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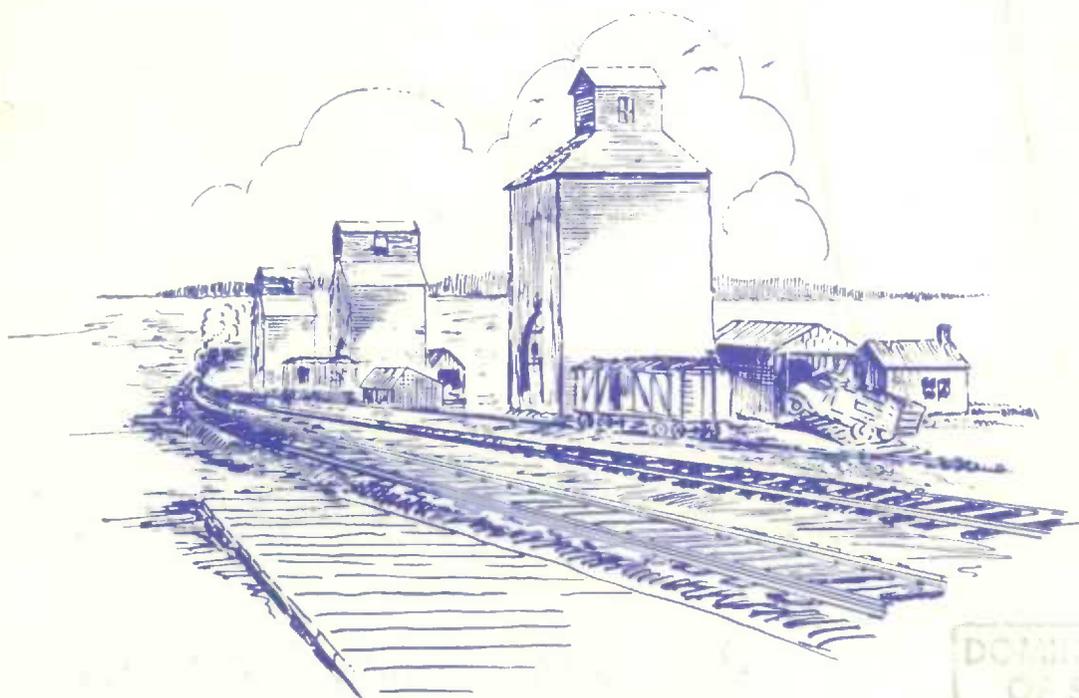


CANADA

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THE WHEAT REVIEW



DECEMBER 1960

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THE
WHEAT REVIEW

DECEMBER 1960

Published by Authority of
The Honourable George Hees, Minister of Trade and Commerce

Prepared in the Crops Section, Agricultural Division
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WORLD WHEAT SITUATION

Current Supplies Latest available estimates indicate that supplies of wheat remaining on or about December 1, 1960 in the four major exporting countries for export and for carryover at the end of their respective crop years amounted to 2,681.0 million bushels, exceeding by 8 per cent the 2,478.6 million available a year ago. Supplies at December 1, 1960, in millions of bushels, were held as follows, with last year's comparable figures in brackets: United States, 1,817.7 (1,648.8); Canada, 768.7 (705.7); Argentina, 34.0 (58.9); and Australia, 60.6 (65.2). Estimates for both years include on-farm stocks as well as those in commercial positions.

Supplies shown for December 1 in the two Southern Hemisphere countries consisted only of the carryover at the end of their crop years. The supply data to appear in the January issue of this publication will include the new Argentine and Australian production estimates for wheat.

Exports Total exports of wheat and wheat flour in terms of wheat from the four major exporting countries during the August-November period of the current Canadian crop year, at 384.5 million bushels, were some 32 per cent above the 290.9 million exported during the same months of 1959. Exports from United States, Argentina and Australia, were at higher levels this year than last, while those for Canada were lower. On a percentage basis, shipments from the four countries during August-November 1960 were shared as follows, with corresponding percentages for the same months of 1959 in brackets: United States, 53 (44); Canada, 28 (38); Argentina, 8 (6); and Australia, 11 (12). Shipments from each of the four countries during August-November of the current (Canadian) and ten preceding crop years are shown in the table below.

Exports of Wheat and Flour in Terms of Wheat, August-November, 1960
with Comparisons

August-November	United States	Canada	Argentina	Australia	Total
	- million bushels -				
1950	70.2	72.8	20.2	39.7	202.9
1951	155.2	115.0	20.3	39.2	329.7
1952	104.7	138.3	-	27.4	270.4
1953	70.0	103.4	43.2	22.0	238.6
1954	75.3	97.5	45.2	26.8	244.8
1955	73.9	81.0	43.4	29.7	228.0
1956	152.7	105.9	32.0	52.5	343.1
1957	131.3	104.9	31.5	31.6	299.3
1958	141.2	99.4	28.0	21.0	289.6
1959 <u>1/</u>	128.3	109.2	19.0	34.4	290.9
1960 <u>2/</u>	203.9	108.5	31.0	41.1	384.5

1/ Revised.

2/ Preliminary.

International Wheat Council
Review World Wheat
Situation

In its second review of the World Wheat Situation the International Wheat Council summarized the outlook for 1960-61 as follows:

The 1960-61 Supply Situation The world wheat crop (excluding mainland China) of 1960 at an estimated 221 million tons is expected to be the second largest crop on record. Production is expected to be 6 million tons

higher than in the preceding year and 27 million tons above the average of 1954-55 to 1958-59. The largest rise in production has occurred in North America. Production in Europe is, however, below the record level of the preceding year and the crop is below average in quality. Stocks carried forward into 1960-61 by the four major exporting countries are estimated at 52.9 million tons, only 0.6 million tons below the 1959 record level, and the higher level of production in North America has added further to surplus availabilities. With the larger world production, total world supplies, therefore, are likely to be 5.4 million tons higher.

Trade Outlook in 1960-61 As many importing countries produced average or below average crops, those in Western Europe in particular being of low quality, commercial demand for imports of wheat is expected to be higher. There is also likely to be an increased import demand of about 2.5 million tons by those Western European countries which are normally net exporters. It is estimated that the total intake into the less developed areas may rise and that shipments under the government assisted programmes of the United States, Canada and Australia may be at least 10.5 million tons. Thus world trade in 1960-61 may reach a new record of 37 million tons, 1 million tons higher than in 1959-60.

Outlook for Stocks in 1961 Although both world trade and total world utilization of wheat and wheat flour are likely to reach new record levels, stocks of wheat at the end of 1960-61 may be as high as 60 million tons.

Developments in National Wheat Policies There have been few changes in national policies affecting either producer price support levels or the supplementary measures such as milling quotas, import licensing and import levies in importing countries and export subsidies and monopoly powers granted to government agencies in exporting countries. A comparison of the level of producer prices between 1959-60 and 1960-61, for example, shows that 17 of the 26 cases considered have not altered, five have increased, two are lower and in two cases data are not yet available. In most cases milling quotas remained at the level established in 1959. In some instances, there has been a relaxation of government control of the wheat trade. In Switzerland the monopoly of the Government Wheat Board for the importation of wheat has been relinquished. The grain trade in Argentina has been returned to private trade and the Government Grain Board only retains purchasing obligations for price support purposes. Some moves towards easing the problems affecting the trade in wheat have also been made in Italy both through measures designed to reduce the acreage under wheat and the further reduction of the quantities which must be delivered to the state pools.

Crop Conditions
in Europe

According to a trade report dated January 10, 1961 the weather again has been wet over much of Europe during the past week and reports from a number of countries continue to indicate acreage curtailments owing to the recurring rains during the fall planting season. In addition, some sections report subnormal conditions for the fall grains. Snow has fallen in northern sections of the United Kingdom and over most of the remainder it has been wet and unfavorable for fall grains. In France an absence of frost has been favoring germination and growth of recent sowings. Below normal conditions still are reported in early planted sections. Rainy conditions have continued in Western Germany. An official report states that, assuming a normal winter-kill, the winter rye acreage will be about 12 per cent and winter wheat about three per cent below a year ago. In Italy it has continued wet and unfavorable for winter grains and reports continue to indicate smaller acreages to winter grains. Indications from Spain also are that the acreage to winter grains has been reduced owing to wetness during much of the seeding season.

International Wheat Agreement
 Cumulative Totals of Commercial Purchases by Importing Countries from Exporting Countries
 Crop Year 1960-61

Importing Countries	EXPORTING COUNTRIES							Total Purchases
	Canada 1/	Argentina 2/	Australia 2/	France 2/	Italy 2/	Sweden 2/	U.S.A. 2/	
	- thousand bushels -							
Austria	362	-	336	-	-	-	-	698
Belgium & Luxembourg	4,445	21	-	63	-	-	764	5,293
Brazil	-	3,436	-	-	-	-	735	4,171
Costa Rica	432	-	-	-	-	-	305	737
Cuba	599	-	-	-	-	-	951	1,550
Dominican Republic	391	-	-	-	-	-	-	391
El Salvador	115	-	-	-	-	-	443	558
Germany	17,137	377	323	5,095	6	1,597	2,347	26,882
Greece	27	-	1	-	-	-	28	56
Guatemala	54	-	-	-	-	-	357	411
Haiti	2	-	-	-	-	-	-	2
Honduras Republic	29	-	-	-	-	-	208	237
Iceland	3	-	-	-	-	-	1	4
India	-	-	764	-	-	-	2	766
Indonesia	-	-	1,381	32	-	-	79	1,492
Ireland	358	-	623	-	-	-	52	1,033
Israel	1,631	-	-	-	-	-	508	2,139
Japan	25,572	-	4,755	-	-	-	10,984	42,311
Korea	-	-	-	-	-	-	-	-
<u>Netherlands</u>	4,244	-	-	42	-	-	4,293	8,579
Netherlands Territories ...	62	-	23	3	-	-	240	328
New Zealand	-	-	1,522	-	-	-	-	1,522
Norway	2,250	-	224	-	-	11	259	2,744
Panama	150	-	-	3	-	-	260	413
Peru	1,442	367	-	2	-	-	842	2,653
Philippines	932	-	214	-	-	-	1,593	2,739
<u>Portugal</u>	4	-	-	318	-	-	2,825	3,147
Portuguese Territories	328	-	10	37	-	-	483	858
Rhodesia & Nyasaland	69	-	1,144	4	-	-	-	1,217
Saudi Arabia	4	-	82	-	5	-	483	574
Switzerland	4,215	22	-	769	-	-	375	5,381
Union of South Africa	-	-	-	-	-	-	-	-
United Arab Republic	3	-	-	-	88	-	1,062	1,153
<u>United Kingdom</u>	45,406	429	11,276	1,200	-	-	7,563	65,874
U.K. Territories	3,420	-	2,117	384	-	-	2,097	8,018
Vatican City	101	-	-	-	-	-	-	101
Venezuela	1,822	-	-	-	-	-	3,254	5,076
Totals	116,609	4,652	24,795	7,952	99	1,608	43,393	199,108
Percentage of Total Sales by Exporting Countries	58.57	2.34	12.45	3.99	.05	.81	21.79	100.00

NOTE: Mexico and Spain - No sales reported.

1/ Canadian sales through November 30, 1960.

2/ Sales recorded by International Wheat Council through October 26, 1960.

CANADIAN SITUATION

Supply Position Total estimated supplies of wheat for the 1960-61 crop year are placed at 1,027.2 million bushels, consisting of the August 1 carryover of 537.6 million and the 1960 production of 489.6 million bushels. Supplies of the size indicated represent an increase of 7 per cent over the 1959-60 total of 962.5 million bushels. After deducting an estimated 150.0 million bushels for anticipated domestic requirements, supplies available for export and for carryover during 1960-61 would amount to 877.2 million bushels, 8 per cent above the 814.9 million in 1959-60.

Combined exports of wheat as grain and wheat flour in terms of grain equivalent during the August-November period of the current crop year amounted to 108.5 million bushels compared with 109.2 million exported during the same months of the preceding crop year. The balance remaining on December 1, 1960 for export and for carryover, amounted to 768.7 million bushels, 9 per cent more than the December 1, 1959 total of 705.7 million.

Canadian Wheat Supplies

Item	1959-60 <u>1/</u>	1960-61 <u>2/</u>
	- million bushels -	
Carryover in North America at beginning of crop year (August 1)	549.0	537.6
New Crop	413.5	489.6
Imports of wheat for domestic use, August-September ..	<u>3/</u>	<u>3/</u>
Total estimated supplies	962.5	1,027.2
Less estimated domestic requirements for crop year ...	147.6	150.0
Available for export and for carryover	814.9	877.2
Deduct:		
Exports of wheat in bulk, August-November <u>4/</u>	95.5	95.0
Exports of bagged seed wheat, August-November <u>5/</u> ...	0.9	1.0
Total exports of wheat as grain	96.4	96.1
Exports of wheat flour in terms of wheat, August - November <u>5/</u>	12.8	12.4
Total exports of wheat and wheat flour	109.2	108.5
Balance on December 1 for export and for carryover ...	705.7	768.7

1/ Subject to revision.

2/ Preliminary.

3/ Less than 50,000 bushels.

4/ As reported by the Board of Grain Commissioners. (Includes overseas clearances and imports into the United States).

5/ Customs returns, 1959-60 adjusted for time lag.

Farmers' deliveries of wheat (both east and west) up to December 21 of the 1960-61 crop year amounted to 124.5 million bushels exceeding by 6 per cent last year's corresponding total of 117.4 million. Of the current total, some 19.8 million bushels was accounted for by marketings of durum wheat in contrast to only

6.0 million bushels of this type delivered during a comparable period a year ago. During the five weeks November 17 to December 21 total marketings of wheat (both east and west) amounted to 39.6 million bushels while disappearance of Canadian wheat through licensed elevator channels (overseas clearances, plus imports into the United States, plus Canadian domestic use and including grain milled for subsequent export) during the same five weeks totalled some 38.3 million bushels. With primary deliveries exceeding export and domestic requirements by a small margin, the total visible supply of Canadian wheat increased only from 422.5 million bushels at the week ending November 16 to a level of 423.7 million at December 21.

The total visible supply of Canadian wheat at December 21, 1960 was 12 per cent greater than the comparable 1959 total of 379.9 million bushels and 13 per cent more than the 1958 figure of 376.5 million. Stocks in country elevators, at 249.0 million bushels, represented 59 per cent of the total and exceeded by considerable margins both the 235.7 million of a year ago and 225.1 million of two years ago. Interior terminal stocks at December 21, 1960 amounted to 11.1 million bushels and registered declines from both the 1959 and 1958 comparable totals of 12.1 million and 13.2 million bushels, respectively. "In transit rail" (Western Division) accounted for 14.5 million bushels in contrast to 7.5 million of a year ago and 11.0 million two years ago. Supplies in Lakehead position at December 21, 1960 totalled 39.5 million bushels, 40 per cent greater than the comparable 1959 total of 28.3 million and 37 per cent more than the 1958 figure of 28.8 million. The 40.9 million bushels in Bay, Lake and Upper St. Lawrence ports exceeded both the 37.6 million of a year ago and 36.1 million of two years ago. Supplies in Lower St. Lawrence and Maritime ports amounted to 27.9 million bushels, 55 per cent greater than the 1959 total of 18.0 million and 32 per cent more than the 21.2 million in 1958. Some 18.7 million bushels were in "Storage Afloat" compared with 17.6 million a year ago and 19.5 million two years ago. Supplies in West Coast ports (Vancouver-New Westminster and Victoria) totalled 6.5 million bushels, representing a decline from the 1959 comparable level of 7.4 million but exceeding the 1958 total of 6.3 million.

November 1960 Exports of
Wheat and Flour Total
28.2 Million Bushels

Combined exports of wheat in bulk, bagged seed wheat, and wheat flour in terms of grain equivalent during November 1960 amounted to 28.2 million bushels, substantially greater than the October total of 23.8 million but

less than the November 1959 figure of 32.9 million bushels. The ten-year (1949-58) average exports of these commodities for the month of November was 28.4 million bushels. Exports of wheat in bulk (as reported by the Board of Grain Commissioners) during November 1960, at 23.2 million bushels, were above the 21.2 million exported during the preceding month but below the November 1959 total of 29.2 million. Exports of bagged seed wheat during November 1960, based on Canadian Customs returns, amounted to 497 thousand bushels compared with the October figure of 159 thousand and the November 1959 total (adjusted to remove time lag) of 532 thousand bushels. Customs returns also indicate that the equivalent of 4.4 million bushels of wheat was exported in the form of flour during November 1960, representing increases over both the October total of 2.4 million and the adjusted November 1959 exports of 3.1 million.

Cumulative exports of wheat in bulk during the August-November period of the 1960-61 crop year amounted to 95.0 million bushels, almost the same as the comparable 1959 total of 95.5 million. The United Kingdom, remaining in its position as Canada's leading market for wheat, received shipments amounting to 33.5 million bushels and representing 35 per cent of the four-month total. During the August-November period of the 1959-60 crop year shipments of wheat to the United Kingdom amounted to 32.8 million bushels and accounted for 34 per cent of the total. Other principal markets for Canadian wheat in bulk during the first four months of the current crop year, with figures for the same period of the preceding crop year

in brackets, were as follows, in millions of bushels: Japan, 16.0 (13.5); Federal Republic of Germany, 13.5 (12.8); Italy, 9.2 (2.1); Belgium-Luxembourg, 5.0 (5.1); Switzerland, 4.2 (2.2); Netherlands, 3.3 (4.3); and France, 3.0 (1.4). Customs exports of bagged seed wheat during August-November of the current crop year amounted to 1.0 million bushels compared with the adjusted total of 0.9 million exported during the same months of the preceding year.

Cumulative exports of wheat flour during the first four months of the 1960-61 crop year, based on Customs returns, were the equivalent of 12.4 million bushels and represented only a slight decrease from the adjusted August-November 1959 total of 12.8 million bushels. As with bulk wheat, the United Kingdom was also the major market for Canadian wheat flour. Shipments of wheat flour to that country during the period under review amounted to the equivalent of 4,116 thousand bushels and accounted for 33 per cent of the August-November 1960 total. During the same months of the 1959-60 crop year shipments of wheat flour to the United Kingdom amounted to the equivalent of 4,787 thousand bushels and represented 38 per cent of the total. Other leading markets for Canadian wheat flour in terms of grain equivalent during the August-November period of the 1960-61 crop year, with revised data for the same months of the preceding crop year in brackets, were as follows, in thousands of bushels: Lebanon, 1,285 (19); Philippines, 876 (1,819); Ghana, 564 (653); Trinidad, 489 (800); Norway, 461 (nil); Jamaica, 458 (536); United States, 387 (480); Japan, 370 (353); Cuba, 335 (8); Leeward-Windward Islands, 334 (349); Hong Kong, 265 (277); Costa Rica, 233 (221); and Indonesia, 206 (213).

1960 Season of Navigation Closed at Canadian Lakehead

The 1960 season of navigation at the Canadian Lakehead, which opened on April 10, closed on December 13. Preliminary reports for the 1960 season place the lake shipping total at 278.7 million bushels of the five principal grains, a decline of 7.5 million bushels or 3 per cent from the 286.2 million recorded for the 1959 season. With the exception of flaxseed each of the grains shared in the decline as indicated by the following individual grain totals, in millions of bushels, with 1959 season totals in brackets: wheat, 184.5 (187.1); oats, 27.1 (32.1); barley, 55.0 (55.7); rye, 3.6 (4.7); and flaxseed, 8.4 (6.6).

Lake Shipments of Canadian Grain from Fort William-Port Arthur
Season of Navigation, 1950-60

Year	Wheat	Oats	Barley	Rye	Flaxseed	Total
	- thousand bushels -					
1950	137,048	27,358	26,762	7,219	3,502	201,889
1951	201,424	58,325	48,332	7,014	2,194	317,289
1952	246,093	92,704	96,863	9,089	6,058	450,808
1953	209,118	98,202	110,472	17,677	6,283	441,752
1954	140,705	58,473	80,672	8,480	4,372	292,702
1955	141,600	31,902	67,905	11,085	9,970	262,461
1956	206,136	47,517	91,990	11,070	10,292	367,005
1957	157,217	48,788	56,706	4,274	11,533	278,517
1958	191,957	41,833	74,322	5,310	8,683	322,105
1959	187,103	32,097	55,686	4,707	6,617	286,209
1960	184,480	27,100	55,035	3,645	8,421	278,681

Grain Movement Via
the St. Lawrence
Seaway 1960

Commissioners for Canada, for the week ending December 14, 1960.

The following analysis of Canadian and United States grain movements through the St. Lawrence Seaway system in 1960 was extracted from the Weekly Bulletin "Canadian Grain Position" published by the Statistics Branch of the Board of Grain

Direct Overseas Shipping To illustrate the effect of the Seaway on the direct movement of grain from the Lakehead to the United Kingdom and other European markets, a comparison in the table below shows the all-grain totals for several seasons before, and the two seasons after, the opening of the Seaway.

<u>Season</u>	<u>Million Bushels</u>	<u>Season</u>	<u>Million Bushels</u>
1956	0.7	1959	16.4
1957	-	1960	20.6
1958	1.1		

During the 1960 season, 79 ocean vessels called at the Lakehead and carried 20.6 millions of Canadian grain, an average 261,000 bushel load per cargo, as against 71 ocean vessels and 231,000 bushels cargo average in the previous season. The number of ocean vessels moving directly into the Atlantic Ocean route, more than doubled during 1960 - 39 "non stop" cargoes as against 15 previously. The remaining 40 vessels topped off at St. Lawrence River ports. Note: The totals mentioned above are based on wheat to flaxseed tabulations. Not included are 12,000 tons of screenings and 47,000 bushels of buckwheat direct overseas.

Direct Shipping to St. Lawrence Export Points The gradual elimination of the traditional transfer operations to canalers at Lower Lake ports continued during the 1960 season, and direct one run shipments to Montreal, Quebec, Baie Comeau, etc., represented 80 per cent of the St. Lawrence terminal vessel receipts. The proportion calculated for last season's final returns was 50 per cent, while the 1958 - before the opening - showed only 4 per cent. Consequently the receipts from Lower Lake ports, such as Port Colborne, Kingston and Prescott, registered a further sharp drop and were reported at only 22.1 millions or 20 per cent. The volume moved by rail ex Bay ports to St. Lawrence points continued the declining trend and represented 10.5 per cent of the combined total receipts at St. Lawrence ports. The proportion was 15 per cent for 1959 and 22 per cent in 1958 (before the opening).

Foreign Ocean Vessels in Coasting Trade The direct movement to St. Lawrence ports, as outlined above, was partly carried by foreign registry ocean vessels; some 18 salties plied in the transfer operations of Canadian grain, several of them making two to four runs during the season, to a total of 50 cargoes and 15.5 million bushels (wheat to flaxseed) and 5 thousand tons of screenings. Last season's saltie participation was as follows: 15 vessels, 41 cargoes and 15.4 million bushels.

Direct Shipments to Maritimes The Maritime ports of Halifax, Shediac, etc. received 3.8 millions of grain from one run vessels ex Lakehead, an increase of over 2 millions from the volume moved in this manner during the previous season.

United States Grain Movement The United States grain movement continued to utilize the Seaway facilities to full extent and supported by rapid changes in Duluth-Superior harbour loading structures reached a scope high above the expected levels. Approximately 97.4 million bushels of U.S. grain was shipped as a direct export overseas from Duluth-Superior (85.3 millions) and Chicago (11.7 millions) and small parcels (0.4 millions) from Toledo, representing an increase of 12.4 million bushels over the 85 millions exported through the Seaway by these two Lake ports during 1959. The Canadian ports at Lower St. Lawrence River again contributed to a considerable

extent to U.S. Seaway exports and loaded, in transfer or topping-off operations, 26.3 million bushels of U.S. grain for overseas, almost in line with the 26.7 millions the previous season. Little change was reported in Eastern elevator handlings of U.S. grain for Canadian Domestic consumption (7.0 millions - chiefly corn - compared with 7.3 millions previously), while the transshipments to U.S. eastern points decreased from 3.1 millions for the previous season to only 0.1 millions currently. Of the season's U.S. grain total, reported by the U.S. Department of Agriculture as "inspected for shipment to Canada" at 52 million bushels, the licensed elevators in the Canadian eastern sector received 9.5 millions from Duluth, 14.1 millions from Toledo, 8.8 millions from Chicago and 4.2 millions from other U.S. ports.

Farmers' Marketings Deliveries of wheat from farms in the Prairie Provinces up to December 21 of the current crop year amounted to 121.7 million bushels, representing an increase of 5 per cent over the comparable 1959 total of 116.4 million but 26 per cent below the ten-year (1949-58) average for the period of 165.2 million bushels.

Farmers' Marketings 1/ of Wheat in the Prairie Provinces 1960-61

Week Ending	Manitoba	Saskatchewan	Alberta	Total	Last Year
- bushels -					
August 10, 1960 ..	56,492	549,061	65,314	770,867	507,483
17	97,814	2,300,238	673,986	3,072,038	847,225
24	774,837	4,415,360	867,207	6,057,404	2,245,462
31	326,880	5,465,131	842,507	6,634,518	3,198,107
September 7	1,198,590	6,461,760	1,129,071	8,789,421	3,157,005
14	857,395	6,813,286	1,362,871	9,033,552	3,703,190
21	461,086	4,005,772	1,905,068	6,371,926	4,961,995
28	166,115	1,800,728	1,449,760	3,416,603	3,229,119
October 5	228,241	2,901,058	1,500,157	4,629,456	6,506,983
12	240,614	2,399,876	1,405,128	4,045,618	5,284,249
19	273,511 <u>2/</u>	3,202,723	1,310,985	4,787,219 <u>2/</u>	3,350,506
26	413,034	3,507,393	1,499,035	5,419,462	5,218,997
November 2	675,013	3,908,460	1,779,941	6,363,414	6,230,129
9	549,105	4,299,326	2,080,662	6,929,093	7,414,222
16	537,546 <u>2/</u>	3,801,379	1,446,072	5,784,997 <u>2/</u>	8,989,706
23	706,278	4,569,217	2,065,549	7,341,044	10,723,488
30	1,106,931	5,478,361	1,452,117	8,037,409	10,310,420
December 7	926,079	4,836,047	1,232,216	6,994,342	12,276,917
14	898,376	4,826,469	1,680,237	7,405,082	9,082,369
21	1,734,069	5,863,412	2,243,171	9,840,652	9,123,205
Totals	12,228,006	81,505,057	27,991,054	121,724,117	116,360,777
Average similar period:					
1949-58	21,142,862	100,271,086	43,829,253	165,243,201	

1/ Includes receipts at country, interior private and mill elevators, interior semi-public terminals and platform loadings.

2/ Revised.

Delivery Policy

Purchase of Registered or Certified Seed Wheat, Oats, Barley, Rye, Flaxseed or Forage Seeds, and Commercial Pembina Wheat by

Producers In its Instructions to the Trade re Quotas (General) No. 16, under date of December 15, 1960, the Canadian Wheat Board announced in part that arrangements will be made effective January 2nd, 1961, which may be utilized by producers in acquiring registered or certified seed wheat, oats, barley, rye, flaxseed and commercial Pembina wheat for seeding purposes.

Effective January 2nd, 1961, a producer desiring to purchase up to One Hundred and Fifty (150) bushels of registered or certified seed wheat, oats, barley, rye, flaxseed, or commercial Pembina wheat, (or any combination of these grains up to 150 bushels) through the Crop Improvement Associations, the Crop Testing Plan, from a bona fide dealer in registered and certified seed, or from a registered seed grower, to be used for seeding purposes on his farm, may deliver and sell to an elevator company, in payment or in part payment for such seed, a quantity not exceeding Four Hundred (400) bushels of any kind of commercial grain in excess of the then prevailing or future delivery quotas in effect at the delivery point designated in the producer's permit book. This instruction was subject to a number of regulations, details of which may be found by referring to already-mentioned Instruction.

Overdelivery Privileges on Commercial Pembina Wheat

The Canadian Wheat Board in its Instructions to the Trade, re Quotas (General) No. 18 under date of December 15, 1960 announced in part that to assist in the distribution of Pembina seed wheat the Board will, on receipt of a written application from a producer, give consideration toward allowing commercial Pembina Wheat that is covered by a Control Sample Certificate indicating an assigned seed grade of Canada No. 1 or 2 Seed issued by the Plant Products Division, Canada Department of Agriculture, to be delivered outside delivery quota regulations to a bona fide seed dealer, up to One Hundred and Fifty (150) bushels. These applications must show the Control Sample Certificate number, also the dealer purchasing the seed.

Supplementary Quota on Soft White Spring Wheat

The Canadian Wheat Board in its Instructions to the Trade, re Quotas (General) No. 19 under date of December 29, 1960 announced in part that in order to obtain sufficient quantities of Soft White Spring Wheat to meet mill requirements, the supplementary quota of ten (10) bushels per acre seeded to Soft White Spring Wheat as authorized in Instructions to the Trade re Quotas (General) No. 12 of October 21st, 1960, will be increased to fifteen (15) bushels per acre seeded to Soft White Spring Wheat, effective January 2nd, 1961.

General Quota Position

By January 5, 1961 out of a total of 1,997 shipping points in the Western Division, the Canadian Wheat Board had placed 230 points on a quota of 3 bushels per specified acre, 893 points were on a 2-bushel quota and 874 were on a one-bushel quota.

Summary of Elevator Shipping Points in the Western Division as at January 5, 1961

Province	General Quota in Bushels per Specified Acre			Total
	One	Two	Three	
Ontario	-	-	2	2
Manitoba	245	96	23	364
Saskatchewan	439	494	146	1,079
Alberta	190	303	54	547
British Columbia	-	-	5	5
All Provinces	874	893	230	1,997

Visible Supply of Canadian Wheat, December 21, 1960
Compared with Approximately the Same Date, 1958 and 1959

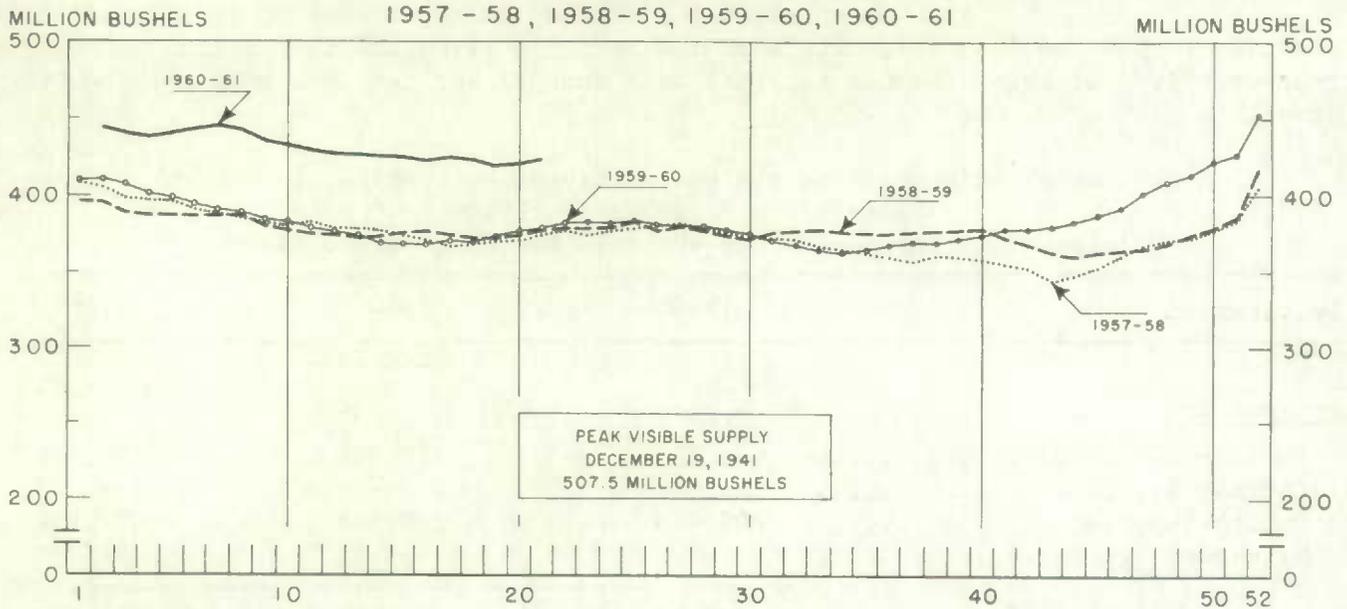
Position	1958	1959	1960
- thousand bushels -			
Country elevators - Manitoba	24,109	26,763	32,229
Saskatchewan	125,867	131,683	143,921
Alberta	75,114	77,288	72,843
Totals	225,090	235,735	248,993
Interior private and mill	7,384	7,889	7,616
Interior terminals	13,151	12,126	11,105
Vancouver-New Westminster	6,209	7,138	6,103
Victoria	138	284	409
Churchill.....	4,916	4,871	4,766
Fort William-Port Arthur	28,810	28,265	39,528
Storage Afloat	100	-	-
In transit rail (Western Division)	10,963	7,511	14,500
Bay, Lake and Upper St. Lawrence ports	36,147	37,613	40,867
Lower St. Lawrence and Maritime ports	21,175	18,018	27,930
Storage Afloat	19,469	17,630	18,748
In transit rail (Eastern Division)	2,955	2,772	3,007
United States ports	-	22	99
Totals	376,509	379,874	423,672

Grading of Wheat Inspected, August-November 1960 with Comparisons

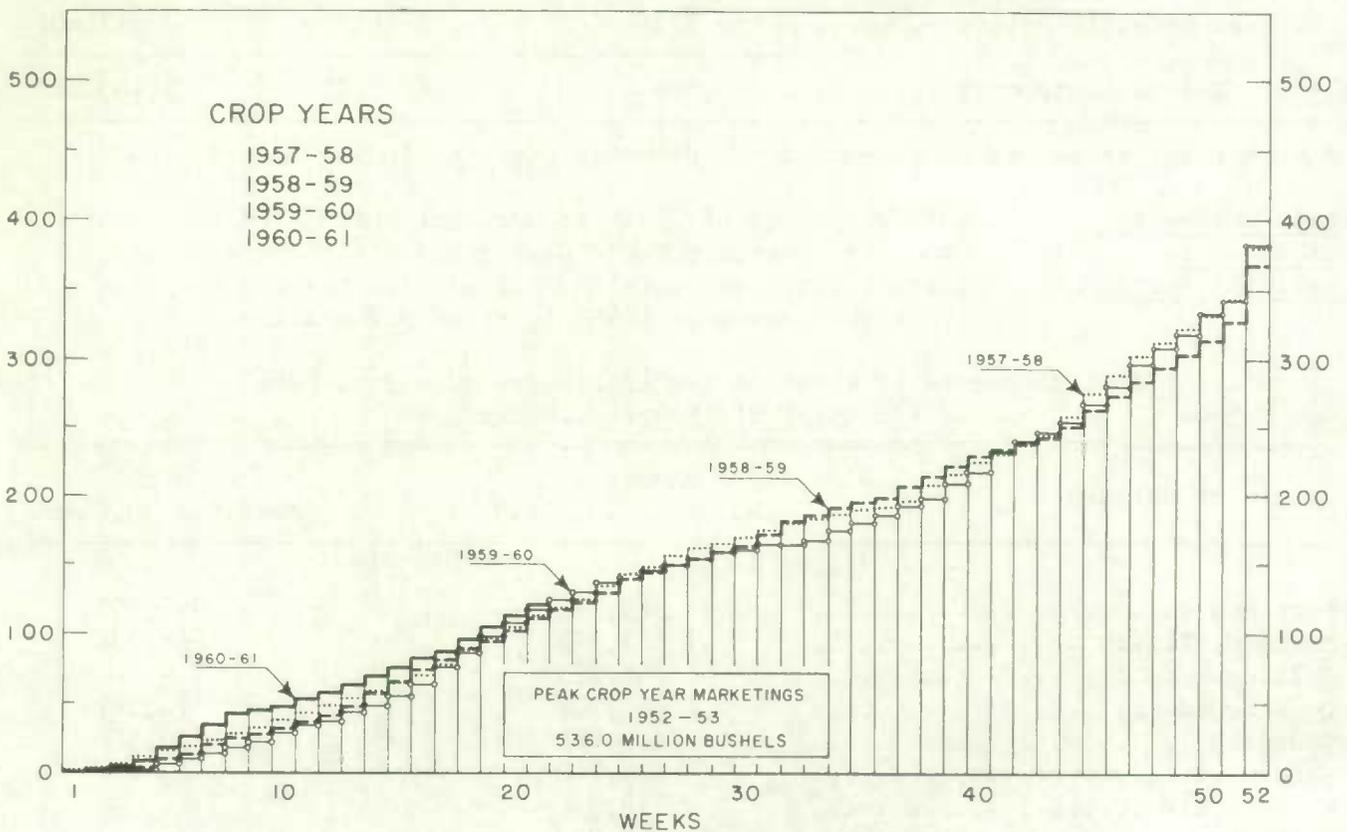
Grade	Crop Year		August-November			
	Average	1959-60	1959		1960	
	1954-55 1958-59		cars	per cent	cars	per cent
No. 1 Man. Northern	2.2	1.3	870	1.3	570	0.9
No. 2 Man. Northern	30.2	25.8	18,505	27.9	11,682	18.6
No. 3 Man. Northern	27.1	29.3	18,995	28.6	13,493	21.5
No. 4 Man. Northern	13.5	10.8	11,624	17.5	9,054	14.4
No. 5 Wheat	9.4	3.7	2,345	3.5	5,633	9.0
No. 6 Wheat	2.7	0.3	230	0.3	754	1.2
Feed Wheat	0.4	1/	5	1/	5	1/
Others Red Spring	9.2	21.2	6,453	9.7	6,788	10.8
C.W. Garnet	0.4	0.1	108	0.2	9	1/
C.W. White Spring	0.1	0.1	39	0.1	111	0.2
C.W. Mixed Wheat	0.1	1/	24	1/	44	0.1
Alberta Winter	0.4	0.3	587	0.9	98	0.2
Nos. 1-6 C.W. Amber Durum .	4.3	6.8	6,330	9.5	14,292	22.8
Others C.W. Amber Durum ...	0.1	0.3	204	0.3	237	0.4
Totals	100.0	100.0	66,319	100.0	62,770	100.0
Gross bushels (approx.) ...				125,209,000		116,941,000

1/ Less than .05 per cent.

WEEKLY VISIBLE SUPPLY OF CANADIAN WHEAT



CUMULATIVE RECORD OF WHEAT MARKETINGS IN THE PRAIRIE PROVINCES BY WEEKS



(Data in both charts for crop years beginning August 1)

Rail Shipments of Wheat from Fort William-Port Arthur, 1957-58—1960-61

Month	1957-58	1958-59	1959-60	1960-61
	- bushels -			
August	33,297	33,123	34,383	14,717
September	42,125	15,692	31,690	19,227
October	34,937	68,834	30,904	5,417
November	67,894	205,061	8,383	24,000
December	232,252	214,398	25,355	
January	525,238	684,845	103,087	
February	178,204	173,387	23,878	
March	191,312	230,705	18,826	
April	215,546	243,292	64,156	
May	33,839	44,783	19,513	
June	35,368	10,128	25,234	
July	37,984	33,696	26,803	
Totals	1,627,996	2,007,944	412,212	

Distribution of Rail Shipments of Wheat from Fort William-Port Arthur, November 1960

Grade	Quebec	Ontario
	- bushels -	
4 Northern	5,833	6,000
5 Wheat	-	1,500
Amber Durum	4,000	6,500
Others	-	167
Totals	9,833	14,167

Overseas Exports of Canadian Grain by Ports of Loading, August 1-December 21, 1960
with Comparisons

Ports	Wheat ^{1/}	Oats	Barley	Rye	Flaxseed	Rapeseed ^{2/}
	- bushels -					
<u>Pacific Seaboard</u>						
Vancouver-New Westminster..	36,041,794	-	3,183,025	314,510	2,521,636	1,797,234
Victoria	1,013,714	-	-	-	-	997,056
Prince Rupert	-	-	943,133	-	-	-
<u>Churchill</u>	19,041,157	108,376	-	-	-	-
<u>Lakehead Direct</u>	5,861,013	65,881	1,218,199	-	1,732,224	-
<u>St. Lawrence</u>						
Montreal	30,451,867	668,058	41,326	600	2,162,918	154,759
Sorel	4,049,910	-	-	-	-	-
Three Rivers	3,897,428	-	-	-	-	-
Quebec	2,914,582	-	-	-	-	-
Baie Comeau	6,265,817	-	-	-	-	-
<u>Maritime Ports</u>						
West Saint John	820,949	-	-	-	-	-
Halifax	470,400	-	-	-	-	-
Totals	110,828,631	842,315	5,385,683	315,110	6,416,778	2,949,049
August 1 - December 23, 1959.	110,868,308	1,714,605	11,463,380	89,856	4,324,079	852,680

^{1/} Excluding bagged seed.

^{2/} In bushels of 50 pounds.

Freight Assistance Shipments Claims filed for payment up to November 30, 1960 represent the movement of some 4,713 thousand bushels of wheat from the Prairie Provinces to Eastern Canada and British Columbia under the freight assistance policy during the August-October period of the 1960-61 crop year. During the same months of the 1959-60 crop year claims had been filed for a total of 5,243 thousand bushels, indicating on the assumption of approximately the same rate of submission of claims during both the current and preceding crop years that the August-October shipments of wheat under the policy were running about 10 per cent below those of 1959. Revised data on the 1959 August-October shipments of wheat based on claims submitted up to November 30, 1960 place the three-month total at 5,844 thousand bushels. The bulk of the shipments during the current three-month period under review went to destinations in Ontario and Quebec.

Provincial Distribution of Wheat Shipments under the Freight Assistance Policy
August - October 1960 and 1959

Month	Nfld.	P.E.I.	N.S.	N.B.	Que.	Ont.	B.C.	Total
- thousand bushels -								
August, 1960	13	21	84	52	547	771	170	1,659
September	13	19	155	57	553	710	259	1,766
October	11	10	124	39	469	582	53	1,288
Totals <u>1/</u>	37	50	363	148	1,569	2,064	482	4,713
Same period 1959:								
Preliminary <u>2/</u>	43	54	337	220	1,829	2,385	375	5,243
Revised <u>1/</u>	53	58	345	229	1,935	2,487	738	5,844

Preliminary data on millfeed shipments under the freight assistance policy indicate shipments of 135,948 tons during the August-October period of the current crop year. During the same three months of 1959 claims had been filed for a total of 147,705 tons, indicating on the assumption of approximately the same rate of submission of claims during both the current and preceding crop years that the August-October shipments of millfeeds under the policy were running about 8 per cent below those of 1959. Revised data on the 1959 August-October shipments of millfeeds based on claims submitted up to November 30, 1960 place the three-month total at 161,112 tons. As with freight-assisted shipments of wheat, the greater portion of the millfeed shipments during the period under review went to destinations in Ontario and Quebec.

Provincial Distribution of Millfeed Shipments under the Freight Assistance Policy
August - October 1960 and 1959

Province	1959		1960
	Preliminary <u>2/</u>	Revised <u>1/</u>	Preliminary <u>1/</u>
- tons -			
Newfoundland	897	1,104	947
Prince Edward Island	2,021	2,161	1,815
Nova Scotia	7,156	7,449	8,761
New Brunswick	9,324	9,680	7,501
Quebec	81,847	85,310	64,721
Ontario	40,407	43,587	43,829
British Columbia	6,053	11,821	8,374
Totals	147,705	161,112	135,948

1/ Based on claims filed up to November 30, 1960.

2/ Based on claims filed up to November 30, 1959.

Monthly Exports of Canadian Wheat and Wheat Flour

Year and Month	Wheat in Bulk <u>1/</u>	Bagged Seed Wheat <u>2/</u>	Total Wheat	Wheat Flour <u>2/</u> <u>3/</u>	Total <u>3/</u> Wheat and Wheat Flour
- thousand bushels -					
<u>1958-59</u>					
August	23,152	237	23,389	2,443	25,833
September	16,112	201	16,314	2,232	18,546
October	25,532	188	25,720	3,656	29,375
November	21,437	299	21,736	3,921	25,658
December	19,864	451	20,315	3,196	23,511
January	17,893	607	18,500	2,820	21,320
February	17,685	956	18,641	3,035	21,676
March	18,579	1,280	19,859	2,705	22,564
April	18,918	738	19,657	3,057	22,714
May	29,040	31	29,071	3,529	32,600
June	27,842	72	27,913	3,003	30,916
July	16,101	204	16,305	3,529	19,834
Totals	252,155	5,266	257,421	37,125	294,546
<u>1959-60</u>					
August	21,203	157	21,360	3,090	24,451
September	22,606	133	22,739	2,873	25,611
October	22,440	124	22,565	3,705	26,270
November	29,239	532	29,771	3,093	32,864
December	20,262	881	21,144	3,168	24,311
January	13,220	809	14,029	2,522	16,551
February	16,462	788	17,250	2,734	19,984
March	17,102	991	18,093	2,737	20,830
April	15,373	871	16,244	3,281	19,525
May	21,210	224	21,434	3,522	24,956
June	21,011	26	21,037	3,323	24,359
July	14,589	67	14,656	2,923	17,578
Totals	234,717	5,604	240,321	36,970	277,291
<u>1960-61 ^{4/}</u>					
August	23,908	144	24,052	2,795	26,848
September	26,742	244	26,986	2,732	29,719
October	21,172	159	21,331	2,448	23,779
November	23,224	497	23,720	4,441	28,161
Totals	95,045	1,044	96,090	12,417	108,506

1/ Export clearances including shipments to the United States compiled by the Statistics Branch, Board of Grain Commissioners for Canada.

2/ Compiled from Canadian Customs returns, 1958-59 and 1959-60 adjusted to remove effect of time lag in reporting.

3/ In terms of wheat equivalent. Wheat flour conversion rate: 2.3 bushels per cwt.

4/ Subject to revision. Unadjusted Customs returns.

Exports of Canadian Wheat and Wheat Flour by Destination 1960-61

Destination	August	November		August-November	
	Wheat Flour 1/	Wheat Flour 2/	Wheat 3/	Wheat Flour 2/	Wheat 3/
COMMONWEALTH COUNTRIES					
- bushels -					
<u>Western Europe</u>					
United Kingdom	791,524	1,540,333	7,870,058	4,116,484	33,504,640
Gibraltar	9,531	4,122	-	13,653	-
Malta and Gozo	-	-	-	-	425,600
<u>Middle East</u>					
Kuwait	-	-	-	2,576	-
British Middle East, nes	1,704	1,546	-	4,538	-
<u>Other Africa</u>					
Ghana	195,781	156,731	-	564,146	-
Nigeria	46,697	46,793	-	187,155	-
Rhodesia - Nyasaland	1,978	5,092	11,450	12,261	33,850
Sierra Leone	41,538	34,091	-	130,376	-
Tanganyika	345	1,495	-	1,955	-
British Africa, nes	1,840	-	-	11,385	-
<u>Other Asia</u>					
Hong Kong	68,218	96,531	-	264,896	154,000
Malaya - Singapore	35,958	51,984	-	181,849	-
Pakistan	-	-	1,209,787	230	1,209,787
British East Indies, nes	-	853	-	2,817	-
<u>Oceania</u>					
Fiji	-	-	-	3,393	-
British Oceania, nes	-	-	-	414	-
<u>South America</u>					
British Guiana	51,389	40,207	-	177,935	-
<u>Central America and Antilles</u>					
Bahamas	32,334	17,710	-	81,841	-
Bermuda	12,052	6,833	-	39,583	-
British Honduras	-	115	-	3,556	-
Barbados	20,003	9,773	-	75,309	-
Jamaica	83,612	134,021	-	458,452	-
Leeward-Windward Islands	79,345	88,697	-	334,266	-
Trinidad	142,448	179,145	-	489,031	-
Totals, Commonwealth Countries	1,616,297	2,416,072	9,091,295	7,158,101	35,327,877
<u>OTHER COUNTRIES</u>					
<u>Western Europe</u>					
Austria	-	-	-	-	802,026
Belgium-Luxembourg	18,547	16,178	1,410,749	56,060	5,014,371
France	-	-	920,134	-	3,012,251
Germany, Federal Republic	-	-	4,924,159	-	13,524,778
Greece	1,267	-	22,400	1,267	22,400
Iceland	1,610	1,610	-	8,211	-
Ireland	-	-	115,733	-	283,733
Italy	-	-	2,398,435	-	9,175,416
Netherlands	690	-	828,730	1,656	3,278,177
Norway	139,104	206,391	279,267	461,300	1,178,160
Portugal	3,475	2,926	-	49,151	-
Sweden	-	759	-	759	18,667
Switzerland	-	-	809,492	-	4,154,839
<u>Middle East</u>					
Ethiopia	-	253	-	253	-
Iran	172	193	-	485	-
Israel	-	-	-	68,561	-
Jordan	333	304	-	637	-
Lebanon	298,213	618,820	-	1,285,390	-
Saudi Arabia	-	5,003	-	5,785	-
U.A.R. - Egypt	-	-	-	2,376	-
U.A.R. - Syria	-	1,118	-	4,467	-

Exports of Canadian Wheat and Wheat Flour by Destination 1960-61

Destination	August	November		August-November	
	Wheat Flour 1/	Wheat Flour 2/	Wheat 3/	Wheat Flour 2/	Wheat 3/
- bushels -					
OTHER COUNTRIES (concluded)					
<u>Other Africa</u>					
Angola	575	3,105	-	6,670	-
Liberia	3,917	575	-	6,044	-
Mozambique	989	-	31,733	989	169,866
Portuguese Africa, nes	14,490	5,356	-	33,874	-
Republic of the Congo	6,785	8,096	-	70,523	-
<u>Other Asia</u>					
Burma	-	-	52,750	-	52,750
Cambodia - Laos	-	56,157	-	56,157	-
Indonesia	-	205,795	-	205,795	-
Japan	32,202	145,997	1,614,441	370,341	16,032,193
Philippines	343,040	266,282	-	876,194	124,141
Portuguese India	7,970	13,619	-	55,964	-
Portuguese Asia, nes	5,060	2,530	-	17,204	-
Thailand	38,985	23,816	-	104,788	-
<u>Oceania</u>					
French Netherlands Oceania	598	-	-	598	-
United States Oceania	3,450	8,625	-	15,525	93,894
<u>South America</u>					
Bolivia	862	-	-	862	-
Chile	-	5,750	-	5,750	-
Colombia	23,750	230	-	82,556	-
Ecuador	-	-	15,867	-	321,941
Peru	-	-	377,067	690	377,067
Surinam	7,602	4,659	-	22,059	-
Venezuela	2,818	471	18,372	5,934	751,213
<u>Central America and Antilles</u>					
Costa Rica	48,997	66,364	-	232,852	-
Cuba	81,701	119,600	2,528	335,464	5,056
Dominican Republic	2,645	-	-	21,275	387,333
El Salvador	15,035	34,213	-	84,617	-
French West Indies	230	230	-	1,702	-
Guatemala	4,257	3,660	-	8,607	-
Honduras	7,245	6,297	-	24,157	1,665
Netherlands Antilles	4,313	8,395	-	31,078	-
Nicaragua	21,687	48,852	-	127,719	-
Panama	22,207	30,820	-	118,459	-
<u>North America</u>					
St. Pierre-Miquelon	-	-	-	639	-
<u>United States</u>					
Flour in terms of wheat	85,436	101,660	-	387,010	-
For domestic use 4/	-	-	310,596	-	935,324
Totals, Other Countries	1,250,257	2,024,709	14,132,453	5,258,454	59,717,261
Sub-Totals, All Countries	2,866,554	4,440,781	23,223,748	12,416,555	95,045,138
Bagged Seed wheat 5/	-	-	496,631	-	1,044,412
Totals, All Countries	2,866,554	4,440,781	23,720,379	12,416,555	96,089,550

nes - not elsewhere specified.

1/ In terms of wheat equivalent. Adjusted to remove effect of time lag in the returns made by Customs. Conversion rate: 2.3 bushels per cwt.

2/ In terms of wheat equivalent. Unadjusted Canadian Customs returns. Conversion rate: 2.3 bushels per cwt.

3/ Overseas clearances as reported by the Statistics Branch, Board of Grain Commissioners for Canada, for all countries except the United States. Subject to revision.

4/ Compiled from returns of Canadian elevator licensees and shippers and advice from American Grain correspondents. Excluding bagged seed.

5/ Unadjusted Canadian Customs returns.

Canadian Wheat Board Weekly Average Cash Wheat Prices
Basis in Store Fort William-Port Arthur

Class and Grade	Week Ending			
	December 9	December 16	December 23	December 30
- cents and eighths per bushel -				
<u>Initial Payment to Producers</u>				
1 Northern	140	140	140	140
2 Northern	136	136	136	136
3 Northern	132	132	132	132
4 Northern	125	125	125	125
5 Wheat	108	108	108	108
6 Wheat	102	102	102	102
Feed Wheat	96	96	96	96
1 C.W. Garnet	122	122	122	122
2 C.W. Garnet	117	117	117	117
1 Alberta Red Winter	124	124	124	124
2 Alberta Winter	119	119	119	119
1 C.W. Amber Durum	140	140	140	140
2 C.W. Amber Durum	136	136	136	136
3 C.W. Amber Durum	132	132	132	132
<u>Internation Wheat Agreement</u> <u>and Domestic Sales</u>				
1 Northern	164/4	164/5	165/7	168/1
2 Northern	159/4	159/5	160/7	163/1
3 Northern	157/4	157/5	158/7	161/1
4 Northern	155/4	155/5	156/7	159/1
5 Wheat	149	149/1	150/3	152/5
6 Wheat	146/6	148/1	149/3	151/5
Feed Wheat	144	144/1	145/3	147/5
1 C.W. Garnet	159/4	159/5	160/7	163/1
2 C.W. Garnet	155/4	155/5	156/7	159/1
3 C.W. Garnet	152/4	152/5	153/7	156/1
1 Alberta Red Winter	160/4	160/5	161/7	164/1
2 Alberta Winter	157/4	157/5	158/7	161/1
3 Alberta Winter	153/4	153/5	154/7	157/1
1 C.W. Amber Durum	179	179/1	180/3	182/5
2 C.W. Amber Durum	176	176/1	177/3	179/5
3 C.W. Amber Durum	173	173/1	174/3	176/5
<u>Export - Class II</u>				
1 Northern	164/4	164/5	165/7	168/1
2 Northern	159/4	159/5	160/7	163/1
3 Northern	157/4	157/5	158/7	161/1
4 Northern	155/4	155/5	156/7	159/1
5 Wheat	149	149/1	150/3	152/5
6 Wheat	146/6	148/1	149/3	151/5
Feed Wheat	144	144/1	145/3	147/5
1 C.W. Garnet	159/4	159/5	160/7	163/1
2 C.W. Garnet	155/4	155/5	156/7	159/1
3 C.W. Garnet	152/4	152/5	154/4	157/1
1 C.W. Amber Durum	179	179/1	180/3	182/5
2 C.W. Amber Durum	176	176/1	177/3	179/5
3 C.W. Amber Durum	173	173/1	174/3	176/5

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

Class and Grade	Week Ending			
	December 9	December 16	December 23	December 30

- cents and eighths per bushel -

Initial Payment to Producers

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

International Wheat Agreement
and Domestic Sales

1 Northern	175	175/1	176/3	178/5
2 Northern	170	170/1	171/3	173/5
3 Northern	168	168/1	169/3	171/5
4 Northern	166	166/1	167/3	169/5
5 Wheat	154	154/1	155/3	157/5
6 Wheat	148	148/1	149/3	151/5
Feed Wheat	146	146/1	147/3	149/5
1 C.W. Garnet	160	160/1	161/3	163/5
2 C.W. Garnet	156	156/1	157/3	159/5
3 C.W. Garnet	153	153/1	154/3	156/5
1 Alberta Red Winter	164	164/1	165/3	167/5
2 Alberta Winter	161	161/1	162/3	164/5
3 Alberta Winter	157	157/1	158/3	160/5

Export - Class II

1 Northern	175	175/1	176/3	178/5
2 Northern	170	170/1	171/3	173/5
3 Northern	168	168/1	169/3	171/5
4 Northern	166	166/1	167/3	169/5
5 Wheat	154	154/1	155/3	157/5
6 Wheat	148	148/1	149/3	151/5
Feed Wheat	146	146/1	147/3	149/5
1 C.W. Garnet	160	160/1	161/3	163/5
2 C.W. Garnet	156	156/1	157/3	159/5
3 C.W. Garnet	153	153/1	154/3	156/5
1 Alberta Red Winter	164	164/1	165/3	167/5
2 Alberta Winter	161	161/1	162/3	164/5
3 Alberta Winter	157	157/1	158/3	160/5

CANADIAN FLOUR MILLING SITUATION

Production Wheat flour production by Canadian mills during November 1960 amounted to 3,835,000 hundredweight, representing an increase of 2 per cent over both the October 1960 total of 3,754,000 hundredweight and the November 1959 figure of 3,756,000 hundredweight and 1 per cent greater than the ten-year (1950-59) average production for the month of November of 3,815,000 hundredweight. Mills reporting operations during November 1960 had a total rated capacity of 151,000 hundredweight per 24-hour day and on the basis of a 25-day working period 101.5 per cent of this rated capacity was effective. This increase in percentage of capacity reflects the fact that some mills worked more than the 25-days included in this formula as well as a reduction in total daily capacity from the November level of 171,000 hundredweight.

Wheat milled for flour during November 1960 amounted to 8,634,000 bushels, 2 per cent greater than the 8,480,000 bushels milled during the previous month and 1 per cent over the 8,530,000 bushels milled in November a year ago. Of the wheat milled for flour during November 1960, some 7,710,000 bushels were Western Canadian spring wheat (other than Durum) while the remainder consisted of Ontario winter wheat (586,000 bushels); Durum (278,000 bushels); and all other (59,000 bushels).

Exports According to preliminary Customs returns, exports of Canadian wheat flour during November 1960 amounted to 1,931,000 hundredweight (some 4,441,000 bushels of wheat equivalent), representing an increase of 81 per cent over the 2,448,000 bushels exported during the preceding month and 44 per cent greater than the adjusted November 1959 total of 3,093,000 bushels. Flour shipments during the month went to fifty-six countries with exports to the United Kingdom amounting to 1,540,000 bushels of wheat equivalent and accounting for 35 per cent of the November total. Other principal markets for Canadian wheat flour during the month with shipments in thousands of bushels of wheat equivalent were as follows: Lebanon, 619; Philippines, 266; Norway, 206; Indonesia, 206; Trinidad, 179; Ghana, 157; Japan, 146; Jamaica, 134; Cuba, 120; and United States, 102.

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

Crop Year	Wheat Milled for Flour - bushels -	Wheat Flour	
		Production	Exports ^{1/}
			- cwt. -
1935-36—1939-40 average	67,845,114	29,405,451	9,603,941
1940-41—1944-45 average	99,704,638	43,908,245	23,699,546
1945-46—1949-50 average	107,330,372	47,011,540	25,819,721
1950-51—1954-55 average	100,446,328	43,847,894	21,812,041
1955-56	91,770,025	40,148,750	17,391,300
1956-57	85,149,373	37,623,446	14,582,431
1957-58	92,288,897	40,819,678	17,556,886
1958-59	90,142,957	39,826,493	16,141,267
1959-60	91,389,801	40,344,578	16,073,893
1960-61 ^{2/}			
August	7,794,120	3,417,531	1,215,428
September	8,268,037	3,654,262	1,188,035
October	8,479,583	3,754,453	1,064,265
November	8,633,739	3,835,054	1,930,774
Totals	33,175,479	14,661,300	5,398,502
Same months 1959-60 (revised) ..	32,211,446	14,193,505	5,548,538

^{1/} Based on Customs returns. Exports for the crop years 1945-46—1959-60 revised to remove effect of time lag in the returns made by Customs.

^{2/} Subject to revision.

UNITED STATES SITUATION

Supply Position Total domestic supplies of wheat in the United States for the 1960-61 crop year are estimated at 2,678.3 million bushels, consisting of the July 1 carryover of 1,314.9 million and the 1960 crop, now placed at 1,363.4 million bushels. Domestic supplies of the size indicated represent an increase of about 11 per cent over the previous peak of 2,421.8 million bushels a year ago. Imports of wheat from Canada during the July-November period of the current United States crop year amounted to 2.2 million bushels, compared with 1.7 million during the same months of the preceding crop year. After deducting an estimated 609 million bushels for anticipated domestic requirements, some 2,071.6 million remain available for export and for carryover during 1960-61 compared with 1,816.4 million in 1959-60.

United States Wheat Supplies

Item	1959-60	1960-61 <u>1/</u>
- million bushels -		
Carryover at beginning of crop year (July 1)	1,295.1	1,314.9
New crop	1,126.7 <u>2/</u>	1,363.4 <u>2/</u>
Total estimated domestic supplies	2,421.8	2,678.3
Imports of wheat and wheat flour in terms of wheat for domestic use, July-November	1.7	2.2
Total estimated supplies <u>3/</u>	2,423.5	2,680.6
Less estimated domestic requirements for crop year <u>4/</u>	607.1	609.0
Available for export and for carryover	1,816.4	2,071.6
Deduct:		
Exports of wheat as grain, July-November	135.7	221.0
Exports of wheat flour and products in terms of wheat, July-November <u>5/</u>	31.9	32.9
Total exports of wheat, wheat flour and products <u>6/</u>	167.6	253.9
Balance on December 1 for export and for carryover ..	1,648.8	1,817.7

1/ Preliminary. 2/ Revised. 3/ Excluding imports for December-June. 4/ Includes allowances for shipments of United States wheat and wheat products to Alaska, Hawaii, Puerto Rico, Guam, Samoa, Virgin Islands and Wake Island. These shipments are not included in exports as set out in the table. 5/ Flour exports exclude "Milled in bond". 6/ These figures now include all shipments under relief programs which formerly were not available from Census data.

Exports of wheat, wheat flour and other products in terms of grain equivalent during the first five months (July-November) of the 1960-61 United States crop year amounted to 253.9 million bushels, 51 per cent greater than the 167.6 million exported during the same months in 1959. The balance remaining on December 1, 1960 for export and for carryover was estimated at 1,817.7 million bushels compared with 1,648.8 million on the same date a year ago.

1960 Wheat Crop
Estimated at 1,363
Million Bushels

In a report released on December 16, 1960 the Crop Reporting Board of the United States Department of Agriculture stated in part that production of all wheat in 1960, at 1,363 million bushels, was the second highest crop of record, more than a fifth larger than 1959 and nearly a fourth above average.

Land seeded to wheat in the fall of 1959 and spring of 1960 totaled 55.6 million acres, 4 per cent smaller than the acreage seeded for the 1959 crop and 18 per cent less than average. Abandonment and diversion in 1960 amounted to 5.4 per cent or 3 million acres compared with 8.8 per cent or 5 million acres in 1959. Total acreage of wheat harvested for grain in 1960 was 52.6 million acres, practically the same as 1959 but a tenth less than average.

Yield per harvested acre, at 25.9 bushels, was the second highest of record and well above the 1959 yield of 21.4 and the average of 19.0 bushels.

The 1960 winter wheat crop of 1,117 million bushels was the second largest of record, a fifth larger than the 1959 crop, and a third larger than average. The yield per harvested acre of 27.5 bushels ranks as the second highest of record and exceeds the average yield by more than 7 bushels.

An estimated 43.2 million acres were seeded for 1960 harvest—slightly smaller than the previous year and 14 per cent below average. For the United States, 6.1 per cent of the seeded acreage was not harvested for grain, compared with 9.3 per cent in 1959 and the average of 16.7 per cent. The harvested acreage of 40.6 million acres was 1 per cent larger than the previous year but 3 per cent less than average.

The 246 million bushels of all spring wheat produced in 1960 was more than a fifth above 1959 but 5 per cent below average. This increase over last year was due to higher yields as growers harvested 3 per cent fewer acres. The acreage seeded to spring wheat totaled 12.4 million acres, nearly a million acres less than the previous year and 5.4 million acres smaller than average. Abandonment this year, at 2.7 per cent, was significantly below the 6.9 per cent abandoned in 1959 and left 12.1 million acres for harvest as grain. Yield per harvested acre at 20.4 bushels is the second highest of record and well above the 16.4 bushel average of 1959.

Production of spring wheat other than durum of 212 million bushels was 16 per cent above the 1959 crop but 8 per cent below average. Sharp increases in the Dakotas more than offset significant decreases in Montana, Idaho, and Washington. Total outturns were higher in all North Central States except Wisconsin, but were generally lower elsewhere. Total harvested acreage dropped from a year earlier but the average yield per acre was substantially higher.

Growers seeded 10.7 million acres or 11 per cent less than the previous year. Plantings were unchanged or lower in all States except Iowa. Largest reductions were in the Dakotas and Montana which reflected a shift to durum and winter wheat. Harvested acreage decreased 7 per cent to 10.4 million acres as the decline was limited by the light abandonment of 2.9 per cent compared to 7.1 per cent in 1959. Yield per acre, at 20.4 bushels, was up 4.1 bushels from a year earlier. It was the same as in 1957 but considerably below the 1958 record high of 23.4 bushels.

Spring moisture supplies were plentiful and the crop started well. Prospects remained favourable until high temperatures and low precipitation in July forced early maturity.

Durum wheat production of 34.0 million bushels in 1960 was more than two-thirds above the 1959 crop and the largest since 1957. Significant gains were shown in all four major producing States.

Increased output over last year resulted from a sharp expansion in planted acreage and higher yields in the Dakotas, Montana, and Minnesota. North Dakota had the largest increase in acreage while South Dakota showed the most improvement in yield. The U. S. average yield per acre of 20.6 bushels was up 3.2 bushels from 1959 and second to the 1958 record high of 23.8 bushels

Planted acreage of 1,683,000 acres was nearly two-fifths above 1959 and the largest since 1957. Abandonment, at 1.8 per cent, was unusually low and left 1,652,000 acres for harvest.

Acreage and Production of Winter Wheat 1961 The following account of the acreage seeded to winter wheat in the fall of 1960 and a preliminary forecast of production in 1961 is taken from a report on "Winter Wheat and Rye", released by the Crop Reporting Board on December 20, 1960.

Winter wheat seedings in the fall of 1960 totaled 43.9 million acres, slightly larger than seedings in the fall of 1959 but nearly a tenth less than average. The 1960 fall seedings were planted under acreage allotment and marketing quotas with the all wheat national allotment at 55 million acres, the same as last year.

A 1961 winter wheat crop of 1,034 million bushels is indicated, based on conditions as of December 1 and other factors. A crop of this size would be 7 per cent smaller than the 1960 crop but nearly a fourth larger than average and the fifth largest production of record.

Weather between December 1 and harvest time as well as damage from insects and disease largely influence the final outturn of the crop. The current forecast of production assumes that these factors will approximate the normal for the remainder of the 1961 crop season. In the last 10 years, the average change in the United States production estimate from December 1 to harvest has been 134 million bushels, ranging from a maximum change of 274 million bushels to a minimum of 5 million bushels.

Seeding of the 1961 winter wheat crop was underway at a relatively early date and spread to completion rapidly under favourable fall weather. Moisture supplies were favourable over most of the Central and Southern Plains to stimulate even germination and abundant fall growth causing some concern that excessive jointing might occur prior to dormancy. Most northern and western sections encountered soils too dry for optimum early development. October rains improved stands in Colorado and the Ohio River Valley where early germination was spotty. Moisture needs at seeding time in the northern Rocky Mountain and the Pacific Northwest areas continued well into the fall providing only limited plant growth prior to entering the dormant period.

Kansas growers seeded the same acreage as the previous year with current crop prospects indicating a production below last year's near record outturn but well above average. Favourable weather conditions permitted early seeding except in some dry western counties where planting was delayed until after late September rains. Seeding began in early September and was nearly completed by mid-October — one of the earliest seedings of recent years. In central and eastern sections of Kansas, farmers seeded well ahead of recommended planting dates and as a result may have placed their crop in more than the usual danger from Hessian fly and

wheat streak mosaic. Wheat germinated well and with a mild fall made excellent growth with sufficient root development and tillering to protect against soil blowing. The proportion of wheat seeded on summer fallowed land was about the same as last year.

Seeding time in Nebraska found adequate moisture in eastern areas but dry conditions in western sections. In the eastern part of the State, wheat came up to good stands and made excellent early fall growth but lack of moisture during October and November resulted in plants drawing heavily on short soil moisture reserves. Rust is prevalent over much of southeast Nebraska and some localities report a heavy infestation of Hessian fly. In western sections of the State, germination was irregular but showers brought wheat up to fair stands. Because of dry soils in this area, plants did not develop good root systems and are subject to possible wind erosion.

Oklahoma had adequate moisture at seeding time and wheat got off to a good early season start. Late October rains and mild temperatures resulted in lush growth and wheat is providing abundant grazing. Leaf rust infestation is fairly widespread over the State but has caused only minor damage.

Texas High Plains received above normal rainfall during July and August providing plentiful moisture for early wheat seeding. Early fall precipitation was heavy and wheat responded rapidly to almost ideal conditions. By late November, many High Plains fields were boot top high and livestock could not keep growth eaten down. Wheat in the Low Plains and Cross Timbers also made good growth but not as luxurious as the High Plains crop.

Moisture in Colorado at seeding time was generally deficient but growers were able to obtain fair stands by using deep furrow drills. Wheat made little growth until late October when rain and snow gave the crop a much needed boost. Growth and root development is still limited in some areas but generally the crop is entering the winter in good condition.

The North Central States other than Kansas and Nebraska experienced rather unfavourable fall planting conditions as surface moisture was generally limited. Many fields were "dusted-in" but the open fall permitted growers to complete seeding the full intended acreage at an early date. Most of the area received welcome moisture during November that brought fields up to good stands and permitted favourable growth during the unseasonably warm periods during the month. Most fields were in good shape for entering the winter with much of the acreage secure under snow cover when the first severe winter temperatures arrived.

In the Mountain States, dry soils during the late summer and early fall slowed seedings with much of the acreage "dusted-in". Seedings were generally completed during October and were benefited by mid-October rains. Montana continued dry during the fall months resulting in slow germination and spotty stands. Root systems are not as well developed as normal and stooling is limited.

Pacific Northwest States seeded the crop a little later than usual due to less satisfactory soil moisture than normal. Fall seedings germinated slowly and made only limited growth until aided by November precipitation.

Favourable planting conditions along the Atlantic Coast and South Central areas encouraged growers to increase seeded acreages. The mild temperatures during much of November promoted excellent early season growth and plants should have a good root system.

The indicated yield of 23.6 bushels per seeded acre for the United States is below the 1960 yield of 25.9 bushels but well above the average of 17.6 bushels. Current conditions indicate that 6.6 per cent of the national acreage seeded for all purposes will not be harvested for grain compared with 6.1 per cent for the 1960 crop and the average of 16.5 per cent.

Durum Wheat Made
Eligible Under
Payment-in-Kind
Export Program

The United States Department of Agriculture announced on December 27 that durum has been added to the classes of wheat eligible for export payments under the payment-in-kind export program for wheat. Beginning today, a separate rate for durum wheat will be included in the daily announcement of export payment rates offered by the Commodity Credit Corporation on commercial exports of wheat.

The action is being taken as another step in United States Department of Agriculture's continuing efforts to increase dollar exports of agricultural commodities. Department officials said that since the primary outlets for durum wheat are in strong dollar markets it is expected that the action will help to improve the balance-of-payments situation.

Production of durum wheat this year is estimated at approximately 34 million bushels, as compared with 20 million bushels in 1959 and a 10-year (1949-58) average of 27 million bushels. July 1 carryover-stocks totaled 13 million bushels, giving a total supply for the current marketing year of approximately 47 million bushels.

Durum wheat was last exported in substantial quantities in the 1956-57 marketing year, when approximately 11 million bushels were sold for export.

Flour
Production

The Bureau of the Census, Department of Commerce estimated wheat flour production in the United States in November 1960 at 22,181,000 sacks, an average of 1,056,000 sacks per working day. This compared with an average output per working day of 1,110,000 sacks in October 1960 and 1,084,000 sacks in November 1959. Production of wheat flour in November was at 94.3 per cent of capacity compared with 99.1 per cent and 97.5 per cent, respectively, for the previous month and the same month a year ago. Flour mills in November ground 50,503,000 bushels of wheat compared with 53,166,000 bushels in the previous month. Wheat offal output in November amounted to 413,681 tons.

Cont'd from page 9

Wheat Board
Resignation

Resignation of John T. Dallas from the Canadian Wheat Board, effective January 1, 1961, was announced on December 16, 1960 by the Hon. Alvin Hamilton, Minister of Agriculture.

Mr. Dallas has been a Commissioner of the Board since September 1, 1958. Prior to his appointment to the Board he had been Executive Vice-President of the Continental Grain Company (Canada) Limited, Winnipeg.

Mr. Hamilton stated that Mr. Dallas had asked to be relieved of his post to return to private business and that his resignation had been accepted with considerable regret. During his term of office he had made a major contribution to the Canadian Wheat Board from his wealth of sales experience, his broad knowledge of the grain export trade and domestic lake shipping.

United States Exports of Wheat and Flour by Country of Destination
July-October 1959 and 1960

These data on exports by destination cover only the first four months of the United States crop year beginning July 1. The table on United States wheat supplies (see page 21) contains a preliminary estimate of total exports for the first five months of the United States crop year. Neither of these tables should be confused with the United States export figure shown on page one of this publication which, for comparative purposes, is based on the Canadian crop year beginning August 1.

Destination	July-October 1959			July-October 1960		
	Wheat	Flour ^{1/}	Total	Wheat	Flour ^{1/}	Total
- thousand bushels -						
<u>Western Hemisphere</u>						
Canada	963	44	1,007	5,379	21	5,400
British West Indies	24	603	632	449	734	1,183
Central America	684	1,190	1,874	929	1,025	1,955
Cuba	2,385	590	2,975	545	788	1,333
Brazil	13,928	-	13,928	9,435	30	9,465
Peru	1,849	66	1,915	1,081	103	1,184
Venezuela	3,446	153	3,599	3,532	63	3,595
Others	1,081	1,797	2,878	962	2,260	3,222
Totals	24,360	4,448	28,808	22,312	5,025	27,337
<u>Europe</u>						
Belgium-Luxembourg	627	6	633	1,273	1	1,274
Germany	5,956	187	6,143	1,612	170	1,782
Greece	-	1,106	1,106	411	828	1,239
Italy	546	3,535	4,081	7,196	2,086	9,282
Netherlands	1,555	1,014	2,569	2,218	1,045	3,263
Poland	8,903	220	9,123	17,971	186	18,157
Portugal	89	293	382	1,167	332	1,499
United Kingdom	5,628	325	5,953	7,190	357	7,547
Yugoslavia	6,762	941	7,703	-	961	961
Others	2,381	361	2,742	1,884	618	2,502
Totals	32,447	7,988	40,435	40,922	5,584	47,506
<u>Asia</u>						
Ceylon	-	2,244	2,244	-	385	385
India	26,076	12	26,088	53,127	84	53,211
Israel	2,598	71	2,669	3,022	35	3,057
Japan	8,908	827	9,735	14,656	963	15,619
Jordan	1,470	332	1,802	1,212	382	1,594
Korea	3,199	535	3,734	3,870	476	4,346
Lebanon	407	1,283	1,690	184	31	215
Pakistan	2,789	126	2,915	11,337	364	11,701
Philippines	185	1,684	1,869	1,270	531	1,801
Syria	98	2	100	2,380	580	2,960
Taiwan (Formosa)	3,929	151	4,080	3,207	230	3,437
Turkey	-	^{2/}	^{2/}	1,045	41	1,086
Others	530	2,098	2,628	1,253	3,606	4,869
Totals	50,189	9,365	59,554	96,573	7,708	104,281
<u>Africa</u>						
Canary Islands	1,212	2	1,214	942	5	947
Egypt	3,179	1,411	4,590	3,390	6,407	9,797
Union of South Africa	1,082	-	1,082	-	1	1
Others	1,902	1,756	3,658	1,896	1,882	3,778
Totals	7,375	3,169	10,544	6,228	8,295	14,523
Oceania	-	11	11	-	17	17
Unspecified	-	80	80	-	-	-
Totals, All Countries ^{3/}	114,371	25,061	139,432	166,035	27,629	193,664

^{1/} Wholly of U.S. wheat (grain equivalent). ^{2/} Less than 500 bushels. ^{3/} Includes shipments for relief or charity.

Cash Wheat Prices on the Kansas City and Minneapolis Markets

No. 2 Hard Winter, Kansas City			No. 1 Northern Spring, Minneapolis		
Date	Price		Date	Price	
	- cents per bushel -			- cents per bushel -	
December 1, 1960	200 1/2	- 225 1/2	December 1, 1960	211	
2	202	- 202 1/2	2	209 1/2	
5	201 1/2	- 209	5	209 3/8	
6	200 1/4	- 225 1/4	6	208 5/8	
7	199 1/2	- 224 1/2	7	210 1/8	
8	200 3/4	- 204	8	210 5/8	
9	210 5/8		9	210 5/8	
12	212		12	210 3/8	
13	201		13	210 7/8	
14	200 1/2	- 224 3/4	14	212 1/4	
15	200 1/2	- 224 1/2 <u>1/</u>	15	211 3/4	
16	201 1/2		16	209 3/4	
19	200 3/4	- 204 1/4	19	209 1/2	
20	200 3/4	- 203 1/4	20	209 3/8	
21	202		21	210	
22	201 1/4	- 224 1/4 <u>1/</u>	22	209 3/4	
23	202 1/2	- 203	23	210	
26	HOLIDAY		26	HOLIDAY	
27	202 3/4	- 203 1/4	27	208 3/4	
28	201 1/2		28	208 3/4	
29	202 1/2		29	209 5/8	
30	203		30	210 5/8	

1/ Nominal.

Chicago Wheat Futures, High Points of Closing

Date	December	March	May	July	September
	- cents and eighths per bushel -				
December 1, 1960	203	205	201/6	185/4	186
2	202/4	204/6	201/4	185/4	188
5	203/4	205/2	202/1	185/4	188/1
6	203/4	205	201/6	185	187/4
7	204/3	205/5	202/3	185/4	188
8	206	206/1	202/7	186	188/5
9	207/1	206/7	203/4	186/2	188/6
12	207	207	203/5	186/5	189/2
13	205/4	205/3	202/4	185/5	188
14	206/6	206	203	186/1	188/4
15	206/2	205/7	202/5	185/6	188/1
16	205/7	206	202/5	185/6	188/2
19	204/7	205/2	202/2	185/1	187/2
20	208	206/3	202/7	185/5	188/1
21		207/6	204/2	186/6	189
22		207/7	204/2	186/1	188/4
23		208/1	204/7	186/1	188/4
26			H O L I D A Y		
27		207/1	203/4	185/6	188/2
28		208	204/1	186/1	188/4
29		208/3	204/5	186	188/4
30		208/6	204/7	186/2	188/6

AUSTRALIAN SITUATION

Supply Position Disposition of Australian wheat supplies during the crop years (December-November) 1958-59 and 1959-60 is set out in the accompanying table. Total estimated supplies in the crop year recently completed at 263.2 million bushels, represented an increase of 14 per cent over the 1958-59 total of 231.7 million and reflected a substantial increase in carryover stocks which more than offset a decline in production. Apparent domestic disappearance during 1959-60, amounted to 78.8 million bushels compared with 70.4 million in the 1958-59 crop year. The quantity available for export and for carryover during the 1959-60 Australian crop year, at 184.4 million bushels, exceeded by 14 per cent the 1958-59 total of 161.3 million. Exports of wheat and wheat flour in terms of grain equivalent during the 1959-60 crop year amounted to 123.8 million bushels and were 29 per cent above the 1958-59 level of 96.1 million. The preliminary estimate places carryover stocks at December 1, 1960 at 60.6 million bushels compared with the December 1, 1959 total of 65.2 million.

Australian Wheat Supplies

Item	1958-59	1959-60 <u>1/</u>
	- million bushels -	
Carryover, including flour as wheat, at beginning of crop year (December 1)	16.6 <u>2/</u>	65.2
New Crop	215.1	198.0 <u>2/</u>
Total estimated domestic supplies	231.7	263.2
Less estimated domestic requirements for crop year .	70.4 <u>2/</u>	78.8 <u>2/</u>
Available for export and for carryover	161.3	184.4
Deduct:		
Exports of wheat as grain, December 1-November 30	70.9	97.6
Exports of wheat flour in terms of wheat, December 1-November 30	25.2	26.2
Total exports of wheat and wheat flour	96.1	123.8
Balance on December 1 for export and for carryover .	65.2	60.6

1/ Preliminary.

2/ Revised.

The following information relative to the Australian situation has been extracted from a report from Mr. Ian R. Smyth, Assistant Commercial Secretary for Canada, Melbourne, under date of December 15, 1960 and is reproduced with the permission of the Trade Commissioner Service, Department of Trade and Commerce. Currency conversions have been made at the rate of £1 equals \$2.1983 (Canadian) the quotation in effect on December 19, 1960.

Crop Situation At the opening of the 1960-61 crop year, December 1, it appears that Australia is headed toward a record wheat harvest. It is unlikely to be less than 235 million bushels and is officially forecast at 246 million, well above the 1947-48 record of 220 million bushels and about 47 million greater than last year's harvest. Every State except Queensland has had a favourable season. In Queensland, however, where the season was dry and poor, there was excessive rain at harvest time and some wheat had to be bagged for storing and drying

prior to delivery to rail sidings. In Western Australia, the wheat crop is officially forecast at 63 million bushels, its greatest ever. Victoria's crop will probably equal or exceed its 1953-54 harvest of 53 1/2 million bushels. Only once, in 1949-50 has that been bettered, when the crop was 57 1/2 million bushels. At 78 millions, the New South Wales crop will have been exceeded only once, and South Australia's forecast of 39 million bushels is the highest since pre-war days. The expected average yield per acre of 19.3 bushels is also a near record and has been exceeded only once - in 1958-59.

A comparison with last year's figures can be seen in the following table, compiled from both official and unofficial sources:

	<u>Actual</u>		<u>Anticipated</u>	
	Production 1959-60 million bushels	Production 1960-61 million bushels	Acreage million acres	Yield per Acre bushels
West Australia	59	63	3.9	16.3
South Australia	13	39	1.7	22.9
Victoria	39	56	2.652	21.1
Queensland	13	10	0.8	12.5
New South Wales	74	78	3.7	21.1
Totals	198	246*	12.752	19.3

* This represents total crop. After deducting amounts retained on farm for feed and seed, deliveries to the Wheat Board are officially estimated at 229 million bushels.

1960-61
Price Guarantees A guaranteed price of 15/2d (\$1.67) per bushel, bulk basis, f.o.r. ports, for the 1960-61 crop was announced on November 30 by the Minister for Primary Industry. This represents a rise of 4d (4 cents) per bushel over the 1959-60 price and is the result of an assessment of cost movements in the various items entering into wheat production in the preceding twelve months. The price guaranteed will cover up to 100 million bushels of exports from the 1960-61 wheat crop. The wholesale price of wheat for home consumption has also risen 4d (4 cents) to 15/4d (\$1.69) per bushel, bulk basis, f.o.r. ports. This price includes 2d (2 cents) a bushel to meet the cost of shipment of wheat to Tasmania from the mainland, as provided under the Wheat Industry Stabilization Act.

Advances on wheat delivered to the Australian Wheat Board will be paid in two instalments, 9/ (99 cents) per bushel, less freight for bulk wheat f.o.r. ports, with a further payment of 2/ (22 cents) per bushel to be paid April 1, 1961. For bagged wheat, the first advance will be 4d (4 cents) per bushel above the bulk rate and an additional advance of 2d (2 cents) per bushel will be paid on Western Australian deliveries in recognition of the freight advantage accruing to that State on export markets.

The decision to split the advance into two instalments (last year's 11/ (\$1.21) advance was paid in full on delivery) is regarded as part of the Government's recent counter-inflationary programme. It has been bitterly criticized by several prominent growers including two members of the Australian Wheat Board. Farm spending, it is claimed, is not inflationary and many farmers, especially those with hire purchase commitments, will be seriously embarrassed by the lower payment. The increase of 4d (4 cents) per bushel on the home consumption price has also been attacked, since it was understood that the Wheat Index Committee had recommended an

increase of 5d (5 cents) per bushel to meet the rise in cost of production.

Increased wheat production will result in a Government outlay of about £125 million over the next four months, as opposed to £99 million last year. Additional handling and administrative costs will bring the advance expenditure to a total of £138 million for the period, compared with £109 million for the same period in 1959-60.

Marketing Position Despite 1959-60 exports of wheat and wheat as flour totalling 124 million bushels (the 1957-58 and 1958-59 totals were 54 million and 96.1 million bushels, respectively) the carryover to 1960-61 is approximately 60.6 million bushels. Added to this year's anticipated crop, the estimated 1960-61 total for export, domestic consumption and carryover is about 290 million bushels. In view of conditions in Europe, however, it is expected that last year's brisk market will be maintained. The official circular of the Wheat Pool of Western Australia anticipates 1960-61 Australian export sales to go as high as 150 million bushels - a figure not attained since 1932-33 and well above the post war record of 134 millions in 1950-51.

Sales of wheat reported for the period November 17 - November 30, are as follows:

	long tons	bushels		long tons	bushels
Iraq	17,900	668,000	Germany	13,800	515,000
Hong Kong	300	11,000	Japan	730	27,000
United Kingdom	25,356	947,000	Rhodesia	9,000	336,000
Eire	10,500	392,000			

From the new crop year started December 1, to December 13, sales are reported as follows:

	long tons	bushels		long tons	bushels
Iran	1,000	37,000	Hong Kong	1,500	56,000
Japan	3,387	126,000	New Zealand	10,000	373,000
United Kingdom	25,000	933,000	Okinawa	1,500	56,000
Algeria	9,100	340,000			

Exports of Australian Wheat and Wheat Flour in Terms of Wheat December 1 - November 26, 1959-60 and Corresponding Period 1958-59

Destination	Wheat		Wheat Flour	
	1958-59	1959-60	1958-59	1959-60
	- thousand bushels -			
Aden	527	56	-	-
Aden and Aden I/T	-	-	1,280	1,122
Aden and Aden I/T (Atta Flour) ...	-	-	342	223
Africa, South	1,486	1,916	-	-
Albania	-	373	-	-
Austria	479	664	-	-
Belgian Congo	-	-	1	1/
British North Borneo	-	-	223	228
British West Indies	-	-	1	1/
Brunei	-	-	40	52
Burma	259	-	369	340

Exports of Australian Wheat and Wheat Flour in Terms of Wheat December 1 -
November 26, 1959-60 and Corresponding Period 1958-59

Destination	Wheat		Wheat Flour	
	1958-59	1959-60	1958-59	1959-60
- thousand bushels -				
Canary Islands	-	328	1	1
Ceylon	9	13	6,029	5,767
Cocos Islands	-	-	1	1
Cyprus	-	-	6	6
Dutch New Guinea	-	-	89	80
Eire	4,143	1,667	-	-
Formosa	-	37	-	-
Germany, West	3,590	2,861	-	-
Ghana	-	-	13	<u>1/</u>
Greece	-	-	-	3
Guam	-	-	-	5
Hong Kong	2,258	2,308	-	-
Hong Kong (General)	-	-	240	240
India	2,835	12,149	-	-
Indonesia	-	-	2,402	2,056
Iran	634	5,258	-	-
Iraq	6,348	8,128	-	-
Italy	-	2,170	-	8
Japan	13,258	12,539	-	-
Kenya	785	122	-	-
Korea, North	-	1,985	-	-
Laos	-	-	3	1
Lebanon	1,276	-	-	-
Macao	-	-	13	15
Malaya	639	534	3,008	3,632
Malaya (Atta Flour)	-	-	50	81
Maldivé Islands	-	-	67	65
Malta	383	887	-	-
Mauritius	1	-	771	1,125
Mozambique	-	-	<u>1/</u>	-
New Zealand	7,904	6,090	<u>1/</u>	<u>1/</u>
Nigeria	-	-	2	<u>1/</u>
Nyasaland	-	-	180	226
Okinawa	43	142	-	-
Pacific Islands	742	40	2,159	2,002
Pakistan	1,220	5,211	-	-
Persian Gulf	132	79	183	271
Persian Gulf (Atta Flour)	-	-	1,035	1,268
Philippines	30	503	172	125
Port Said (a/c S/S)	-	-	11	25
Portuguese East Africa	83	208	-	-
Portuguese India (Goa)	129	57	89	24
Rhodesia	2,749	2,818	-	-
Sarawak	-	-	220	271
Saudi Arabia	138	76	48	156
Seychelles Islands	-	-	39	39
Singapore	150	82	2,736	2,602
Singapore (a/c War Office)	-	-	50	70
Singapore (Atta Flour)	-	-	39	15
Somaliland, British	-	-	6	3

Exports of Australian Wheat and Wheat Flour in Terms of Wheat December 1 -
November 26, 1959-60 and Corresponding Period 1958-59

Destination	Wheat		Wheat Flour	
	1958-59	1959-60	1958-59	1959-60
	- thousand bushels -			
Thailand	5	3	679	634
Timor	-	-	23	20
Trans Jordan	-	366	-	-
Tunisia	-	334	-	-
United Kingdom	18,163	25,669	2,098	2,222
Zanzibar	13	13	188	247
Royal Navy	30	13	10	14
Ships' Stores	-	-	101	118
Totals	70,441	95,699	25,019	25,405

1/ Less than 500 bushels.

FRENCH SITUATION

The following account of the current crop situation in France has been extracted from a report by Miss V. F. Wightman, Agricultural Attaché, Canadian Embassy, Paris, under date of December 16, 1960, and is reproduced with the permission of the Trade Commissioner Service, Department of Trade and Commerce. Where possible, conversions from French to Canadian measures have been made and rounded for the convenience of our readers. Currency conversions have been made at the rate of one NF franc equals .20 Canadian dollars.

Weather and Crops Frequent rain has hampered field work all fall and by the end of November, considerable concern had developed over the delay in seeding of winter grains. Harvesting of rootcrops and corn continued well into November on land which would normally have gone into winter wheat. Furthermore, in many areas fall plowing has been all but impossible as machinery could not move on the saturated soil.

To the West and North of France seeding can continue up to January if conditions improve. However, at the time of writing (mid-December), rain had given way to snow and frost in many areas. Farmers on the rich plains around Paris may still be able to make up for the delay to a reasonable degree, but elsewhere, it is now too late for winter wheat. Furthermore, the seeding has taken place under adverse conditions which may lead to some losses.

At the beginning of December, the area sown to winter wheat was only half the normal level. Official statistics show the area to be 52 per cent below the last five year average, as will be seen in the accompanying table.

Wheat in France is mainly sown in the autumn in order to obtain the higher yields. In the spring, farmers are more likely to sow barley or corn which bring a better return per hectare. There is thus a risk in 1961 of an even larger surplus of corn and barley which are already difficult and costly to move this year. At the same time, the outlook is for a lower wheat crop in 1961 with little surplus for export. Wheat is considered easier to place: there is a contract with Germany, an export pattern has been established, and the export subsidy is financed in large measure by the growers.

	December 1 1955-59	December 1 1959	December 1 1960
	- thousand acres -		
Wheat	9,677	9,543	4,575
Wheat and rye	50	41	29
Rye	837	758	636
Barley	875	784	643
Oats	1,080	888	636
Mixed grains	75	89	53
Totals	12,593	12,104	6,573

Source: French Ministry of Agriculture.

Minister's Statement In the hope of avoiding an upset in the supply position next year, the Minister of Agriculture issued a statement to growers through their organizations and the press. He warned of the repercussions of an unwarranted extension of the area to barley and corn, and has promised that supplies of spring varieties of wheat will be made available. With regard to the price relationship, the Minister pointed out that if 1961 wheat deliveries are below the guaranteed quota of 6.8 million tons (249,854,000 bushels), farmers will enjoy the full price target of 40 NF per quintal (\$2.18 per bushel) which by law may be raised 10 per cent in case of a short crop. By contrast, the official prices of corn and barley may be lowered by 5 per cent in the event of heavy production and would be further reduced by a levy to offset export losses. The Minister therefore urges farmers to sow all they can to winter and spring wheat.

Supply Outlook Farm deliveries of wheat continue to lag considerably behind last year. This was at first attributed to the late harvest, but there is now speculation that total deliveries will be below the earlier estimate of 7.3 million tons (268,226,000 bushels). A figure of 7 million (257,203,000 bushels) is now considered more feasible.

Corn deliveries are also behind last year's level, despite the heavy crop, but this is due to the late harvest. Barley marketings, in contrast, are a third ahead of last year at the same period.

Farmers' Marketings

Grain	November 1 1959	November 1 1960
	- thousand bushels -	
Soft wheat	206,607	193,037
Durum wheat	1,856	2,197
Rye	1,857	1,640
Barley	66,269	89,815
Oats	7,926	7,493
Corn	4,667	2,775

By the second week of December, 460,000 tons (16,902,000 bushels) of French wheat had been sold for export to foreign countries. This is in addition to the 700,000 tons (25,720,000 bushels) committed to the franc zone as wheat or flour. Slightly over 200,000 tons (7,349,000 bushels) of both feed and milling wheat had been placed in Germany, 34,000 tons (1,249,000 bushels) in the United Kingdom and smaller quantities in Albania, Switzerland, Portugal, Denmark, etc. The export subsidy, as reported in the press, lately ranged 16.75 to 17.45 NF per quintal (91 to 95 cents per bushel). About the same subsidy is required for corn, and slightly less for barley. Growers contribute toward these export losses by a levy on marketings.

Export Surplus With the prospect of a lower wheat crop in 1961, a larger carry-
Now Uncertain over may be required next summer than the 650,000 tons (23,883,000
bushels) over the past two years. Given the delay in movement of
wheat off farms, the overall supply position is considerably different from a few
months ago and difficult to assess.

France is still offering wheat in small quantities and will no doubt try to remain on the market. During the 1958-59 crop year, when the export surplus was below average, the export pattern was maintained to a reduced extent, by dint of importing foreign wheat. Recently, to meet Algerian requirements, 50,000 tons (1,837,000 bushels) of United States and Australian wheat was purchased for direct shipment while at the same time, French wheat was exported to neighbouring countries.

Durum Recently, France purchases 31,000 tons of durum wheat (1,139,000
Wheat bushels) of which 27,000 (992,000 bushels) were from Canada and
4,000 (147,000 bushels) from Israel. This brings French purchases
outside the franc zone up to 95,000 tons (3,491,000 bushels) mainly from Canada.
In addition, 85,000 tons (3,123,000 bushels) have been contracted in Morocco and
130,000 tons (4,777,000 bushels) in Tunisia. The domestic crop is around 60,000
tons (2,205,000 bushels), and 75,000 tons (2,756,000 bushels) will be brought in
from Algerian mills as semolina. This ostensibly covers French requirements but
small quantities may be needed in the spring for mixing to assure uniform quality,
and Algeria may not have adequate supplies to carry over to the new crop year.

ARGENTINE SITUATION

Supply Position Disposition of Argentine wheat for the crop years (December-,
November) 1958-59 and 1959-60 appears in the following table.
Reflecting a relatively substantial decline in production, which more than offset a
small increase in carryover stocks, total estimated domestic supplies in the crop
year 1959-60, at 273.1 million bushels, were about 10 per cent less than the 1958-
59 total of 303.1 million. After deducting an estimated 150.6 million bushels for
apparent domestic disappearance, some 122.5 million were available for export and
carryover during 1959-60 compared with 156.1 million available in 1958-59.

Exports of wheat and wheat flour in terms of grain equivalent during the crop year recently completed amounted to 88.4 million bushels, representing a decrease of 9 per cent from the 97.2 million exported during 1958-59. The preliminary estimate places carryover stocks at December 1, 1960 at 34.0 million bushels, substantially below the 58.9 million at December 1, 1959.

Argentine Wheat Supplies

Item	1958-59	1959-60 ^{1/}
	- million bushels -	
Carryover at beginning of crop year (December 1) ^{2/}	56.1	58.6
New Crop ^{3/}	246.9	214.5
Total estimated domestic supplies	303.1	273.1
Less estimated domestic requirements for crop year	147.0	150.6
Available for export and for carryover	156.1	122.5
Deduct:		
Exports of wheat as grain, December-November	96.1	88.3
Exports of wheat flour in terms of wheat, December-November	1.1	0.1
Total exports of wheat and wheat flour	97.2	88.4
Balance on December 1 for export and for carryover	58.9	34.0

^{1/} Preliminary. ^{2/} Includes allowances for farm stocks. ^{3/} Official estimate.

The following account of the Argentine situation has been extracted from a report from Mr. C.S. Bissett, Commercial Counsellor, Buenos Aires, under date of December 30, 1960 and is reproduced with the permission of the Trade Commissioner Service, Department of Trade and Commerce. Where possible, conversions from Argentine to Canadian measures have been made for the convenience of our readers. Currency conversions have been made at the rate of 82.75 pesos per U.S. dollar less 20 per cent retention.

Wheat
1960-61

A pessimistic outlook prevails now as regards the new wheat crop. With the exception of the greater part of the southern growing areas the wheat harvest is entirely unsatisfactory, both as regards the tonnages involved as well as the quality of the grain. In the provinces of Santa Fé, Entre Rios and Córdoba the damage was caused mainly by excessive rainfall, although in Cordoba as well as other areas wheat suffered from drought, and also from invasions of green aphids. In the province of La Pampa, widespread drought will also result in a very poor crop. The only bright spot is, again, southwestern Buenos Aires, where an excellent harvest may be expected. This, however, will not serve fully to counteract the deficit of the other regions. The first official production estimate has just been released at 4,100,000 metric tons (150.6 million bushels). This is a very poor tonnage, as it is 29.8 per cent below the 1959-60 yield, and 33 per cent and 31.8 per cent below the averages for the last five and ten-year periods, respectively. This means that only about 600,000 or 700,000 tons (22,046,000 or 25,720,000 bushels) will be available for export during this new crop year, a damaging prospect for Argentina's economy. The evident switch-over from wheat to livestock raising, the result not only of unfavourable weather conditions, but also of several inter-acting economic factors, has not been entirely wise. Argentina finds itself now with plenty of beef supplies but ever-contracting export outlets, and very little wheat to export, when much more could be easily disposed of, according to opinions of the National Grain Board and of private experts.

The quality of the wheat is generally poor. In addition to the damaging effects of the excessive rainfall, resulting in much washed-out grain, considerable shrinkage of the kernels also occurred. This is the result of a hot

spell during October which forced the wheat excessively towards maturity. This was followed by a rather cold spell. There were also recurring fogs which provided ideal cold and damp conditions for the development of fungus diseases. Only a few lots of the newly harvested wheat reach an hectolitic weight of 80 kilos (64 pounds per bushel). The average is from 72 to 74 (58 to 59 pounds per bushel) in the province of Cordoba, and from 74 to 76 (59 to 61 pounds per bushel) in the province of Santa Fe.

The Argentine official wheat standards provide for three grades, within each type of grain, based on the percentage of foreign matter, damaged grains, etc. and on the following minimum hectolitic weights: Grade 1: 78 kilos (62 pounds per bushel); Grade 2: 75 (60 pounds per bushel); Grade 3: 72 (58 pounds per bushel). However it is also stipulated that whenever circumstances may require it, a fourth grade may be established. The National Grain Board has now decided to create this grade for this new crop, thus admitting its poor quality. This new grade has now been established with 67 kilos per hectolitre (54 pounds per bushel) as the weight basis, and also allowing for higher percentages of damaged and infested grains.

Prices have been firm recently for the new grain, although the quantities traded have not been large. Some recent prices in the Buenos Aires Futures Market have been as follows in pesos per 100 kilos (in brackets dollars per bushel), for delivery in January, 410 (\$1.35); for February, 422 (\$1.39); for March, 432 (\$1.42); for April, 439 (\$1.44).

Wheat
1959-60

The wheat market weakened during the period under review, both as regards quantities bought and sold, and as regards prices. At the end of November from 385 to 388 pesos per 100 kilos (\$1.27 to \$1.28 per bushel) were paid f.o.r. Rosario port, while earlier in the same month 400 pesos (\$1.32 per bushel) had been paid. As well prices for previous crop hard wheats decreased somewhat in Buenos Aires, during the last half of November from 395 to 390 pesos per 100 kilos (\$1.30 to \$1.28 per bushel), but they again increased during the first week of December. Sales were made then at about 395-397 pesos (\$1.30-\$1.31 per bushel) while 385-386 (\$1.27 per bushel) were paid for semi hard wheat, both grade 1, 80 kilos per hectolitre (64 pounds per bushel) basis.

Grain Board sales totalled only 49,090 metric tons (1,804,000 bushels) during the period under review. This total included: 29,240 tons (1,074,000 bushels) of the 1958-59 and 1959-60 crop sold to local millers at 3,900 pesos per ton (\$1.28 per bushel); 18,000 tons (661,000 bushels) of the 1958-59 crop sold for export at 4,044 and 4,053 pesos (\$1.33 per bushel); 1,600 tons (59,000 bushels) also for export of Candeal-Taganrog type (1958-59 crop) sold at 4,010 pesos (\$1.32 per bushel); and a small lot of the same type (1957-58 crop) sold at 3,000 pesos (99 cents per bushel).

Wheat shipments totalled 149,799 metric tons (5,504,000 bushels) during November, the lowest tonnage for any single month of this year. Brazil took more than half of it, 83,250 tons (3,059,000 bushels), while Chile bought 20,806 (764,000 bushels) and Lebanon, 17,383 (639,000 bushels). Other buyers were: Italy, Netherlands, West Germany, Belgium, Norway, Peru and Paraguay.

At the end of the crop year 1959-60, very little wheat is available, only the 500,000 or 550,000 metric tons (18,372,000 or 20,209,000 bushels) that the Grain Board had already announced it intended to keep back as a reserve stock. Our own statistical table shows higher tonnage, but it includes grain already committed for export, but not yet actually shipped.

With the poor crop (1960-61) in prospect, it seems that Argentina's wheat stocks will be at a dangerously low level in 1961.

Argentine Wheat Exports December 1959-November 1960 with Comparisons

Destination	Wheat	Destination	Wheat
	- thousand bushels -		- thousand bushels -
Austria	925	Netherlands	4,239
Belgium	1,359	Norway	551
Bolivia	18	Paraguay	2,707
Brazil	38,590	Peru	7,284
Chile	4,596	Portugal	735
Denmark	58	Sweden	18
France	2,380	Switzerland	342
Germany	8,535	United Kingdom	10,123
Italy	3,234	Venezuela	186
Lebanon	2,454		
		Total	88,333

Same Period:

December-November 1958-59	96,132
1957-58	73,029
1956-57	99,136
1955-56	95,945
1954-55	130,463

Policy

International Wheat Agreement The Argentine House of Deputies officially ratified this agreement on the 15th December 1960,

but ratification by the Senate and final promulgation still has to be carried out.

CALENDAR OF WHEAT EVENTS

- December 13 The 1960 season of navigation closed at the Canadian Lakehead. Final loadings for the 1960 season, which opened on April 10, placed the lake shipping total at 278.7 million bushels of the five principal grains, a decline of 3 per cent from the 1959 total of 286.2 million.
- 15 According to a report from Mr. Ian R. Smyth, Assistant Commercial Secretary for Canada, Melbourne, the 1960-61 Australian wheat crop was, at that time, estimated at a record 246 million bushels.
- 16 According to the Annual Summary of Crop Production published by the United States Department of Agriculture, the estimated production of all wheat in the United States in 1959 has been revised from 1,128.2 million to 1,126.7 million bushels while the 1960 production has been decreased from 1,368.2 million to 1,363.4 million bushels.
- 20 According to a report published by the Crop Reporting Board of the United States Department of Agriculture, a 1961 winter wheat crop of 1,034 million bushels is indicated on the basis of conditions at December 1 and other factors.
- 27 The United States Department of Agriculture announced that durum wheat had been added to the classes of wheat eligible for export payments under the payment-in-kind export program for wheat.
- 30 According to a report received from Mr. C.S. Bissett, Commercial Counsellor for Canada, Buenos Aires, the first official production estimate placed the 1960-61 wheat crop in Argentina at 4.1 million metric tons (150.6 million bushels).

EXPORTS OF CANADIAN WHEAT* AND WHEAT FLOUR**

(SPECIFIED PERIODS)

MILLION BUSHELS

400 —

350 —

300 —

250 —

200 —

150 —

100 —

50 —

0

MILLION BUSHELS

400 —

350 —

300 —

250 —

200 —

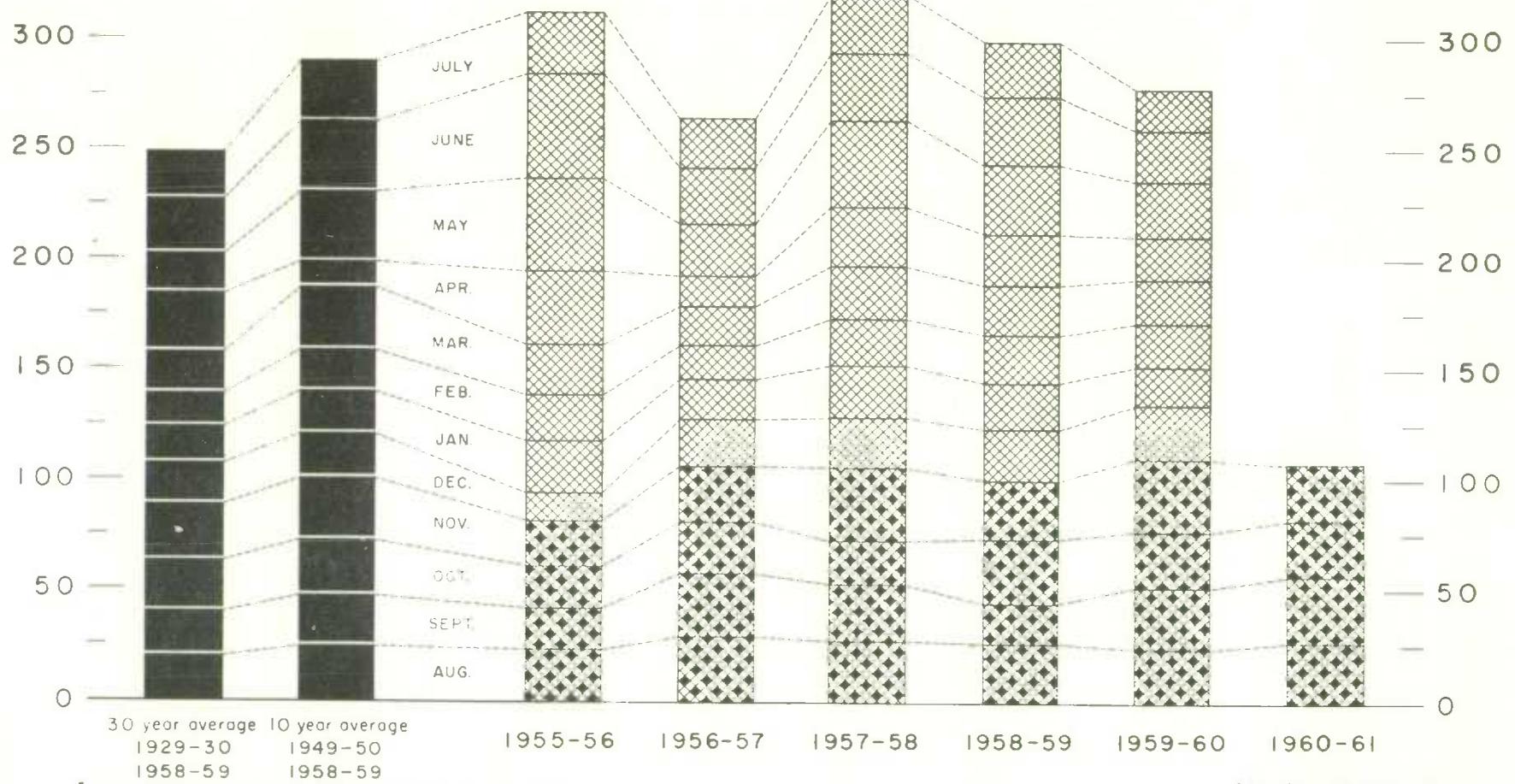
150 —

100 —

50 —

0

PEAK EXPORTS
1928-29 CROP YEAR
407.6 MILLION BUSHELS



*includes bagged seed wheat. **In terms of grain equivalent.



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