,000 long tons (6,588,000 bushels) compared with 150,000 long tons (9,882,000 bushels) as at the end of May 1972. Total stocks as percentages of total production were 9.25 per cent and 8.5 per cent for barley and oats, respectively, compared with 6.75 per cent for barley and 11 per cent for oats for the previous year.

Prospects for the 1973-74 cereals market.—The General Home-Grown Cereals Authority have published a note designed to assist those concerned with marketing the new domestic crop. The chief features are as follows:

General.—Despite the higher levels of price support in 1973-74 under EEC arrangements, the recent remarkable rise in world cereals prices suggests that these will continue to be above the UK derived threshold price. If this situation prevails, growers and traders will not only have to take account of the supply/demand situation in the United Kingdom and other countries of the EEC but also of the world market as this could still largely determine the price of UK imports.

United Kingdom support measures.—With regard to specific UK support measures guaranteed prices for cereals continue and for barley has been fixed for the 1973-74 cereals year at ± 33.20 per long tons (\$84.00 Cdn.) and that for oats at ± 32.00 per long ton (\$81.00 Cdn.). The Home-Grown Cereals Authority Forward Contract Bonus Scheme will not operate in 1973-74.

EEC support measures — International Trade.—International Trade in the early months of the United Kingdom's adoption of the Common Agricultural Policy has been particularly difficult because of the complicated measures needed by the EEC system to take account of unusually high world prices and floating currencies.

Seasonal incentives.—Official EEC prices — intervention, threshold and target — increase during the season by monthly increments designed to encourage orderly marketing by providing a reward for storage. Despite its lower prices, the United Kingdom benefits from the full EEC increments. The intervention prices rise in nine steps of 50 pence per month from September for wheat and eight steps of 40 pence per month from October for barley. All seasonal increments are removed from intervention prices in the last two months — June and July — of the marketing year to guard against early harvested new crop grain being offered into intervention at high old season prices.

Threshold prices do not drop back at the end of May. On wheat there is an extra increment in June and for all grain the prices stay at the high May or June level through to July. If the UK market price is dominated by world prices however, there is no guarantee that end-of-season prices will bear a particular relationship to early new season prices, though of course intervention and threshold prices provide floors to domestic and third country import prices respectively.

End-of season stock compensation.—Because in the full EEC, prices drop back at the end of the season, there is a risk that any substantial stocks of grain held in store at the end of the season would be sold into intervention at the high end of season price available until May 31 rather than suffer a substantial value drop. Accordingly, where the Council and Commission deem this necessary, there is provision for end-of-season stock compensation payments to offset the drop in price.

United Kingdom domestic supply/demand situation.—The demand for cereals for home consumption is not expected to increase substantially but increased livestock numbers could possibly result in an extra demand of some 500,000 long tons for animal feed. This may incur some increase in imports. High prices of proteins and cereals subsidies coupled with demand for concentrated feeds for animals will continue to be made by cereals regardless of their high prices.

Marketing of the 1972-73 crop.—Harvesting conditions were relatively good although harvesting was somewhat protracted. There were indications of increased UK animal populations creating additional needs at least matching the high UK productions.

Steadily rising prices were the outcome of both domestic factors and the general world situation, with further complications involved by the floating of the pound Sterling necessitating a reduction in the parity of the pound against the unit of account. Compensatory amounts remain unaltered but international currency problems necessitated the adoption of monetary compensatory amounts.

GRAIN SITUATION IN JAPAN

The following account of the current situation in Japan has been extracted from a report by Mr. W.K. Robertson, Commercial Secretary (Agriculture) for Canada, Canadian Embassy, Tokyo under date of August 20, 1973, and is reproduced with the permission of the Trade Commissioner Service, Department of Industry, Trade and Commerce.

Current situation.— Rapidly increasing food and feed prices have given rise in Japan to concern that this country is too dependent on foreign sources for agricultural products. Agricultural self-sufficiency has declined from 89 per cent in 1960 to 74 per cent in 1971 and when the large imports of feed grains are included in the calculation, actual self sufficiency is nearer 55 per cent. Recent measures by the United States and Canada to control exports of protein material have once again drawn attention to the vulnerability of Japanese food supplies.

The government of Japan is under increasing consumer pressure to expand domestic production and to develop programs to cope with rapidly rising food prices.

Rice of course dominates Japanese agriculture. Production and demand are presently in equilibrium, but production of wheat and barley continue to decline as indicated in the following table.

| | <u>Production</u> | | | <u>Estimate(1)</u> |
|----------------------------|----------------------|-------------|-------------|--------------------|
| | <u>1970</u> | <u>1971</u> | <u>1972</u> | <u>1973</u> |
| | thousand metric tons | | | |
| Rice | 12,689 | 10,887 | 11,897 | 11,800 |
| Wheat | 474 | 440 | 284 | 171 |
| Barley and naked barley | 572 | 503 | 324 | 172 |
| As at May 15. | | | | |

Projected demand and production.— The most recent projections of the Ministry of Agriculture comparing 1970 and 1982 demand for major grains are:

| | <u>1970</u> | <u>1982</u> |
|----------------|----------------------|-------------|
| | thousand metric tons | tons |
| Rice | 11,948 | 10,830 |
| Wheat | 5,207 | 5,760 |
| Barley | 1,685 | 2,340 |
| Soybeans | 3,281 | 4,427 |

Production projections of these crops over the same period show however that there will be much less acreage planted to both rice and grain crops in 1982, but that soybean acreage is expected to increase.

| | <u>Total Area Planted</u> | |
|------------------------|---------------------------|-------------|
| | thousand hectares | |
| | <u>1970</u> | <u>1982</u> |
| Rice | 2,923 | 2,246 |
| Wheat and barley | 454 | 319 |
| Soybeans | 96 | 240 |

The shortfall must be made up from imports. It is already estimated that self-sufficiency for wheat and soybeans are approximately 8 per cent and 3 per cent respectively, and notwithstanding the projected increase in soybean acreage, the situation will continue to worsen.

Livestock population is to be increased significantly according to the estimates of officials, but with the exception of swine it is extremely unlikely that the projection as set out below will be reached.

| | <u>1972</u> | <u>1982</u> |
|--------------------------------------|-------------|-------------|
| Dairy cattle | 1,856,000 | 3,080,000 |
| Beef cattle (incl. dairy steers) ... | 1,759,000 | 3,346,000 |
| Swine | 6,985,000 | 16,662,000 |

Obstacles to be overcome in meeting objectives .— Despite public pressure and efforts by the Ministry of Agriculture to increase production of grains and soybeans there are several problems that will be almost impossible to overcome.

The first problem relates to rice production which is heavily subsidized. In addition to this factor and the traditional preference for producing the crop, conversion to other grain crops is most difficult to encourage. In 1971 when rice surpluses amounted to 7,000,000 tons the government was forced to introduce policies that would reduce production. Since then some 500,000 hectares have been taken out of production, either idled, or planted to other crops and tree fruits. This was accomplished through a complex system of subsidies. In the interim, production has been reduced, and surpluses have disappeared. Concurrently a general rice shortage has developed in Asia as a result of abnormal weather conditions over the past two years. The government therefore had decided to eliminate payments for idled rice land as of next year and it is expected that some 300,000 additional hectares will be sown to rice.

The Ministry of Agriculture and the farm unions have just concluded their 1973 rice price negotiations. The Ministry had proposed a 9.1 per cent increase but farmers, faced with rapidly rising costs asked for a 46 per cent price increase. On August 8 it was announced that the producer price for rice for the 1973 crop will be increased 16.1 per cent to ¥172 per kg. This is the largest price increase since the immediate post war period. It had already been decided that the resale price would not be increased in 1973 so the difference between producer prices and resale prices will create an additional deficit for the government of approx. ¥200,000 million. Rising world wheat prices and the decision by the Japanese government not to raise resale prices to wheat users is also adding to the current deficit which in total will amount to some ¥500,000 million. This cannot be maintained indefinitely so it is very likely that there will be an increase in the price of both rice and bread in 1974.

However the most serious result of the decision to raise producer prices of rice by 16.1 per cent is the effect it will have on the production of other crops. Support prices of wheat and barley were increased 14 per cent earlier this year but the gap between farm income received from wheat and barley production and that derived from rice growing continues to widen. The producer price of wheat and barley is now approximately 36 per cent of rice so prices for these crops will have to be increase 3 fold to cause a significant shift on production.

However the decision to increase producers rice price was based on strong political pressure on the government from rural areas. This will be a major factor in the Japanese Upper House elections to be held in the summer of 1974.

Meantime it can be assumed that Japanese production of wheat, barley and soybeans will decline even further unless special incentives are implemented to reverse the trend. This question is being studied now by officials in the Ministry of Agriculture and Forestry but to be effective, the subsidies and special loans would be so costly to the government that it is extremely unlikely that such measures could be implemented.

Another major problem related to increasing production of wheat and barley is caused by continuing urbanization. Wheat and barley were previously produced in the winter months on rice land, as a second crop, but it is much more attractive now for farmers to take employment in industrial jobs as a major source of income and spend the minimum amount of time required in the spring and autumn planting and harvesting rice. At the present time only 4.7 per cent of all farm households are

wholly engaged in agriculture. Technical improvements in farm machinery and increased usage of transplanters, tractors, and harvesters make rice production much less labor intensive than previously. The improved technology has not however led to the hoped for increase in scale of farming, but has merely allowed the part time producers to devote less time to their farming operations and more time to off-farm employment.

This has caused a serious additional problem in Japanese agriculture, which is the age and composition of the farm labor force. Much of the farm work is done by women and older men. In 1970, 61.2 per cent of the farm workers were women, 26.3 per cent of which were over 50 years of age. Some 12 per cent of the total number of persons employed in agriculture were over 65 in 1970 and this percentage has increased since that time. Young men prefer industrial jobs and it is estimated that only 5 per cent or less of the farm work force is under 24 years of age.

As agriculture continues to decline in importance as the major source of farm household income, and if the farm work is left to the women and older men, agricultural planners in Japan will have an increasingly difficult time encouraging a shift in production to crops other than rice.

Increased purchases from abroad.— The Ministry of Agriculture and Forestry is also addressing itself to more obvious solution to Japan food problems, that of increasing purchases of major grains from abroad. To accomplish this aim a "Develop and import" scheme has been established which will promote agricultural imports from developing countries in S.E. Asia, parts of Africa and Central & South America. Technical and financial assistance will be given to increase agricultural production on a contractual basis with Japan. As there are a number of political implications in this proposal there has been some opposition expressed by the Japanese Foreign Ministry but the need to diversify sources of food supplies is so great, that these problems must not be allowed to interfere with the implementation of the plan.

In addition, the Ministry of Agriculture and Forestry is sending food survey teams to the major food producing areas of the world including N. America and Europe to assess long term potential increases in the supply capability of food producing countries. Both of these schemes are long term attempts to stabilize food procurement, but increased competition for world food resources to satisfy the rapidly increasing demand for high protein food and feed in Japan will likely increase consumer prices even further.

On August 10 it was announced that the Food Agency of the Ministry of Agriculture and Forestry, hopes to conclude a one year agreement with Canada for the purchase of 1.5 million tons of Canadian wheat. The agreement would secure approximately 30 per cent of the annual requirement of 5 million tons. While it would be desirable to expand wheat storage capacity in Japan, the high costs of both the commodity and storage facilities make it unlikely that the present 2.3 months inventory will be increased.

All of these factors underline the ongoing dilemma faced by this country, so dependent on foreign sources for agricultural products and at the same time experiencing a rapidly increasing demand based on the rising affluence of 103 million consumers.

Food production and procurement will continue to be a major pre-occupation of the Japanese and the current world food shortage has focused both public and government attention on the problem.

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last year's big crop. Adding the expected 75-million-bushel carryover this October 1 raises the supply to over a billion bushels for the first time since 1969-70. This makes more sorghum available for domestic and export needs and indicates a carryover in the 75 to 100 million bushel range on October 1, 1974.

Prospective oat supplies at 1.1 billion bushels are 9 per cent less than 1972-73; barley supplies are little changed. Supplies of both of these grains seem ample because of fairly large carryovers on July 1.

Despite a 20 per cent larger prospective soybean crop, high-protein feed for domestic use in 1973-74 will remain in tight supply because of sharply expanding export demand. Also, fish meal supplies will remain smaller than normal. Accordingly, soybean meal prices will stay high.

The hay supply for 1973-74 is estimated at 150 million tons, 2 per cent below last year. Supplies in the drought-stricken Pacific Northwest are extremely short. The supply per roughage consuming animal unit will drop sharply due to an increase in animal numbers. The U.S. farm price of 1973-crop hay in May-July averaged a record \$36 a ton, a fifth above a year earlier. The smaller supply and continued strong demand for roughage will again support strong hay prices in 1973-74.

CALENDAR OF COARSE GRAIN EVENTS

- August 2 The Canadian Wheat Board in its Instructions to the Trade No. 7 announced the Initial Payment Prices for wheat, oats and barley for the 1973-74 crop year.
- 17 Preliminary estimates place carryover stocks of the six major grains in all North American positions at July 31, 1973 as follows with 1972 totals in brackets in millions of bushels: wheat, 366.1(583.8); oats, 79.7(118.3); barley, 192.7(195.8); rye, 10.2(15.8); flaxseed, 7.8(16.0); and rapeseed, 20.1(43.1).
- September 7 Based on conditions at August 15, production of Canada's principal grain crops in 1973 was estimated as follows with 1972 totals and the ten-year (1962-71) averages, respectively in brackets, in millions of bushels: all wheat, 604.4(533.3, 614.2); oats for grain, 333.3 (300.2, 378.6); barley for grain, 484.1(518.4, 303.0); all rye, 14.4 (13.5, 15.4); flaxseed, 18.9(17.6, 23.7); and rapeseed, 55.3(57.3, 32.1).

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