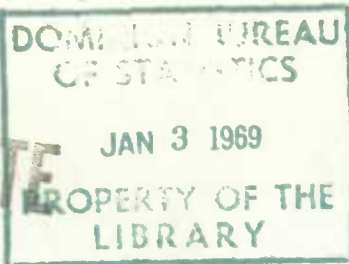


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# The Wheat Review

NOVEMBER 1968



**DOMINION BUREAU OF STATISTICS**

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DOMINION BUREAU OF STATISTICS

Agriculture Division

Crops Section

## THE WHEAT REVIEW

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# WORLD WHEAT SITUATION

## August-October Exports Lower than Previous Year

Total exports of wheat and wheat flour in terms of grain from the four major exporting countries during the August-October period of the current Canadian crop year amounted to 289.0 million bushels, a decrease of 17 per cent from the 347.9 million exported during the same three months in 1967 and 13 per cent below the ten-year (1957-66) average shipments for the first quarter of the crop year, of some 330.6 million bushels. As indicated in the accompanying table, based on the Canadian crop year, United States and Australia's shipments were at lower levels this year than last while Canada and Argentina were higher.

Shipments from these same four countries during August-October 1968 with comparisons appear in the accompanying table.

## Exports of Wheat and Flour in Terms of Wheat, August-October 1968 with Comparisons

August-October	United States	Canada	Argentina	Australia	Total
million bushels					
1950 .....	51.4	49.3	17.2	30.9	148.8
1951 .....	116.0	75.4	17.9	30.5	239.8
1952 .....	85.1	94.6	-	23.0	202.7
1953 .....	54.8	79.2	32.5	16.6	183.1
1954 .....	53.8	73.8	33.7	21.5	182.8
1955 .....	54.4	60.1	30.2	23.2	167.9
1956 .....	118.8	81.4	24.2	40.9	265.3
1957 .....	100.7	73.5	21.8	24.9	220.9
1958 .....	108.2	73.8	21.4	16.2	219.6
1959 .....	100.3	76.3	15.1	20.4	212.1
1960 .....	150.8	81.8	25.5	27.7	285.8
1961 .....	180.0	106.2	6.1	55.9	348.2
1962 .....	140.2	84.7	8.7	23.2	256.8
1963 .....	192.1	139.6	12.7	47.3	391.7
1964 .....	185.5	133.8	26.6	37.4	383.3
1965 .....	203.4	181.5	70.5	56.2	511.6
1966 .....	243.1	172.0	19.4	41.3	475.8
1967 <sup>r</sup> .....	197.2	71.1	5.3	74.3	347.9
1968 <sup>p</sup> .....	123.4	94.0	19.5	52.1	289.0

<sup>p</sup> Preliminary figures.  
<sup>r</sup> Revised figures.

## Wheat Supplies of Four Major Exporters Above a Year Ago

Latest available estimates indicate that supplies of wheat remaining on or about November 1, 1968 in the four major exporting countries, for export and for carryover at the end of their respective crop years, amounted to 2,454.9 million bushels, about 17 per cent more than the 2,098.4 million available a year ago. Supplies on or about November 1, 1968, in millions of bushels, were held as follows, with last year's comparable figures in brackets: United States, 1,276.1 (1,040.1); Canada, 1,058.4 (932.1); Argentina, 57.6 (13.7); and Australia, 62.8 (112.5).



World Wheat            The following is taken from the report on Grains and Feeds as  
Situation            prepared for the Federal-Provincial Agricultural Outlook Conference,  
and Outlook           November 25 and 26, 1968.

Situation            World wheat production (excluding Mainland China) reached 10,200 million bushels in 1967-68, 2 per cent less than the record crop harvested in the previous year, but 10 per cent above the 1961-62 to 1965-66 five-year average. After a decline in beginning carryover stocks over a period of years, which reached a low in 1966-67, they increased 8 per cent in 1967-68 in the five major exporting countries (U.S.A., Canada, Australia, Argentina, and France) to 1,161 million bushels. With increased supplies in most importing countries, world trade declined for the second consecutive year to a level of about 1,950 million bushels.

The decline in import demand, beginning in 1966-67, continued into 1967-68 and increased supplies in the major exporting countries led to intensified export competition in world markets. Commercial exports from the United States fell slightly, but increased shipments on special terms pushed total United States exports to an estimated 20 million bushels above the previous year and 12 million bushels above the 1967-68 export target of 750 million bushels. While Australian exports are expected to be down 96 million bushels to 220 million bushels, ample carryover stocks from the bumper 1966-67 crop cushioned the effect of a poor 1967-68 harvest. Argentine exports, temporarily suspended in 1967 because of a shortage of supplies, are expected to be little changed from the previous year at 85 million bushels. French exports increased 54 million bushels to 169 million bushels due to a larger crop and higher export subsidies, especially to more distant markets. Canadian exports were down by 179 million bushels to 336 million.

International wheat prices, which had begun to fall in the latter months of the 1966-67 season, continued to fall throughout the first half of 1967-68 reflecting the bearish world trade situation. Prices began leveling off early in 1968 and in March 1968, export prices of most wheats averaged about 10 per cent lower than the previous year. The decline was less pronounced in import markets due to a moderate rise in freight rates with the closing of the Suez Canal in June 1967.

For the first time since 1949 wheat was traded for most of the 1967-68 season without an internationally agreed price range. The price provisions of the 1962 International Wheat Agreement lapsed in August 1967 and the new price range of the 1967 International Grains Arrangement became effective on July 1, 1968. The new minimums are at a level roughly equivalent to the average world market prices during the previous five years. For part of 1967-68, wheat prices were below this level, but prior to the date of implementation the major exporters took action to ensure that the price provisions of the I.G.A. would be honored.

Outlook            Opening stocks for the current season in the five main exporting countries are estimated at 1,348 million bushels, 16 per cent larger than last year. Stocks are up sharply in Canada and the United States, up slightly in France and Argentina and down slightly in Australia.

Present indications suggest a world harvest (excluding Mainland China) of about 10,000 million bushels or a little less than the two previous years, but 9 per cent above the 1961-62 to 1965-66 five-year average of 9,200 million bushels. The total crop in Western Europe is estimated to be down slightly from the last



two years, with reduced yields more than offsetting increased acreage. Heavy rain damage to grain crops in Britain affected the quality and volume of production. However, the French harvest is expected to be equal to the near record level last year of 537 million bushels. Reports indicate a reduced level of production in Eastern Europe due to drought in some areas; and less than favourable weather in the U.S.S.R. may hold production in that country near the 1967 level of 3,000 million bushels. Little information is available on the harvest situation in Mainland China. The North African harvest is expected to be better than last year. Turkey and Iran have harvested bumper crops but production is down slightly in other Middle East countries. Both India and Pakistan have harvested record crops, each 39 per cent larger than last year. Excellent weather was the key factor together with improved seed, heavier application of fertilizer and better cultural practices. The 1968 acreage allotment in United States was cut back to 59.3 million acres from the high level of 68.2 million acres in 1967. However, a record average yield of 28.3 bushels per acre is estimated to have increased production 4 per cent to 1,588 million bushels. In the southern hemisphere, crops are not yet harvested, but it is estimated that Australian producers planted a record 25 million acres and with reported above average weather conditions, production is expected to approach the record 1966-67 crop of 463 million bushels. If the three-year drought breaks in Argentina, the 15 million acres apparently planted could bring a substantial increase in production over the last few years. It is presently estimated that the five major exporting countries will harvest crops in excess of the 1966 record of 3,250 million bushels. However, the final outcome will not be known until late December when crops are harvested in the southern hemisphere.

World trade in wheat continued to be slow in the early months of the current season but is expected to be equal to or slightly larger than last year's 1,950 million bushels. Lower levels of production in some importing countries are expected to lead to a slightly improved import demand in 1968-69. Increased carry-over stocks in exporting countries, combined with a record harvest will provide ample exportable supplies in 1968-69. Hence the intense competition among exporters in wheat markets which characterized world wheat trading in 1967-68 is expected to continue in 1968-69 with resulting pressure on world wheat prices. Nevertheless, the International Grains Arrangement will provide a floor at which world prices can be maintained.

The patterns of world trade established in 1967-68 are expected to continue in 1968-69 with only a few significant variations. Exports to developed countries which have been declining in recent years, may continue to decline with increased purchases by Japan more than offset by reduced shipments to Western Europe and South Africa. The developing countries will continue to require wheat to meet their food grain needs and for stock replenishment but as in previous years, their imports will depend largely on aid commitments and other concessional supplies. However, technological advances have enabled many of the developing countries to markedly increase their own grain production. There are indications that the drought which has affected production in some of the East European countries may lead to increased imports by some of these countries from the west, but this will depend largely on the level of exportable supplies in the U.S.S.R. However, Mainland China may continue to require large wheat imports in 1968-69.

CANADIAN SITUATION

Supplies Above Total estimated supplies of wheat for the 1968-69 (August-July)  
Previous Year crop year are placed at 1,317.4 million bushels consisting of  
the August 1 carryover of 667.5 million and the 1968 crop,  
estimated on the basis of conditions at October 15 at 649.8 million bushels.  
Supplies of the size indicated represent an increase of 13 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 1,152.4 million bushels, 15 per cent more than the 1,003.2 million in  
1967-68.

August-October Exports Exports of wheat and flour, in terms of wheat equiva-  
Higher than Previous Year lent, during August-October 1968 amounted to 94.0  
million bushels, 32 per cent more than the 71.1 million  
exported during the same three months of 1967. This year's exports consisted of  
87.1 million bushels of wheat in bulk, 46 thousand of seed and 6.8 million of flour  
in terms of wheat. During the August-October period last year these figures were  
64.5 million of wheat in bulk, 179 thousand of seed and 6.4 million of flour in  
wheat equivalent. The balance remaining on November 1, 1968 for export and for  
carryover amounted to 1,058.4 million bushels, 14 per cent above the November 1, 1967  
total of 932.1 million.

Canadian Wheat Supplies

Item	1967-68 <sup>r</sup>	1968-69 <sup>p</sup>
	million bushels	
Carryover in North America at beginning of crop year (August 1) .....	576.8	667.5
Production .....	592.9	649.8(1)
Total estimated supplies .....	1,169.7	1,317.4
Less estimated domestic requirements for crop year .....	166.5	165.0
Available for export and for carryover .....	1,003.2	1,152.4
<u>Deduct</u>		
Exports of wheat in bulk, August - October (2) .....	64.5	87.1
Exports of seed wheat, August - October (3) .....	0.2	(4)
Total exports of wheat as grain .....	64.7	87.2
Exports of wheat flour in terms of wheat, August - October (3) .....	6.4	6.8
Total exports of wheat and wheat flour .....	71.1	94.0
Balance on November 1 for export and for carryover .....	932.1	1,058.4

(1) Based on November forecast of production.

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

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

(4) Less than 50,000 bushels.

P Preliminary figures.

r Revised figures.



Marketings, Disappearance  
and Visible Supplies

Total primary deliveries of wheat (both east and west) up to November 20 of the current crop year have amounted to 116.5 million bushels compared with 143.7 million marketed during the same period of the previous year. Some 52.5 million bushels of this year's total were delivered during the four weeks October 24 to November 20. During the same period the volume of Canadian wheat entering domestic and export channels amounted to 28.3 million bushels. As a result, the total visible supply of Canadian wheat increased from 392.4 million at October 23 to a level of 415.7 million at November 20, 1968.

The total visible supply of Canadian wheat at November 20 this year represented a 3 per cent increase over the 1967 comparable total of 403.1 million and was 49 per cent above the 1966 figure of 278.2 million. Country elevator stocks, amounting to 252.6 million bushels, were 10 per cent above the 1967 comparable total of 229.6 million, and 70 per cent more than the 148.9 million of two years ago. Wheat stocks at interior terminals at November 20, 1968, totalled 12.3 million bushels slightly lower than the 12.5 million a year ago but considerably above the 1.8 million of two years ago. The 14.9 million bushels "in transit rail" (western division) were 14 per cent below the 1967 figure of 17.4 million and relatively unchanged from the 15.0 million in this position in 1966. Supplies at the Lakehead, totalling some 35.7 million bushels, registered a decrease from last year's comparable level of 40.3 million but were considerably higher than the 22.6 million of 1966. Stocks "in transit lake", amounting to 9.2 million bushels were higher than the 1967 level of 8.6 million but 14 per cent below the 1966 figure of 10.7 million. The 32.3 million bushels in Bay, Lake and Upper St. Lawrence ports were lower than the 34.2 million of a year ago but above the 27.8 million of two years ago. Supplies in Lower St. Lawrence and Maritime ports at November 20, 1968, at 37.1 million bushels, registered a decrease of 3 per cent from the 38.2 million of a year ago but was 10 per cent more than the 33.7 million at the same date in 1966. The 11.2 million bushels in West Coast ports (Vancouver-New Westminster, Prince Rupert and Victoria) were smaller than the 11.5 million at November 22, 1967 but above the 9.2 million at the comparable date in 1966.

October 1968 Exports  
of Wheat and Flour Total  
28.1 Million Bushels

Combined exports of wheat in bulk, seed wheat and wheat flour in terms of grain equivalent, during October 1968 amounted to 28.1 million bushels, 14 per cent below the 32.5 million of the previous month, 30 per cent less than the ten-year (1957-66) average for the month of October of 39.8 million but 31 per cent above the 21.5 million of October 1967. Exports of wheat in bulk (as reported by the Board of Grain Commissioners) during the month of October 1968 at 26.0 million bushels represented declines of 13 per cent and 29 per cent, respectively, from the September 1968 total of 30.0 million and the ten-year average of 36.5 million but was 31 per cent larger than the October 1967 figure of 19.9 million. Based on Canadian Customs returns, the equivalent of 2.1 million bushels of wheat was exported in the form of flour during October 1968, 15 per cent below the 2.4 million of the previous month, 36 per cent smaller than the ten-year average of 3.2 million bushels but 31 per cent more than the adjusted 1.6 million of October 1967.

Cumulative exports of wheat in bulk during the August-October period of the current crop year amounted to 87.1 million bushels, 35 per cent above the 64.5 million shipped during the first three months of the 1967-68 crop year but 16 per cent smaller than the ten-year average for the period of 103.2 million. Communist China and Britain were the two leading markets for Canadian wheat in bulk during the first three months of the current crop year with shipments to these countries amounting to 22.6 million and 19.0 million bushels, and accounted for 26 per cent and 22



per cent, respectively, of the August-October total. During the same period last year Communist China accounted for 5 per cent and Britain 26 per cent of the August-October 1967 total. Other principal importers of Canadian wheat for the first three months of the current crop year with figures for the same period of the preceding crop year in brackets, were as follows, in millions of bushels: Japan, 12.0 (8.6); Italy, 7.5 (3.9); Federal Republic of Germany, 4.3 (5.1); Poland, 3.4 (2.5); Pakistan, 2.7 (0.9); Belgium and Luxemburg, 1.9 (3.7); Switzerland, 1.9 (1.0); U.S.S.R., (Russia), 1.7 (9.3); Cuba, 1.7 (1.1); Netherlands, 1.6 (2.4); Venezuela, 1.3 (0.9); and Syria, 1.1 (0.03). Cumulative exports of seed wheat during August-October of the current crop year, based on Canadian Customs returns, amounted to 46 thousand bushels compared with last year's comparable total (adjusted to remove time lag) of 179 thousand.

Cumulative exports of wheat flour during the first three months of the 1968-69 crop year, based on Customs returns, were the equivalent of 6.8 million bushels of wheat, 6 per cent more than the adjusted August-October 1967 total of 6.4 million bushels. Cuba's purchases, the leading market for Canadian wheat flour during the period under review, amounted to the equivalent of 2.8 million bushels and accounted for 41 per cent of the August-October 1968 total. Other principal markets for Canadian wheat flour in terms of grain equivalent during the August-October 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: Ceylon, 830 (13); Britain, 644 (789); Ghana, 629 (566); Leeward and Windward Islands, 211 (218); Lebanon, 172 (183); Trinidad and Tobago, 165 (100); and United States, 138 (97).

Canadian Wheat  
Situation and Outlook

The following is taken from the report on Grains and Feeds as prepared for the Federal-Provincial Agricultural Outlook Conference, November 25 and 26, 1968:

Canadian Situation 1967-68. — Stocks of wheat carried into the 1967-68 crop year totalled 577 million bushels, 157 million bushels more than August 1, 1966 and 85 million bushels more than the average beginning carryover for the previous five year period. Although it was dry in 1967, production did not fall as greatly as was anticipated. The harvest, at 593 million bushels, was 28 per cent lower than the record 1966 crop, but 5 per cent above the 1961-62 to 1965-66 five year average. Total wheat supplies of 1,170 million bushels were 6 per cent smaller than the previous year but 11 per cent above the 1961-62 to 1965-66 average.

Farmers' marketing of wheat during the 1967-68 season amounted to 453 million bushels or 29 per cent less than the record marketings of the previous year. At 167 million bushels, domestic consumption was up 8 per cent because of the larger quantities of wheat fed to livestock in western Canada. In total, 63 million bushels of wheat were fed, of which 10 million bushels moved under the Canadian Livestock Feed Board Assistance program. In addition, 40 million bushels were used for seed and 63 million bushels went for human food. Although domestic consumption of wheat flour was up slightly, total production of flour was down 6 per cent to 3,760 million pounds.

Wheat and wheat flour exports totalled 336 million bushels, 35 per cent below the previous year and 26 per cent below the 1961-62 to 1965-66 average. The Canadian share of total world trade dropped to 17.2 per cent from 25.1 per cent to 1966-67 and an average of 23.5 per cent during the previous five years. Exports to developed countries fell 23 per cent to 159 million bushels, due to smaller imports by some western European countries, South Africa and Japan, and strong competition from other exporters. Shipments to developing countries declined by 42 per cent to 43 million

bushels as the result of reduced food aid shipments to India and Pakistan and a slight decline in commercial trade. For the second consecutive year exports to Communist countries decreased, falling to 133 million bushels in 1967-68, a drop of 43 per cent from the previous year. Although there was a slight increase in exports to Czechoslovakia, there was a sharp decline in wheat trade with all other Communist trading partners. Trade with East European countries and the U.S.S.R. was down on account of their good production in 1967 which helped to build up diminished stocks. Canadian exports to Mainland China were affected by the internal problems and the larger crop in that country, and by the availability of large world supplies of low priced wheat.

Canadian wheat prices, which are the same for both the domestic and export market, averaged \$1.94 per bushel for No. 1 Northern, in store at the Lakehead during 1967-68, compared to the record \$2.12 per bushel in 1966-67, and the previous five year average price of \$1.98 per bushel. The initial payment to producers increased from \$1.50 per bushel for No. 1 Northern, in store at the Lakehead in 1966-67, to \$1.70 per bushel in 1967-68. For the period prior to the commencement of the International Grains Arrangement, the Canadian government paid into the Canadian Wheat Board pools, the difference between the sale price and a price equivalent to the new I.G.A. minimum of approximately \$1.95 1/2 per bushel for No. 1 Northern, in store at the Lakehead, for all sales made below this minimum.

Canadian Outlook 1968-69. — Seeded acreage declined by 2 per cent to 29.4 million acres. Across most of the Prairies the growing season was quite dry but sufficient soil moisture reserves from spring rains helped to carry the crop into August. Especially heavy rains in August and early September delayed harvesting operations and created some problems with handling of tough and damp grain. The November 15 forecast of production places the crop at 650 million bushels, up 10 per cent from last year. The yield is forecast at 22.1 bushels per acre compared with 19.7 last year. Wheat grades will be lower this year due mainly to frost and sprouting. Included in the production estimate is the Ontario winter wheat crop of 14.9 million bushels, slightly lower than last year.

With the return of orderly marketing following the implementation of the International Grains Arrangement, Canada's exports to developed importing countries in 1968-69 are expected to increase over the low level of shipments last year and could total as much as 180 million bushels. Food aid shipments to developing countries may be up slightly over last year. Total food aid shipments will likely to be in the region of 35 to 40 million bushels and commercial trade with developing countries will boost the total exports to these countries in 1968-69 to about 50 million bushels. Exports to Communist countries should rise this year. The balance outstanding on July 31 under the current three year agreement with the U.S.S.R. was about 150 million bushels. It is also expected that East European countries, under various agreement with Canada, will take about 20 million bushels to make up for reduction in supplies due to drought. As of July 31, 1968, there was a minimum of 18 million bushels and a maximum of 130 million bushels outstanding under the trade agreement with Mainland China. Many factors will affect the size of purchases, but total Canadian exports to Communist countries could be much higher than the 132 million bushels shipped in 1967-68.

In spite of the forecast for only a slight increase in world trade this year, Canada's exports could increase to 450 million bushels and possibly more. It is the objective of the Canadian Wheat Board to secure 25 per cent or more of world wheat trade. This will mean exports of 1,300 million bushels over the next three years.



The increase in supplies of lower quality wheat from the 1968 harvest combined with a large supply of high quality wheat from last year will provide a wider range of wheats for export and may enable larger sales to be made in particular markets. Also, with larger supplies of lower quality wheat, domestic utilization may be as high as last year when larger quantities of wheat were fed to livestock. The total supply for the current crop year is forecast at a record 1,317 million bushels. Exports and domestic consumption as anticipated may result in level of carryover stocks at July 31, 1969, in the region of 700 million bushels.

The wheat flour outlook is for a continued decline in production with reduced exports more than offsetting a slight increase in total domestic consumption. A large durum wheat crop in Canada and the United States and little increase in exports will likely hold durum prices at the low level of about \$2.00 per bushel that prevailed near the end of last season. It is anticipated that there will be a considerably increased supply of durum wheat carried over on farms into the 1969-70 season and this suggests that there will be a reduced acreage seeded to durum wheat next spring.

The general wheat outlook for 1968-69 is one of a continued build-up in wheat stocks because production will be slightly greater than domestic and export utilization. If exports reach the levels forecast, producers should be able to market more wheat than last year. However, no increase in acreage seeded in 1969 would seem to be necessary and a planted acreage somewhat lower than in 1968 would provide adequate supplies to meet anticipated needs in 1969-70.

Canada's 1968 Wheat Crop  
Estimated at 649.8  
Million Bushels

Based on conditions at October 23 Canada's 1968 wheat crop now estimated at 649.8 million bushels is 10 per cent above last year's 592.9 million bushels and 20 per cent above the ten-year average of 540.4 million bushels. The increase in production compared with last year is due to a 12 per cent increase in yields which more than offset a 2 per cent decrease in seeded acreage. The average yield at 22.1 bushels per acre is 8 per cent above the ten-year (1957-66) average of 20.5 bushels per acre. This year's all Canada crop of spring wheat, including durum, is estimated at 634.9 million bushels compared with the 1967 crop of 577.4 million and the ten-year average of 523.1 million bushels. Ontario's winter wheat crop is estimated at 14.9 million bushels, a decrease of 4 per cent from last year's crop of 15.5 million.

In the Prairie Provinces the 1968 wheat crop is now placed at 629.0 million bushels, some 55.0 million bushels or 10 per cent above the 1967 crop of 574.0 million bushels. Production in Saskatchewan, accounts for 57 per cent of this year's all Canada wheat crop and is estimated at 372.0 million bushels, some 10 per cent more than last year's 339.0 million bushels. The Alberta crop, estimated at 166.0 million bushels, is up 14 per cent from last year's production of 145.0 million while the Manitoba crop of 91.0 million is one per cent larger than the 1967 outturn. The indicated average yield per seeded acre in the Prairie Provinces is 21.8 bushels, with Manitoba averaging 26.8 Saskatchewan, 19.6 and Alberta, 25.7 bushels per acre. Current estimates of production in the Prairie Provinces included relatively small quantities of winter wheat principally in Alberta, and an estimated 44.4 million bushels of durum wheat.



November Estimate of the 1968 Production of Spring and Winter Wheat in Canada  
Compared with 1967

Crop	Area		Yield per acre		Production	
	1967	1968	1967	1968(1)	1967	1968(1)
	acres		bushels		bushels	
CANADA						
Spring wheat(2).	29,720,800	29,067,500	19.4	21.8	577,440,000	634,934,000
Winter wheat ...	400,000	355,000	38.7	42.0	15,480,000	14,910,000
All wheat ....	30,120,800	29,422,500	19.7	22.1	592,920,000	649,844,000
PRAIRIE PROVINCES						
Manitoba .....	3,520,000	3,400,000	25.6	26.8	90,000,000	91,000,000
Saskatchewan ...	19,670,000	19,000,000	17.2	19.6	339,000,000	372,000,000
Alberta .....	6,380,000	6,460,000	22.7	25.7	145,000,000	166,000,000
Totals(2) ....	29,570,000	28,860,000	19.4	21.8	574,000,000	629,000,000

(1) As indicated on basis of conditions on or about October 23.

(2) Includes durum wheat and relatively small quantities of winter wheat in all provinces except Ontario.

Durum Wheat. — The acreage in durum wheat in the Prairie Provinces in 1968 was 80 per cent larger than that seeded in 1967, and average yields estimated at 19.0 bushels per acre, are 23 per cent above the 1967 figure of 15.5 bushels. Late-October indications are for a crop of 44.4 million bushels, compared with the 1967 crop of 20.2 million. Estimated production by provinces, in millions of bushels, is as follows: Manitoba, 2.9 Saskatchewan, 35.0 and Alberta 6.5

November Estimate of the 1968 Production of Durum Wheat(1)  
in the Prairie Provinces Compared with 1967

Province	Area		Yield per acre		Production	
	1967	1968	1967	1968(2)	1967	1968(2)
	acres		bushels		bushels	
Manitoba .....	62,000	130,000	20.8	22.3	1,300,000	2,900,000
Saskatchewan .....	1,130,000	2,000,000	14.6	17.5	16,500,000	35,000,000
Alberta .....	110,000	209,000	21.6	31.1	2,400,000	6,500,000
Totals .....	1,302,000	2,339,000	15.5	19.0	20,200,000	44,400,000

(1) Acreage and production included with spring wheat.

(2) As indicated on the basis of conditions on or about October 23.

Delivery Quota on  
Durum Wheat

The Canadian Wheat Board instructions to the trade re quotas (general) No. 17 under date of November 14, 1968 stated that instructions to the Trade re Quotas (General) No. 7 issued September 11, 1968, authorized a supplementary quota of 10 bushels per acre seeded to Durum Wheat until November 29, 1968.

The Board now wishes to announce that this supplementary quota will not be extended beyond November 29 and that on and after December 1, 1968, all deliveries of Durum Wheat must be applied against the specified acreage quota.

Wheat Sales  
to China

On November 15, 1968, the Canadian Wheat Board is pleased to announce that under the provisions of the Third Long Term Agreement with China a further sales contract has been signed to provide for the export of one and one-half million long tons, 5 per cent more or less, of wheat which will be shipped principally from Pacific Coast ports December 1968 through July 1969. This sale consists of No. 4 Northern, 5 Wheat and limited quantities of Garnets and Winters. Assuming that the full tolerance is taken, the sale amounts to 58.8 million bushels.

Including the contract covered by this announcement, total sales under the Third Long Term Agreement now amount to 6.3 million tons, or approximately 235 million bushels. The Third Long Term Agreement between the Board and the Peoples Republic of China provided for the sale and purchase of a minimum of 168 million bushels and a maximum of 280 million bushels of wheat between August 1, 1966 and July 31, 1969. As in the previous contracts, payment terms for sales under the Long Term Agreement are 25 per cent cash when each vessel is loaded, and the balance of 75 per cent in eighteen months, with interest. The deferred payment provision is made possible by a guarantee to The Canadian Wheat Board by the Government of Canada.

Wheat Sales  
to Hungary

The Canadian Wheat Board has on November 4, 1968 entered into a contract with "Agrimpex", Hungarian Trading Company for Agricultural Products, covering the sale of 80,000 metric tons (2,939,000 bushels) of Canadian wheat.

Grades. — 80,000 (eighty thousand) metric tons of No. 3 and/or No. 4 Manitoba Northern Wheat, Board's option of grade, it being agreed, however, that to the extent that Seaboard stocks permit, the Board will preference the delivery of No. 3 Manitoba Northern Wheat, the grade requested by the buyer.

Shipment and delivery. — Shipment of the full contract quantity shall be made ex Canadian Pacific Coast Ports of Vancouver — New Westminster and Victoria, (Board's option of Ports).

It is agreed that the shipment of the wheat indicated above shall be made in accordance with the following shipping programme.

Ex Canadian Pacific Ports (Board's option of Ports). — 26,000 metric tons, 5 per cent more or less, during the period November 10 to 30, 1968; 5,000 metric tons, 5 per cent more or less, during the period November 20 to December 10, 1968; 30,000 metric tons, 5 per cent more or less, during the period December 1 to 31, 1968; and 19,000 metric tons, 5 per cent more or less, during the period January 1 to 31, 1969.

To total overall 80,000 (eighty thousand) metric tons.

General Quota Position By November 25, 1968 out of a total of 1,827 shipping points in the Western Division, the Canadian Wheat Board had placed 754 points on a delivery quota of one bushel per specified acre and 469 points on a two-bushel quota. Some 596 points remained on the initial unit quota while only 8 stations were reported as "closed".

Summary of Elevator Shipping Points in the Western Division  
as at November 25, 1968

Province	Initial unit quota	General quota in bushels per specified acre		Closed	Total
		One	Two		
Ontario .....	-	-	1	-	1
Manitoba .....	218	96	10	-	324
Saskatchewan .....	276	442	266	6	990
Alberta .....	102	216	186	2	506
British Columbia .....	-	-	6	-	6
All provinces .....	596	754	469	8	1,827

Farmers' Marketings Deliveries of wheat from farms in the Prairie Provinces up to November 20 of the current crop year amounted to 110.3 million bushels, 20 per cent less than the comparable 1967 total of 137.5 million and 4 per cent below the ten-year (1957-66) average for the period of 114.5 million bushels.

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

Week ending		Manitoba	Saskatchewan	Alberta	Total	Last year
		bushels				
August	7, 1968	12,286	343,145	1,256	356,687	2,774,267
	14 .....	54,003	433,143	19,546	506,692	410,477
	21 .....	701,320	618,402	734,805	2,054,527	2,328,627
	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
Totals .....		12,786,201	66,658,262	30,841,141	110,285,604	137,531,925
Average similar period: 1957-66		15,681,793	72,804,465	26,032,733	114,518,991	

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



Visible Supply of Canadian Wheat, November 20, 1968  
Compared with Approximately the Same Date, 1966 and 1967

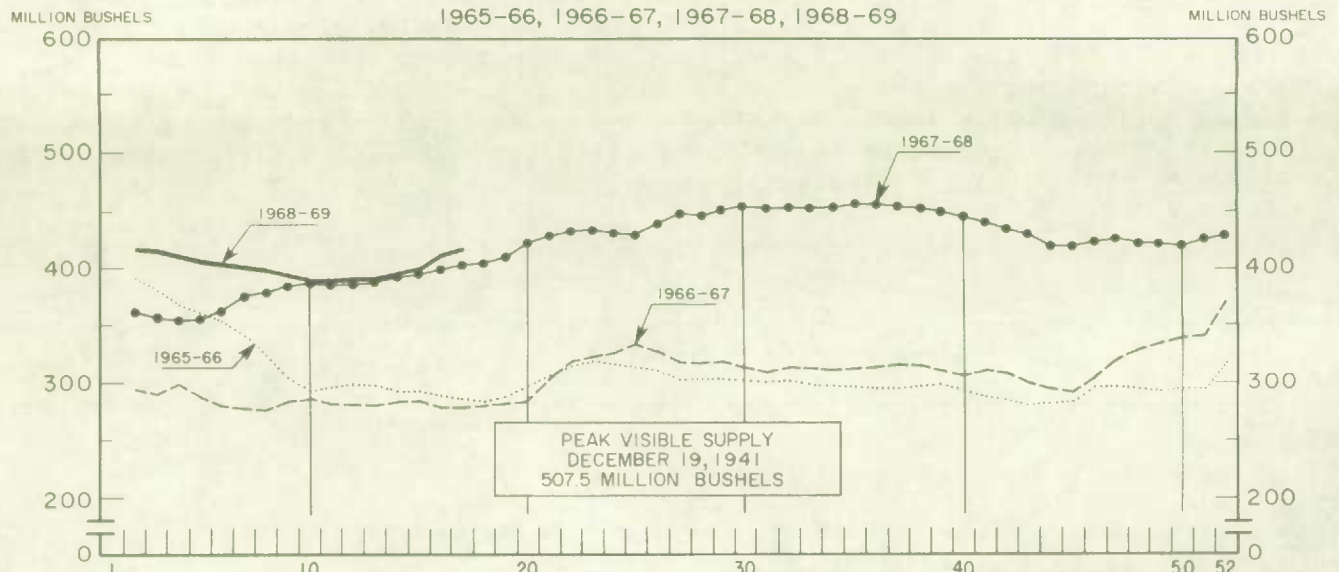
Position	1966	1967	1968
	thousand bushels		
Country elevators - Manitoba .....	10,140	26,993	35,136
Saskatchewan .....	91,265	131,480	144,468
Alberta .....	47,446	71,141	73,043
Sub-totals .....	148,851	229,614	252,647
Interior private and mill .....	6,245	5,815	5,022
Interior terminals .....	1,790	12,509	12,330
Vancouver-New Westminster .....	8,041	10,413	10,003
Victoria .....	528	749	921
Prince Rupert .....	603	309	502
Churchill .....	944	4,581	4,639
Fort William-Port Arthur .....	22,567	40,273	35,710
In transit rail (western division) .....	15,032	17,406	14,919
Bay, Lake and Upper St. Lawrence ports ...	27,849	34,190	32,257
Lower St. Lawrence and Maritime ports ....	33,672	38,199	37,149
In transit lake .....	10,702	8,635	9,222
In transit rail (eastern division) .....	1,426	378	419
Totals .....	278,250	403,071	415,740

Grading of Wheat Inspected, August - October 1968 with Comparisons

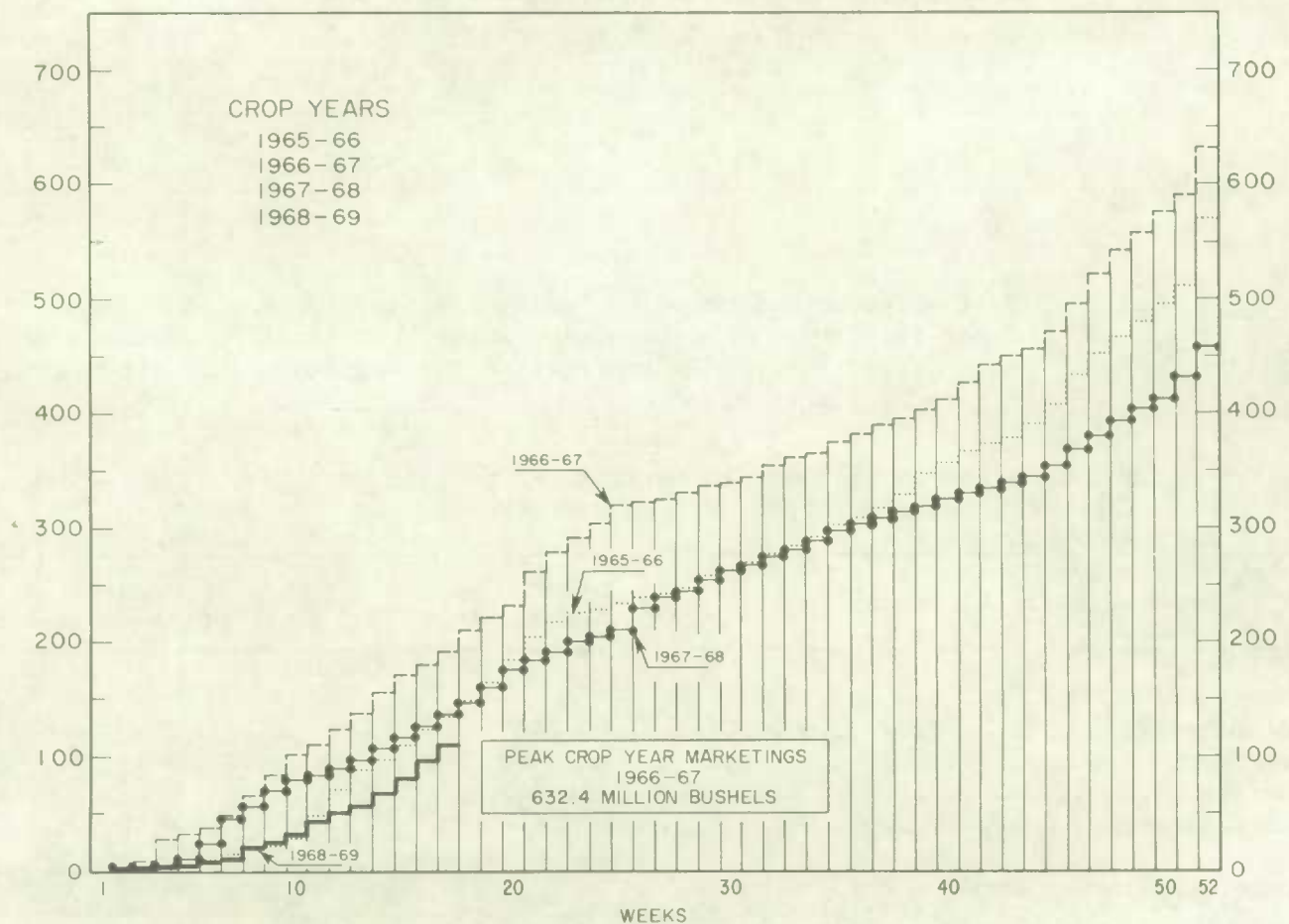
Grade	Crop year		August - October			
	Average					
	1962-63	1967-68	1967		1968	
	1966-67					
	per cent	per cent	cars	per cent	cars	per cent
No. 1 Man. Northern .....	5.1	27.9	5,083	11.1	17,054	31.4
No. 2 Man. Northern .....	35.8	43.4	23,450	51.3	24,729	45.5
No. 3 Man. Northern .....	22.7	14.8	7,933	17.3	5,561	10.2
No. 4 Man. Northern .....	10.5	3.0	1,570	3.4	942	1.7
No. 5 Wheat .....	4.5	0.4	193	0.4	132	0.2
No. 6 Wheat .....	0.6	0.1	43	0.1	62	0.1
Feed Wheat .....	(1)	(1)	5	(1)	11	(1)
Others Red Spring .....	13.3	4.0	2,332	5.1	2,411	4.4
C.W. Garnet .....	0.2	0.3	1	(1)	17	(1)
C.W. White Spring .....	0.1	0.1	46	0.1	49	0.1
C.W. Mixed Wheat .....	0.1	0.1	30	0.1	36	0.1
Alberta Winter .....	0.7	1.0	340	0.7	101	0.2
Nos. 1-6 C.W. Amber Durum .	5.8	4.7	4,523	9.9	2,246	4.1
Others C.W. Amber Durum ...	0.4	0.2	192	0.4	992	1.8
Totals .....	100.0	100.0	45,741	100.0	54,343	100.0
Gross bushels (approx.) ...			89,740,000		104,962,000	

(1) Less than .05 per cent.

# WEEKLY VISIBLE SUPPLY OF CANADIAN WHEAT



## CUMULATIVE RECORD OF WHEAT MARKETINGS IN THE PRAIRIE PROVINCES BY WEEKS



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

Lake Shipments of Canadian Grain Total shipments of the six major grains out of Lakehead terminals from the opening of navigation to November 20 this year amounted to 207.4 million bushels, 35 per cent below the comparable 1967 figure of 317.5 million and 30 per cent less than the 10-year (1957-66) average for the period of 294.4 million. In 1968 the season of navigation opened on April 10 while the 1967 season opened on April 13. Shipments of wheat, at 156.1 million were 24 per cent less than the 1967 figure of 205.8 million bushels and accounted for 75 per cent of the total six grains.

Lake Shipments of Canadian Grain from the Opening of Navigation to November 20, 1968 and to Approximately the Same Date, 1957 to 1967

Year	Wheat	Oats	Barley	Rye	Flaxseed	Rapeseed	Total
thousand bushels							
1957 .....	134,292	41,831	50,001	4,147	10,620	-	240,891
1958 .....	161,762	39,780	66,459	5,242	7,991	-	281,233
1959 .....	154,315	28,875	45,815	4,651	6,131	-	239,787
1960 .....	164,082	25,197	48,061	3,545	8,243	-	249,128
1961 .....	206,597	22,915	40,223	4,284	7,517	-	281,536
1962 .....	146,110	21,251	25,714	5,308	7,522	-	205,905
1963 .....	194,919	38,053	34,587	3,575	6,058	-	277,191
1964 .....	309,006	30,826	36,397	4,922	8,718	59	389,930
1965 .....	252,455	41,850	35,996	3,939	9,725	911	344,877
1966 .....	343,758	30,469	39,959	7,886	13,485	1,099	436,656
1967 .....	205,783	33,808	61,418	5,504	10,092	929	317,535
1968 .....	156,077	17,573	26,185	2,414	4,872	326	207,447

Rail Shipments of Wheat to Maritime Ports Rail shipments of wheat to Maritime ports from Bay, Lake and Upper St. Lawrence ports during August-October 1968 amounted to 98 thousand bushels in contrast to the August-October 1967 figure of 199 thousand.

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

Origin of shipments	August 1 - October 31, 1967	August 1 - October 31, 1968
bushels		
Midland, Tiffin .....	99,240	-
Owen Sound .....	-	46,571
Goderich .....	99,446	-
Port Colborne .....	-	51,106
Totals .....	198,686	97,677



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	—
December .....	7,500	106,833	143,833	—
January .....	46,108	145,889	160,214	—
February .....	26,712	120,334	143,884	—
March .....	98,598	177,393	274,690	—
April .....	71,701	133,699	123,167	—
May .....	89,166	207,038	61,460	—
June .....	178,183	154,139	101,950	—
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, October 1968

Grade	Nova Scotia	New Brunswick	Quebec	Ontario
bushels				
5 Wheat .....	2,000	23,500	1,333	3,000
Tough .....	—	10,000	7,796	—
Rejected .....	—	—	—	1,710
Durum .....	—	—	2,000	6,119
Totals .....	2,000	33,500	11,129	10,829

Overseas Exports of Canadian Grain by Ports of Loading, August 1 — November 20, 1968  
with Comparisons

Port	Wheat(1)	Durum wheat(1)	Oats(1)	Barley	Rye	Flaxseed	Rapeseed
thousand bushels							
<u>Pacific Seaboard</u>							
Van.-New West. ....	39,424	116	—	1,733	1,054	1,046	4,325
Victoria .....	2,385	—	—	—	—	—	—
Prince Rupert .....	1,963	—	—	—	—	—	—
<u>Churchill</u> .....	21,613	—	—	—	—	—	—
<u>Lakehead direct</u> .....	2,205	636	297	1,048	624	1,015	—
<u>Prescott direct</u> .....	336	—	—	—	—	—	—
<u>St. Lawrence</u>							
Montreal .....	8,142	3,760	336	—	51	166	—
Sorel .....	1,724	—	—	—	—	—	—
Trois Rivières .....	1,574	175	—	—	—	6	—
Quebec .....	3,919	58	—	—	—	—	—
Baie Comeau .....	5,893	230	—	—	—	555	—
Port Cartier .....	5,457	1,078	—	—	—	—	—
<u>Maritime</u>							
Halifax .....	220	—	—	—	—	—	—
Totals .....	94,856	6,053	633	2,781	1,729	2,787	4,325
August 1 — November 22, 1967 .	73,185	6,201	810	7,469	1,765	4,870	3,265

(1) Excluding seed.

Shipments Under  
Feed Grain  
Assistance Regulations

Claims filed for payment up to September 30, 1968 represent the movement of 467 thousand bushels of wheat from the Prairie Provinces to Eastern Canada and British Columbia under the Feed Grain Assistance Regulations

during August, 1968. During the same month last year claims had been filed for a total of 877 thousand bushels, indicating on the assumption of approximately the same rate of submission of claims during both months, that the August shipments of wheat under the policy were running about 47 per cent below those of 1967. Revised data on the August, 1967 shipments of wheat based on claims submitted up to September 30, 1968 place the total at 1,145 thousand bushels. The bulk of the month's shipments under review went to destinations in Quebec and Nova Scotia with these two provinces accounting for 60 per cent and 22 per cent of the total, respectively.

Provincial Distribution of Wheat Shipments under the Feed Grain Assistance Regulations  
August 1968 and 1967

Month	Nfld.	P.E.I.	N.S.	N.B.	Que.	Ont.	B.C.	Total
thousand bushels								
August 1968 .....	1	19	101	29	282	34	2	467
Same period 1967								
Preliminary(2) .....	2	12	112	40	472	169	69	877
Revised(1) .....	6	13	119	45	550	244	168	1,145

(1) Based on claims filed up to September 30, 1968.

(2) Based on claims filed up to September 30, 1967.

Preliminary data on millfeed shipments under the Feed Grain Assistance Regulations indicate shipments of 26,272 tons during the first month of the current crop year. During August 1967 claims had been filed for a total of 22,367 tons, indicating on the assumption of approximately the same rate of submission of claims during both months, that this year's shipments of millfeeds under the policy were running about 7 per cent above those of 1967. Revised data on the August 1967 shipments of millfeeds based on claims submitted up to September 30, 1968 place the total at 46,353 tons. The greater portion of the millfeed shipments during the month under review went to destinations in Quebec and Ontario.

Provincial Distribution of Millfeed Shipments under  
the Feed Grain Assistance Regulations  
August 1968 and 1967

Province	1967		1968
	Preliminary(2)	Revised(1)	Preliminary(1)
tons			
Newfoundland .....	84	451	115
Prince Edward Island .	356	518	932
Nova Scotia .....	1,322	2,300	2,525
New Brunswick .....	1,892	2,676	2,264
Quebec .....	11,511	22,578	16,200
Ontario .....	6,608	15,262	4,121
British Columbia .....	594	2,568	115
Totals .....	22,367	46,353	26,272

(1) Based on claims filed up to September 30, 1968.

(2) Based on claims filed up to September 30, 1967.

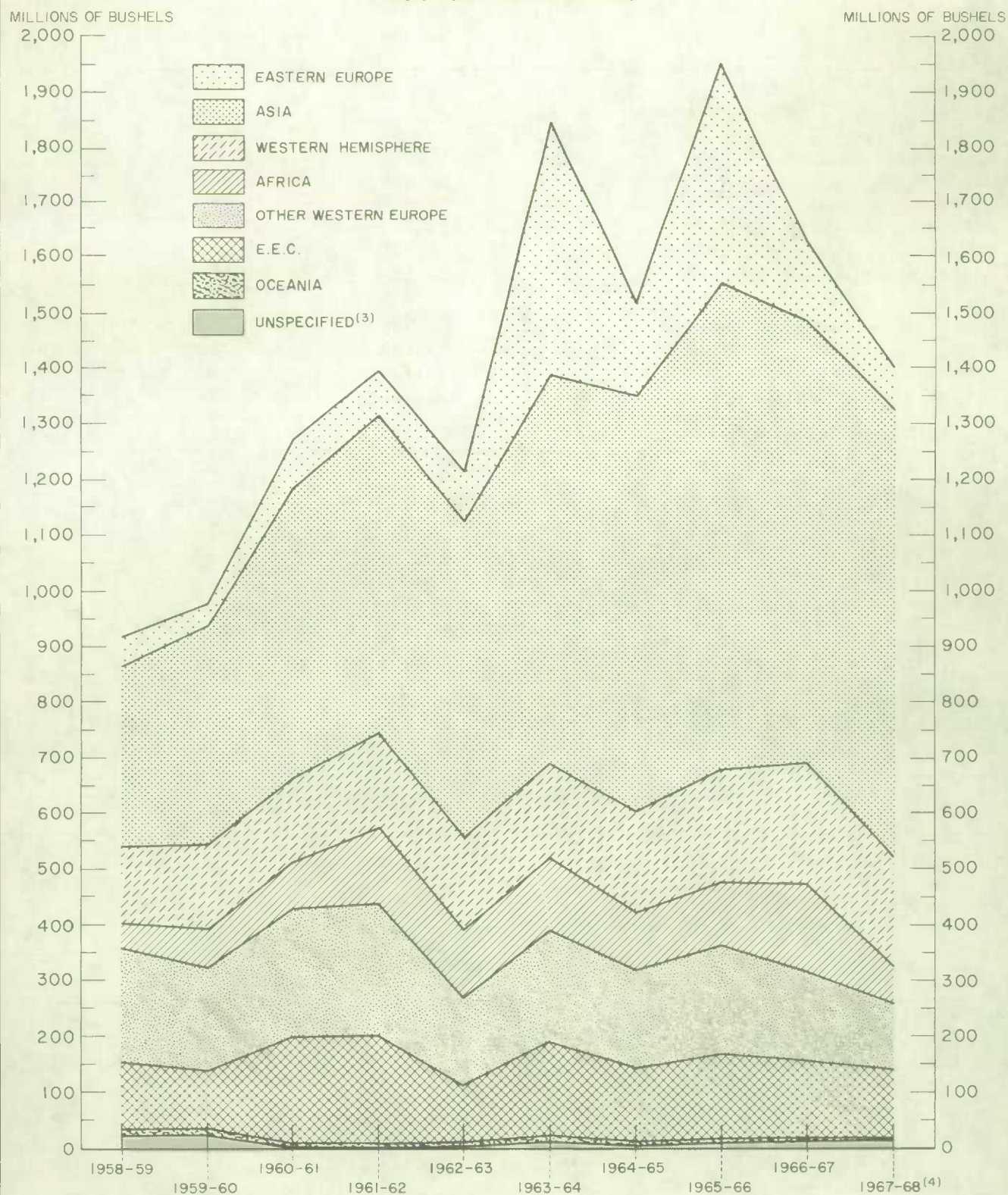
Monthly Exports of Canadian Wheat and Wheat Flour

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	2,077	23,634
April .....	26,661	5	26,666	2,036	28,702
May .....	42,310	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	24,146	335,466
<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	2,077	28,073
Totals .....	87,142	46	87,187	6,784	93,971

- (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.



# WHEAT<sup>(1)</sup> SHIPMENTS FROM FOUR MAJOR EXPORTERS<sup>(2)</sup> BY REGIONS 1958-59 TO 1967-68



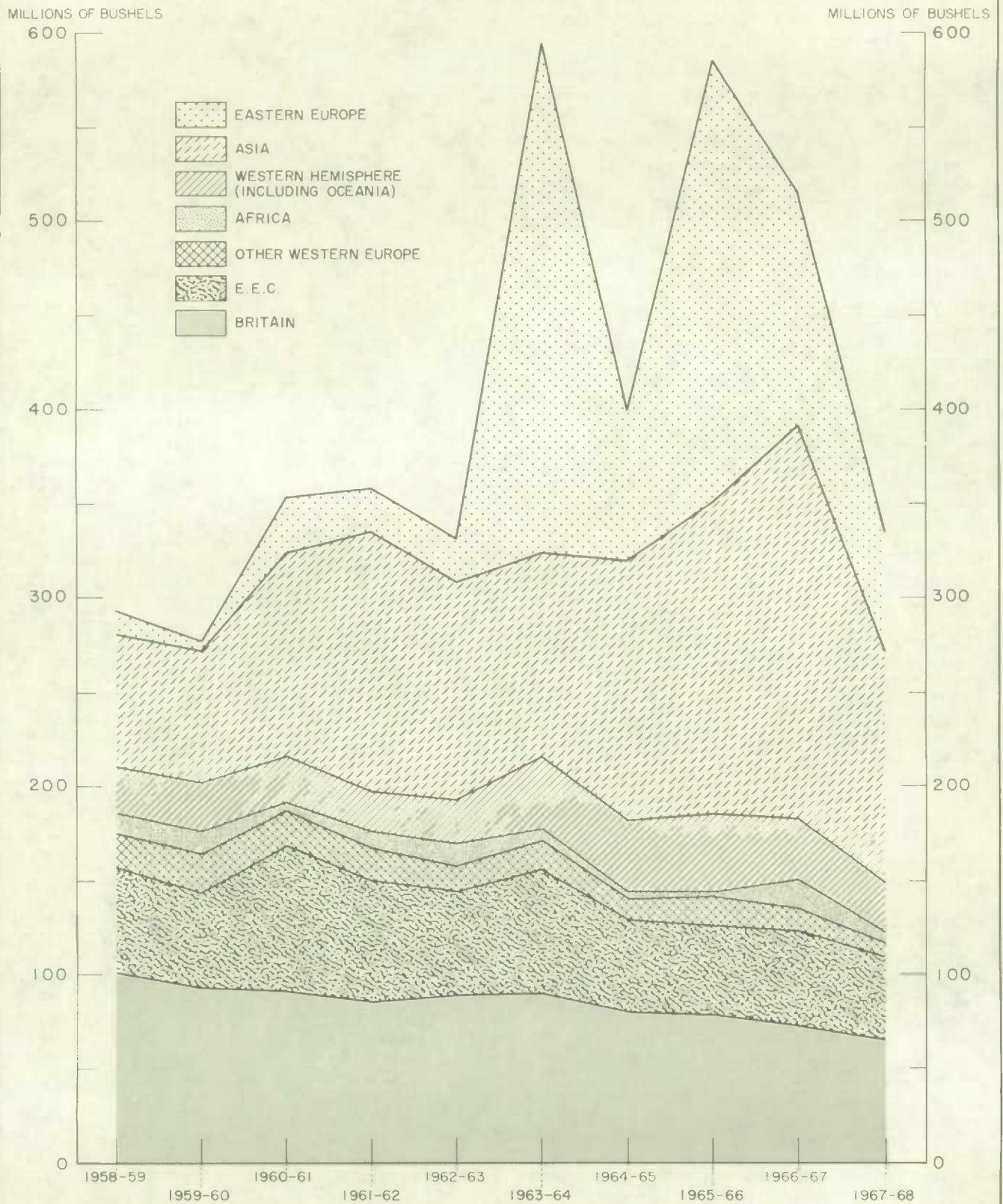
(1) INCLUDES FLOUR AS WHEAT EQUIVALENT.

(2) UNITED STATES, CANADA, ARGENTINA AND AUSTRALIA.

(3) INCLUDES SHIPMENTS UNDER RELIEF PROGRAMMES.

(4) PRELIMINARY

# CANADIAN WHEAT AND FLOUR EXPORTS BY REGIONS 1958-59 TO 1967-68





Exports of Canadian Wheat and Wheat Flour by Destination, Crop Years 1967-68 and 1966-67

Destination	Wheat(1)	Durum wheat(1)	Wheat flour(2)	Total wheat(1) and wheat flour(2)	Total same period last year
bushels					
<u>Western Europe</u>					
EEC:					
Belgium and Luxembourg ...	9,426,117	449,018	97,752	9,972,887	13,862,839
France .....	763,909	92,213	-	856,122	1,747,966
Germany, Federal Republic	13,926,257	3,620,533	-	17,546,790	22,582,315
Italy .....	8,917,201	1,233,589	22,655	10,173,445	9,484,635
Netherlands .....	3,892,175	1,107,561	16,921	5,016,657	2,637,450
Sub-totals .....	36,925,659	6,502,914	137,328	43,565,901	50,315,205
<u>Other Western Europe</u>					
Austria .....	-	638,430	-	638,430	1,573,291
Britain .....	61,705,519	358,838	2,888,384	64,952,741	73,134,485
Denmark .....	31,733	-	1,380	33,113	24,930
Finland .....	962,240	-	-	962,240	1,052,576
Gibraltar .....	-	-	17,388	17,388	26,017
Greece .....	-	-	64,986	64,986	113,907
Iceland .....	-	-	6,035	6,035	8,050
Ireland .....	1,416,919	11,200	9,338	1,437,457	1,728,927
Malta and Gozo .....	561,680	10,640	-	572,320	577,995
Norway .....	1,706,955	-	115	1,707,070	1,547,940
Portugal .....	-	-	75,341	75,341	635,586
Spain .....	-	-	1,967	1,967	-
Sweden .....	74,667	-	515	75,182	14,649
Switzerland .....	753,368	1,842,556	92	2,596,016	4,889,584
Sub-totals .....	67,213,081	2,861,664	3,065,541	73,140,286	85,327,937
Totals .....	104,138,740	9,364,578	3,202,869	116,706,187	135,643,142
<u>Eastern Europe</u>					
Albania .....	1,863,568	-	-	1,863,568	4,220,943
Bulgaria .....	-	-	-	-	3,800,320
Czechoslovakia .....	3,292,635	1,106,933	-	4,399,568	4,202,025
Germany, East .....	-	-	-	-	4,460,835
Hungary .....	2,443,570	-	-	2,443,570	-
Poland .....	4,498,204	1,257,255	-	5,755,459	13,782,637
U.S.S.R. (Russia) .....	48,604,020	426,496	-	49,030,516	93,232,427
Yugoslavia .....	-	-	4,379	4,379	-
Totals .....	60,701,997	2,790,684	4,379	63,497,060	123,699,187
<u>Africa</u>					
Algeria .....	818,577	-	138,941	957,518	1,198,219
Angola .....	-	-	28,681	28,681	22,448
Cameroun Republic .....	-	-	31,025	31,025	44,845
Congo-Kinshasa .....	-	-	80,334	80,334	36,218
Dahomey .....	-	-	48,024	48,024	23,002
French Africa, nes .....	-	-	-	-	34,438
Gambia .....	-	-	96,101	96,101	56,569
Ghana .....	265,249	-	1,485,846	1,751,095	1,278,908
Guinea Republic .....	-	-	12,650	12,650	-
Ivory Coast .....	-	-	8,294	8,294	1,380
Liberia .....	-	-	188,956	188,956	194,915
Libya .....	-	-	225	225	-
Malawi .....	-	-	65,872	65,872	70,651
Morocco .....	-	-	53,243	53,243	643,015

See footnotes at end of table.



Exports of Canadian Wheat and Wheat Flour by Destination, Crop Years 1967-68 and 1966-67

Destination	Wheat(1)	Durum wheat(1)	Wheat flour(2)	Total wheat(1) and wheat flour(2)	Total same period last year
bushels					
<u>Africa (concluded)</u>					
Mozambique .....	-	-	44,144	44,144	72,542
Nigeria .....	686,000	-	-	686,000	958,578
Portuguese Africa, nes .....	-	-	41,158	41,158	41,276
Republic of South Africa ...	901,600	-	6,751	908,351	9,433,397
Senegal .....	-	-	460	460	198,761
Sierra Leone .....	-	-	11,884	11,884	438,198
Sudan .....	60,262	-	-	60,262	36,194
Tanzania .....	298,680	-	12,880	311,560	7,845
Tunisia .....	-	461,626	2,222	463,848	-
Togo .....	-	-	157,053	157,053	165,529
U.A.R. - Egypt .....	-	-	36,963	36,963	43,100
Zambia .....	-	-	6,900	6,900	2,300
Totals .....	3,030,368	461,626	2,558,607	6,050,601	15,002,328
<u>Asia</u>					
Aden .....	-	-	2,061	2,061	56,704
Afghanistan .....	-	-	517	517	360,268
Bahrain .....	-	-	591	591	143
Ceylon .....	-	-	859,628	859,628	1,049,260
China, Communist .....	52,012,941	-	-	52,012,941	90,459,755
Cyprus .....	-	-	412	412	831
Hong Kong .....	915,413	-	380,377	1,295,790	1,581,268
India .....	22,394,749	-	79,962	22,474,711	43,584,538
Indonesia .....	-	-	-	-	108,208
Iran .....	-	-	1,547	1,547	5,325
Iraq .....	44,092	-	-	44,092	-
Israel .....	-	-	543,837	543,837	-
Japan .....	40,487,229	355,795	6,944	40,849,968	60,244,184
Jordan .....	12,860	-	5,219	18,079	55,892
Korea, North .....	-	-	-	-	940,426
Korea, South .....	-	-	19,470	19,470	32,294
Lebanon .....	8,613	-	195,942	204,555	80,727
Malaysia .....	519,307	-	-	519,307	-
Malaysia and Singapore .....	-	-	-	-	579,697
Pakistan .....	875,609	-	-	875,609	7,572,687
Philippines .....	927,733	-	354	928,087	515,200
Portuguese Asia .....	-	-	17,112	17,112	35,456
Qatar .....	-	-	655	655	462
Saudi Arabia .....	146,249	-	150,797	297,046	101,820
Singapore .....	195,627	-	-	195,627	-
Syria .....	170,130	-	116,775	286,905	36,891
Taiwan .....	902,249	-	-	902,249	74,074
Thailand .....	-	-	214,450	214,450	228,850
Trucial States .....	-	-	322	322	18
Turkey .....	124,927	-	-	124,927	331,034
Totals .....	119,737,728	355,795	2,596,972	122,690,495	208,036,012
<u>Oceania</u>					
British Oceania, nes .....	-	-	3,105	3,105	1,380
Fiji .....	-	-	7,554	7,554	6,843
French Oceania .....	-	-	-	-	497
New Zealand .....	-	-	173	173	-
United States Oceania .....	-	-	42,780	42,780	43,930
Totals .....	-	-	53,612	53,612	52,650

See footnotes at end of table.

Exports of Canadian Wheat and Wheat Flour by Destination, Crop Years 1967-68 and 1966-67

Destination	Wheat(1)	Durum wheat(1)	Wheat flour(2)	Total wheat(1) and wheat flour(2)	Total same period last year
bushels					
<u>Western Hemisphere</u>					
Argentina .....	-	-	-	-	5,120
Bahamas .....	-	-	308,649	308,649	322,773
Barbados .....	60	-	216,610	216,670	231,610
Bermuda .....	-	-	107,385	107,385	130,348
Bolivia .....	-	-	18,462	18,462	18,255
Brazil .....	-	-	110	110	5,122
British Honduras .....	-	-	53,820	53,820	59,582
Chile .....	-	-	205	205	-
Colombia .....	-	-	10,148	10,148	-
Costa Rica .....	-	-	2,350	2,350	971,712
Cuba .....	5,777,120	130,401	11,293,648(3)	17,201,169	19,517,345
Dominican Republic .....	-	-	2,896	2,896	2,254
Ecuador .....	405,456	-	-	405,456	413,831
El Salvador .....	167,488	-	483	167,971	630,066
French Guiana .....	-	-	920	920	3,335
French West Indies .....	-	-	9,170	9,170	3,379
Guatemala .....	3,685	-	6,100	9,785	54,861
Guyana .....	-	-	79,479	79,479	83,614
Haiti Republic .....	-	-	24,973	24,973	4,048
Honduras Republic .....	-	-	24,822	24,822	47,902
Jamaica .....	459,441	-	1,476,149	1,935,590	1,529,586
Leeward and Windward Islands .	-	-	830,847	830,847	986,362
Netherlands Antilles .....	-	-	134,028	134,028	123,283
Nicaragua .....	-	-	-	-	250,269
Panama .....	-	-	39,914	39,914	36,161
Peru .....	-	-	22,848	22,848	51,951
Puerto Rico .....	-	-	96	96	-
St. Lucia .....	373	-	-	373	187
St. Pierre and Miquelon ...	-	-	26,772	26,772	21,501
Surinam .....	-	-	8,342	8,342	11,006
Trinidad and Tobago .....	-	-	446,384	446,384	912,806
Venezuela .....	3,057,724	81,387	598	3,139,709	4,978,289
<u>United States:</u>					
Flour in terms of wheat .	-	-	583,581	583,581	593,225
Wheat for domestic use(4)	4,357	-	-	4,357	154,913
Totals .....	9,875,704	211,788	15,729,789	25,817,281	32,154,696
<u>Sub-totals,</u>					
all countries .....	297,484,537	13,184,471	24,146,228	334,815,236	514,588,015
Seed wheat(5) .....	-	-	-	651,261	718,593
Totals, all countries .	297,484,537	13,184,471	24,146,228	335,466,497	515,306,608

nes - not elsewhere specified.

- (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) Adjusted to remove effect of time lag in the returns made by Customs. In terms of wheat equivalent. Source: Canadian Customs returns. Conversion rate: 2.3 bushels per cwt.
- (3) Source - Canadian National Millers Association.
- (4) Compiled from returns of Canadian elevator licensees and shippers and advice from American grain correspondents.
- (5) Adjusted to remove effect of time lag in the returns may by Customs.

# FARMERS' MARKETINGS OF WHEAT, PRAIRIE PROVINCES

(SPECIFIED PERIODS)

MILLION BUSHEL

800 —

700 —

600 —

500 —

400 —

300 —

200 —

100 —

0

MILLION BUSHEL

800 —

700 —

600 —

500 —

400 —

300 —

200 —

100 —

0

PEAK MARKETINGS  
1966-67 CROP YEAR  
632.4 MILLION BUSHEL

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

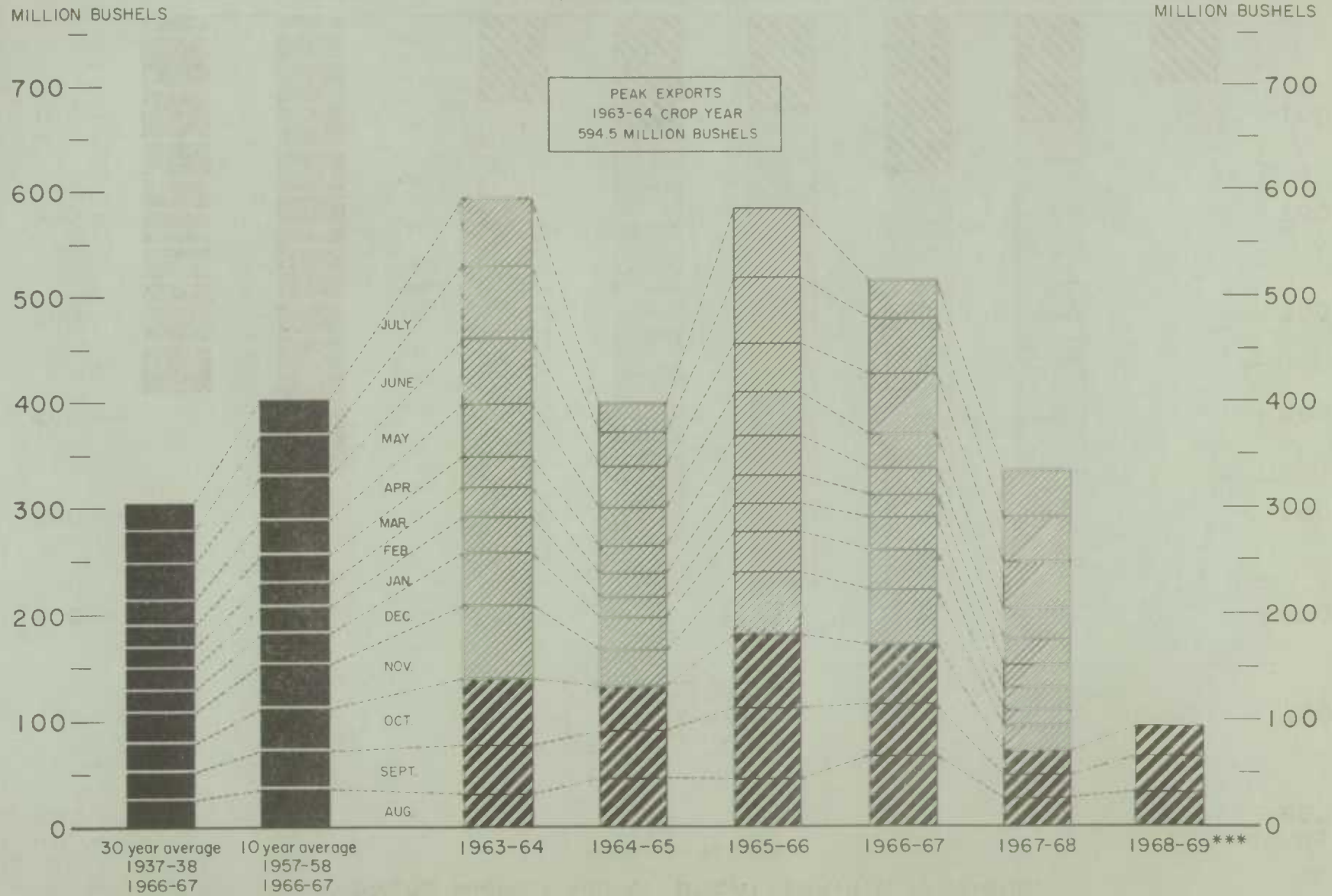
1967-68

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 BUSHEL

140 —

120 —

100 —

80 —

60 —

40 —

20 —

0

MILLION BUSHEL

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.

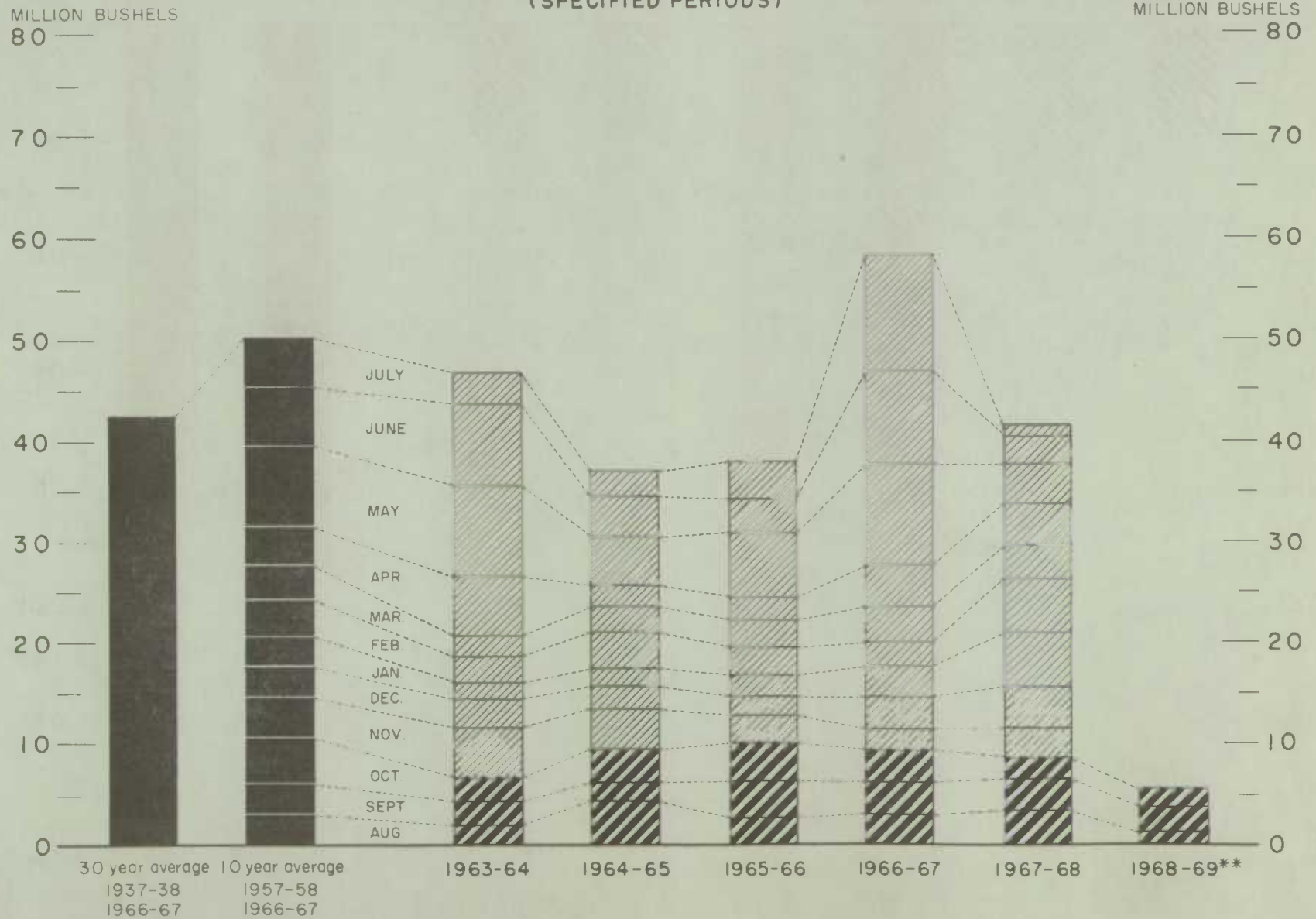
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Agriculture Division D.B.S.

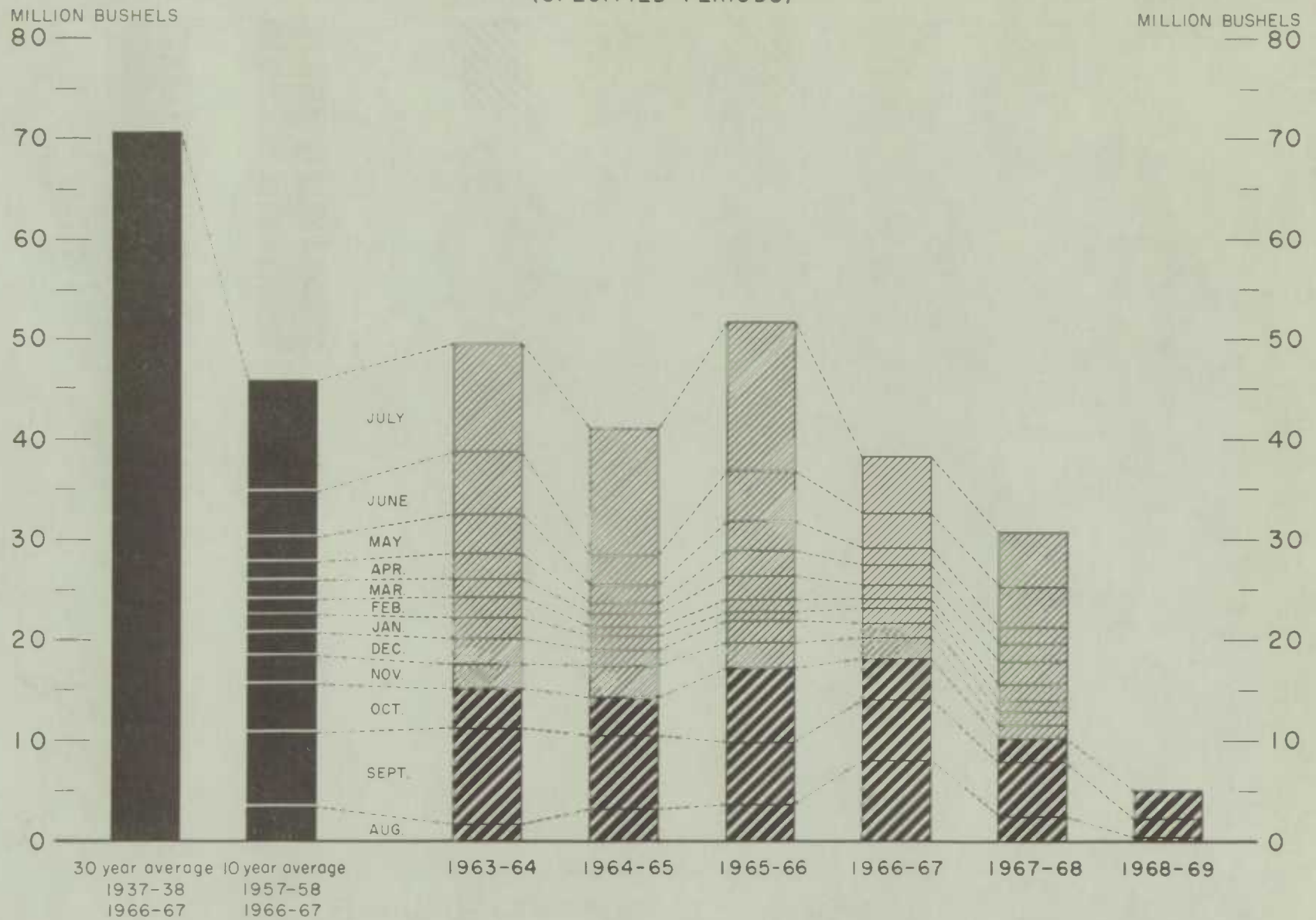
# EXPORTS OF CANADIAN BARLEY AND BARLEY PRODUCTS\*

(SPECIFIED PERIODS)





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



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



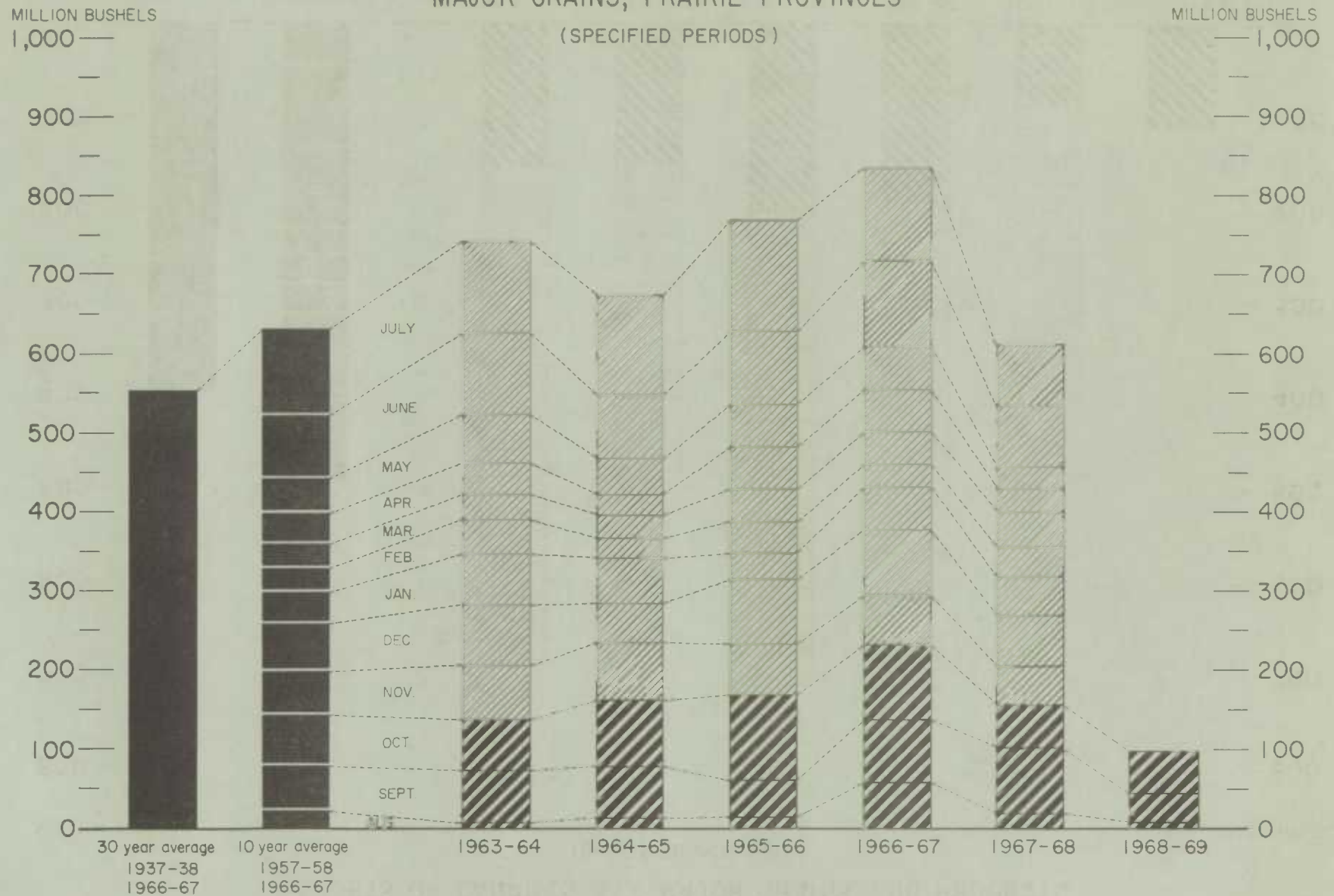
\* Beginning with 1960-61 includes relatively small quantity of seed oats.

\*\* In terms of grain equivalent

\*\*\* Preliminary

Agriculture Division D.B.S.

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



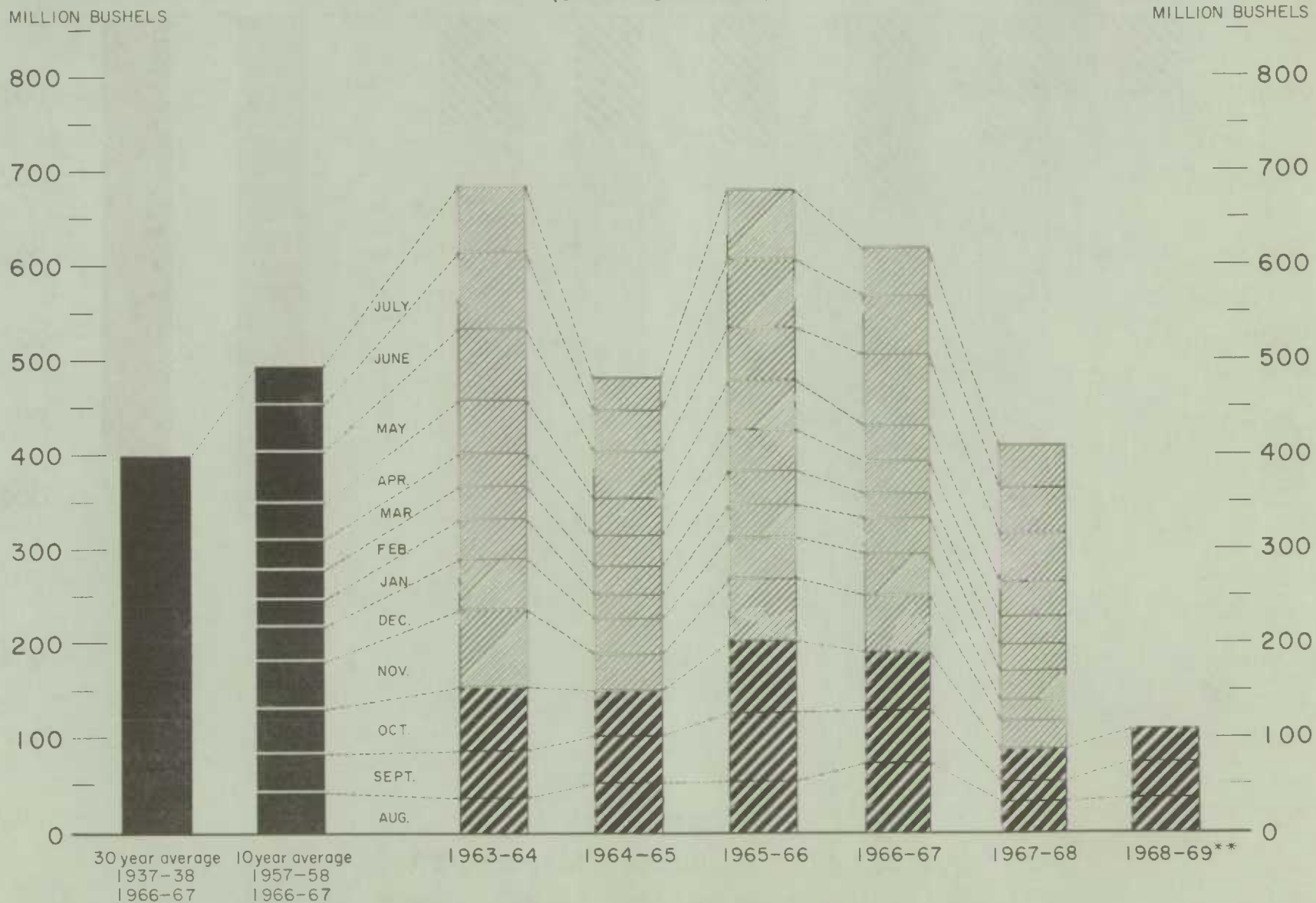
\* Wheat, oats, barley, rye, flaxseed and from 1960-61 rapeseed.

Agriculture Division D.B.S.



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

(SPECIFIED PERIODS)



Exports of Canadian Wheat(1) by Destination, October 1968 and 1967

Destination	Wheat (except durum)	Durum wheat	All wheat	
			October 1968	October 1967 <sup>r</sup>
			bushels	
<u>Western Europe</u>				
EEC:				
Belgium and Luxembourg .....	603,634	-	603,634	764,760
France .....	448,430	-	448,430	86,719
Germany, Federal Republic ...	1,831,468	120,744	1,952,212	2,908,533
Italy .....	2,255,720	540,871	2,796,591	1,263,581
Netherlands .....	1,028,870	-	1,028,870	1,221,683
Sub-totals .....	6,168,122	661,615	6,829,737	6,245,276
<u>Other Western Europe</u>				
Austria .....	-	55,216	55,216	-
Britain .....	4,247,449	-	4,247,449	4,013,518
Finland .....	308,000	-	308,000	304,640
Ireland .....	74,667	-	74,667	13,133
Switzerland .....	362,133	143,296	505,429	279,767
Sub-totals .....	4,992,249	198,512	5,190,761	4,611,058
Totals .....	11,160,371	860,127	12,020,498	10,856,334
<u>Eastern Europe</u>				
U.S.S.R. (Russia) .....	850,840	-	850,840	4,119,084
<u>Africa</u>				
Ghana .....	73,491	-	73,491	-
Nigeria .....	-	-	-	300,533
Tanzania .....	-	-	-	106,425
Totals .....	73,491	-	73,491	406,958
<u>Asia</u>				
China, Communist .....	6,180,937	-	6,180,937	216,720
Hong Kong .....	120,400	-	120,400	91,093
India .....	27,389	-	27,389	-
Japan .....	3,128,523	-	3,128,523	3,621,666
Malaysia .....	38,080	-	38,080	56,933
Pakistan .....	1,755,947	-	1,755,947	-
Singapore .....	38,267	-	38,267	35,467
Syria .....	521,696	-	521,696	-
Totals .....	11,811,239	-	11,811,239	4,021,879
<u>Western Hemisphere</u>				
Cuba .....	422,800	-	422,800	70,933
Ecuador .....	154,933	-	154,933	150,656
El Salvador .....	-	-	-	56,933
Jamaica .....	796	-	796	997
St. Lucia .....	-	-	-	373
Venezuela .....	660,745	-	660,745	166,699
Totals .....	1,239,274	-	1,239,274	446,591
Sub-totals, all countries .	25,135,215	860,127	25,995,342	19,850,846
Seed wheat(2) .....			206	66,544
Totals, all countries ...	25,135,215	860,127	25,995,548	19,917,390

(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. Wheat 1967 adjusted for time lag, 1968 preliminary.

<sup>r</sup> Revised figures.

Cumulative Exports of Canadian Wheat(1) by Destination

Destination	August - October 1968			Total same period last year <sup>r</sup>
	Wheat (except durum)	Durum wheat	Total wheat	
bushels				
<u>Western Europe</u>				
EEC:				
Belgium and Luxembourg ...	1,922,977 <sup>r</sup>	12,201 <sup>r</sup>	1,935,178 <sup>r</sup>	3,709,042
France .....	653,954 <sup>r</sup>	221,056 <sup>r</sup>	875,010 <sup>r</sup>	394,760
Germany, Federal Republic.	3,484,365 <sup>r</sup>	791,512 <sup>r</sup>	4,275,877 <sup>r</sup>	5,097,644
Italy .....	4,716,574	2,767,180	7,483,754	3,854,764
Netherlands .....	1,504,084 <sup>r</sup>	90,841 <sup>r</sup>	1,594,925 <sup>r</sup>	2,383,529
Sub-totals .....	12,281,954 <sup>r</sup>	3,882,790 <sup>r</sup>	16,164,744 <sup>r</sup>	15,439,739
<u>Other Western Europe</u>				
Austria .....	-	316,549	316,549	404,200
Britain .....	18,912,069	68,376	18,980,445	16,839,980
Finland .....	308,000	-	308,000	304,640
Ireland .....	227,734	-	227,734	386,466
Malta and Gozo .....	-	-	-	263,200
Norway .....	588,000	-	588,000	1,194,667
Sweden .....	22,400	-	22,400	-
Switzerland .....	1,046,266 <sup>r</sup>	811,314 <sup>r</sup>	1,857,580 <sup>r</sup>	965,515
Sub-totals .....	21,104,469 <sup>r</sup>	1,196,239 <sup>r</sup>	22,300,708 <sup>r</sup>	20,358,668
Totals .....	33,386,423	5,079,029	38,465,452	35,798,407
<u>Eastern Europe</u>				
Poland .....	3,267,960	146,981	3,414,941	2,500,944
U.S.S.R. (Russia) .....	1,734,881	-	1,734,881	9,325,997
Totals .....	5,002,841	146,981	5,149,822	11,826,941
<u>Africa</u>				
Algeria .....	371,108	-	371,108	-
Congo .....	36,500	-	36,500	-
Ghana .....	110,824	-	110,824	-
Nigeria .....	-	-	-	300,533
Republic of South Africa ...	-	-	-	901,600
Sudan .....	-	-	-	36,195
Tanzania .....	-	-	-	106,425
Totals .....	518,432	-	518,432	1,344,753

See footnotes at end of table.



Cumulative Exports of Canadian Wheat(1) by Destination

Destination	August - October 1968			Total same period last year <sup>r</sup>
	Wheat (except durum)	Durum wheat	Total wheat	
bushels				
Asia				
China, Communist .....	22,603,673	-	22,603,673	2,956,091
Hong Kong .....	255,547	-	255,547	297,546
India .....	891,242	-	891,242	128,592
Indonesia .....	29,394	-	29,394	-
Iraq .....	12,860	-	12,860	-
Japan .....	11,905,749	115,742	12,021,491	8,595,356
Jordan .....	-	-	-	12,860
Lebanon .....	-	-	-	8,613
Malaysia .....	73,547	-	73,547	130,106
Pakistan .....	2,665,051	-	2,665,051	875,609
Philippines .....	-	-	-	196,000
Singapore .....	38,267	-	38,267	35,467
Syria .....	1,070,496	-	1,070,496	29,174
Turkey .....	32,518	-	32,518	-
Totals .....	39,578,344	115,742	39,694,086	13,265,414
Western Hemisphere				
Barbados .....	40	-	40	40
Cuba .....	1,712,200	-	1,712,200	1,120,331
Ecuador .....	154,933	-	154,933	150,656
El Salvador .....	-	-	-	56,933
Jamaica .....	183,965	-	183,965	2,542
St. Lucia .....	-	-	-	373
Venezuela .....	1,262,656	-	1,262,656	920,082
Totals .....	3,313,794	-	3,313,794	2,250,957
Sub-totals, all countries	81,799,834	5,341,752	87,141,586	64,486,472
Seed wheat(3) .....			45,679	179,137
Totals, all countries	81,799,834	5,341,752	87,187,265	64,665,609

(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 returns of Canadian elevator licensees and shippers and advice from American grain correspondents.

(3) Compiled from Canadian Customs returns, 1967 adjusted for time lag.

<sup>r</sup> Revised figures.

Customs Exports of Canadian Wheat Flour by Countries of Consignment

Destination	July	October	August-October	
	1968(1)	1968(2)	1968(2)	1967(1)
	bushels			
<u>Western Europe</u>				
EEC:				
Belgium and Luxembourg .....	2,100	-	11,254	26,434
Italy .....	2,070	2,070	4,140	4,945
Netherlands .....	-	-	58	5,060
Sub-totals .....	4,170	2,070	15,452	36,439
<u>Other Western Europe</u>				
Britain .....	236,192	137,367	644,248	788,596
Denmark .....	460	460	460	460
Gibraltar .....	2,576	-	2,576	-
Greece .....	-	-	1,656	30,424
Iceland .....	2,185	1,610	3,386	-
Ireland .....	2,576	-	2,576	644
Portugal .....	2,530	5,532	11,804	23,030
Sub-totals .....	246,519	144,969	666,706	843,154
Totals .....	250,689	147,039	682,158	879,593
<u>Eastern Europe</u>				
Yugoslavia .....	-	-	-	4,379
<u>Africa</u>				
Algeria .....	-	50,690	50,690	-
Angola .....	3,726	-	4,370	6,440
Cameroun Republic .....	10,822	460	17,722	14,453
Congo-Kinshasa .....	-	13,800	13,800	9,119
Dahomey .....	4,577	5,529	8,600	9,939
French Africa nes .....	-	3,450	3,450	-
Gambia .....	12,581	11,638	19,619	24,024
Ghana .....	61,826	208,265	629,480	565,508
Guinea Republic .....	12,650	-	76,774	-
Ivory Coast .....	-	-	-	1,840
Liberia .....	25,702	30,013	80,360	50,791
Malawi .....	5,279	4,542	14,637	18,653
Morocco .....	-	-	-	17,494
Mozambique .....	4,101	9,428	14,856	10,483
Portuguese Africa nes .....	2,737	17,234	28,274	6,302
Sierra Leone .....	2,758	149	5,253	1,771
Tanzania .....	-	-	-	3,450
Togo .....	24,562	24,743	58,507	39,629
Tunisia .....	-	-	-	2,222
Zambia .....	-	-	-	2,300
Totals .....	171,321	379,941	1,026,392	784,418
<u>Asia</u>				
Aden .....	-	-	-	2,061
Afghanistan .....	-	-	-	517
Behrain .....	-	-	-	117
Ceylon .....	-	2,220	830,091	12,678
Cyprus .....	412	-	412	-
Hong Kong .....	23,920	24,525	92,186	111,026
India .....	230	230	230	78,386
Indonesia .....	-	-	57,502	-
Iran .....	170	895	1,532	322
Iraq .....	-	-	15,721	-
Israel .....	-	-	78,046	543,837
Japan .....	978	517	770	1,546

See footnotes at end of table.

Customs Exports of Canadian Wheat Flour by Countries of Consignment

Destination	July 1968(1)	October 1968(2)	August-October	
			1968(2)	1967(1)
bushels				
Asia (concluded)				
Jordan .....	-	-	-	5,072
Lebanon .....	-	166,506	171,886	182,618
Philippines .....	-	1,012	1,012	-
Portuguese Asia .....	2,162	2,162	5,049	1,012
Qatar .....	-	-	396	287
Saudi Arabia .....	276	-	-	58,128
Syria .....	45,544	-	45,545	-
Thailand .....	18,860	14,448	46,007	63,839
Totals .....	92,552	212,515	1,346,385	1,061,446
Oceania				
British Oceania nes .....	-	414	2,650	1,150
Fiji .....	403	908	1,851	1,251
French Oceania .....	-	3,450	3,450	-
United States Oceania .....	3,450	-	6,909	18,400
Totals .....	3,853	4,772	14,860	20,801
Western Hemisphere				
Bahamas .....	23,009	12,117	67,427 <sup>r</sup>	77,094
Barbados .....	26,731	17,812	77,057 <sup>r</sup>	44,346
Bermuda .....	8,050	12,864	34,079	26,802
British Honduras .....	345	6,019	13,894	10,194
Costa Rica .....	-	-	-	1,835
Cuba(3) .....	1,095,987	1,108,920	2,785,178	2,571,927
Dominican Republic .....	460	-	23	690
Ecuador .....	-	-	345	-
El Salvador .....	-	232	232	143
French West Indies .....	1,727	-	1,842	3,838
Guatemala .....	1,150	-	1,150	1,150
Guyana .....	9,784	6,056	22,420	17,938
Haiti Republic .....	3,220	17,388	88,292	-
Honduras Republic .....	-	-	6,640	12,733
Jamaica .....	23,460	11,447	58,712 <sup>r</sup>	370,948
Leeward and Windward Is .....	79,078	44,586	211,165 <sup>r</sup>	218,378
Netherlands Antilles .....	8,259	3,620	25,106	42,842
Panama .....	-	564	1,486	20,737
Peru .....	-	1,552	9,602	11,270
Puerto Rico .....	-	-	-	96
St. Pierre and Miquelon .....	3,243	2,783	4,577	6,164
Surinam .....	772	101	1,750	3,300
Trinidad and Tobago .....	83,442	51,212	164,901	99,864
Venezuela .....	-	115	483	230
United States .....	49,413	35,765	137,588	97,189
Totals .....	1,418,130	1,333,153	3,713,949 <sup>r</sup>	3,639,708
Totals, all countries .....	1,936,545	2,077,420	6,783,744 <sup>r</sup>	6,390,345

(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.

<sup>r</sup> Revised figures.

nes - not elsewhere specified.



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

Class and grade	Week ending			
	November 8	November 15	November 22	November 29
cents and eighths per bushel				
<u>Initial payment to producers</u>				
1 Northern .....	170	170	170	170
2 Northern .....	166	166	166	166
3 Northern .....	162	162	162	162
4 Northern .....	155	155	155	155
5 Wheat .....	141	141	141	141
6 Wheat .....	137	137	137	137
Feed Wheat .....	133	133	133	133
1 C.W. Garnet .....	155	155	155	155
2 C.W. Garnet .....	150	150	150	150
3 C.W. Garnet .....	145	145	145	145
1 Alberta Red Winter .....	154	154	154	154
2 Alberta Winter .....	149	149	149	149
3 Alberta Winter .....	143	143	143	143
1 C.W. Amber Durum .....	170	170	170	170
2 C.W. Amber Durum .....	166	166	166	166
3 C.W. Amber Durum .....	162	162	162	162
<u>International Grains Arrangement and domestic sales</u>				
1 Northern .....	195/3	195/4	196/3	196/3
2 Northern .....	190/7	191	191/7	191/7
3 Northern .....	189/4	189/5	190/4	190/4
4 Northern .....	183/3	181/6	181/3	181/3
5 Wheat .....	180/3	178/6	178/3	178/3
6 Wheat .....	175/3	173/6	173/3	173/3
Feed Wheat .....	171/3	169/6	169/3	169/3
1 C.W. Garnet .....	182/3	181	180/3	180/3
2 C.W. Garnet .....	181/3	180	179/3	179/3
3 C.W. Garnet .....	180/3	179	178/3	178/3
1 Alberta Red Winter .....	182/3	181	180/3	180/3
2 Alberta Winter .....	181/3	180	179/3	179/3
3 Alberta Winter .....	180/3	179	178/3	178/3
1 C.W. Amber Durum .....	214	214/1	214	214
2 C.W. Amber Durum .....	212	212/1	212	212
3 C.W. Amber Durum .....	207	207/1	207	207
<u>(Basis in store Vancouver)</u>				
1 Northern .....	199/3	198/6	198/5	198/5
2 Northern .....	194/6	194/1	194	194
3 Northern .....	193/4	192/7	192/6	192/6
4 Northern .....	189/4	187/5	186/6	186/6
5 Wheat .....	187/4	185/5	184/6	184/6
6 Wheat .....	184/4	182/5	181/6	181/6
Feed Wheat .....	180/4	178/5	177/6	177/6
1 C.W. Garnet .....	189/4	187/7	186/6	186/6
2 C.W. Garnet .....	188/4	186/7	185/6	185/6
3 C.W. Garnet .....	187/4	185/7	184/6	184/6
1 Alberta Red Winter .....	189/4	187/7	186/6	186/6
2 Alberta Winter .....	188/4	186/7	185/6	185/6
3 Alberta Winter .....	187/4	185/7	184/6	184/6

# CANADIAN FLOUR MILLING SITUATION

**Production** Wheat flour production by Canadian mills during October 1968 amounted to 3,620,000 hundredweight indicating an increase of 17 per cent over the September 1968 total of 3,099,000 hundredweight, 8 per cent above the adjusted October 1967 figure of 3,360,000 hundredweight but 3 per cent lower than the ten-year (1958-67) average production for the month of October of 3,724,000 hundredweight. Mills reporting operations during October 1968 had a total rated capacity of 167,000 hundredweight per 24-hour day and on the basis of a 26-day working period 83.2 per cent of this rated capacity was effective.

Wheat milled for flour during October 1968 amounted to 8,173,000 bushels, 17 per cent higher than the 6,999,000 bushels milled during the preceding month and 8 per cent over the 7,538,000 bushels milled during October 1967. Of the wheat milled for flour during October 1968 some 6,891,000 bushels were Western Canadian spring wheat (other than Durum) while the remainder consisted of Ontario winter wheat (779,000 bushels); Durum (379,000 bushels); and all other (124,000 bushels).

**Exports** According to preliminary Customs returns, exports of Canadian wheat flour during October 1968 amounted to the equivalent of 2,077,000 bushels (some 903,000 hundredweight of flour) 15 per cent below the 2,437,000 bushels exported in September 1968 but 31 per cent greater than the adjusted October 1967 exports of 1,581,000 bushels. Flour shipments during the month went to forty-eight countries with exports to Cuba amounting to 1,109,000 bushels and accounted for 53 per cent of the October total. Other leading markets for Canadian wheat flour in terms of wheat during the month, with shipments in thousand of bushels were as follows: Ghana, 308; Lebanon, 167; Britain, 137; Trinidad and Tobago, 51; and Algeria, 51.

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

Crop year	Wheat Milled for flour	Wheat flour	
		Production	Exports(1)
	bushels		cwt.
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	10,498,360 <sup>r</sup>
1968-69(2)			
August .....	7,337,239	3,240,492	986,867
September .....	6,998,651	3,098,523	1,059,361 <sup>r</sup>
October .....	8,172,604	3,620,231	903,226
Totals .....	22,508,494	9,959,246	2,949,454
Same months 1967-68 <sup>r</sup> .....	22,506,321	10,006,226	2,778,411

(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.

<sup>r</sup> Revised figures.

UNITED STATES SITUATION

Supply Above  
Previous Year      Total domestic supplies of wheat in the United States for the 1968-69 crop year are currently placed 2,135.0 million bushels, 10 per cent above the previous year's total of 1,949.4 million reflecting increases in both production and carryover stocks. The 537.2 million bushels carried over at July 1, 1968 were 26 per cent above the 1967 stocks of 425.0 million while the current crop estimated at 1,597.9 million, exceeded by 5 per cent the 1,524.3 million of last year's outturn. Domestic disappearance during 1968-69 is estimated at about 685.0 million bushels, 5 per cent more than the 652.2 million last year. After deducting anticipated domestic requirements for the current United States crop year, some 1,450.2 million remain available for export and for carryover, an increase of 12 per cent over the 1,297.3 million in 1967-68.

Exports Below  
Previous Year      Exports of wheat and wheat flour in terms of grain equivalent during the period July-October 1968 amounted to 174.1 million bushels, 32 per cent less than the 257.2 million exported during the same months last year. The balance remaining on November 1, 1968 for export and for carryover was estimated at 1,276.1 million bushels compared with 1,040.1 million on the same date a year ago.

United States Wheat Supplies

Item	1967-68 <sup>r</sup>	1968-69 <sup>P</sup>
	million bushels	
Carryover at beginning of crop year (July 1) .....	425.0	537.2
Production .....	1,524.3	1,597.9
Total estimated domestic supplies .....	1,949.4	2,135.0
Imports of wheat and wheat flour in terms of wheat for domestic use, July - October .....	0.2	0.2
Total estimated supplies (1) .....	1,949.5	2,135.2
Less estimated domestic requirements for crop year (2) .	652.2	685.0
Available for export and for carryover .....	1,297.3	1,450.2
<u>Deduct</u>		
Exports of wheat as grain, July - October .....	246.4	155.6
Exports of wheat flour in terms of wheat, July - October (3) .....	10.8	18.5
Total exports of wheat and wheat flour (4) .....	257.2	174.1
Balance on November 1 for export and for carryover .....	1,040.1	1,276.1

(1) Excludes imports for November - June.

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

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

(4) Data include shipments for relief.

<sup>P</sup> Preliminary figures.

<sup>r</sup> Revised figures.



Wheat Marketing  
Allocation Program

A release on November 18, 1968 from the United States Department of Agriculture stated that domestic wheat marketing certificates are issued to eligible producers under the wheat programs. Wheat processors must acquire and surrender certificates prior to marketing food products produced from wheat. The Corporation purchases and sells wheat marketing certificates and records the surrender of such certificates by processors. The applicable legislation requires the Corporation to sell certificates to wheat processors at a price which is less than the cost of certificates bought by it.

As of September 30, 1968, certificates issued to producers under the 1968 program amounted to \$743,184,112 of which \$743,181,956 had been purchased by the Corporation. The resale value of certificates purchased was \$403,903,110. (The excess of the value of certificates issued to producers over the cost of certificates to wheat processors is recorded as wheat price support payments at the time the certificates are purchased by CCC.) The value of certificates acquired and surrendered by processors (net of refunds and adjustments) amounted to \$67,679,925. The resale value of certificates held by CCC and available for sale to processors was \$336,223,185.

Crop and Weather  
Conditions

The following extract has been taken from the November 25, 1968 Weekly Weather and Crop Bulletin published jointly by the United States Department of Commerce and the United States Department of Agriculture.

Winter wheat is in good condition in most of the Great Plains. The past week was dry with above average temperatures. Wheat did deteriorate in some areas as topsoil moisture became more scarce. Dryland wheat is suffering in Colorado and New Mexico. Wheat is generally in good condition in Kansas; although stands in some western areas are thin, short, and in need of moisture. Most Oklahoma wheat has emerged and is making good growth. Texas has 97 per cent of its intended wheat acreage seeded with satisfactory growth in most areas. Wheat in the Northern Plains is in good condition, but precipitation would be welcome.

Fall-seeded grains remain in good condition in Montana and are promising throughout the Northwest. Early-seeded grains show even stands in Oregon. Considerable planting is yet to be completed in western Oregon and throughout much of California.

Fall-seeded wheat in the eastern Corn Belt is showing good colour and full stands. Moisture is generally adequate. Small grains are making good progress in Kentucky. Seeding of wheat is 90 per cent complete in Tennessee and Virginia. Small grains have shown improvement the past 2 weeks in most South Central and Southeastern States. Recent rains have been very beneficial, but additional moisture is needed in part of the area. Seeding continues as weather permits.

United States Wheat Exports  
Decline as Flour  
Shipments Increase

total exports of wheat and flour reported for this period since 1959.

United States exports of wheat and wheat flour (grain equivalent) totalled 136 million bushels during July-September 1968, a 31 per cent drop from the similar period a year ago. This represented the smallest

Wheat grain shipments alone amounted to 122 million bushels compared with 188 million a year earlier — a decrease of 35 per cent. A sharp drop in exports to India and Pakistan was the main reason for this decline. Both countries were major food aid recipients in recent years, but have record food grain crops this season. Consequently, their immediate import needs are much reduced. Other countries showing significant decreases were Brazil, the United Kingdom, Yugoslavia, Japan, and Tunisia. In contrast, the Common Market countries, the Republic of China, Republic of Korea, Uruguay and Israel took larger quantities.

Wheat flour (grain equivalent) exports increased 69 per cent from the 8 million bushels shipped during the same period last year. The largest markets for flour were Ceylon, Republic of Korea, and South Vietnam. Other important markets were Bolivia, Israel, and Morocco. Increased shipments under the PL 480 program were mainly responsible for the increased flour exports.

United States Exports of Wheat and Flour (1) by Country of Destination  
July-September 1967 and 1968

Country of destination	July-September 1967			July-September 1968		
	Wheat	Flour(2)	Total	Wheat	Flour(2)	Total
thousand bushels						
<u>Western Hemisphere</u>						
Canada .....	(3)	5	5	(4)	13	13
Mexico .....	—	1	1	21	2	23
Costa Rica .....	392	22	414	853	7	860
El Salvador .....	377	22	399	860	30	890
Guatemala .....	503	57	560	673	43	716
Other Central America .....	739	163	902	1,226	118	1,344
Dominican Republic .....	778	2	780	1,176	48	1,224
Jamaica .....	2	203	205	—	153	153
Trinidad and Tobago .....	661	—	661	501	1	502
Other Bermuda and Caribbean .....	96	166	262	—	752	752
Bolivia .....	309	1,390	1,699	493	834	1,327
Brazil .....	14,937	109	15,046	8,070	253	8,323
Chile .....	1,540	35	1,575	1,544	283	1,827
Colombia .....	1,417	31	1,448	1,484	126	1,610
Peru .....	3,825	135	3,960	1,375	65	1,440
Surinam .....	44	91	135	58	80	138
Uruguay .....	—	—	—	3,698	—	3,698
Venezuela .....	7,771	2	7,773	7,259	3	7,262
Other South America .....	371	265	636	790	279	1,069
Totals .....	33,762	2,699	36,461	30,081	3,090	33,171

See footnotes at end of table.

United States Exports of Wheat and Flour (1) by Country of Destination  
July-September 1967 and 1968

Country of destination	July-September 1967			July-September 1968		
	Wheat	Flour(2)	Total	Wheat	Flour(2)	Total
thousand bushels						
<u>Western Europe</u>						
EEC:						
Belgium and Luxembourg .....	1,251	2	1,253	2,649	1	2,650
France .....	2,625	3	2,628	2,963	—	2,963
Germany, West .....	2,900	(4)	2,900	3,666	1	3,667
Italy .....	1,289	3	1,292	3,799	—	3,799
Netherlands .....	5,046	112	5,158	9,172	213	9,385
Totals .....	13,111	120	13,231	22,249	215	22,464
<u>Other Western Europe</u>						
Norway .....	702	2	704	362	4	366
Switzerland .....	734	—	734	1,688	—	1,688
United Kingdom .....	4,859	62	4,921	1,789	10	1,799
Others .....	363	143	506	272	182	454
Totals .....	6,658	207	6,865	4,111	196	4,307
<u>Eastern Europe</u>						
Poland .....	—	—	—	—	121	121
Yugoslavia .....	5,137	42	5,179	—	(4)	(4)
Totals .....	5,137	42	5,179	—	121	121
Totals, Europe .....	24,906	369	25,275	26,360	532	26,892
<u>Asia</u>						
Afghanistan .....	501	(4)	501	3	(4)	3
Ceylon .....	—	318	318	—	1,980	1,980
India .....	56,769	267	57,036	8,176	—	8,176
Israel .....	1,486	283	1,769	3,651	790	4,441
Japan .....	23,927	1	23,928	20,602	24	20,626
Jordan .....	—	57	57	896	314	1,210
Korea, Republic of .....	9,699	276	9,975	13,123	1,002	14,125
Lebanon .....	—	239	239	18	609	627
Nansei and Nanpo Islands .....	429	71	500	377	118	495
Pakistan .....	21,755	2	21,757	3,265	1	3,266
Philippines .....	6,456	149	6,605	6,235	188	6,423
Saudi Arabia .....	293	1,075	1,368	—	731	731
Republic of China (Taiwan) .....	2,660	34	2,694	5,284	—	5,284
Turkey .....	216	79	295	—	117	117
Vietnam, South .....	—	1,047	1,047	—	1,616	1,616
Others .....	345	241	586	688	1,505	2,193
Totals .....	124,536	4,139	128,675	62,318	8,995	71,313

See footnotes at end of table.



United States Exports of Wheat and Flour (1) by Country of Destination  
July-September 1967 and 1968

Country of destination	July-September 1967			July-September 1968		
	Wheat	Flour(2)	Total	Wheat	Flour(2)	Total
thousand bushels						
<u>Africa</u>						
Congo (Kinshasa) .....	1	322	323	—	438	438
Ghana .....	—	291	291	—	1	1
Morocco .....	209	135	344	16	704	720
Nigeria .....	1,061	—	1,061	1,279	14	1,293
Sierra Leone .....	295	112	407	282	4	286
Tunisia .....	2,295	11	2,306	912	46	958
United Arab Republic .....	864	34	898	—	—	—
Others .....	339	99	438	335	103	438
Totals .....	5,064	1,004	6,068	2,824	1,310	4,134
<u>Oceania</u> .....	—	26	26	—	25	25
Totals, all countries .....	188,268	8,237	196,505	121,583	13,952	135,535

(1) Data includes shipments for relief.

(2) Grain equivalent.

(3) Transshipments through Canada have been included in data for countries of ultimate destination.

(4) Less than 500 bushels.

According to the November 1968 issue of the "Wheat Situation" published by the United States Department of Agriculture .....

Export Outlook  
by Classes Mixed

Soft red winter wheat has been affected most by the general slowdown in exports. During July-September, shipments of soft red winter (grain only) were only one-fifth as large as in the same months of 1967. The 8.4 million bushels exported were about the same as in those months in 1961 and 1962 when annual exports totalled 56 million and 41 million bushels, respectively. White wheat and hard winter exports were each down by 20 million bushels. In contrast, exports of durum and hard spring were each up sharply. For the entire season, exports of both soft red and white wheats are likely to fall short of last year's record 125 million and 163 million bushels, respectively. Prospects for the hard wheats are mixed, although hard spring exports could work towards last year's 73 million bushels. Registrations of durum already exceed last year's total of 31 million bushels. The outlook for hard winter, while not quite as bright, still appears more favourable than prospects for soft wheats.

Wheat Prices  
Rise

Wheat prices averaged 4 cents per bushel below the national average loan of \$1.25 per bushel during July-October 1968. They started the season 6 cents under the loan, then rose in both September and October. The October farm price, at \$1.26 a bushel, thus represents an increase of 7 cents from the low. This is about the same increase that took place during July-October of last year when the farm price in July averaged \$1.37 per bushel, and hit its season's high of \$1.43 in October. From November 1967 to May 1968, the monthly farm price moved within a range of 6 cents per bushel, falling sharply to \$1.24 in June 1968.

Cash Wheat Prices on the Kansas City and Minneapolis Markets

No. 2 Hard Winter, Kansas City			No. 1 Northern Spring, Minneapolis		
Date	Price		Date	Price	
	cents per bushel			cents per bushel	
November 1, 1968	162 3/4		November 1, 1968	158 3/8 - 212 3/8	
4	138 1/4 - 168 1/4		4	158 3/8 - 212 3/8	
5	Election Day		5	Election Day	
6	166 1/2		6	157 1/4 - 210 1/4	
7	166		7	157 1/2 - 208 1/2	
8	147 - 157		8	157 - 208	
11	159 1/4 - 165 1/2		11	157 1/2 - 207 1/2	
12	N.A.		12	158 5/8 - 206 5/8	
13	155 1/4		13	159 5/8 - 207 5/8	
14	147 - 156		14	159 - 205	
15	140 1/4 - 170 (1)		15	159 5/8 - 205 5/8	
18	140 1/2 - 169 1/2 (1)		18	160 - 206	
19	143 1/2 - 168 3/4		19	159 - 205	
20	138 1/4 - 166 1/2		20	157 1/8 - 203 1/8	
21	156 5/8 - 202 5/8		21	156 3/4 - 202 3/4	
22	157 1/4 - 204 1/4		22	156 5/8 - 202 5/8	
25	159		25	157 1/4 - 204 1/4	
26	139 3/4 - 154 1/4		26	157 3/4 - 206 3/4	
27	161		27	157 7/8 - 204 7/8	
28	Thanksgiving Day		28	Thanksgiving Day	
29	141 1/4 - 158 1/4		29	157 - 204	

(1) Nominal. N.A. Not available.

Chicago Wheat Futures, High Points of Closing

Date	December	March	May	July	September
cents and eighths per bushel					
November 1, 1968	128/6	134/3	137/6	137/7	140/4
4	129	134/4	137/3	138	140/6
5			Election Day		
6	130/6	136/2	139/2	139/4	142/2
7	132/1	137/4	140/3	140/1	142/6
8	131/5	136/5	139/5	139/4	142
11	131/2	136/2	139/1	138/4	141/2
12	130/6	135/6	138/5	138/4	141/2
13	131/2	136/4	139/4	139/4	142/2
14	132	137/2	140/1	140	142/4
15	133	138/2	141/1	141/1	144
18	132/4	138/2	142	141/6	144/5
19	133	138/1	141/2	140/7	143/5
20	129/6	134/5	137/7	137/6	140/5
21	128/5	133/6	136/7	137	139/7
22	128/6	133/6	136/5	136/3	139/2
25	128/7	134	137	136/6	139/6
26	129/3	134/1	137/1	136/5	139/6
27	130/2	134/6	137/5	137	140
28			Thanksgiving Day		
29	129/4	134/3	137/3	137/3	140/2

# AUSTRALIAN SITUATION

Wheat Supplies      Total supplies of wheat in Australia for the 1967-68 crop year  
Lower Than      are estimated at 357.8 million bushels as against 483.2 million  
Previous Year      in 1966-67, reflecting the effect of a sharp decline in production,  
which more than offset a substantial increase in carryover stocks.

The current harvest, now estimated at 277.4 million bushels, is 41 per cent below the previous record of 466.6 million bushels harvested in 1966-67. Carryover stocks, at a record 80.4 million bushels, exceeded by a wide margin the 16.6 million at December 1, 1966. After deducting some 102.0 million bushels for anticipated domestic requirements, an estimated 255.8 million are available for export and for carryover during 1967-68, some 35 per cent below the 393.7 million in 1966-67.

Exports Decline      Combined exports of wheat as grain and wheat flour in terms of  
from Previous Year      grain equivalent during the period December 1 — November 2 of  
the current Australian crop year amounted to 193.0 million  
bushels, 31 per cent less than the 281.2 million exported during the corresponding  
ten months of the 1966-67 crop year. The balance remaining on November 3, 1968 for  
export and for carryover, at 62.8 million bushels, was in sharp contrast to the  
comparable 1967 total of 112.5 million.

## Australian Wheat Supplies

Item	1966-67 <sup>r</sup>	1967-68 <sup>p</sup>
	million bushels	
Carryover, including flour as wheat, at beginning of crop year (December 1) .....	16.6	80.4
Production .....	466.6	277.4
Total estimated domestic supplies .....	483.2	357.8
Less estimated domestic requirements for crop year .....	89.5	102.0
Available for export and for carryover .....	393.7	255.8
<u>Deduct</u>		
Exports of wheat as grain, December 1 — November 2 .....	265.6	175.8
Exports of wheat flour in terms of wheat, December 1 — November 2 .....	15.6	17.2
Total exports of wheat and wheat flour .....	281.2	193.0
Balance on November 3 for export and for carryover .....	112.5	62.8

<sup>p</sup> Preliminary figures.

<sup>r</sup> Revised figure.

The following information relative to the Australian situation has been extracted from a report from Mr. W. Boychuk, Assistant Commercial Secretary for Canada, Canberra, under date of November 15, 1968 and is reproduced with the permission of the Trade Commissioner Service, Department of Trade and Commerce. Where possible, conversions to Canadian measures and currency have been made for the convenience of our readers.



Record 1968-69 Crop in Sight. — Our last report (October 16, 1968), put the crop at 530 to 535 million bushels. This was based on end September crop estimates from the Bureau of Agricultural Economics (B.A.E.) and Primary Industry officials. Generally dry conditions during most of September resulted in this downward revision by some 20 million bushels from the crop figure of 550 million bushels which had been expected as likely in August. Good rains in early October have arrested the deterioration in the crop. However, since the middle of October some press reports indicate that lack of rain and sharp frosts in New South Wales and Victoria in particular have caused a sharp downward revision of official estimates. By the end of October the Australian Wheat Board released the following estimates of wheat receivals for the coming crop:

<u>State</u>	<u>Receival expected</u>		
New South Wales .....	170	million	bushels
Western Australia .....	97	"	"
Victoria .....	70	"	"
South Australia .....	65	"	"
Queensland .....	35	"	"
Total receival, 1968-69 harvest .	435	"	"

As approximately 30 million bushels are usually stored on farms, the Wheat Board estimate puts the crop at about 465 million bushels. Even allowing for the usual conservative bias in Wheat Board estimates, this represents a downward revision of more than 60 million bushels over a period of less than a month.

Wheat spokesmen in the various states are reported to be predicting substantially higher figures than these Board estimates, the discrepancy being explained by the extreme difficulty in assessing the extent of drought and frost damage.

We believe that, for reasons indicated further in this report, the Wheat Board has significantly underrated prospects for the coming crop. The following estimates, given to us by an official of the B.A.E., are based on the latest crop reports received on November 6:

<u>State</u>	<u>Estimated Production</u> million bushels	<u>Estimated acreage</u> million acres
New South Wales .....	210	10.0
Victoria .....	75	3.7
Western Australia .....	114	7.2
South Australia .....	82	3.7
Queensland .....	40	1.8
Totals .....	521	26.4

This 'unofficial' B.A.E. estimate is based on a more optimistic overall yield and on significantly higher acreages than had been assumed in the Wheat Board figures, particularly in South Australia and Western Australia. Nevertheless, it confirms the downward trend in the Wheat Board's estimates.

The harvesting season is about to begin. In the week beginning October 30 wheat started to pour into silos in north-western New South Wales at a rate of 37,000 bushels a day. Early reports say that the quality of the wheat is excellent,

mainly prime hard wheat and above f.a.q. bushel weight standards. North-western district farmers have reported a yield of up to two bags an acre more than they had expected. There have as yet been no official reports from New South Wales or from other State authorities on the progress of the new harvest.

First Wheat Payment Announced — A.\$1.10 Per Bushel (\$1.32 per bushel Canadian). — The Commonwealth Government has decided to maintain the first advance payment to wheatgrowers this season at A.\$1.10 per bushel (\$1.32 per bushel). This announcement came on November 4 after weeks of speculation that in view of the particular circumstances confronting the wheat industry this year, the first advance would be reduced from the usual A.\$1.10 per bushel (\$1.32 per bushel).

As mentioned in our last report, wheat industry spokesmen were concerned that the first payment, which normally represents about 70 per cent of total returns to growers, would be reduced to deter growers from planting larger acreages next season. In late October the Federal Treasurer, Mr. W. McMahon, addressing a wheatgrowers' conference in Canberra issued warnings about inflationary trends and stated that while he favoured continuance of the usual first payment he did not want to be pumping too much money into the economy and thus adding to inflationary pressures.

Mr. Anthony, the Minister for Primary Industry, explained further in the House:

'There is an annual problem for the Government in deciding the level of the first advance, and many things have to be considered, including the size of the overdraft and the ability of the Wheat Board to clear the overdraft within the 12-month period stipulated clearly by legislation. This depends on the volume of sales, both domestic and export; and the level of the home consumption and export prices; and the extent to which export sales are made on credit.'

When he finally announced the decision to maintain the level of the first advance, Mr. Anthony added a warning to the wheat industry:

'In deciding to maintain this rate for wheat from the 1968-69 harvest the Government took into account many special considerations, particularly drought losses by growers in three States last season.

'It was recognized these growers had unavoidably incurred more debts and they were heavily dependent on the first advance to enable them to recover.

'However, the authorization of the payment of A.\$1.10 a bushel (\$1.32 per bushel Canadian) is forthcoming because of exceptional circumstances. It is not something which growers can take for granted in the future.'

As stated by Mr. Anthony, an important consideration in the Government's decision was a serious financial squeeze which would face many smaller growers in the absence of a full first payment. Wheat is not subject to the first payment until officially received by the State Grain Elevator Boards which will not take responsibility for wheat held on farms. Wheat held on farms for which the Wheat Board cannot find storage would have to be financed by the growers themselves. (This fact was confirmed by a Government spokesman in Parliament last week.) Going on present estimates, there will be a considerable quantity of wheat in some States



for which no storage will be available. (Grain silo capacity is between 400 to 500 million bushels and this year's carryover will be about 40 million bushels.) This means that many growers will have to invest in appropriate farm storage and at the same time finance the wheat held on the farm. This financial strain would come at a time when many growers are reported to have incurred considerable debts as result of last year's drought.

According to press reports which the Department of Primary Industry has not yet been able to confirm, the Victorian Farmers' Union (V.F.U.) decided on November 8, 1968 to withdraw its objection to the Government's new wheat stabilization scheme. According to these reports the V.F.U. made it clear that it took this action reluctantly and only in order to prevent leaving the wheat industry in a state of chaos without a wheat board or legislation for orderly marketing of Australian wheat. By stepping into line with the rest of the industry the V.F.U. has thus removed the biggest obstacle to the passage of the wheat stabilization legislation which still requires approval by the Federal Senate (the debate is continuing) and passage of complementary legislation by State Parliaments. Primary Industry officials understand that only Tasmania and Western Australia have introduced the legislation so far. Unless the legislation is accepted by the Federal and State Parliaments by December 1, the usual date for the first advance payment, there could be a delay in the payment this year.

It should be noted that the first payment of A.\$1.10 (\$1.32 per bushel) was authorized before the V.F.U. withdrew its opposition to the new wheat stabilization scheme. It is likely that the outlook for first payment to be maintained at this satisfactory level has put considerable pressure on the V.F.U. to give up opposing the new stabilization scheme, if it has indeed decided to do so.

The downward revision of the crop estimate by the Wheat Board reported above came before the Government's announcement that it would maintain the level of the first payment. In view of Mr. McMahon's warning of inflationary pressures in the economy this lower estimate may have tended to lessen objections to maintaining the level of the first payment on grounds of national financial considerations. On the basis of the Wheat Board's revised lower estimate of 465 million bushels the Board's overdraft on the 1968-69 Pool would be around A.\$550 million (\$658 million Canadian), including an amount of about A.\$33 million (\$40 million) for storage, handling and administrative charges.

Australian Wheat Exports To Japan. — Wheat imports into Japan from Australia have increased steadily since 1963 when the Japanese switched part of their wheat purchases from Canada and the United States to soft wheats. In the last few seasons Australian sales have been boosted by the advent of competitive high protein Queensland 'prime hard' wheat. Japanese flour producers are said to have discovered Australian hard wheat to be of a better quality than they had at first expected, and in addition, according to one report, Queensland prime hard has been sold by the Japanese Food Agency for about \$ US6.56 a ton (\$7.04 Canadian) cheaper than comparable U.S. wheat. Australia's share of Japanese wheat imports in the period from April to September jumped from 12 per cent in 1967 to just under 20 per cent this year. (The share of the United States dropped from 56 to 45 per cent and Canada's share from 35 to 33 per cent in the same period.) The imports from Australia comprised:

#### Wheat for flour

New South Wales f.a.q. 31,842 tons (1,189,000 bushels).

Queensland prime hard 67,010 tons (2,502,000 bushels).



Wheat for feed

Queensland prime hard 69,792 tons (2,606,000 bushels).

Western Australian f.a.q. 200,080 tons (7,470,000 bushels), off grade 6,000 tons (224,000 bushels).

In view of the considerable share which they have gained in the Japanese market, Australian authorities are watching closely the emergence of Argentina and France as potential new competitors on the Japanese market. (Last month the Japanese Food Agency placed a trial order for 3,600 metric tons (132,000 bushels) of Argentine wheat and is reported presently considering authorizing a trial import from France.)

Exports of Australian Wheat and Wheat Flour in Terms of Wheat  
December 1 — November 2, 1967-68 and Corresponding Period 1966-67

Destination	Wheat		Wheat flour	
	1966-67	1967-68	1966-67	1967-68
	thousand bushels			
<u>Western Europe</u>				
EEC:				
Belgium .....	582	362	-	-
Germany, Federal Republic .	1,578	91	-	-
Netherlands .....	2,823	3,691	-	-
Sub-totals .....	4,983	4,144	-	-
<u>Other Western Europe</u>				
Britain .....	16,544	21,570	624	417
Ireland .....	1,406	1,624	-	-
Malta .....	353	737	-	-
Norway .....	4,205	2,051	-	-
Switzerland .....	80	10	-	-
Sub-totals .....	22,588	25,992	624	417
Totals .....	27,571	30,136	624	417
<u>Africa</u>				
Malawi .....	-	-	265	270
Mauritius .....	-	-	550	583
Mozambique .....	1,340	537	40	-
Rhodesia .....	2,365	2,957	-	-
South Africa .....	8,931	-	-	-
Sudan .....	915	422	-	-
Zambia .....	1,327	1,974	317	105
Others .....	10	12	107	300
Totals .....	14,888	5,902	1,279	1,258
<u>Asia</u>				
Aden .....	1,720	1,068	-	-
Aden and Aden I/T .....	-	-	508	272
Aden and Aden I/T Atta .....	-	-	338	185
Arabian Gulf .....	-	-	71	69
Arabian Gulf Atta .....	-	-	809	742

Exports of Australian Wheat and Wheat Flour in Terms of Wheat  
December 1 — November 2, 1967-68 and Corresponding Period 1966-67

Destination	Wheat		Wheat flour	
	1966-67	1967-68	1966-67	1967-68
thousand bushels				
<u>Asia (concluded)</u>				
Ceylon .....	11	442	6,404	7,089
China .....	99,128	65,814	-	-
Hong Kong .....	2,727	3,814	34	75
India .....	27,072	7,555	-	-
India Atta .....	-	-	749	-
Indonesia .....	-	-	1,374	2,800
Iran .....	1,026	-	-	-
Iraq .....	8,378	2,771	-	-
Japan .....	15,773	23,872	-	-
Korea North .....	3,804	-	-	-
Kuwait .....	2,286	1,979	-	-
Lebanon .....	6,007	1,764	-	-
Pakistan .....	18,548	-	-	-
Philippines .....	902	306	107	127
Saudi Arabia .....	3,151	489	123	243
Taiwan .....	740	772	-	-
Thailand .....	998	1,404	257	229
Malaysia				
Malaya .....	8,210	10,299	-	-
Sabah .....	-	-	25	20
Sarawak .....	-	-	28	31
Singapore .....	6,697	8,867	19	2
Others .....	852	454	107	147
Totals .....	208,030	131,670	10,953	12,031
<u>Oceania</u>				
New Zealand .....	2,105	1,101	-	-
<u>Western Hemisphere</u>				
Brazil .....	6,475	-	-	-
Chile .....	4,690	3,355	-	-
Peru .....	1,774	3,562	1	-
West Indies Area .....	-	-	359	492
Totals .....	12,939	6,917	360	492
<u>Pacific Area and Sundries</u>				
Pacific Islands .....	66	75	2,262	2,877
Ships' Stores and Sundries ..	-	-	125	124
Totals .....	66	75	2,387	3,001
Totals, all countries ..	265,600	175,800	15,600	17,200

ARGENTINE SITUATION

Wheat Supplies  
Above Previous Year      Total estimated supplies of wheat in Argentina for the 1967-68 (December-November) crop year are placed at some 288.3 million bushels some 18 per cent above the previous season's total of 243.3 million. Current crop year supplies consist of the December 1 carryover of 16.4 million compared with 13.8 million the year before, while the 1967 production, at 271.9 million, registered an increase over the 229.5 million harvested in 1966. After making an allowance of 155.5 million for anticipated domestic requirements, an estimated 132.8 million are available for export and for carryover in 1967-68, some 34 per cent more than the 99.1 million the previous year.

Exports Decline  
from Last Year      Preliminary exports of wheat and wheat flour in terms of wheat equivalent during December 1967 - October 1968 amounted to 75.2 million bushels, some 12 per cent less than the 85.4 million exported during the same eleven months in 1966-67. The balance remaining on November 1, 1968 for export and for carryover was estimated at 57.6 million bushels, in sharp contrast to the November 1, 1967 total of 13.7 million.

Argentine Wheat Supplies

Item	1966-67 <sup>r</sup>	1967-68 <sup>p</sup>
	thousand bushels	
Carryover at beginning of crop year (December 1) (1) ...	13.8	16.4
Production .....	229.5	271.9
Total estimated domestic supplies .....	243.3	288.3
Less estimated domestic requirements for crop year .....	144.2	155.5 <sup>r</sup>
Available for export and for carryover .....	99.1	132.8
<u>Deduct</u>		
Exports of wheat as grain, December - October .....	85.0	74.6
Exports of wheat flour in terms of wheat, December - October .....	0.4	0.5
Total exports of wheat and wheat flour .....	85.4	75.2
Balance on November 1 for export and for carryover .....	13.7	57.6

(1) Includes allowances for farm stocks.

<sup>p</sup> Preliminary figures.

<sup>r</sup> 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 November 19, 1968 and is reproduced with the permission the Trade Commissioner Service, Department of Trade and Commerce. Where possible conversions to Canadian measures and currency have been made for the convenience of our readers.



Weather and Crops. — The Argentine wheat crop has benefitted from favourable weather conditions during October including abundant rainfall throughout the grain belt.

Harvesting of wheat commenced in the northern marginal areas of Chaco and Santiago del Estero provinces, as well as in the north of Santa Fe and Cordoba, during October. The first yields were only fair and not indicative of the general condition of the crop. Harvesting is now underway in Santa Fe, Cordoba and Entre Rios provinces where slightly better yields are expected. Farther south, in the main wheat growing provinces of Buenos Aires and La Pampa, the crop will not be harvested until December, but the condition of the crop is good to excellent and a bountiful harvest is expected. There have been isolated frosts and hails and reports of leaf rust and insect infestations in some areas but so far there has been no serious general damage to the crop. Private estimates of production range between 9 and 9.5 million metric tons (330.7 million and 349.1 million bushels). Thus, there could be as much as 5 million tons (183.7 million bushels) available for export.

Late in October, the Secretariat issued the second estimate of the area sown to wheat of 6.6 million hectares (16.3 million acres). Durums account for 409,800 hectares (1.0 million acres) of this total. This compares with the Secretariat's first estimate of 6.4 million hectares (15.8 million acres) and is fractionally smaller than the final estimate of the area sown to wheat in 1967 of 6.6 million hectares (16.3 million acres). The planted area would no doubt have been much higher if there had not been drought conditions during the early part of the planting season.

Exports. — Also late in October, the Government announced a reduction in the export retention tax on wheat (including Durums) from 18 to 6 per cent. This tax is applied on the base index value for wheat of U\$55 (\$59 Canadian). The fixed export taxes on wheat totalling 5.3 per cent of the base index value are unchanged. The benefits of the lower export retention tax will accrue to the producer, rather than being reflected in the export price of wheat.

Prices. — Hard bread wheat prices during October fell from 1,500 pesos per 100 kilos, (\$1.26 per bushel) f.o.r. Buenos Aires, to only 1,410 pesos (\$1.18 per bushel) at mid-month, the lowest level of the year. By the end of the month prices had recovered to 1,480 pesos, (\$1.24 per bushel). Prices were firmer at Bahia Blanca, rising to 1,570 pesos (\$1.31 per bushel) from 1,470 pesos (\$1.23 per bushel) at the end of September.

At November 19, bread wheat prices were 1,485 pesos (\$1.24 per bushel) at Buenos Aires and 1,480 pesos (\$1.24 per bushel) at Bahia Blanca. Also at November 19, prices on the Buenos Aires Futures Exchange were 1,470 pesos per 100 kilos (\$1.24 per bushel) for December delivery; 1,480 (\$1.23 per bushel) for January; 1,497 (\$1.25 per bushel) for February and 1,515 (\$1.27 per bushel) for March.

Candeal (Durum) prices during October were steady at 1,920 pesos per 100 kilos (\$1.61 per bushel) f.o.r. Buenos Aires. At Bahia Blanca, Durum prices rose from 1,950 to 1,990 pesos (\$1.63 to \$1.67 per bushel). At November 19, Durum prices were 1,920 and 1,990 pesos per 100 kilos (\$1.61 and \$1.67 per bushel) f.o.r. Buenos Aires and Bahia Blanca, respectively.

# GRAIN SITUATION IN FEDERAL REPUBLIC OF GERMANY

The following account of the current grain situation in the Federal Republic of Germany has been extracted from a report received from Mr. R. Jahnen, Commercial Assistant (Agriculture) Canadian Embassy, Bad Godesberg, Germany, under date of November 13, 1968 and is reproduced with the permission of the Trade Commissioner Service, Department of Trade and Commerce.

Weather and Crops. — The outstanding feature of this year's weather during harvest time was: rain. Precipitations went up from 94 per cent of normal in July to 135 per cent in August and 198 per cent in September, and even in October, with 120 per cent, still hampered new sowings in most areas. However, particularly during the first decade of August, weather was much better in North Germany than it was in the South. As a result, the grain harvest in North Germany, where temperatures reached 29°C (approx. 84°F), went on better than anywhere else. The northern provinces took advantage of these favourable conditions; they not only harvested a better quality of grains than the southern areas, but also got their winter rape and winter barley sowings done in time.

Sowing Intentions. — The first official estimates of farmers' sowing intentions indicate that the area sown to winter wheat will be increased 3 per cent, compared with the crop year 1967-68. The area sown to winter rye will be 2 per cent smaller. Data on winter mixed grains are insufficient. Winter barley will occupy an 11 per cent larger area, and the winter rape area will be increased by approx. 30 per cent (full details not yet available, but Schleswig-Holstein with more than half the winter rape acreage announced an increase of 31 per cent, and Bavaria — another important oilseed producing province — an increase of as much as 51 per cent).

It is doubted that farmers will carry out their sowing intentions, with the exception perhaps of Schleswig-Holstein and Lower Saxony. While the area actually used for winter barley and winter rape is not likely to have reached the above targets, the area devoted to rye will have been reduced by more than 2 per cent. Sowings of winter wheat are still going on (under slightly improved weather and soil conditions). It must be remembered that a reduction in the winter wheat area if caused by bad weather can be made up by larger spring wheat sowings.

Wheat Quality. — In addition to our note of October 24, 1968, reporting on the first test results of this year's wheat quality, we now can give more details. These must be of particular interest as they influence the import requirements for so-called admixture wheats, i.e. high quality hard wheats, which cannot be grown in Germany.

## Test Results of 1904 Wheat Samples — Federal Republic (with the exception of Schleswig-Holstein and Saarland)

	<u>Protein Content</u>	<u>Sedimentation Rating</u>	<u>Wet Gluten Content</u>
1968 .....	10.8 per cent	18	19.6 per cent
1967 .....	10.6 " "	18	19.2 " "

While in 1966-67 only 4.6 per cent of the tested wheat samples showed sprouting (ranging from 0.1 to 20.8 per cent), this year the number of samples with sprouting exceeding 0.1 per cent was almost 64 per cent of the total of 1904 samples. The share of samples with sprouting exceeding 2 per cent was 12.3 per cent. It is



expected that the actual crop results are even worse.

The article of the Federal Research Institute for Grain Processing, published in the German Grain Paper and from which the above details have been taken, comes to the conclusion that a great deal of high quality wheats / hard wheats must be imported to improve the baking quality of the German wheats. Special mention has been made of the varieties "Jubilar", "Rubigus", and "Felix", which alone covered more than 37 per cent of the German 1967-68 wheat area: these varieties remained far behind the quality target for German baking wheat grade I. (This is a quality standard of a grading system which is about to be introduced; we shall report in due course).

#### CALENDAR OF WHEAT EVENTS

- November 4 The Canadian Wheat Board has entered into a contract with "Agrimpex", Hungarian Trading Company for Agricultural Products, covering the sale of 80,000 metric tons (2,939,000 bushels) of Canadian wheat to Hungary.
- 15 The Canadian Wheat Board is pleased to announce that under the provisions of the Third Long Term Agreement with China a further sales contract has been signed to provide for the export of one and one-half million long tons, 5 per cent more or less, of wheat which will be shipped principally from Pacific Coast ports December 1968 through July 1969.

Based on conditions at October 23 Canada's 1968 wheat crop was estimated at 649.8 million bushels, 10 per cent above last year's 592.9 million and 20 per cent more than the 10-year average of 540.4 million bushels.

According to a report from Mr. W. Boychuk, Assistant Commercial Secretary, Canberra, good rains in early October in Australia have arrested the deterioration in the crop. However, since the middle of October some press reports indicate that lack of rain and sharp frosts in New South Wales and Victoria in particular have caused a sharp downward revision of official estimates.

- 19 A report released from Mr. S.E. Kidd, Assistant Commercial Secretary (Agriculture), Buenos Aires, stated that the Argentine wheat crop has benefitted from favourable weather conditions during October including abundant rainfall throughout the grain belt.
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