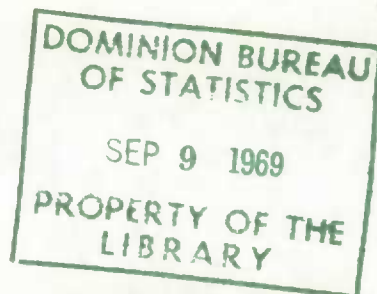


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The Wheat Review

JULY 1969



DOMINION BUREAU OF STATISTICS

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DOMINION BUREAU OF STATISTICS

Agriculture Division

Crops Section

THE WHEAT REVIEW

JULY 1969

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WORLD WHEAT SITUATION

World Wheat Exports Total exports of wheat and wheat flour in terms of wheat
Lowest Since from the four traditional major exporters during the August-
1959-60 June period of the current crop year have amounted to 1,053.6
million bushels, a decrease of 18 per cent from the 1,291.5
million bushels exported during the same eleven months in 1967-68, and 16 per cent
below the ten-year (1957-58 - 1966-67) average shipments for the period of some
1,248.8 million bushels. As indicated in the accompanying table, based on the
Canadian crop year, exports from Argentina were at a higher level this year than last
while those from United States, Canada and Australia were lower.

Exports of Wheat and Flour in Terms of Wheat, August 1968 - June 1969 with Comparisons

August - June	United States	Canada	Argentina	Australia	Total
million bushels					
1950-51	346.4	209.1	87.5	119.7	762.7
1951-52	446.1	312.9	24.1	86.4	869.5
1952-53	296.7	341.4	29.3	94.8	762.2
1953-54	190.7	234.3	101.2	57.0	583.2
1954-55	253.2	231.9	123.0	88.6	696.7
1955-56	317.8	284.1	103.3	96.3	801.5
1956-57	507.2	241.9	93.2	115.6	957.9
1957-58	370.0	294.6	70.2	57.2	792.0
1958-59	416.3	274.7	95.7	71.5	858.2
1959-60	470.1	259.7	67.5	103.9	901.2
1960-61	618.4	324.4	60.7	170.2	1,173.7
1961-62	659.2	336.2	85.2	206.2	1,286.8
1962-63	593.6	308.6	56.9	163.6	1,122.7
1963-64	794.4	529.2	99.4	259.8	1,682.8
1964-65	665.5	372.3	150.7	225.2	1,413.7
1965-66	798.0	519.5	265.4	179.8	1,762.7
1966-67	672.6	479.3	98.9	243.5	1,494.3
1967-68 ^r	703.2	292.1	62.3	233.9	1,291.5
1968-69 ^p	493.1	276.4	93.1	191.0	1,053.6

p Preliminary figures.

r Revised figures.

Wheat Supplies of Supplies of wheat held by the four traditional major exporters
Four Major Exporters for export and for carryover, at July 1, 1969 amounted
Above a Year Ago to 2,108.0 million bushels compared with 1,449.5 million at
July 1, 1968. Supplies were larger in United States, Canada
and Australia while those in Argentina were smaller. Supplies at July 1, 1969, in
millions of bushels, were held as follows, with last year's comparable figures in
brackets: United States, 810.6 (539.4); Canada, 874.0 (709.4); Argentina, 44.9
(70.9); and Australia, 378.5 (129.8).

CANADIAN SITUATION

Supplies Higher than a Year Ago

Total estimated supplies of wheat for the 1968-69 (August-July crop year) are placed at 1,315.4 million bushels consisting of the August 1 carryover of 665.5 million and the 1968 crop, estimated at 649.8 million bushels. Supplies of the size indicated represent an increase of 12 per cent over the 1,169.7 million of 1967-68. After making an allowance of 165.0 million bushels for anticipated domestic requirements, supplies available for export and for carryover during 1968-69 amount to 1,150.4 million bushels, 15 per cent more than the 1,001.5 million in 1967-68.

August-June Exports Decline

Exports of wheat and flour in terms of wheat equivalent amounted to 276.4 million bushels during August-June of the current crop year, 5 per cent less than the previous year's corresponding total of 292.1 million and below the ten-year (1957-58 - 1966-67) average for the period of 232.6 million bushels. This year's exports consisted of 254.0 million bushels of wheat in bulk, 568 thousand of seed and 21.7 million of flour in terms of wheat. During the comparable period last year these figures were 268.7 million of wheat in bulk, 634 thousand of seed and 22.8 million of flour in wheat equivalent. The balance remaining on July 1, 1969 for export and for carryover amounted to 874.0 million bushels, 23 per cent above the July 1, 1968 total of 709.4 million.

Canadian Wheat Supplies

Item	1967-68 ^r	1968-69 ^p
	million bushels	
Carryover in North America at beginning of crop year (August 1)	576.8	665.5
Production	592.9	649.8
Total estimated supplies	1,169.7	1,315.4
Less estimated domestic requirements for crop year	168.2	165.0
Available for export and for carryover	1,001.5	1,150.4
<u>Deduct</u>		
Exports of wheat in bulk, August-June(1)	268.7	254.0
Exports of seed wheat, August-June(2)	0.6	0.6
Total exports of wheat as grain	269.3	254.6
Exports of wheat flour in terms of wheat, August - June(2)	22.8	21.7
Total exports of wheat and wheat flour	292.1	276.4
Balance on July 1 for export and for carryover	709.4	874.0

(1) As reported by the Board of Grain Commissioners.

(2) Customs returns, 1967-68 adjusted for time lag.

^p Preliminary figures.

^r Revised figures.

Marketings, Disappearance
and Visible Supplies

Total primary deliveries of wheat (both east and west) up to July 23 of the current crop year have amounted to 380.6 million bushels in contrast to the 438.9

million marketed during the same period of the previous year. Some 66.5 million bushels of this year's total were delivered during the five weeks June 19 to July 23, 1969. During the same period the volume of Canadian wheat entering domestic and export channels amounted to 41.5 million bushels. As a result, the total visible supply of Canadian wheat increased from 417.6 million at June 18 to a level of 442.2 million at July 23, 1969.

The total visible supply of Canadian wheat at July 23 this year represented increases of 4 per cent and 27 per cent, respectively, over their comparable levels of 426.8 million bushels in 1968 and the 347.4 million in 1967. Country elevator stocks, amounting to 265.8 million bushels, were slightly more than the 1968 comparable total of 246.1 million and considerably above the 1967 figure of 184.4 million. Wheat stocks at interior terminals, at July 23, 1969 totalled 10.8 million bushels, compared with the 13.7 million of the previous year and the 1967 total of 13.5 million. Wheat stocks "in transit rail" (western division) amounted to 20.0 million bushels, 8 per cent above the 18.5 million of a year ago and 2 per cent more than the 19.6 million of two years ago. Supplies at the Canadian Lakehead, totalling some 49.5 million bushels, were lower than the 63.0 million at July 24, 1968 but higher than the 43.4 million at July 26, 1967. The 2.0 million bushels "in transit lake" at July 23, 1969 were in sharp contrast to the comparable 12.4 million of 1968 and lower than the 3.5 million of 1967. The 32.6 million bushels in Bay, Lake and Upper St. Lawrence ports, were higher than both the 28.5 million of the previous year and the 31.5 million of two years ago. Supplies in Lower St. Lawrence and Maritime ports this year, at 38.0 million bushels, registered increases over both the 22.6 million of 1968 and the 30.0 million of 1967. The 13.4 million bushels in West Coast ports (Vancouver-New Westminster, Prince Rupert and Victoria) were also above both the 11.7 million of the previous year and the 10.1 million in this position two years ago.

June 1969 Exports of
Wheat and Flour Total
26.1 Million Bushels

Combined exports of wheat in bulk, seed wheat and wheat flour in terms of grain equivalent, amounted to 26.1 million bushels during June 1969. This volume was 19 per cent below last month's total of 32.1 million, 38 per cent

less than the 42.1 million of June 1968 and 34 per cent smaller than the ten-year (1958-67) average for the month of June of 39.3 million. Exports of wheat in bulk (as reported by the Board of Grain Commissioners) during June 1969 totalled 24.0 million bushels, below the May 1969 total of 30.4 million, the June 1968 figure of 40.8 million and the ten-year average figure of 36.3 million. Based on Canadian Customs returns, the equivalent of 2.0 million bushels of wheat was exported in the form of flour during June 1969. Increases were registered over the previous month's figure of 1.6 million bushels and the adjusted June 1968 total of 1.3 million but declined from the ten-year average of 3.0 million.

Cumulative exports of wheat in bulk during the August-June period of the current crop year amounted to 254.0 million bushels, representing decreases from the 1967-68 comparable figure of 268.7 million, and the ten-year average for the period of 332.6 million. This year's shipments of wheat to the People's Republic of China and Britain, the two leading markets for Canadian wheat in bulk form, totalled 71.8 million and 52.4 million bushels and accounted for 28 per cent and 21 per cent, respectively, of the August-June total. During the same period last year the People's Republic of China accounted for 17 per cent and Britain 22 per cent of the eleven-month total. Other principal markets for Canadian wheat in bulk during the first eleven months of the current crop year, with figures for the same period of the

preceding crop year in brackets, were as follows, in millions of bushels: Japan, 40.0 (35.1); India, 15.3 (11.0); Federal Republic of Germany, 11.8 (16.1); Italy, 11.0 (7.6); Belgium and Luxembourg, 6.4 (8.8); Netherlands, 5.5 (4.8); Switzerland, 5.2 (2.5); and France, 4.3 (0.5).

Cumulative exports of seed wheat during August-June of the current crop year, based on Canadian Customs returns, amounted to 568 thousand bushels compared with last year's corresponding total (adjusted to remove time lag) of 634 thousand.

Cumulative exports of wheat flour during the first eleven months of the 1968-69 crop year, based on Customs returns, were the equivalent of 21.7 million bushels, and registered decreases from both the August-June 1967-68 figure and the 10-year average. The major market for wheat flour during the period under review was Cuba with purchases amounting to 10.2 million bushels and accounted for 47 per cent of the first eleven-month total. During the comparable period of 1967-68 shipments to Cuba amounted to 10.7 million and also accounted for 47 per cent of the total. Other principal markets for Canadian wheat flour in terms of grain equivalent during the August-June period of the 1968-69 crop year, with revised data for the same months of the preceding crop year in brackets, were as follows, in thousands of bushels: Britain, 2,294 (2,652); Ghana, 1,250 (1,424); Ceylon, 855 (860); Leeward and Windward Islands, 785 (752); U.A.R. Egypt, 767 (37); Indonesia, 619 (nil); Trinidad and Tobago, 519 (363); United States, 431 (534); and Lebanon, 427 (196).

Notes on Canadian
Grain Situation
August 1, 1969

The Honourable Jean-Luc Pepin, Minister of Industry, Trade and Commerce, and the Honourable H.C. Olson, Minister of Agriculture, issued a joint statement on the Canadian grain situation, August 1, 1969.

Review. — The Government of Canada has completed a thorough review of the grain situation and its implications for the prairie grain economy.

There has been a dramatic turn-around in the world wheat economy. For the past three seasons the world has harvested bumper crops. This is true not only for most of the countries which normally export but also for the majority of countries which normally import. Stocks have increased and there has been difficulty in selling. World trade has declined and consequently world exports are down 25 per cent from previous levels. This problem not only faces Canada but also other exporters.

Credit facilities. — The Canadian Wheat Board is actively promoting sales and seeking new outlets. The Board is determined to keep the price of Canadian grain competitive. The government is providing full support in the selling of Canadian grain.

In 1969 the government made further credit facilities available to improve the competitive position of Canadian wheat, including the provision of \$6 million for the reduction of interest rates on sales to developing countries on extended terms. This opened a new type of market for Canadian sales. The recent sale to Peru for 7.5 million bushels resulted from this government action. The government is prepared to make further funds available for such sales. This is additional to the credit facilities under which most sales of Canadian wheat to Eastern Europe and China have been made in recent years. The current Canadian Government liability on such credit sales is in excess of \$240 million.

Food aid. — The government this week has increased food aid allocation by \$20 million. This will be channeled both bilaterally and through the World Food Program.

This brings the total for the current fiscal year to \$85 million almost all of which will be used for shipments of wheat and flour. Over the last four years, shipments of wheat and flour in the form of food aid have averaged \$60 million annually, an increase of over 400 per cent on the annual average \$11 million for the previous four years.

Price guarantee. — It has not been possible for Canada, because of actions by other exporters to maintain the minimum International Grains Arrangement price in export markets. But the government has decided to guarantee producers that the price of wheat sold on markets where it has control will not fall below the minimum set under the International Grain Arrangement. This now amounts to \$1.95 1/2 per bushel basis No. 1 Northern. This means that wheat sold for most uses in Canada other than for livestock and poultry feeding will bring the appropriate International Grains Arrangement price. This move will guarantee western farmers the International Grains Arrangement minimum on an important portion of their wheat. At the same time there is no justification for an increase in the price of bread or other wheat products. The milling industry, for example has, until only very recently, been paying the International Grains Arrangement minimum price or higher.

Deferred delivery quota. — Notwithstanding the selling difficulties in the world the Canadian Wheat Board took deliveries of about 500 million bushels of grain in the crop year just ended including 400 million bushels of wheat. The Board has been able to place over 90 per cent of the delivery points on a 5 bushel quota. To accommodate producers at those points where the 5 bushel objective was not achieved the Canadian Wheat Board announced on July 31, 1969 a deferred delivery policy which will assist the equalization of delivery opportunities. A producer will be entitled to deliver the balance of his entitlement up to a maximum of one bushel per specified acre in the new crop year. As space is created and other circumstances permit, the Board will issue the necessary authority to deliver. Such deferred deliveries will not be included in the 1968-69 pool.

Temporary Wheat Reserves Act. — Off-farm stocks of wheat at the close of the crop year were about 450 million bushels. Under the Temporary Wheat Reserve Act the government again will be paying into the wheat pool to provide for storage assistance. On average these payments have covered approximately half the total operating costs of each wheat pool since its enactment. Funds to be paid for the 1969-70 crop year are estimated at \$63 million dollars.

Government liability - Initial Payments 1968-69 crop. — These stocks will be sold at prevailing prices. However, farmers have been paid for the grain on the basis of last year's initial payment of \$1.70 for No. 1 Northern. Currently, selling prices for certain grades are at levels which could result in government payments. The Canadian Government liability could amount to approximately \$4.5 million dollars for every cent that selling prices average below these levels.

Initial Payments 1969-70. — The purpose of initial payments is to provide farmers with cash for grain on delivery and before sold by the Canadian Wheat Board. In current circumstances where prices have declined, a downward adjustment of initial payments is necessary. Accordingly, the initial payments for the basic grades of wheat, oats and barley delivered to the Canadian Wheat Board in the 1969-70 crop year beginning August 1 will be:

\$1.50 a bushel for No. 1 Manitoba Northern Wheat, in store Fort William-Port Arthur or Vancouver.

\$0.60 a bushel for No. 2 Canada Western Oats, in store Fort William-Port Arthur, and

\$0.91 a bushel for No. 3 Canada Western Six Row Barley, in store Fort William-Port Arthur.

Prairie Grain Advance Payments Act. — The Prime Minister's trip west revealed that the extent to which the Prairie Grain Advance Payments Act is of assistance to grain producers is not generally realized. Last November, to help farmers meet the financial requirements of changing farm conditions, the government amended the Act to increase from \$3,000 to \$6,000 the maximum interest-free advance available to producers. These advances are in effect prepayment for grain to be delivered later. The changes for the three grains were from:

\$0.50 to \$1.00 per bushel for Wheat

\$0.20 to \$0.40 per bushel for Oats

\$0.35 to \$0.70 per bushel for Barley.

In February of this year, the government again amended the Act to enable farmers to obtain interest-free emergency cash advances—up to a maximum of \$600 per producer—for grain drying.

The government recently announced another decision with regard to the application of the Act for the 1969-70 crop year. The full entitlement will be payable to all eligible farmers in the new crop year although some may still have an unpaid balance carried over from the 1968-69 year. This decision means that producers will be entitled to advances of approximately \$65 million more than would have been the case if advances in the 1969-70 crop year were reduced by the amount outstanding from the previous crop year.

In the 1968-69 crop year, substantial use was made of the Act and approximately \$152 million was advanced to 85,000 producers. This is well over double the previous highest total of some \$64 million advanced during the 1960-61 crop year to 76,000 producers. If all eligible producers apply for advances in the 1969-70 crop year the total of new money available could go well beyond \$300 million.

Advances to producers are interest-free and the government pays the interest charges which for the 1969-70 fiscal year could reach approximately \$14 million. This compares with an average annual cost to the government of approximately \$700,000 in the period prior to the amendments of the past year.

Adjustments. — Despite the substantial reduction of wheat acreage undertaken by prairie farmers in 1969, a further adjustment may be necessary in order to achieve a better balance between production and realistic prospects for Canadian grain sales. It is probable that for some time we will have sufficient stocks onhand to take advantage—as in the past—of any opportunities for large volume sales. Production must be brought more closely into line with market demand and there is need for resource use adjustment.

The government has given most careful consideration to the international and domestic factors involved and considers that the actions it has taken will go a long way to meet the cash requirements of the prairie farmers and the prairie economy generally in the months ahead. The government is also hopeful that the measures taken will lead to sales expansion but is prepared to consider the need for further measures should sales lag.

Other measures. — Additional assistance measures have been introduced or continued during the past year. Last fall a program of accelerated depreciation for the construction of farm grain storage facilities was introduced.

A special quota was introduced for the 1968 crop for the delivery of damp grain. The Farm Credit Corporation has announced its readiness to consider applications for deferment of payment. Deferments are being granted.

Crop insurance: in the three prairie provinces \$10 million has been paid out in benefits on 1968 crop losses. The federal government pays 25 per cent of the farmer's crop insurance premium and 50 per cent of the cost of administering these insurance programs.

Parliament amended the Farm Credit Act and the Farm Improvement Loans Act to increase money available to farmers. Government spends approximately \$20 million annually on feed freight assistance which assists the marketing of western grain in Eastern Canada and British Columbia.

Farmers continued to be protected under the Prairie Farm Assistance Act against crop hazard.

Delivery Quota
1969-70 Crop Year The Canadian Wheat Board in its Instructions to the Trade re Quotas (General) No. 1 under date of July 31, 1969 announced that the Board wishes to advise that all delivery quotas in effect in the 1968-69 crop year, including open quotas, supplementary quotas, special permits, etc., will automatically expire as at the close of business July 31, 1969.

Effective on and after August 1, 1969, the Board's quota policy for the 1969-70 crop year will be as follows:

Initial Delivery Quota 1969-70 Crop Year. — Wheat (including Durum), Oats, Barley and Rye effective at all delivery points on and after August 1, 1969, the following initial quota is hereby authorized in respect of the above grains:

An initial delivery quota applicable to all permit holders regardless of the acreage shown on their 1969 permit books of the equivalent of one hundred (100) units. Each such unit shall be the equivalent of four (4) bushels of Wheat or ten (10) bushels of Oats or six (6) bushels of Barley or six (6) bushels of Rye.

As space becomes available each permit holder will be entitled to deliver at his option any of the above grains or any combination of the above grains calculated on the unit basis, but his total deliveries under the initial quota must not exceed the equivalent of one hundred (100) units.

Under the above policy a permit holder will be entitled to deliver a maximum of 400 bushels of Wheat or 1,000 bushels of Oats or 600 bushels of Barley or 600 bushels of Rye, or any combination of these grains which, when calculated on the unit basis outlined herein, does not exceed one hundred (100) units.

All deliveries to be made under the initial quota must be entered in the producer's delivery permit book at the time of delivery. Such entries are to be made on Page 1, with the quantity being entered in the appropriate column for the kind of grain delivered. The unit value of the delivery is to be determined by

dividing the bushel quantity by four (4) in the case of Wheat, or ten (10) in the case of Oats, or six (6) in the case of Barley and Rye, calculating same to one decimal point. The total units delivered, as determined above, should then be entered in the "Total Units Delivered" column; for example, a load of 151.4 bushels would be entered as 37.8 units in the case of Wheat, 15.1 units in the case of Oats or 25.2 units if it consisted of Barley or Rye.

Flaxseed. — Effective August 1, at all delivery points within the designated area a quota of five (5) bushels per acre seeded to flaxseed as shown in the individual producer's permit book or two hundred and fifty (250) bushels, whichever is the larger.

All deliveries made under this quota must be properly recorded in the producer's permit book on Page 6 and as in the previous crop year, producers may deliver flaxseed within existing quotas to any delivery point selected by them at which elevator space for flaxseed is available.

Rapeseed. — Effective August 1, at all delivery points within the designated area a quota of five (5) bushels per acre seeded to rapeseed as shown in the individual producer's permit book or two hundred and fifty (250) bushels, whichever is the larger.

All deliveries made under this quota must be properly recorded in the producer's permit book on Page 7 and as in the previous crop year, producers may deliver rapeseed within existing quotas to any delivery point selected by them at which elevator space for rapeseed is available.

Malting, Pot and Pearling Barley. — Effective August 1, 1969, the Board will consider applications on behalf of producers of malting, pot and/or pearling barley, for permission to deliver, in excess of the established quotas, one carlot of such barley provided:

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

Full details covering the foregoing provisions are outlined in Instructions to the Trade re Quotas (General) No. 2 of July 31, 1969.

General Delivery Quotas 1969-70 Crop Year. — Following the initial quota, the Board will establish general quotas at individual delivery points as elevator space becomes available, based on "specified acreage". For the purpose of this Instruction "specified acreage" means the total acreage, accepted by the Board as being accurately listed in a permit book, and shown as seeded to each of wheat, durum wheat, oats, barley and rye, plus acreage summer-fallowed or cultivated and producing eligible forage crops. Eligible forage crops are any forage crops except the following cash crops:

mustard seed	potatoes
soya beans	corn
field beans	sunflower seed
field peas	sugar beets
buckwheat	fruits and market garden crops

The total "specified acreage" for each farm unit is shown in the 1969-70 permit book as the "sub total" in the tabulation of seeded acres.

General quotas do not apply to flaxseed or rapeseed.

Comment. — Please note that the Canadian Wheat Board Act provides that:

- (a) the person delivering grain must be the actual producer of it or entitled to it as a producer;
- (b) if the grain was produced during the crop year it must be delivered by the producer of it under the permit listing the land it was produced on, or if produced by the producer during a previous crop year it may be delivered under the producer's current permit regardless of the land it was produced on.

It is expected that the past experience of producers and elevator managers will be helpful in the administration of delivery quotas during the present crop year and that the available storage space will be handled this Fall and throughout the crop year in the best interests of all concerned.

It will be appreciated if all companies will bring the 1969-70 quota policy to the attention of elevator managers and producers.

General Quota Position By July 28, 1969 out of a total of 1,827 shipping points in the western division, the Canadian Wheat Board had placed 1,305 points on a delivery quota of 5 bushels per specified acre and 489 points on a four-bushel quota. Of the remainder 22 points were on a three-bushel quota and 11 stations were reported as "closed".

Summary of Elevator Shipping Points in the Western Division
as at July 28, 1969

Province	General quota in bushels per specified acre			Closed	Total
	Three	Four	Five		
Ontario	—	—	—	1	1
Manitoba	6	93	225	—	324
Saskatchewan	5	359	619	7	990
Alberta	11	37	455	3	506
British Columbia	—	—	6	—	6
All provinces	22	489	1,305	11	1,827

Crop Conditions in the Prairie Provinces The telegraphic crop report, published by the Dominion Bureau of Statistics, under date of August 13, 1969 summarized crop conditions in the Prairie Provinces as follows: Throughout the Prairie Provinces all crops are reported as being good to excellent. Cereal crops are generally later than normal in many districts due to earlier wet conditions but recent warm weather has hastened maturity. Swathing of barley and early wheat has commenced and rye swathing has been completed in some areas. Moisture conditions are generally good to excellent.

Preliminary Estimates
of Specified Crop and
Summerfallow Acreages
1969

The acreage estimates for 1969 are, with some exceptions, based on returns from the Dominion Bureau of Statistics' annual June survey of seeded acreages and have been made in consultation with the officials responsible for agricultural statistics in each of the provinces. Current

estimates are subject to revision in the light of further information received during the season and when marketing and other check data become available after the end of the crop year.

Preliminary Estimates of Crop and Summerfallow Acreages, 1969
with Comparisons — Canada(1)

Crops	1968	1969	1969 as % of 1968
	acres		per cent
Winter wheat	355,000	360,000	101
Spring wheat(2)	29,067,500 ^r	24,607,700	85
All wheat	29,422,500	24,967,700	85
Oats for grain(3)	8,815,900	8,825,000	100
Barley	8,836,500	9,535,100	108
Fall rye(4)	590,600	821,300	139
Spring rye	88,000	106,000	120
All rye	678,600	927,300	137
Corn for grain	957,500 ^r	972,500	102
Mixed grain	1,667,000	1,740,300	104
Flaxseed	1,524,400	2,440,700	160
Rapeseed	1,052,000	2,012,000	191
Soybeans	295,000	322,000	109
Summerfallow	26,660,000	28,800,000	108

(1) In some provinces the area seeded to certain crops is too small to permit reliable annual estimates. Acreages in such crops have not been included in the totals for Canada.

(2) Includes relatively small acreages of winter wheat in all provinces other than Ontario.

(3) Includes oats for grain and for hay in the Prairie Provinces.

(4) Includes small acreages of spring rye in Quebec, Ontario and British Columbia.

^r Revised figures.

Total wheat acreage in Canada in 1969, estimated at 25.0 million acres, is 15 per cent smaller than last year's 29.4 million. In the Prairie Provinces, where most of Canada's wheat is grown, acreage is estimated at 24.4 million, a decrease of 15 per cent from last year's 28.9 million.

Preliminary estimates of durum wheat acreage in the Prairie Provinces at 3.2 million acres indicate a 33 per cent increase in acreage this year compared with the 1968 revised acreage of 2.4 million acres.

Preliminary Estimate of Durum Wheat Acreages, 1969
with Comparisons — Prairie Provinces

Province	1968	1969	1969 as % of 1968
	acres		per cent
Manitoba	130,000	170,000	131
Saskatchewan	2,000,000 ^r	2,600,000	130
Alberta	240,000	384,000	160
Prairie Provinces	2,370,000 ^r	3,154,000	133

^r Revised figures.

The area seeded to oats in Canada in 1969 is estimated at 8.8 million acres, slightly higher than that of 1968 but 15 per cent smaller than the ten-year average area of 10.4 million acres. In the Prairie Provinces the oats acreage at 6.8 million acres, is 3 per cent larger than that of 1968. Canadian barley acreage for 1969 at 9.5 million acres increased 8 per cent from the 1968 level of 8.8 million and 40 per cent above the ten-year average of 6.8 million. Barley acreage in the Prairies is placed at 9.0 million up 8 per cent from the 1968 level.

Rye acreage at 927,300 is 37 per cent above the 1968 level and 45 per cent above the 10-year (1958-67) average. Fall seedings of rye were up 39 per cent and spring rye acreage increased by 20 per cent. The greater part of Canada's rye is grown in the Prairie Provinces where the 1969 acreage is estimated at 859,000 acres as compared with 619,000 in 1968.

Preliminary Estimates of Crop and Summerfallow Acreages, 1969
with Comparisons — Prairie Provinces

Crop	1968	1969	1969 as % of 1968
	acres		per cent
Spring wheat (including durum) .	28,860,000	24,400,000	85
Oats (including oats for hay) ..	6,600,000	6,800,000	103
Barley	8,330,000	9,000,000	108
Fall rye	531,000	753,000	142
Spring rye	88,000	106,000	120
All rye	619,000	859,000	139
Flaxseed	1,502,000	2,420,000	161
Rapeseed	1,052,000	2,012,000	191
Summerfallow	26,660,000	28,800,000	108

Lake Shipments of Canadian Grain Total shipments of the six major grains out of Lakehead terminals from the opening of navigation to July 23 this year amounted to 98.0 million bushels, slightly above the 97.7 million shipped during the same period in 1968. In 1969 the season of navigation opened on April 11 while the 1968 season opened on April 10. Shipments of wheat, at 70.1 million were below the previous year's total of 77.2 million and accounted for 72 per cent of the total compared to 79 per cent last year.

Lake Shipments of Canadian Grain from the Opening of Navigation to July 23, 1969
and to Approximately the Same Date 1958 to 1968

Year	Wheat	Oats	Barley	Rye	Flaxseed	Rapeseed	Total
	thousand bushels						
1958	108,202	21,866	39,259	4,157	2,653	—	176,137
1959	84,834	11,506	20,500	2,066	2,627	—	121,531
1960	90,846	9,109	22,395	2,301	3,176	—	127,827
1961	127,771	13,548	21,431	1,388	3,076	—	167,214
1962	62,620	7,025	11,141	1,176	2,942	—	84,904
1963	80,953	19,329	10,077	1,485	2,839	—	114,683
1964	164,866	11,159	14,401	2,215	4,421	—	197,061
1965	100,392	18,456	14,183	1,948	3,947	559	139,486
1966	161,940	13,419	16,704	3,818	6,084	555	202,521
1967	140,512	16,085	37,550	2,745	4,609	530	202,031
1968	77,196	7,968	8,764	567	2,930	255	97,681
1969	70,050	6,228	16,404	794	3,733	760	97,969

Farmers' Marketings (1) of Wheat in the Prairie Provinces 1968-69

Week ending		Manitoba	Saskatchewan	Alberta	Total	Last year ^r
bushels						
August	7, 1968	12,286	343,145	1,256	356,687	3,531,842
	14	54,003	433,143	19,546	506,692	410,477
	21	701,320	618,402	734,805	2,054,527	2,368,907
	28	319,028	1,772,613	649,209	2,740,850	5,893,733
September	4	248,115	2,325,413	840,579	3,414,107	14,505,278
	11	146,995	1,597,665	749,639	2,494,299	19,166,857
	18	386,716	4,847,811	2,241,941	7,476,468	12,002,246
	25	560,570	4,814,363	1,744,398	7,119,331	12,262,382
October	2	578,728	4,171,612	1,148,224	5,898,564	8,987,247
	9	1,412,243	6,689,883	3,152,542	11,254,668	5,351,929
	16	914,936	4,950,252	1,904,238	7,769,426	7,247,758
	23	827,874	4,038,282	1,889,876	6,756,032	7,562,502
	30	831,989	5,268,762	4,080,886	10,181,637	9,262,642
November	6	1,653,791	7,100,994	4,580,760	13,335,545	9,717,801
	13	2,037,836	9,768,838	3,876,116	15,682,790	8,840,798
	20	2,099,771	7,917,084	3,227,126	13,243,981	11,217,381
	27	1,661,638	5,918,922	2,334,940	9,915,500	10,032,019
December	4	1,454,530	5,283,400	2,524,710	9,262,640	13,270,298
	11	924,844	3,683,325	1,936,615	6,544,784	15,836,937
	18	886,759	3,627,473	1,257,373	5,771,605	9,311,891
	23	819,810	3,417,705	1,647,864	5,885,379	6,742,989
	31	405,023	1,773,314	1,050,722	3,229,059	7,572,454
January	8, 1969	367,174	2,544,883	1,452,240	4,364,297	4,968,322
	15	416,690	1,351,887	1,047,114	2,815,691	5,554,999
	22	567,950	1,139,430	1,019,662	2,727,042	18,411,991
	29	280,390	814,599	587,479	1,682,468	10,617,794
February	5	255,056	465,482	703,518	1,424,056	5,548,689
	12	485,168	2,509,965	2,902,341	5,897,474	10,319,185
	19	544,539	3,121,188	2,416,389	6,082,116	8,222,761
	26	763,276	3,905,593	2,248,441	6,917,310	4,789,373
March	5	846,130	2,958,912	2,043,881	5,848,923	7,453,488
	12	959,884	4,911,870	2,724,281	8,596,035	6,525,279
	19	975,957	4,280,914	2,985,665	8,242,536	8,254,395
	26	927,805	4,944,237	2,787,007	8,659,049	7,814,669
April	2	772,624	3,472,361	2,342,123	6,587,108	5,208,385
	9	479,651	2,498,795	1,847,450	4,825,896	5,139,919
	16	382,006	1,191,820	2,432,215	4,006,041	3,987,431
	23	497,967	4,403,412	2,222,129	7,123,508	6,124,617
	30	635,750	7,332,422	1,754,416	9,722,588	6,945,084
May	7	637,801	5,165,916	1,778,916	7,582,633	4,895,997
	14	728,083	3,851,829	655,485	5,235,397	4,076,927
	21	933,144	2,128,540	1,514,667	4,576,351	3,902,474
	28	552,086	3,048,278	1,165,489	4,765,853	7,104,613
June	4	1,053,353	6,935,890	2,337,079	10,326,322	9,954,109
	11	2,271,798	8,301,180	3,168,421	13,741,399	12,510,162
	18	3,255,854	8,965,920	2,900,829	15,122,603	12,292,525
	25	2,870,427	8,053,016	2,967,569	13,891,012	12,582,318
July	2	1,651,761	5,849,695	2,708,385	10,209,841	11,569,445
	9	2,256,735	4,912,908	2,730,023	9,899,666	8,980,513
	16	2,294,501	7,753,558	3,591,807	13,639,866	7,696,472
	23	3,492,306	12,019,929	3,383,197	18,895,432	10,917,414
Totals		51,094,671	219,196,830	104,011,583	374,303,084	433,465,718
Average similar						
period: 1957-58 - 1966-67 .		49,613,954	270,588,495	101,282,913	421,485,362	

(1) Includes receipts at country, interior private and mill elevators, interior semi-public terminals and platform loadings.
^r Revised figures.

Visible Supply of Canadian Wheat, July 23, 1969
Compared with Approximately the Same Date, 1967 and 1968

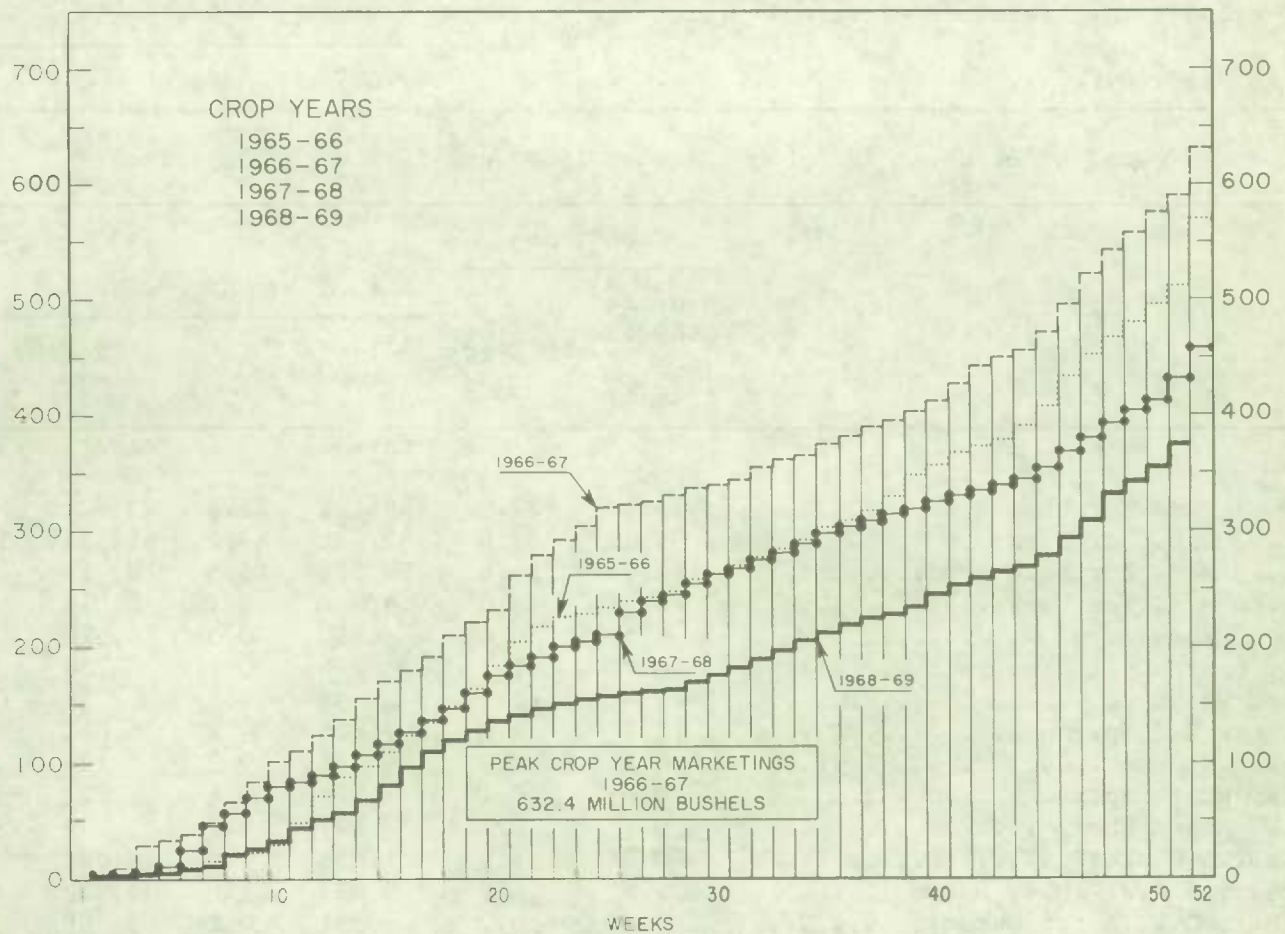
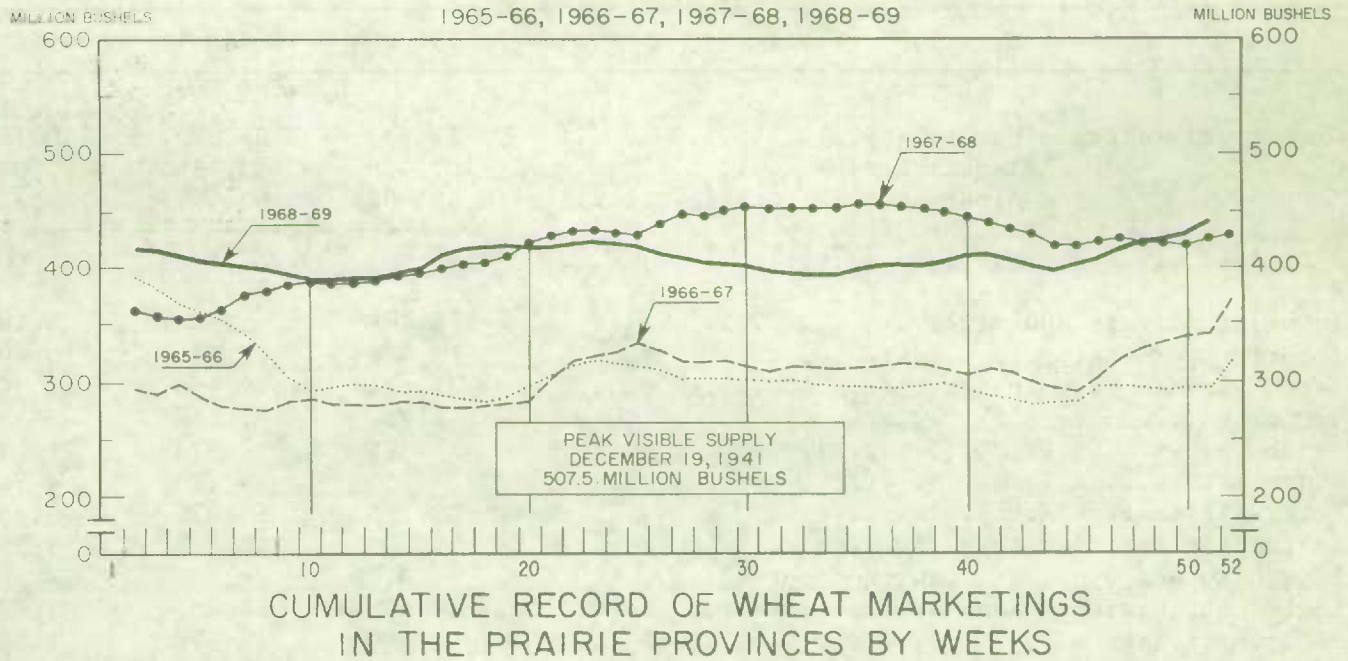
Position	1967	1968	1969
	thousand bushels		
Country elevators — Manitoba	17,452	34,504	30,761
Saskatchewan	107,428	143,654	157,025
Alberta	59,482	67,968	78,019
Totals	184,362	246,126	265,805
Interior private and mill	6,149	5,306	5,188
Interior terminals	13,466	13,734	10,795
Vancouver-New Westminster	8,831	10,589	11,395
Victoria	723	548	755
Prince Rupert	565	573	1,245
Churchill	4,260	4,694	4,763
Fort William-Port Arthur	43,386	63,026	49,455
In transit rail (western division)	19,643	18,527	19,960
Bay, Lake and Upper St. Lawrence ports	31,477	28,486	32,564
Lower St. Lawrence and Maritime ports	30,049	22,557	37,974
In transit lake	3,480	12,378	1,960
In transit rail (eastern division)	996	224	374
Totals	347,387	426,768	442,233

Grading of Wheat Inspected, August 1968-June 1969 with Comparisons

Grade	Crop year		August - June			
	Average	1967-68	1967-68		1968-69	
	1962-63		1967-68		1968-69	
	1966-67					
	%		cars	%	cars	%
No. 1 Man. Northern	5.1	27.9	48,122	25.8	23,821	12.9
No. 2 Man. Northern	35.8	43.4	82,521	44.2	62,535	33.8
No. 3 Man. Northern	22.7	14.8	28,522	15.3	18,413	9.9
No. 4 Man. Northern	10.5	3.0	5,858	3.1	6,014	3.2
No. 5 Wheat	4.5	0.4	850	0.5	4,516	2.4
No. 6 Wheat	0.6	0.1	274	0.1	288	0.2
Feed Wheat	(1)	(1)	38	(1)	38	(1)
Others Red Spring	13.3	4.0	7,874	4.2	56,641	30.6
C.W. Garnet	0.2	0.3	533	0.3	124	0.1
C.W. White Spring	0.1	0.1	229	0.1	271	0.1
C.W. Mixed Wheat	0.1	0.1	127	0.1	93	0.1
Alberta Winter	0.7	1.0	1,899	1.0	862	0.5
Nos. 1-6 C.W. Amber Durum	5.8	4.7	9,323	5.0	5,923	3.2
Others C.W. Amber Durum	0.4	0.2	391	0.2	5,589	3.0
Totals	100.0	100.0	186,561	100.0	185,128	100.0
Gross bushels (approx.)			361,718,000		354,067,000	

(1) Less than .05 per cent.

WEEKLY VISIBLE SUPPLY OF CANADIAN WHEAT



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

Wheat Shipments to
the United States

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 July 23, 1969.

During the comparable periods of 1967-68 and 1966-67 shipments amounted to 4 thousand and 155 thousand bushels, respectively.

Wheat Shipments(1) to the United States by Destination
August 1, 1968 — July 23, 1969 with Comparisons

Destination	1966-67	1967-68	1968-69
		bushels	
By Rail			
U.S.A. domestic points	154,913	4,357	—
Totals, shipments	154,913	4,357	—

(1) Either for re-export or retention for domestic use. Excluding seed.

Rail Shipments
of Wheat to
Maritime Ports

Rail shipments of wheat to Maritime ports from Bay, Lake and Upper St. Lawrence ports during August 1968 — June 1969 amounted to 16,901,000 bushels compared with the August — June 1967-68 figure of 11,659,000.

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

Origin of shipments	August 1, 1967 — June 30, 1968	August 1, 1968 — June 30, 1969
		bushels
Port McNicoll	3,940,013	4,816,974
Midland, Tiffin	2,371,831	4,813,309
Collingwood	366,430	63,817
Owen Sound	2,770,779	2,315,547
Goderich	1,474,337	1,782,903
Sarnia	726,274	1,265,504
Port Colborne	9,383	1,843,418
Totals	11,659,047	16,901,472

Rail Shipments of Wheat from Fort William-Port Arthur, 1965-66 — 1968-69

Month	1965-66	1966-67	1967-68	1968-69
bushels				
August	10,458	118,973	133,651	—
September	10,500	83,333	182,051	23,084
October	4,500	89,384	152,009	57,458
November	10,205	163,332	50,475	101,966
December	7,500	106,833	143,833	44,136
January	46,108	145,889	160,214	131,034
February	26,712	120,334	143,884	99,776
March	98,598	177,393	274,690	153,067
April	71,701	133,699	123,167	79,899
May	89,166	207,038	61,460	108,339
June	178,183	154,139	101,950	120,532
July	82,282	93,094	88,500	—
Totals	635,913	1,593,441	1,615,884	—

Distribution of Rail Shipments of Wheat from Fort William-Port Arthur, June 1969

Grade	Prince Edward Island	Nova Scotia	New Brunswick	Quebec	Ontario
bushels					
5 Wheat	1,500	3,333	6,000	—	—
6 Wheat	3,500	19,500	71,000	—	—
Durum	—	—	—	3,000	3,000
Others	—	—	—	9,699	—
Totals	5,000	22,833	77,000	12,699	3,000

Overseas Exports of Canadian Grain by Ports of Loading, August 1, 1968 — July 23, 1969
with Comparisons

Port	Wheat(1)	Durum wheat(1)	Oats(1)	Barley	Rye	Flaxseed	Rapeseed
thousand bushels							
<u>Pacific Seaboard</u>							
Van.-New West.	136,756	669	231	10,583	1,756	6,225	13,285
Victoria	6,531	—	—	—	—	—	—
Prince Rupert	4,903	—	—	—	—	—	—
<u>Churchill</u>	21,613	—	—	—	—	—	—
<u>Lakehead direct</u>	3,636	853	679	2,339	1,254	2,813	708
<u>Toronto direct</u>	93	—	—	—	—	—	—
<u>Prescott direct</u>	336	—	—	—	—	—	—
<u>St. Lawrence</u>							
Montreal	12,685	8,736	336	—	100	311	—
Sorel	3,604	—	—	—	—	—	—
Trois-Rivières	3,832	259	26	—	122	6	—
Quebec	8,075	1,315	—	—	—	938	—
Baie Comeau	16,032	600	—	—	—	1,826	—
Port Cartier	17,439	5,304	—	—	—	277	—
<u>Maritime</u>							
Saint John	474	—	—	—	—	—	—
West Saint John ...	10,135	446	53	—	—	891	—
Halifax	9,218	—	—	—	—	—	—
Totals	255,362	18,181	1,326	12,922	3,232	13,288	13,992
August 1, 1967 — July 24, 1968	279,326	11,902	1,789	31,718	3,955	12,539	11,736

(1) Excluding seed.

Monthly Exports of Canadian Wheat and Wheat Flour

Year and month	Wheat in bulk(1)	Seed wheat(2)	Total wheat	Wheat flour(2,3)	Total wheat and wheat flour(3)
thousand bushels					
<u>1966-67</u>					
August	64,233	132	64,365	2,753	67,118
September	47,357	103	47,460	2,122	49,582
October	51,659	39	51,698	3,551	55,250
November	48,942	53	48,995	2,471	51,466
December	33,477	47	33,523	3,889	37,412
January	27,719	48	27,767	3,004	30,771
February	20,102	52	20,154	1,616	21,771
March	21,718	128	21,845	3,663	25,508
April	27,847	81	27,928	2,475	30,403
May	57,134	11	57,145	2,502	59,647
June	47,517	6	47,522	2,812	50,334
July	35,033	18	35,051	993	36,044
Totals	482,737	719	483,456	31,851	515,307
<u>1967-68</u>					
August	24,424	52	24,477	2,773	27,249
September	20,211	60	20,272	2,037	22,309
October	19,851	67	19,917	1,581	21,498
November	21,967	99	22,066	1,811	23,877
December	12,920	56	12,976	2,355	15,332
January	19,259	56	19,315	1,737	21,052
February	18,903	62	18,965	2,394	21,359
March	21,388	169	21,557	2,621	24,178
April	26,661	5	26,666	2,036	28,702
May	42,311	7	42,317	2,061	44,378
June	40,798	1	40,799	1,349	42,148
July	41,975	18	41,993	1,937	43,930
Totals	310,669	651	311,320	24,690	336,010
<u>1968-69(4)</u>					
August	31,127	1	31,128	2,270	33,398
September	30,019	45	30,064	2,437	32,500
October	25,995	(5)	25,996	2,079	28,074
November	23,338	68	23,406	2,053	25,459
December	16,061	50	16,112	1,934	18,045
January	18,843	9	18,853	1,574	20,427
February	24,149	31	24,181	2,005 ^r	26,186 ^r
March	19,857	134	19,990	2,544	22,534
April	10,278	82	10,361	1,249	11,610
May	30,350	136	30,487	1,572	32,059
June	24,016	10	24,027	2,032	26,059
Totals	254,035	568	254,603	21,747	276,350

- (1) Export clearances including shipments to the United States compiled by the Statistics Division, Board of Grain Commissioners for Canada.
- (2) Compiled from Canadian Customs returns, 1966-67 and 1967-68 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) Preliminary, subject to revision.
- (5) Less than 500 bushels.
- ^r Revised figures.

Exports of Canadian Wheat(1) by Destination, June 1969 and 1968

Destination	Wheat (except durum)	Durum wheat	All wheat	
			June 1969	June 1968 ^r
bushels				
<u>Western Europe</u>				
EEC:				
Belgium and Luxembourg	223,615	—	223,615	849,500
France	9,186	—	9,186	37,333
Germany, Federal Republic	1,334,910	—	1,334,910	1,815,245
Italy	45,000	545,067	590,067	1,713,273
Netherlands	214,667	115,733	330,400	262,699
Sub-totals	1,827,378	660,800	2,488,178	4,678,050
<u>Other Western Europe</u>				
Austria	—	289,370	289,370	173,600
Britain	3,806,990	19,600	3,826,590	2,876,768
Denmark	—	—	—	9,333
Finland	—	—	—	310,400
Ireland	56,000	—	56,000	—
Switzerland	234,922	28,400	263,322	411,715
Sub-totals	4,097,912	337,370	4,435,282	3,781,816
Totals	5,925,290	998,170	6,923,460	8,459,866
<u>Eastern Europe</u>				
Albania	—	—	—	369,600
Czechoslovakia	—	—	—	2,936,101
Hungary	—	—	—	2,016,356
U.S.S.R. (Russia)	—	—	—	6,797,476
Totals	—	—	—	12,119,533
<u>Africa</u>				
Ghana	94,600	—	94,600	—
<u>Asia</u>				
Afghanistan	5,144	—	5,144	—
Hong Kong	—	—	—	30,613
India	—	—	—	6,115,126
Iraq	—	—	—	44,092
Japan	5,496,658	206,438	5,703,096	2,797,601
Malaysia	19,600	—	19,600	74,667
People's Republic of China	10,955,950	—	10,955,950	9,156,636
Singapore	39,200	—	39,200	35,467
Syria	—	—	—	137,282
Taiwan	—	—	—	491,680
Turkey	—	—	—	124,927
Totals	16,516,552	206,438	16,722,990	19,008,091
<u>Western Hemisphere</u>				
Barbados	40	—	40	—
Cuba	—	—	—	855,134
Jamaica	275,198	—	275,198	213,796
Venezuela	—	—	—	141,866
Totals	275,238	—	275,238	1,210,796
Sub-totals, all countries	22,811,680	1,204,608	24,016,288	40,798,286
Seed wheat(2)			10,472	702
Totals, all countries	22,811,680	1,204,608	24,026,760	40,798,988

(1) Overseas clearances as reported by the Statistics Division, Board of Grain Commissioners for Canada, for all countries except the United States. Excluding seed wheat. (2) Compiled from Canadian Customs returns, 1968 adjusted for time lag, 1969 preliminary. ^r Revised figures.

Cumulative Exports of Canadian Wheat(1) by Destination

Destination	August 1968 - June 1969			Total same period last year ^r
	Wheat (except durum)	Durum wheat	Total wheat	
bushels				
<u>Western Europe</u>				
EEC:				
Belgium and Luxembourg	6,308,475 ^r	90,600 ^r	6,399,075 ^r	8,847,182
France	1,972,382 ^r	2,285,515 ^r	4,257,897 ^r	547,166
Germany, Federal Republic ...	7,628,482 ^r	4,178,708	11,807,190 ^r	16,137,499
Italy	6,075,653	4,959,411	11,035,064	7,627,736
Netherlands	4,939,749 ^r	539,333 ^r	5,479,082 ^r	4,845,393
Sub-totals	26,924,741 ^r	12,053,567 ^r	38,978,308 ^r	38,004,976
<u>Other Western Europe</u>				
Austria	—	768,438	768,438	638,430
Britain	52,144,867 ^r	273,460	52,418,327 ^r	58,525,910
Denmark	22,027	—	22,027	31,733
Finland	638,500	—	638,500	962,240
Ireland	806,400	—	806,400	1,159,431
Malta and Gozo	588,592	—	588,592	572,320
Norway	588,000	—	588,000	1,706,955
Sweden	80,304	—	80,304	52,267
Switzerland	2,635,814 ^r	2,574,401 ^r	5,210,215 ^r	2,466,004
Sub-totals	57,504,504 ^r	3,616,299 ^r	61,120,803 ^r	66,115,290
Totals	84,429,245	15,669,866	100,099,111	104,120,266
<u>Eastern Europe</u>				
Albania	—	—	—	741,104
Czechoslovakia	—	—	—	4,399,568
Hungary	2,939,633	—	2,939,633	2,443,570
Poland	3,267,960	146,981	3,414,941	2,500,944
U.S.S.R. (Russia)	1,734,881	—	1,734,881	45,373,999
Totals	7,942,474	146,981	8,089,455	55,459,185
<u>Africa</u>				
Algeria	1,796,005	—	1,796,005	818,577
Congo	36,500	—	36,500	—
Ghana	1,605,777	—	1,605,777	202,047
Mauritania	1,212	—	1,212	—
Niger	687,344	—	687,344	—
Nigeria	—	—	—	582,400
Republic of South Africa	—	—	—	901,600
Sierra Leone	141,866	—	141,866	—
Sudan	—	—	—	36,195
Tanzania	110,235	—	110,235	298,680
Tunisia	—	692,139	692,139	461,626
Totals	4,378,939	692,139	5,071,078	3,301,125

See footnotes at end of table.

Cumulative Exports of Canadian Wheat(1) by Destination

Destination	August 1968 - June 1969			Total
	Wheat (except durum)	Durum wheat	Total wheat	same period last year ^r
bushels				
Asia				
Afghanistan	6,154	—	6,154	—
Hong Kong	779,857	—	779,857	839,813
India	15,306,956	—	15,306,956	10,953,131
Indonesia	29,394	—	29,394	—
Iraq	12,860	—	12,860	44,092
Israel	522,000	—	522,000	—
Japan	39,367,333	668,755	40,036,088	35,082,186
Jordan	—	—	—	12,860
Lebanon	—	—	—	8,613
Malaysia	385,695	—	385,695	444,454
Pakistan	2,753,926	—	2,753,926	875,609
People's Republic of China	71,816,360	—	71,816,360	45,668,564
Philippines	—	—	—	927,733
Saudi Arabia	—	—	—	146,249
Singapore	160,767	—	160,767	195,627
Syria	2,020,883	—	2,020,883	170,130
Taiwan	520,837	—	520,837	902,249
Turkey	32,518	—	32,518	124,927
Totals	133,715,540	668,755	134,384,295	96,396,237
Western Hemisphere				
Bahamas	40	—	40	—
Barbados	139	—	139	40
Cuba	1,712,200	—	1,712,200	5,494,241
Ecuador	412,150	—	412,150	293,456
El Salvador	—	—	—	167,488
Guatemala	16,667	—	16,667	3,685
Haiti Republic	328,533	—	328,533	—
Jamaica	1,180,731	—	1,180,731	457,948
Paraguay	1,727	—	1,727	—
St. Lucia	187	—	187	373
Trinidad and Tobago	220,133	—	220,133	—
Venezuela	2,517,191	1,823	2,519,014	2,995,378
United States(2)	—	—	—	4,357
Totals	6,389,698	1,823	6,391,521	9,416,966
Sub-totals, all countries ..	236,855,896	17,179,564	254,035,460	268,693,779
Seed wheat(3)			567,815	633,532
Totals, all countries	236,855,896	17,179,564	254,603,275	269,327,311

(1) Overseas clearances as reported by the Statistics Division, Board of Grain Commissioners for Canada, for all countries except the United States, excluding seed. (2) Compiled from returns of Canadian elevator licensees and advice from American grain correspondents. (3) Compiled from Canadian Customs returns, 1967-68 adjusted for time lag, 1968-69 preliminary. ^r Revised figures.

FARMERS' MARKETINGS OF WHEAT, PRAIRIE PROVINCES

(SPECIFIED PERIODS)

MILLION BUSHELS

MILLION BUSHELS

800

700

600

500

400

300

200

100

0

800

700

600

500

400

300

200

100

0

PEAK MARKETINGS
1966-67 CROP YEAR
632.4 MILLION BUSHELS

JULY

JUNE

MAY

APR

MAR

FEB

JAN

DEC

NOV

OCT

SEPT

30 year average
1937-38
1966-67

10 year average
1957-58
1966-67

1963-64

1964-65

1965-66

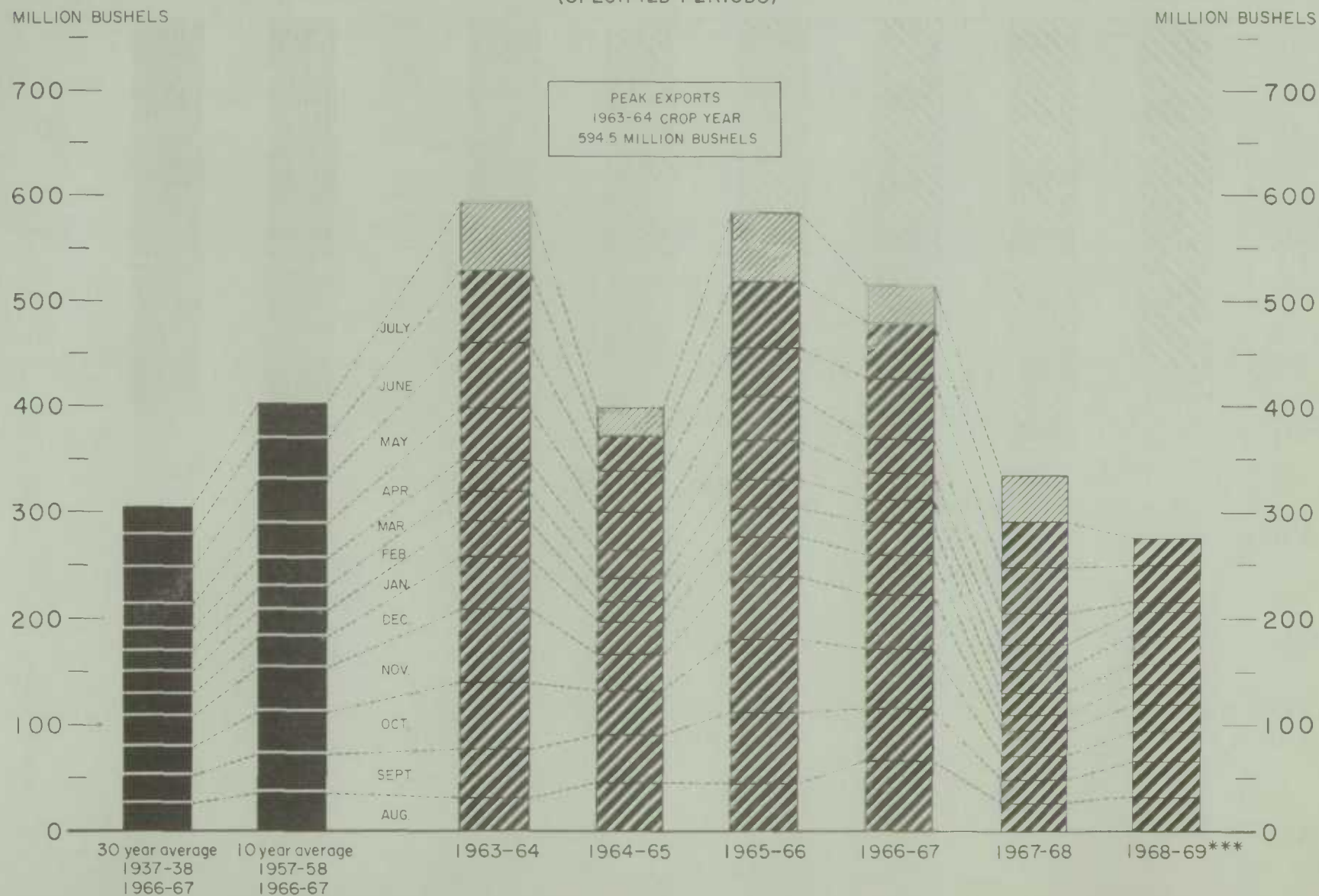
1966-67

1967-68

1968-69

EXPORTS OF CANADIAN WHEAT* AND WHEAT FLOUR**

(SPECIFIED PERIODS)



*Beginning with 1955-56 includes seed wheat.

** In terms of wheat equivalent.

*** Preliminary.

Agriculture Division D.B.S.

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

MILLION BUSHELS

140 —

120 —

100 —

80 —

60 —

40 —

20 —

0

MILLION BUSHELS

140 —

120 —

100 —

80 —

60 —

40 —

20 —

0

30 year average
1937-38
1966-67

10 year average
1957-58
1966-67

1963-64

1964-65

1965-66

1966-67

1967-68

1968-69

JULY

JUNE

MAY

APR

MAR

FEB

JAN

DEC

NOV

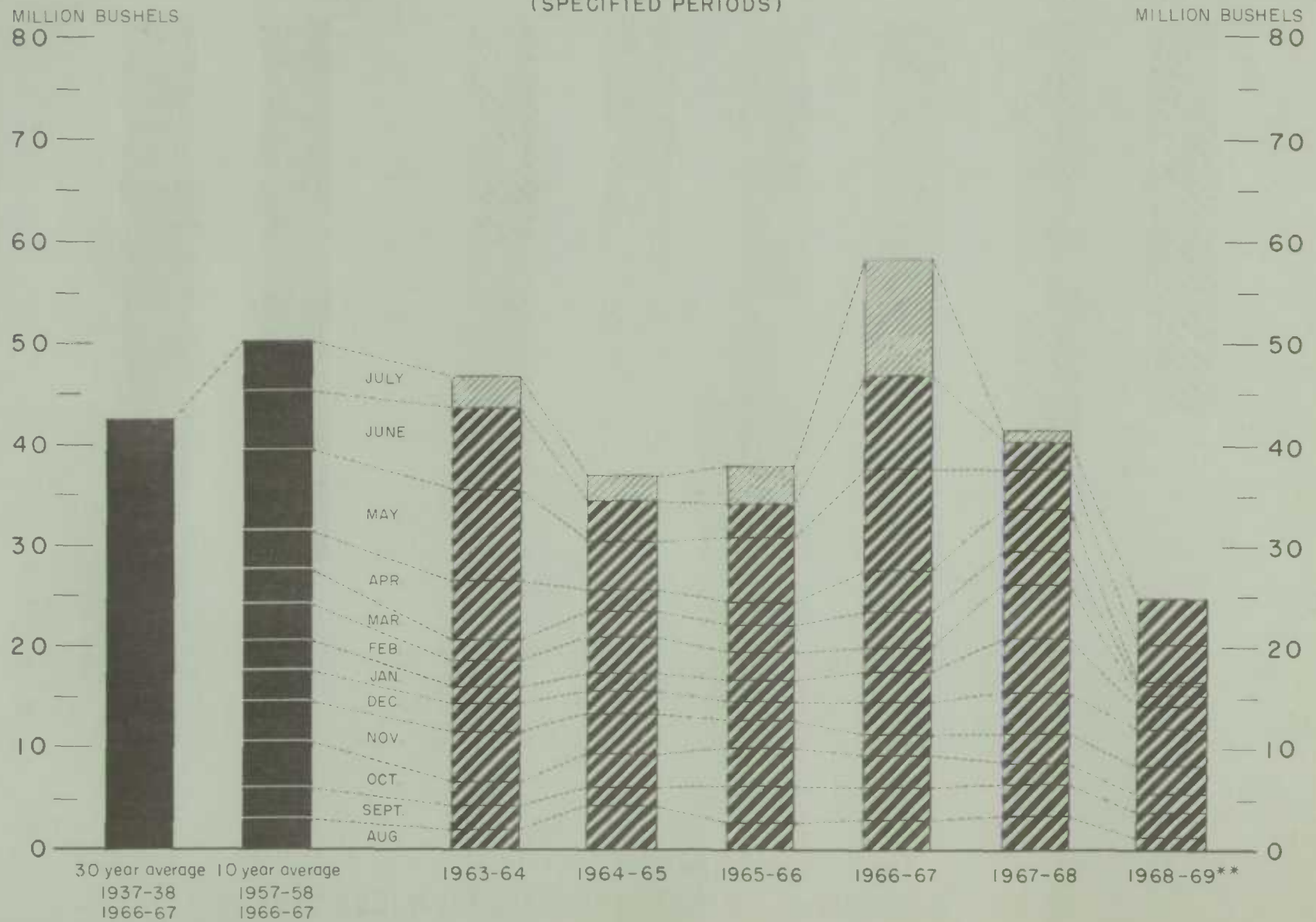
OCT

SEPT

AUG

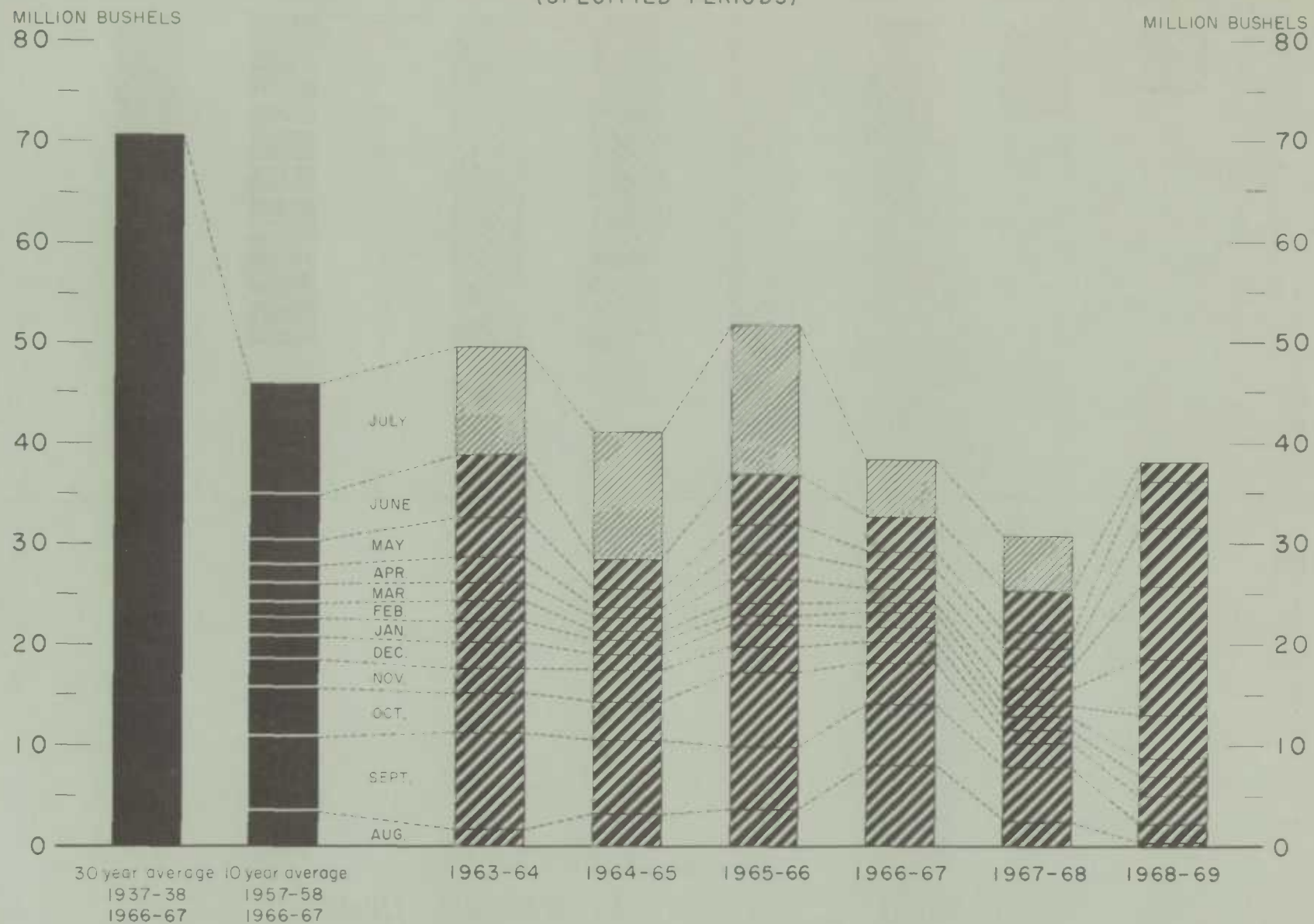
EXPORTS OF CANADIAN BARLEY AND BARLEY PRODUCTS*

(SPECIFIED PERIODS)

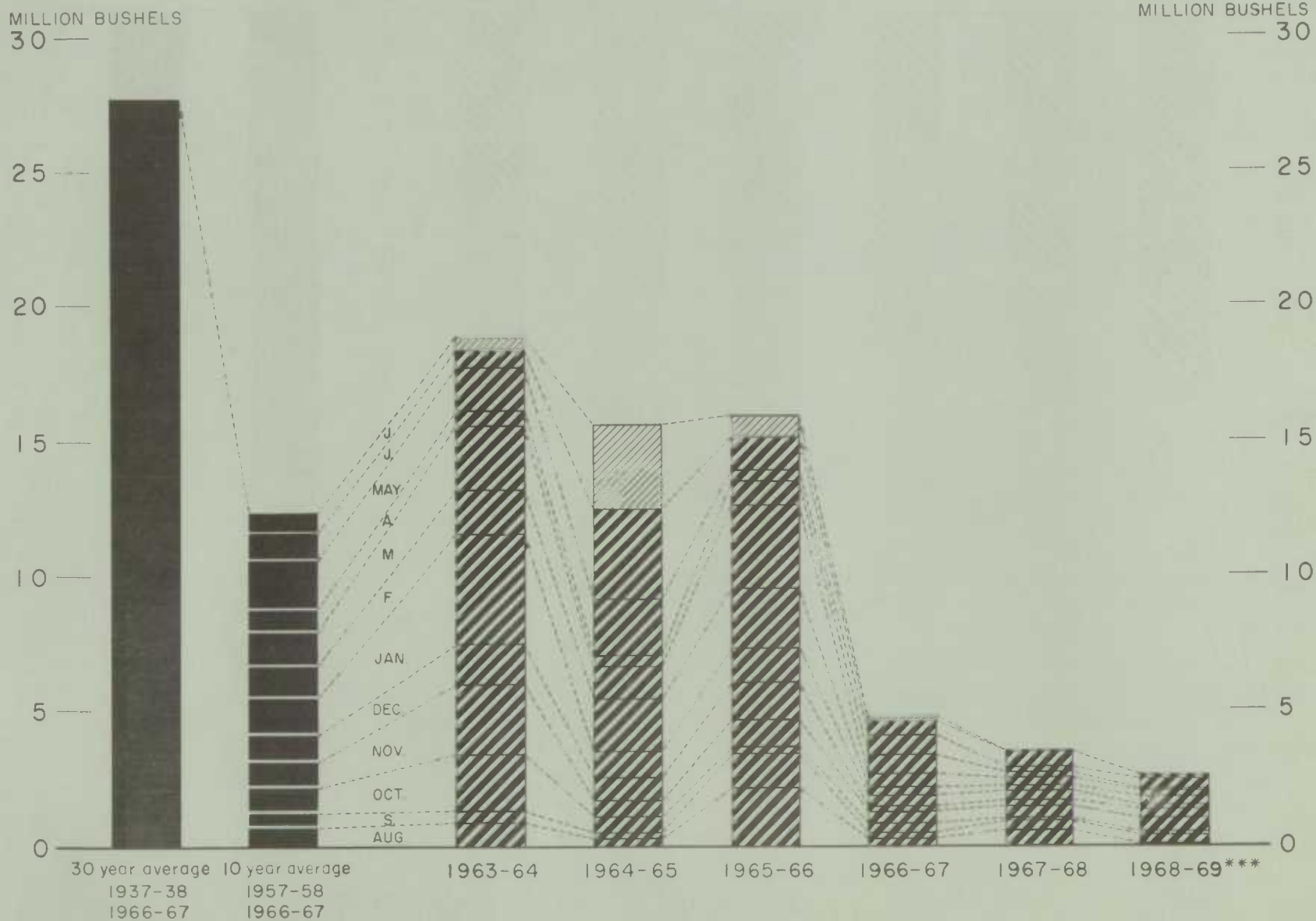


* In terms of grain equivalent ** Preliminary.

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



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



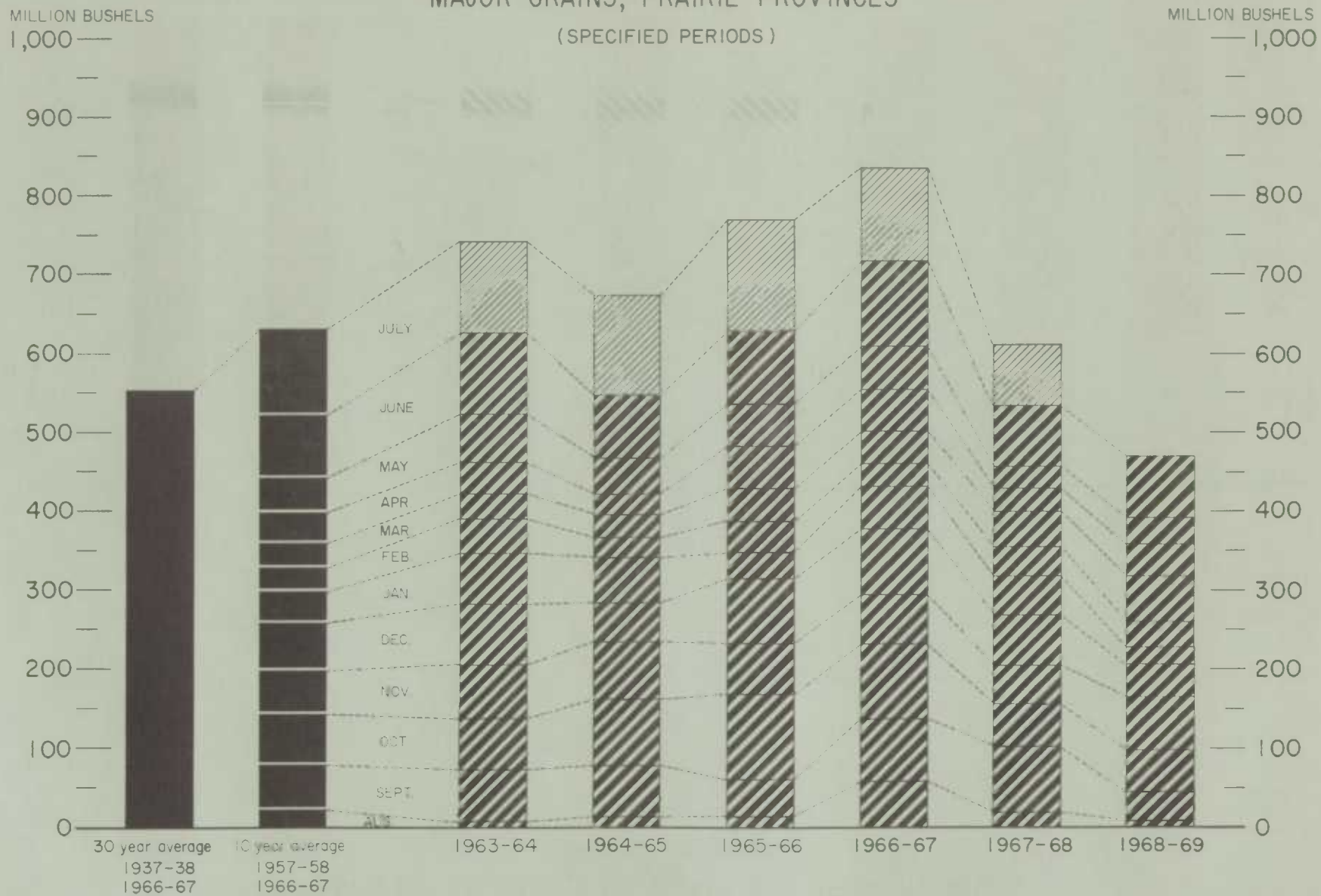
* Beginning with 1960-61 includes relatively small quantity of seed oats.

** In terms of grain equivalent.

*** Preliminary.

Agriculture Division D.B.S.

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

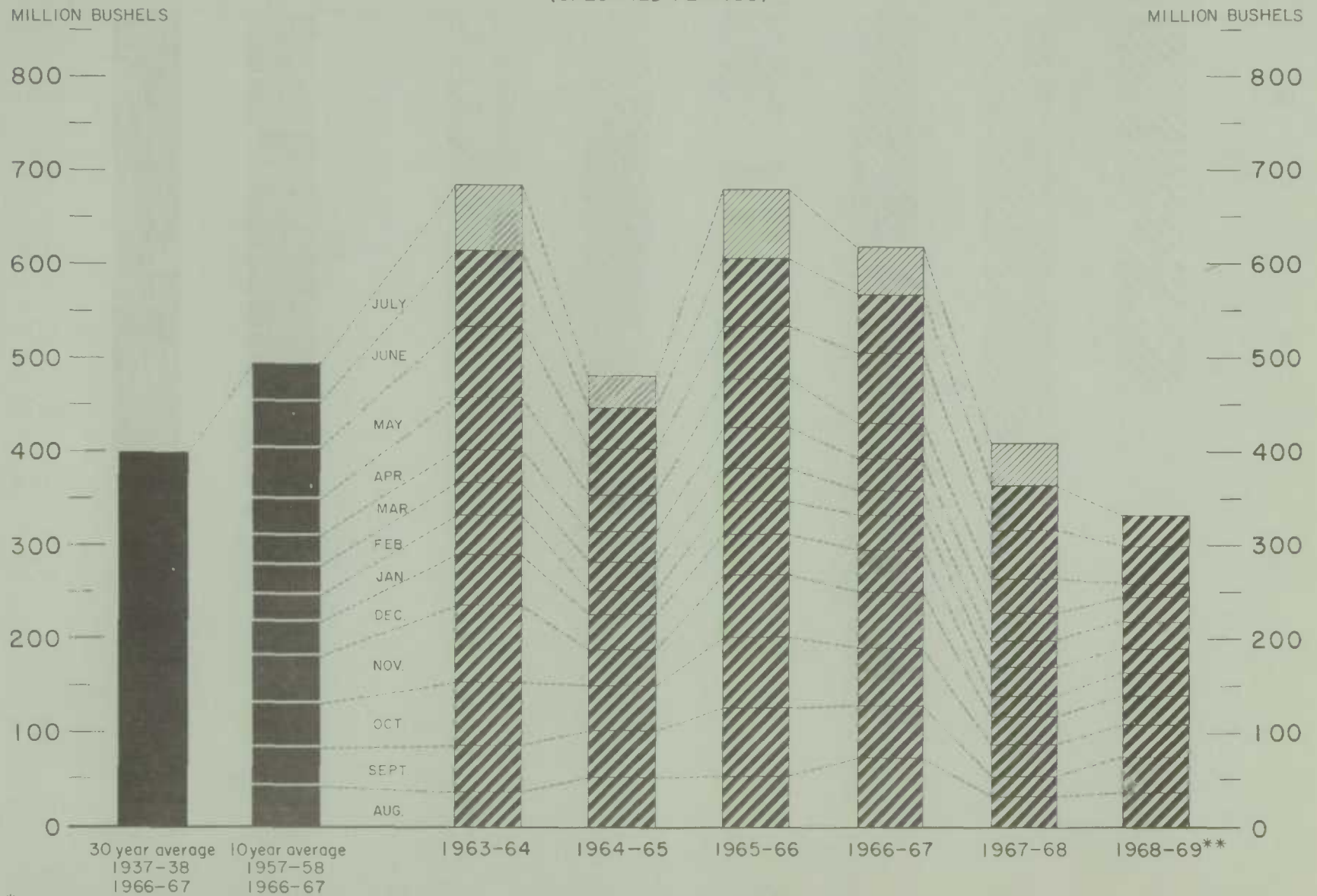


* Wheat, oats, barley, rye, flaxseed and from 1960-61 rapeseed

Agriculture Division D B S.

EXPORTS OF CANADA'S SIX MAJOR GRAINS AND PRODUCTS*

(SPECIFIED PERIODS)



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

Customs Exports of Canadian Wheat Flour by Countries of Consignment

Destination	March 1969(1)	June 1969(2)	August — June	
			1968-69(2)	1967-68(1)
			bushels	
<u>Western Europe</u>				
EEC:				
Belgium and Luxembourg	28,235	9,223	105,996	95,652
Italy	—	—	16,560	20,585
Netherlands	398	225	3,544	16,921
Sub-totals	28,633	9,448	126,100	133,158
<u>Other Western Europe</u>				
Britain	266,053	149,438	2,293,831	2,652,192
Denmark	—	—	460	920
Gibraltar	—	—	7,728	14,812
Greece	—	—	57,875	64,986
Iceland	—	—	3,386	3,850
Ireland	—	—	5,538	6,762
Norway	—	—	230	115
Portugal	7,905	1,967	36,451	72,811
Spain	—	—	—	1,967
Sweden	—	—	515	515
Switzerland	—	—	—	92
Sub-totals	273,958	151,405	2,406,014	2,819,022
Totals	302,591	160,853	2,532,114	2,952,180
<u>Africa</u>				
Algeria	—	—	65,870	138,941
Angola	11,500	5,750	19,780	24,955
Cameroon Republic	—	5,750	27,152	20,203
Congo-Kinshasa	12,880	6,900	64,055	80,334
Dahomey	12,687	2,990	35,303	43,447
French Africa n.e.s.	—	—	8,285	—
Gambia	11,500	10,350	60,111	83,520
Ghana	76,507	54,018	1,249,654	1,424,020
Guinea Republic	—	16,144	114,237	—
Ivory Coast	690	690	5,865	8,294
Liberia	20,527	27,582	167,824	163,254
Libya	—	—	—	225
Malawi	12,468	5,336	50,694	60,593
Morocco	—	—	—	53,243
Mozambique	6,955	1,737	52,960	40,043
Nigeria	—	—	230	—
Portuguese Africa n.e.s.	21,298	3,795	72,618	38,421
Republic of South Africa	—	—	—	6,751
Senegal	—	—	—	460
Sierra Leone	113	251	9,462	9,126
Tanzania	1,150	—	6,900	12,880
Togo	7,176	9,770	131,610	132,491
Tunisia	—	—	—	2,222
U.A.R. — Egypt	—	15,214	767,413	36,963
Zambia	—	—	2,300	6,900
Totals	195,451	166,277	2,912,323	2,387,286

See footnotes on page 27.

Customs Exports of Canadian Wheat Flour by Countries of Consignment

Destination	March 1969(1)	June 1969(2)	August - June	
			1968-69(2)	1967-68(1)
			bushels	
<u>Asia</u>				
Aden	—	—	—	6,440
Afghanistan	—	—	621	517
Bahrain	—	35	35	591
Ceylon	1,921	—	855,372	859,628
Cyprus	—	55	522	—
Hong Kong	33,580	16,503	327,196	356,457
India	—	—	453	79,732
Indonesia	256,891	1,610	618,748	—
Iran	2,074	547	5,168	1,377
Iraq	13,055	—	46,522	—
Israel	—	—	228,390	543,837
Japan	345	—	7,555	5,966
Jordan	122	—	122	5,219
Korea, South	—	—	7,815	19,470
Lebanon	10,681	227,684	427,474	195,942
Pakistan	—	230	230	—
Philippines	—	—	1,012	354
Portuguese Asia	3,588	—	17,009	14,950
Qatar	402	—	798	655
Saudi Arabia	28,412	7,590	42,442	150,521
Syria	—	—	54,977	71,231
Thailand	20,965	18,138	235,608	195,590
Trucial States	943	16	2,845	322
Viet-Nam	—	—	920	—
Totals	372,979	272,408	2,881,834	2,508,799
<u>Oceania</u>				
British Oceania n.e.s. ...	460	460	7,415	3,105
Fiji	—	345	5,359	7,151
New Zealand	—	—	460	173
United States Oceania	3,450	—	24,159	39,330
Totals	3,910	805	37,393	49,759
<u>Western Hemisphere</u>				
Bahamas	25,316	24,042	280,225	285,640
Barbados	31,864	20,829	262,308	189,879
Bermuda	9,071	3,940	103,664	99,335
Bolivia	—	—	18,257	18,462
Brazil	—	—	—	110
British Honduras	10,051	5,720	41,234	53,475
Chile	—	—	—	205

See footnotes on page 27.

Customs Exports of Canadian Wheat Flour by Countries of Consignment

Destination	March 1969(1)	June 1969(2)	August — June	
			1968-69(2)	1967-68(1)
			bushels	
<u>Western Hemisphere — Concluded</u>				
Colombia	—	—	—	10,147
Costa Rica	—	—	—	2,350
Cuba(3)	1,543,321	1,109,129	10,180,738	10,741,605
Dominican Republic	—	—	2,162	2,436
Ecuador	—	—	345	—
El Salvador	—	—	487	483
French Guiana	—	—	—	920
French West Indies	1,612	—	3,455	7,443
Guatemala	—	—	7,130	4,950
Guyana	9,968	7,854	77,178	69,695
Haiti Republic	59,731	25,691	296,475	21,753
Honduras Republic	637	—	14,745	24,822
Jamaica	6,886	12,544	153,065	1,452,689
Leeward and Windward Islands	63,301	79,233	785,246	751,769
Netherlands Antilles	27,152	9,393	163,502	125,769
Panama	398	—	2,114	39,914
Paraguay	—	—	2,383 ^r	—
Peru	—	—	10,064	22,848
Puerto Rico	—	—	—	96
St. Pierre and Miquelon	1,918	805	19,318	23,529
Surinam	741	1,021	8,938	7,570
Trinidad and Tobago	69,711	49,629	518,521	362,942
Venezuela	—	462	945	598
United States Virgin Islands	—	—	380	—
United States	22,936	81,261	430,624	534,168
Totals	1,884,614	1,431,553	13,383,503 ^r	14,855,602
Totals, all countries ..	2,759,545	2,031,896	21,747,167 ^r	22,753,626

(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.

(3) Source - Canadian National Millers Association.

^r Revised figures.

n.e.s. - Not elsewhere specified.

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

Class and grade	Week ending					
	July 4	July 11	July 18	July 25	August 1 (1,2)	
cents and eighths per bushel						
<u>Initial payment to producers</u>						
1 Northern	170	170	170	170	170	150
2 Northern	166	166	166	166	166	146
3 Northern	162	162	162	162	162	141
4 Northern	155	155	155	155	155	133
5 Wheat	141	141	141	141	141	119
6 Wheat	137	137	137	137	137	115
Feed Wheat	133	133	133	133	133	110
1 C.W. Garnet	155	155	155	155	155	133
2 C.W. Garnet	150	150	150	150	150	128
3 C.W. Garnet	145	145	145	145	145	123
1 Alberta Red Winter	154	154	154	154	154	132
2 Alberta Winter	149	149	149	149	149	127
3 Alberta Winter	143	143	143	143	143	121
1 C.W. Amber Durum	170	170	170	170	170	150
2 C.W. Amber Durum	166	166	166	166	166	146
3 C.W. Amber Durum	162	162	162	162	162	141
<u>International Grains Arrangement</u>						
<u>and domestic sales</u>						
1 Northern	190/7	191/1	191	189	188/6	
2 Northern	185/3	185/5	185/4	185/4	185/2	
3 Northern	181	181/2	181/1	175	174/6	
4 Northern	175/7	176/1	176	169	168/6	
5 Wheat	169/7	170/1	170	167	166/6	
6 Wheat	162/7	163/1	163	160	159/6	
Feed Wheat	158/7	159/1	159	157	156/6	
1 C.W. Garnet	175/7	176/1	176	169	168/6	
2 C.W. Garnet	174/7	175/1	175	168	167/6	
3 C.W. Garnet	173/7	174/1	174	167	166/6	
1 Alberta Red Winter	175/7	176/1	176	169	168/6	
2 Alberta Winter	174/7	175/1	175	168	167/6	
3 Alberta Winter	173/7	174/1	174	167	166/6	
1 C.W. Amber Durum	221/3	221/5	221/4	210	209/6	
2 C.W. Amber Durum	219/3	219/5	219/4	208	207/6	
3 C.W. Amber Durum	208/4	208/6	208/5	197/1	196/7	
<u>(Basis in store Vancouver)</u>						
1 Northern	198/5	198/7	198/6	197/5	197/3	
2 Northern	194	194/2	194/1	194/1	193/7	
3 Northern	191/6	192	191/7	185/5	185/3	
4 Northern	185/2	185/4	185/3	179/5	179/3	
5 Wheat	183/2	183/4	183/3	177/5	177/3	
6 Wheat	177/2	177/4	177/3	170/5	170/3	
Feed Wheat	173/2	173/4	173/3	167/5	167/3	
1 C.W. Garnet	185/2	185/4	185/3	179/5	179/3	
2 C.W. Garnet	184/2	184/4	184/3	178/5	178/3	
3 C.W. Garnet	183/2	183/4	183/3	177/5	177/3	
1 Alberta Red Winter	185/2	185/4	185/3	179/5	179/3	
2 Alberta Winter	184/2	184/4	184/3	178/5	178/3	
3 Alberta Winter	183/2	183/4	183/3	177/5	177/3	

(1) July 28 to 31. (2) New prices effective August 1.

CANADIAN FLOUR MILLING SITUATION

Production Wheat flour production by Canadian mills during June 1969 amounted to 2,902,000 hundredweight representing a decrease of 12 per cent from the May 1969 total of 3,295,000 hundredweight, 13 per cent lower than the ten-year (1959-68) average production for the month of June of 3,325,000 hundredweight, but 1 per cent above the adjusted June 1968 figure of 2,873,000 hundredweight. Mills reporting operations during June 1969 had a total rated capacity of 173,000 hundredweight per 24-hour day and on the basis of a 25-day working period 68.4 per cent of this rated capacity was effective.

Wheat milled for flour during June 1969 amounted to 6,561,000 bushels, 12 per cent below the 7,464,000 bushels milled during the preceding month but 1 per cent over the 6,479,000 bushels milled during June 1968. Of the wheat milled for flour some 5,540,000 bushels were Western Canadian spring wheat (other than Durum) while the remainder consisted of Ontario winter wheat (626,000 bushels); Durum (316,000 bushels); and all other (79,000 bushels).

Exports According to preliminary Customs returns, exports of Canadian wheat flour during June 1969 amounted to the equivalent of 2,032,000 bushels (some 883,000 hundredweight of flour) 29 per cent higher than the May 1969 total of 1,572,000 bushels and 51 per cent greater than the adjusted June 1968 exports of 1,349,000 bushels. Flour shipments during the month went to forty-six countries with exports to Cuba amounting to 1,109,000 bushels and accounted for 55 per cent of the June total. Other principal markets for Canadian wheat flour in terms of wheat during the month with shipments in thousands of bushels were as follows: Lebanon, 228; Britain, 149; United States, 81; Leeward and Windward Islands, 79; Ghana, 54; and Trinidad and Tobago, 50.

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

Crop year	Wheat milled for flour bushels	Wheat flour	
		Production cwt.	Exports(1)
1935-36-1939-40 average	67,845,114	29,405,451	9,603,941
1940-41-1944-45 "	99,704,638	43,908,245	23,699,546
1945-46-1949-50 "	107,330,372	47,011,540	25,819,721
1950-51-1954-55 "	100,446,328	43,847,894	21,812,041
1955-56-1959-60 "	99,148,211	39,752,589	16,349,156
1960-61-1964-65 "	91,128,177	40,834,088	15,769,803
1965-66	97,925,995	43,531,263	16,576,117
1966-67	90,084,646	39,978,571	13,848,208
1967-68	84,769,150	37,755,841	10,734,857
1968-69(2)			
August	7,337,239	3,240,492	986,867
September	6,998,651	3,098,523	1,059,361
October	8,172,604	3,620,231	903,816
November	7,184,220	3,178,288	892,595
December	6,486,592	2,869,465	840,653
January	7,849,053	3,488,490	684,355
February	6,912,380	3,044,913	871,747 ^r
March	6,853,974	3,036,678	1,106,040
April	6,141,137	2,720,743	543,026
May	7,464,333	3,295,084	683,397
June	6,561,097	2,901,611	883,433
Totals	77,961,280	34,494,518	9,455,290 ^r
Same months 1967-68 ^r	77,414,108	34,487,203	9,892,881

(1) Based on Customs returns. Exports for the crop year 1945-46 - 1967-68 revised to remove effect of time lag in the returns made by Customs.

(2) Subject to revision.

^r Revised figures.

UNITED STATES SITUATION

Disappearance of During the crop year (July — June) 1968-69, total disappear-
United States Wheat ance (exports plus domestic use) of United States wheat
amounted to 1,300 million bushels, representing a decline of
8 per cent from the 1,409 million of 1967-68. Compared with the previous year's
total disappearance, the 1968-69 figures reflected lower exports as well as a
reduced quantity used for human food, which more than offset increases in the use of
wheat for feeding and seeding purposes. Preliminary data show that the 1968-69
exports of wheat, wheat flour and products in terms of grain equivalent amounted to
543.8 million bushels, some 29 per cent less than the 763.2 million exported in
1967-68. Domestic requirements increased from an estimated 645.7 million bushels
in 1967-68 to 756.2 million in 1968-69, the highest total since 1946-47.

With the 1968 production surpassing total disappearance into domestic and
export channels in 1968-69 by 21 per cent, year-end stocks increased from 539.4 million
at June 30, 1968, to 810.6 million bushels at the same date in 1969.

United States Wheat Supplies

Item	1967-68 ^r	1968-69 ^P
	million bushels	
Carryover at beginning of crop year (July 1)	425.0	539.4
Production	1,522.4	1,570.4
Total estimated domestic supplies	1,947.4	2,109.8
Imports of wheat and wheat flour in terms of wheat for domestic use, July — June	0.9	0.9
Total estimated supplies	1,948.3	2,110.7
Less estimated domestic requirements for crop year(1)	645.7	756.2 ^r
Available for export and for carryover	1,302.6	1,354.5
<u>Deduct</u>		
Exports of wheat as grain, July — June	700.3	471.3
Exports of wheat flour in terms of wheat, July — June(2) .	51.5	60.7
Exports of wheat products in terms of wheat, July — June	11.4	11.8
Total exports of wheat, wheat flour and products(3) ..	763.2	543.8
Balance on July 1 for export and for carryover	539.4	810.6

(1) Includes shipments to United States Territories and wheat for military food use
at home and abroad.

(2) Flour exports exclude "Milled in bond".

(3) Data include shipments for relief.

P Preliminary figures.

r Revised figures.

1969 Wheat Crop
Forecast at 1,425
Million Bushels

In a report released on July 10, 1969 the Crop Reporting Board of the United States Department of Agriculture stated that production of all wheat is forecast at 1,425 million bushels, 9 per cent less than the record large 1968 crop and 6 per cent less than in 1967. Changes in production estimates between the July 1 forecast and the final estimate have averaged 36 million bushels during the past decade, ranging from 8 to 74 million bushels. The indicated yield of 30.0 bushels per harvested acre is a new record and 1.6 bushels above last year's yield. Acreage of all wheat for harvest as grain is 47.5 million, 14 per cent below last year and lowest since 1963.

A winter wheat crop of 1,152 million bushels is now forecast, 6 per cent below last year's crop, and 1 per cent below a month earlier. Yield prospects improved in the Central and Southern Plains and Oregon but declined in Illinois and several western States. Harvested acreage was lower than earlier estimated levels, accounting for the lower production forecast. U.S. yield per acre is indicated at a record 31.5 bushels compared with 28.9 last year and 26.6 two years ago. Acreage for harvest as grain is expected to total 36.6 million acres, 14 per cent below last year and the lowest since 1963.

Harvest in Kansas started a few days later than normal and was interrupted frequently by rain so that combining was only 16 per cent complete by June 28. This was far behind the average of 52 per cent and last year's 37 per cent. Harvest in Oklahoma neared completion, except in the north central and north eastern areas where rain caused delays. Preliminary reports on quality from Kansas and Oklahoma indicate heavy test weight, a small percentage of grade defects but a lower protein content than a year ago.

Texas harvest was 78 per cent complete, 4 points below a year earlier. Harvest on the High Plains was slowed by wet fields where only about 58 per cent was harvested by July 1. Harvest in Nebraska is a week to 10 days later than usual. Only limited acreage had been harvested by July 1. Freeze damage was evident in the northwestern part of the State. Colorado prospects improved in June because above normal rainfall and cool temperatures provided excellent filling conditions.

Prospects declined considerably in Montana, where freezing temperatures about mid-June caught the crop in a critical stage in central counties of the State. Good rains received in June came too late to aid drought areas of southern Idaho and early harvest areas of Montana. Washington's wheat crop maintained relatively good yield prospects. Oregon's prospects improved during June—timely rains during critical filling period improved yield prospects.

Wet weather delayed harvest in Missouri where combining was 25 per cent complete compared to about 40 per cent last year. Illinois harvest was 5 to 10 per cent complete with progress limited to the two southern districts. Harvest is running later than normal in Indiana. Harvest in the Gulf Coast States progressed rapidly and was virtually complete by July 1. In the Carolinas and Virginia harvest was delayed by rain.

Spring wheat, other than durum, is estimated at 183.9 million bushels, 25 per cent less than last year and 26 per cent less than the 1967 crop. Production forecasts are down from last year in the major producing States of Minnesota, North Dakota, South Dakota and Montana.

Although spring wheat seeding began later than usual in the major growing areas, it was completed by near-normal dates. Dry weather in early June and short soil moisture slowed development but rains during the latter part of the month relieved dry soils and improved prospects considerably. Cool weather during most of June retarded growth and by July 1 maturity was behind normal. Yield is forecast at 24.2 bushels per harvested acre compared with 26.4 last year and 23.5 in 1967. Planted acreage of spring wheat, other than durum, is estimated at 7.8 million acres, compared with 9.5 million last year and 10.8 million in 1967. Harvested acreage is expected to total 7.6 million acres in 1969 compared with 9.3 million in 1968.

Production of durum wheat is forecast at 88.5 million bushels, down 9 per cent from last year's record crop but 33 per cent larger than the 1967 crop. Production in 1969 would be the second largest of record. The crop generally shows good to heavy stands. Although development has been slow, late June rains have been beneficial.

The 1969 crop will be harvested from 3.3 million acres, down 6 per cent from 1968. All Durum States showed decreases in acres for harvest in 1969 except South Dakota which increased 30 per cent. Yield is forecast at 26.5 bushels per harvested acre, compared with 27.4 last year.

Stocks of Wheat
in All Positions
July 1, 1969

On July 24, 1969, the United States Department of Agriculture reported that old crop carryover of all wheat on July 1 totalled 811 million bushels, 50 per cent more than a year earlier and the largest carryover stocks since July 1965. Farm holdings at 327 million bushels were record large for the date and 42 per cent above a year earlier. Off-farm stocks of 484 million bushels were 57 per cent above the previous year. July 1 stocks in all positions indicate disappearance during the crop year-- July 1, 1968 to June 30, 1969--of 1,299 million bushels compared with 1,408 million bushels the previous year and 1,422 million two years earlier. Of the total July wheat stocks, the Commodity Credit Corporation owned 159 million bushels, and had loans outstanding on another 465 million.

United States Wheat Stocks by Position, July 1, 1969 with Comparisons

Position	July 1, 1967	July 1, 1968	April 1, 1969	July 1, 1969
thousand bushels				
<u>All Wheat (old crop)</u>				
On farm (1)	145,479	230,379	462,299	326,949
Commodity Credit Corp. (2)	997	749	759	798
Mills, elev. & whses. (1)(3) ...	278,528	308,251	648,214	482,874
Totals	425,004	539,379	1,111,272	810,621
<u>Durum Wheat (4) (old crop)</u>				
On farms (1)	18,349	18,181	49,869	29,142
Commodity Credit Corp (2)	151	170	138	154
Mills, elev. & whses. (1) (3) ..	10,379	5,973	17,291	11,778
Totals	28,879	24,324	67,298	41,074

(1) Estimates of the Crop Reporting Board.

(2) C.C.C.-owned grain at bin sites.

(3) All off-farm storages not otherwise designated, including terminals and processing plants. Includes C.C.C.-owned grain in these storages.

(4) Included in all wheat.

Old crop durum wheat stocks in all storage positions on July 1 totalled 41.1 million bushels--69 per cent above a year earlier and the largest carryover since July 1966. Farm stocks at 29.1 million bushels were 60 per cent greater than last year. Off-farm stocks were nearly double those of a year earlier and 13 per cent above two years ago. July stocks indicate a disappearance of 80.9 million bushels during the crop year ended June 30, 1969, compared with 71.0 million a year earlier.

1970 Wheat
Program

On August 11, 1969 the Secretary of Agriculture Clifford M. Hardin announced a 1970 wheat program aimed at strengthening the U.S. position in world markets and at continuing the effort to bring wheat production into line with needs.

The 1970 program has five important features:

1. The national average price-support loan level will be \$1.25 per bushel. Unchanged from recent years, this level is being maintained in an effort to achieve maximum utilization of wheat through increased exports and continued large livestock feed use.
2. A diversion program at the maximum payment rate of 50 per cent of county loan rates is aimed at avoiding production of 80 to 90 million bushels of unneeded wheat. This feature will allow producers to tailor their plantings by diverting up to one-half of their acreage allotments while maintaining incomes through diversion payments.
3. The national wheat acreage allotment of 45.5 million acres is designed to reduce stocks and reverse the three-year upward trend in carryover levels. This is a 12 per cent reduction from the 1969 national allotment of 51.6 million acres. State by State wheat acreage allotments follow in this release.
4. Wheat marketing certificates will be paid on 48 per cent of the projected production on the allotted acres of participating producers. For 1969, certificates at a record \$1.52 per bushel are being paid on 43 per cent of projected production. They are adding more than \$800 million to the farm value of wheat. Payments per bushel reflecting the difference between wheat parity on July 1, 1970, and the average loan rate announced today will be as high or higher for the 1970 crop.
5. The option under which a producer can substitute the planting of wheat for feed grains or feed grains for wheat in any combination will be available. This increases farm efficiency by providing producers the flexibility of adjusting acreages to field sizes and of producing the more suitable crop for their particular operations.

In announcing the 1970 program, Secretary Hardin said, "There are areas of hopefulness for improved world wheat trade. Following recent sessions of the major exporters, we are moving toward recognition of our determination to maintain the U.S. share of world wheat trade. However, 1968-69 marketing year is the third consecutive one for reduced international trade, putting severe pressures on the world wheat industry. With surpluses piling up in the world's major exporting nations as a result of large crops in recent years, the U.S. cannot go on producing an excessive quantity of wheat which would only lead to larger and larger acquisition and storage costs. The wheat allotment announced today meets this problem squarely."

"Our carryover on July 1 this year was around 800 million bushels. In view of the 1969 U.S. crop prospects and the world wheat over-supply situation, it is likely there will be an additional buildup of U.S. stocks by July 1, 1970.

The 1970 allotment is aimed at securing a modest reduction of our national carryover. The 1970 program is expected to produce about 1,200 million bushels of wheat," the Secretary said.

Other features of the 1970 wheat program will be much the same as those for the 1969 crop.

Farmers signing up in the voluntary program can qualify for price-support loans, domestic marketings, certificates, payments for diverting acreage below their allotments, and alternative cropping options. If a farmer signs up in both the wheat and feed grain programs, one option can be substitution between wheat and feed grains acres. Another option is the overplanting of allotment acreages by one-half, with wheat from excess acres to be placed in secured storage until such time as it can be subsequently used because of underplanting or crop under production.

Whether barley will be included in the feed grain program in 1970 will be determined and announced later. However, required diversion for barley as a condition of substitution, under any circumstance, will be identical to the qualifying minimum acreage diversion required for feed grain program participation.

Small allotment farms with 1970 allotments 19.2 acres or less will be able to divert the entire allotment for payment. Payment will depend on diverted acreage being put to conserving or other specified use.

Substitution of wheat acreage for oats and rye acreage will be possible if a grower so requests and has a history of production of these crops in 1959-60. Required diversion from oats and rye will also be the same as that required under the 1970 feed grain program.

A farmer can become a 1970 wheat program co-operator in exactly the same way as in the 1969 program. He will need to sign up in the program; remain within his allotment (unless overplanting or substitution options are used); devote to conserving use an acreage equal to 30.3 per cent of his 1970 allotment (the approximate difference between the 1968 and 1970 allotments), as well as the acreage diverted for payment, and the acreage represented as normal conserving base. He needs also to remain within his acreage allotment for any other allotment crops on the farm, and within the permitted wheat acreage on any other farm in which he holds an interest.

Payments would be subject to any limitations that might be required by Congress in the Department of Agriculture appropriations.

Cash Wheat Prices on the Kansas City and Minneapolis Markets

No. 2 Hard Winter, Kansas City		No. 1 Northern Spring, Minneapolis(1)	
Date	Price	Date	Price
	cents per bushel		cents per bushel
July 1, 1969	129 1/4 - 133 1/2	July 1, 1969	151 1/4 - 201 1/4
2	127 1/2 - 134 1/4	2	151 3/8 - 202 3/8
3	129 3/4 - 130 1/4	3	153 1/2 - 204 1/2
4	Independence Day	4	Independence Day
7	129 - 178 1/4	7	154 5/8 - 205 5/8
8	129 1/4 - 154 1/4	8	154 1/8 - 205 1/8
9	128 1/2 - 141	9	154 1/8 - 206 1/8
10	127 - 141	10	153 3/4 - 206 3/4
11	128 3/4	11	154 3/4 - 208 3/4
14	130 - 169	14	154 7/8 - 209 7/8
15	128 1/2 - 168 1/2	15	155 3/8 - 210 3/8
16	127 1/2 - 160 1/2	16	155 5/8 - 210 5/8
17	128 - 154 1/2	17	155 7/8 - 210 7/8
18	128 - 146	18	156 - 206
21	Market closed	21	Market closed
22	128 1/4 - 149 1/4	22	153 3/8 - 200 3/8
23	128 - 142 1/4	23	152 5/8 - 198 5/8
24	128 - 159 1/2	24	149 3/4 - 197 3/4
25	127 - 135	25	147 1/8 - 197 1/8
28	126 3/4 - 144 1/2	28	146 1/8 - 196 1/8
29	125 3/4 - 156 1/2	29	146 - 196
30	131 1/4 - 169 3/4	30	147 1/2 - 199 1/2
31	129 1/2 - 147 1/2	31	147 3/4 - 201 3/4

(1) 11 to 17 per cent protein.

Chicago Wheat Futures, High Points of Closing

Date	July	September	December	March	May
	cents and eighths per bushel				
July 1, 1969	125	128/1	134/1	138/1	139
2	126	128/6	134/6	138/4	139/5
3	126/1	129/4	135/2	139	139/7
4		Independence Day			
7	128/1	131/1	136/6	140/3	141/2
8	127/5	130/3	135/7	139/7	140/6
9	128	130/3	136/1	139/7	140/7
10	128/4	130/7	136/3	140/2	141
11	127/5	130/4	136/1	140	140/6
14	125/4	129/2	135/3	139/3	140
15	125/3	128	133/7	138/3	139/1
16	126	128/4	134/4	138/1	138/7
17	126/2	129	134/7	138/4	139/3
18	127/4	130	135/6	139	139/3
21		Market closed			
22	126	129	134/7	138/4	139/1
23	127/5	133/3	137/2	137/4	135/4
24	126/3	132/3	136	136/3	134/1
25	125/4	131	134/7	135/3	133/2
28	121/2	126/6	130/4	131	128/6
29	122/7	127/7	131/7	132/4	130/3
30	124/4	129/4	133/2	134/2	131/7
31	123/6	128/6	132/5	133/4	131/5

AUSTRALIAN SITUATION

Wheat Supplies at Highest Level

Reflecting the effect of a sharp increase in production, which more than offset a substantial decrease in carryover stocks, total supplies of wheat in Australia for the 1968-69 crop year are estimated at 591.4 million bushels sharply above the 357.8 million in 1967-68. The 1968-69 harvest, estimated at an all-time high of 539.6 million bushels, nearly double the 277.4 million bushels harvested a year ago while carryover stocks, at 51.8 million bushels, are 36 per cent less than the 80.4 million at December 1, 1967. After deducting some 86.5 million bushels for anticipated domestic requirements, an estimated 504.9 million are available for export and for carryover during 1968-69, in sharp contrast to the 257.3 million in 1967-68.

Exports Decline From Previous Year

Combined exports of wheat as grain and wheat flour in terms of grain equivalent during the period December 1 — June 28 of the current Australian crop year amounted to 126.4 million bushels, some one per cent smaller than the 127.5 million exported during the corresponding seven months of the 1967-68 crop year. The balance remaining on June 29, 1969 for export and for carryover, at 378.5 million bushels, more than double the comparable 1968 total of 129.8 million.

Australian Wheat Supplies

Item	1967-68 ^r	1968-69 ^P
	million bushels	
Carryover, including flour as wheat, at beginning of crop year (December 1)	80.4	51.8
Production	277.4	539.6
Total estimated domestic supplies	357.8	591.4
Less estimated domestic requirements for crop year	100.5	86.5 ^r
Available for export and for carryover	257.3	504.9
<u>Deduct</u>		
Exports of wheat as grain, December 1 — June 28	116.4	116.1
Exports of wheat flour in terms of wheat, December 1 — June 28	11.1	10.3
Total exports of wheat and wheat flour	127.5	126.4
Balance on June 29 for export and for carryover	129.8	378.5

^P Preliminary figures.

^r Revised figures.

The following information relative to the Australian situation has been extracted from a report from Mr. F. P. Weiser, Commercial Counsellor for Canada, Canberra, under date of July 22, 1969 and is reproduced with the permission of the Trade Commissioner Service, Department of Industry, Trade and Commerce.

General. — There has been little change since the June report. There have been good rains in practically all wheat growing areas, as well as two to three weeks of fine weather. Accordingly, conditions for seeding have been good and most of the seeding has been completed. The estimate now stands at 25 1/2 million acres, only marginally below the area estimated at the time of the June report.

It is too early to estimate how the decision by Australia to reduce its efforts to sell wheat in overseas markets will affect the carry-over. This decision, announced by the Rt. Hon. John McEwen, Deputy Prime Minister and Minister for Trade and Industry, at the meeting of Ministers from major wheat exporting countries held in Washington on July 10 and 11, has given rise to much comment in the Australian press, mostly quoting farm leaders about their disappointment in this decision and speculating how it might affect the political fortunes of the Country Party of which Mr. McEwen is the leader. However, only the future will tell how Australian wheat stocks will be affected. The weather, too, has its part to play although it seems to be playing it well so far.

Following is the section in part on wheat in the opening address which the Hon. J.D. Anthony, Minister for Primary Industry, delivered to the Australian Agricultural Council meeting in Adelaide on July 8 and 9, 1969.

"The 1968-69 crop was a record 539.6 million bushels from a record acreage of 26.6 million acres. The previous biggest harvest was 465.6 million bushels in 1966-67 and the previous record for plantings was 22.4 million acres in 1967-68. The Australian crop passed the 300 million bushel mark for the first time in 1962-63.

In each of the mainland States the harvest exceeded previous record levels and in New South Wales, Queensland and Western Australia plantings were the highest ever. In these three States, particularly, there has been a tremendous expansion of the wheat industry over the last five years.

The Australian Wheat Board has received some 514 million bushels from the last crop. As it started the marketing year with a carryover of 51 million bushels it has been faced with unprecedented problems of marketing and storage.

Earlier in the season I made it clear to the industry that these problems would be compounded if there were another large crop at the end of this year. A carryover in excess of 250 million bushels was in prospect, and the Wheat Board would still owe more than \$200 million (\$241 million Canadian) on that wheat when most of next season's deliveries had been effected. This position remains unchanged.

In these circumstances the industry could not expect unlimited finance to be available to it and had to look to ways of at least avoiding a build-up of further problems.

It was not slow to react. In March the Australian Wheat Growers' Federation put forward proposals for quotas on deliveries. These have received wide publicity. On April 30 I was able to inform Parliament that the Federation's proposals for wheat delivery quotas had the full support of the wheat industry in all States and of all State Governments and the Commonwealth. I announced that as a measure of practical support of the proposals the Commonwealth Government had decided that it would guarantee finance to the Australian Wheat Board to enable the Board to pay a first advance of \$1.10 (\$1.33 Canadian) per bushel on wheat of the 1969-70 season delivered within the quotas established, not exceeding in aggregate 357 million bushels. I understand that each state has been proceeding towards the implementation of the quota

proposals for the 1969-70 season. The matter is listed for discussion at this meeting of Council.

The current marketing problems of the wheat industry in Australia are accentuated by the overseas situation. World production in 1968-69 attained a new record, major importing and exporting countries having harvested record or good crops. World trade this year has been declining, for the third year in succession.

Under these difficult circumstances the Australian Wheat Board has done very well in increasing its sales to some markets and in exploring new ones. Some of our traditional importers, notably India and Pakistan, have taken less as they have moved further along the road to self-sufficiency. In the latter country, particularly, there has been a dramatic increase in production as a result of the introduction of higher yielding varieties of wheat.

As a result of the supply situation overseas there has been considerable pressure on prices, and in a number of cases these have dropped below levels set by the International Grains Arrangement. This Arrangement was a substantial departure from the old International Wheat Agreements, and because of the supply and price situation in the first year of its operation it has been under considerable stress. Numerous difficulties have had to be faced. Some have been resolved; others are still proving troublesome. Australia is doing what it can, both in the International Wheat Council and in consultations with other exporters, to ensure the future viability and effectiveness of the Arrangement.

Another major factor affecting the market outlook for the coming year will be the size of the harvest in the Northern Hemisphere. It is early as yet to obtain adequate information on this. There have, however, been intentional reductions in plantings in U.S.A. and Canada, while in Europe unfavourable weather conditions have reduced plantings and crop prospects. In general, early indications are for a reduced Northern Hemisphere harvest.

Generally, conditions for sowing the 1969-70 season's crop in Australia have been favourable. While it is too early for any accurate assessment of the acreage sown to be available, preliminary reports indicate that there may be no significant reduction from last season's record level. If seasonal conditions result in high yields, the delivery quota arrangements will become of paramount importance.

Wheat growers have shown over the years that they are in favour of orderly marketing through the Wheat Board and of the stabilisation arrangements which their leaders have negotiated for them. It is up to growers to stand behind their leaders and the Board to ensure that the arrangements which have worked so well for them in the past continue to operate with full support".

Wren variety of wheat. - Dr. Allan Callaghan, Chairman of the Australian Wheat Board, said on July 6 that the decision not to adopt wren wheat as a recommended variety would protect growers' interests. His statement was in reply to criticism of Mr. Anthony and the Wheat Board after the Commonwealth police had investigated unauthorized sales of wren wheat.

He said that the decision not to adopt wren wheat was taken on the advice of the Board, The Australian Bread Research Institute and the New South Wales Flour Millers Council. The wheat is soft and of inferior milling quality.

Exports of Australian Wheat and Wheat Flour in Terms of Wheat
December 1 — June 28, 1968-69 and Corresponding Period 1967-68

Destination	Wheat		Wheat flour	
	1967-68	1968-69	1967-68	1968-69
thousand bushels				
<u>Western Europe</u>				
EEC:				
Belgium	126	—	—	—
Germany, Federal Republic ..	72	1,429	—	—
Netherlands and I/T	2,393	4,851	—	—
Sub-totals	2,591	6,280	—	—
<u>Other Western Europe</u>				
Britain	14,501	17,851	242	231
Ireland	1,075	404	—	—
Malta	392	561	—	—
Norway	1,355	3,648	—	—
Sweden	—	15	—	—
Switzerland	10	107	—	—
Sub-totals	17,333	22,586	242	231
Totals	19,924	28,866	242	231
<u>Africa</u>				
Malawi	—	—	191	216
Mauritius	—	—	292	499
Rhodesia	2,097	1,575	—	—
Sudan	422	—	—	—
Zambia	1,112	1,028	105	—
Others	7	8	78	262
Totals	3,638	2,611	666	977
<u>Asia</u>				
Aden	600	386	—	—
Aden and Aden I/T	—	—	184	124
Aden and Aden I/T Atta	—	—	117	48
Afghanistan	—	367	—	—
Arabian Gulf	—	—	29	86
Arabian Gulf Atta	—	—	368	381
Ceylon	4	938	4,607	3,976
China	42,197	27,452	—	—
Hong Kong	2,889	1,376	36	20
India	7,550	1,130	—	—
Indonesia	—	—	2,056	1,345
Iraq	2,305	—	—	—
Japan	13,622	29,847	—	—
Korea South	—	369	—	—
Kuwait	1,540	1,506	—	—

Exports of Australian Wheat and Wheat Flour in Terms of Wheat
December 1 — June 28, 1968-69 and Corresponding Period 1967-68

Destination	Wheat		Wheat flour	
	1967-68	1968-69	1967-68	1968-69
thousand bushels				
<u>Asia (concluded)</u>				
Lebanon	861	2,264	—	—
Malaysia	6,833	3,708	—	—
Pakistan	—	868	—	—
Philippines	305	655	64	94
Sabah	—	—	14	17
Sarawak	—	—	16	10
Saudi Arabia	38	1,041	179	485
Singapore	6,523	1,903	1	1
Taiwan	771	1,450	—	—
Thailand	817	995	152	115
Others	282	445	65	79
Totals	87,137	76,700	7,888	6,781
<u>Oceania</u>				
New Zealand	916	—	—	—
<u>Western Hemisphere</u>				
Chile	2,692	2,442	—	—
Colombia	—	1,293	—	—
Peru	2,045	4,150	—	—
West Indies Area	—	—	332	135
Totals	4,737	7,885	332	135
<u>Pacific Area and Sundries</u>				
Pacific Islands	48	36	1,887	2,086
Ships' Stores and Sundries ...	—	—	85	90
Totals	48	36	1,972	2,176
Totals, all countries	116,400	116,100	11,100	10,300

ARGENTINE SITUATION

Supplies Above
Previous Year

Total estimated supplies of wheat in Argentina for the 1968-69 (December — November) crop year are placed at some 261.2 million bushels some 8 per cent below the previous season's total of 285.3 million. Current crop year supplies consist of the December 1 carryover of 44.4 million compared with 16.4 million the year before, while the 1968 production, at 216.8 million, registered a decrease from the 269.0 million harvested in 1967. After making an allowance of 150.6 million for anticipated domestic requirements, an estimated 110.5 million are available for export and for carryover in 1968-69, some 13 per cent less than the 127.5 million the previous year.

Exports Increase Slightly Preliminary exports of wheat and wheat flour in terms of wheat equivalent during December 1968 — June 1969 amounted to 65.7 million bushels, 16 per cent above the 56.6 million exported during the same seven months in 1967-68. The balance remaining on July 1, 1969 for export and for carryover was estimated at 44.9 million bushels, in sharp contrast to the July 1, 1968 total of 70.9 million.

Argentine Wheat Supplies

Item	1967-68 ^r	1968-69 ^P
	million bushels	
Carryover at beginning of crop year (December 1) (1)	16.4	44.4
Production	269.0	216.8
Total estimated domestic supplies	285.3	261.2
Less estimated domestic requirements for crop year	157.8	150.6
Available for export and for carryover	127.5	110.5
<u>Deduct</u>		
Exports of wheat as grain, December — June	55.7	63.7
Exports of wheat flour in terms of wheat, December — June	0.9	2.0
Total exports of wheat and wheat flour	56.6	65.7
Balance on July 1 for export and for carryover	70.9	44.9

(1) Includes allowances for farm stocks.

^P Preliminary figures.

^r Revised figures.

The following account of the Argentine situation has been extracted from a report from Mr. S.E. Kidd, Assistant Commercial Secretary (Agriculture) Buenos Aires, under date of July 24, 1969 and is reproduced with the permission of the Trade Commissioner Service, Department of Industry, Trade and Commerce. Where possible conversions to Canadian measures and currency have been made for the convenience of our readers.

Wheat imports. — On June 18, the National Grain Board issued a tender for the purchase of 200,000 metric tons (7,349,000 bushels) of bread wheat for shipment between July 15 and September 15. On June 26, the National Grain Board purchased 50,000 metric tons (1,837,000 bushels) of N.S.W. Northern F.A.Q. wheat from Australia under this tender at an f.o.b. price of US\$ 55.32 per metric ton (\$1.63 per bushel) for delivery July 15 to August 15.

On June 27, a second tender was issued calling for offers on 100,000 tons (3,674,000 bushels) of bread wheat for shipment between July 15 and August 31 and 100,000 tons (3,764,000 bushels) for shipment during September. Argentina purchased 75,000 tons (2,756,000 bushels) of U.S.S.R. type 441 wheat f.o.b. Novorossisk at a price of US\$ 58.79 per metric ton (\$1.73 per bushel).

A third tender was issued on July 7 for the importation of a further 50,000

tons (1,837,000 bushels) of wheat between July 25 and August 31. On July 11, it was announced that 50,000 tons (1,837,000 bushels) of Mexican wheat would be purchased at an f.o.b. price of U\$S 48.89 per metric ton (\$1.44 per bushel).

The National Grain Board has been authorized to purchase up to a total of 400,000 tons (14,697,000 bushels) of wheat and have purchased 175,000 tons (6,430,000 bushels) so far. There is still some doubt as to whether or not Argentina can fully meet its domestic and export commitments unless further imports are made. Thus, there is a possibility that yet another tender may be issued fairly shortly for wheat to be delivered during October to supply the requirements of the millers until the current crop is harvested.

1969-70 wheat crop. — By the end of June, about 50 per cent of the wheat crop had been sown. There were rains throughout most of the grain area during June and although temperatures fluctuated over a wide range, there were very few frosts and no damage was reported from either frost or plagues in the areas where wheat has been sown.

The sowing of wheat is now almost completed, although it has been delayed, particularly in the south of the province of Buenos Aires, by very heavy rains which have caused flooding in some areas. The northern areas, on the other hand, have not had adequate rains.

The marginal wheat producing zones of the northern provinces of El Chaco, Formosa, Santiago del Estero and the north of Santa Fe are suffering from a lack of moisture and the outlook for the development of the crop in these areas is poor.

In Entre Rios, southern Santa Fe and northern Buenos Aires the seeding has been delayed and it is likely that corn and sorghum will displace a good part of the area normally sown to wheat.

In the central area of the province of Buenos Aires excessive moisture appears to have ruined seeds in some areas and these areas may be resown to maize and sorghum.

In southern Buenos Aires province, there are few alternatives to the planting of wheat and it is likely that, if bread wheat sowings are delayed very much longer, the farmers will sow Durums wherever possible. Durum sowings are expected to be significantly greater than last year in any event.

The situation in the province of Cordoba is very difficult to judge at this stage of the crop year but it is expected that the area seeded to wheat will be about the same as last year.

It is generally thought that the total area sown to wheat will be about 6.4 million hectares (15.8 million acres) compared to the 6.7 million hectares (16.5 million acres) sown last year. About 500,000 to 600,000 hectares (1.2 million to 1.5 million acres) of this area are expected to be planted to Candéal and Taganrock (Durum) varieties. If growing conditions are normal, about 5.6 million hectares (13.8 million acres) could be harvested and between 6.5 million to 7 million metric tons (238.8 million to 257.2 million bushels) produced. Production on this scale would be necessary if Argentina is to meet its traditional export commitments.

Export sales. — Argentina has negotiated the third contract under their agreement with Brazil to supply one million metric tons (36,743,000 bushels) of wheat

during 1969. The third contract is for a quantity of 250,000 metric tons (9,186,000 bushels), 10 per cent more or less, for shipment from July to September. It is unofficially reported that the agreed price for this lot was U\$S 58.00 per metric ton, (\$1.75 per bushel), f.o.b. Buenos Aires.

It is reported by the trade that a considerable volume of 1969-70 crop Durums have been sold to Italy for delivery early next year.

Prices. — The speculative rise in wheat prices was checked on June 13 by the announcement of the Government's intention to import.

Hard wheat prices, f.o.r. Buenos Aires, at June 30 had settled to 1,740 pesos per 100 kilos (\$1.46 per bushel) and were steady at this level up to July 23.

Prices at Bahia Blanca had settled to 1,720 pesos per 100 kilos (\$1.44 per bushel) at the end of June after rising to a high of 1,740 pesos (\$1.46 per bushel) during the month. Prices at Bahia Blanca were also stable during July.

The level of prices on the Buenos Aires Futures Exchange returned to more normal levels. On July 23, the quotations were 1,785 pesos per 100 kilos (\$1.50 per bushel) for August delivery; 1,810 pesos (\$1.52 per bushel) for September and 1,820 pesos (\$1.53 per bushel) for October.

Candeal (Durum) prices f.o.r. Buenos Aires fell from 2,300 pesos to 2,170 pesos per 100 kilos (\$1.93 per bushel to \$1.82 per bushel) during June and were maintained at this level up to July 23. At Bahia Blanca, Candeal prices fell from 2,220 pesos to 2,100 pesos per 100 kilos (\$1.86 per bushel to \$1.76 per bushel) during June and were stable at this level up to July 23.

Argentine Wheat Exports December — May 1967-68 and 1968-69

Destination	May		December-May	
	1968	1969	1967-68	1968-69
thousand bushels				
<u>Western Europe</u>				
EEC:				
Belgium	—	—	176	1,204
France	—	—	1,148	647
Germany, Federal Republic ..	15	—	33	37
Italy	1,004	688	12,295	11,744
Netherlands	—	124	853	2,720
Sub-totals	1,019	812	14,505	16,352
<u>Other Western Europe</u>				
Britain	—	382	1,609	4,363
Denmark	—	—	16	—
Norway	—	—	37	486
Portugal	—	—	376	—
Sweden	29	—	29	—
Switzerland	—	—	7	355
Sub-totals	29	382	2,074	5,204
Totals	1,048	1,194	16,579	21,556

Argentine Wheat Exports December — May 1967-68 and 1968-69

Destination	May		December-May	
	1968	1969	1967-68	1968-69
thousand bushels				
<u>Eastern Europe</u>				
Hungary	—	—	22	—
<u>Africa</u>				
Algeria	—	—	351	869
<u>Asia</u>				
China, Communist	—	—	370	—
Cyprus	—	—	—	472
India	—	—	—	4,364
Japan	—	—	—	527
Mozambique	—	—	—	426
Turkey	—	456	—	456
Viet-Nam	184	—	184	—
Totals	184	456	554	6,245
<u>Western Hemisphere</u>				
Bolivia	73	116	720	239
Brazil	5,477	2,565	9,593	18,680
Chile	37	—	1,470	2,408
Colombia	—	—	1,521	—
Paraguay	—	133	1,297	1,454
Peru	364	413	7,133	6,710
Uruguay	—	—	513	—
Totals	5,951	3,227	22,247	29,491
Totals, all countries	7,183	4,877	39,755	58,161

GRAIN SITUATION IN BRITAIN

The following account of the current crop situation in Britain has been extracted from a report by Mr. G.D. Cooper, Commercial Assistant, London, under date July 22, 1969, and is reproduced with the permission of the Trade Commissioner Service, Department of Industry, Trade and Commerce.

Weather and crops. — In the latter part of June, warm sunny spells interspersed with periods of moderate to heavy rain helped to make up some of the leeway caused by poor sowing conditions in the early spring. During July very warm dry sunny weather has prevailed and accelerated growth of all crops and there has already been some harvesting of barley in Southern England.

Both autumn and winter sown cereals have made good progress, but on heavier

land crops still tend to be thin and patchy, especially in those areas affected by the exceptional rainfall in May. On such land, crops of winter wheat are still showing the effects of earlier waterlogging and pest damage, but overall there is a marked improvement and many crops are in ear. Mildew has been widespread, but not generally severe and the incidence of loose smut is higher than usual. The majority of spring wheat remains rather backward and uneven, especially where late sown, but there has, nevertheless, been a marked improvement.

Outlook. — The very bad weather of autumn and spring is likely to reduce the total acreage sown to cereals. According to returns by the Agricultural Authorities, it was anticipated that by June 4, 1969, a total of 9.16 million acres of cereals would be sown, some 150,000 acres less than the previous year. The acreage of wheat was expected to be reduced by around 300,000 acres with the barley acreage increased by 50,000 acres approximately and oats up by 100,000 acres. The exceptionally poor weather conditions however, could imply that around 100,000 acres, of intended sowings will not take place. Consequently, a lower barley crop is anticipated.

Serious delays in sowing have been caused by the adverse weather, the rate of growth of cereals has been retarded and the growth of weeds has been unable to be controlled, as the state of the land has made the spraying of herbicides difficult.

The extremely late sowings in many areas could mean a prolonged harvest and the poor sowing conditions could indicate lower than average yields. On balance therefore, the prospect of a large harvest in 1969-70 cannot be optimistic.

It is expected that a higher livestock population in 1969-70 will cause an increase in the demand for cereals of around 500,000 long tons above the 1968-69 figure, but requirements for export, as in the previous year, are expected to be negligible.

Unless yields are exceptional, the wheat crop will be less than last year, but there are hopes that its' quality may be better and in which case, it will not compete to the same extent with home grown barley in the feed market.

Stocks of grain on farms. — The Ministry of Agriculture has announced that stocks of grain on farms in Great Britain, as at the end of May 1969 are estimated at 950,000 long tons, comprising wheat 380,000 (14,187,000 bushels), barley 510,000 (23,800,000 bushels), and oats 70,000 (4,612,000 bushels), compared with 330,000 (12,320,000 bushels), 630,000 (29,400,000 bushels), and 120,000 (7,906,000 bushels), respectively, for the previous year.

Cereals deficiency payments. — The Ministry of Agriculture has announced that the advance deficiency payment on wheat for the eighth accounting period for the cereal year 1968-69 (i.e. for the month of April 1969) will be 5s 2d per long cwt (36 cents per bushel). An amount of 2.6d per cwt (1.3 cents per bushel) will be deducted in respect of the levy from the Home Grown Cereals Authority.

Intake by processors. — The National Association of British and Irish Millers have announced that their target figure for the intake of home-grown wheat for the cereal year 1969-70 will again be 1.5 million long tons (56.0 million bushels) notwithstanding the smaller acreage planted and below average growing conditions. Provided there are good harvesting conditions and regularity of supplies throughout the year, this target figure could, in fact, be exceeded.

The millers have so far taken 1.39 million long tons (51.9 million bushels), but

will be unable to reach their 1.5 million long ton (56.0 million bushels) target for usage of home grown wheat in the cereal year now ending. Owing to the disastrous 1968 harvest, the millers have purchased wheat which has produced in volume, up to 6 per cent less flour of a suitable colour than usual and up to 6 per cent more offal which sold at a much reduced price.

The quantity of domestic wheat actually used for flour is expected to rise in the future provided processors can obtain usable home grown supplies at a cheaper price than it can be imported. Technical developments are also promising and it is expected that in the years to come, millers will be less dependent than previously on imported hard grains.

Compounders utilized a record quantity of well over four million long tons of home grown cereals from the 1968-69 harvest, despite a much smaller crop and a larger tonnage retained on farms for livestock feed. The balance of their requirements, over three million long tons, was made up from imported supplies. Prospects for the 1969-70 crop indicate that large quantities of imports will be necessary, but with the protection of minimum import prices all home-grown grain on offer from the 1969 harvest should find a ready market provided prices are competitive.

Minimum import price and levy arrangements. — Recent provisions in the minimum import price and levy arrangements include increases in the prospective rates of country levies on certain wheats grown in specified Continental countries and similar increases in the prospective rates of general levies.

The country levy on Canadian barley of 30s 0d per long ton (8.5 cents per bushel) has been extended for the period through to December 1969. The prospective rate of general levy on barley is also similarly extended.

Grain markets. — Trade in markets for both imported and home-grown grains has been rather limited. In the domestic market this is only to be expected at this time of the year with the harvesting of the new crop only just about to begin.

There has been little interest in remaining old-crop supplies with domestic hard milling wheats at 24s 3d to 25s 3d per long cwt (\$1.69 to \$1.76 per bushel), 24s 0d to 25s 0d per long cwt (\$1.68 to \$1.75 per bushel) for semi-hard and soft; and 22s 0d to 23s 0d per long cwt (\$1.54 to \$1.61 per bushel) for feed.

There has been some interest in Continental feed wheat, but buying of milling wheats has been restricted by uncertainties in the world market although some Canadian Manitobas have been purchased on transshipment. There was also trade in U.S. maize for August-September shipment.

New crop guide prices based on the latest information and after adjusting competing imported grain prices to a comparable ex-farm basis are currently announced at £22 15 0d and £20 5 0d per long ton (\$1.59 and \$1.13 per bushel) ex-farm for millable wheat and feeding barley, respectively, for August-September delivery.

CALENDAR OF WHEAT EVENTS

- July 10 According to a report published by the Crop Reporting Board, United States Department of Agriculture, all wheat production in the United States in 1969 is forecast at 1,425 million bushels, 9 per cent below the record large 1968 crop and 6 per cent less than in 1967.
- 22 A report received from Mr. F.P. Weiser, Commercial Counsellor, Canberra, stated in part that there have been good rains in practically all wheat areas of Australia, as well as two to three weeks of fine weather. Conditions for seeding have been good and most of the seeding has been completed.
- 24 In a report received from Mr. S.E. Kidd, Assistant Commercial Secretary (Agriculture) for Canada, Buenos Aires, the sowing of wheat is now almost completed in Argentina, although it has been delayed, particularly in the south of the province of Buenos Aires, by very heavy rains which have caused flooding in some areas. The northern areas, on the other hand, have not had adequate rains.
- August 1 In a joint statement by the Honourable Jean-Luc Pepin, Minister of Industry, Trade and Commerce, and the Honourable H.C. Olson, Minister of Agriculture it was announced that the initial payment for wheat effective August 1, 1969, would be \$1.50 per bushel, basis No. 1 Manitoba Northern in store Fort William-Port Arthur or Vancouver.

Total wheat acreage in Canada in 1969, estimated at 25.0 million acres, is 15 per cent smaller than last year's 29.4 million.

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