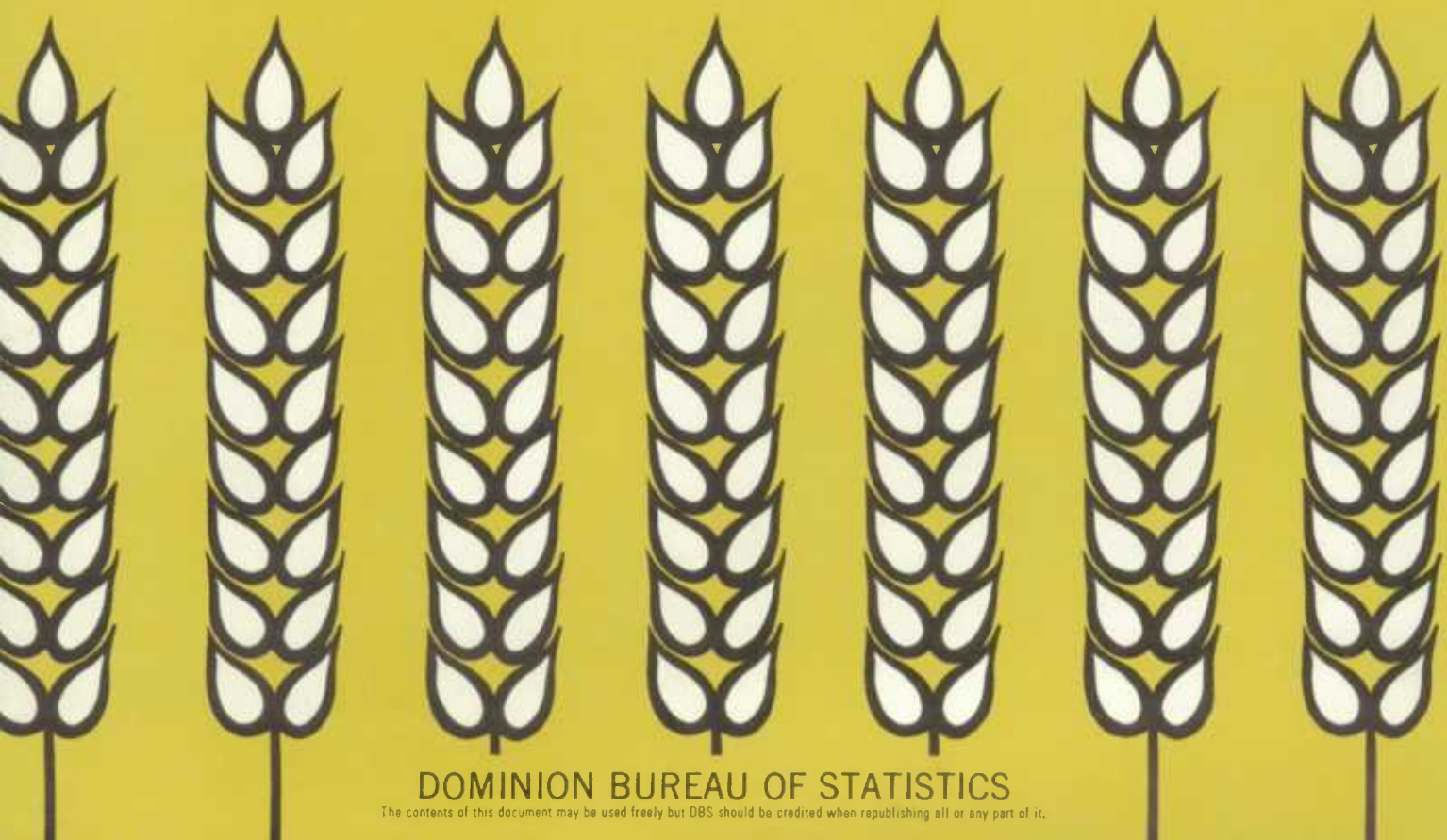


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The Wheat Review

APRIL 1969

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Agriculture Division

Crops Section

THE WHEAT REVIEW

APRIL 1969

Published by Authority of
The Minister of Industry, Trade and Commerce

June 1969
5502-502

Price: 30 cents
\$3.00 a year

Vol. 39—No. 9

TABLE OF CONTENTS

	<u>Page</u>
<u>World Wheat Situation</u>	
World Wheat Exports Lower than Previous Year	5
World Wheat Supplies Above Previous Year	5
Record World Breadgrain Crop in 1968 Confirmed	6
<u>Canadian Situation</u>	
Supplies Above Previous Year	8
August-March Exports Above Previous Year	8
Marketings, Disappearance and Visible Supplies	9
March 1969 Exports of Wheat and Flour Total 22.5 Million Bushels	9
Crop Conditions in the Prairie Provinces	10
General Quota Position	11
Lake Shipments of Canadian Grain	11
Wheat Shipments to the United States	12
Rail Shipments of Wheat to Maritime Ports	12
Farmers' Marketings of Wheat	13
Visible Supply of Canadian Wheat	14
Grading of Wheat Inspected, August 1968-March 1969 with Comparisons	14
Weekly Visible and Farmers' Marketings (chart)	15
Rail Shipments of Wheat from Fort William-Port Arthur	16
Overseas Exports of Canadian Grain by Ports of Loading	16
Shipments Under Feed Grain Assistance Regulations	17
Monthly Exports of Canadian Wheat and Wheat Flour	18
Exports of Canadian Wheat by Destination	19
Customs Exports of Canadian Wheat Flour by Countries of Consignment	22
Canadian Wheat Board Weekly Average Cash Wheat Prices	24
<u>Canadian Flour Milling Situation</u>	
Production and Exports	25
<u>United States Situation</u>	
Total Wheat Supplies Above Last Year	26
Exports Sharply Below Previous Year	26
Stocks of Wheat in all Positions April 1, 1969	27
1969-Crop Wheat County and Terminal Price-Support Rates Announced	28
Final Report on 1969 Wheat Program Signup Issued by USDA	28
Flour Production	28
Cash Wheat Prices on the Kansas City and Minneapolis Markets	29
Chicago Wheat Futures, High Points of Closing	29
<u>Australian Situation</u>	30
<u>Argentine Situation</u>	37
<u>Grain Situation in Britain</u>	40
<u>Calendar of Wheat Events</u>	41

WORLD WHEAT SITUATION

World Wheat Exports Lower than Previous Year

Total exports of wheat and wheat flour in terms of wheat from the four traditional major exporters during the August-March period of the current crop year have amounted to 728.1 million bushels, 21 per cent below the 916.1 million bushels exported during the same eight months in 1967-68 and 16 per cent lower than the ten-year (1957-58-1966-67) average shipments for the same period of 867.5 million. As indicated in the accompanying table, based on the Canadian crop year, shipments from Canada and Argentina were higher this year than last, while those from the United States and Australia were down sharply from the previous year.

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

August-March	United States	Canada	Argentina	Australia	Total
million bushels					
1950-51	198.3	135.9	54.4	80.3	468.9
1951-52	333.4	200.1	23.9	62.8	620.2
1952-53	233.0	224.7	6.0	56.7	520.4
1953-54	125.7	170.9	78.0	40.2	414.8
1954-55	188.1	172.7	92.2	62.8	515.8
1955-56	185.5	160.8	80.4	63.5	490.2
1956-57	356.3	178.0	62.8	97.6	694.7
1957-58	255.5	197.6	48.5	46.4	548.0
1958-59	297.2	188.5	61.7	50.4	597.8
1959-60	309.7	190.9	41.5	80.1	622.2
1960-61	447.8	205.8	55.4	108.6	817.6
1961-62	476.1	244.6	54.5	141.9	917.1
1962-63	379.1	212.0	43.8	96.5	731.4
1963-64	566.5	349.6	69.5	181.5	1,167.1
1964-65	454.4	264.9	102.8	132.6	954.7
1965-66	546.6	368.0	198.3	131.7	1,244.6
1966-67	508.0	338.9	70.3	157.2 ^r	1,074.4 ^r
1967-68 ^r	532.4	176.9	30.2	176.6	916.1
1968-69 ^P	317.6	206.6	75.1	128.8	728.1

^P Preliminary figures.

^r Revised figures.

World Wheat Supplies Above Previous Year

Supplies of wheat held by the four traditional major exporters at April 1, 1969 for export and for carryover at the end of their respective crop years amounted to 2,434.4 million bushels 34 per cent above the 1,820.3 million at the same time a year ago. Although supplies were smaller in Argentina this decrease was more than offset by increases in the totals for the United States, Canada and Australia. Supplies at April 1, 1969, in millions of bushels, were held as follows, with last year's comparable figures in brackets: United States, 989.8 (705.5); Canada, 943.7 (824.7); Argentina, 62.9 (103.0); and Australia, 438.0 (187.1).

Record World Breadgrain
Crop in 1968 Confirmed

According to the April 1969 edition of World Agricultural Production and Trade, published by the United States Department of Agriculture world wheat and rye production in 1968 totalled 340 million metric tons, according to the third estimate of the Foreign Agricultural Service.

World wheat production in 1968 is estimated at a record 309 million tons, 11 per cent above 1967 and 8 per cent over 1966, the previous high. The world wheat harvest has increased 25 per cent in the last three years and the 1968 harvest was 33 per cent over the 1960-64 five-year average. Increased acreage, good weather, price assurances, and special programs have expanded wheat harvests around the world. The 1968 world wheat area reached a new high of 543 million acres, 2 per cent larger than in 1967 and 8 per cent greater than the 1960-64 average. A record wheat yield, of 20.9 bushels per acre, was 3 per cent above the 1966 high and represented a gain of 24 per cent over the earlier 5-year level.

North American wheat production, at 62.7 million tons, was up 5 per cent, with the United States and Mexico having record crops. The Canadian harvest was up 10 per cent although well below the 1966 record. Generally good weather prevailed in the United States which resulted in a 42.7 million-ton crop, 3 per cent over the 1967 high. U.S. acreage was off 6 per cent, but the yield was up 10 per cent to a record 28.4 bushels per acre. Mexico's 2.2 million-ton outturn was 7 per cent over the 1967 high and 40 per cent over the 5-year average, although acreage was below that in 1960-64. Increased irrigation, and improved seed combined with other factors have raised Mexican yields to the point that the country is now in an excess supply position.

South American wheat production totalled 8.6 million tons, 9 per cent below the previous year. Argentina provided the biggest change with a crop of 5.9 million tons, down 19 per cent and well below average. Favourable early season prospects were cut sharply by drought during the filling stage and heavy rains at harvest time. The Chilean and Peruvian crops were also reduced by drought. Brazil, on the other hand, harvested an estimated 700,000-ton crop, nearly double the 1967 outturn. The crop improvement "package," including seed, fertilizer, pesticides and grower incentives, contributed to the good performance. However, the lack of high humidity and heavy rainfall that traditionally plague Brazilian wheat production is credited as the dominating factor. Uruguay recovered with a good harvest after the disasters of 1967.

The West European crop totalled 47.1 million tons, one per cent over the 1967 record. The Common Market harvested a record 31.9 million tons of this total, 3 per cent above 1967 and 22 per cent over the 1960-64 outturn. France and West Germany had record crops, up 6 and 6.5 per cent, respectively. They exceeded their 1960-64 levels by 26 and 31 per cent. Italian production at 9.3 million tons was down 3 per cent due to moisture shortage. French and Italian 1968 wheat acreages were each 4 per cent below the 1960-64 averages. In contrast, the West German area was at a new high and 5 per cent over the 5-year average. Spain harvested a 5.5 million-ton crop, down 2 per cent as area was reduced 7 per cent, under a Government program to control over-supply. The United Kingdom crop, at 3.5 million tons, was down 10 per cent, a result of wet weather throughout the latter half of the season. Acreage, however, was 5 per cent above 1967 and 17 per cent over the 5-year average. Drought cut Greek production by 18 per cent, to 1.5 million tons.

East European wheat production in 1968 totalled 24.4 million tons, down 3 per cent, as area increased 5 per cent. Dry weather reduced the Romanian crop by 17 per

cent to 4.8 million tons and the Yugoslav crop by 9 per cent to 4.4 million tons. Both countries had larger acreages. In contrast, with good weather Poland and Czechoslovakia showed increases of 18 and 24 per cent. The Polish 1968 wheat area was 28 per cent larger than the 1960-64 average. Similarly, the East German area was 32 per cent larger and the Czechoslovak 49 per cent. These increases largely represent shifts from areas traditionally planted to rye.

The wheat harvest in the Soviet Union is estimated at 78.5 million tons, 23 per cent over 1967, and second only to the record 85 million ton crop in 1966. An excellent spring crop more than offset a sizeable loss in the winter crop due to drought. Recent information indicates that high moisture at harvest time for spring wheat was a serious factor and that storage problems were acute. The large crop, however, has undoubtedly enabled the Soviets to obtain a comfortable supply position.

African wheat production is placed at 7.4 million tons, 26 per cent above the good 1967 crop. Excellent weather resulted in record harvests for Algeria, Morocco and South Africa. The Asian wheat crop is estimated at 65.0 million tons, 11 per cent over the 1967 level. Record harvests in India, Pakistan, Iran and Afghanistan accounted for most of the gain. These countries were all operating under special production programs and generally enjoyed unusually good growing conditions. The Turkish crop at 8.4 million tons was down 7 per cent because of drought. Australia harvested an all-time record 14.5 million tons of wheat, as compared with the 7.5 million ton drought-plagued crop a year earlier. This was 14 per cent above the previous 1966 high and was achieved on a record 26.4 million acres. The 1968 crop was 75 per cent larger than the 1960-64 average, while acreage had gained 67 per cent over the same period.

World rye production in 1968 totalled 31.8 million tons, up 5 per cent. Yield at a record 22.8 bushels per acre gained 7 per cent, and area at 54.8 million acres was down 2 per cent. The downtrend in rye acreage is generally compensated by increased yield, so that production held relatively stable. In 1968 acreage showed a decline of 21 per cent from the 1960-64 average, while yield gained 25 per cent, and production was only 2 per cent below the 5-year average. Production in North America showed little change for 1968 and totalled 921,000 tons. The Canadian crop at 331,000 tons was up 9 per cent on improved yield. The United States harvest at 590,000 tons was down 4 per cent, while yield advanced 2 per cent to a record 23.1 bushels per acre. Argentina produced 360,000 tons of rye on slightly larger acreage, an increase of 2 per cent.

West European production at 5.5 million tons was up 2 per cent while area declined 4 per cent. The EEC crop was unchanged at 3.9 million tons. West Germany harvested a slightly larger crop at 3.2 million tons on a record yield of 52.8 bushels per acre. The West German 1968 rye acreage showed an 18 per cent decline from the 1960-64 average. East European rye production totalled 11.8 million tons, up 8.5 per cent, with a 7 per cent gain in yield. The Polish harvest at 8.6 million tons gained 12 per cent on improved yield. The East German crop was off slightly at 2.0 million tons and the Czechoslovak crop was up 10 per cent at 761,000 tons. Poland's rye area was off 7 per cent as compared with the 1960-64 average, the East German dropped 14 per cent, and the Czechoslovak declined 22 per cent.

Rye production in the Soviet Union is estimated at 12.4 million tons, up 3 per cent. The Soviet rye area at 29.7 million acres was down 3 per cent, and was 26 per cent below the 1960-64 average. The Turkish rye crop is placed at 780,000 tons, down 5 per cent as dry weather reduced the yield.

CANADIAN SITUATION

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

August - March Exports Above Previous Year Exports of wheat and flour in terms of wheat equivalent amounted to 206.6 million bushels during the first eight months of the current crop year, 17 per cent above the previous year's corresponding total of 176.9 million but 19 per cent below the ten-year (1957-58-1966-67) average for the period of 256.1 million bushels. This year's exports consisted of 189.4 million bushels of wheat in bulk, 339 thousand of seed and 16.9 million of flour in terms of wheat. During the comparable period last year these figures were 158.9 million of wheat in bulk, 621 thousand of seed and 17.3 million of flour in wheat equivalent. The balance remaining on April 1, 1969, for export and for carryover amounted to 943.7 million bushels, 14 per cent above the April 1, 1968, total of 824.7 million.

Canadian Wheat Supplies

Item	1967-68 ^r	1968-69 ^P
	million bushels	
Carryover in North America at beginning of crop year (August 1)	576.8	665.5
Production	592.9	649.8
Total estimated supplies	1,169.7	1,315.4
Less estimated domestic requirements for crop year ...	168.2	165.0
Available for export and for carryover	1,001.5	1,150.4
<u>Deduct</u>		
Exports of wheat in bulk, August - March (1)	158.9	189.4
Exports of seed wheat, August - March (2)	0.6	0.3
Total exports of wheat as grain	159.5	189.7
Exports of wheat flour in terms of wheat, August - March (2)	17.3	16.9
Total exports of wheat and wheat flour	176.9	206.6
Balance on April 1 for export and for carryover	824.7	943.7

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

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

P Preliminary figures.

r Revised figures.

Marketings, Disappearance
and Visible Supplies

Total primary deliveries of wheat (both east and west) up to April 23 of the current crop year have amounted to 243.0 million bushels in contrast to 325.7 million

marketed during the same period of the previous year. Some 31.2 million bushels of this year's total were delivered during the five weeks March 19 to April 23, 1969. During the same period the volume of Canadian wheat entering domestic and export channels amounted to 19.4 million bushels. As a result, the total visible supply of Canadian wheat increased from 395.6 million at March 19, 1969 to a level of 406.6 million at April 23, 1969.

The total visible supply of Canadian wheat at April 23 this year represented a decrease of 10 per cent from the 1968 comparable total of 450.1 million but was 31 per cent more than the 1967 figure of 311.5 million. Country elevator stocks, amounting to 253.2 million bushels, were 2 per cent less than the 1968 comparable total of 258.8 million but 58 per cent more than the 160.4 million of two years ago. Wheat stocks at interior terminals at April 23, 1969, totalled 8.7 million bushels considerably below both the 13.4 million of a year ago and the 13.5 million of two years ago. The 14.1 million bushels "in transit rail" (western division) were below both the 1968 figure of 20.1 million and the 17.1 million of 1967. Supplies at the Lakehead, totalling some 43.1 million bushels, were 33 per cent smaller than the 64.7 million at April 24, 1968 and 29 per cent lower than the 60.8 million at April 26, 1967. The 4.8 million bushels "in transit lake" were below both the 5.3 million in this position in 1968 and the 7.7 million at the same date in 1967. The 24.1 million bushels in Bay, Lake and Upper St. Lawrence ports were less than the 25.4 million of a year ago but above the 10.8 million of two years ago. Supplies in Lower St. Lawrence and Maritime ports at April 23, 1969, at 31.9 million bushels, registered a 23 per cent decrease from the comparable 1968 figure of 41.2 million but 52 per cent more than the 21.0 million of 1967. The 16.1 million bushels in West Coast ports (Vancouver-New Westminster, Prince Rupert and Victoria) were higher than the 10.8 million at April 24, 1968 and more than the 11.5 million at the same date in 1967.

March 1969 Exports
of Wheat and Flour Total
22.5 Million Bushels

Combined exports of wheat in bulk, seed wheat and wheat flour in terms of grain equivalent, during March 1969 amounted to 22.5 million bushels, 14 per cent below the 26.2 million of the previous month, 7 per cent below the

24.2 million of March 1968 and 13 per cent smaller than the ten-year (1958-67) average for the month of March of 26.0 million. Exports of wheat in bulk (as reported by the Board of Grain Commissioners) during March 1969 totalled 19.9 million bushels, 18 per cent less than the February 1969 total of 24.1 million, and registered decreases of 7 per cent and 9 per cent, respectively, from the 21.4 million of the same month a year ago and the ten-year average of 21.8 million. Based on Canadian Customs returns, the equivalent of 2.5 million bushels of wheat was exported in the form of flour during March 1969, some 27 per cent above the previous month's figure of 2.0 million, but 3 per cent smaller than the adjusted total of 2.6 million of March 1968 and 23 per cent less than the ten-year average of 3.3 million bushels.

Cumulative exports of wheat in bulk during the August-March period of the current crop year amounted to 189.4 million bushels, 19 per cent more than the 158.9 million shipped during the first eight months of 1967-68 but 17 per cent less than the ten-year average for the period of 228.8 million. Communist China and Britain were the two leading markets for Canadian wheat in bulk during the first eight months of the current crop year with shipments to these countries amounting to 46.1 million and 42.9 million bushels, and accounted for 24 per cent and 22 per cent, respectively, of the August-March total. During the same period last year Communist China accounted

for 12 per cent and Britain 27 per cent of the August 1967-March 1968 total. Other principal importers of Canadian wheat for the first eight 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, 25.9 (24.0); India, 14.4 (0.1); Italy, 9.0 (5.5); Federal Republic of Germany, 8.4 (12.2); Netherlands, 5.2 (4.2); Belgium and Luxembourg, 5.1 (6.8); Switzerland, 4.5 (1.4); and Poland, 3.4 (2.5). Cumulative exports of seed wheat during August-March of the current crop year, based on Canadian Customs returns, amounted to 339 thousand bushels compared with last year's comparable total (adjusted to remove time lag) of 621 thousand.

Cumulative exports of wheat flour during the first eight months of the 1968-69 crop year, based on Customs returns, were the equivalent of 16.9 million bushels of wheat, a decline of 2 per cent from the adjusted August-March 1967-68 total of 17.3 million. Cuba's purchases, the leading market for Canadian wheat flour during the period under review, amounted to the equivalent of 8.0 million bushels and accounted for 47 per cent of the August 1968-March 1969 total. During the comparable period of 1967-68 shipments to Cuba amounted to 7.8 million and accounted for 45 per cent of the eight-month total. Other principal markets for Canadian wheat flour in terms of grain equivalent during the August-March period of the 1968-69 crop year, with revised data for the same months of the preceding crop year in brackets, were as follows, in thousands of bushels: Britain, 1,819 (2,123); Ghana, 1,125 (1,069); Ceylon, 839 (860); U.A.R.-Egypt, 752 (nil); and Leeward and Windward Islands, 557 (551).

Crop Conditions in
the Prairie Provinces

According to the Telegraphic Crop Report published under date of May 21, 1969, crop conditions in each of the Prairie Provinces were summarized as follows:

Cool, showery weather in many areas of Manitoba this past week has delayed field operations. Abundant to excessive moisture in some areas has slowed activity on all but lighter soils and on high lands. Seeding will become increasingly general this week, although slow growth in wild oats has delayed spraying and field operations. Seeding of wheat is varied, ranging from 10 to 50 per cent in some districts. Some minor frost damage occurred in northern districts and may affect some early-emerged wheat. Good drying weather is required to improve fields and hasten seeding. Pastures and hay lands are progressing favourably.

In Saskatchewan scattered rains, snow and lower temperatures have curtailed seeding operations. For the province as a whole, 40 per cent of the intended wheat acreage has been sown and 25 per cent of the acreage of the other principal grains. Work is most advanced in the southwestern part of the province with about 80 per cent of the wheat sown. In the south-central districts, 40 to 50 per cent of the seeding has been done while in the west-central part of the province about 20 to 30 per cent of the crop is in. Moisture conditions are good and satisfactory cultural control of weeds is generally being achieved.

Weather conditions at mid-May were very favourable in Alberta. Showers on May 12 and 14 provided needed moisture in local areas but interrupted seeding progress. Wild oats have made a good showing this week and most farmers have delayed seeding operations hoping for a good weed kill. Pasture conditions and hay prospects are generally reported as good to excellent. There have been some scattered reports of hail damage on sugar beets.

General Quota Position By May 5, 1969 out of a total of 1,827 shipping points in the Western Division, the Canadian Wheat Board had placed 677 points on a delivery quota of four bushels per specified acre, 555 points on a three-bushel quota, 347 points on a two-bushel quota and 184 points on a one-bushel quota. Some 53 points remained on the initial unit quota while only 11 stations were reported as "closed".

Summary of Elevator Shipping Points in the Western Division
as at April 21, 1969

Province	Initial unit quota	General quota in bushels per specified acre				Closed	Total
		One	Two	Three	Four		
Ontario	—	—	—	—	—	1	1
Manitoba	53	93	66	70	42	—	324
Saskatchewan	—	91	271	299	322	7	990
Alberta	—	—	10	186	307	3	506
British Columbia	—	—	—	—	6	—	6
All provinces	53	184	347	555	677	11	1,827

Lake Shipments of Canadian Grain Total shipments of the five major grains out of Lakehead terminals from the opening of navigation to April 23 this year amounted to 19.5 million bushels, 39 per cent above the 14.0 million shipped during the same period in 1968. In 1969 the season of navigation opened on April 11 while the 1968 season opened on April 10. Shipments of wheat, at 15.0 million were 42 per cent above the 1968 figure of 10.5 million bushels and accounted for 77 per cent of the total.

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

Year	Wheat	Oats	Barley	Rye	Flaxseed	Total
thousand bushels						
1958	8,446	2,490	7,363	250	203	18,752
1959	4,011	386	587	—	87	5,071
1960	13,270	726	1,127	413	288	15,824
1961	25,855	3,434	4,073	433	650	34,445
1962	2,421	1,452	1,170	—	292	5,335
1963	10,552	2,306	1,056	136	278	14,327
1964	20,586	2,989	2,318	154	433	26,479
1965	—	—	—	—	—	—
1966	31,910	3,154	2,567	1,335	1,016	39,981
1967	8,708	3,616	4,868	398	454	18,043
1968	10,504	1,620	1,770	75	—	13,969
1969	14,961	1,762	2,301	186	264	19,474

Wheat Shipments to
the United States

There were no vessel and rail shipments of wheat to the United States, either for re-export or retention for domestic use, from the beginning of the current crop year to April 23, 1969. During the comparable periods of 1966-67 and 1967-68 shipments amounted to 4 thousand and 55 thousand bushels, respectively.

Wheat Shipments* to the United States by Destination
August 1, 1968 - April 23, 1969 with Comparisons

Destination	1966-67	1967-68	1968-69
		bushels	
<u>By Rail</u>			
U.S.A. domestic points	54,915	4,357	—
Totals, shipments	54,915	4,357	—

* Either for re-export or retention for domestic use. Excluding seed wheat.

Rail Shipments of
Wheat to Maritime
Ports

Rail shipments of wheat to Maritime ports from Bay, Lake and Upper St. Lawrence ports during August 1968-March 1969 amounted to 16,044,000 bushels compared with the August-March 1967-68 figure of 10,827,000.

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

Origin of shipments	August 1, 1967- March 31, 1968	August 1, 1968- March 31, 1969
		bushels
Port McNicoll	3,940,013	4,305,831
Midland, Tiffin	2,371,831	4,563,424
Collingwood	366,430	63,817
Owen Sound	2,113,813	2,315,547
Goderich	1,298,836	1,686,526
Sarnia	726,274	1,265,504
Port Colborne	9,383	1,843,418
Totals	10,826,580	16,044,067

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

Week ending		Manitoba	Saskatchewan	Alberta	Total	Last year ^r
bushels						
August	7, 1968	12,286	343,145	1,256	356,687	3,531,842
	14	54,003	433,143	19,546	506,692	410,477
	21	701,320	618,402	734,805	2,054,527	2,368,907
	28	319,028	1,772,613	649,209	2,740,850	5,893,733
September	4	248,115	2,325,413	840,579	3,414,107	14,505,278
	11	146,995	1,597,665	749,639	2,494,299	19,166,857
	18	386,716	4,847,811	2,241,941	7,476,468	12,002,246
	25	560,570	4,814,363	1,744,398	7,119,331	12,262,382
October	2	578,728	4,171,612	1,148,224	5,898,564	8,987,247
	9	1,412,243	6,689,883	3,152,542	11,254,668	5,351,929
	16	914,936	4,950,252	1,904,238	7,769,426	7,247,758
	23	827,874	4,038,282	1,889,876	6,756,032	7,562,502
	30	831,989	5,268,762	4,080,886	10,181,637	9,262,642
November	6	1,653,791	7,100,994	4,580,760	13,335,545	9,717,801
	13	2,037,836	9,768,838	3,876,116	15,682,790	8,840,798
	20	2,099,771	7,917,084	3,227,126	13,243,981	11,217,381
	27	1,661,638	5,918,922	2,334,940	9,915,500	10,032,019
December	4	1,454,530	5,283,400	2,524,710	9,262,640	13,270,298
	11	924,844	3,683,325	1,936,615	6,544,784	15,836,937
	18	886,759	3,627,473	1,257,373	5,771,605	9,311,891
	23	819,810	3,417,705	1,647,864	5,885,379	6,742,989
	31	405,023	1,773,314	1,050,722	3,229,059	7,572,454
January	8, 1969	367,174	2,544,883	1,452,240	4,364,297	4,968,322
	15	416,690	1,351,887	1,047,114	2,815,691	5,554,999
	22	567,950	1,139,430	1,019,662	2,727,042	18,411,991
	29	280,390	814,599	587,479	1,682,468	10,617,794
February	5	255,056	465,482	703,518	1,424,056	5,548,689
	12	485,168	2,509,965	2,902,341	5,897,474	10,319,185
	19	544,539	3,121,188	2,416,389	6,082,116	8,222,761
	26	763,276	3,905,593	2,248,441	6,917,310	4,789,373
March	5	846,130	2,958,912	2,043,881	5,848,923	7,453,488
	12	959,884	4,911,870	2,724,281	8,596,035	6,525,279
	19	975,957	4,280,914	2,985,665	8,242,536	8,254,395
	26	927,805	4,944,237	2,787,007	8,659,049	7,814,669
April	2	772,624	3,472,361	2,342,123	6,587,108	5,208,385
	9	479,651	2,498,795	1,847,450	4,825,896	5,139,919
	16	382,006	1,191,820	2,432,215	4,006,041	3,987,431
	23	497,967	4,403,412	2,222,129	7,123,508	6,124,617
Totals		28,461,072	134,877,749	73,355,300	236,694,121	320,037,665
Average similar period: 1957-58 —						
1966-67		33,214,487	166,454,579	73,087,815	272,756,881	

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

^r Revised figures.

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

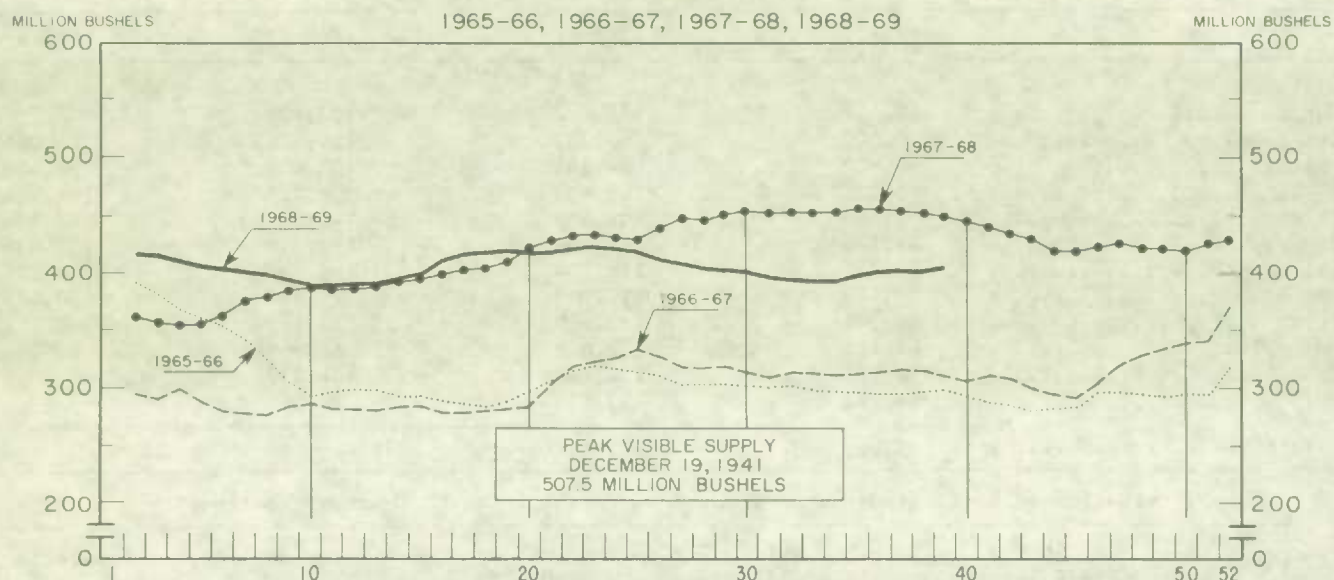
Position	1967	1968	1969
	thousand bushels		
Country elevators - Manitoba	14,549	33,778	34,466
Saskatchewan	97,258	150,725	146,870
Alberta	48,630	74,281	71,842
Sub-totals	160,437	258,784	253,178
Interior private and mill	6,259	5,719	5,320
Interior terminals	13,522	13,450	8,730
Vancouver-New Westminster	10,768	9,186	13,856
Victoria	454	873	911
Prince Rupert	249	791	1,372
Churchill	944	4,593	4,694
Fort William-Port Arthur	60,814	64,663	43,096
In transit rail (western division)	17,064	20,112	14,121
Bay, Lake and Upper St. Lawrence ports	10,798	25,392	24,099
Lower St. Lawrence and Maritime ports	21,000	41,202	31,888
In transit lake	7,659	5,277	4,809
In transit rail (eastern division)	1,543	107	508
Totals	311,511	450,149	406,582

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

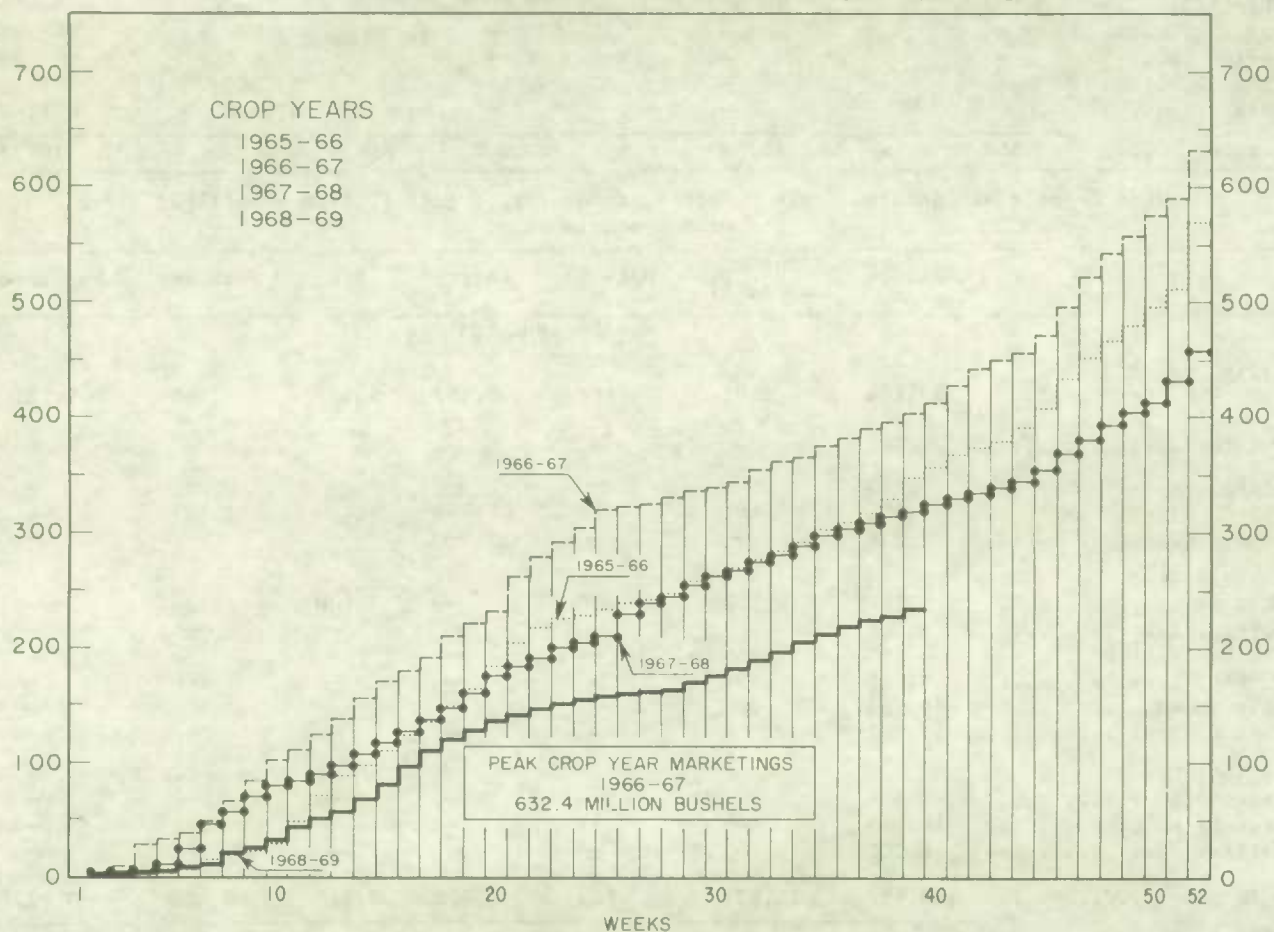
Grade	Crop year		August - March			
	Average	1967-68	1967-68		1968-69	
	1962-63					
	1966-67					
	per cent	per cent	cars	per cent	cars	per cent
No. 1 Man. Northern	5.1	27.9	27,279	21.8	20,544	15.6
No. 2 Man. Northern	35.8	43.4	57,940	46.3	45,823	34.8
No. 3 Man. Northern	22.7	14.8	18,584	14.8	10,969	8.3
No. 4 Man. Northern	10.5	3.0	4,408	3.5	2,549	1.9
No. 5 Wheat	4.5	0.4	547	0.4	1,923	1.5
No. 6 Wheat	0.6	0.1	247	0.2	118	0.1
Feed Wheat	(1)	(1)	33	(1)	18	(1)
Others Red Spring	13.3	4.0	6,015	4.8	38,631	29.4
C.W. Garnet	0.2	0.3	325	0.3	123	0.1
C.W. White Spring	0.1	0.1	221	0.2	167	0.1
C.W. Mixed Wheat	0.1	0.1	99	0.1	80	0.1
Alberta Winter	0.7	1.0	928	0.7	748	0.6
Nos. 1-6 C.W. Amber Durum.	5.8	4.7	8,293	6.6	5,067	3.9
Others C.W. Amber Durum ..	0.4	0.2	306	0.2	4,831	3.7
Totals	100.0	100.0	125,225	100.0	131,591	100.0
Gross bushels (approx.) ..			242,952,000		251,311,000	

(1) Less than .05 per cent.

WEEKLY VISIBLE SUPPLY OF CANADIAN WHEAT



CUMULATIVE RECORD OF WHEAT MARKETINGS IN THE PRAIRIE PROVINCES BY WEEKS



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

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

Month	1965-66	1966-67	1967-68	1968-69
bushels				
August	10,458	118,973	133,651	—
September	10,500	83,333	182,051	23,084
October	4,500	89,384	152,009	57,458
November	10,205	163,332	50,475	101,966
December	7,500	106,833	143,833	44,136
January	46,108	145,889	160,214	131,034
February	26,712	120,334	143,884	99,776
March	98,598	177,393	274,690	153,067
April	71,701	133,699	123,167	—
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, March 1969

Grade	Prince Edward Island	Nova Scotia	New Brunswick	Quebec	Ontario
bushels					
5 Wheat	—	1,333	—	—	—
6 Wheat	3,500	14,000	27,000	—	—
Tough	—	—	—	—	916
Rejected	—	—	—	4,000	291
Durum	—	—	—	55,000	7,500
Others	—	—	—	37,900	1,627
Totals	3,500	15,333	27,000	96,900	10,334

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

Port	Wheat(1)	Durum wheat(1)	Oats(1)	Barley	Rye	Flaxseed	Rapeseed
thousand bushels							
<u>Pacific Seaboard</u>							
Van.-New West.	93,166	291	198	5,172	1,525	4,660	9,781
Victoria	5,300	—	—	—	—	—	—
Prince Rupert	2,662	—	—	—	—	—	—
<u>Churchill</u>	21,613	—	—	—	—	—	—
<u>Lakehead direct</u>	2,297	688	378	1,048	1,190	1,657	91
<u>Prescott direct</u>	336	—	—	—	—	—	—
<u>St. Lawrence</u>							
Montreal	9,787	6,700	336	—	100	214	—
Sorel	3,604	—	—	—	—	—	—
Trois-Rivières	1,697	259	—	—	—	6	—
Quebec	4,715	429	—	—	—	160	—
Baie Comeau	9,169	282	—	—	—	820	—
Port Cartier	11,302	2,776	—	—	—	—	—
<u>Maritime</u>							
Saint John	474	—	—	—	—	—	—
West Saint John	10,135	446	53	—	—	891	—
Halifax	8,700	—	—	—	—	—	—
Totals	184,957	11,871	965	6,220	2,815	8,408	9,872
August 1, 1967 — April 24, 1968	168,772	7,796	1,237	26,708	2,928	8,775	8,772

(1) Excluding seed.

Shipments Under Feed
Grain Assistance Regulations

Claims filed for payment up to February 28, 1969 represent the movement of 3,931 thousand bushels of wheat from the Prairie Provinces to Eastern Canada and British Columbia under the Feed Grain Assistance Regulations during the first half of the 1968-69 crop year. During the same months last year claims had been filed for a total of 6,289 thousand bushels, indicating on the assumption of approximately the same rate of submission of claims during both the current and preceding crop years, that the August-January 1968-69 shipments of wheat under the policy were running about 37 per cent below those of 1967-68. Revised data on the August-January 1967-68 shipments of wheat based on claims submitted up to February 28, 1969 place the six-month total at 6,760 thousand bushels. The bulk of the shipments during the current six months under review went to destinations in Quebec followed by smaller shipments to British Columbia and Ontario.

Provincial Distribution of Wheat Shipments under the Feed Grain Assistance Regulations
August-January 1968-69 and 1967-68

Month	Nfld.	P.E.I.	N.S.	N.B.	Que.	Ont.	B.C.	Total	Eastern wheat to Quebec
thousand bushels									
August 1968	4	20	111	32	327	70	71	635	34
September	3	8	40	13	279	92	145	581	39
October	4	5	65	14	366	105	248	807	23
November	4	12	61	15	351	100	182	725	33
December	5	5	40	8	345	105	78	587	16
January 1969	3	7	37	12	378	99	58	596	7
Totals(1)	24	57	355	95	2,045	572	783	3,931	153
<u>Same period 1967-68</u>									
Preliminary(2)	130	92	664	150	3,009	1,106	1,138	6,289	3
Revised(1)	134	94	702	164	3,117	1,215	1,334	6,760	5

(1) Based on claims filed up to February 28, 1969.

(2) Based on claims filed up to February 29, 1968.

Preliminary data on millfeed shipments under the Feed Grain Assistance Regulations indicate shipments of 238,599 tons during the first six months of the current crop year. During the same months of 1967-68 claims had been filed for a total of 227,098 tons, indicating on the assumption of approximately the same rate of submission of claims during both periods, that this year's shipments of millfeeds under the policy were running about 5 per cent above those of 1967-68. Revised data on the August 1967 - January 1968, shipments of millfeeds based on claims submitted up to February 28, 1969 place the six-month total at 270,482 tons. The greater portion of the millfeed shipments during the period under review went to destinations in Quebec and Ontario.

Provincial Distribution of Millfeed Shipments under the Feed Grain Assistance Regulations
August-January 1968-69 and 1967-68

Province	1967-68		1968-69
	Preliminary(2)	Revised(1)	(Preliminary(1))
tons			
Newfoundland	2,776	3,549	4,555
Prince Edward Island	4,105	4,798	4,378
Nova Scotia	14,465	17,770	19,011
New Brunswick	12,577	15,273	14,807
Quebec	117,156	132,445	118,733
Ontario	63,264	79,364	66,199
British Columbia	12,755	17,283	10,916
Totals	227,098	270,482	238,599

(1) Based on claims filed up to February 28, 1969.

(2) Based on claims filed up to February 29, 1968.

Monthly Exports of Canadian Wheat and Wheat Flour

Year and month	Wheat in bulk(1)	Seed wheat(2)	Total wheat	Wheat flour(2,3)	Total Wheat and wheat flour(3)
thousand bushels					
<u>1966-67</u>					
August	64,233	132	64,365	2,753	67,118
September	47,357	103	47,460	2,122	49,582
October	51,659	39	51,698	3,551	55,250
November	48,942	53	48,995	2,471	51,466
December	33,477	47	33,523	3,889	37,412
January	27,719	48	27,767	3,004	30,771
February	20,102	52	20,154	1,616	21,771
March	21,718	128	21,845	3,663	25,508
April	27,847	81	27,928	2,475	30,403
May	57,134	11	57,145	2,502	59,647
June	47,517	6	47,522	2,812	50,334
July	35,033	18	35,051	993	36,044
Totals	482,737	719	483,456	31,851	515,307
<u>1967-68</u>					
August	24,424	52	24,477	2,773	27,249
September	20,211	60	20,272	2,037	22,309
October	19,851	67	19,917	1,581	21,498
November	21,967	99	22,066	1,811	23,877
December	12,920	56	12,976	2,355	15,332
January	19,259	56	19,315	1,737	21,052
February	18,903	62	18,965	2,394	21,359
March	21,388	169	21,557	2,621	24,178
April	26,661	5	26,666	2,036	28,702
May	42,311	7	42,317	2,061	44,378
June	40,798	1	40,799	1,349	42,148
July	41,975	18	41,993	1,937	43,930
Totals	310,669	651	311,320	24,690	336,010
<u>1968-69(4)</u>					
August	31,127	1	31,128	2,270	33,398
September	30,019	45	30,064	2,437	32,500
October	25,995	(5)	25,996	2,079	28,074
November	23,338	68	23,406	2,053	25,459
December	16,061	50	16,112	1,934	18,045
January	18,843	9	18,853	1,574 ^r	20,427 ^r
February	24,149	31	24,181	2,007 ^r	26,188 ^r
March	19,857	134	19,990	2,544	22,534
Totals	189,390	339	189,729	16,897	206,626

- (1) Export clearances including shipments to the United States compiled by the Statistics Division, Board of Grain Commissioners for Canada.
- (2) Compiled from Canadian Customs returns, 1966-67 and 1967-68 adjusted to remove effect of time lag in reporting.
- (3) In terms of wheat equivalent. Wheat flour conversion rate: 2.3 bushels per cwt.
- (4) Preliminary, subject to revision.
- (5) Less than 500 bushels.
- ^r Revised figures.

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

Destination	Wheat (except durum)	Durum wheat	All wheat	
			March 1969	March 1968 ^r
bushels				
<u>Western Europe</u>				
EEC:				
Belgium and Luxembourg	218,870	—	218,870	317,333
France	19,843	—	19,843	10,453
Germany, Federal Republic	629,963	118,273	748,236	78,400
Netherlands	1,265,715	—	1,265,715	3,733
Sub-totals	2,134,391	118,273	2,252,664	409,919
<u>Other Western Europe</u>				
Britain	4,932,925	—	4,932,925	3,137,409
Ireland	149,333	—	149,333	149,333
Switzerland	500,473	—	500,473	—
Sub-totals	5,582,731	—	5,582,731	3,286,742
Totals	7,717,122	118,273	7,835,395	3,696,661
<u>Eastern Europe</u>				
U.S.S.R. (Russia)	—	—	—	2,865,267
<u>Africa</u>				
Ghana	322,583	—	322,583	47,040
Nigeria	—	—	—	183,867
Tanzania	36,745	—	36,745	37,335
Tunisia	—	—	—	461,626
Totals	359,328	—	359,328	729,868
<u>Asia</u>				
Afghanistan	1,010	—	1,010	—
China, Communist	4,400,191	—	4,400,191	11,275,860
Hong Kong	103,227	—	103,227	67,760
India	4,842,813	—	4,842,813	—
Japan	2,061,092	55,115	2,116,207	2,004,133
Malaysia	39,200	—	39,200	38,267
Saudi Arabia	—	—	—	24,558
Singapore	—	—	—	43,680
Taiwan	—	—	—	21,568
Totals	11,447,533	55,115	11,502,648	13,475,826
<u>Western Hemisphere</u>				
Barbados	30	—	30	—
Cuba	—	—	—	409,920
Ecuador	158,005	—	158,005	142,800
Jamaica	1,195	—	1,195	498
Venezuela	—	—	—	67,387
Totals	159,230	—	159,230	620,605
Sub-totals, all countries ...	19,683,213	173,388	19,856,601	21,388,227
Seed wheat(2)			133,631	168,797
Totals, all countries	19,683,213	173,388	19,990,232	21,557,024

(1) Overseas clearances as reported by the Statistics Division, Board of Grain Commissioners for Canada, for all countries except the United States. Excluding seed wheat.

(2) Compiled from Canadian Customs returns, 1968 adjusted for time lag, 1969 preliminary.

^r Revised figures.

Cumulative Exports of Canadian Wheat(1) by Destination

Destination	August 1968 - March 1969			Total same period last year ^r
	Wheat (except durum)	Durum wheat	Total wheat	
bushels				
<u>Western Europe</u>				
EEC:				
Belgium and Luxembourg	5,070,929	71,934	5,142,863	6,785,700
France	787,691	430,505	1,218,196	462,285
Germany, Federal Republic ..	5,181,377	3,205,785	8,387,162	12,213,707
Italy	5,438,631	3,528,780	8,967,411	5,485,455
Netherlands	4,796,195 ^r	423,600	5,219,795 ^r	4,179,506
Sub-totals	21,274,823 ^r	7,660,604	28,935,427 ^r	29,126,653
<u>Other Western Europe</u>				
Austria	—	393,643	393,643	404,200
Britain	42,611,090 ^r	253,860	42,864,950 ^r	43,379,404
Denmark	22,027	—	22,027	22,400
Finland	638,500	—	638,500	651,840
Ireland	638,400	—	638,400	1,008,772
Malta and Gozo	297,504	—	297,504	263,200
Norway	588,000	—	588,000	1,194,667
Sweden	59,957	—	59,957	—
Switzerland	2,119,818	2,345,854	4,465,672	1,371,169
Sub-totals	46,975,296 ^r	2,993,357	49,968,653 ^r	48,295,652
Totals	68,250,119	10,653,961	78,904,080	77,422,305
<u>Eastern Europe</u>				
Hungary	2,939,633	—	2,939,633	—
Poland	3,267,960	146,981	3,414,941	2,500,944
U.S.S.R. (Russia)	1,734,881	—	1,734,881	22,222,062
Totals	7,942,474	146,981	8,089,455	24,723,006
<u>Africa</u>				
Algeria	1,796,005	—	1,796,005	818,577
Congo	36,500	—	36,500	—
Ghana	827,272	—	827,272	136,640
Mauritania	771	—	771	—
Niger	687,344	—	687,344	—
Nigeria	—	—	—	582,400
Republic of South Africa	—	—	—	901,600
Sierra Leone	141,866	—	141,866	—
Sudan	—	—	—	36,195
Tanzania	110,235	—	110,235	261,345
Tunisia	—	692,139	692,139	461,626
Totals	3,599,993	692,139	4,292,132	3,198,383

See footnotes at end of table.

Cumulative Exports of Canadian Wheat(1) by Destination

Destination	August 1968 - March 1969			Total same period last year ^r
	Wheat (except durum)	Durum wheat	Total wheat	
bushels				
<u>Asia</u>				
Afghanistan	1,010	—	1,010	—
China, Communist	46,082,878	—	46,082,878	19,830,718
Hong Kong	652,961	—	652,961	638,400
India	14,390,423	—	14,390,423	128,592
Indonesia	29,394	—	29,394	—
Iraq	12,860	—	12,860	—
Japan	25,578,488	290,456	25,868,944	24,007,544
Jordan	—	—	—	12,860
Lebanon	—	—	—	8,613
Malaysia	194,880	—	194,880	294,747
Pakistan	2,753,926	—	2,753,926	875,609
Philippines	—	—	—	927,733
Saudi Arabia	—	—	—	146,249
Singapore	77,467	—	77,467	160,160
Syria	2,020,883	—	2,020,883	32,848
Taiwan	520,837	—	520,837	410,569
Turkey	32,518	—	32,518	—
Totals	92,348,525	290,456	92,638,981	47,474,642
<u>Western Hemisphere</u>				
Bahamas	40	—	40	—
Barbados	70	—	70	40
Cuba	1,712,200	—	1,712,200	3,702,750
Ecuador	412,150	—	412,150	293,456
El Salvador	—	—	—	167,488
Guatemala	16,667	—	16,667	3,685
Jamaica	741,806	—	741,806	7,528
Paraguay	1,727	—	1,727	—
St. Lucia	187	—	187	373
Trinidad and Tobago	220,133	—	220,133	—
Venezuela	2,358,952	1,823	2,360,775	1,926,344
United States	—	—	—	4,357
Totals	5,463,932	1,823	5,465,755	6,106,021
Sub-totals, all countries	177,605,043	11,785,360	189,390,403	158,924,357
Seed wheat(3)			338,532	621,005
Totals, all countries .	177,605,043	11,785,360	189,728,935	159,545,362

- (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, 1967-68 adjusted for time lag.

^r Revised figures.

Customs Exports of Canadian Wheat Flour by Countries of Consignment

Destination	December 1968(1)	March 1969(2)	August - March	
			1968-69(2)	1967-68(1)
bushels				
Western Europe				
EEC:				
Belgium and Luxembourg	10,612	9,223	59,105	76,199
Italy	—	2,070	10,350	12,765
Netherlands	338	398	3,094	14,775
Sub-totals	10,950	11,691	72,549	103,739
Other Western Europe				
Britain	157,566	277,343	1,819,479	2,123,388
Denmark	—	—	460	460
Gibraltar	2,576	—	5,152	12,236
Greece	15,213	—	49,459	45,765
Iceland	—	—	3,386	3,390
Ireland	—	—	5,538	5,957
Norway	—	—	115	115
Portugal	2,300	2,810	25,555	65,630
Spain	—	—	—	1,967
Sweden	—	—	515	515
Switzerland	—	—	—	92
Sub-totals	177,655	280,153	1,909,659	2,259,515
Totals	188,605	291,844	1,982,208	2,363,254
Africa				
Algeria	—	—	65,870	138,941
Angola	—	9,200	14,030	14,835
Cameroun Republic	1,150	—	21,402	19,053
Congo-Kinshasa	—	—	41,400	67,684
Dahomey	2,953	4,200	19,626	42,757
French Africa n.e.s.	—	—	8,285	—
Gambia	242	4,842	33,661	63,384
Ghana	129,837	122,962	1,125,146	1,068,562
Guinea Republic	12,119	—	88,893	—
Ivory Coast	—	—	3,795	7,144
Liberia	8,496	5,242	104,167	113,231
Libya	—	—	—	225
Malawi	1,829	5,370	33,258	50,165
Morocco	—	—	—	53,243
Mozambique	1,601	4,913	40,662	28,175
Nigeria	—	—	230	—
Portuguese Africa n.e.s.	1,150	2,898	43,339	33,890
Republic of South Africa	—	—	—	6,751
Senegal	—	—	—	460
Sierra Leone	1,412	1,322	8,413	8,190
Tanzania	—	—	5,750	5,750
Togo	17,965	7,475	100,128	103,583
Tunisia	—	—	— ^r	2,222
U.A.R. - Egypt	160,045	—	752,199	—
Zambia	—	—	—	6,900
Totals	338,799	168,424	2,510,254 ^r	1,835,145
Asia				
Aden	—	—	—	6,440
Afghanistan	—	—	621	517
Bahrain	—	—	—	218
Ceylon	8,924	—	839,015	859,628
Cyprus	—	—	467	—
Hong Kong	22,910	43,235	251,415	272,185
India	—	—	453	79,732
Indonesia	—	—	361,857	—
Iran	—	2,074	3,896	322

See footnotes at end of table.

FARMERS' MARKETINGS OF WHEAT, PRAIRIE PROVINCES

(SPECIFIED PERIODS)

MILLION BUSHELS

MILLION BUSHELS

800 —

800 —

700 —

700 —

600 —

600 —

500 —

500 —

400 —

400 —

300 —

300 —

200 —

200 —

100 —

100 —

0

0

PEAK MARKETINGS
1966-67 CROP YEAR
632.4 MILLION BUSHELS

JULY

JUNE

MAY

APR

MAR

FEB

JAN

DEC

NOV

OCT

SEPT

30 year average
1937-38
1966-67

10 year average
1957-58
1966-67

1963-64

1964-65

1965-66

1966-67

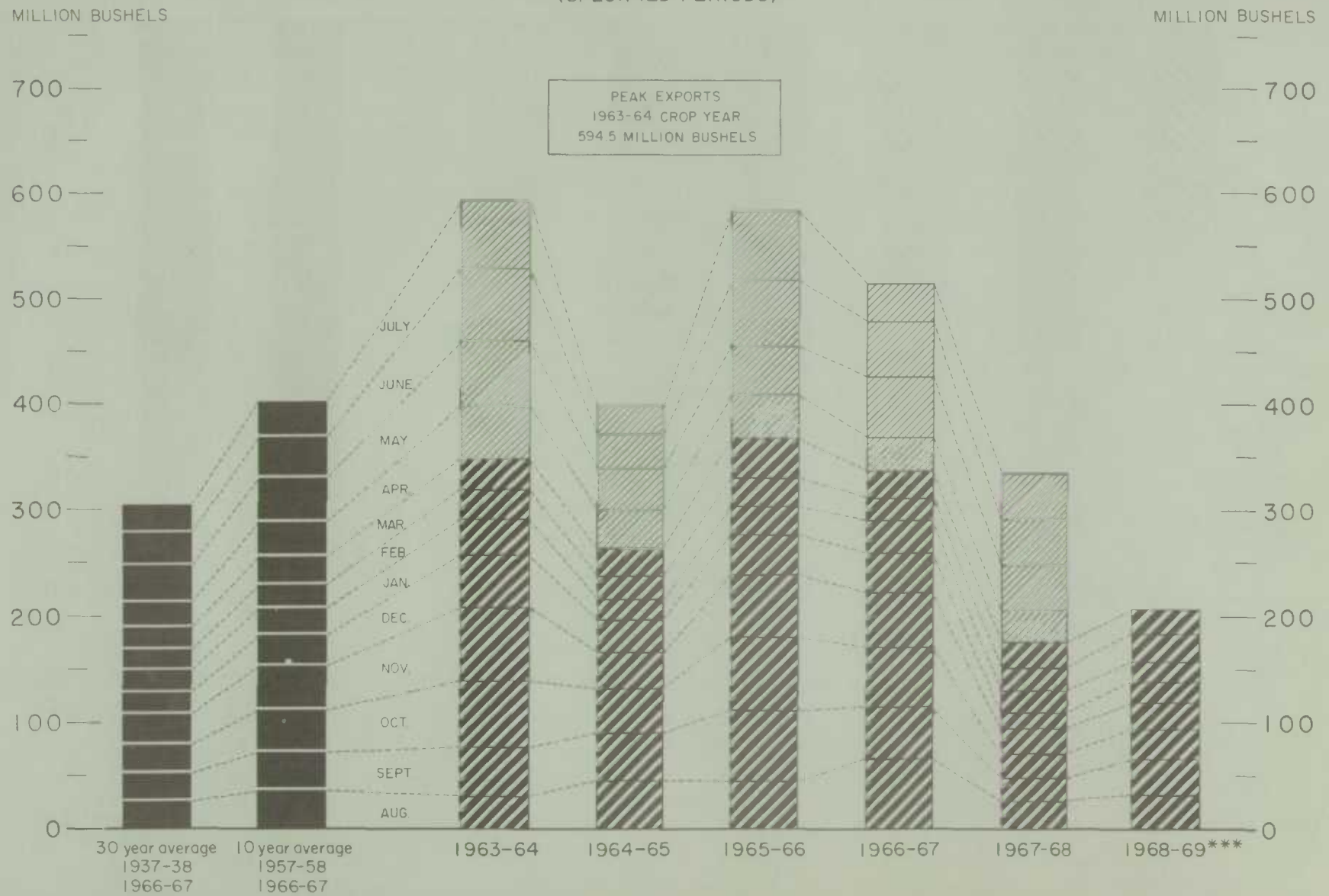
1967-68

1968-69

Agriculture Division D.B.S.

EXPORTS OF CANADIAN WHEAT* AND WHEAT FLOUR**

(SPECIFIED PERIODS)



* Beginning with 1955-56 includes seed wheat.

** In terms of wheat equivalent.

*** Preliminary.

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 —

50 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.

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DEC.

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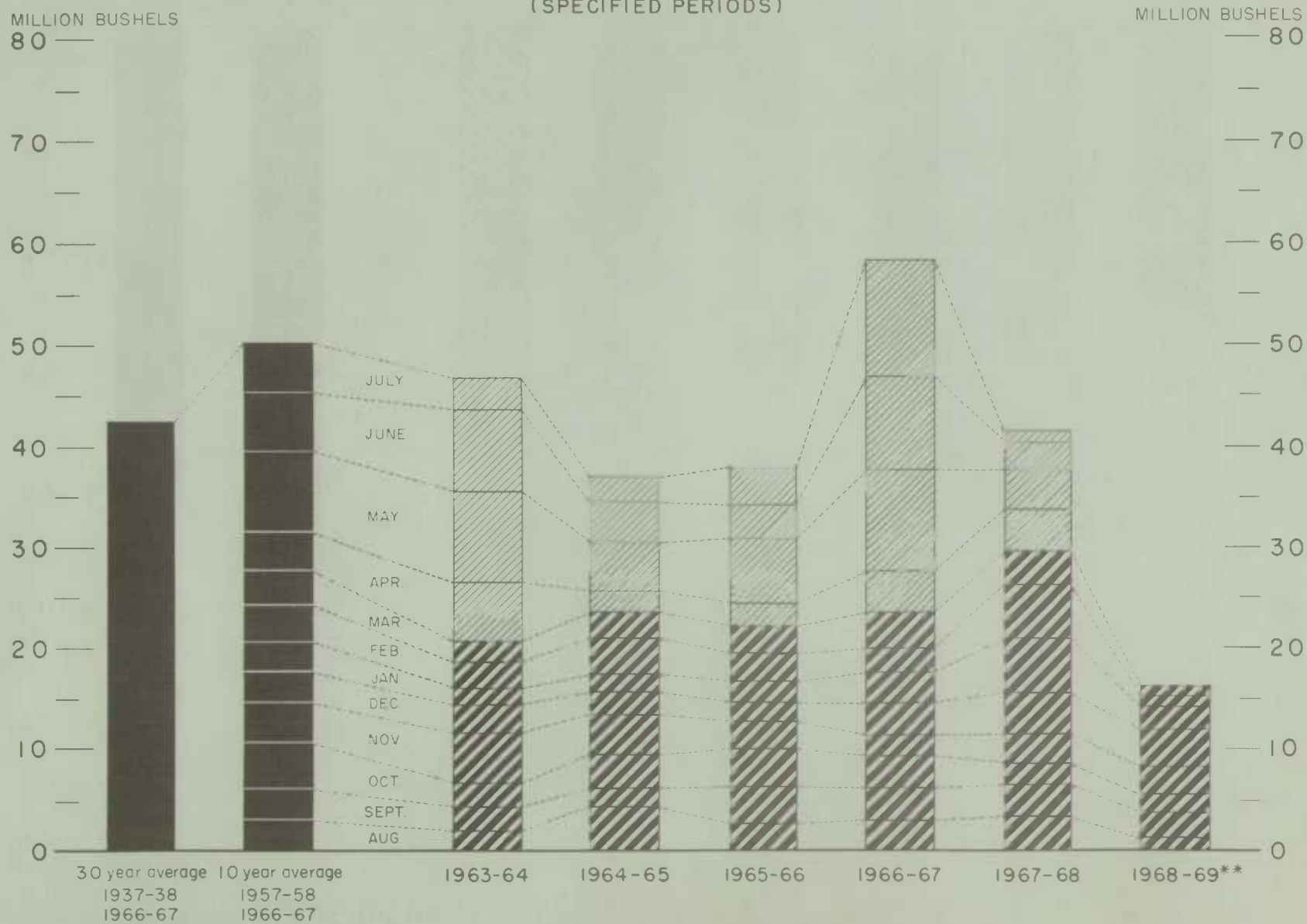
OCT.

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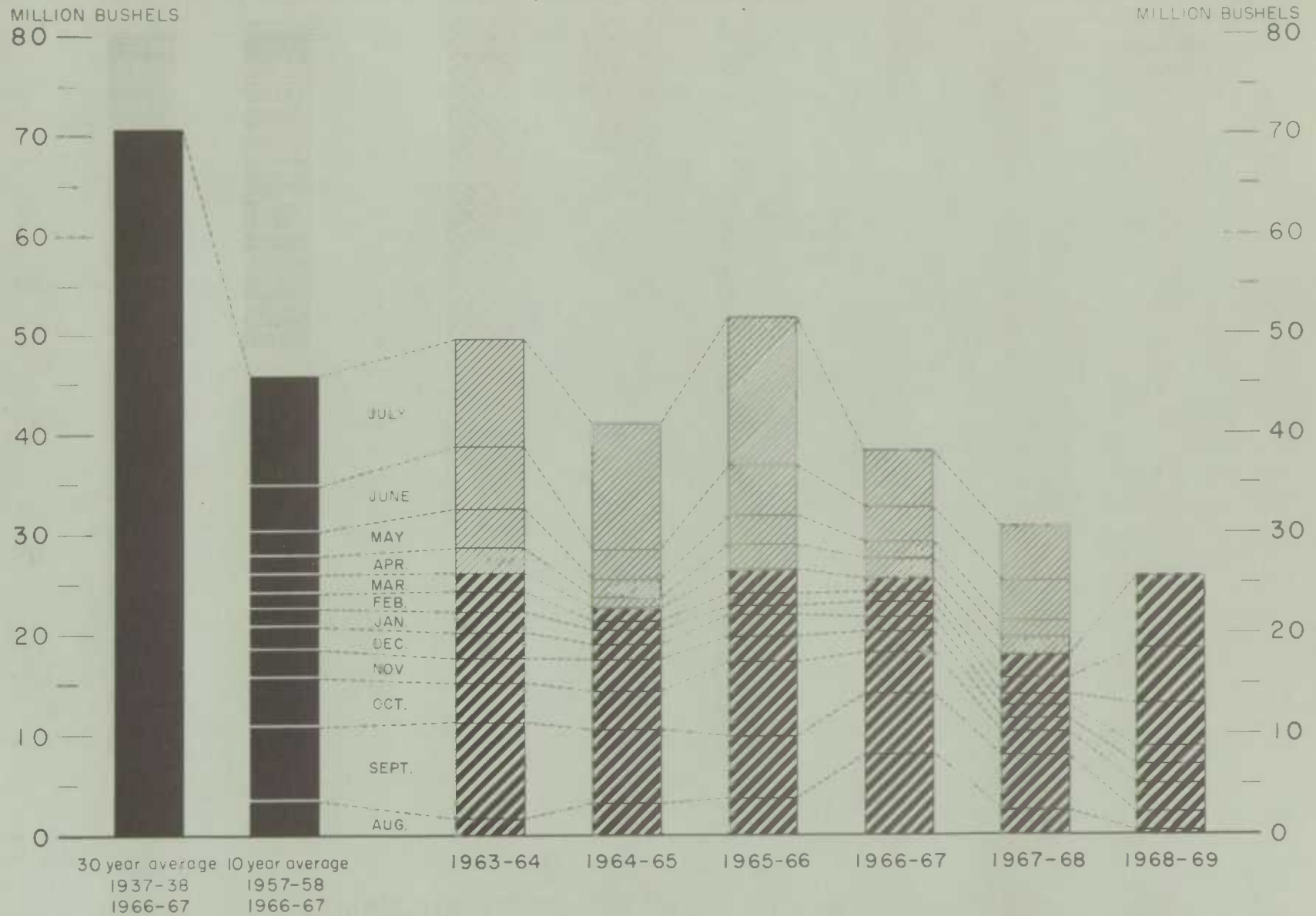
AUG.

EXPORTS OF CANADIAN BARLEY AND BARLEY PRODUCTS*

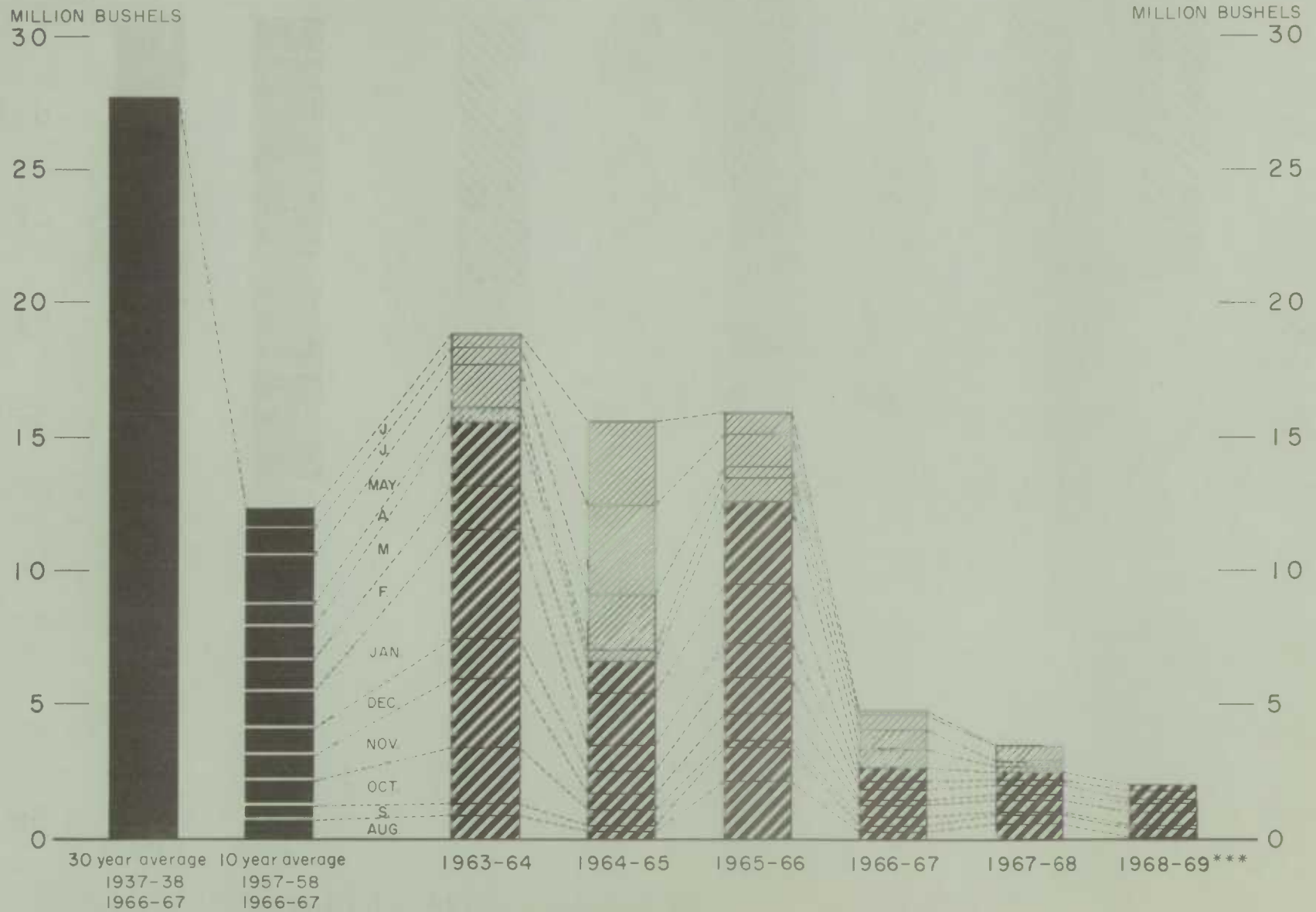
(SPECIFIED PERIODS)



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

MILLION BUSHELS

1,000 —

—

900 —

—

800 —

—

700 —

—

600 —

—

500 —

—

400 —

—

300 —

—

200 —

—

100 —

—

0

30 year average

1937-38

1966-67

10 year average

1957-58

1966-67

JULY

JUNE

MAY

APR

MAR

FEB

JAN

DEC

NOV

OCT

SEPT

AUG

1963-64

1964-65

1965-66

1966-67

1967-68

1968-69

MILLION BUSHELS

1,000 —

—

900 —

—

800 —

—

700 —

—

600 —

—

500 —

—

400 —

—

300 —

—

200 —

—

100 —

—

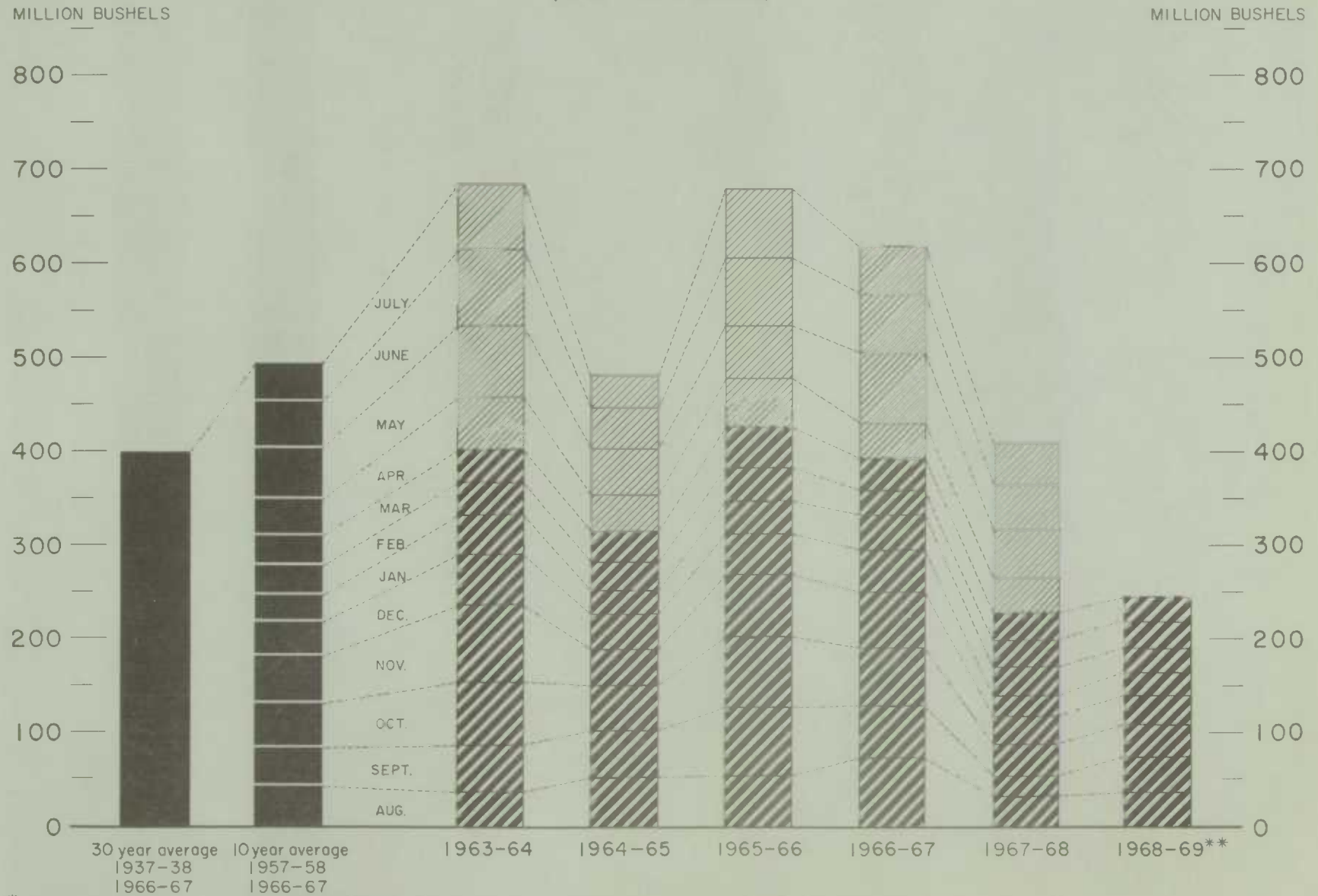
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* Wheat, oats, barley, rye, flaxseed and from 1960-61 rapeseed

Agriculture Division D B S

EXPORTS OF CANADA'S SIX MAJOR GRAINS AND PRODUCTS*

(SPECIFIED PERIODS)



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

Customs Exports of Canadian Wheat Flour by Countries of Consignment

Destination	December 1968(1)	March 1969(2)	August - March	
			1968-69(2)	1967-68(1)
bushels				
<u>Asia — Concluded</u>				
Iraq	—	13,054	46,522	—
Israel	—	—	228,390	543,837
Japan	—	345	6,750	4,298
Jordan	—	122	122	5,072
Korea, South	—	—	7,815	19,470
Lebanon	—	10,682	199,224	195,040
Philippines	—	—	1,012	354
Portuguese Asia	1,012	3,082	13,835	7,337
Qatar	—	402	798	655
Saudi Arabia	—	11,040	11,040	150,521
Syria	—	—	54,977	—
Thailand	11,673	91,411	196,942	158,829
Trucial States	—	—	1,886	138
Totals	44,519	175,447	2,227,037	2,304,593
<u>Oceania</u>				
British Oceania n.e.s.	2,466	460	6,495	1,725
Fiji	782	—	4,071	4,448
New Zealand	—	—	460	173
United States Oceania	3,450	3,450	20,709	34,730
Totals	6,698	3,910	31,735	41,076
<u>Western Hemisphere</u>				
Bahamas	15,739	28,421	200,427	207,500
Barbados	16,468	37,311	189,332	137,216
Bermuda	9,791	12,455	76,809	71,785
Bolivia	18,257	18,257	18,257	18,462
Brazil	—	—	—	110
British Honduras	—	6,399	27,400	41,204
Chile	—	—	—	205
Colombia	—	—	—	10,147
Costa Rica	—	—	—	2,350
Cuba(3)	833,789	1,543,321	7,970,022	7,772,006
Dominican Republic	—	414	2,162	803
Ecuador	—	—	345	—
El Salvador	—	—	487	313
French Guiana	—	—	—	920
French West Indies	—	1,613	3,455	5,715
Guatemala	—	690	7,130	2,875
Guyana	11,597	8,360	56,115	55,600
Haiti Republic	16,181	—	117,397	1,403
Honduras Republic	4,025	637	14,285	22,020
Jamaica	4,007	16,997	109,823	1,059,079
Leeward and Windward Islands	76,622	70,957	556,726	551,237
Netherlands Antilles	22,961	24,845	101,297	97,610
Panama	—	398	1,884	37,683
Paraguay	—	—	4,766	—
Peru	—	—	10,064	19,858
Puerto Rico	—	—	—	96
St. Pierre and Miquelon	57	978	12,284	16,169
Surinam	2,325	—	7,010	5,769
Trinidad and Tobago	26,981	112,850	368,934	305,383
Venezuela	—	—	483	230
United States Virgin Islands	—	127	253	—
United States	24,994	19,237	288,500	320,116
Totals	1,083,794	1,904,267	10,145,647	10,763,864
Totals, all countries	1,662,415	2,543,892	16,896,881 ^r	17,307,932

(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.
n.e.s. - Not elsewhere specified. ^r Revised figures.

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

Class and grade	Week ending				
	April 4	April 11	April 18	April 25	May 2
cents and eighths per bushel					
<u>Initial payment to producers</u>					
1 Northern	170	170	170	170	170
2 Northern	166	166	166	166	166
3 Northern	162	162	162	162	162
4 Northern	155	155	155	155	155
5 Wheat	141	141	141	141	141
6 Wheat	137	137	137	137	137
Feed Wheat	133	133	133	133	133
1 C.W. Garnet	155	155	155	155	155
2 C.W. Garnet	150	150	150	150	150
3 C.W. Garnet	145	145	145	145	145
1 Alberta Red Winter	154	154	154	154	154
2 Alberta Winter	149	149	149	149	149
3 Alberta Winter	143	143	143	143	143
1 C.W. Amber Durum	170	170	170	170	170
2 C.W. Amber Durum	166	166	166	166	166
3 C.W. Amber Durum	162	162	162	162	162
<u>International Grains Arrangement</u>					
<u>and domestic sales</u>					
1 Northern	189/2	190/2	190	189/7	190
2 Northern	184/6	184/6	184/4	184/3	184/4
3 Northern	180/3	180/3	180/1	180	180/1
4 Northern	175/2	175/2	175	174/7	175
5 Wheat	169/2	169/2	169	168/7	169
6 Wheat	162/2	162/2	162	161/7	162
Feed Wheat	158/2	158/2	158	157/7	158
1 C.W. Garnet	175/2	175/2	175	174/7	175
2 C.W. Garnet	174/2	174/2	174	173/7	174
3 C.W. Garnet	173/2	173/2	173	172/7	173
1 Alberta Red Winter	175/2	175/2	175	174/7	175
2 Alberta Winter	174/2	174/2	174	173/7	174
3 Alberta Winter	173/2	173/2	173	172/7	173
1 C.W. Amber Durum	220/6	220/6	220/4	220/3	220/4
2 C.W. Amber Durum	218/6	218/6	218/4	218/3	218/4
3 C.W. Amber Durum	207/7	207/7	207/5	207/4	207/5
<u>(Basis in store Vancouver)</u>					
1 Northern	198	198	197/6	197/5	197/6
2 Northern	193/3	193/3	193/1	193	193/1
3 Northern	191/1	191/1	190/7	190/6	190/7
4 Northern	186/5	186/5	186/3	186/2	186/3
5 Wheat	184/5	184/5	184/3	184/2	184/3
6 Wheat	178/5	178/5	178/3	178/2	178/3
Feed Wheat	174/5	174/5	174/3	174/2	174/3
1 C.W. Garnet	186/5	186/5	186/3	186/2	186/3
2 C.W. Garnet	185/5	185/5	185/3	185/2	185/3
3 C.W. Garnet	184/5	184/5	184/3	184/2	184/2
1 Alberta Red Winter	186/5	186/5	186/3	186/2	186/3
2 Alberta Winter	185/5	185/5	185/3	185/2	185/3
3 Alberta Winter	184/5	184/5	184/3	184/2	184/3

CANADIAN FLOUR MILLING SITUATION

Production Wheat flour production by Canadian mills during March 1969 amounted to 3,037,000 hundredweight, relatively unchanged from the February 1969 output of 3,045,000 hundredweight, but 9 per cent less than the March 1968 total of 3,329,000 hundredweight and 15 per cent lower than the ten-year (1959-68) average production for the month of March of 3,568,000 hundredweight. Mills reporting operations during March 1969 had a total rated capacity of 167,000 hundredweight per 24-hour day and on the basis of a 26-day working period 69.7 per cent of this rated capacity was effective.

Wheat milled for flour during March 1969 amounted to 6,854,000 bushels compared with the 6,912,000 bushels milled in February 1969, and 8 per cent below the 6,461,000 bushels milled in March a year ago. Of the wheat milled for flour some 5,622,000 bushels were Western Canadian spring wheat (other than Durum) while the remainder consisted of Ontario winter wheat (662,000 bushels); Durum (490,000 bushels); and all other (79,000 bushels).

Exports According to preliminary Customs returns, exports of Canadian wheat flour during March 1969 amounted to the equivalent of 2,544,000 bushels (some 1,106,000 hundredweight of flour) 27 per cent greater than the 2,007,000 bushels exported in February 1969 but 3 per cent less than the adjusted March 1968 exports of 2,621,000 bushels. Flour shipments during the month went to forty-five countries with exports to Cuba amounting to 1,543,000 bushels and accounted for 61 per cent of the March total. Other leading markets for Canadian wheat flour in terms of wheat during the month with shipments in thousands of bushels were as follows: Britain, 277; Ghana, 123; Trinidad and Tobago, 113; Thailand, 91; Leeward and Windward Islands, 71; and Hong Kong, 43.

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

Crop year	Wheat milled for flour bushels	Wheat flour	
		Production	Exports(1)
		cwt.	
1935-36-1939-40 average	67,845,114	29,405,451	9,603,941
1940-41-1944-45 "	99,704,638	43,908,245	23,699,546
1945-46-1949-50 "	107,330,372	47,011,540	25,819,721
1950-51-1954-55 "	100,446,328	43,847,894	21,812,041
1955-56-1959-60 "	99,148,211	39,752,589	16,349,156
1960-61-1964-65 "	91,128,177	40,834,088	15,769,803
1965-66	97,925,995	43,531,263	16,576,117
1966-67	90,084,646	39,978,571	13,848,208
1967-68	84,769,150	37,755,841	10,734,857
1968-69(2)			
August	7,337,239	3,240,492	986,867
September	6,998,651	3,098,523	1,059,361
October	8,172,604	3,620,231	903,816
November	7,184,220	3,178,288	892,595
December	6,486,592	2,869,465	840,653
January	7,849,053	3,488,490	684,355
February	6,912,380	3,044,913	872,783 ^r
March	6,853,974	3,036,678	1,106,040
Totals	57,794,713	25,577,080	7,346,470
Same months 1967-68 ^r	57,460,370	25,617,960	7,525,188

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

(2) Subject to revision.

^r Revised figures.

UNITED STATES SITUATION

Total Wheat Supplies
Above Last Year

Total domestic supplies of wheat in the United States are placed at 2,107.6 million bushels compared with 1,947.4 million in 1967-68. With increases occurring in both carryover stocks and production, the July 1, 1968, carryover of 537.2 million was more than one quarter larger than the 1967 stocks of 425.0 million while the 1968 crop of some 1,570.4 million bushels was 3 per cent greater than the 1967 harvest of 1,522.4 million. Domestic use may reach 750.0 million bushels as against 650.1 million in 1967-68 with increased use of wheat for feeding purposes reflected in the increase. After deducting anticipated domestic requirements for the current United States crop year, some 1,358.1 million remain available for export and for carryover, an increase of 5 per cent over the 1,297.9 million in 1967-68.

Exports Sharply Below
Previous Year

Exports of wheat and wheat flour in terms of grain equivalent during the period July 1968 - March 1969, amounted to 368.4 million bushels, 38 per cent less than the 592.5 million exported during the same months last year. The balance remaining on April 1, 1969, for export and for carryover was estimated at 989.8 million bushels compared with 705.5 million on the same date a year ago.

United States Wheat Supplies

Item	1967-68 ^r	1968-69 ^p
	million bushels	
Carryover at beginning of crop year (July 1)	425.0	537.2
Production	1,522.4	1,570.4
Total estimated domestic supplies	1,947.4	2,107.6
Imports of wheat and wheat flour in terms of wheat for domestic use, July - March	0.7	0.5
Total estimated supplies(1)	1,948.1	2,108.1
Less estimated domestic requirements for crop year(2)	650.1	750.0
Available for export and for carryover	1,297.9	1,358.1
<u>Deduct</u>		
Exports of wheat as grain, July - March	556.7	329.6
Exports of wheat flour in terms of wheat, July - March (3)	35.7	38.8
Total exports of wheat and wheat flour(4)	592.5	368.4
Balance on April 1 for export and for carryover	705.5	989.8

(1) Excludes imports for April - 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.

^p Preliminary figures.

^r Revised figures.

Stocks of Wheat
in all Positions
April 1, 1969

On April 24, 1969 the United States Department of Agriculture reported that all wheat in storage on April 1 totalled 1,112 million bushels, 32 per cent more than a year earlier and 59 per cent above 2 years ago. Off-farm stocks at 650 million were 36 per cent above a year earlier, and farm holdings were up 28 per cent. Disappearance from all positions from October 1968 through March 1969, is indicated at 566 million bushels, compared with 720 million for the comparable period a year earlier. Of the total April 1 wheat stocks 103 million bushels were owned by Commodity Credit Corporation and CCC loans were outstanding on an additional 553 million bushels.

Durum wheat stocks in all positions on April 1 totalled 67.5 million bushels, 46 per cent above April 1, 1968, and 49 per cent above 2 years ago. Farm holdings of 49.9 million bushels were 52 per cent above a year earlier, and off-farm stocks at 17.6 million were up 32 per cent. Disappearance from October 1968 through March 1969 was 40.1 million bushels compared with 31.5 million in the comparable period a year earlier.

United States Wheat Stocks, April 1, 1969 with Comparisons

Grain and position	April 1 1967	April 1 1968	Oct. 1 1968	April 1 1969
thousand bushels				
<u>All Wheat</u>				
On Farms (1)	238,769	362,427	731,767	462,299
Commodity Credit Corp. (2)	1,539	751	756	759
Mills, Elev. & Whses. (1) (3)	459,831	476,339	945,789	648,812
Totals	700,139	839,517	1,678,312	1,111,870
<u>Durum Wheat (4)</u>				
On Farms (1)	28,617	32,891	89,198	49,869
Commodity Credit Corp. (2)	281	170	169	138
Mills, Elev. & Whses. (1) (3)	16,365	13,216	18,282	17,502
Totals	45,263	46,277	107,649	67,509

(1) Estimates of the Crop Reporting Board.

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

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

(4) Included in all wheat.

1969-Crop Wheat County
and Terminal Price-Support
Rates Announced

A report released on April 22, 1969 by the United States Department of Agriculture stated in part that basic rates for terminal and county price-support loans on 1969-crop wheat were announced by the U.S. Department of Agriculture. The terminal rates range from \$1.45 to \$1.70 per bushel.

The rates announced today reflect the previously-announced national average farm loan rate of \$1.25 per bushel, which is the same as for the 1968 crop.

Several changes in the price relationships among terminals are being made from 1968 crop rates. These changes are based on a review of terminal cash market prices, prices received by farmers, trends in production and utilization and freight rate patterns and changes. In addition, all terminal rates reflect a uniform 1 cent adjustment to offset the one cent increase in the new Uniform Grain Storage Agreement loading-out charge.

Final Report on 1969
Wheat Program Signup
Issued by USDA

A release from the United States Department of Agriculture on April 23 reported that final signup returns for the 1969 wheat program issued by the U.S. Department of Agriculture show 981,153 farms signed up having 45,722,428 acres in allotments, or 88.7 per cent of the total national allotment. Voluntary added diversion of wheat allotment cropland totals 4,961,486 acres.

This report covers a complete tally of all county results for the signup which began Feb. 3 and ended March 21, except in 11 inclement-weather States where it was extended through April 4.

The 1969 wheat program has a record number of farms — 139,019 more than were enrolled last year, and a record percentage of national allotment acreage on signed farms — 88.7 per cent as compared to 85.4 per cent in 1968.

Under the voluntary 1969 wheat program, farmers can request the establishment of oats/rye base acreages upon which they can substitute wheat in place of feed grain production. This final signup report has a total of 364,298 acres in such requested bases.

Wheat farmers also can request up to 50 per cent overseeding of their allotment, with storage, under bond, of the production from their excess acres. This makes it possible for some farmers in high crop risk areas to spread the stored excess production over ensuing years of possible underproduction. In this final report, such requests were received from farms having allotments totalling 698,218 acres.

Flour Production

According to the Bureau of the Census, United States Department of Commerce, wheat flour production in the United States in March 1969 amounted to 20,885,000 hundredweight, averaging 995,000 hundredweight per working day. This compared with an average output per working day of 949,000 hundredweight last month and 1,041,000 hundredweight in March 1968. Wheat flour mills during March operated at 99.2 per cent of capacity, compared with 75.2 per cent and 74.4 per cent, respectively, for the previous month and the same month a year ago.

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	
April 1, 1969	140 1/4 - 162 1/2		April 1, 1969	154 5/8 - 209 5/8	
2	136 1/2 - 166	(1)	2	154 3/4 - 209 3/4	
3	155 1/4 - 159 1/4		3	154 3/8 - 209 3/8	
4	Good Friday		4	Good Friday	
7	142 1/2 - 144 1/2		7	153 7/8 - 208 7/8	
8	148 1/4 - 161 1/2		8	153 5/8 - 206 5/8	
9	159 3/4		9	153 7/8 - 204 7/8	
10	149 3/4		10	154 3/8 - 205 3/8	
11	136 1/2 - 156 1/2		11	154 3/8 - 205 3/8	
14	151 3/4		14	155 7/8 - 206 7/8	
15	145 1/2 - 141 3/4		15	156 3/8 - 207 3/8	
16	150 1/4 - 152 1/2		16	156 3/8 - 207 3/8	
17	145 1/2		17	156 1/2 - 207 1/2	
18	149 1/2		18	156 1/4 - 207 1/4	
21	145		21	156 - 207	
22	167 3/4 - 172 3/4		22	155 1/8 - 206 1/8	
23	141 1/4		23	154 5/8 - 205 5/8	
24	143 - 155		24	154 3/8 - 205 3/8	
25	150 1/2 - 166 1/2		25	155 - 206	
28	142 - 157 1/2		28	155 5/8 - 206 5/8	
29	151 - 161		29	154 1/2 - 206 1/2	
30	149 1/4		30	154 3/4 - 206 3/4	

(1) Nominal.

Chicago Wheat Futures, High Points of Closing

Date	May	July	September	December	March
	cents and eighths per bushel				
April 1, 1969	127	127	130	135/4	139/7
2	127/6	127/6	130/4	136	140/4
3	127/2	127/3	130	135/5	140/2
4			Good Friday		
7	126/4	126/4	129/2	135	139/5
8	127/4	127/1	129/7	135/5	139/5
9	127/1	126/5	129/3	135	139/3
10	127/4	126/7	129/3	135/1	139/3
11	128/2	127/7	130/4	136/1	140
14	128/4	129/1	131/7	137/3	141/5
15	130/4	130/1	132/7	138/6	142/5
16	130/1	129/7	132/5	138/2	142/3
17	129/4	129/3	132	137/4	141/5
18	129/4	129/3	131/7	139/6	141/6
21	130/1	129/7	132/4	138	142/1
22	130	129/5	132/1	137/7	142
23	129/5	129/1	131/7	137/4	141/6
24	129/4	128/7	131/4	137/1	141/1
25	131/7	131/5	134/4	139/7	143/2
28	132/4	132/2	134/6	140/1	144/2
29	129/3	130/1	133	138/4	142/3
30	129/2	130/2	133	138/5	142/3

AUSTRALIAN SITUATION

Wheat Supplies at Record Level

Reflecting the effect of a sharp increase in production, which more than offset a substantial decrease in carryover stocks, total supplies of wheat in Australia for the 1968-69 crop year are estimated at an all-time high of 587.2 million bushels compared with 357.8 million in 1967-68. The current harvest, presently estimated at 535.4 million bushels, almost doubled the 277.4 million harvested in 1967-68, while carryover stocks, at December 1, 1968, at 51.8 million bushels, declined by a wide margin from the 80.4 million at December 1, 1967. After deducting some 85.0 million bushels for anticipated domestic requirements, an estimated 502.2 million are available for export and for carryover during 1968-69, sharply above the 257.3 million in 1967-68.

Exports Lower Than Previous Year

Combined exports of wheat as grain and wheat flour in terms of grain equivalent during the period December 1 - March 22 of the current Australian crop year amounted to 64.2 million bushels, 9 per cent lower than the 70.2 million exported during the corresponding four months of the 1967-68 crop year. The balance remaining on March 23, 1969 for export and for carryover, at 438.0 million bushels, was in sharp contrast to the comparable 1968 total of 187.1 million.

Australian Wheat Supplies

Item	1967-68 ^r	1968-69 ^p
	million bushels	
Carryover, including flour as wheat, at beginning of crop year (December 1)	80.4	51.8
Production	277.4	535.4 ^r
Total estimated domestic supplies	357.8	587.2
Less estimated domestic requirements for crop year .	100.5	85.0 ^r
Available for export and for carryover	257.3	502.2
<u>Deduct</u>		
Exports of wheat as grain, December 1 - March 22 .	65.3	61.4
Exports of wheat flour in terms of wheat, December 1 - March 22	4.9	2.8
Total exports of wheat and wheat flour	70.2	64.2
Balance on March 23 for export and for carryover ...	187.1	438.0

^p Preliminary figures.
^r Revised figures,

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 April 15, 1969 and is reproduced with the permission of the Trade Commissioner Service, Department of Trade and Commerce

Production 1968-69 crop. — The following are the latest delivery and production estimates of the 1968-69 crop, by State, according to an unpublished report issued by the Australian Wheat Board and provided to us by officials in the Bureau of Agricultural Economics:

Estimates 1968-69 Crop

<u>State</u>	<u>Deliveries</u> thousand bushels	<u>Production</u> million bushels
New South Wales (N.S.W.)	193,404	209
Victoria	93,224	90
South Australia (S.A.)	68,409	83
Western Australia (W.A.)	105,661	112
Queensland	38,971	41
Tasmania	174	n/a
Totals	499,843	535

These figures are down about 8 million bushels on our March report estimate, most of this being accounted by a downward revision in New South Wales production and deliveries.

We can now estimate with some confidence that total deliveries of prime hard wheat from the 1968-69 season will be between 63 and 65 million bushels. This is based on the official estimate of 30 million bushels for N.S.W. deliveries made in March by the N.S.W. Grain Elevators Board, and the very recent information supplied to us by the Melbourne office, for Queensland prime hard deliveries of 33,690,000 bushels. The Queensland figure is considerably above our previous estimate of 20 million bushels which, in the absence of official information, was based on average historical basis of prime hard deliveries accounting for 50 per cent of total deliveries in Queensland since 1960-61.

The record deliveries of prime and prime hard wheat is no doubt the outstanding characteristic of the 1968-69 Australian wheat crop. Estimated deliveries of 65 million bushels of these wheats including a small amount of Western Australian prime hard and Victorian hard wheat in 1968-69 compares with 37.7 million bushels in the previous season, 39.7 million bushels in 1966-67 and 20.5 million bushels in 1965-66.

The record acreage sown to wheat and the total output in 1968-69 have received considerable attention in the national and agricultural press and in statements by government and Wheat Board spokesmen. It is interesting to note that the amazingly high level of premium wheat deliveries this year has not been mentioned, to our knowledge, in official statements or press reports, particularly since this is such an important factor in determining the competitiveness of Australian wheat and in the ability of the Australian Wheat Board to dispose of the record 1968-69 crop.

Prospects for the 1969-70 crop. — With sowing expected to begin in earnest in about four weeks (mid May) there is little likelihood that the proposed scheme of production quotas by the Australian Wheatgrowers Federation (A.W.F.) will be put into effect in time to have any direct impact on next crop's wheat acreage. However, there has been no lack of speculation by various wheat experts as how much acreage the 60,000 Australian wheatgrowers will put into wheat in the coming season. Opinion is considerably divided. Supporters of the A.W.F. production restriction proposals

are predicting another sizeable increase in acreage if the plan is not implemented very soon. The more conservative opponents of production restrictions at this time are suggesting, on the other hand, that the individual wheatgrower will make an obvious conclusion from the bleak market outlook and, added to the 'psychological effect' of impending quotas, will refrain from increasing his wheat acreage.

Each side supports its prediction by citing various reports from wheatgrower districts. The majority opinion would appear to favour another lift in acreage from 1 million to 2 million acres.

We suggested in our last report that an 'atmosphere of restraint' and improved export prospects for wool, the major substitute income earner to wheat in the extensive wheat-sheep zone, would have a definite impact on the wheat acreage for the next crop. However, since displaying solidarity at the A.W.F. Perth meeting last month, the wheat industry has shown itself to be seriously divided on the question of production controls and State rivalries have intensified over the question of State quotas. This development is not conducive to encouraging individual restraint by the confused wheatgrower.

In any case, the more significant question for Canada is the amount of Australian premium wheat which will enter the world market from the 1969-70 crop. In view of the results of this year's crop and the excellent pre-sowing rains which have built up the necessary level of sub-soil moisture across the premium wheat areas, the 1969-70 premium wheat crop could be considerably above the average of the last few years, perhaps approaching a level of 100 million bushels, on the basis of the trend in recent years.

No decision on wheat delivery quotas. — No firm decision was reached on the question of quota restrictions of wheat deliveries for the next harvest at the special meeting of the Australian Agricultural Council (A.A.C.) in Sydney on April 10, 1969.

On March 27, 1969, the chairman of the Australian Wheat Board, Dr. A.R. Callaghan, in a public address praised industry leaders for courage in facing the urgent problems confronting the Australian wheat industry, and described the A.W.F. quota plan as a 'significantly responsible attempt to adjust production needs to marketing prospects'. He also suggested that the scheme if adopted would serve to meet a long-standing criticism levelled at Australia by other experts, notably in the United States, where acreage control is enforced.

In the several weeks between the A.W.F. Perth meeting in March and the A.A.C. meeting in Sydney, wheat industry leaders held urgent discussions with State and Federal Government Ministers on the question of implementing the proposed production controls. Two weeks before the A.A.C. meeting, the Minister for Primary Industry, Mr Anthony outlined in a Parliamentary statement the position of the Commonwealth Government towards the scheme:

'I would like to know the reaction of all wheatgrower organizations throughout Australia, and to know if the State governments would give legislative backing to the quota delivery proposals. The Commonwealth can then consider the financial implications.'

At the conclusion of the A.A.C. meeting Mr. Anthony, who is also chairman of the A.A.C., stated that 'certain fiscal and legal difficulties would have to be

resolved before the scheme can be implemented'.

The key stumbling block to the implementation of the A.W.F. plan is the attitude of the N.S.W. Graziers' Association.

The urgency with which most wheatgrower organizations are seeking the implementation of controls stems largely from the fear that unless quotas are imposed for 1969-70, growers will face a sharp cut in the normal A.\$1.10 (\$1.32 Canadian) a bushel advance payment. Mr. Anthony has made it very clear that this is likely unless production is restricted to about the level of the A.W.F. plan (350 million bushels). However, members of the N.S.W. Graziers' Association, mostly large grazier-wheatgrowers who face the most drastic cut from the previous few years under the A.W.F. quota scheme, would suffer comparatively less from a reduced first advance particularly if the delay in implementing the scheme enabled them to take off at least one more big crop. Thus the graziers and therefore the N.S.W. Government have so far been unwilling to commit their support to the A.W.F. plan. Mr. Anthony, in turn, is not likely to make any financial commitment on the first advance until he has unanimous support for the A.W.F. plan from all States.

The N.S.W. Graziers' Association has stated that it will submit a firm proposition about wheat production controls after the Association's annual conference which commenced April 14, 1969. (Under the terms of the scheme proposed at Perth, grower organizations must communicate their attitude to the scheme by May 30, well beyond the time when growers will have commenced sowing for the 1969-70 crop.)

Our opinion would be that the Association will offer a counter proposal and demand a larger quota for N.S.W. and that this would lead to a period of bargaining and negotiations between the graziers and the rest of the wheat industry.

Before the plan can be implemented one important administrative aspect will have to be resolved: what to do with wheat above the quota. The A.W.F. plan is particularly hazy on this question in suggesting that such wheat should be accepted by silos only after all quota wheat has been received, and storage space becomes available.

Australia has at present silo capacity for 517 million bushels. Assuming a year-end carryover of 200 million bushels, wheat storage installations could only accept a maximum of about 300 million bushels. Obviously the Australian wheatgrowers could not store anything like 200 million bushels on farms (assuming 1969-70 deliveries at about same level as in the previous season) under present conditions without an unacceptable deterioration of wheat quality, principally from insect infestation. The A.W.F. knows that the Australian Wheat Board would not permit this to happen. Some of our contacts in Canberra have even suggested that until the Commonwealth Government extends some form of financial assistance to growers to enable them to construct proper farm storage on a massive scale, the A.W.F. plan cannot practically be implemented.

In view of serious conflict of interest within the industry, and some important practical problems with the A.W.F. plan in its present form, it appears unlikely Australia will have a quota restriction scheme implemented in time to affect the coming harvest.

New high yielding wheat announced. — The principal of Roseworthy Agricultural College, Mr. R.I. Herriot, announced that in tests in all districts, a new wheat

variety from the college had consistently outyielded South Australia's leading variety, Heron, by about 10 per cent. It was extremely adaptable and was expected to be approved for release in the coming season, under the suggested name of 'Halberd'. In an experiment on 15 acres at the college last year, 800 bushels were produced at an average of 54.5 bushels per acre.

According to the B.A.E. (Statistical Bulletin: 'The Wheat Industry' 1967-68 and 1968-69, Preliminary) 25.6 per cent of the wheat acreage in N.S.W. and 29.8 per cent in South Australia was sown to 'Heron' in the 1967-68 season.

Marketing. — The B.A.E. in its March 1969 Bulletin 'Trends in Australian Rural Production and Exports' notes a distinct downturn in the value of exports of Australian wheat for the 1968-69 financial year (ending June 30) estimated at A.\$289 million (\$348 million Canadian). This compares with A.\$366.3 million (\$441 million) in 1967-68 and A.\$348 million (\$419 million) in 1966-67.

The volume of exports for the same period is estimated at 205 million bushels. Significantly, this is a reduction of 15 million bushels from the previous B.A.E. estimate before the sizeable Chinese sale was made.

The value of wheat production for the same period, however, is given as A.\$756 million (\$910 million Canadian), an increase of A. \$410 million (\$494 million) over 1967-68, reflecting the recovery from the drought to a record crop at a somewhat lower export guarantee price but higher home consumption price. At the same time, other crops such as oats, barley, sugar, and rice show a recovery from the drought and in addition considerable price improvements on the international market.

End-of-year stocks. — In its March 1969 'The Wheat Situation', the B.A.E. has stated that overseas sales were not likely to increase sufficiently to avoid a carry-over at the end of the 1968-69 season (November 30, 1969) of up to twice the previous record of 95 million bushels at the end of the 1954-55 season. On March 14, Mr. Anthony while addressing the N.S.W. Graziers' Association in Sydney confirmed that on the basis of present estimates, he expects there will be 250 million bushels of wheat in storage at the end of this season.

Gift of wheat to Afghanistan. — The Australian Government will make a gift of 10,000 metric tons (367,000 bushels) of wheat to Afghanistan, the Minister for External Affairs, Mr. Gordon Freeth, announced on March 27. The gift, valued at A.\$525,400 (\$633,000 Canadian), would prevent a drain on Afghanistan's foreign exchange reserves and form part of Australia's commitment under the International Grains Arrangement to supply developing countries with 225,000 metric tons of wheat or flour as food aid in 1968-69.

The Minister said that Afghanistan was the eighth country to receive Australian assistance under the International Grains Arrangement - Food Aid Convention. Other countries to which wheat or flour has been given are India, Pakistan, Ceylon, Nigeria, Indonesia, Korea and Fiji.

Exports of Australian Wheat and Wheat Flour in Terms of Wheat
December 1 — March 22, 1968-69 and Corresponding Period 1967-68

Destination	Wheat		Wheat flour	
	1967-68	1968-69	1967-68	1968-69
thousand bushels				
<u>Western Europe</u>				
EEC:				
Belgium	126	—	—	—
Germany, Federal Republic	72	675	—	—
Netherlands and I/T	1,134	3,954	—	—
Sub-totals	1,332	4,629	—	—
<u>Other Western Europe</u>				
Britain	8,439	9,723	137	117
Ireland	690	143	—	—
Malta	392	392	—	—
Norway	994	1,415	—	—
Switzerland	—	84	—	—
Sub-totals	10,515	11,757	137	117
Totals	11,847	16,386	137	117
<u>Africa</u>				
Malawi	—	—	121	112
Mauritius	—	—	132	183
Rhodesia	1,240	1,045	—	—
Sudan	423	—	—	—
Zambia	907	777	104	—
Others	(1)	4	50	159
Totals	2,570	1,826	407	454
<u>Asia</u>				
Aden	327	210	—	—
Aden and Aden I/T	—	—	80	57
Aden and Aden I/T Atta	—	—	78	29
Arabian Gulf	—	—	7	62
Arabian Gulf Atta	—	—	203	326
Ceylon	4	440	1,535	4
China	22,287	5,414	—	—
Hong Kong	1,290	811	23	9
India	7,556	919	—	—
Indonesia	—	—	1,223	213
Iraq	1,807	—	—	—
Japan	5,819	21,665	—	—

Exports of Australian Wheat and Wheat Flour in Terms of Wheat
December 1 — March 22, 1968-69 and Corresponding Period 1967-68

Destination	Wheat		Wheat flour	
	1967-68	1968-69	1967-68	1968-69
thousand bushels				
<u>Asia (concluded)</u>				
Korea South	—	369	—	—
Kuwait	507	1,027	—	—
Lebanon	862	1,117	—	—
Pakistan	—	865	—	—
Philippines	246	160	38	40
Saudi Arabia	—	303	—	76
Taiwan	—	756	—	—
Thailand	508	475	76	65
Malaysia	3,520	1,901	—	—
Sabah	—	—	5	11
Sarawak	—	—	12	8
Singapore	3,656	762	1	1
Others	68	271	41	58
Totals	48,457	37,465	3,322	959
<u>Oceania</u>				
New Zealand	917	—	—	—
<u>Western Hemisphere</u>				
Chile	—	2,062	—	—
Colombia	—	1,294	—	—
Peru	1,486	2,345	—	—
West Indies Area	—	—	154	86
Totals	1,486	5,701	154	86
<u>Pacific Area and Sundries</u>				
Pacific Islands	23	20	835	1,123
Ships' Stores and Sundries	—	—	44	61
Totals	23	20	879	1,184
Totals, all countries	65,300	61,400	4,900	2,800

(1) Less than 500 bushels.

ARGENTINE SITUATION

1968-69 Wheat Supplies Below Previous Year Estimated total supplies of wheat in Argentina for the 1968-69 (December-November) crop year amount to 261.2 million bushels, consisting of the December 1, 1968 carryover of 44.4 million bushels and the crop placed at 216.8 million. Indicated supplies for the current Argentine crop year, reflecting a substantial decline in production which more than offset a sharp increase in carryover stocks, are about 8 per cent less than the 1967-68 total of 285.3 million bushels. After making an allowance of 150.6 million bushels for anticipated domestic requirements, an estimated 110.5 million are available for export and for carryover as against 127.5 million in 1967-68.

Exports Sharply Above Last Year Preliminary exports of wheat and wheat flour in terms of wheat equivalent during December 1968 - March 1969 amounted to 46.8 million bushels, considerably above the 24.4 million exported during the same months in 1967-68. The balance remaining on April 1, 1969 for export and for carryover was estimated at 62.9 million bushels, substantially below the April 1, 1968 total of 103.0 million.

Argentine Wheat Supplies

Item	1967-68 ^r	1968-69 ^P
	million bushels	
Carryover at beginning of crop year (December 1) (1)	16.4	44.4
Production	269.0	216.8
Total estimated domestic supplies	285.3	261.2
Less estimated domestic requirements for crop year	157.8	150.6 ^r
Available for export and for carryover	127.5	110.5
<u>Deduct</u>		
Exports of wheat as grain, December - March	24.4	46.8
Exports of wheat flour in terms of wheat, December - March	0.1	0.9
Total exports of wheat and wheat flour	24.5	47.7
Balance on April 1 for export and for carryover	103.0	62.9

(1) Includes allowances for farm stocks.

^P Preliminary figures.

^r Revised figures.

The following account of the Argentine situation has been extracted from a report from Mr. S.E. Kidd, Assistant Commercial Secretary (Agriculture) Buenos Aires, under date of April 22, 1969 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.

Wheat. — On Friday, April 18, the Secretariat of Industry and Internal Commerce announced that a resolution would be issued this week by that Department, together with the Secretariat of Agriculture and Livestock and the Secretariat of External Commerce, authorizing the National Grain Board to import wheat in the quantity needed to meet the requirements of the millers in the current crop year. The wheat is to be sold to flour millers at 1,650 pesos per 100 kilos (\$1.38 per bushel) at the station closest to their establishments.

The object of the resolution is to maintain reasonable prices for flour and to encourage deliveries by farmers who are holding stocks in anticipation of higher prices.

It is expected that the first tender under the resolution will be issued very shortly for about 50,000 to 60,000 metric tons (1,837,000 to 2,205,000 bushels) of wheat. The total quantity of wheat to be imported throughout the year will depend on the reaction in the market to the first shipments.

Another indication of the Government's concern regarding the shortage of wheat is their recent resolution which authorizes the NGB to purchase seed wheat at various locations in the cereal zone in order to ensure that there will be adequate supplies for the sowing of the new crop. The purchase price will be 1,400 pesos per bag of 60 kilograms (\$1.95 per bushel), at the place of purchase in the country.

A Japanese team of cereal experts recently visited Argentina at the invitation of the Ministry of Foreign Affairs. The objective of the mission was to visit port facilities, study the systems and methods of marketing and of quality control and to inspect milling facilities. The wheat zones of southern Buenos Aires were visited. The main problem, as far as the Japanese were concerned, was the lack of facilities for the loading of vessels of more than 20,000 tons (735,000 bushels) at Argentine ports other than Bahia Blanca. Freights from the traditional suppliers to Japan average about U\$S 8 (\$8.62 Canadian) per ton, compared with freights from Argentina of U\$S 11.00 to U\$S 11.50 (\$11.85 to \$12.39) per ton.

The wheat supply situation is becoming very tight and new export sales are few and far between, although a parcel of Candeal was reported to have been sold to Italy during the first week of March, at U\$S 76.25 per ton (\$2.23 per bushel Canadian) f.o.b. Necochea. A cargo of bread wheat was also sold to the World Food Programme for April shipment, at U\$S 59.50 per metric ton (\$1.74 per bushel).

Hard wheat prices continued to strengthen during March, rising from 1,650 to 1,710 pesos per 100 kilos (\$1.38 to \$1.43 per bushel) f.o.r. Buenos Aires, and from 1,650 to 1,685 pesos (\$1.38 to \$1.41 per bushel) at Bahia Blanca.

Prices stabilized during April and at the 21st of the month were 1,700 and 1,675 pesos (\$1.42 and \$1.40 per bushel) at Buenos Aires and Bahia Blanca, respectively. The announcement of the Government's intention to import wheat has not yet had an effect on wheat prices.

Also at April 21, prices on the Buenos Aires Futures Exchange were 1,712 pesos per 100 kilograms (\$1.43 per bushel) for May delivery; 1,728 (\$1.44 per bushel) for June; 1,750 (\$1.46 per bushel) for July and 1,772 (\$1.48 per bushel) for August.

Candeal (Durum) prices during March rose from 2,270 to 2,350 pesos per 100 kilograms (\$1.90 to \$1.96 per bushel) f.o.r. Buenos Aires, and reached a high of 2,400 pesos (\$2.00 per bushel) for several days during the month. At Bahia Blanca, on the

other hand, prices fell steadily throughout the month, from 2,270 pesos to 2,180 pesos (\$1.90 to \$1.82 per bushel).

By April 21, Durum prices had settled to 2,300 pesos (\$1.92 per bushel) at Buenos Aires and 2,150 pesos (\$1.79 per bushel) at Bahia Blanca.

Argentine Wheat Exports December - February 1967-68 and 1968-69

Destination	February		December-February	
	1968	1969	1967-68	1968-69
thousand bushels				
<u>Western Europe</u>				
EEC:				
Belgium	176	20	176	788
France	432	—	1,148	647
Germany, Federal Republic	18	—	18	37
Italy	4,968	3,095	8,550	9,348
Netherlands	299	605	483	2,001
Sub-totals	5,893	3,720	10,375	12,821
<u>Other Western Europe</u>				
Britain	283	329	1,388	2,386
Norway	37	314	37	486
Portugal	376	—	376	—
Switzerland	7	110	7	228
Sub-totals	703	753	1,808	3,100
Totals	6,596	4,473	12,183	15,921
<u>Eastern Europe</u>				
Hungary	—	—	22	—
<u>Africa</u>				
Algeria	250	444	351	444
<u>Asia</u>				
Cyprus	—	—	—	472
India	—	—	—	4,364
Japan	—	518	—	518
Mozambique	—	—	—	426
Totals	—	518	—	5,780
<u>Western Hemisphere</u>				
Bolivia	82	—	198	—
Brazil	228	3,737	228	9,738
Chile	—	1,128	55	2,283
Colombia	37	—	535	—
Paraguay	38	290	863	917
Peru	1,104	437	3,249	3,197
Uruguay	344	—	344	—
Totals	1,833	5,592	5,472	16,135
Totals, all countries	8,678	11,026	18,029	38,279

GRAIN SITUATION IN BRITAIN

The following account of the current grain situation in Britain has been extracted from a report by Mr. G.D. Cooper, Commercial Assistant, London, under date of April 25, 1969, and is reproduced with the permission of the Trade Commissioner Service, Department of Trade and Commerce.

Weather and crops. — Weather conditions during April in general improved slightly, but temperatures have remained generally below average. The growth of autumn sown crops has been checked by the hard weather and there has been some damage by frost and waterlogging. Conditions for spring cultivations have shown some improvement and a fairly prolonged period of fine weather enabled arrears to be reduced. Work, however, still remains behind schedule, particularly on heavy soils and yields of some crops will undoubtedly be affected by the earlier unfavourable conditions. Growth of cereals has generally been retarded. Less wheat has been sown than usual in the leading arable area of the eastern region, but the barley acreage should show an increase.

Requirements and supplies. — The sixth statistical statement issued by the Home Grown Cereals Authority giving the position as at the end of February 1969, shows no changes in the estimates of requirements or of home production of grains. Estimated total imports of coarse grains have, however, been reduced by 50,000 long tons to 4 million long tons, only slightly above last year's total of 3.99 million long tons. Within the total of estimated coarse grain imports, an increased proportion is now expected to be barley with a consequential lower estimated annual import of maize. Coarse grain imports to the end of February at 2.545 million long tons are some 340,000 long tons lower than at the same time last year with forward purchases notified of all coarse grains at 800,000 long tons, similar to last year's level.

Imports of wheat to the end of February 1969 at 2.8 million long tons (104,533,000 bushels) were 120,000 long tons (4,480,000 bushels) higher than for the comparable period for the previous year and forward purchases notified at 1.46 million long tons (54,507,000 bushels) also showed an increase of 330,000 long tons (12,320,000 bushels) on last year's figure. Factors affecting these increased imports have been the reduced domestic production and the United States dock strike which encouraged imports of Continental feed wheat to help replace supplies of maize which were temporarily unobtainable.

Intake of wheat by flour millers continues at a lower level than last year, but intake of barley by maltsters and distillers was higher this February than last, and the cumulative figure is now only slightly lower than the previous years'. Compounders intake of grain continues at a higher level than last year. Details of intake of domestic grain by processors, to the end of February 1969 are as follows: —

	<u>1967-68</u>	<u>1968-69</u>	<u>Differential</u>
		thousand bushels	
Cumulative intake of wheat by Flour Millers ...	39,387	34,160	— 5,227
Cumulative intake of wheat by other Processors (mainly compounders)	32,107	33,973	+ 1,867
Cumulative intake of barley by maltsters/distillers	48,067	46,900	— 1,167
Cumulative intake of barley by Other Processors (mainly compounders)	83,300	88,200	+ 4,900

Stocks of grain on farms. — The Ministry of Agriculture has announced that stocks of grain on farms as at the end of February 1969 for Great Britain, are estimated at 4.17 million long tons, comprising wheat 1.32 million (49,280,000 bushels), barley 2.47 million (115,267,000 bushels) and oats 380,000 (25,035,000 bushels), with 1.44 million (53,760,000 bushels), 2.63 million (122,733,000 bushels) and 450,000 long tons (29,647,000 bushels), respectively, for the previous year.

Cereals deficiency payments. — The Ministry of Agriculture has announced that the advance deficiency payment on wheat for the fifth accounting period for the cereal year 1968-69 (i.e. for the month of January 1969) will be 3s 9d per long cwt (26.3 cents per bushel). An amount of 2.6d per long cwt (1.3 cents per bushel) will be deducted in respect of the levy payable to the Home Grown Cereals Authority.

Minimum import prices and levy arrangements. — A number of changes in the minimum import price and levy arrangements have been made recently. These include reductions in the current and prospective rates of general and country levies on wheat and the current and prospective rates of country levy on Continental barleys. The current and prospective rates of general levy and the current and prospective rates of country levies on Canadian and Sustralian barley remain unchanged.

Grain Markets. — Prices of both domestic and overseas grains have become firmer and demand has been good. Domestic hard milling wheat was quoted at 24s 0d to 25s 0d per long cwt (\$1.68 to \$1.75 per bushel) and semi-hard and soft grades at 23s 6d to 24s 6d per long cwt (\$1.64 to \$1.71 per bushel). Feed wheat for prompt delivery traded at up to 23s 9d per long cwt (\$1.66 per bushel).

In imported grains, there has been interest in Continental feed wheat and feed barley and imports of milling wheats have held generally steady. There has been some interest in offers of Australian oats.

The Home Grown Cereals Authority's ex-farm guide prices for millable wheat and feeding barley are quoted at 23 0 0d and 21 15 0d per long ton (\$1.60 and \$1.21 per bushel), respectively, for April-May delivery.

CALENDAR OF WHEAT EVENTS

- | | | |
|-------|----|--|
| April | 23 | A release from the United States Department of Agriculture re: Final sign-up returns for the 1969 wheat program issued by the U.S. Department of Agriculture show 981,153 farms signed up having 45,722,428 acres in allotments, or 88.7 per cent of the total national allotment. |
| | 25 | The United States Secretary of Agriculture, Clifford M. Hardin announced the signing of a \$57.2 million fifth supplement to the February 20, 1967 Public Law 480 Title I agreement with India providing for the sale of U.S. agricultural commodities. The signing took place in New Delhi. |
| May | 21 | According to a telegraphic crop report, published by the Dominion Bureau of Statistics, recent rainfall has delayed seeding throughout most areas of the Prairie Provinces. However, considerable progress had been made and it is expected that activity will soon be general again. The amount of the intended acreage seeded is very variable ranging from only a small proportion in some districts to up to almost 100 per cent in some southern places. Except for a few scattered areas, moisture supplies are very good. |

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