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AGRICULTURE DIVISION

# THE WHEAT REVIEW



NOVEMBER 1964



DOMINION BUREAU OF STATISTICS

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THE  
WHEAT REVIEW

NOVEMBER 1964

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## TABLE OF CONTENTS

	<u>Page</u>
World Wheat Situation	
August-October Exports Maintain Record Level .....	1
Wheat Supplies of Four Major Exporters Decline from Last Year .....	1
I.W.C. Reports on Wheat Trade .....	2
I.W.C. Cumulative Totals of Commercial Purchases .....	3
Canadian Situation	
Supply Lower Than Last Year's Record .....	4
Exports Decline 4 per cent from Last Year .....	4
Marketings, Disappearance and Visible Supplies .....	5
October 1964 Exports of Wheat and Flour Total 42.2 Million Bushels.....	6
Lake Shipments of Canadian Grain .....	6
Wheat Shipments to the United States by Destination .....	7
Rail Shipments of Wheat to Maritime Ports .....	7
Farmers' Marketings .....	8
General Quota Position .....	8
Visible Supply of Canadian Wheat .....	9
Grading of Wheat Inspected, August-October 1964 with Comparisons .....	9
Weekly Visible Supply and Farmers' Marketings (Charts) .....	10
Rail Shipments of Wheat from Fort William-Port Arthur .....	11
Overseas Exports of Canadian Grain by Ports of Loading .....	11
Freight Assistance Shipments .....	12
Monthly Exports of Canadian Wheat and Wheat Flour .....	13
Exports of Canadian Wheat and Wheat Flour by Destination, Crop Years	
1963-64 and 1962-63 .....	14
Exports of Canadian Wheat by Destination .....	17
Customs Exports of Canadian Wheat Flour by Countries of Consignment .....	20
Canadian Wheat Board Weekly Average Cash Wheat Prices .....	22
Canadian Flour Milling Situation	
Production and Exports .....	24
United States Situation	
Supply Position .....	25
Winter Wheat Growth Slow .....	26
Outlook for Wheat in 1965 .....	26
United States Wheat and Flour Exports Continue Upward Trend .....	28
Cash Wheat Prices on the Kansas City and Minneapolis Markets .....	33
Chicago Wheat Futures, High Points of Closing .....	33
Argentine Situation .....	34
Australian Situation .....	38
Wheat Situation in West Germany .....	41
Wheat Situation in Italy .....	44
Crop Situation in Britain .....	46
Wheat Situation in Japan .....	47
Calendar of Wheat Events .....	49

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# WORLD WHEAT SITUATION

## August-October Exports Maintain Record Level

Total exports of wheat and wheat flour in terms of grain from the four major exporting countries during the August-October period of the current Canadian crop year amounted to 393.4 million bushels and exceeded by about one per cent the previous record total of 391.2 million exported during the same months a year ago. In addition, this year's August-October exports of wheat and flour represent a margin of 68 per cent over the ten-year (1953-62) average shipments for the first quarter of the crop year, of some 234.4 million bushels. Based on the crop year August-July, increased exports from Argentina and United States more than offset the declines recorded for Canada and Australia.

Shipments from the four traditional major wheat exporters during August-October 1964 with comparisons appear in the accompanying table.

## Exports of Wheat and Flour in Terms of Wheat, August-October 1964 with Comparisons

August-October	United States	Canada	Argentina	Australia	Total
- million bushels -					
1950 .....	51.4	49.3	17.2	30.9	148.8
1951 .....	116.0	75.4	17.9	30.5	239.8
1952 .....	85.1	94.6	-	23.0	202.7
1953 .....	54.8	79.2	32.5	16.6	183.1
1954 .....	53.8	73.8	33.7	21.5	182.8
1955 .....	54.4	60.1	30.2	23.2	167.9
1956 .....	118.8	81.4	24.2	40.9	265.3
1957 .....	100.7	73.5	21.8	24.9	220.9
1958 .....	108.2	73.8	21.4	16.2	219.6
1959 .....	100.3	76.3	15.1	20.4	212.1
1960 .....	150.8	81.8	25.5	27.7	285.8
1961 .....	180.0	106.2	6.1	55.9	348.2
1962 .....	140.2	84.7	10.7	23.2	258.8
1963 <sup>1/</sup> .....	191.8	139.6	12.5	47.3	391.2
1964 <sup>2/</sup> .....	195.2	133.6	27.2	37.4	393.4

<sup>1/</sup> Revised.

<sup>2/</sup> Preliminary.

## Wheat Supplies of Four Major Exporters Decline from Last Year

Supplies of wheat held by the four traditional major exporters at November 1, 1964, for export and for carry-over (less estimated domestic requirements to the end of their respective crop years) amounted to 2,219.2 million

bushels, 11 per cent smaller than the 2,492.8 million available at the same time a year ago. As indicated by the accompanying figures, smaller totals in United States, Canada and Australia more than offset larger supplies in Argentina. Supplies at November 1, 1964, in millions of bushels, were held as follows, with last year's comparable figures in brackets: United States, 1,319.4 (1,499.8); Canada, 767.4 (915.5); Argentina, 94.9 (26.9); and Australia, 37.5 (50.6).



IWC Reports  
on Wheat Trade

The International Wheat Council held its Fortieth Session in London from November 18 to 24, 1964. The Session was attended by delegates from thirty-three member countries and by observers from the Food and Agriculture Organization and from the Commission of the European Economic Community.

The membership of the Council totals forty-eight countries, of which ten are exporting countries and thirty-eight importing countries.

Outlook for 1964-65 World wheat production in 1964-65 (excluding Mainland China) is provisionally estimated at a new record of 236 million tons, about 14 million tons above 1963-64 and the average for the previous 5 years. The increase is attributable to the recovery of production in the U.S.S.R. and Western Europe, a slight expansion in North America and expected large crops in Argentina and especially Australia. There were, however, declines in Asia, Africa and possibly Eastern Europe.

The increase in the size and the changes in the distribution of world production are likely to have a marked effect on the volume and pattern of world trade in 1964-65 (July-June) which is likely to decline to around 45 million tons. At this level it will be about 10 million tons below last year's total, but still above the five-year average. There is likely to be a sharp fall in exports to the traditional import markets of Western Europe, and to the U.S.S.R. which despite the recovery in production may not re-enter international markets on a big scale. On the other hand, a further increase in shipments to the developing countries of Africa, Latin America and Asia, particularly Far East Asia, is expected. The biggest single factor is likely to be the heavy imports by India. Imports into Eastern Europe may show little change from the level of recent years (5 million tons) but, as in 1963-64, purchases from outside the U.S.S.R. will be substantial. Exports to China, which since 1960-61 have exceeded expectations by their continuing expansion, will once again be large and may not be significantly less than the 5 million tons imported during each of the last two years. With the contraction of import demand, prices of soft and medium hard wheats have tended to decline since August 1964 but prices of hard wheats have remained firm. Import prices on c.i.f. basis have also been influenced by the relative firmness of ocean freight rates, due partly to seasonal factors. Carryover stocks in exporting countries, which had declined by 9 million tons to 43 million tons at the end of 1963-64 appear likely to rise again to 47 million tons by the close of the 1964-65 season.

Trade in wheat flour The Council discussed a special study prepared by the Secretariat on various aspects of the trade in wheat flour. This was a revised and expanded version of a preliminary paper which had been presented to the Council at its previous session in June last. After further revision to take account of points emerging from the discussion it was agreed that the document should be published as Secretariat Paper No. 5.

Conclusions In its comments on the exceptional conditions of the international market in the crop year 1963-64 the Council observed that:

"The existence of the Agreement as a central institution in wheat affairs and the procedures of consultation which had developed under successive Agreements no doubt played a part in the responsible selling policies pursued by exporting countries, as a result of which prices did not reach

continued on page 49

International Wheat Council  
Cumulative Totals of Commercial Purchases by Importing Countries from Exporting Countries  
Crop Year 1964-65 — Through October 31, 1964

Importing Countries	EXPORTING COUNTRIES							Total
	Canada	Argentina	Australia	France	Italy	Sweden	U.S.A.	Purchases
- thousand bushels -								
Austria .....	679	-	-	-	-	-	-	679
Belgium & Luxembourg .....	5,179	371	-	350	-	-	77	5,977
Brazil .....	-	6,246	-	-	-	-	4	6,250
Costa Rica .....	307	-	-	9	-	-	285	601
Cuba .....	-	-	-	-	-	-	-	-
Dominican Republic .....	454	-	-	-	-	-	22	476
Ecuador .....	660	-	-	-	-	-	82	742
El Salvador .....	335	-	-	-	-	-	288	623
Finland .....	-	-	-	-	-	1	-	1
Germany, Federal Republic ..	9,518	201	36	816	-	1,720	687	12,978
Greece .....	7	-	-	-	-	-	7	14
Guatemala .....	48	-	-	-	-	-	646	694
Iceland .....	-	-	-	-	-	-	40	40
India .....	-	-	2,801	-	-	-	1	2,802
Indonesia .....	-	-	232	17	-	-	-	249
Ireland .....	-	-	591	-	-	-	56	647
Israel .....	529	-	-	-	-	-	811	1,340
Japan .....	21,266	-	8,028	981	-	-	14,813	45,088
Korea .....	-	-	-	-	-	-	1	1
Liberia .....	26	-	-	-	-	-	28	54
Libya .....	-	-	5	3	182	-	-	190
Netherlands .....	3,151	2,773	-	18	-	-	4,145	10,087
Netherlands Territories ..	89	-	-	-	-	-	248	337
New Zealand .....	-	-	2,231	-	-	-	-	2,231
Nigeria .....	72	-	-	-	-	-	646	718
Norway .....	1,601	216	1,693	960	-	1,615	-	6,085
Peru .....	619	2,321	9	-	-	-	591	3,540
Philippines .....	5,088	-	935	896	-	-	2,189	9,108
Portugal .....	19	-	-	-	-	-	372	391
Portuguese Territories ...	49	441	8	28	-	-	395	921
Saudi Arabia .....	462	-	265	-	1	-	1,771	2,499
Sierra Leone .....	221	-	-	4	-	-	21	246
South Africa .....	944	-	-	-	-	-	-	944
Switzerland .....	2,737	26	-	795	13	-	7	3,578
Tunisia .....	-	-	-	799	-	-	-	799
United Arab Republic .....	-	-	-	-	742	-	11	753
United Kingdom .....	44,754	1,844	8,589	3,045	-	-	1,166	59,398
U.K. Territories .....	1,280	-	1,871	140	-	-	924	4,215
Vatican City .....	-	-	-	-	-	-	-	-
Venezuela .....	8,443	373	-	-	-	-	3,973	12,789
Western Samoa .....	-	-	48	-	-	-	1	49
To Orders .....	-	-	-	-	-	735	-	735
Totals .....	108,537	14,812	27,342	8,861	938	4,071	34,308	198,869
Percentage of Total Sales by Exporting Countries .....	54.58	7.45	13.75	4.45	0.47	2.05	17.25	100.00

NOTE: Mexico, Spain and U.S.S.R. - no sales reported.  
 Argentina - Quantities cover period ending September 18, 1964.  
 France - Quantities cover period ending October 17, 1964.  
 Italy - Quantities cover period ending October 3, 1964.



# CANADIAN SITUATION

## Supplies Lower Than Last Year's Record

Reflecting a relatively small decline in carryover stocks combined with a 17 per cent decrease in production, total supplies of wheat for the 1964-65 (August-July) crop year, at 1,061.0 million bushels, are 12 per cent less than the record 1963-64 total of 1,210.7 million. Supplies of the size indicated are, however, still the fifth largest on record. After making an allowance of 160.0 million bushels for anticipated domestic requirements, supplies available for export and for carryover during 1964-65 amount to 901.0 million bushels, 15 per cent below the 1,055.1 million in 1963-64.

## Exports Decline 4 per cent from Last Year

During the August-October period of the current crop year exports of wheat as grain amounted to 125.4 million bushels compared with 131.1 million exported during the same months a year ago. Exports of wheat flour, in terms of wheat, during August-October this year were estimated at 8.2 million bushels, bringing total exports of wheat and flour during the first quarter of the crop year to 133.6 million bushels, a level surpassed only by the record total of 139.6 million exported during the comparable period of last year. The balance remaining on November 1, 1964 for export and for carryover, amounted to 767.4 million bushels, 16 per cent below the November 1, 1963 total of 915.5 million.

## Canadian Wheat Supplies

Item	1963-64 <u>1/</u>	1964-65 <u>2/</u>
	- million bushels -	
Carryover in North America at beginning of crop year (August 1) .....	487.2	460.6
Production .....	723.4	600.4
Imports of wheat for domestic use, August-October ..	<u>3/</u>	<u>4/</u>
Total estimated supplies .....	1,210.7	1,061.0
Less estimated domestic requirements for crop year .	155.6 <u>5/</u>	160.0
Available for export and for carryover.	1,055.1	901.0
Deduct:		
Exports of wheat in bulk, August-October <u>6/</u> .....	130.8	125.1
Exports of bagged seed wheat, August-October <u>7/</u> ...	0.3	0.2
Total exports of wheat as grain .....	131.1	125.4
Exports of wheat flour in terms of wheat, August- October <u>7/</u> .....	8.4	8.2
Total exports of wheat and wheat flour .....	139.6	133.6
Balance on November 1 for export and for carryover .	915.5	767.4

1/ Subject to revision. 2/ Preliminary. 3/ Less than 50,000 bushels. 4/ Not available. 5/ Revised. 6/ As reported by the Board of Grain Commissioners. (Includes overseas clearances and imports into the United States). 7/ Customs returns, 1963-64 adjusted for time lag.



The following statement is taken from the report on Grains and Feeds as prepared for the Federal-Provincial Agricultural Outlook Conference, November 21, 1964:

"Although it cannot be expected that the record high level of exports of 1963-64 will be matched in 1964-65, nevertheless this crop year promises to be above average insofar as Canadian wheat exports are concerned. The carryover from 1963-64 is comprised mainly of top grades but greater supplies of the lower grades will be available from the 1964 crop. Thus there will be ample supplies of wheat of most grades available. A favourable factor this year is the exceptionally high average protein content of the 1964 crop. Agreements concluded with Mainland China and several Eastern European countries assure a heavy movement to these markets. Forward sales for the current crop year are encouraging and a total export in the neighbourhood of 375 million bushels of wheat and flour is anticipated.

In spite of the promising outlook total utilization of wheat will not equal the volume produced in 1964 and thus a build-up of 50 million to 75 million bushels can be expected in the year-end inventory. This quantity is equivalent to the production from some 3 million acres."

Marketings, Disappearance  
and Visible Supplies

Total primary deliveries of wheat (both east and west) up to November 18 of the current crop year have amounted to 155.5 million bushels compared with 135.9 million marketed during the same period of the previous year. Some 53.9 million bushels of this year's total were delivered during the four weeks October 22 to November 18. During the same period the volume of Canadian wheat entering domestic and export channels amounted to 38.0 million bushels. As a result, the total visible supply of Canadian wheat increased from 305.2 million at October 21 to a level of 321.2 million at November 18, 1964.

The total visible supply of Canadian wheat at November 18 this year represented a decline of 7 per cent from the 1963 comparable total of 346.6 million and a decrease of 12 per cent below the 1962 figure of 363.0 million. The largest reduction occurred in country elevator stocks, with wheat in this position amounting to 157.5 million bushels, about one fifth less than both the 198.5 million of the previous year and the 197.8 million of two years ago. Wheat stocks at interior terminals, at November 18, 1964, totalled 4.6 million bushels and also recorded declines from the 1963 and 1962 comparable levels of 6.3 million and 6.8 million bushels, respectively. Wheat stocks "in transit rail" (Western Division) amounted to 15.7 million bushels as against 21.8 million a year ago and 18.4 million two years ago. Supplies at the Canadian Lakehead, totalling some 41.3 million bushels, exceeded by 19 per cent last year's comparable level of 34.9 million and surpassed by 15 per cent the 1962 figure of 35.9 million bushels. Stocks "in transit lake", amounting to 8.3 million bushels were lower than both the 1963 level of 11.1 million and the 12.4 million of two years ago. The 37.6 million bushels in Bay, Lake and Upper St. Lawrence ports, however, represented considerable margins over the 30.7 million bushels in these same ports a year ago and the 31.3 million two years ago. Supplies in Lower St. Lawrence and Maritime ports, at November 18, 1964, at 32.4 million bushels, were well in excess of the 1963 total of 21.6 million but were slightly lower than the 1962 volume of 33.1 million bushels. The 10.8 million bushels in West Coast ports (Vancouver-New Westminster, Prince Rupert and Victoria) registered a 38 per cent increase over the comparable 1963 total of 7.9 million but was considerably smaller than the 14.1 million in these positions in 1962. With the season of navigation closed at Churchill, supplies at

that port, totalling 4.6 million bushels, are relatively little changed from the 4.8 million bushel level of the two preceding years.

October 1964 Exports of  
Wheat and Flour Total  
42.2 Million Bushels

Combined exports of wheat in bulk, bagged seed wheat and wheat flour in terms of grain equivalent amounted to 42.2 million bushels during October 1964. Although this total was 6 per cent less than the 45.1 million bushels exported the previous month and one-third smaller than the unusually high October 1963 figure of 62.6 million, it still surpassed by a margin of 61 per cent, the ten-year (1953-62) October average of 26.2 million bushels. Exports of wheat in bulk (as reported by the Board of Grain Commissioners) during October 1964 totalled 40.1 million bushels, some 76 per cent greater than the ten-year average for October of 22.8 million but sharply below the October 1963 figure of 59.0 million and slightly less than the September 1964 total of 42.8 million bushels. Exports of bagged seed wheat during October 1964, based on Canadian Customs returns, amounted to 27 thousand bushels compared with the October 1963 total (adjusted to remove time lag) of only 15 thousand. Customs returns also indicate that the equivalent of 2.0 million bushels of wheat was exported in the form of flour during October 1964, representing only a 4 per cent decline from the 2.1 million of the previous month but 42 per cent less than the October 1963 adjusted figure of 3.5 million.

Cumulative exports of wheat in bulk during the first quarter (August-October) of the current crop year amounted to 125.1 million bushels, some 4 per cent less than the comparable 1963 total of 130.8 million, but sharply above the ten-year average for the period of 69.3 million. The principal markets for Canadian wheat in bulk during the first three 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: Communist China, 20.9 (6.0); Britain, 18.8 (24.0); Czechoslovakia, 15.3 (1.4); Japan, 15.3 (12.8); Poland, 13.0 (7.3); Federal Republic of Germany, 6.6 (14.2); Democratic Republic of Germany, 6.0 (nil); Belgium and Luxembourg, 3.6 (7.7); India, 3.2 (nil); Venezuela, 2.8 (2.0); the Philippines, 2.0 (2.5); and Italy, 2.0 (2.6).

Cumulative exports of wheat flour during the first three months of the 1964-65 crop year, based on Customs returns, were the equivalent of 8.2 million bushels, 2 per cent below the adjusted August-October 1963 total of 8.4 million bushels. The leading markets for Canadian wheat flour in terms of grain equivalent during the August-October period of the 1964-65 crop year, with revised data for the same months of the preceding crop year in brackets, were as follows, in thousands of bushels: Britain, 2.453 (3,157); U.S.S.R. (Russia), 1,689 (950); Cuba, 1,134 (400); Jamaica, 365 (364); Trinidad, 328 (431); Ghana, 259 (194); Leeward and Windward Islands, 228 (269); United States, 237 (222); and Costa Rica, 203 (129).

Lake Shipments of  
Canadian Grain

Total shipments of the five major grains out of Lakehead terminals from the opening of navigation to November 18 this year amounted to 389.9 million bushels and represented an increase of 41 per cent over the 277.2 million shipped during the comparable period of 1963. In 1964 the season of navigation opened on April 2 while the 1963 season opened on April 19. Shipments of wheat at 309.0 million bushels, accounted for 79 per cent of the current total. During the period under review shipments of wheat, barley, rye and flaxseed were above last year's corresponding levels, while those for oats were lower.



Lake Shipments of Canadian Grain from the Opening of Navigation to November 18, 1964  
and to Approximately the Same Date, 1953 to 1963

Year	Wheat	Oats	Barley	Rye	Flaxseed	Total
- thousand bushels -						
1953 .....	187,441	86,386	102,234	15,547	5,848	397,457
1954 .....	116,051	50,817	73,006	6,750	4,147	250,770
1955 .....	115,610	28,727	57,984	10,083	7,837	220,241
1956 .....	179,241	40,583	81,464	10,174	9,558	321,020
1957 .....	134,292	41,831	50,001	4,147	10,620	240,891
1958 .....	161,762	39,780	66,459	5,242	7,991	281,233
1959 .....	154,315	28,875	45,815	4,651	6,131	239,787
1960 .....	158,533	24,013	45,568	3,515	8,129	239,757
1961 .....	198,540	22,593	38,835	4,210	7,240	271,419
1962 .....	146,110	21,251	25,714	5,308	7,522	205,905
1963 .....	194,919	38,053	34,587	3,575	6,058	277,191
1964 .....	309,006	30,826	36,397	4,922	8,718	389,871

Wheat Shipments to  
the United States  
by Destination

There were no vessel and rail shipments of wheat to the United States, either for re-export or retention for domestic use, from the beginning of the current crop year to November 18, 1964. During the comparable periods of 1963 and 1962 shipments amounted to 203 thousand and 30 thousand bushels, respectively.

Rail Shipments  
of Wheat to  
Maritime Ports

Rail shipments of wheat to Maritime Ports from Bay, Lake and Upper St. Lawrence Ports during August-October 1964 amounted to 1,883 thousand bushels compared with the August-October 1963 figure of 3,650 thousand.

Rail Shipments of Wheat to Maritime Ports from Bay  
Lake and Upper St. Lawrence Ports

Origin of Shipment	August 1-October 31, 1963	August 1-October 31, 1964
- bushels -		
Goderich .....	535,194	601,804
Port McNicoll .....	1,764,177	633,895
Midland, Tiffin .....	664,939	406,546
Owen Sound .....	685,714	240,671
Totals .....	3,650,024	1,882,916

Farmers' Marketings Deliveries of wheat from farms in the Prairie Provinces up to November 18 of the current crop year amounted to 150.4 million bushels, representing an increase of 15 per cent over the comparable 1963 total of 131.1 million and 68 per cent above the ten-year (1953-62) average for the period of 89.3 million bushels.

Farmers' Marketings 1/ of Wheat in the Prairie Provinces 1964-65

Week Ending		Manitoba	Saskatchewan	Alberta <u>2/</u>	Total <u>2/</u>	Last Year <u>2/</u>
- bushels -						
August	12, 1964 ....	75,662	409,500	98,247	583,409	543,483
	19 .....	165,645	350,728	200,845	717,218	813,982
	26 .....	606,652	1,186,624	360,697	2,153,973	2,958,768
September	2 .....	259,162	1,731,216	542,073	2,532,451	3,670,105
	9 .....	626,938	2,337,139	282,197	3,246,274	7,414,702
	16 .....	2,861,693	3,000,932	736,446	6,599,071	8,978,421
	23 .....	4,677,736	10,134,664	3,309,300	18,121,700	6,291,301
	30 .....	2,253,868	11,072,846	2,974,796	16,301,510	9,604,797
October	7 .....	1,436,956	7,197,702	3,090,763	11,725,421	11,308,739
	14 .....	1,575,017	7,043,761	6,481,794	15,100,572	8,789,151
	21 .....	1,816,060	11,532,537	6,007,602	19,356,199	11,558,396
	28 .....	2,311,743	10,169,173	4,069,997	16,550,913	14,989,546
November	4 .....	2,583,044	6,802,878	3,630,412	13,016,334	15,281,709
	11 .....	2,063,739	7,630,517	3,107,184	12,801,440	13,599,259
	18 .....	1,836,676	6,766,380	2,980,075	11,583,131	15,332,440
Totals .....		25,150,591	87,366,597	37,872,428	150,389,616	131,134,799
Average similar period:						
1953-62 .....		10,722,323	56,129,743	22,473,317	89,325,383	

1/ Includes receipts at country, interior private and mill elevators, interior semi-public terminals and platform loadings. 2/ Revised.

General Quota Position By December 7, 1964, out of a total of 1,907 shipping points in the Western Division, the Canadian Wheat Board had placed 280 points on a quota of six bushels per specified acre, 429 points on a five-bushel quota and 702 points on a four-bushel quota. Of the remainder 429 points were on a three-bushel quota and 64 were on a two-bushel quota per specified acre. Only three stations were reported as "closed".

Summary of Elevator Shipping Points in the Western Division  
as at December 7, 1964

Province	General Quota in Bushels per Specified Acre					Closed	Total
	Two	Three	Four	Five	Six		
Ontario .....	-	-	-	-	1	-	1
Manitoba .....	-	9	136	126	71	-	342
Saskatchewan .....	16	239	390	230	154	3	1,032
Alberta .....	48	181	176	73	49	-	527
British Columbia .....	-	-	-	-	5	-	5
All Provinces .....	64	429	702	429	280	3	1,907



Visible Supply of Canadian Wheat, November 18, 1964  
Compared with Approximately the Same Date, 1962 and 1963

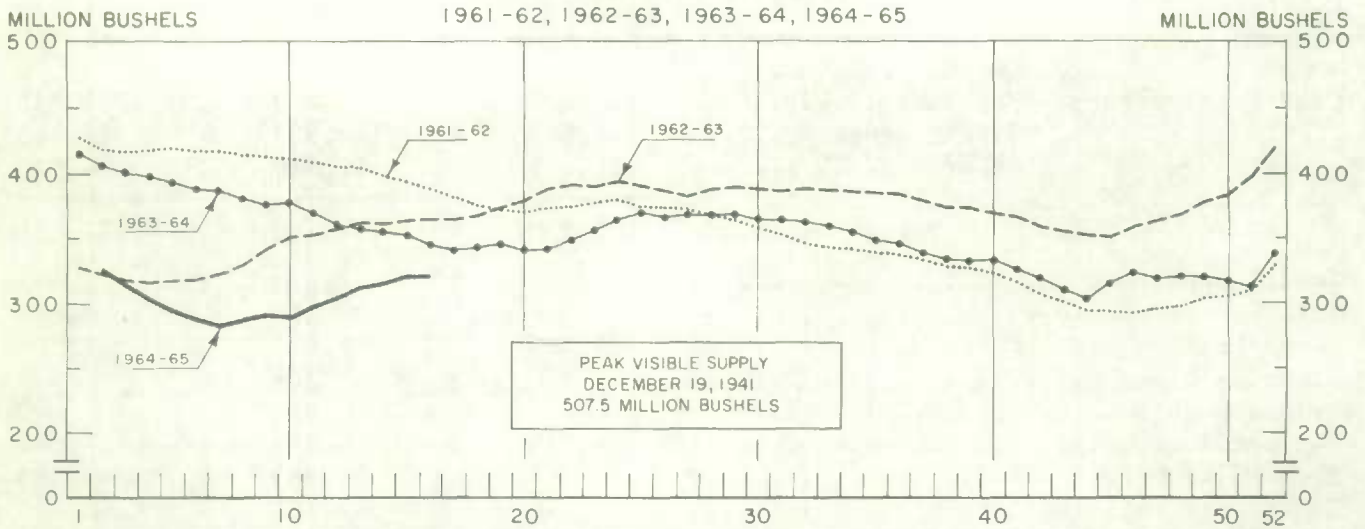
Position	1962	1963	1964
- thousand bushels -			
Country elevators - Manitoba .....	22,823	19,263	15,717
Saskatchewan .....	116,827	118,853	86,983
Alberta .....	58,179	60,429	54,824
Totals .....	197,830	198,544	157,525
Interior private and mill .....	7,979	7,120	7,445
Interior terminals .....	6,826	6,276	4,643
Vancouver-New Westminster .....	12,810	6,837	9,301
Victoria .....	970	386	905
Prince Rupert .....	271	654	640
Churchill .....	4,845	4,759	4,647
Fort William-Port Arthur .....	35,860	34,885	41,345
In transit rail (Western Division) .....	18,446	21,791	15,746
Bay, Lake and Upper St. Lawrence ports ..	31,282	30,699	37,569
Lower St. Lawrence and Maritime ports ...	33,120	21,610	32,411
In transit lake .....	12,431	11,133	8,345
In transit rail (Eastern Division) .....	322	1,904	648
Totals .....	362,991	346,597	321,170

Grading of Wheat Inspected, August-October 1964, with Comparisons

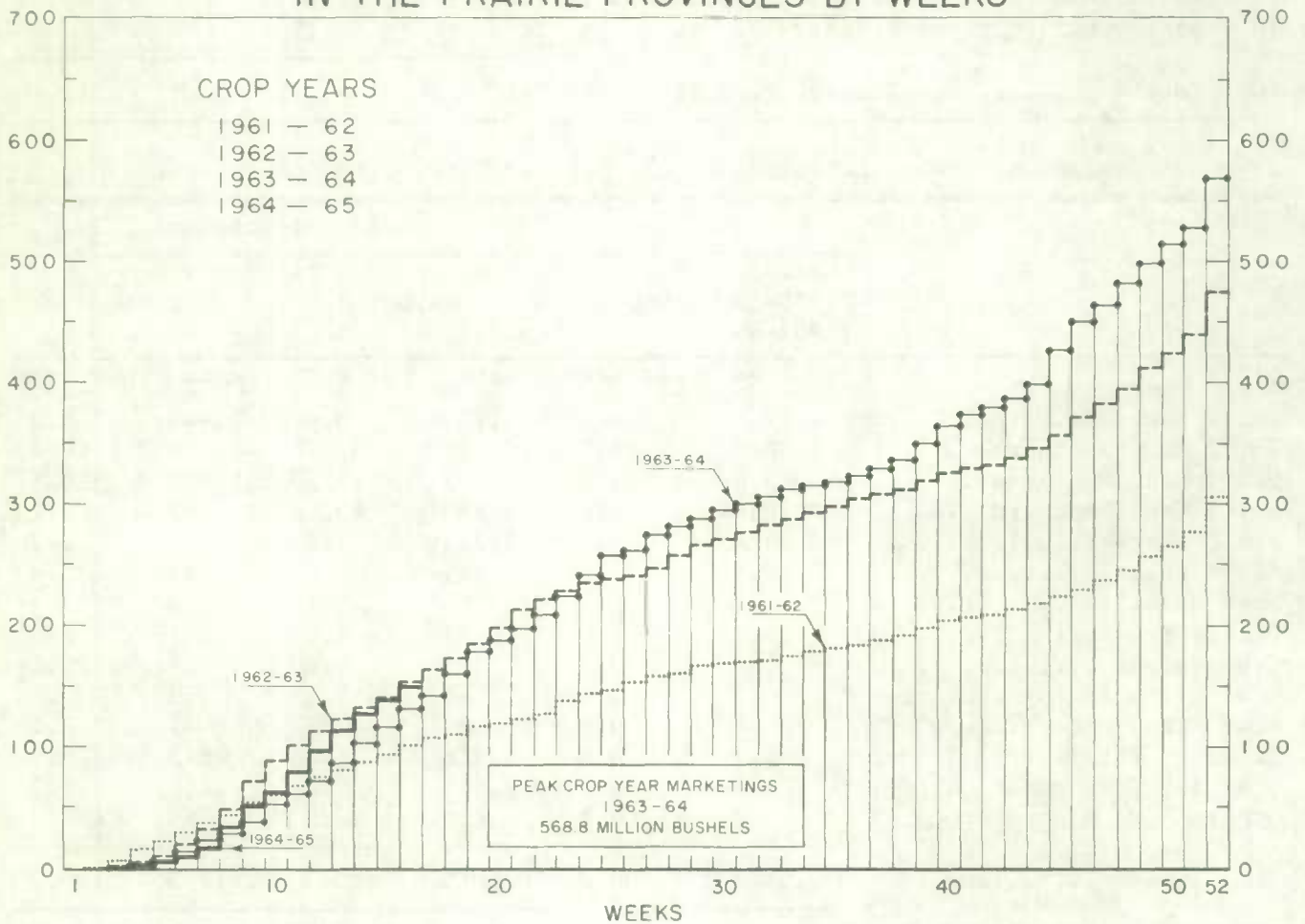
Grade	Crop Year		August-October			
	Average					
	1958-59 1962-63	1963-64	1963	1964		
	per cent	per cent	cars	per cent	cars	per cent
No. 1 Man. Northern .....	7.6	4.8	3,751	5.6	2,966	3.3
No. 2 Man. Northern .....	38.0	49.2	25,252	37.7	43,918	49.4
No. 3 Man. Northern .....	22.6	25.1	12,893	19.2	21,947	24.7
No. 4 Man. Northern .....	10.0	6.6	9,109	13.6	4,662	5.2
No. 5 Wheat .....	4.4	3.4	4,285	6.4	2,381	2.7
No. 6 Wheat .....	0.6	0.5	679	1.0	487	0.5
Feed Wheat .....	1/	1/	5	1/	7	1/
Others Red Spring .....	10.1	3.0	4,622	6.9	7,105	8.0
C.W. Garnet .....	0.1	0.4	415	0.6	165	0.2
C.W. White Spring .....	0.1	0.1	67	0.1	60	0.1
C.W. Mixed Wheat .....	1/	0.1	25	1/	45	0.1
Alberta Winter .....	0.2	0.9	1,216	1.8	813	0.9
Nos. 1-6 C.W. Amber Durum .	6.0	5.7	4,573	6.8	4,162	4.7
Others C.W. Amber Durum ...	0.2	0.2	126	0.2	240	0.3
Totals .....	100.0	100.0	67,018	100.0	88,958	100.0
Gross bushels (approx.) ...			129,180,000		172,450,000	

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, 1961-62—1964-65

Month	1961-62	1962-63	1963-64	1964-65
- bushels -				
August .....	20,648	13,933	5,500	7,786
September .....	14,598	11,657	9,104	19,564
October .....	33,944	22,716	25,355	12,135
November .....	22,915	12,024	13,500	
December .....	60,167	12,778	23,047	
January .....	126,533	39,534	58,772	
February .....	68,421	22,967	28,768	
March .....	37,000	86,398	21,268	
April .....	37,777	69,067	26,063	
May .....	11,203	11,851	7,941	
June .....	16,022	15,746	20,518	
July .....	17,315	11,158	12,707	
Totals .....	466,543	329,829	252,543	

Distribution of Rail Shipments of Wheat from Fort William-Port Arthur, October 1964

Grade	Quebec	Ontario
- bushels -		
5 Wheat .....	1,333	3,000
Durum .....	4,000	-
Others .....	-	3,802
Totals .....	5,333	6,802

Overseas Exports of Canadian Grain by Ports of Loading, August 1-November 18, 1964  
with Comparisons

Port	Wheat 1/	Durum Wheat 1/	Oats 1/	Barley	Rye	Flaxseed	Rapeseed 2/
- bushels -							
<u>Pacific Seaboard</u>							
Van.-New West. ....	46,783,783	-	223,435	4,048,827	81,520	1,450,510	340,586
Victoria .....	2,190,822	-	-	-	-	-	-
Prince Rupert .....	2,554,010	-	-	-	-	-	-
Churchill .....	21,644,772	-	-	-	-	-	-
Lakehead Direct .....	979,707	521,071	451,739	941,145	457,500	1,892,239	58,659
<u>St. Lawrence</u>							
Montreal .....	17,525,887	3,555,191	248,528	46,667	11,440	1,327,186	-
Sorel .....	7,550,069	208,457	-	-	-	42,629	-
Three Rivers .....	3,793,799	284,630	-	-	176,600	56,684	-
Quebec .....	6,119,400	1,392,907	-	-	-	-	-
Baie Comeau .....	23,011,908	4,199,435	-	-	-	152,995	-
Totals .....	132,154,157	10,161,691	923,702	5,036,639	727,060	4,922,243	399,245
Aug. 1-Nov. 20, 1963 .	163,638,859	11,352,288	3,901,207	5,207,028	1,248,705	3,432,663	1,662,228

1/ Excluding bagged seed.

2/ In bushels of 50 pounds.

Freight Assistance Shipments Claims filed for payment up to October 31, 1964 represent the movement of 1,598 thousand bushels of wheat from the Prairie Provinces to Eastern Canada and British Columbia under the freight assistance policy during the August-September period of the 1964-65 crop year. During the same months last year claims had been filed for a total of 2,745 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-September shipments of wheat under the policy were running about 42 per cent below those of 1963. Revised data on the August-September 1963 shipments of wheat based on claims submitted up to October 31, 1964 place the two-month total at 3,200 thousand bushels. The bulk of the shipments during the current two months under review went to destinations in Quebec and Ontario, with these two provinces accounting for 50 per cent and 27 per cent of the total, respectively.

Provincial Distribution of Wheat Shipments under the Freight Assistance Policy  
August - September 1964 and 1963

Month	Nfld.	P.E.I.	N.S.	N.B.	Que.	Ont.	B.C.	Total
- thousand bushels -								
August, 1964 .....	59	6	92	36	431	235	55	914
September .....	3	10	64	23	372	192	21	684
Totals <u>1/</u> .....	62	16	156	59	803	427	76	1,598
Same period 1963:								
Preliminary <u>2/</u> .....	22	21	273	91	1,071	1,143	125	2,745
Revised <u>1/</u> .....	39	28	310	101	1,240	1,200	282	3,200

Preliminary data on millfeed shipments under the freight assistance policy indicate shipments of 59,618 tons during the August-September period of the current crop year. During the same two months of 1963 claims had been filed for a total of 62,844 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-September shipments of millfeeds under the policy were running about 5 per cent below those of 1963. Revised data on the 1963 August-September shipments of millfeeds based on claims submitted up to October 31, 1964 place the two-month total at 81,590 tons. As with freight-assisted shipments of wheat, the greater portion of the millfeed shipments during the period under review went to destinations in Quebec and Ontario.

Provincial Distribution of Millfeed Shipments under the Freight Assistance Policy  
August - September 1964 and 1963

Province	1963		1964
	Preliminary <u>2/</u>	Revised <u>1/</u>	Preliminary <u>1/</u>
- tons -			
Newfoundland .....	536	1,066	888
Prince Edward Island .....	1,103	1,341	1,351
Nova Scotia .....	3,716	4,683	3,675
New Brunswick .....	3,723	4,385	3,707
Quebec .....	31,666	42,156	30,610
Ontario .....	19,147	22,614	17,504
British Columbia .....	2,953	5,345	1,883
Totals .....	62,844	81,590	59,618

1/ Based on claims filed up to October 31, 1964.

2/ Based on claims filed up to October 31, 1963.



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>1962-63</u>					
August .....	21,944	157	22,101	2,852	24,953
September .....	25,040	200	25,240	2,604	27,844
October .....	29,705	31	29,737	2,181	31,917
November .....	33,309	144	33,452	2,176	35,628
December .....	20,949	451	21,399	2,305	23,705
January .....	21,486	473	21,959	1,586	23,545
February .....	18,779	743	19,522	1,811	21,333
March .....	19,246	1,373	20,618	2,454	23,072
April .....	28,916	422	29,338	2,330	31,669
May .....	35,355	14	35,369	2,186	37,555
June .....	24,512	<u>4/</u>	24,513	2,837	27,350
July .....	20,854	-	20,854	1,943	22,798
Totals ...	300,095	4,007	304,102	27,265	331,367
<u>1963-64</u>					
August .....	29,204	187	29,391	2,819	32,210
September .....	42,556	129	42,686	2,106	44,791
October .....	59,020	15	59,035	3,520	62,555
November .....	65,296	204	65,499	4,538	70,037
December .....	41,763	388	42,151	6,284	48,435
January .....	28,451	535	28,987	5,829	34,816
February .....	21,675	562	22,237	5,800	28,037
March .....	22,510	484	22,995	5,697	28,692
April .....	43,211	213	43,423	5,530	48,954
May .....	56,992	14	57,006	4,744	61,750
June .....	65,036	144	65,180	3,768	68,948
July .....	61,012	35	61,047	4,275	65,322
Totals ...	536,726	2,912	539,637	54,910	594,548
<u>1964-65</u> <u>5/</u>					
August .....	42,226	44	42,270	4,073	46,343
September .....	42,792	145	42,937	2,133	45,069
October .....	40,120	27	40,147	2,037	42,184
Totals ...	125,138	216	125,354	8,242	133,596

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, 1962-63 and 1963-64 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/ Less than 500 bushels.

5/ Preliminary.

Exports of Canadian Wheat and Wheat Flour by Destination, Crop Years 1963-64 and 1962-63

Destination	Wheat <u>1/</u>	Durum Wheat <u>1/</u>	Wheat Flour <u>2/</u>	Total Wheat <u>1/</u> and Wheat Flour <u>2/</u>	Total Same Period Last Year
- bushels -					
<u>Western Europe</u>					
<u>EEC</u>					
Belgium and Luxembourg .....	14,922,794	572,979	213,185	15,708,958	10,148,604
France .....	2,185,769	2,697,827	-	4,883,596	6,877,184
Germany, Federal Republic .....	29,288,776	7,988,123	-	37,276,899	27,997,114
Italy .....	3,758,777	115,733	805	3,875,315	4,920,150
Netherlands .....	3,039,610	154,168	5,754	3,199,532	4,753,795
Sub-totals .....	53,195,726	11,528,830	219,744	64,944,300	54,696,847
<u>Other Western Europe</u>					
Austria .....	855,613	335,418	-	1,191,031	1,554,304
Britain .....	78,730,658	224,594	11,876,970	90,832,222	89,622,711
Denmark .....	20,543	-	4,936	25,479	33,850
Finland .....	726,133	-	-	726,133	1,681,491
Gibraltar .....	-	-	31,944	31,944	35,806
Greece .....	-	-	16,100	16,100	30,425
Iceland .....	-	-	4,995	4,995	14,573
Ireland .....	2,235,333	-	-	2,235,333	3,470,394
Malta and Gozo .....	1,545,560	-	-	1,545,560	1,094,987
Norway .....	1,702,670	-	115	1,702,785	1,827,658
Portugal .....	-	410,667	109,692	520,359	77,413
Sweden .....	22,400	-	1,265	23,665	170,704
Switzerland .....	5,481,597	2,590,340	-	8,071,937	2,968,546
Sub-totals .....	91,320,507	3,561,019	12,046,017	106,927,543	102,582,862
Totals .....	144,516,233	15,089,849	12,265,761	171,871,843	157,279,709
<u>Eastern Europe</u>					
Albania .....	3,696,468	-	-	3,696,468	-
Bulgaria .....	7,586,165	-	-	7,586,165	-
Czechoslovakia .....	6,570,483	-	-	6,570,483	4,393,895
Poland .....	14,937,653	-	-	14,937,653	14,183,656
U.S.S.R. (Russia) .....	202,569,521	9,634,007	22,174,622	234,378,150	-
Yugoslavia .....	3,501,866	-	-	3,501,866	3,919,975
Totals .....	238,862,156	9,634,007	22,174,622	270,670,785	22,497,526
<u>Africa</u>					
Angola .....	-	-	5,750	5,750	3,680
British Africa, nes .....	-	-	25,185	25,185	78,131
Congo-Leo. ....	-	-	56,925	56,925	95,018
Ethiopia .....	-	-	253	253	-
French West Africa .....	-	-	-	-	23,442
Gambia .....	-	-	8,381	8,381	-
Ghana .....	-	-	1,060,459	1,060,459	1,798,115
Ivory Coast .....	-	-	2,990	2,990	-
Katanga .....	-	-	-	-	9,186
Liberia .....	-	-	61,447	61,447	65,491
Mauritius .....	-	-	-	-	460
Mozambique .....	90,857	11,200	33,578	135,635	589,219

Exports of Canadian Wheat and Wheat Flour by Destination, Crop Years 1963-64 and 1962-63

Destination	Wheat 1/	Durum Wheat 1/	Wheat Flour 2/	Total Wheat 1/ and Wheat Flour 2/	Total Same Period Last Year
- bushels -					
<u>Africa (concluded)</u>					
Nigeria .....	650,889	-	18,044	668,933	1,217,066
Northern Rhodesia .....	37,334	-	-	37,334	-
Nyasaland .....	-	-	25,725	25,725	46,082
Portuguese Africa, nes .....	-	-	76,038	76,038	106,306
Republic of South Africa .....	3,038,286	-	-	3,038,286	7,883,218
Sierra Leone .....	-	-	453,123	453,123	553,355
Southern Rhodesia .....	-	-	4,830	4,830	-
Tanganyika .....	-	-	10,925	10,925	14,708
Togo .....	-	-	150,850	150,850	61,042
U.A.R.-Egypt .....	-	-	-	-	87,970
Totals .....	3,817,366	11,200	1,994,503	5,823,069	12,632,489
<u>Asia</u>					
British Middle East, nes .....	-	-	38,419	38,419	27,614
Burma .....	78,931	-	76,404	155,335	-
Ceylon .....	-	-	1,068,596	1,068,596	1,150
China, Communist .....	41,286,001	-	-	41,286,001	56,443,819
Hong Kong .....	667,706	-	846,844	1,514,550	1,513,550
India .....	721,373	-	-	721,373	703,612
Indonesia .....	-	-	126,224	126,224	152,885
Iran .....	-	-	4,198	4,198	4,519
Iraq .....	-	-	-	-	948
Israel .....	1,603,056	-	-	1,603,056	1,802,957
Japan .....	49,726,319	-	85,284	49,811,603	44,625,158
Jordan .....	-	-	1,122	1,122	1,235
Korea, South .....	511,467	-	-	511,467	-
Kuwait .....	-	-	31,407	31,407	77,484
Lebanon .....	-	-	274,834	274,834	363,457
Malaysia .....	453,413	-	619,699	1,073,112	799,875
Pakistan .....	354,984	-	-	354,984	361,664
Philippines .....	7,300,821	-	7,590	7,308,411	6,752,196
Portuguese Asia .....	-	-	21,344	21,344	10,221
Qatar .....	-	-	1,068	1,068	2,107
Saudi Arabia .....	782,686	-	6,118	788,804	654,921
Syria .....	-	-	1,410	1,410	5,529
Taiwan .....	411,061	-	-	411,061	115,701
Thailand .....	-	-	363,943	363,943	357,922
Viet-Nam .....	-	-	43,776	43,776	44,576
Totals .....	103,897,818	-	3,618,280	107,516,098	114,823,100
<u>Oceania</u>					
Australia .....	-	-	28	28	182
Fiji .....	-	-	6,394	6,394	3,898
French Oceania .....	-	-	1,426	1,426	1,886
United States Oceania .....	461,514	-	1,881	463,395	484,004
Totals .....	461,514	-	9,729	471,243	489,970



Exports of Canadian Wheat and Wheat Flour by Destination, Crop Years 1963-64 and 1962-63

Destination	Wheat <u>1/</u>	Durum Wheat <u>1/</u>	Wheat Flour <u>2/</u>	Total Wheat <u>1/</u> and Wheat Flour <u>2/</u>	Total Same Period Last Year
- bushels -					
<u>Western Hemisphere</u>					
Bahamas .....	-	-	306,171	306,171	299,163
Barbados .....	100	-	165,747	165,847	151,247
Bermuda .....	-	-	121,346	121,346	120,428
British Guiana .....	-	-	38,932	38,932	23,157
British Honduras .....	-	-	39,678	39,678	36,618
Chile .....	-	-	5,778	5,778	12,133
Colombia .....	-	-	1,164	1,164	-
Costa Rica .....	-	-	653,591	653,591	901,890
Cuba .....	7,454,393	-	7,355,662	14,810,055	-
Dominican Republic .....	851,741	-	64,772	916,513	1,298,990
Ecuador .....	1,087,114	-	-	1,087,114	1,199,696
El Salvador .....	1,018,382	-	12,489	1,030,871	662,737
French West Indies .....	-	-	2,185	2,185	3,841
Guatemala .....	275,000	-	15,879	290,879	307,463
Haiti .....	-	-	110,290	110,290	28,507
Honduras .....	-	-	64,540	64,540	68,091
Jamaica .....	10,222	-	1,677,827	1,688,049	1,322,550
Leeward and Windward Islands ....	-	-	1,052,606	1,052,606	943,428
Netherlands Antilles .....	-	-	152,488	152,488	257,883
Nicaragua .....	-	-	276,851	276,851	489,387
Panama .....	78,400	-	155,395	233,795	418,881
Peru .....	730,614	-	63,876	794,490	576,045
St. Pierre and Miquelon .....	-	-	20,803	20,803	15,709
Surinam .....	-	-	73,648	73,648	66,599
Trinidad .....	-	-	1,466,475	1,466,475	1,279,200
Venezuela .....	7,903,550	-	230	7,903,780	6,678,794
United States:					
Flour in terms of wheat .....	-	-	948,832	948,832	1,306,076
Wheat for domestic use <u>3/</u> .....	1,025,859	-	-	1,025,859	1,169,390
Totals .....	20,435,375	-	14,847,255	35,282,630	19,637,903
Sub-totals, All Countries ....	511,990,462	24,735,056	54,910,150	591,635,668	327,360,697
Bagged Seed wheat <u>4/</u> .....				2,911,963	4,006,521
Totals, All Countries .....	511,990,462	24,735,056	54,910,150	594,547,631	331,367,218

nes - not elsewhere specified.

1/ Overseas clearances as reported by the Statistics Branch, Board of Grain Commissioners for Canada, for all countries except the United States. Excluding bagged seed.

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

3/ Compiled from returns of Canadian elevator licensees and shippers and advice from American grain correspondents.

4/ Adjusted to remove effect of time lag in the returns made by Customs.



Exports of Canadian Wheat 1/ by Destination, October 1964 and 1963

Destination	Wheat (Except Durum)	Durum Wheat	All Wheat	
			October 1964	October 1963 2/
- bushels -				
<u>Western Europe</u>				
<u>EEC</u>				
Belgium and Luxembourg .....	822,232	248,605	1,070,837	3,056,220
France .....	342,305	559,100	901,405	663,335
Germany, Federal Republic .....	1,138,666	627,663	1,766,329	7,512,065
Italy .....	1,218,572	-	1,218,572	458,528
Netherlands .....	151,120	-	151,120	378,767
Sub-totals .....	3,672,895	1,435,368	5,108,263	12,068,915
<u>Other Western Europe</u>				
Austria .....	453,600	225,200	678,800	-
Britain .....	4,438,929	38,080	4,477,009	8,482,924
Denmark .....	-	-	-	20,543
Ireland .....	-	-	-	510,533
Sweden .....	-	11,200	11,200	-
Switzerland .....	78,400	313,850	392,250	1,359,528
Sub-totals .....	4,970,929	588,330	5,559,259	10,373,528
Totals .....	8,643,824	2,023,698	10,667,522	22,442,443
<u>Eastern Europe</u>				
Albania .....	360,267	-	360,267	-
Bulgaria .....	1,292,541	-	1,292,541	-
Czechoslovakia .....	4,974,447	-	4,974,447	1,430,240
Germany, Democratic Republic .....	1,999,971	-	1,999,971	-
Poland .....	3,923,542	-	3,923,542	1,252,720
U.S.S.R. (Russia) .....	-	-	-	25,470,917
Totals .....	12,550,768	-	12,550,768	28,153,877
<u>Africa</u>				
Mozambique .....	-	-	-	24,105
<u>Asia</u>				
China, Communist .....	7,548,193	-	7,548,193	3,094,725
Hong Kong .....	74,667	-	74,667	73,173
India .....	797,067	-	797,067	-
Israel .....	-	-	-	530,208
Japan .....	5,145,817	-	5,145,817	3,106,673
Malaysia .....	70,933	-	70,933	-
Philippines .....	1,300,320	-	1,300,320	-
Saudi Arabia .....	74,784	-	74,784	181,689
Taiwan .....	16,398	-	16,398	-
Totals .....	15,028,179	-	15,028,179	6,986,468
<u>Oceania</u>				
U.S. Oceania .....	-	-	-	54,320
<u>Western Hemisphere</u>				
Cuba .....	-	-	-	520,000
Dominican Republic .....	424,386	-	424,386	193,106
El Salvador .....	150,080	-	150,080	-
Guatemala .....	33,333	-	33,333	-
Jamaica .....	1,199	-	1,199	499
Nicaragua .....	50,960	-	50,960	-
Venezuela .....	1,213,520	-	1,213,520	627,130
United States Domestic 3/ .....	-	-	-	17,834
Totals .....	1,873,478	-	1,873,478	1,358,569
Sub-totals, All Countries ....	38,096,249	2,023,698	40,119,947	59,019,782
Bagged seed 4/ .....			27,404	15,318
Totals, All Countries.....	38,096,249	2,023,698	40,147,351	59,035,100

NOTE: See footnotes on page 19.

Cumulative Exports of Canadian Wheat 1/ by Destination

Destination	August-October 1964			Total
	Wheat (Except Durum)	Durum Wheat	Total Wheat	Same Period Last Year <u>2/</u>
- bushels -				
<u>Western Europe</u>				
<u>EEC</u>				
Belgium and Luxembourg .....	3,261,428	371,735*	3,633,163*	7,688,364
France .....	483,092	964,654*	1,447,746*	2,172,445
Germany, Federal Republic ..	4,803,051*	1,842,348	6,645,399*	14,159,111
Italy .....	2,003,506	-	2,003,506	2,612,979
Netherlands .....	738,373	-	738,373	1,599,230
Sub-totals .....	11,289,450	3,178,737	14,468,187	28,232,129
<u>Other Western Europe</u>				
Austria .....	453,600	225,200	678,800	-
Britain .....	18,749,977*	38,080	18,788,057*	24,014,210
Denmark .....	-	-	-	20,543
Ireland .....	-	-	-	1,638,000
Malta and Gozo .....	-	-	-	281,294
Norway .....	1,601,120	-	1,601,120	1,667,203
Sweden .....	-	11,200	11,200	22,400
Switzerland .....	223,328	735,549	958,877	3,152,839
Sub-totals .....	21,028,025	1,010,029	22,038,054	30,796,489
Totals .....	32,317,475	4,188,766	36,506,241	59,028,618
<u>Eastern Europe</u>				
Albania .....	1,391,283	-	1,391,283	-
Bulgaria .....	1,832,008	-	1,832,008	-
Czechoslovakia .....	15,307,607	-	15,307,607	1,430,240
Germany, Democratic Republic .	5,959,562*	-	5,959,562*	-
Poland .....	9,179,480	3,784,181	12,963,661	7,300,247
U.S.S.R. (Russia) .....	81,547*	-	81,547*	30,548,288
Yugoslavia .....	-	-	-	3,501,866
Totals .....	33,751,487	3,784,181	37,535,668	42,780,641
<u>Africa</u>				
Mozambique .....	-	-	-	64,972
Nigeria .....	70,933*	-	70,933*	96,533
Republic of South Africa .....	944,533	-	944,533	-
Southern Rhodesia .....	48,210	-	48,210	-
Totals .....	1,063,676	-	1,063,676	161,505

Cumulative Exports of Canadian Wheat 1/ by Destination

Destination	August-October 1964			Total
	Wheat (Except Durum)	Durum Wheat	Total Wheat	Same Period Last Year <u>2/</u>
- bushels -				
<u>Asia</u>				
Burma .....	-	-	-	78,931
China, Communist .....	20,873,260	-	20,873,260	6,017,365
Hong Kong .....	253,867	-	253,867	187,599
India .....	3,200,997	-	3,200,997	-
Israel .....	529,200	-	529,200	1,067,248
Japan .....	15,299,860	-	15,299,860	12,776,086
Korea .....	-	-	-	511,467
Malaysia .....	202,720	-	202,720	58,800
Pakistan .....	1,836,800	-	1,836,800	-
Philippines .....	2,006,181	-	2,006,181	2,455,476
Saudi Arabia .....	251,964	-	251,964	622,007
Taiwan .....	240,028	-	240,028	77,781
Totals .....	44,694,877	-	44,694,877	23,852,760
<u>Oceania</u>				
U.S. Oceania .....	38,565	-	38,565	109,349
<u>Western Hemisphere</u>				
Barbados .....	60	-	60	-
Cuba .....	960,245	-	960,245	894,080
Dominican Republic .....	424,386	-	424,386	349,906
Ecuador .....	443,950	-	443,950	312,548
El Salvador .....	150,080	-	150,080	300,533
Guatemala .....	33,333	-	33,333	100,000
Jamaica .....	2,456	-	2,456	2,492
Nicaragua .....	102,293	-	102,293	-
Peru .....	384,533	-	384,533	730,614
Venezuela .....	2,797,201	-	2,797,201	1,971,703
United States Domestic <u>3/</u> .....	-	-	-	185,427
Totals .....	5,298,537	-	5,298,537	4,847,303
Sub-totals, All Countries .	117,164,617	7,972,947	125,137,564	130,780,176
Bagged seed <u>4/</u> .....			215,986	331,982
Totals, All Countries .....	117,164,617	7,972,947	125,353,550	131,112,158

\* Revisions in data for previous months have been taken into account in the August-October cumulative totals.

1/ Overseas clearances as reported by the Statistics Branch, Board of Grain Commissioners for Canada, for all countries except the United States. Excluding bagged seed.

2/ Revised.

3/ Compiled from returns of Canadian elevator licensees and shippers and advice from American grain correspondents.

4/ Compiled from Canadian Customs returns, 1963 adjusted for time lag.



Customs Exports of Canadian Wheat Flour by Countries of Consignment

Destination	July 1964 <u>1/</u>	October 1964 <u>2/</u>	August-October	
			1964 <u>2/</u>	1963 <u>1/</u>
- bushels -				
<u>Western Europe</u>				
<u>E.E.C.</u>				
Belgium and Luxembourg .....	17,671	-	16,861	64,913
Italy .....	-	1,150	1,955	-
Netherlands .....	-	-	-	2,167
Sub-totals .....	17,671	1,150	18,816	67,080
<u>Other Western Europe</u>				
Britain .....	1,092,332	693,740	2,452,720	3,156,828
Denmark .....	460	460	460	920
Gibraltar .....	-	-	-	13,911
Greece .....	2,447	2,190	4,471	3,367
Iceland .....	-	1,610	1,610	1,610
Portugal .....	5,525	2,254	10,840	32,561
Spain .....	-	8,349	8,349	-
Sweden .....	-	-	506	759
Sub-totals .....	1,100,764	708,603	2,478,956	3,209,956
Totals .....	1,118,435	709,753	2,497,772	3,277,036
<u>Eastern Europe</u>				
U.S.S.R. (Russia).....	964,027	-	1,688,718	949,826
<u>Africa</u>				
Angola .....	1,150	46	1,196	460
Cameroun Republic .....	-	230	230	-
British Africa nes .....	-	-	-	6,325
Congo-Leo.....	-	-	28,060	9,775
Ethiopia .....	-	-	230	-
Gambia .....	3,220	-	12,190	-
Ghana .....	25,960	93,032	258,805	194,341
Guinea .....	-	920	920	-
Ivory Coast .....	-	690	690	-
Liberia .....	5,026	6,860	18,586	21,864
Mozambique .....	-	518	8,395	7,760
Nigeria .....	226	253	761	15,532
Nyasaland .....	-	-	3,611	10,389
Portuguese Africa nes .....	6,797	7,344	16,774	23,506
Sierra Leone .....	45,455	51,299	199,046	97,865
Tanganyika .....	-	-	-	4,600
Togo .....	12,282	19,711	46,299	41,126
Totals .....	100,116	180,903	595,793	433,543
<u>Asia</u>				
British Middle East nes .....	2,990	7,084	13,395	9,273
Burma .....	-	159,043	159,043	66,100
Ceylon .....	-	-	-	586,056
Hong Kong .....	63,661	53,643	198,403	270,006
Indonesia .....	37,145	-	-	-
Iran .....	575	-	1,000	1,900
Japan .....	4,830	4,025	14,218	45,791
Jordan .....	110	-	110	356



Customs Exports of Canadian Wheat Flour by Countries of Consignment

Destination	July 1964 <u>1/</u>	October 1964 <u>2/</u>	August-October	
			1964 <u>2/</u>	1963 <u>1/</u>
- bushels -				
<u>Asia (concluded)</u>				
Kuwait .....	2,576	-	8,239	7,873
Lebanon .....	221,536	3,220	13,202	12,556
Malaysia .....	39,422	28,294	128,333	225,455
Philippines .....	-	-	-	5,750
Portuguese Asia .....	-	-	2,024	6,099
Qatar .....	-	-	-	258
Saudi Arabia .....	2,300	2,300	2,818	276
Thailand .....	14,485	49,565	128,013	110,337
Totals .....	389,630	307,174	668,798	1,348,086
<u>Oceania</u>				
Australia .....	-	-	-	28
Fiji .....	-	-	1,472	1,518
French Oceania .....	-	-	356	713
United States Oceania .....	-	-	115	-
Totals .....	-	-	1,943	2,259
<u>Western Hemisphere</u>				
Bahamas .....	17,917	35,293	71,502	87,984
Barbados .....	7,447	12,480	35,862	42,741
Bermuda .....	9,177	7,151	25,470	35,758
British Guiana .....	3,427	2,139	7,848	7,976
British Honduras .....	2,505	4,349	8,554	10,842
Chile .....	-	-	920	3,478
Colombia .....	575	-	-	-
Costa Rica .....	72,680	49,795	203,088	128,662
Cuba .....	1,260,763	344,805	1,133,645	399,687
Dominican Republic .....	3,749	13,984	16,284	11,500
El Salvador .....	-	-	200	4,255
French West Indies .....	230	230	690	575
Guatemala .....	1,152	460	3,910	4,832
Haiti .....	4,830	-	9,660	20,700
Honduras .....	4,301	1,458	8,841	12,834
Jamaica .....	101,497	74,727	365,305	364,196
Leeward and Windward Islands .....	69,423	62,461	227,672	268,865
Netherlands Antilles .....	19,440	19,076	52,649	73,147
Nicaragua .....	-	690	690	203,824
Panama .....	6,537	5,858	26,556	59,810
Peru .....	5,060	2,185	7,418	16,399
St. Pierre and Miquelon .....	2,495	695	5,053	4,423
Surinam .....	3,691	4,865	12,639	18,832
Trinidad .....	74,205	93,656	327,810	430,597
United States .....	31,565	102,757	237,169	222,010
Totals .....	1,702,666	839,114	2,789,435	2,433,927
Totals, All Countries .....	4,274,874	2,036,944	8,242,459	8,444,677

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. Preliminary and unadjusted for time lag. Conversion rate: 2.3 bushels per cwt.

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

Class and Grade	Week Ending			
	November 6	November 13	November 20	November 27
- cents and eighths per bushel -				
<u>Initial Payment to Producers</u>				
1 Northern .....	150	150	150	150
2 Northern .....	146	146	146	146
3 Northern .....	142	142	142	142
4 Northern .....	135	135	135	135
5 Wheat .....	121	121	121	121
6 Wheat .....	117	117	117	117
Feed Wheat .....	113	113	113	113
1 C.W. Garnet .....	135	135	135	135
2 C.W. Garnet .....	130	130	130	130
3 C.W. Garnet .....	125	125	125	125
1 Alberta Red Winter.....	134	134	134	134
2 Alberta Winter .....	129	129	129	129
3 Alberta Winter .....	123	123	123	123
1 C.W. Amber Durum .....	150	150	150	150
2 C.W. Amber Durum .....	146	146	146	146
3 C.W. Amber Durum .....	142	142	142	142
<u>International Wheat Agreement</u>				
<u>and Domestic Sales</u>				
1 Northern .....	204/4	204/3	204/1	204
2 Northern .....	201/4	201/3	201/1	201
3 Northern .....	198/4	198/3	198/1	198
4 Northern .....	192/4	192/3	192/1	192
5 Wheat .....	187/4	187/3	187/1	187
6 Wheat .....	182/4	182/3	182/1	182
Feed Wheat .....	179/4	179/3	179/1	179
1 C.W. Garnet .....	189/4	189/3	189/1	189
2 C.W. Garnet .....	187/4	187/3	187/1	187
3 C.W. Garnet .....	186/4	186/3	186/1	186
1 Alberta Red Winter .....	190/4	190/3	190/1	190
2 Alberta Winter .....	188/4	188/3	188/1	188
3 Alberta Winter .....	187/4	187/3	187/1	187
1 C.W. Amber Durum .....	206/4	206/3	200/1	191
2 C.W. Amber Durum .....	203/4	203/3	197/1	188
3 C.W. Amber Durum .....	198/4	198/3	192/1	183
<u>Export - Class II</u>				
1 Northern .....	204/4	204/3	204/1	204
2 Northern .....	201/4	201/3	201/1	201
3 Northern .....	198/4	198/3	198/1	198
4 Northern .....	192/4	192/3	192/1	192
5 Wheat .....	187/4	187/3	187/1	187
6 Wheat .....	182/4	182/3	182/1	182
Feed Wheat .....	179/4	179/3	179/1	179
1 C.W. Garnet .....	189/4	189/3	189/1	189
2 C.W. Garnet .....	187/4	187/3	187/1	187
3 C.W. Garnet .....	186/4	186/3	186/1	186
1 C.W. Amber Durum .....	206/4	206/3	200/1	191
2 C.W. Amber Durum .....	203/4	203/3	197/1	188
3 C.W. Amber Durum .....	198/4	198/3	192/1	183

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

Class and Grade	Week Ending			
	November 6	November 13	November 20	November 27

- cents and eighths per bushel -

Initial Payment to Producers

1 Northern .....	150	150	150	150
2 Northern .....	146	146	146	146
3 Northern .....	142	142	142	142
4 Northern .....	135	135	135	135
5 Wheat .....	121	121	121	121
6 Wheat .....	117	117	117	117
Feed Wheat .....	113	113	113	113
1 C.W. Garnet .....	135	135	135	135
2 C.W. Garnet .....	130	130	130	130
3 C.W. Garnet .....	125	125	125	125
1 Alberta Red Winter .....	134	134	134	134
2 Alberta Winter .....	129	129	129	129
3 Alberta Winter .....	123	123	123	123
1 C.W. Amber Durum .....	150	150	150	150
2 C.W. Amber Durum .....	146	146	146	146
3 C.W. Amber Durum .....	142	142	142	142

International Wheat Agreement

and Domestic Sales

1 Northern .....	208/6	208/5	208/3	208/2
2 Northern .....	207/6	207/5	207/3	207/2
3 Northern .....	206/2	205/6	205/3	205/2
4 Northern .....	199/2	199/1	198/7	198/6
5 Wheat .....	190/6	190/5	190/3	190/2
6 Wheat .....	188/6	188/5	188/3	188/2
Feed Wheat .....	185/6	185/5	185/3	185/2
1 C.W. Garnet .....	191/6	191/5	191/3	191/2
2 C.W. Garnet .....	190/6	190/5	190/3	190/2
3 C.W. Garnet .....	189/6	189/5	189/3	189/2
1 Alberta Red Winter .....	191/6	191/5	191/3	191/2
2 Alberta Winter .....	190/6	190/5	190/3	190/2
3 Alberta Winter .....	189/6	189/5	189/3	189/2

Export - Class II

1 Northern .....	208/6	208/5	208/3	208/2
2 Northern .....	207/6	207/5	207/3	207/2
3 Northern .....	206/2	205/6	205/3	205/2
4 Northern .....	199/2	199/1	198/7	198/6
5 Wheat .....	190/6	190/5	190/3	190/2
6 Wheat .....	188/6	188/5	188/3	188/2
Feed Wheat .....	185/6	185/5	185/3	185/2
1 C.W. Garnet .....	191/6	191/5	191/3	191/2
2 C.W. Garnet .....	190/6	190/5	190/3	190/2
3 C.W. Garnet .....	189/6	189/5	189/3	189/2
1 Alberta Red Winter .....	191/6	191/5	191/3	191/2
2 Alberta Winter .....	190/6	190/5	190/3	190/2
3 Alberta Winter .....	189/6	189/5	189/3	189/2



CANADIAN FLOUR MILLING SITUATION

Production Wheat flour production by Canadian mills during October 1964 amounted to 3,389,000 hundredweight, relatively unchanged from the September output of 3,373,000 hundredweight, but 27 per cent lower than the October 1963 figure of 4,668,000 hundredweight and 9 per cent less than the ten-year (1954-63) average production for the month of October of 3,718,000 hundredweight. Mills reporting operations during October 1964 had a total rated capacity of 169,000 hundredweight per 24-hour day and on the basis of a 26-day working period 77.0 per cent of this rated capacity was effective.

Wheat milled for flour during October 1964 amounted to 7,609,000 bushels, 1 per cent more than the 7,500,000 bushels milled during the preceding month, but 27 per cent below the 10,423,000 bushels milled during October 1963. Of the wheat milled for flour during October 1964 some 6,647,000 bushels were Western Canadian spring wheat (other than Durum) while the remainder consisted of Ontario winter wheat (644,000 bushels); Durum (236,000 bushels); and all other (81,000 bushels).

Exports According to preliminary Customs returns, exports of Canadian wheat flour during October 1964 amounted to 886,000 hundredweight (some 2,037,000 bushels of wheat equivalent), 4 per cent less than the 2,133,000 bushels exported during the previous month and 42 per cent lower than the adjusted October 1963 exports of 3,520,000 bushels. Flour shipments during the month went to forty-seven countries with exports to Britain amounting to 694,000 bushels of wheat equivalent and accounting for 34 per cent of the October 1964 total. Other principal markets for Canadian wheat flour during the month with shipments in thousands of bushels of wheat equivalent were as follows: Cuba, 345; Burma, 159; United States, 103; Trinidad, 94; Ghana, 93; Jamaica, 75; and Leeward and Windward Islands, 62.

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

Crop Year	Wheat Milled for Flour bushels	Wheat Flour	
		Production	Exports <sup>1/</sup>
		- 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--1959-60 average .....	90,148,211	39,752,589	16,349,156
1960-61 .....	89,731,155	39,914,644	15,513,836
1961-62 .....	88,240,580	39,539,651	13,892,676
1962-63 .....	78,789,332	35,505,220	11,854,458
1963-64 <sup>2/</sup> .....	111,670,577	50,103,569	23,873,978
1964-65 <sup>3/</sup>			
August .....	7,027,526	3,144,719	1,770,810
September .....	7,500,251	3,372,989	927,240
October .....	7,609,236	3,389,458	885,628
Totals .....	22,137,013	9,907,166	3,583,678
Same months 1963-64 <sup>2/</sup> .....	24,854,605	11,130,630	3,671,599

<sup>1/</sup> Based on Customs returns. Exports for the crop years 1945-46--1963-64 revised to remove effect of time lag in the returns made by Customs.

<sup>2/</sup> Revised.

<sup>3/</sup> Subject to revision.

# FARMERS' MARKETINGS OF WHEAT, PRAIRIE PROVINCES

(SPECIFIED PERIODS)

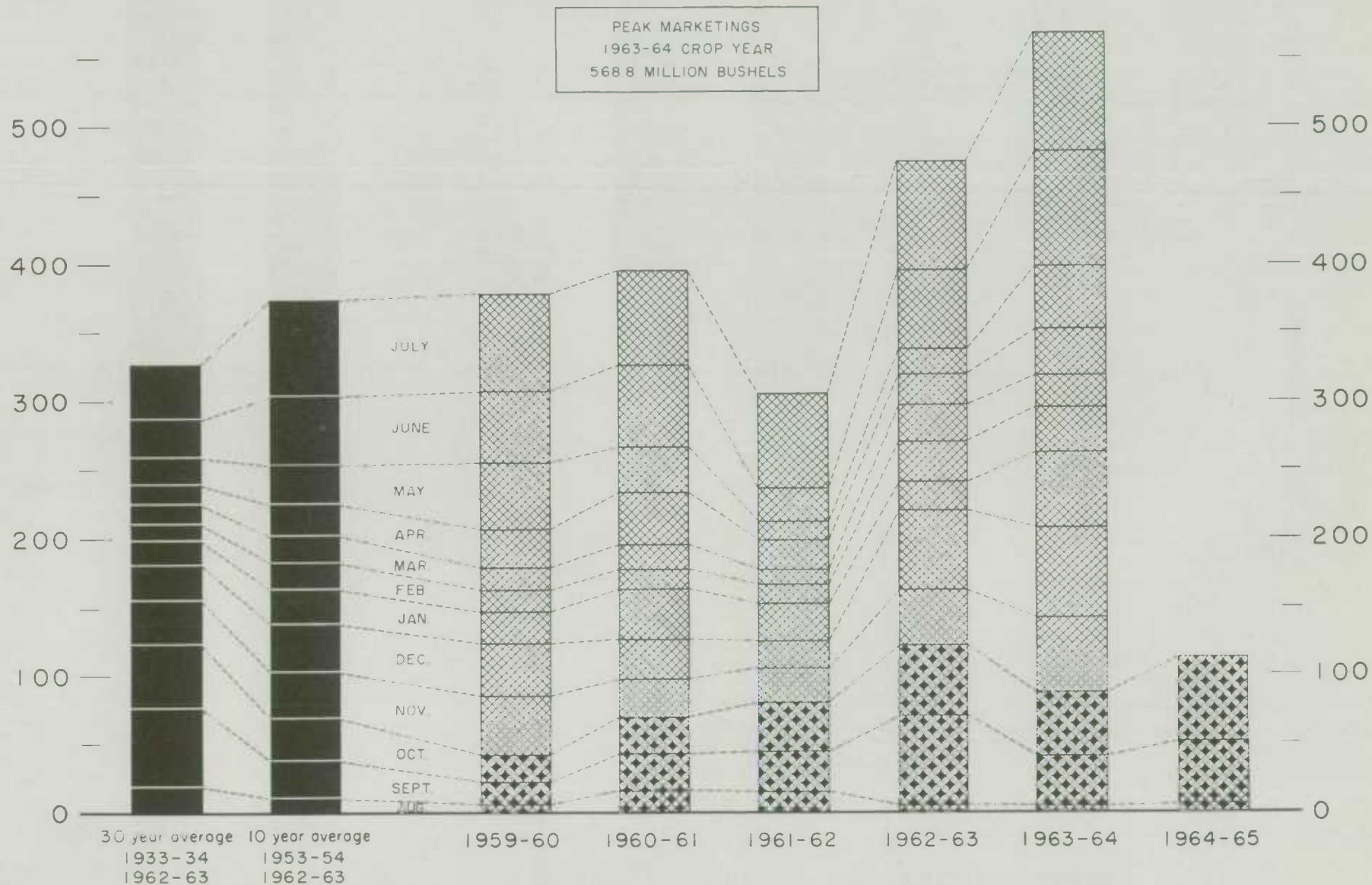
MILLION BUSHELS

600 —

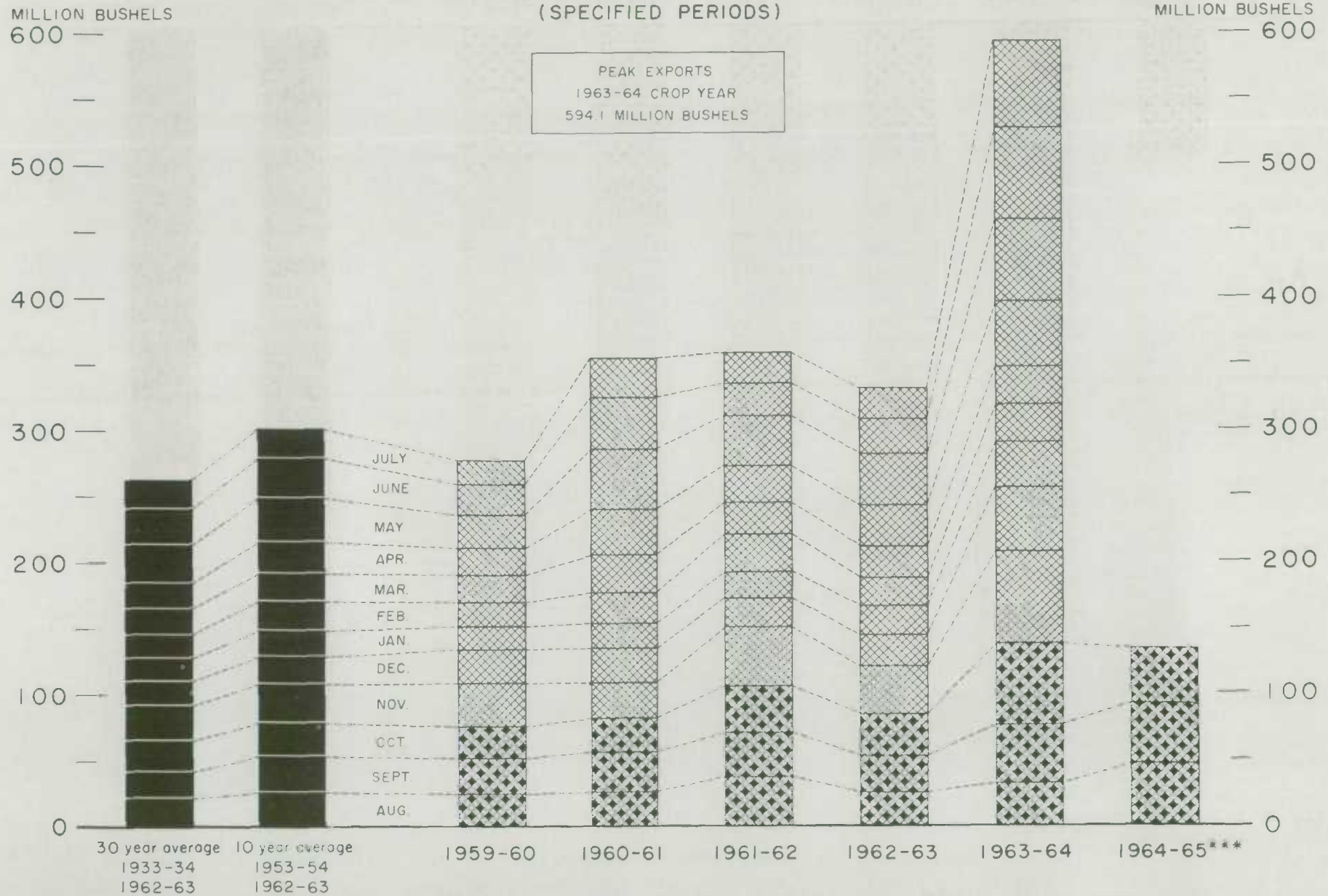
MILLION BUSHELS

— 600

PEAK MARKETINGS  
1963-64 CROP YEAR  
568.8 MILLION BUSHELS



## EXPORTS OF CANADIAN WHEAT\* AND WHEAT FLOUR\*\*



\*Beginning with 1956-57 includes bagged seed wheat.

\*\*In terms of wheat equivalent.

\*\*\*Preliminary.

Agriculture Division D. B. S.



# FARMERS' MARKETINGS OF BARLEY, PRAIRIE PROVINCES

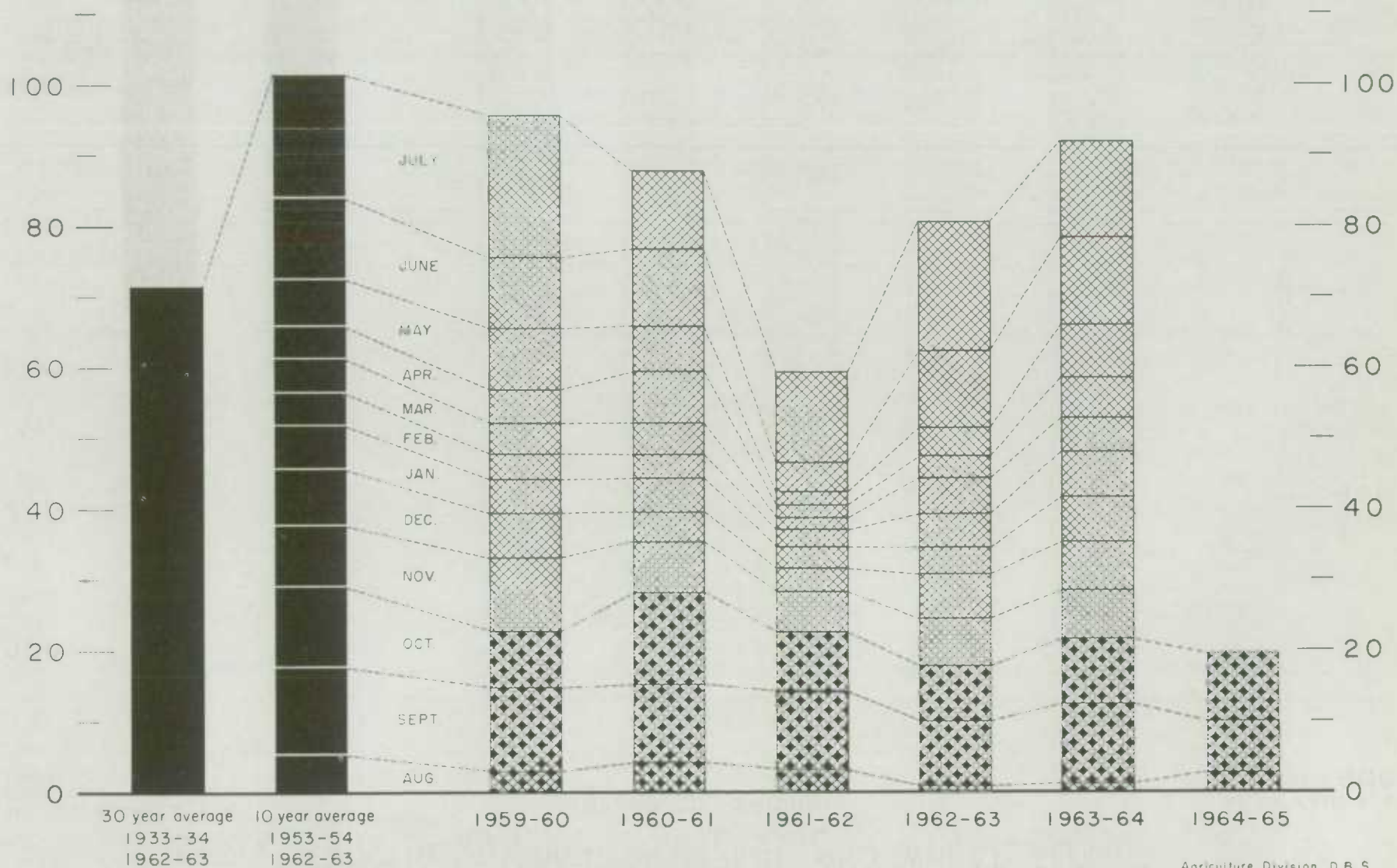
(SPECIFIED PERIODS)

MILLION BUSHELS

120 —

MILLION BUSHELS

120 —

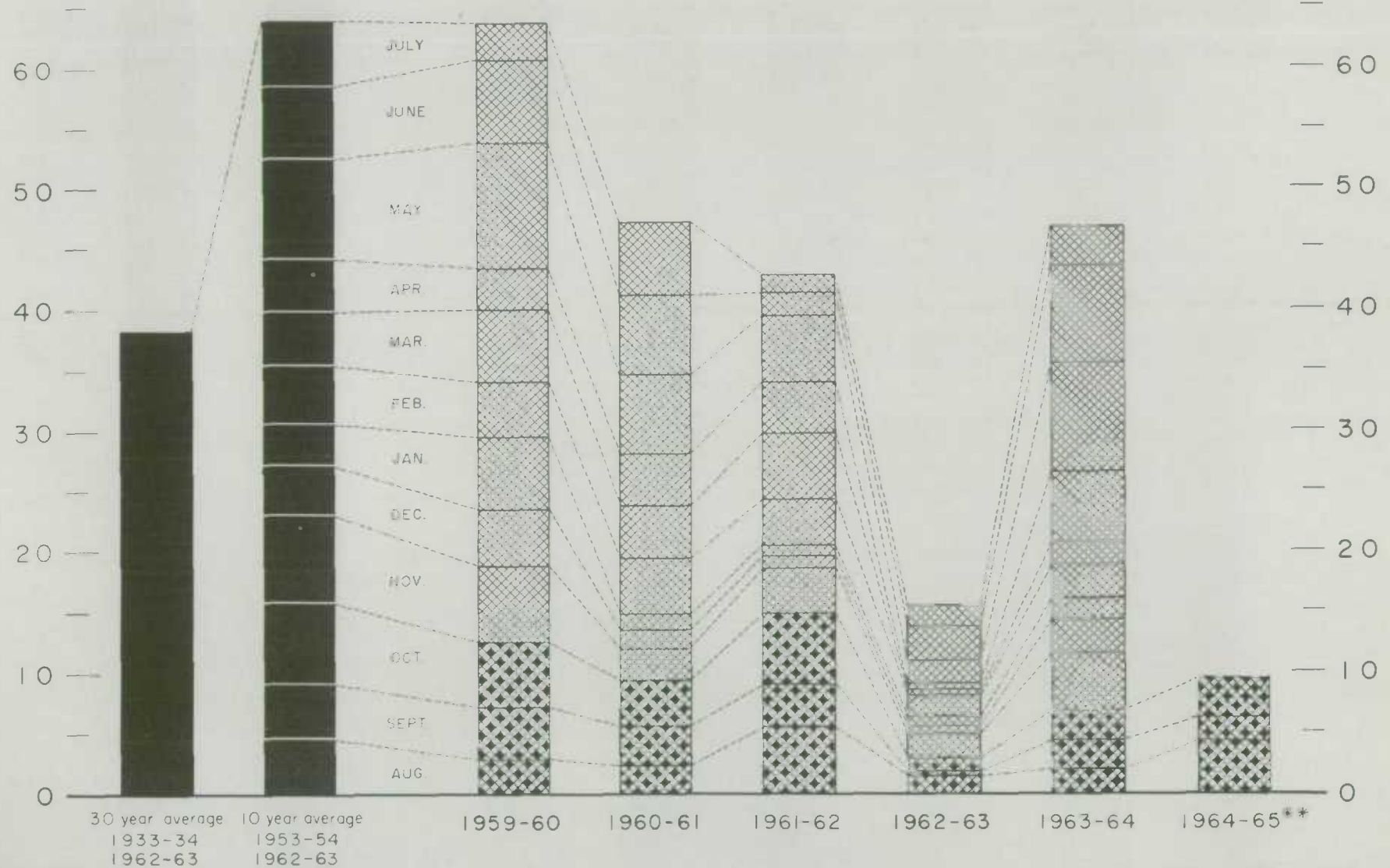


# EXPORTS OF CANADIAN BARLEY AND BARLEY PRODUCTS\*

(SPECIFIED PERIODS)

MILLION BUSHEL  
70 —

MILLION BUSHEL  
— 70



# FARMERS' MARKETINGS OF OATS, PRAIRIE PROVINCES

(SPECIFIED PERIODS)

MILLION BUSHELS

90 —

80 —

70 —

60 —

50 —

40 —

30 —

20 —

10 —

0

MILLION BUSHELS

90 —

80 —

70 —

60 —

50 —

40 —

30 —

20 —

10 —

0

30 year average  
1933-34  
1962-63

10 year average  
1953-54  
1962-63

JULY

JUN.

MAY

APR.

MAR.

FEB.

JAN.

NOV.

OCT.

SEPT.

AUG.

1959-60

1960-61

1961-62

1962-63

1963-64

1964-65



— 30 —



# FARMERS' MARKETINGS OF CANADA'S FIVE MAJOR GRAINS\*, PRAIRIE PROVINCES

MILLION BUSHELS

800 —

700 —

600 —

500 —

400 —

300 —

200 —

100 —

0

(SPECIFIED PERIODS)

MILLION BUSHELS

800 —

700 —

600 —

500 —

400 —

300 —

200 —

100 —

0

30 year average 10 year average  
1933-34 1953-54  
1962-63 1962-63

JULY

JUNE

MAY

APR

MAR

FEB

JAN

DEC

NOV

OCT

SEPT

AUG

1959-60

1960-61

1961-62

1962-63

1963-64

1964-65

\*Wheat, oats, barley, rye and flaxseed

Agriculture Division D.B.S.

# EXPORTS OF CANADA'S FIVE MAJOR GRAINS AND PRODUCTS\*

(SPECIFIED PERIODS)

MILLION BUSHELS

700 —

600 —

500 —

400 —

300 —

200 —

100 —

0

MILLION BUSHELS

700 —

600 —

500 —

400 —

300 —

200 —

100 —

0

30 year average 10 year average  
1933-34 1953-54  
1962-63 1962-63

1959-60

1960-61

1961-62

1962-63

1963-64

1964-65\*\*

JULY

JUNE

MAY

APR.

MAR.

FEB.

JAN.

DEC.

NOV.

OCT.

SEPT.

AUG.

\* Wheat, bagged seed wheat, and wheat flour; oats, bagged seed oats, and oatmeal and rolled oats; barley, malt and pot and pearl; rye and flaxseed  
\*\* Preliminary



UNITED STATES SITUATION

Supply Position Domestic supplies of wheat in the United States for the 1964-65 crop year, at 2,186.9 million bushels, are 6 per cent less than the previous year's total of 2,332.6 million, with a decline in carryover stocks more than offsetting a 13 per cent increase in production. This carryover is the smallest since 1958. In addition, current crop year domestic supplies may be supplemented by imports of about 5 million bushels, composed mostly of wheat for seed and feeding quality wheat. Imports of wheat from Canada during July-October 1964 have amounted to 0.4 million bushels.

Domestic disappearance during 1964-65 is estimated at about 615.0 million bushels, 5 per cent more than the 584.8 million last year. After deducting anticipated domestic requirements for the current United States crop year, some 1,572.3 million remain available for export and for carryover, a decrease of 10 per cent from the 1,748.6 million in 1963-64.

Exports of wheat, wheat flour and other products in terms of grain equivalent during July-October 1964 amounted to 252.9 million bushels, an increase of 2 per cent over the 248.7 million exported during the same months last year. The balance remaining on November 1, 1964 for export and for carryover was estimated at 1,319.4 million bushels compared with 1,499.8 million on the same date a year ago.

United States Wheat Supplies

Item	1963-64 <u>1/</u>	1964-65 <u>2/</u>
	- million bushels -	
Carryover at beginning of crop year (July 1) .....	1,194.9	900.9
Production .....	1,137.6	1,286.0
Total estimated domestic supplies .....	2,332.6	2,186.9
Imports of wheat and wheat flour in terms of wheat for domestic use, July-October .....	0.8	0.4
Total estimated supplies <u>3/</u> .....	2,333.4	2,187.3
Less estimated domestic requirements for crop year <u>4/</u> .....	584.8	615.0
Available for export and for carryover .....	1,748.6	1,572.3
Deduct:		
Exports of wheat as grain, July-October .....	222.2	224.8
Exports of wheat flour in terms of wheat, July- October <u>5/</u> .....	26.6	28.2
Total exports of wheat and wheat flour <u>6/</u> .....	248.7	252.9
Balance on November 1 for export and for carryover .....	1,499.8	1,319.4

1/ Revised. 2/ Preliminary. 3/ Excluding imports for November-June. 4/ Includes shipments to United States Territories and wheat for military food use at home and abroad. 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.

Winter Wheat Growth Slow

According to the November 10, 1964 issue of Crop Production, published by the United States Department of Agriculture, seeding of winter wheat was very active in the major producing States following favourable rains late in September. Most of the fields show good germination and early fields are up to a good stand. Later fields show poor growth and all fields need rain to stimulate rooting and growth before winter sets in. A soil moisture survey in Kansas shows the lowest moisture reserve in eight years. Fields are holding up well despite the dryness as cool weather has lowered the strain on the plants. Little wheat pasture is available in Kansas but some pasturing of early fields where stands permit is reported in Oklahoma and Texas. Late fields need rain and the Panhandle area of both States is very dry. This dry condition stretches northward through eastern Colorado, Wyoming, and Montana. Wheat growers are hoping for general rains soon to provide fall growth and soil cover to prevent wind erosion during the winter season.

In the Corn Belt, seeding of winter grains made good progress. Soil moisture was adequate to germinate most early fields and stands are better than last year. Late fields are spotty and growth has been slow. However, in the southeast seeding of winter grains progressed under favourable conditions following two years when dry soils hampered seeding. In the Pacific areas, wheat made slow progress, but was helped by rains at the end of October and in early November.

Outlook for  
Wheat in 1965

According to a report presented by Mr. William R. Askew at the 42nd Annual Agricultural Outlook Conference.....

Supply Declines Carryover of all wheat on July 1, 1964, totalled 901 million bushels, nearly 300 million below that of a year earlier. This represents the third consecutive decline from the peak 1,411 million carryover reached in July 1961. The continued decline in carryover stocks is the result of special acreage diversion programs for both the 1962 and 1963 crops and the high level of exports that has prevailed in recent years. During the past 4 years, exports have averaged about 720 million bushels per year, or about 245 million above the preceding 4-year period. The estimate for all wheat production, based on the October Crop Report, is 1,286 million bushels, 13 per cent above 1963. The 1964 average yield, indicated at 26.2 bushels per acre on October 1, is the same as the 1960 yield and is exceeded only by the 1958 yield of 27.5 bushels per acre. Total harvested acreage of all wheat this year is estimated at 49 million acres, 8 per cent above last year, but 3 per cent below average. Estimates of carryover and production, plus an allowance of 4 million bushels for imports, provide a total wheat supply for 1964-65 of 2,191 million bushels. This supply is sharply below that of recent years and is about 490 million bushels below the peak supply of 1960-61.

Feeding To Be Prime Factor in Setting Domestic

Disappearance Level Domestic disappearance of wheat in 1964-65 is estimated at about 615 million bushels, somewhat above the 5-year average and substantially above the abnormally low 1963 level, currently computed at 576 million.

Use of wheat for feed in 1964-65 is estimated at about 65 million bushels. This is somewhat above average and accounts for most of the expected increase in domestic disappearance. The amount of wheat fed will depend on the cost relationship between wheat and feed grains. This cost relationship will vary by areas and be affected by the class of livestock to be fed and differences in feeding values of the various grains.



Food Use to Decline      Wheat to be used for food in 1964-65 is estimated at 480 million bushels. This is unusually low but can be explained by events of the past year. Beginning July 1, 1964, mills were required to purchase a 70-cent domestic marketing certificate for each bushel of wheat processed for food, as part of the 1964 Wheat Program. Thus, most mills operated at or above full capacity during the final weeks of the 1963-64 crop year. Wheat ground for flour in June 1964 totalled 62 million bushels, 15 million more than the same month in 1963. This undoubtedly included a much larger proportion of new-crop wheat than usual. The quantity of wheat ground for food dropped to a very low level in July and ran below average during August. These reduced grindings provide the basis for the smaller estimate of wheat to be used for food in 1964-65. Current estimate of wheat used for food is 480 million bushels, about 15 to 25 million below the level of recent years. Decline in the estimated food use is about equal to the additional quantity ground during 1963-64. Thus, it is not expected that human consumption of wheat products during either 1963-64 or 1964-65 is any different from other recent years but only that the usual milling pattern was changed.

Use of wheat for seed is estimated at 70 million bushels, but grower participation in the 1965 Wheat Program, as well as any plans for substitution of acreage, may change this estimate.

Carryover Hovers Around 900 Million      The carryover on July 1, 1965, may be about the same as the 901 million bushels of July 1, 1964. Despite the fact that the 1964 wheat crop is the largest since 1960, disappearance will likely be large enough to utilize current production and prevent an increase in the carryover.

Exports at High Level      Wheat and flour exports in 1964-65 are forecast at 675 million bushels. This is considerably below the record level of 860 million bushels in 1963-64, but still above average. The record export last year resulted from poor crops in Europe and the Soviet Union. These countries, normally either self sufficient or exporters, became importers of wheat. Japan, also suffering from a short crop, imported heavily from the United States. Most of the increased exports were made under commercial terms. This brought about a record dollar export level of 355 million bushels. In 1963-64, about 505 million bushels, including bulgur, were shipped under the Food-for-Peace Program, close to the levels of recent years.

Crop prospects in the Soviet Union and Europe are considerably better than last year and the world wheat crop is expected to set a record. This will not only reduce their import demand, but will give U.S. wheat increased competition for commercial export markets. Japan, an important buyer of U.S. wheat for dollars, expects a much larger crop than its poor 1963 harvest and its import requirements are likely to be smaller.

Prices Average Above Loan      Based on the present supply and demand outlook, the price received by farmers in 1964-65 should be near the national average price support loan rate. About 3/4 of the national acreage allotment is enrolled in the 1964 Wheat Program. All wheat produced on this enrolled allotment is eligible for the loan. Farmers who diverted acreage also received income supplements in the form of marketing certificates in addition to acreage diversion payments. With these supplements, cash receipts from wheat in 1964-65 may be about \$2.1 billion, compared with \$2.3 billion in 1963-64.



United States Wheat  
and Flour Exports  
Continue Upward Trend

United States exported approximately 5 per cent more wheat and wheat flour (grain equivalent) in the first three months of the 1964-65 fiscal year than during the same period of 1963-64. Shipments to all parts of the world amounted to 181 million bushels as compared to 172 million bushels in the previous year. Shipments to countries in the Western Hemisphere showed the largest percentage increase with 23 per cent more wheat and flour going to this particular area. Exports to other parts of the world, except those to Asia, were somewhat less than previously reported. A downward trend can be expected, in Europe, including the Soviet Union, however, as better crops decrease the need for wheat in that area. Exports of wheat and flour to Europe dropped from 21 million bushels during July-September 1963 to under 20 million bushels during July-September 1964. Of the five EEC countries, only Italy took more wheat and flour than before. The only other West European country requiring more U.S. wheat and flour was Portugal which took over 2 million bushels during this July-September period. In the East European area, the 10 million bushels exported to Yugoslavia was more than 8 times as great as exported during July-September 1963. Again, over half of the exports of the aforementioned commodities, or 99 million bushels, went to Asiatic countries. Almost 55 million bushels went to India, 12 million bushels to Japan and another 12 million bushels to Pakistan.

Grain shipments were 4 per cent higher in the first three months of this fiscal year as compared with the same three months of the previous fiscal year. Over 34 per cent or 55 million bushels went to India and 13 per cent or 21 million bushels to Brazil. Flour shipments in the same period increased 11 per cent, from 20 million bushels in the 1963-64 period to 22 million bushels in 1964-65. The largest amount—6 million bushels or 26 per cent—went to the United Arab Republic; another 5 million bushels or 22 per cent was shipped to Korea and Bolivia.

Table A shows exports of wheat and flour by country of destination comparing the July-September 1963 period with July-September 1964. Shipments of wheat to Canada are predominantly for transshipment to other destinations. Table B shows the quantities and destination of wheat inspected for export from Canadian ports and exports from Table A adjusted to a new total which reflects transshipments during July-September 1964 compared with the same period a year earlier. These inspections were approximately two and one-half times less than those of July-September 1963. It is anticipated the United States exports of wheat and flour will reach 253 million bushels by October 31, 1964, as compared with 249 million bushels in the first four months of the 1963-64 fiscal year.

Table A. United States Exports of Wheat and Flour 1/ by Country of Destination  
July-September 1963 and 1964

Destination	July-September 1963			July-September 1964		
	Wheat	Flour <u>2/</u>	Total	Wheat	Flour <u>2/</u>	Total
- thousand bushels -						
<u>Western Hemisphere</u>						
Canada <u>3/</u> .....	12,817	78	12,895	5,972	49	6,021
Mexico .....	-	254	254	10	42	52
British Honduras .....	-	64	64	-	52	52
Canal Zone .....	-	1	1	-	5	5
Costa Rica .....	2	116	118	-	192	192

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July-September 1963 and 1964

Destination	July-September 1963			July-September 1964		
	Wheat	Flour <u>2/</u>	Total	Wheat	Flour <u>2/</u>	Total
- thousand bushels -						
<u>Western Hemisphere (concluded)</u>						
El Salvador .....	289	30	319	214	37	251
Guatemala .....	544	12	556	534	26	560
Honduras .....	146	31	177	178	24	202
Nicaragua .....	63	73	136	173	30	203
Panama, Republic of .....	177	103	280	121	62	183
Bahamas .....	4/	1	1	-	10	10
Barbados .....	20	13	33	9	31	40
Dominican Republic .....	253	31	284	360	46	406
Haiti .....	349	5	354	415	25	440
Jamaica .....	-	109	109	-	318	318
Leeward and Windward Islands .	-	15	15	-	17	17
Netherlands Antilles .....	-	65	65	-	81	81
Trinidad and Tobago .....	2	215	217	-	263	263
Bolivia .....	-	913	913	-	2,409	2,409
Brazil .....	9,223	138	9,361	20,832	224	21,056
British Guiana .....	-	231	231	11	271	282
Chile .....	980	164	1,144	1,721	350	2,071
Colombia .....	1,592	134	1,726	1,863	6	1,869
Ecuador .....	62	2	64	267	5	272
Paraguay .....	155	103	258	-	2	2
Peru .....	776	76	852	909	116	1,025
Surinam .....	-	81	81	-	93	93
Uruguay .....	-	10	10	-	10	10
Venezuela .....	2,516	122	2,638	2,212	71	2,283
Totals .....	29,966	3,190	33,156	35,801	4,867	40,668
<u>Western Europe</u>						
<u>EEC</u>						
Belgium-Luxembourg .....	1,657	10	1,667	124	2	126
France .....	642	-	642	524	1	525
Italy .....	37	935	972	1,807	476	2,283
Netherlands .....	2,817	319	3,136	1,964	200	2,164
West Germany .....	2,069	2	2,071	646	2	648
Sub-totals .....	7,222	1,266	8,488	5,065	681	5,746
<u>Other Western Europe</u>						
Azores .....	-	-	-	232	-	232
Cyprus .....	377	11	388	-	-	-
Denmark .....	-	-	-	-	4/	4/
Finland .....	-	4/	4/	-	-	-
Gibraltar .....	-	-	-	-	3	3
Gozo .....	-	-	-	-	-	-
Greece .....	15	670	685	-	122	122
Iceland .....	3	117	120	2	116	118

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Destination	July-September 1963			July-September 1964		
	Wheat	Flour <u>2/</u>	Total	Wheat	Flour <u>2/</u>	Total
- thousand bushels -						
<u>Other Western Europe (concluded)</u>						
Ireland .....	41	-	41	-	-	-
Malta .....	-	-	-	-	9	9
Norway .....	69	9	78	-	-	-
Portugal .....	-	144	144	2,230	436	2,666
Spain .....	2,916	-	2,916	-	-	-
Sweden .....	75	3	78	-	4	4
Switzerland .....	2,395	-	2,395	86	-	86
Turkey .....	978	14	992	39	22	61
United Kingdom .....	584	21	605	478	67	545
Sub-totals .....	7,453	989	8,442	3,067	779	3,846
<u>Eastern Europe</u>						
Poland .....	2,639	211	2,850	913	15	928
Rumania .....	-	-	-	41	-	41
Yugoslavia .....	931	94	1,025	8,956	31	8,987
Sub-totals .....	3,570	305	3,875	9,910	46	9,956
Totals, Europe .....	18,245	2,560	20,805	18,042	1,506	19,548
<u>Asia</u>						
Aden .....	-	-	-	40	14	54
Afghanistan .....	598	1	599	-	<u>4/</u>	<u>4/</u>
Arabia Peninsula States .....	-	12	12	-	26	26
Bahrein .....	-	79	79	-	88	88
Cambodia .....	-	8	8	-	-	-
Ceylon .....	-	230	230	-	555	555
India .....	37,728	39	37,767	54,771	91	54,862
Indonesia .....	-	436	436	-	2	2
Iran .....	90	153	243	2,654	94	2,748
Iraq .....	-	10	10	-	-	-
Israel .....	2,462	22	2,484	1,863	47	1,910
Jordan .....	436	897	1,333	-	893	893
Kuwait .....	-	233	233	22	198	220
Laos .....	-	43	43	-	8	8
Lebanon .....	-	189	189	-	318	318
Macao .....	-	33	33	-	24	24
Malaysia .....	47	47	94	-	34	34
Pakistan .....	12,758	15	12,773	11,936	50	11,986
Philippines .....	1,846	88	1,934	939	182	1,121
Saudi Arabia .....	-	656	656	60	941	1,001
Thailand .....	-	13	13	-	14	14
Vietnam .....	6	1,015	1,021	81	885	966
Hong Kong .....	60	176	236	19	117	136
Japan .....	19,707	774	20,481	11,847	167	12,014



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July-September 1963 and 1964

Destination	July-September 1963			July-September 1964		
	Wheat	Flour <u>2/</u>	Total	Wheat	Flour <u>2/</u>	Total
- thousand bushels -						
<u>Asia (concluded)</u>						
Korea .....	9,212	260	9,472	4,876	2,538	7,414
Nansei and Nanpo Islands .....	218	108	326	-	172	172
Taiwan .....	3,621	256	3,877	2,123	124	2,247
Totals .....	88,789	5,793	94,582	91,231	7,582	98,813
<u>Africa</u>						
Algeria .....	2,641	379	3,020	1,120	7	1,127
Libya .....	-	1	1	-	1	1
Morocco .....	66	860	926	74	757	831
Sudan .....	748	1,352	2,100	375	735	1,110
Tunisia .....	154	65	219	3	99	102
United Arab Republic .....	8,871	3,500	12,371	10,135	5,870	16,005
Angola .....	309	21	330	471	13	484
Burundi and Rwanda .....	-	-	-	-	3	3
Cameroon, Federal Republic of .....	-	11	11	-	26	26
Canary Islands .....	-	4	4	449	-	449
Congo (Leopoldville) .....	28	2,099	2,127	1	488	489
Gabon .....	-	-	-	-	2	2
Ghana .....	4	19	23	-	33	33
Guinea .....	-	6	6	-	<u>4/</u>	<u>4/</u>
Liberia .....	2	24	26	1	33	34
Madeira Islands .....	92	13	105	275	12	287
Mauritania .....	-	-	-	-	3	3
Nigeria .....	362	10	372	817	9	826
Sierra Leone .....	6	16	22	-	36	36
Senegal .....	-	-	-	<u>4/</u>	15	15
Spanish Africa n.e.c. ....	-	-	-	-	<u>4/</u>	<u>4/</u>
Togo .....	36	19	55	-	-	-
Western Portuguese Africa ....	-	9	9	-	11	11
Ethiopia .....	7	11	18	-	1	1
French Somaliland .....	-	17	17	-	20	20
Kenya .....	-	-	-	-	3	3
Mozambique .....	123	<u>4/</u>	123	-	<u>4/</u>	<u>4/</u>
Somali Republic .....	1	-	1	-	<u>4/</u>	<u>4/</u>
Tanganyika .....	116	26	142	-	-	-
South Africa, Republic of ....	1,077	32	1,109	-	-	-
North Rhodesia, South Rhodesia and Nyasaland .....	11	-	11	23	-	23
Totals .....	14,654	8,494	23,148	13,744	8,177	21,921
<u>Oceania</u>						
Australia .....	-	3	3	-	4	4
British West Pacific Islands .	-	-	-	-	1	1

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July-September 1963 and 1964

Destination	July-September 1963			July-September 1964		
	Wheat	Flour <u>2/</u>	Total	Wheat	Flour <u>2/</u>	Total
- thousand bushels -						
Oceania (concluded)						
New Zealand .....	-	-	-	-	1	1
Trust Territory of the Pacific	-	8	8	-	30	30
Totals .....	-	11	11	-	36	36
Totals, All Countries ...	151,654	20,048	171,702	158,818	22,168	180,986

1/ Data includes shipments for relief or charity. 2/ Grain equivalent. 3/ The bulk of exports to Canada are for transshipment to other destinations - see Table B. 4/ Less than 500 bushels.

Table B. United States Exports of Wheat and Flour as Adjusted for Transshipment  
Through Canadian Ports, July-September 1963 and 1964

Destination	July-September 1963		July-September 1964	
	Wheat inspected for export from Canadian ports	Adjusted totals for listed countries	Wheat inspected for export from Canadian ports	Adjusted totals for listed countries
- thousand bushels -				
EEC				
Belgium-Luxembourg ....	1,987	3,654	-	126
France .....	-	642	-	525
Germany, West .....	115	2,186	78	726
Italy .....	-	972	-	2,283
Netherlands .....	3,655	6,791	-	2,164
Sub-totals .....	5,757	14,245	78	5,824
Brazil .....	108	9,469	-	21,056
United Kingdom .....	417	1,022	329	874
Ireland .....	194	235	28	28
Spain .....	230	3,146	579	579
Portugal .....	331	475	-	2,666
Yugoslavia .....	-	1,025	786	9,773
U.S.S.R. ....	-	-	1,677	1,677
Egypt .....	1,971	14,342	-	16,005
Canary Islands .....	255	259	436	885
Nigeria .....	197	569	-	826
Mozambique .....	413	536	-	-
Totals .....	9,873	45,323	3,913	60,193

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 -	
November 2, 1964 .....	165 1/4 - 172 1/2		November 2, 1964 .....	175 3/4 - 176 3/4	
3 .....	Election Day		3 .....	Election Day	
4 .....	163 1/2 - 177 1/2 1/		4 .....	176 5/8 - 177 5/8	
5 .....	165 3/4 - 168		5 .....	178 1/4 - 179 1/4	
6 .....	163 - 177 1/4 1/		6 .....	178 3/4 - 179 3/4	
9 .....	164 3/4 - 168 3/4		9 .....	178 1/2 - 179 1/2	
10 .....	167 1/2		10 .....	177 1/4 - 179 1/4	
11 .....	165 1/2 - 169		11 .....	177 1/4 - 179 1/4	
12 .....	164 - 173 1/4		12 .....	175 5/8 - 178 5/8	
13 .....	164 - 178 1/4 1/		13 .....	175 1/8 - 178 1/8	
16 .....	165 - 168		16 .....	175 - 177	
17 .....	165 1/2 - 167 1/2		17 .....	174 7/8 - 176 7/8	
18 .....	163 3/4 - 178 1/		18 .....	176 1/8 - 178 1/8	
19 .....	168		19 .....	176 1/4 - 178 1/4	
20 .....	165 3/4 - 178 1/4 1/		20 .....	176 7/8 - 178 7/8	
23 .....	169 - 171 3/4		23 .....	176 7/8 - 178 7/8	
24 .....	167 1/4 - 170		24 .....	177 3/8 - 179 3/8	
25 .....	167 1/4 - 170		25 .....	177 1/4 - 179 1/4	
26 .....	Thanksgiving Day		26 .....	Thanksgiving Day	
27 .....	168 1/2		27 .....	177 - 179	
30 .....	167 3/4 - 170 3/4		30 .....	176 1/4 - 178 1/4	

1/ Nominal.

Chicago Wheat Futures, High Points of Closing

Date	December		March	May	July	September	
	New	Old					
- cents and eighths per bushel -							
November	2, 1964 .....	152	150/7	154/5	155	150/4	152/4
	3 .....			Election Day			
	4 .....	152/3	151/6	154/6	155/1	150/1	152/1
	5 .....	152/7	151/7	155/2	155/3	150/4	152/4
	6 .....	151/4	151	154/2	154/6	150/2	152/2
	9 .....	151/7	151/1	154/5	155/2	151	153
	10 .....	153	152/2	156	156/6	153/6	155/6
	11 .....	153	152/2	155/7	156/5	153/3	155/3
	12 .....	152/5	153	156	157	154	156/1
	13 .....	152	151/2	155/6	157	155/6	156
	16 .....	151/5	150/3	155/3	156/4	152/7	155
	17 .....	151/4	150/3	155/2	156/2	153	155
	18 .....	151/6	151	155/5	156/5	153/1	155/3
	19 .....	151/2	150/7	155	156	151/6	153/6
	20 .....	151/1	150	154/3	155/2	151/4	153/4
	23 .....	152/2	151/6	155/4	156/6	152/2	154/3
	24 .....	151/6	151/2	155/2	156/2	152/4	154/5
	25 .....	151/2	150/6	154/5	155/4	152	154
	26 .....			Thanksgiving Day			
	27 .....	151/4	150/2	154/5	155/4	152	154
	30 .....	151/2	149	154/4	155/3	152/1	154/4



ARGENTINE SITUATION

Supply Position      Estimated total supplies of wheat in the Argentine for the 1963-64 (December-November) crop year amount to 338.2 million bushels, consisting of the December 1, 1963 carryover of 25.9 million and a production of 312.3 million. Indicated supplies for the current Argentine crop year, reflecting a substantial increase in production as well as slightly larger opening stocks are about 54 per cent more than the 1962-63 total of 220.1 million bushels and the largest supplies since the 1954-55 crop year total of 339.4 million. After making an allowance of 128.1 million bushels for anticipated domestic requirements, an estimated 210.1 million are available for export and for carryover in 1963-64, considerably more than double the 92.0 million of the previous year.

Exports of wheat and wheat flour in terms of grain equivalent during December 1963-October 1964 amounted to 115.2 million bushels, 77 per cent greater than the 65.1 million exported during the same months in 1962-63. The balance remaining on November 1, 1964 for export and for carryover was estimated at 94.9 million bushels, in sharp contrast to the November 1, 1963 total of only 26.9 million.

Argentine Wheat Supplies

Item	1962-63 <u>1/</u>	1963-64 <u>2/</u>
	- million bushels -	
Carryover at beginning of crop year (December 1) <u>3/</u> ..	25.4	25.9
Production <u>4/</u> .....	194.8	312.3
Total estimated domestic supplies .....	220.1	338.2
Less estimated domestic requirements for crop year ..	128.2	128.1 <u>1/</u>
Available for export and for carryover .....	92.0	210.1
Deduct:		
Exports of wheat as grain, December-October .....	64.2	114.1
Exports of wheat flour in terms of wheat, December-October .....	0.9	1.1
Total exports of wheat and wheat flour .....	65.1	115.2
Balance on November 1 for export and for carryover ..	26.9	94.9

1/ Revised.      2/ Preliminary.      3/ Includes allowances for farm stocks.  
4/ Official estimates.

The following account of the Argentine situation has been extracted from a report from Mr. H. E. Ryan, Assistant Commercial Secretary (Agriculture), Buenos Aires, under date of November 26, 1964 and is reproduced with the permission of the Trade Commissioner Service, Department of Trade and Commerce. Where possible, conversions to Canadian measures and currency have been made for the convenience of our readers.

Weather  
and Crops

As of the end of October, soil and weather conditions were much improved over the conditions of a few months ago, and the outlook is most promising throughout the Pampas region. With the exception of small areas in the Provinces of La Pampa and Entre Rios, which remained dry, timely rains have benefitted the growing crops and aided in the ploughing of land for the oncoming summer crops. The temperature has remained rather cool and although slight frosts and hailstorms have occurred, they caused no noticeable damage to the growing crops.

Wheat

With the exception of localized areas in the Province of La Pampa, there is a promising outlook for the 1964-65 Argentine wheat crop. In the northern belt, comprising areas of northern Buenos Aires, southern Santa Fe and south-central Cordoba, the harvest time is now very near. The crop has headed well, and Argentina may, for the second consecutive year, experience a bumper harvest. In the southern wheat belt, where grain ripens somewhat later, the crop is growing well and the most advanced lots are heading out at present.

There has been no further acreage estimate from the official release of 5,673,000 hectares (14.0 million acres) published last September. The first official production estimate is predicting an output of 7.6 million metric tons (279.2 million bushels) compared with 8.5 million (312.3 million bushels) the previous year. Unfavourable weather conditions, however, could alter this situation, especially in the southern belt, where crops are still susceptible to severe frosts and storms.

The National Grain Board, as of October 31, 1964 suspended its purchases of old crop wheat and reportedly, the total bought to that date was 4,826,091 metric tons (177,327,000 bushels), including 4,463,142 tons (163,991,000 bushels) of bread wheat and 362,949 tons (13,336,000 bushels) of durum. As of November 1, producers can only sell 1963-64 wheat directly to millers or to exporters.

It is expected that 1963-64 exports will finally total some 3,500,000 metric tons (128,602,000 bushels), practically double the tonnage shipped during the previous year. Brazil continues to be the major purchaser of Argentine wheat, and it is expected that by the end of this year total shipments to that country will have reached the agreement level of one million metric tons (36,743,000 bushels). During October, they purchased a parcel of 100,000 tons (3,674,000 bushels), 60 per cent of which was at U\$S 67.95 and the remainder at U\$S 67.98, both per metric ton (\$1.99 per bushel) f.o.b.

Argentina and Brazil have just signed a new agreement which will replace that signed in December 1961 which covered the following three years, i.e. up to December 1964. The newly signed agreement contemplates a minimum purchase of 1,000,000 tons (36,743,000 bushels) by Brazil during 1965 and equal quantities during 1966 and 1967. The agreement allows for a re-evaluation after July 1965 at which time, if mutually agreeable, the quantities can be increased but only for the remainder of 1965. Thus for 1965 there may be more than a million tons (36,743,000 bushels) shipped but for 1966 and 1967 only a million tons (36,743,000 bushels) are contracted for.

The exact quantities to be shipped as well as the sales price, grade specifications, shipment schedules, etc., will be established every quarter during



the next three years. Exports will be carried out by the National Grain Board which would be authorized to transfer these shipments to private exporting firms under the same terms already established. If during the time of this agreement, Brazil is not able to absorb the above quantities, its government must make this situation known prior to the 31st of January each year.

Actual shipments during the month of October totalled 270,512 metric tons (9,940,000 bushels), the highest since last May. For the first twenty days of November, exports have already reached 204,000 metric tons (7,496,000 bushels). Prices for Continental Europe have averaged U\$S 70.25 per metric ton (\$2.05 per bushel) c.i.f., November-December shipment.

Both the National Grain Board and the grain trade at present estimate that there will be a carryover of wheat in Argentina at the end of the current crop year of some 1,800,000-1,900,000 metric tons (66,138,000-69,812,000 bushels). Of this total, some 1,000,000-1,200,000 tons (36,743,000-44,092,000 bushels) will be in the hands of the Grain Board, with the remainder held mainly by producers in the southern grain belt and, to a lesser extent, by millers. Recently, millers have had to purchase from the Grain Board in order to cover current requirements. This was caused mainly because producers in the northern belt no longer have large quantities of wheat on hand to sell to millers, while those in the southern wheat belt apparently are withholding their stocks at the present time. The millers are also already in the market for the new grain, but the amount of futures transactions which have occurred to date is rather limited as the Grain Board await more definite news as to the oncoming harvest situation. The activities of the Futures Market are overshadowed to a certain extent by the surplus which exists in the country. Sales for new grain are currently being made at U\$S 71.00 per metric ton (\$2.08 per bushel) c.i.f. December shipment to Continental Europe, with the equivalent British prices averaging £26.10.0 to 26.16.0 per metric ton (\$2.16 to \$2.18 per bushel). Some parcels of Candéal-Taganrog were traded at U\$S 73.50 per ton (\$2.15 per bushel).

Prices in the Buenos Aires Futures Market for January-February delivery remain at the same level as the minimum price for the new crop, that is, 780 pesos per 100 kilos (\$1.57 per bushel). The present price in the Cereal Exchange is equal to the old minimum level still in existence of 880 pesos per 100 kilos (\$1.77 per bushel).

In the next few weeks the flow of new wheat will begin into the up-river ports. As practically all of the present stocks are in the southern ports or inland elevators, up-river facilities are almost empty, awaiting the new crop. Thus, storage during the early stages of the next harvest will present few problems. However, when the southern crop begins to move into the storage system, Argentina is again going to experience problems. Southern deliveries will likely occur from January onwards. It has been reported that present storage capacity of the National Grain Board amounts to 923,000 metric tons (33,914,000 bushels) bulk in elevators, and 1,504,000 tons (55,262,000 bushels) in underground silos also located at ports. There is an additional elevator capacity for bagged grain at ports of some 665,000 metric tons (24,434,000 bushels). Elevators and underground silos owned by the Board in the Interior have a capacity of some 1,000,000 metric tons (36,743,000 bushels). Private firms have a total capacity in all positions and all types of some 2,100,000 tons (77,161,000 bushels). Thus, in total, there is storage capacity of one kind or another for slightly over 6,000,000 metric tons (220,460,000 bushels).



Inasmuch as there is little on farm storage presently available in Argentina, the Government has established a policy to promote construction of this type of storage using the extension of credits through the Argentine National Bank as the stimulus.

Argentine Wheat Exports December-September 1962-63 and 1963-64

Destination	1962-63	1963-64
- thousand bushels -		
<u>Western Europe</u>		
<u>EEC</u>		
Belgium .....	4,241	1,530
France .....	2,788	3,808
Germany, Federal Republic .....	1,773	8,799
Italy .....	6,759	4,341
Netherlands.....	4,768	5,838
Sub-totals .....	20,329	24,316
<u>Other Western Europe</u>		
Britain .....	6,472	4,225
Finland .....	147	-
Norway .....	725	262
Portugal .....	821	-
Spain .....	-	14
Sweden .....	53	-
Switzerland .....	368	164
Sub-totals .....	8,586	4,665
Totals .....	28,915	28,981
<u>Eastern Europe</u>		
Czechoslovakia .....	-	982
Germany, Democratic Republic .....	-	1,437
Poland .....	-	415
U.S.S.R. (Russia) .....	-	354
Total .....	-	3,188
<u>Africa</u>		
Algeria .....	1,516	-
Others, North Africa .....	198	-
South Africa .....	-	441
Totals .....	1,714	441
<u>Asia</u>		
China, Communist .....	-	36,514
<u>Western Hemisphere</u>		
Bolivia .....	73	74
Brazil .....	14,376	25,024
Paraguay .....	495	992
Peru .....	9,423	8,368
Uruguay .....	-	252
Venezuela .....	373	373
Totals .....	24,740	35,083
Totals, All Countries .....	55,370	104,207

# AUSTRALIAN SITUATION

Supplies for 1963-64  
Crop Year at Record  
Level

Total estimated supplies of wheat in Australia for the 1963-64 (December-November) crop year are placed at an all-time high of 354.5 million bushels, reflecting an increase in carryover stocks, from 18.2 million at December 1, 1962 to 23.5 million in 1963, combined with the 1963 production of 331.0 million bushels. The 1963 crop represented a record outturn for the second consecutive year. After deducting 80.0 million for anticipated domestic requirements, an estimated 274.5 million are available for export and for carryover in 1963-64, an increase of 9 per cent over the 252.1 million the previous year.

Combined exports of wheat as grain and wheat flour in terms of grain equivalent during the period December 1-October 24 of the current Australian crop year amounted to 237.0 million bushels, 18 per cent more than the 201.5 million exported during the corresponding period of 1962-63. The balance remaining on October 25, 1964 for export and for carryover, at 37.5 million bushels, is 26 per cent below the comparable 1963 total of 50.6 million.

## Australian Wheat Supplies

Item	1962-63 <u>1/</u>	1963-64 <u>2/</u>
	- million bushels -	
Carryover, including flour as wheat, at beginning of crop year (December 1) .....	18.2	23.5
Production .....	307.2	331.0
Total estimated domestic supplies .....	325.4	354.5
Less estimated domestic requirements for crop year .	73.3	80.0 <u>1/</u>
Available for export and for carryover .....	252.1	274.5
Deduct:		
Exports of wheat as grain, December 1-October 24 .	180.2	207.6
Exports of wheat flour in terms of wheat, December 1-October 24 .....	21.3	29.4
Total exports of wheat and wheat flour .....	201.5	237.0
Balance on October 25 for export and for carryover .	50.6	37.5

1/ Revised.      2/ Preliminary.

The following information relative to the Australian situation has been extracted from a report from Mr. D. I. Campbell, Assistant Commercial Secretary for Canada, Canberra, under date of November 19, 1964 and is reproduced with the permission of the Trade Commissioner Service, Department of Trade and Commerce.

Crop Position Late forecasts from New South Wales call for an estimated wheat harvest of 165 million bushels as compared to last year's actual record total of 122 million bushels. While late rains may cause a decline in production in New South Wales, as well as lower quality the estimate has served to boost tentative figures on the prospective harvest to 395 million bushels, a new record.

Marketing Position The Australian Wheat Board recently announced the sale of 1,500,000 tons (56,000,000 bushels) of f.a.q. standard wheat from the 1964-65 harvest to Mainland China. The buyers have the option to purchase 10 per cent more or less of the stipulated quantity. Terms of payment are 10 per cent cash on shipment, 20 per cent in six months, 20 per cent in nine months and the balance in twelve months with an interest charge on the deferred payments. The shipping period for this quantity is from November to June and further sale of a similar quantity is expected from negotiations to be conducted in February, 1965.

First Advance on 1964-65 Wheat Crop According to a press release under date of November 17, the Minister for Primary Industry, Mr. C. F. Adermann, announced that the first advance on wheat delivered to the Australian Wheat Board from the 1964-65 crop will be 11s.0d. (\$1.32) per bushel, less freight, for bulk wheat f.o.r. ports, payable on delivery. This rate is the same as that which applied in the previous seven seasons.

The first advance on bagged wheat will be 4d. (4 cents) a bushel above the bulk rate, as is usual.

Mr. Adermann said that deliveries from the 1964-65 crop will almost certainly eclipse last year's record of 307 million bushels and that the harvest will be above 300 million bushels for the third year in succession. He pointed out that, although the marketing of such a large crop presents obvious difficulties, the new marketing year, which begins on December 1, will be off to a good start with a small carryover from the current season and with a substantial sale already made to China for shipment in 1965.

Exports of Australian Wheat and Wheat Flour in Terms of Wheat  
December 1-October 24, 1963-64 and Corresponding Period 1962-63

Destination	Wheat		Wheat Flour	
	1962-63	1963-64	1962-63	1963-64
- thousand bushels -				
<u>Western Europe</u>				
EEC				
Germany, Federal Republic .....	1,341	7,834	-	-
<u>Other Western Europe</u>				
Britain .....	20,383	19,518	1,908	1,533
Ireland .....	1,962	1,578	-	-
Malta .....	445	842	-	-
Norway .....	3,209	4,162	-	-
Spain .....	1,236	-	-	-
Others .....	-	-	15	1
Sub-totals .....	27,235	26,100	1,923	1,533
Totals .....	28,576	33,934	1,923	1,533



Exports of Australian Wheat and Wheat Flour in Terms of Wheat  
December 1-October 24, 1963-64 and Corresponding Period 1962-63

Destination	Wheat		Wheat Flour	
	1962-63	1963-64	1962-63	1963-64
- thousand bushels -				
<u>Eastern Europe</u>				
Albania .....	2,294	-	-	-
U.S.S.R. (Russia) .....	-	48,541	-	6,634
Others .....	1,714	-	-	-
Totals .....	4,008	48,541	-	6,634
<u>Africa</u>				
Kenya .....	343	25	-	-
Malawi .....	-	-	295	256
Mauritius .....	-	-	513	1,142
Portuguese East Africa .....	-	944	-	-
Rhodesia .....	3,219	2,239	-	-
Zanzibar .....	-	-	178	158
Others .....	17	16	77	67
Totals .....	3,579	3,224	1,063	1,623
<u>Asia</u>				
Aden .....	1,011	1,579	-	-
Aden and Aden I/T .....	-	-	1,198	1,148
Aden and Aden I/T Atta .....	-	-	480	578
Arabian Gulf .....	-	-	181	222
Arabian Gulf Atta .....	-	-	1,062	1,328
Brunei .....	-	-	41	16
Burma .....	876	-	119	-
Ceylon .....	7	15	3,508	5,869
China .....	98,896	70,981	-	-
Formosa .....	96	766	-	-
Hong Kong .....	1,814	2,190	198	102
India .....	5,519	9,437	-	-
Indonesia .....	-	-	362	414
Iran .....	1,025	1,648	-	-
Iraq .....	1,440	3,512	-	-
Japan .....	11,687	17,092	-	-
Korea North .....	4,987	-	-	-
Korea South .....	1,539	-	-	-
Lebanon, Jordan, Syria .....	2,725	3,870	-	-
Pakistan .....	3,890	1,342	-	-
Philippines .....	659	242	706	1,941
Saudi Arabia .....	-	-	371	251
Thailand .....	5	322	711	477
<u>Malaysia</u>				
Malaya .....	365	26	3,131	2,616
Malaya Atta .....	-	-	87	90
Sabah .....	-	-	156	160
Sarawak .....	-	-	235	162
Singapore .....	338	2,352	2,722	1,450
Singapore Atta .....	-	-	12	6

Exports of Australian Wheat and Wheat Flour in Terms of Wheat  
December 1-October 24, 1963-64 and Corresponding Period 1962-63

Destination	Wheat		Wheat Flour	
	1962-63	1963-64	1962-63	1963-64
- thousand bushels -				
<u>Asia (concluded)</u>				
Singapore A/C B.W.O. ....	-	-	36	38
Others .....	552	715	313	73
Totals .....	137,431	116,089	15,629	16,941
<u>Oceania</u>				
New Zealand .....	6,103	5,749	-	-
<u>Western Hemisphere</u>				
Cuba .....	457	-	-	-
Peru .....	-	-	14	7
Totals .....	457	-	14	7
<u>Pacific Area and Sundries</u>				
Pacific Islands .....	49	63	2,209	2,170
Ships' Stores and Sundries .....	-	-	460	492
Totals .....	49	63	2,669	2,662
Totals, All Countries .....	180,200	207,600	21,300	29,400

WHEAT SITUATION IN WEST GERMANY

The following account of the grain situation in West Germany has been extracted from a report supplied by Mr. W. F. Hillhouse, Agricultural Counsellor, Canadian Embassy, Bad Godesberg, Germany, under date of November 20, 1964 and is reproduced with the permission of the Trade Commissioner Service, Department of Trade and Commerce. Where possible, conversions to Canadian measures have been made and rounded for the convenience of our readers.

Weather  
and Crops

The weather for the seeding of fall sown grains has been generally favourable in West Germany. The relatively dry weather in the early fall facilitated seeding and subsequent rains in October and November have brought the soil moisture back to normal in almost all areas. The growth and condition of the plants is said to be generally good.

Preliminary estimates of the area sown to winter grains are complete only for wheat, rye, and barley. It is estimated that in relation to 1963 the area sown to wheat has increased by 1 per cent, that sown to rye has remained the same, and that sown to winter barley has increased by 8 per cent. Preliminary indications from some areas indicate a further substantial increase in the area sown to rapeseed even though the Minister of Agriculture has once more warned the farmers that they cannot assume that they will again receive the support price of DM 660 per ton (\$4.04 per bushel) which they have been paid in recent years.

1964 Grain Production German grain production in 1964, at an estimated 16.55 million metric tons was more than one million tons above the previous record established in 1960, 7.2 per cent above the 1963 production and 15.2 per cent above the average production from 1958 to 1963. The high production was achieved through record or near-record yields of most grains, combined with a very small increase in seeded area, and an exceptionally low winter-kill. The northern half of Germany accounted for more than 80 per cent of the increase in production over 1963, although it has less than half the area sown to grains.

Bread Grains Germany had a record wheat crop of 5.2 million tons (191.2 million bushels) in 1964 and a total production of bread grains at a near-record of 8.99 million tons (333.3 million bushels). The wheat crop was grown on 1,446,500 hectares (3.6 million acres) - 4.7 per cent more than in 1963 and 6.5 per cent greater than the 1958-63 average. The area lost through winter-kill accounted for only 1.5 per cent of the seeded area compared with the long-time average of 6 per cent. Sufficient moisture supplies during the early part of the growing season, and excellent ripening and harvesting weather, more than offset the adverse effects of exceptional hot dry weather during the summer. Harvest results were particularly good in northern Germany which accounted for almost three-quarters of the increase in winter wheat production over 1963 although it produced only one-quarter of the total wheat crop. Yields in Schleswig-Holstein averaged 4.31 tons per hectare (64 bushels per acre) compared with the national average of 3.64 tons per hectare for winter wheat and 3.60 tons per hectare for all wheat (about 54 bushels per acre for each).

Acreage and Production of Bread Grains in West Germany

Grain	Area			Production		
	Average 1958-63	1963	1964	Average 1958-63	1963	1964
	- thousand acres -			- thousand bushels -		
Winter wheat .....	2,942	2,912	3,137	144,438	154,138	169,901
Summer wheat .....	415	501	437	19,033	24,287	21,274
Totals .....	3,357	3,413	3,574	163,471	178,425	191,175
Winter rye .....	3,065	2,737	2,749	120,518	116,366	138,772
Summer rye .....	89	77	82	2,903	2,646	3,307
Totals .....	3,154	2,814	2,831	123,421	119,012	142,079
Bread grains totals .....	6,511	6,227	6,405	286,892	297,437	333,254

Production of rye in 1964, at a near-record of 3,608,800 tons (142.1 million bushels), was 11 per cent above 1963 and 7.4 per cent above the six-year average. It resulted from the outstanding yield of 3.15 tons per hectare (50.2 bu. per acre) since the seeded area was almost unchanged from last year and was 10.2 per cent less than the 1958-63 average. Northern Germany which accounts for almost two thirds of the area sown to rye was responsible for most of the gain, but yields were also better in parts of southern Germany.



#### German Wheat Imports

German imports of wheat fluctuate fairly widely from year to year depending in part on the size and quality of her own crop and, in part, on her success in finding markets for the product of her excess milling capacity. During the past 13 years wheat imports have fluctuated between 1,825,000 tons and 3,479,000 tons (67,057,000 and 127,830,000 bushels). During the five years 1956-57-1960-61 imports averaged about 2.5 million tons (91,858,000 bushels), 37 per cent of which came from Canada. The crop year 1961-62 being the year immediately prior to establishment of Common Market import regulations, was quite typical. Imports rose to 3,479,000 tons (127,830,000 bushels) as a result of stockpiling and Canada's share dropped to 34 per cent. During each of the past two crop years imports have been almost identical at 1,852,000 tons (68,049,000 bushels) in 1962-63 and 1,864,000 tons (68,490,000 bushels) in 1963-64. Canada's share of these smaller imports was higher at 41 and 44 per cent, respectively, but the actual imports of 762,000 tons and 824,000 tons (27,998,000 and 30,276,000 bushels) were well below the 1956-57-1960-61 average of 931,000 tons (34,208,000 bushels). Given the large size and good quality of this year's domestic crop it seems unlikely that imports of wheat into Germany in 1964-65 will reach last year's level. With no large flour contract yet known that could buoy up flour exports, total imports could in fact reach a new low.

During the first two months of this crop year Germany has imported 224,000 tons (8,230,000 bushels) of wheat compared with 192,000 (7,055,000 bushels) during July and August of 1963. Imports from Canada at 122,000 tons (4,483,000 bushels) were up from last year's 113,000 tons (4,152,000 bushels) but represented only 54 per cent of the total compared with 59 per cent last year. France and Sweden have both been more important sources of wheat so far this year, while the actual and relative shipments of the United States have declined.

#### Flour Exports

In recent years Germany has become a major flour exporter. Exports which were less than 300,000 tons in the calendar year 1956 had risen to over 785,000 tons by the crop year 1961-62 - the year before EEC regulations came into effect. In 1962-63 German flour exports declined to 436,000 tons, but recovered last year to 723,000 tons. Almost exactly one half of last year's exports went to Eastern Europe, mostly the U.S.S.R.. German shipments of 290,000 tons to that country alone were responsible for the increase in total exports during 1963-64. China and North Korea which were very heavy buyers two years ago received no German flour during the past year. Great Britain and Ireland on the other hand became very heavy buyers of very low grade feed flour. The importance of Western Europe as a market for German flour has declined since the advent of the EEC regulations. Exports to these markets averaged less than 81,000 tons in the past two years compared with almost 179,000 tons during the previous year.

Flour exports during the first two months of this crop year totalled less than 55,000 tons, down from almost 70,000 tons and 94,000 tons in the comparable periods of 1963-64 and 1962-63, respectively. This year the United Arab Republic and Libya have been outstandingly the most important markets receiving 26,634 tons and 8,325 tons, respectively. No shipments were recorded to Great Britain and Ireland compared with more than 26,000 tons during July and August last year. Exports to the Caribbean area and South America rose, however, from 3,538 to 4,736 tons with Jamaica the major market.

Germany's flour exports are assisted by the EEC Regulation No. 91 which permits the levy-free import of wheat in quantities more than sufficient to produce the amount of flour which has been exported. These flour export rebates are considerably smaller, however, than those permitted by Germany before the advent of the EEC regulations. Furthermore, Germany has not to-date taken advantage of the extra cash subsidies permitted by EEC which now range up to a reported US\$12.00 per ton according to destination.

#### WHEAT SITUATION IN ITALY

The following account of the current wheat situation in Italy has been extracted from a report by Miss M. D. Johnson, Commercial Assistant, Canadian Embassy, Rome, under date of November 12, 1964, and is reproduced with the permission of the Trade Commissioner Service, Department of Trade and Commerce.

##### Wheat

The damage caused by excessive rain at harvesting time has resulted in a less abundant crop than had at first been expected. The most recent official estimates (provisional - released on October 10) are as follows:

<u>Grain</u>	<u>Production</u>	1964 as per cent of 1963
	thousand bushels	per cent
Wheat (except durum).....	262,347	+ 13.8
Durum wheat .....	53,278	- 21.5
Total .....	315,625	+ 5.7

The area sown to wheat, this year, was about 11 million acres, so that the yield per acre has been almost 0.8 metric ton (29 bushels).

Italian annual wheat requirements are reckoned at 9 million metric tons (330,690,000 bushels) comprising 7.5 million tons (275,575,000 bushels) wheat (except durum) and 1.5 million tons (55,115,000 bushels) durum. Since stocks at the beginning of the 1964 crop year totalled about 400,000 metric tons (14,697,000 bushels) - 270,000 (9,921,000 bushels) of wheat (except durum) and 130,000 (4,777,000 bushels) of durum - it would appear that the durum wheat on hand should cover this year's domestic requirements, but about 100,000 metric tons (3,674,000 bushels) of wheat (except durum) would need to be imported. However, the quality of some of this year's Italian crop of durum wheat is not good. The trade is therefore of the opinion that at least 500,000 tons (18,372,000 bushels) - 400,000 tons (14,697,000 bushels) of wheat (except durum) and 100,000 (3,674,000 bushels) of durum will have to be imported.

During the last crop year 480,323 metric tons (17,649,000 bushels) of wheat were imported as against 270,000 tons (9,921,000 bushels) the previous year. About 250,000 tons (9,186,000 bushels) were to replace the wheat used in the production of flour, semolina, bakery products and pasta for export and in respect of which no import levies are payable. During the same period July 1, 1963 to June 30, 1964, 100,000 tons of soft wheat flour 2,000 tons (73,000 bushels) of durum semolina and 20,000 tons of pasta were exported from Italy.



After allowing for the increase in the accumulative carrying charge, beginning August 1, of Lire 500 (2 cents per bushel) for wheat (except durum) and Lire 550 (3 cents per bushel) for durum wheat in respect of both the basic intervention and target prices, these now (November 1964) range as follows:

Intervention prices for

Wheat (except durum)	from	\$2.98 to \$3.18 per bushel
Durum wheat	from	\$3.52 to \$4.10 per bushel

Target prices for

Wheat (except durum)	from	\$3.13 to \$3.42 per bushel
Durum wheat	from	\$3.47 to \$4.29 per bushel

The same increases apply also to threshold prices which, for imports from third countries, are now (November 1964) as follows:

Wheat (except durum)	\$3.39 per bushel
Durum wheat	\$4.55 per bushel

On November 4, levies for import of wheat from third countries amounted to Lire 32,281 per metric ton (\$1.51 per bushel) for wheat (except durum) and Lire 49,513 per ton (\$2.32 per bushel) for durum wheat. The supplementary levy for hard and semi-hard wheats (including Manitobas 1, 2 and 3) was, on the same date, Lire 13,950 (65 cents per bushel), bringing the total levy for these wheats to Lire 46,231 per metric ton (\$2.16 per bushel).

The open market prices (Milan) for domestic wheat have reached levels somewhat above the established target prices and ranged (at the beginning of November 1964) from Lire 67,000 to 74,000 per metric ton (\$3.13 to \$3.46 per bushel) for wheat (except durum) and Lire 91,000 to 94,000 (\$4.26 to \$4.40 per bushel) for durum. Prices per metric ton of imported wheat on the same market ranged, also at the beginning of November, from Lire 97,000 to 98,000 (\$4.54 to \$4.58 per bushel) for Manitobas and from Lire 92,000 to 93,000 (\$4.30 to \$4.35 per bushel) for Plate (Argentina).

According to the latest estimates, wheat held by intervention organizations and other Government agencies amounts to 777,000 metric tons (28,550,000 bushels) wheat (except durum) and 175,000 (6,430,000 bushels) durum. Sales to millers at target prices from these stocks have not started, all purchases having so far been made on the open market.

With respect to possibilities for Canadian wheat, it is the opinion of the trade that no large sales will be made to Italy this year, but that parcels of wheat and perhaps an occasional cargo of both durum and Manitoba will continue to come in, as in recent years, especially to replace wheat used in the production of flour, semolina, bakery products and pasta exported and for which, as stated above, no levies are chargeable.



# CROP SITUATION IN BRITAIN

The following account of the current crop situation in Britain has been extracted from a report received from Mr. G. E. Woollam, Agricultural Counsellor for Canada, London, under date of November 25, 1964 and is reproduced with the permission of the Trade Commissioner Service, Department of Trade and Commerce. Where possible, conversions to Canadian measures have been made for the convenience of our readers.

## 1964 Production

Following a harvest during which near-perfect weather conditions prevailed, grain went into store in a good dry condition. The quality of the grain was generally excellent although some samples were found to contain a fairly high proportion of small and shrivelled kernels. Revised estimates of increased yields compared with 1963 are again reported by the Ministry of Agriculture and indicate a total wheat production in England and Wales of 126.9 million bushels, 295.3 million bushels of barley and 44.1 million bushels of oats.

## Market Information on Cereals

The Ministry of Agriculture have issued their first statistical statement for the new cereal season giving current estimates of United Kingdom requirements for 1964-65, quantities available from domestic production, and the balance which may have to be imported. The figures represent provisional forecasts and the Ministry emphasize that caution must be exercised in using them.

## Wheat Requirements and Supplies in Britain

Item	1963-64	1964-65 Provisional Forecast
- million bushels -		
<u>Requirements</u>		
Human consumption <u>1/</u> .....	204.2	205.3
Animal feed .....	67.6	78.4
Export industrial, seed and other uses .....	9.0	7.5
Totals <u>2/</u> .....	280.7	291.2
<u>Supplies</u>		
Estimates of quantity available from home sources (includes stocks unsold on farms) ...	112.0	138.1
Estimate of imports .....	169.5 <u>3/</u>	153.1
Totals <u>3/</u> July-June .....	281.5	291.2

- 1/ Includes imported flour converted to wheat at 72 per cent extraction rate. Also includes approximately 1.4 million long tons of wheat offals available for animal feed. 2/ Variations in totals due to withdrawals from or additions to stocks. 3/ Normally about 200 - 250 thousand long tons of imported wheat are used for animal feed.

It is estimated that 20.8 million tons of cereals (wheat, flour in wheat equivalent and coarse grains including corn) will be required for consumption during the 1964-65 June-July crop year. This anticipated demand consists of 7.8 million tons (291.2 million bushels) of wheat and flour and 13.0 million tons of coarse grains with imports included in each case. The figures for last crop year were 7.52 million tons (280.7 million bushels) for wheat and flour

and 12.46 for coarse grains. Requirements for human consumption are estimated to be about the same as last year and feed uses represent the anticipated increase.

The quantity available from domestic supplies is greater than last year following the good harvest, 3.7 million tons (138.1 million bushels) of wheat are available compared with 3.0 million (112.0 million bushels) and 8.9 million tons of coarse grains compared with 8.18 million last season. Following the harvest of high yields of grain taken off in good condition it is expected that the use of domestic wheat for milling will be higher than in recent years. Also the normal import of 200 to 250 thousand tons (7 million to 9 million bushels) of feeding wheat may not be required and consequently estimates of imports for the 1964-65 crop year are reduced by 440 thousand tons (16.4 million bushels) to 4.1 million tons (153.1 million bushels). Estimated imports of coarse grains are also less at 4.26 million tons

#### Levy Rates

On October 14, 1964 the Ministry of Agriculture introduced a current rate of general levy for rolled flaked, crushed or bruised wheat of 40/- (\$6.04) per long ton and this was subsequently increased to 60/- (\$9.06) per long ton with effect from October 29, 1964. An increase in the prospective rate of general levy for wheat of this category to 70/- (\$10.57) has currently been announced and will apply to November-January shipments.

#### Grain Markets

The grain market is currently firm and due to limited supplies millers have raised their offers for soft milling wheat to £23 (\$69.46) per long ton for December deliveries. Imported French wheats are offered at £23 7s. 6d. (\$70.59) per long ton cif (equivalent to £21 10 (\$64.93) ex farm. Indications are that prices are reaching a ceiling and growers who have been reluctant to sell at low prices should now be prepared to offer part of their crop to maintain adequate supplies.

### WHEAT SITUATION IN JAPAN

The following account of the wheat situation in Japan has been extracted from a report from Mr. P. A. Savard, Commercial Counsellor, Canadian Embassy, Tokyo, under date of November 25, 1964 and is reproduced with the permission of the Trade Commissioner Service, Department of Trade and Commerce. Where possible, conversions to Canadian measures have been made for the convenience of our readers.

#### Growing Conditions and Domestic Production

This year's crop, at 1,245 thousand metric tons (45.7 million bushels) a substantial improvement over 1963, was still well below the three-year average of 1,650 thousand metric tons (60.6 million bushels) for 1960 to 1962. To a large extent this was due to heavy rains during the late growing season and during harvesting. In part, it was also due to a smaller acreage sown to wheat, with 508,000 hectares (1.3 million acres) were planted this year.

#### Estimated Import Requirements and Volume of Imports

Import requirements for fiscal year 1964 (April 1964-March 1965) have been estimated by the Food Agency at 3,192 thousand metric tons (117.3 million bushels) of which 888 thousand tons (32.6 million bushels) will be feed wheat.

For the last half of the 1964 fiscal year, the Food Agency wheat import requirements are given as follows:

thousand bushels		thousand bushels	
Western white .....	11,758	Hard winter and/or .....	9,112
		Manitoba No. 4	
Hard winter .....	6,981	Australian F A Q .....	7,128
(Protein 11.5%)			
Manitoba No. 2/3 ...	25,573	Wheat for use in grain ...	514
	<hr/>		<hr/>
	44,312		16,755
	<hr/>		<hr/>
			61,067
			<hr/>

Wheat imports since 1960 have been as follows:

	<u>Total</u>	<u>Feed</u>
	- thousand bushels -	
1960 .....	96,561	18,225
1961 .....	94,724	26,271
1962 .....	88,845	26,565
1963 .....	123,421	31,452

#### Factors Bearing on Imports

Main Suppliers The main suppliers are Canada, the United States and Australia, with Canadian hard wheat imports taking substantially the larger share of the bread grains, and the United States and Australia providing a good share of the feed wheat.

Local Marketing Arrangements and Price Supports The Government, under the Staple Food Control Law, undertakes to buy at periodically established prices, any wheat offered by the producers. The Government buying price for this year's crop was set at Y2,702 per 60 kilos or approximately \$3.66 per bushel (Canadian).

The Government is the sole distributor of imported wheat which together with domestic wheat is sold to the mills at Y1,971 per 60 kilos or \$2.67 per bushel (Canadian).

The financial handling of this operation is done through the Food Control Special Account.



continued from page 2

the maximum nor were any special measures needed within the Agreement to assure supplies to importing countries".

The Council also took the opportunity provided by its annual review to reflect upon the current climate of opinion on the role of commodity agreements. In this context it included the following comment:

"Thinking on this question had become more advanced and more liberal and it was important that this mood of optimism should not be lost. The Council welcomed these signs of a fresh approach to commodity arrangements, and drawing upon its own experience in the administration of the International Wheat Agreement over the past fifteen years emphasized the benefits which have accrued from the continuing association of member governments in the frank exchange of views and consultation on wheat problems, and the steady growth of a sense of mutual confidence and understanding which the existence of the Agreement and its institutions have encouraged".

Prolongation of the 1962 International Wheat Agreement Following its decision at its Thirty-ninth Session in June last to recommend to member Governments that the Agreement, which expires on 31st July 1965, should be extended in its present form without amendment for a short-term the Council discussed a draft Protocol to give effect to this decision. It will conclude its discussion of this matter at a further meeting in February 1965.

#### CALENDAR OF WHEAT EVENTS

- November 13 According to a report received from Mr. M.B. Bursey, Commercial Counsellor for Canada, Buenos Aires a new wheat agreement has just been signed between Argentina and Brazil covering the three years up to December 1967. The newly signed agreement contemplates a minimum purchase of one million tons (36.7 million bushels) by Brazil during 1965 and equal quantities during 1966 and 1967.
- 19 According to a report received from Mr. D.I. Campbell, Assistant Commercial Secretary, Canberra, tentative estimates of the 1964-65 wheat harvest in Australia place the crop at a new record of 395 million bushels.
- 20 According to a report received from Mr. W.F. Hillhouse, Agricultural Counsellor, Canadian Embassy, Bad Godesberg, Germany, the Federal Republic of Germany had a record wheat crop of 5.2 million tons, (191.2 million bushels) in 1964.
- 25 According to a report received from Mr. P.A. Savard, Commercial Counsellor, Canadian Embassy, Tokyo, the 1964 wheat crop in Japan is estimated at 1,245 thousand metric tons (45.7 million bushels), representing a substantial improvement over the 1963 production, but still well below the 1960-62 average of 1,650 thousand tons (60.6 million bushels).
- 26 According to a report received from Mr. M.B. Bursey, Commercial Counsellor for Canada, Buenos Aires, the first official estimate of production places the 1964-65 wheat crop in Argentina at 7.6 million metric tons (279.2 million bushels).
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