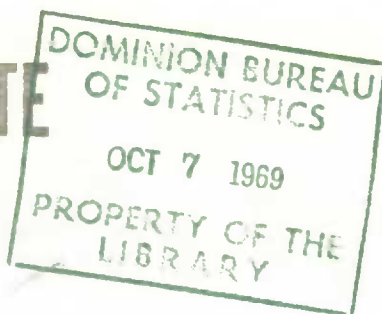


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The Wheat Review

AUGUST 1969



DOMINION BUREAU OF STATISTICS

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DOMINION BUREAU OF STATISTICS

Agriculture Division

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THE WHEAT REVIEW

AUGUST 1969

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WORLD WHEAT SITUATION

Crop Year Shipments Decline for Third Year

Total shipments of wheat and flour in terms of wheat, from United States, Canada, Argentina and Australia amounted to some 1,160.0 million bushels during the 1968-69 crop year (August-July) some 24 per cent less than the 1967-68 level of 1,409.8 million, and 15 per cent below the ten-year (1957-58 - 1966-67) average of 1,360.2 million. During the August - July period of 1968-69 each of the four major exporters, with the exception of Argentina shared in the decrease. Shipments from the four traditional major exporters during the 1968-69 crop year, with comparisons, appear in the accompanying table.

Exports of Wheat and Flour in Terms of Wheat, August-July 1968-69 with comparisons

August-July	United States	Canada	Argentina	Australia	Total
million bushels					
1950-51	375.3	241.0	94.5	127.8	838.6
1951-52	466.6	355.8	24.1	93.4	939.9
1952-53	322.6	385.5	38.9	107.0	854.0
1953-54	211.4	255.1	110.3	63.4	640.2
1954-55	280.4	251.9	134.5	94.3	761.1
1955-56	359.4	312.3	108.6	107.5	887.8
1956-57	539.5	264.4	100.6	120.2	1,024.7
1957-58	396.4	320.3	77.6	61.9	856.2
1958-59	455.6	294.5	106.2	82.7	939.0
1959-60	513.1	277.3	76.5	117.8	984.7
1960-61	677.5	353.2	62.9	198.0	1,291.6
1961-62	704.2	358.0	95.5	219.8	1,377.5
1962-63	650.6	331.4	60.7	186.2	1,228.9
1963-64	852.3	594.5	106.5	274.0	1,827.3
1964-65	736.9	399.6	174.3	245.1	1,555.9
1965-66	868.6	584.9	280.7	193.3	1,927.5
1966-67	732.7	515.3	101.2	264.0	1,613.2
1967-68 ^r	755.9	336.0	70.5	247.4	1,409.8
1968-69 ^p	543.0	305.8	98.8	212.4	1,160.0

^p Preliminary figures.

^r Revised figures.

Year-end Supplies Third Highest on Record

At the close of the Canadian crop year (July 31), total supplies of wheat remaining in the United States, Canada, Argentina and Australia, for export and for carryover at the end of their respective crop years, amounted to 2,667.5 million bushels, 24 per cent above the 2,145.4 million at the same time a year ago. With the exception of Argentina increases were registered in each of the four major exporters. Supplies on or about August 1, 1969, in millions of bushels, were held as follows, with last year's comparable figures in brackets: United States, 1,414.5 (1,300.9); Canada, 849.8 (665.5); Argentina, 45.6 (62.7); and Australia, 357.6 (116.3).

Estimates for both years include on-farm stocks as well as those in commercial positions. It is to be noted that the 1969 United States crop estimated at 1,459 million bushels is now included. The supply figures for Canada represent crop-year-end carryover only, as the new crop will not be taken into account until September 1 in these calculations. The new Australian and Argentine production for 1969-70 will be included at January 1.

CANADIAN SITUATION

Canadian Wheat Supplies
in 1969-70 Again at
Record Level

Assuming realization of the August forecast of production, Canadian wheat supplies for the 1969-70 crop year, at 1,527.9 million bushels, will be at an all-time high for the second consecutive year. Supplies of the size indicated are some

16 per cent greater than the previous season's record level of 1,315.4 million and reflect substantial increases in both carryover stocks and production. Stocks carried over from the 1968-69 crop year increased from 665.5 million bushels at July 31, 1968 to a record 849.8 million in 1969. The 1969 harvest, based on conditions as at mid-August, is forecast at 678.1 million bushels compared with 649.8 million in 1968. Although seeded acreage declined by some 15 per cent, the average yield increased from 22.1 bushels in 1968 to a next-to-record 27.2 bushels per acre this year.

Revised Total Supply and Disposition of Canadian Wheat 1963-64 - 1968-69
and Estimated Supply 1969-70
(Crop Years August 1 - July 31)

Item	1963-64	1964-65	1965-66	1966-67	1967-68	1968-69(1)	1969-70(1)
million bushels							
<u>Supplies</u>							
Carryover, at beginning of crop year	487.2	459.4	513.0	420.1	576.8	665.5	849.8
Production	723.5	600.7	649.4	827.3	592.9	649.8	678.1(2)
Totals(3)	1,210.7	1,060.2	1,162.4	1,247.5	1,169.7	1,315.4	1,527.9
<u>Disposition</u>							
Exports wheat and flour	594.5	399.6	584.9	515.3	336.0	305.8	
Human consumption .	59.1	57.7	60.9	59.0	60.5	59.9(4)	
Seed	42.1	40.1	42.0	40.4	39.4	35.0(4)	
Industrial use	1.5	1.7	1.9	2.3	2.4	2.4(4)	
Carryover, at end of crop year	459.4	513.0	420.1	576.8	665.5	849.8	
Residual item(5)	54.1	48.1	52.6	53.8	65.9	62.5	
Totals	1,210.7	1,060.2	1,162.4	1,247.5	1,169.7	1,315.4	

(1) Subject to further revision pending receipt of Board of Grain Commissioners' final data on commercial stocks at July 31, 1969.

(2) Based on conditions as at August 15 and subject to revision as later estimates become available.

(3) Includes small amounts of imports.

(4) Estimated.

(5) Includes feed for livestock and waste but also reflects the effect of any estimating errors in other components of the balance sheet.

Realization of the 1969 production forecast for wheat will be dependent upon how weather and other developments affect the crop between August 15 and completion of harvesting. The second official forecast of production, to be released on October 1 will give greater effect to actual harvesting conditions and outturns.

1968-69 Crop Year According to preliminary data, combined exports of wheat in bulk,
Exports Below seed wheat and wheat flour in terms of wheat equivalent in the
Previous Year crop year 1968-69 amounted to 305.8 million bushels, 9 per cent
less than the previous year's total of 336.0 million bushels and
24 per cent below the ten-year (1957-58 - 1966-67) average exports of 402.9 million
bushels.

Exports of wheat in bulk (as reported by the Board of Grain Commissioners for Canada) amounted to 280.5 million bushels, some 10 per cent less than the 310.7 million shipped in 1967-68 and was 23 per cent lower than the ten-year average of 362.9 million. Exports of seed wheat, based on preliminary Customs data amounted to 0.6 million bushels compared with the 1967-68 adjusted figure of 0.7 million. Wheat flour exports, based on preliminary data, were the equivalent of 24.6 million bushels, practically unchanged from the adjusted 24.7 million cleared during 1967-68 and 33 per cent less than the ten-year average of 36.6 million.

The 1968-69 total for exports of wheat in bulk was compiled from overseas clearances (and exports to the United States) as recorded by the Board of Grain Commissioners for Canada, while data on exports of wheat flour and seed wheat were obtained from Canadian Customs returns. Adjusted data on wheat flour exports for the 1968-69 crop year, removing the effect of time lag in reporting Customs returns, will be included in a subsequent issue of this publication.

Monthly exports of wheat in bulk, seed wheat and wheat flour in terms of wheat during the crop year recently completed ranged from a high of 33.4 million bushels in August 1968 to a low of 11.6 million in April 1969. Overseas clearances of bulk wheat, the major component of the total exports of wheat, seed wheat and flour, ranged between 31.1 million bushels in August and 10.3 million in April.

Exports of Canadian wheat during the crop year under review were the lowest since 1959-60. For the first time the People's Republic of China was the major market of Canadian wheat with purchases of 83.1 million bushels and accounted for 30 per cent of the 1968-69 crop year total. Britain moved to second place during 1968-69 with imports of 55.7 million and accounted for 20 per cent of the crop year total. Other principal markets during the 1968-69 crop year with quantities in millions of bushels, with the 1967-68 crop year figures in brackets were as follows: Japan, 43.3 (40.8); India, 15.3 (22.4); Italy, 15.2 (10.2); Federal Republic of Germany, 12.8 (17.5); Belgium and Luxembourg, 7.5 (9.9); the Netherlands, 5.9 (5.0); and Switzerland, 5.6 (2.6).

Exports of wheat flour in 1968-69 went to 85 countries with shipments to Cuba amounting to the equivalent of 12.5 million bushels and representing 51 per cent of the crop year total. Exports of Canadian wheat flour to Cuba in 1967-68 were the equivalent of 11.8 million bushels and accounted for 48 per cent of the total. Other leading markets for Canadian wheat flour in 1968-1969 were as follows, in millions of bushels of wheat equivalent, with revised 1967-68 data in brackets: Britain, 2.4 (2.9); Ghana, 1.3 (1.5); Ceylon, 0.9 (0.9); Leeward and Windward Islands, 0.8 (0.8); U.A.R. Egypt, 0.8 (0.04); Indonesia, 0.6 (nil); and Trinidad and Tobago, 0.6 (0.4).

Of the 0.6 million bushels of seed wheat exported during 1968-69, shipments to the United States, at 0.4 million and Saudi Arabia at 0.2 million accounted for 68 per cent and 32 per cent, respectively, of the crop year total.

August Forecast of
Production of Canada's
1969 Grain Crops

With the exception of winter wheat, production of each of the major Canadian grains will be above last year's levels on the basis of yields indicated at August 15. Realization of the 1969 yield and production forecasts in the accom-

panying table is dependent on the existence of satisfactory weather conditions throughout the remainder of the growing and harvesting season. Harvesting of above average cereal and oilseed crops in the Prairie Provinces is proceeding rapidly under near ideal weather conditions. A high proportion of all crops has been swathed and combining is now complete in some southern districts of Alberta and Saskatchewan. Samples from early threshed grain indicate some shrinkage due to high temperatures prior to harvest but good bushel weights are generally being obtained and quality is generally good. In many localities near record yields are being harvested or are in prospect, owing to timely rains and moderate temperatures during the head filling stage of plant development.

At August 15 the date on which this report is based, swathing was getting underway in the south and central districts of the Prairies and threshing of fall rye was well advanced. Although there had been a two week delay in the early development of this year's crop due to a cool spring, frosts and dry conditions during June, generous amounts of moisture in July and early August, followed by hot weather promoted optimum development and rapid maturity of all crops. Given continued good weather early completion of harvesting is anticipated.

August Forecast of the 1969 Production of Principal Grain Crops
Canada and Prairie Provinces, Compared with 1968

Province and crop	Area		Yield per acre		Production	
	1968	1969	1968 ^r	1969(1)	1968 ^r	1969(1)
	acres		bushels		bushels	
<u>Canada</u>						
Winter wheat	355,000	360,000	42.0	40.7	14,910,000	14,652,000
Spring wheat(2) ..	29,067,500	24,607,700	21.8	27.0	634,934,000	663,447,000
All wheat	29,422,500	24,967,700	22.1	27.2	649,844,000	678,099,000
Oats for grain ..	7,555,900 ^r	7,855,000	48.0	49.2	362,516,000	386,382,000
Barley	8,836,500	9,535,100	36.8	40.8	325,373,000	389,230,000
Fall rye	590,600	821,300	19.6	18.1	11,589,000	14,855,000
Spring rye	88,000	106,000	16.6	19.5	1,460,000	2,062,000
All rye	678,600	927,300	19.2	18.2	13,049,000	16,917,000
Flaxseed	1,524,400	2,440,700	12.9	13.4	19,666,000	32,796,000
Mixed grains	1,667,000	1,740,300	51.4	51.1	85,602,000	88,913,000
Rapeseed	1,052,000	2,012,000	18.4	18.7	19,400,000	37,600,000
<u>Prairie Provinces</u>						
Wheat(2)	28,860,000	24,400,000	21.8	27.0	629,000,000	658,000,000
Oats(3)	5,340,000 ^r	5,830,000	46.6	49.2	249,000,000	287,000,000
Barley	8,330,000	9,000,000	36.1	40.6	301,000,000	365,000,000
Rye	619,000	859,000	18.4	17.5	11,400,000	15,062,000
Flaxseed	1,502,000	2,420,000	12.8	13.4	19,300,000	32,500,000
Rapeseed	1,052,000	2,012,000	18.4	18.7	19,400,000	37,600,000

(1) As indicated on basis of conditions on or about August 15.

(2) Includes durum wheat.

(3) Estimated areas for harvest as oats.

^r Revised figures.

Wheat. — Canada's 1969 wheat crop, currently forecast at 678.1 million bushels is 4 per cent larger than last year's 649.8 million, and 21 per cent above the ten-year (1958-67) average of 560.4 million in spite of the decrease in acreage of 15 per cent, from the 1968 seeded area. Average yields increased from 22.1 bushels in 1968 to a next-to-record 27.2 bushels per acre this year, and are above the 1958-67 average of 20.9 bushels per acre.

The 1969 crop of spring wheat, forecast at 663.4 million bushels is being harvested from a seeded area of 24.6 million acres and yielding an indicated 27.0 bushels per acre. The 1968 spring wheat crop of 634.9 million bushels was produced on 29.1 million acres and yielded an average of 21.8 bushels per acre. The 1969 yield for Ontario's winter wheat crop is placed at 40.7 bushels per acre as compared with 42.0 bushels in 1968. In spite of a one per cent increase in harvested acreage this year's production at 14.7 million bushels is below the 14.9 million in 1968.

August Forecast of the 1969 Production of Wheat, Canada and Provinces
Compared with 1968

Province	Area		Yield per acre		Production	
	1968	1969	1968 ^r	1969(1)	1968 ^r	1969(1)
	acres		bushels		bushels	
<u>All wheat</u>						
Canada	29,422,500	24,967,700	22.1	27.2	649,844,000	678,099,000
Ontario	366,000	369,300	41.6	40.4	15,208,000	14,912,000
<u>Spring wheat</u>						
Canada(2)	29,067,500	24,607,700	21.8	27.0	634,934,000	663,447,000
Prince Edward						
Island	2,000	2,500	37.0	36.9	74,000	92,000
Nova Scotia	2,000	3,200	41.0	46.0	82,000	147,000
New Brunswick	4,500	3,700	33.1	38.4	149,000	142,000
Quebec	30,000	29,000	27.7	27.8	831,000	806,000
Ontario	11,000	9,300	27.1	28.0	298,000	260,000
Manitoba(2)	3,400,000	2,500,000	26.8	27.2	91,000,000	68,000,000
Saskatchewan(2) ..	19,000,000	16,600,000	19.6	26.9	372,000,000	447,000,000
Alberta(2)	6,460,000	5,300,000	25.7	27.0	166,000,000	143,000,000
Br. Columbia	158,000	160,000	28.5	25.0	4,500,000	4,000,000
<u>Winter wheat</u>						
Canada(3)	355,000	360,000	42.0	40.7	14,910,000	14,652,000

(1) As indicated on basis of conditions on or about August 15.

(2) Includes durum wheat.

(3) Winter wheat estimates apply to Ontario only. The western wheat crop contains a relatively small proportion of winter wheat but, due to difficulties encountered in obtaining acreage data required for a separate winter wheat estimate in the Prairie Provinces, all western wheat is currently included under spring wheat.

^r Revised figures.

In the Prairie Provinces, the 1969 wheat crop is forecast at 658.0 million bushels, some 5 per cent above last year's crop of 629.0 million and 22 per cent above the ten-year (1958-67) average of 540.0 million. The forecasted average yield per seeded acre in the Prairie Provinces, on the basis of conditions at August 15, is 27.0 bushels per acre, with the Manitoba average 27.2, Saskatchewan 26.9 and Alberta 27.0 bushels per acre. Production in each of these provinces in millions of bushels, with last year's estimate in brackets, is as follows: Manitoba, 68.0 (91.0) Saskatchewan, 447.0 (372.0) and Alberta, 143.0 (166.0). Relatively small amounts of winter wheat are included in these forecasts for the Prairie Provinces.

Durum wheat. — The indicated production of durum wheat, which is included in the above forecast of spring wheat is a record 85.6 million bushels compared with last year's revised estimate of 45.4 million. Forecasts of 1969 production in each of the Prairie Provinces in millions of bushels, with last year's estimates in brackets are: Manitoba, 4.1 (2.9) Saskatchewan, 70.0 (35.0) and Alberta, 11.5 (7.5). The acreage seeded to this crop was 33 per cent larger than in 1968. Yields per acre in 1969 with 1968 figures in brackets are: Manitoba, 24.1 (22.3) Saskatchewan a record 26.9 (17.5) Alberta, 29.9 (31.2) and the Prairie Provinces a record 27.1 (19.2).

Delivery Quota on Durum Wheat The Canadian Wheat Board in its Instructions to the Trade re Quotas (General) No. 6 under date of September 2, 1969 announced that effective immediately and until Friday, November 28, 1969 a supplementary quota on high grade durum wheat of five bushels per acre seeded to durum wheat is hereby established at all delivery points.

Grades of durum eligible for delivery under this special supplementary quota are as follows:

- 1 C.W. Amber Durum, including toughs
- 2 C.W. Amber Durum, including toughs
- 3 C.W. Amber Durum, including toughs
- Extra 4 C.W. Amber Durum, including toughs
- 4 C.W. Amber Durum, including toughs

Lower grades of durums may only be accepted under regular quotas in effect.

The reason for this temporary supplementary quota is to meet overseas and domestic requirements for durum wheat. However, due to congestion which exists in practically all commercial facilities, the Board is not in a position to guarantee that all producers will have the opportunity to deliver durum within the specified period.

Price Set for Wheat for Human Consumption The Canadian Wheat Board in its Instructions to the Trade No. 14 under date of September 2, 1969 stated that the Government has announced that effective from August 1, 1969, all wheat used for human consumption in Canada shall be priced at the level established by the Government of Canada of \$1.95 1/2 per bushel basis No. 1 Northern in store Fort William-Port Arthur.

As a consequence, the Board will not permit over-quota deliveries of wheat for gristing in the 1969-70 crop year.

Wheat Production in
Canada and the Prairie
Provinces 1919-69

The first forecast of the 1969 wheat crop in Canada, based on conditions at August 15, placed the probable outturn at 678.1 million bushels, of which the Prairie Provinces accounted for 658.0 million. If a crop this size is realized, it would be 4 per cent more than last year's harvest of 649.8 million and 21 per cent above the ten-year (1958-67) average of 560.4 million.

Wheat Production in Canada and the Prairie Provinces, 1919-69

Year	Canada	Manitoba	Saskatchewan	Alberta	Three Prairie Provinces
			thousand bushels		
1919	193,260	40,975	89,994	34,575	165,544
1920	263,189	37,542	113,135	83,461	234,138
1921	300,858	39,054	188,000	53,044	280,098
1922	399,786	60,051	250,167	64,976	375,194
1923	474,199	35,804	271,622	144,834	452,260
1924	262,097	41,464	132,918	61,312	235,694
1925	395,475	33,624	235,472	97,962	367,058
1926	407,136	47,133	219,646	113,986	380,765
1927	479,665	30,773	252,500	171,286	454,559
1928	566,726	52,383	321,215	171,000	544,598
1929	302,192	28,565	160,565	90,206	279,336
1930	420,672	43,600	206,700	147,000	397,300
1931	321,325	28,112	132,466	140,603	301,181
1932	443,061	44,041	211,551	167,355	422,947
1933	281,892	32,666	128,004	102,334	263,004
1934	275,849	37,100	114,200	112,500	263,800
1935	281,935	23,250	142,198	98,648	264,096
1936	219,218	26,000	110,000	66,000	202,000
1937	180,210	45,100	36,000	75,700	156,800
1938	360,010	50,000	137,800	148,200	336,000
1939	520,623	61,300	271,300	161,400	494,000
1940	540,190	66,400	266,700	180,700	513,800
1941	314,710	51,000	147,000	98,000	296,000
1942	556,067	53,000	305,000	171,000	529,000
1943	282,377	39,000	146,000	82,800	267,800
1944	414,859	50,300	242,100	99,300	391,700
1945	316,320	38,800	168,100	87,700	294,600
1946	411,601	58,000	208,000	127,000	393,000
1947	338,506	42,000	173,000	105,000	320,000
1948	381,413	50,000	191,000	115,000	356,000
1949	366,028	52,000	186,000	103,000	341,000
1950	466,490	50,000	272,000	117,000	439,000
1951	553,678	53,000	325,000	152,000	530,000
1952	701,973	57,000	449,000	172,000	678,000
1953	634,040	48,000	391,000	165,000	604,000
1954	331,981	29,000	169,000	107,000	305,000
1955	519,178	42,000	320,000	135,000	497,000
1956	573,040	56,000	355,000	140,000	551,000
1957	392,719	49,000	229,000	93,000	371,000
1958	398,077	61,000	213,000	98,000	372,000
1959	445,077	62,000	253,000	115,000	430,000
1960	518,379	66,000	327,000	105,000	498,000
1961	283,394	34,000	137,000	89,000	260,000
1962	565,554	80,000	354,000	112,000	546,000
1963	723,442	61,000	493,000	149,000	703,000
1964	600,424	85,000	348,000	145,000	578,000
1965	648,917	79,000	400,000	153,000	632,000
1966	827,338	79,000	537,000	191,000	807,000
1967	592,920	90,000	339,000	145,000	574,000
1968 ^r	649,844	91,000	372,000	166,000	629,000
1969(1)	678,099	68,000	447,000	143,000	658,000

(1) Based on conditions on or about August 15, 1969.

^r Revised figures.

Carryover Stocks
of Canadian Grain
at July 31, 1969

Total carryover stocks of the six major Canadian grains in all North American positions at July 31, 1969 were estimated at 1,194.0 million bushels, 33 per cent above last year's revised total of 895.4 million, reflecting increases in wheat, oats, barley and rye which more than offset decreases in flaxseed and rapeseed.

Total stocks of wheat were estimated at 849.8 million bushels, 28 per cent above last year's revised estimate of 665.5 million. Stocks of oats in all positions estimated at 128.5 million bushels, were 67 per cent larger than last year's 77.0 million. Barley stocks, at 197.7 million bushels, increased by 51 per cent over the 130.9 million held in 1968. Carryover stocks of rye in all positions, estimated at 8.4 million bushels, were also above last year's 7.5 million. July-end carryover stocks of flaxseed at 4.7 million bushels remained unchanged from the previous year but rapeseed, at 4.9 million decreased sharply from last year's figure of 9.9 million.

Stocks of Canadian Grain at July 31, 1969

Position	Wheat	Oats	Barley	Rye	Flaxseed	Rapeseed
thousand bushels						
<u>In Canada</u>						
On farms	372,200	94,500	138,500	5,000	800	700
Country elevators(1)	285,401	18,137	40,808	1,674	1,169	2,317
Interior private and mill elevators(1)	5,129	335	74	34	29	281
Interior terminal elevators	11,820	10	2,347	1	1	1
Vancouver - New Westminster	9,894	146	1,966	268	730	922
Victoria elevator	706	—	—	—	—	—
Prince Rupert elevators	1,336	1	1	—	—	—
Churchill elevator	4,503	45	—	—	—	—
Fort William - Port Arthur elevators	52,580	11,179	6,207	847	1,192	100
In transit rail, western division(1)	28,498	870	4,255	325	546	537
In transit lake	3,263	293	1,175	6	158	—
Eastern elevators	72,259	2,241	2,322	263	33	71
Eastern mills(1)	2,063	709	—	—	—	—
Western mills(1)	169	7	4	28	—	—
Totals in Canada(1)	849,821	128,473	197,659	8,446	4,658	4,929
<u>In United States</u>	—	—	—	—	—	—
Totals, Canadian grain in Canada and United States, July 31, 1969(1)	849,821	128,473	197,659	8,446	4,658	4,929
<u>Comparative stocks, July 31, 1968^r</u>						
In Canada	665,510	76,951	130,917	7,260	4,678	9,923(2)
In United States	—	—	—	198	—	—
Totals in Canada and United States	665,510	76,951	130,917	7,458	4,678	9,923(2)

(1) Preliminary revised — Subject to further revision.

(2) Includes Canadian Wheat Board estimate for farm stocks.

^r Revised figures.

In the Prairie Provinces farm-held stocks of wheat, oats, barley, rye, flaxseed and rapeseed at July 31, 1969 amounted to 590.5 million bushels, sharply above the July-end 1968 total of 347.9 million. Since the bulk of farm stocks of grain is held in Western Canada, stocks in the Prairie Provinces have been segregated from the above table for ease in comparison with last year's totals.

Estimated Farm Stocks in the Prairie Provinces, July 31, 1969 and 1968

Province	Wheat	Oats	Barley	Rye	Flaxseed	Rapeseed
thousand bushels						
Manitoba	40,000	25,000	20,000	1,000	200	100
Saskatchewan	245,000	26,000	48,000	3,000	400	400
Alberta	85,000	29,000	66,000	1,000	200	200
Totals, July 31, 1969(1)	370,000	80,000	134,000	5,000	800	700
Totals, July 31, 1968	233,000	42,000	68,000	1,900	600	2,434(2)

(1) Subject to revision.

(2) Canadian Wheat Board estimate.

Canadian Wheat Preliminary estimates place total stocks of Canadian wheat in all North American positions at July 31, 1969 at an all-time high of 849.8 million bushels compared with last year's revised estimate of 665.5 million and the previous record of 733.5 million in 1957. An estimated 372.2 million bushels of this year's total were held on farms, while 285.4 million of the off-farm stocks were in country elevators. The next largest amounts, 72.3 million and 52.6 million bushels, were in store in Eastern elevators and Fort William-Port Arthur terminals respectively.

It should be pointed out that the figures in the table below are not strictly comparable because of certain omissions in the earlier years. Stocks of Canadian wheat held in bond by United States flour mills were omitted each year until 1940-41 when they were included for the first time. The carryover totals now include all Canadian wheat in North American positions whether on farms, in store or in transit.

Carryover of Canadian Wheat in Canada and the United States, July 31, 1938-69

Year	Carryover of wheat in Canada	Stocks of Canadian wheat in U.S. positions thousand bushels	Total carryover of Canadian wheat in Canada and U.S.
1938	23,553	983	24,536
1939	94,632	8,279	102,911
1940	272,928	27,546	300,473
1941	448,338	31,792	480,129
1942	404,897	18,856	423,752
1943	579,371	15,255	594,626
1944	338,138	18,394	356,531
1945	238,480	19,593	258,073
1946	73,466	134	73,600
1947	86,055	87	86,141
10-year average 1938-47	255,986	14,092	270,077
1948	77,676	35	77,710
1949	102,343	68	102,411
1950	112,200	—	112,200
1951	187,190	2,013	189,203
1952	214,934	2,244	217,178
1953	382,546	640	383,185
1954	618,568	107	618,675
1955	536,302	446	536,748
1956	578,803	771	579,574
1957	733,335	211	733,546
10-year average 1948-57	354,390	654	355,043
1958	648,454	—	648,454
1959	587,842	159	588,001
1960	599,588	—	599,588
1961	608,341	—	608,341
1962	391,058	—	391,058
1963	487,247	—	487,247
1964	459,440	—	459,440
1965	513,024	—	513,024
1966	420,122	—	420,122
1967	576,751	—	576,751
10-year average 1958-67	529,187	16	529,203
1968 ^r	665,510	—	665,510
1969 ^p	849,821	—	849,821

^p Preliminary figures.

^r Revised figures.

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

Week ending		Manitoba	Saskatchewan	Alberta	Total	Last year ^r
bushels						
August	7, 1968	12,286	343,145	1,256	356,687	3,531,842
	14	54,003	433,143	19,546	506,692	410,477
	21	701,320	618,402	734,805	2,054,527	2,368,907
	28	319,028	1,772,613	649,209	2,740,850	5,893,733
September	4	248,115	2,325,413	840,579	3,414,107	14,505,278
	11	146,995	1,597,665	749,639	2,494,299	19,166,857
	18	386,716	4,847,811	2,241,941	7,476,468	12,002,246
	25	560,570	4,814,363	1,744,398	7,119,331	12,262,382
October	2	578,728	4,171,612	1,148,224	5,898,564	8,987,247
	9	1,412,243	6,689,883	3,152,542	11,254,668	5,351,929
	16	914,936	4,950,252	1,904,238	7,769,426	7,247,758
	23	827,874	4,038,282	1,889,876	6,756,032	7,562,502
	30	831,989	5,268,762	4,080,886	10,181,637	9,262,642
November	6	1,653,791	7,100,994	4,580,760	13,335,545	9,717,801
	13	2,037,836	9,768,838	3,876,116	15,682,790	8,840,798
	20	2,099,771	7,917,084	3,227,126	13,243,981	11,217,381
	27	1,661,638	5,918,922	2,334,940	9,915,500	10,032,019
December	4	1,454,530	5,283,400	2,524,710	9,262,640	13,270,298
	11	924,844	3,683,325	1,936,615	6,544,784	15,836,937
	18	886,759	3,627,473	1,257,373	5,771,605	9,311,891
	23	819,810	3,417,705	1,647,864	5,885,379	6,742,989
	31	405,023	1,773,314	1,050,722	3,229,059	7,572,454
January	8, 1969	367,174	2,544,883	1,452,240	4,364,297	4,968,322
	15	416,690	1,351,887	1,047,114	2,815,691	5,554,999
	22	567,950	1,139,430	1,019,662	2,727,042	18,411,991
	29	280,390	814,599	587,479	1,682,468	10,617,794
February	5	255,056	465,482	703,518	1,424,056	5,548,689
	12	485,168	2,509,965	2,902,341	5,897,474	10,319,185
	19	544,539	3,121,188	2,416,389	6,082,116	8,222,761
	26	763,276	3,905,593	2,248,441	6,917,310	4,789,373
March	5	846,130	2,958,912	2,043,881	5,848,923	7,453,488
	12	959,884	4,911,870	2,724,281	8,596,035	6,525,279
	19	975,957	4,280,914	2,985,665	8,242,536	8,254,395
	26	927,805	4,944,237	2,787,007	8,659,049	7,814,669
April	2	772,624	3,472,361	2,342,123	6,587,108	5,208,385
	9	479,651	2,498,795	1,847,450	4,825,896	5,139,919
	16	382,006	1,191,820	2,432,215	4,006,041	3,987,431
	23	497,967	4,403,412	2,222,129	7,123,508	6,124,617
	30	635,750	7,332,422	1,754,416	9,722,588	6,945,084
May	7	637,801	5,165,916	1,778,916	7,582,633	4,895,997
	14	728,083	3,851,829	655,485	5,235,397	4,076,927
	21	933,144	2,128,540	1,514,667	4,576,351	3,902,474
	28	552,086	3,048,278	1,165,489	4,765,853	7,104,613
June	4	1,053,353	6,935,890	2,337,079	10,326,322	9,954,109
	11	2,271,798	8,301,180	3,168,421	13,741,399	12,510,162
	18	3,255,854	8,965,920	2,900,829	15,122,603	12,292,525
	25	2,870,427	8,053,016	2,967,569	13,891,012	12,582,318
July	2	1,651,761	5,849,695	2,708,385	10,209,841	11,569,445
	9	2,256,735	4,912,908	2,730,023	9,899,666	8,980,513
	16	2,294,501	7,753,558	3,591,807	13,639,866	7,696,472
	23	3,492,306	12,019,929	3,383,197	18,895,432	10,917,414
	31	9,014,934	33,892,923	7,812,568	50,720,425	22,549,562
Totals		60,109,605	253,089,753	111,824,151	425,023,509	456,015,280
Average similar						
period: 1958-59 - 1967-68		55,593,696	300,287,850	111,414,679	467,296,225	

(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, August 20, 1969
Compared with Approximately the Same Date, 1967 and 1968

Position	1967	1968	1969
	thousand bushels		
Country elevators — Manitoba	17,877	35,876	34,775
Saskatchewan	105,474	145,557	164,333
Alberta	61,905	69,697	81,732
Sub-totals	185,256	251,130	280,840
Interior private and mill	6,089	4,691	4,257
Interior terminals	13,466	13,696	12,796
Vancouver-New Westminster	11,069	10,657	12,868
Victoria	834	949	875
Prince Rupert	647	475	1,644
Churchill	4,166	3,508	2,985
Fort William-Port Arthur	52,248	63,026	54,630
In transit rail (western division)	8,978	20,812	24,913
Bay, Lake and Upper St. Lawrence ports ..	34,795	26,992	36,884
Lower St. Lawrence and Maritime ports ...	31,079	13,123	39,450
In transit lake	5,735	930	2,496
In transit rail (eastern division)	202	200	—
Totals	354,564	410,189	474,638

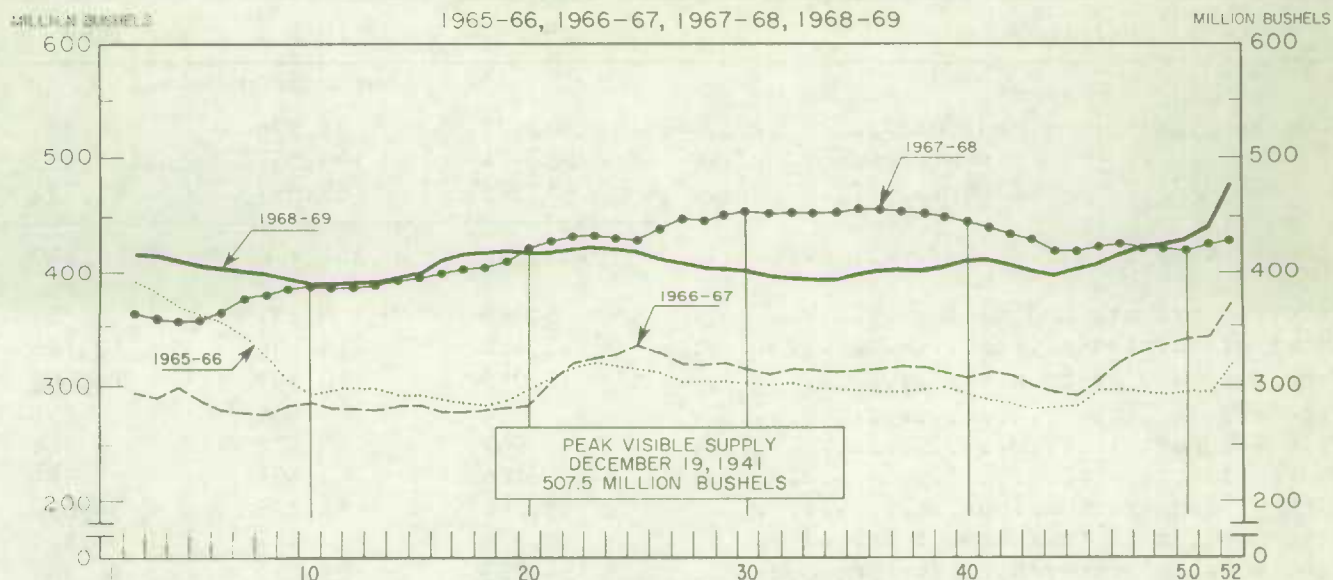
Grading of Wheat Inspected, August 1968 — July 1969 with Comparisons

Grade	Crop year				
	Average	1967-68		1968-69	
	1962-63- 1966-67				
	per cent	cars	per cent	cars	percent
No. 1 Man. Northern	5.1	56,790	27.9	25,524	12.1
No. 2 Man. Northern	35.8	88,499	43.4	67,486	31.9
No. 3 Man. Northern	22.7	30,149	14.8	21,870	10.3
No. 4 Man. Northern	10.5	6,060	3.0	8,772	4.1
No. 5 Wheat	4.5	870	0.4	6,138	2.9
No. 6 Wheat	0.6	276	0.1	405	0.2
Feed Wheat	(1)	40	(1)	51	(1)
Others Red Spring	13.3	8,233	4.0	67,930	32.1
C.W. Garnet	0.2	571	0.3	127	0.1
C.W. White Spring	0.1	231	0.1	346	0.2
C.W. Mixed Wheat	0.1	131	0.1	98	(1)
Alberta Winter	0.7	2,019	1.0	874	0.4
Nos. 1-6 C.W. Amber Durum	5.8	9,556	4.7	6,137	2.9
Others C.W. Amber Durum	0.4	408	0.2	5,846	2.8
Totals	100.0	203,833	100.0	211,604	100.0
Gross bushels (approx.)		395,436,000 ^r		401,677,000	

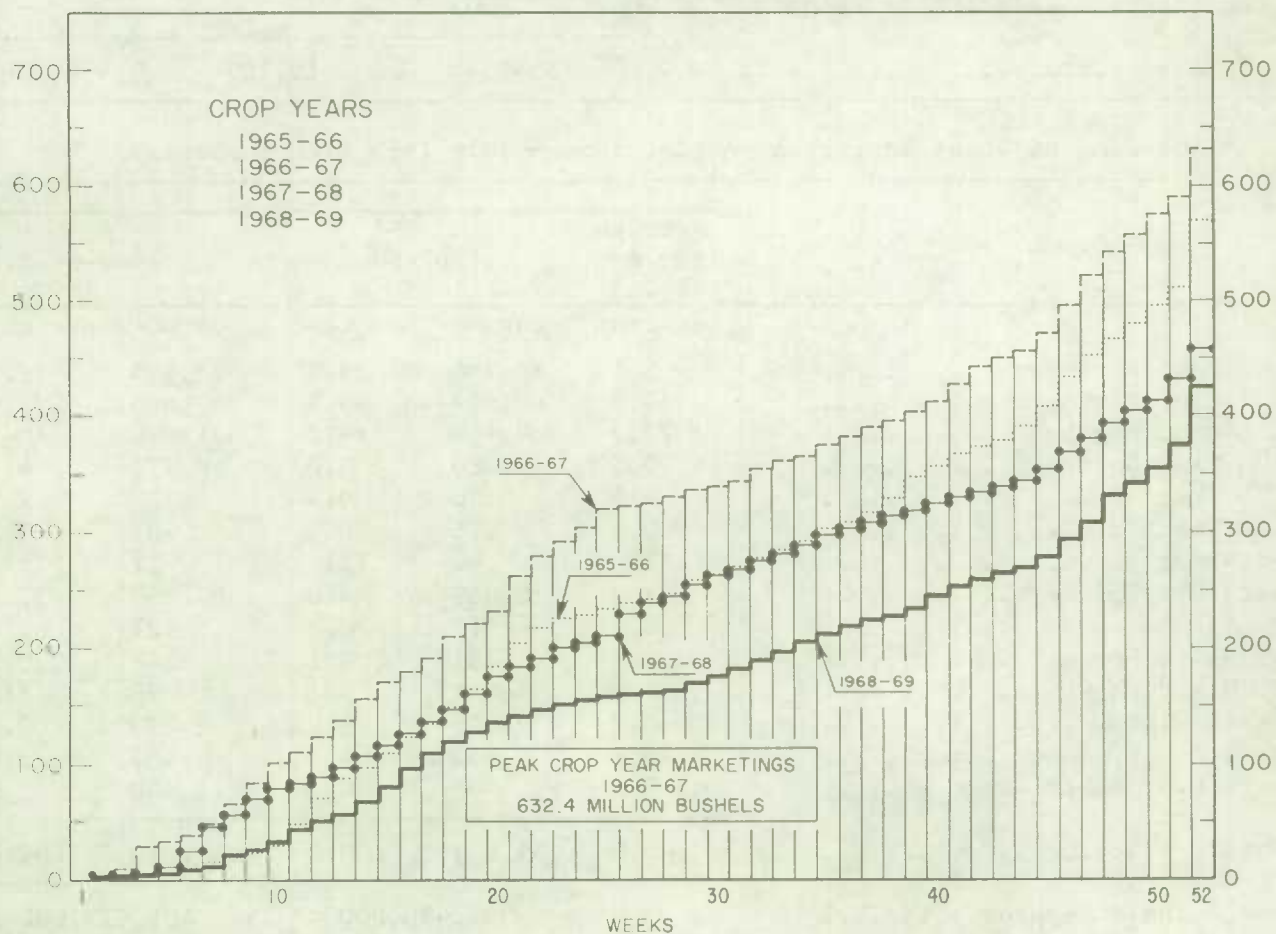
(1) Less than .05 per cent.

^r Revised figure.

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)

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, during the crop year 1968-69. During 1967-68 and 1966-67 crop years shipments amounted to 4,000 and 155,000 bushels, respectively.

Wheat Shipments(1) to the United States by Destination
Crop Year 1968-69 with Comparisons

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

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

Rail Shipments
of Wheat to
Maritime Ports

Rail shipments of wheat to Maritime ports from Bay, Lake and Upper St. Lawrence ports during the 1968-69 crop year totalled 17.0 million bushels, sharply above the 1967-68 crop year figure of 11.7 million.

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

Origin of shipments	August 1, 1967 — July 31, 1968	August 1, 1968 — July 31, 1969
		bushels
Port McNicoll	3,940,013	4,903,780
Midland, Tiffin	2,371,831	4,813,309
Collingwood	366,430	63,817
Owen Sound	2,770,779	2,315,547
Goderich	1,474,337	1,782,903
Sarnia	726,274	1,265,504
Port Colborne	9,383	1,843,418
Totals	11,659,047	16,988,278

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

Month	1965-66	1966-67	1967-68	1968-69
bushels				
August	10,458	118,973	133,651	—
September	10,500	83,333	182,051	23,084
October	4,500	89,384	152,009	57,458
November	10,205	163,332	50,475	101,966
December	7,500	106,833	143,833	44,136
January	46,108	145,889	160,214	131,034
February	26,712	120,334	143,884	99,776
March	98,598	177,393	274,690	153,067
April	71,701	133,699	123,167	79,899
May	89,166	207,038	61,460	108,339
June	178,183	154,139	101,950	120,532
July	82,282	93,094	88,500	137,404
Totals	635,913	1,593,441	1,615,884	1,056,695

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

Grade	Prince Edward Island	Nova Scotia	New Brunswick	Quebec	Ontario
bushels					
5 Wheat	—	2,667	—	2,000	1,333
6 Wheat	3,000	18,833	88,500	—	—
Rejected	—	—	—	2,987	—
Durum	—	—	—	4,000	7,500
Others	—	—	—	4,303	2,281
Totals	3,000	21,500	88,500	13,290	11,114

Overseas Exports of Canadian Grain by Ports of Loading, August 1, 1968 - July 31, 1969
with Comparisons

Port	Wheat(1)	Durum wheat(1)	Oats(1)	Barley	Rye	Flaxseed	Rapeseed
thousand bushels							
<u>Pacific Seaboard</u>							
Van.-New West.	141,744	669	231	11,195	1,819	6,277	13,505
Victoria	6,803	—	—	—	—	—	—
Prince Rupert	4,904	—	—	—	—	—	—
<u>Churchill</u>	22,582	—	—	—	—	—	—
<u>Lakehead direct</u>	3,636	853	679	2,339	1,312	2,815	709
<u>Toronto direct</u>	93	—	—	—	—	—	—
<u>Prescott direct</u>	336	—	—	—	—	—	—
<u>St. Lawrence</u>							
Montreal	12,686	9,179	336	—	100	310	—
Sorel	3,605	—	—	—	—	—	—
Trois Rivières	3,954	259	26	—	122	6	—
Quebec	8,219	1,315	—	—	—	1,019	—
Baie Comeau	16,033	600	—	—	—	1,827	—
Port Cartier	17,440	5,304	—	—	—	277	—
<u>Maritime</u>							
Saint John	474	—	—	—	—	—	—
West Saint John	10,135	446	53	—	—	891	—
Halifax	9,273	—	—	—	—	—	—
Totals	261,917	18,624	1,325	13,533	3,354	13,421	14,214
August 1, 1967 - July 31, 1968 ^r	297,481	13,184	1,789	31,711	4,000	12,611	12,279

(1) Excluding seed.
^r Revised figures.

Shipments Under
Feed Grain
Assistance Regulations

Claims filed for payment represent the movement of 7,806 thousand bushels of wheat from the Prairie Provinces to Eastern Canada and British Columbia under the Feed Grain Assistance Regulations during August-June 1968-69 crop year. Revised data on the August 1967-June 1968 shipments of wheat based on claims submitted up to June 30, 1969 place the eleven-month total at 10,569 thousand bushels. The bulk of the shipments during the current eleven months under review went to destinations in Quebec, British Columbia and Ontario with these three provinces accounting for a combined 86 per cent of the total.

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

Month	Nfld.	P.E.I.	N.S.	N.B.	Que.	Ont.	B.C.	Total	Eastern wheat
thousand bushels									
August 1968	4	20	111	32	327	70	71	635	34
September	3	8	40	13	279	92	157	592	39
October	4	5	65	14	366	106	277	837	23
November	4	12	61	15	351	103	308	854	33
December	5	5	41	8	348	113	189	709	16
January 1969	4	9	40	17	433	131	278	911	20
February	4	1	72	21	334	94	131	655	19
March	9	5	38	3	303	75	17	450	2
April	—	—	—	—	—	—	—	—	—
May	(1)	8	81	53	422	88	247	898	12
June	68	9	100	71	475	275	264	1,263	21
Totals	105	82	649	247	3,637	1,147	1,938	7,806	220
Same months 1967-68 ^r	153	142	1,144	248	4,883	1,866	2,133	10,569	104

Preliminary data on millfeed shipments under the Feed Grain Assistance Regulations indicate shipments of 421,398 tons during the August - June period of the current crop year. Revised data on the August - June 1967-68 shipments of millfeeds based on claims submitted up to June 30, 1969 place the eleven-month total at 474,770 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 - June 1968-69 and 1967-68

Province	1967-68 ^r	1968-69
tons		
Newfoundland	7,083	6,350
Prince Edward Island	8,770	6,772
Nova Scotia	30,627	29,496
New Brunswick	29,035	21,764
Quebec	225,371	202,971
Ontario	142,670	124,276
British Columbia	31,214	29,770
Totals	474,770	421,398

(1) Less than 500 bushels

^r Revised figures

Monthly Exports of Canadian Wheat and Wheat Flour

Year and month	Wheat in bulk(1)	Seed wheat(2)	Total wheat	Wheat flour(2,3)	Total wheat and wheat flour(3)
thousand bushels					
<u>1966-67</u>					
August	64,233	132	64,365	2,753	67,118
September	47,357	103	47,460	2,122	49,582
October	51,659	39	51,698	3,551	55,250
November	48,942	53	48,995	2,471	51,466
December	33,477	47	33,523	3,889	37,412
January	27,719	48	27,767	3,004	30,771
February	20,102	52	20,154	1,616	21,771
March	21,718	128	21,845	3,663	25,508
April	27,847	81	27,928	2,475	30,403
May	57,134	11	57,145	2,502	59,647
June	47,517	6	47,522	2,812	50,334
July	35,033	18	35,051	993	36,044
Totals	482,737	719	483,456	31,851	515,307
<u>1967-68</u>					
August	24,424	52	24,477	2,773	27,249
September	20,211	60	20,272	2,037	22,309
October	19,851	67	19,917	1,581	21,498
November	21,967	99	22,066	1,811	23,877
December	12,920	56	12,976	2,355	15,332
January	19,259	56	19,315	1,737	21,052
February	18,903	62	18,965	2,394	21,359
March	21,388	169	21,557	2,621	24,178
April	26,661	5	26,666	2,036	28,702
May	42,311	7	42,317	2,061	44,378
June	40,798	1	40,799	1,349	42,148
July	41,975	18	41,993	1,937	43,930
Totals	310,669	651	311,320	24,690	336,010
<u>1968-69(4)</u>					
August	31,127	1	31,128	2,270	33,398
September	30,019	45	30,064	2,437	32,500
October	25,995	(5)	25,996	2,079	28,074
November	23,338	68	23,406	2,053	25,459
December	16,061	50	16,112	1,934	18,045
January	18,843	9	18,853	1,574	20,427
February	24,149	31	24,181	2,005 ^r	26,186 ^r
March	19,857	134	19,990	2,544	22,534
April	10,278	82	10,361	1,249	11,610
May	30,350	136	30,487	1,572	32,059
June	24,016	10	24,027	2,032	26,059
July	26,506	44	26,550	2,864	29,414
Totals	280,541	612	281,153	24,611	305,764

(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, July 1969 and 1968

Destination	Wheat (except durum)	Durum wheat	All wheat	
			July 1969	July 1968 ^r
bushels				
<u>Western Europe</u>				
EEC:				
Belgium and Luxembourg	1,051,080	—	1,051,080	1,027,954
France	124,399	—	124,399	308,957
Germany, Federal Republic	603,477	338,397	941,874	1,409,292
Italy	3,259,311	902,684	4,161,995	2,523,054
Netherlands	386,508	104,589	491,097	154,340
Sub-totals	5,424,775	1,345,670	6,770,445	5,423,597
<u>Other Western Europe</u>				
Britain	3,183,211	98,933	3,282,144	3,538,447
Ireland	177,333	—	177,333	268,689
Sweden	—	—	—	22,400
Switzerland	360,849	—	360,849	129,921
Sub-totals	3,721,393	98,933	3,820,326	3,959,457
Totals	9,146,168	1,444,603	10,590,771	9,383,054
<u>Eastern Europe</u>				
Albania	—	—	—	1,122,464
Poland	—	—	—	3,254,515
U.S.S.R. (Russia)	—	—	—	3,655,516
Total	—	—	—	8,033,495
<u>Africa</u>				
Ghana	173,338	—	173,338	63,202
Nigeria	—	—	—	103,600
Sudan	—	—	—	24,066
Totals	173,338	—	173,338	190,868
<u>Asia</u>				
Hong Kong	56,187	—	56,187	75,600
India	—	—	—	11,441,618
Japan	3,232,938	—	3,232,938	5,760,838
Malaysia	70,933	—	70,933	74,853
People's Republic of China	11,245,411	—	11,245,411	6,344,377
Taiwan	505,221	—	505,221	—
Totals	15,110,690	—	15,110,690	23,697,286
<u>Western Hemisphere</u>				
Barbados	—	—	—	20
Cuba	—	—	—	413,281
Ecuador	116,293	—	116,293	112,000
Jamaica	1,196	—	1,196	1,493
Venezuela	513,282	—	513,282	143,733
Totals	630,771	—	630,771	670,527
Sub-totals, all countries	25,060,967	1,444,603	26,505,570	41,975,230
Seed wheat(2)			44,224	17,729
Totals, all countries	25,060,967	1,444,603	26,549,794	41,992,959

(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 - July 1969			Total same period last year ^r
	Wheat (except durum)	Durum wheat	Total wheat	
bushels				
<u>Western Europe</u>				
EEC:				
Belgium and Luxembourg ..	7,359,555	90,600	7,450,155	9,875,136
France	2,096,781	2,285,515	4,382,296	856,123
Germany, Federal Republic	8,231,959	4,572,882 ^r	12,804,841 ^r	17,546,791
Italy	9,334,964	5,862,095	15,197,059	10,150,790
Netherlands	5,326,257	558,055 ^r	5,884,312 ^r	4,999,733
Sub-totals	32,349,516	13,369,147 ^r	45,718,663 ^r	43,428,573
<u>Other Western Europe</u>				
Austria	—	768,438	768,438	638,430
Britain	55,328,078	383,593 ^r	55,711,671 ^r	62,064,357
Denmark	22,027	—	22,027	31,733
Finland	638,500	—	638,500	962,240
Ireland	983,733	—	983,733	1,428,120
Malta and Gozo	588,592	—	588,592	572,320
Norway	588,000	—	588,000	1,706,955
Sweden	80,304	—	80,304	74,667
Switzerland	2,996,663	2,593,291 ^r	5,589,954 ^r	2,595,925
Sub-totals	61,225,897	3,745,322 ^r	64,971,219 ^r	70,074,747
Totals	93,575,413	17,114,469	110,689,882	113,503,320
<u>Eastern Europe</u>				
Albania	—	—	—	1,863,568
Czechoslovakia	—	—	—	4,399,568
Hungary	2,939,633	—	2,939,633	2,443,570
Poland	3,267,960	146,981	3,414,941	5,755,459
U.S.S.R. (Russia)	1,734,881	—	1,734,881	49,030,515
Totals	7,942,474	146,981	8,089,455	63,492,680
<u>Africa</u>				
Algeria	1,796,005	—	1,796,005	818,577
Congo	36,500	—	36,500	—
Ghana	1,779,115	—	1,779,115	265,249
Mauritania	1,212	—	1,212	—
Niger	687,344	—	687,344	—
Nigeria	—	—	—	686,000
Republic of South Africa ..	—	—	—	901,600
Sierra Leone	141,866	—	141,866	—
Sudan	—	—	—	60,261
Tanzania	110,235	—	110,235	298,680
Tunisia	—	692,139	692,139	461,626
Totals	4,552,277	692,139	5,244,416	3,491,993

See footnotes at end of table.

Cumulative Exports of Canadian Wheat(1) by Destination

Destination	August 1968 - July 1969			Total same period last year ^r
	Wheat (except durum)	Durum wheat	Total wheat	
	bushels			
<u>Asia</u>				
Afghanistan	6,154	—	6,154	—
Hong Kong	836,044	—	836,044	915,413
India	15,306,956	—	15,306,956	22,394,749
Indonesia	29,394	—	29,394	—
Iraq	12,860	—	12,860	44,092
Israel	522,000	—	522,000	—
Japan	42,600,271	668,755	43,269,026	40,843,024
Jordan	—	—	—	12,860
Lebanon	—	—	—	8,613
Malaysia	456,628	—	456,628	519,307
Pakistan	2,753,926	—	2,753,926	875,609
People's Republic of China .	83,061,771	—	83,061,771	52,012,941
Philippines	—	—	—	927,733
Saudi Arabia	—	—	—	146,249
Singapore	160,767	—	160,767	195,627
Syria	2,020,883	—	2,020,883	170,130
Taiwan	1,026,058	—	1,026,058	902,249
Turkey	32,518	—	32,518	124,927
Totals	148,826,230	668,755	149,494,985	120,093,523
<u>Western Hemisphere</u>				
Bahamas	40	—	40	—
Barbados	139	—	139	60
Cuba	1,712,200	—	1,712,200	5,907,522
Ecuador	528,443	—	528,443	405,456
El Salvador	—	—	—	167,488
Guatemala	16,667	—	16,667	3,685
Haiti Republic	328,533	—	328,533	—
Jamaica	1,181,927	—	1,181,927	459,441
Paraguay	1,727	—	1,727	—
St. Lucia	187	—	187	373
Trinidad and Tobago	220,133	—	220,133	—
Venezuela	3,030,473	1,823	3,032,296	3,139,111
United States(2)	—	—	—	4,357
Totals	7,020,469	1,823	7,022,292	10,087,493
Sub-totals, all countries	261,916,863	18,624,167	280,541,030	310,669,009
Seed wheat(3)			612,039	651,261
Totals, all countries .	261,916,863	18,624,167	281,153,069	311,320,270

(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 America 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	April	July	August — July	
	1969(1)	1969(2)	1968-69(2)	1967-68(1)
			bushels	
<u>Western Europe</u>				
EEC:				
Belgium and Luxembourg ..	9,170	5,221	111,217	97,752
Italy	2,070	2,070	18,630	22,655
Netherlands	225	226	3,770	16,921
Sub-totals	11,465	7,517	133,617	137,328
<u>Other Western Europe</u>				
Britain	165,954	91,835	2,385,666	2,888,384
Denmark	—	—	460	1,380
Gibraltar	2,576	—	7,728	17,388
Greece	—	—	57,875	64,986
Iceland	—	—	3,386	6,035
Ireland	—	—	5,538	9,338
Norway	115	—	230	115
Portugal	—	920	37,371	75,341
Spain	—	—	—	1,967
Sweden	—	—	515	515
Switzerland	—	—	—	92
Sub-totals	168,645	92,755	2,498,769	3,065,541
Totals	180,110	100,272	2,632,386	3,202,869
<u>Africa</u>				
Algeria	—	—	65,870	138,941
Angola	—	934	20,714	28,681
Cameroun Republic	—	—	27,152	31,025
Congo-Kinshasa	1,725	1,150	65,205	80,334
Dahomey	—	6,267	41,570	48,024
French Africa nes	—	—	8,285	—
Gambia	9,894	—	60,111	96,101
Ghana	—	84,817	1,334,471	1,485,846
Guinea Republic	9,200	—	114,237	12,650
Ivory Coast	—	—	5,865	8,294
Liberia	5,520	22,352	190,176	188,956
Libya	—	—	—	225
Malawi	2,093	2,553	53,247	65,872
Morocco	—	—	—	53,243
Mozambique	3,160	5,184	58,144	44,144
Nigeria	—	—	230	—
Portuguese Africa nes	3,289	1,610	74,228	41,158
Republic of South Africa ..	—	—	—	6,751
Senegal	—	—	—	460
Sierra Leone	—	—	9,462	11,884
Tanzania	—	—	6,900	12,880
Togo	3,956	22,103	153,713	157,053
Tunisia	—	—	—	2,222
U.A.R. — Egypt	—	—	767,413	36,963
Zambia	—	2,300	4,600	6,900
Totals	38,837	149,270	3,061,593	2,558,607

See footnotes at end of table.

Customs Exports of Canadian Wheat Flour by Countries of Consignment

Destination	April 1969(1)	July 1969(2)	August - July	
			1968-69(2)	1967-68(1)
bushels				
Asia				
Aden	—	—	—	6,440
Afghanistan	—	—	621	51
Bahrain	—	—	35	591
Ceylon	12,282	2,530	857,902	859,628
Cyprus	—	—	522	412
Hong Kong	23,686	20,553	347,749	380,377
India	—	—	453	79,962
Indonesia	—	—	618,748	—
Iran	725	—	5,168	1,547
Iraq	—	—	46,522	—
Israel	—	—	228,390	543,837
Japan	690	1,265	8,820	6,944
Jordan	—	—	122	5,219
Korea, South	—	—	7,815	19,470
Lebanon	566	21,295	448,769	195,942
Pakistan	—	—	230	—
Philippines	—	1,840	2,852	354
Portuguese Asia	1,518	1,518	18,527	17,112
Qatar	—	—	798	655
Saudi Arabia	6,440	—	42,442	150,797
Syria	—	—	54,977	116,775
Thailand	4,025	17,652	253,260	214,450
Trucial States	—	—	2,845	322
Viet-Nam	—	—	920	—
Totals	49,932	66,653	2,948,487	2,601,351
Oceania				
British Oceania nes	—	460	7,875	3,105
Fiji	943	1,184	6,543	7,554
New Zealand	—	—	460	173
United States Oceania	460	6,900	31,059	42,780
Totals	1,403	8,544	45,937	53,612
Western Hemisphere				
Bahamas	25,454	12,496	292,721	308,649
Barbados	12,597	19,739	282,047	216,610
Bermuda	8,296	9,246	112,910	107,385
Bolivia	—	—	18,257	18,462
Brazil	—	—	—	110
British Honduras	6,813	6,502	47,736	53,820
Chile	—	—	—	205

See footnotes at end of table.

Customs Exports of Canadian Wheat Flour by Countries of Consignment

Destination	April	July	August - July	
	1969(1)	1969(2)	1968-69(2)	1967-68(1)
	bushels			
<u>Western Hemisphere - Concluded</u>				
Colombia	—	—	—	10,147
Costa Rica	—	—	—	2,350
Cuba(3)	560,142	2,330,192	12,510,930	11,837,592
Dominican Republic	—	—	2,162	2,896
Ecuador	—	—	345	—
El Salvador	—	—	487	483
French Guiana	—	—	—	920
French West Indies	—	—	3,455	9,170
Guatemala	—	—	7,130	6,100
Guyana	5,746	5,550	82,728	79,479
Haiti Republic	2,990	690	297,165	24,973
Honduras Republic	460	380	15,125	24,822
Jamaica	15,971	9,536	162,601	1,476,149
Leeward and Windward Is.	59,604	38,200	823,446	830,847
Netherlands Antilles	13,115	8,432	171,934	134,028
Panama	—	—	2,114	39,914
Paraguay	—	—	2,383	—
Peru	—	345	10,409	22,848
Puerto Rico	—	—	—	96
St. Pierre and Miquelon	2,700	4,255	23,573	26,772
Surinam	—	1,663	10,601	8,342
Trinidad and Tobago	28,299	34,203	552,724	446,384
Venezuela	—	—	945	598
United States Virgin Is.	127	289	669	—
United States	31,584	57,572	488,196	583,581
Totals	773,898	2,539,290	15,922,793	16,273,732
Totals, all countries	1,044,180	2,864,029	24,611,196	24,690,171

(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.

Canadian Wheat Board Weekly Average Cash Wheat Prices, Crop Year 1969-70
Basis in Store Fort William-Port Arthur and Vancouver

Class and grade	Week ending			
	August 8	August 15	August 22	August 29
cents and eighths per bushel				
<u>Initial payment to producers</u>				
1 Northern	150	150	150	150
2 Northern	146	146	146	146
3 Northern	141	141	141	141
4 Northern	133	133	133	133
5 Wheat	119	119	119	119
6 Wheat	115	115	115	115
Feed Wheat	110	110	110	110
1 C.W. Garnet	133	133	133	133
2 C.W. Garnet	128	128	128	128
3 C.W. Garnet	123	123	123	123
1 Alberta Red Winter	132	132	132	132
2 Alberta Winter	127	127	127	127
3 Alberta Winter	121	121	121	121
1 C.W. Amber Durum	150	150	150	150
2 C.W. Amber Durum	146	146	146	146
3 C.W. Amber Durum	141	141	141	141
<u>International Grains Arrangement and domestic sales</u> (Basis in store Fort William-Port Arthur)				
1 Northern	188/1	186/5	184/5	183/2
2 Northern	184/5	183/1	181/1	179/6
3 Northern	174/1	172/5	170/5	168
4 Northern	168/1	163/5	158/3	152/5
5 Wheat	166/1	162/1	157/3	151/5
6 Wheat	159/1	155/1	150/3	144/5
Feed Wheat	156/1	152/1	147/3	141/5
1 C.W. Garnet	168/1	163/5	158/3	152/5
2 C.W. Garnet	167/1	162/5	157/3	151/5
3 C.W. Garnet	166/1	161/5	156/3	150/5
1 Alberta Red Winter	168/1	163/5	158/3	152/5
2 Alberta Winter	167/1	162/5	157/3	151/5
3 Alberta Winter	166/1	161/5	156/3	150/5
1 C.W. Amber Durum	209/5	209/5	209/3	209/2
2 C.W. Amber Durum	207/5	207/5	207/3	207/2
3 C.W. Amber Durum	196/6	196/6	196/4	196/3
<u>(Basis in store Vancouver)</u>				
1 Northern	197/2	193/2	186/3	184/2
2 Northern	193/6	190/3	183/7	181/6
3 Northern	185/2	181/7	175/3	173/2
4 Northern	179/2	175/7	169/3	167/2
5 Wheat	177/2	173/7	167/3	165/2
6 Wheat	170/2	166/7	160/3	158/2
Feed Wheat	167/2	163/7	157/3	155/2
1 C.W. Garnet	179/2	175/7	169/3	167/2
2 C.W. Garnet	178/2	174/7	168/3	166/2
3 C.W. Garnet	177/2	173/7	167/3	165/2
1 Alberta Red Winter	179/2	175/7	169/3	167/2
2 Alberta Winter	178/2	174/7	168/3	166/2
3 Alberta Winter	177/2	173/7	167/3	165/2

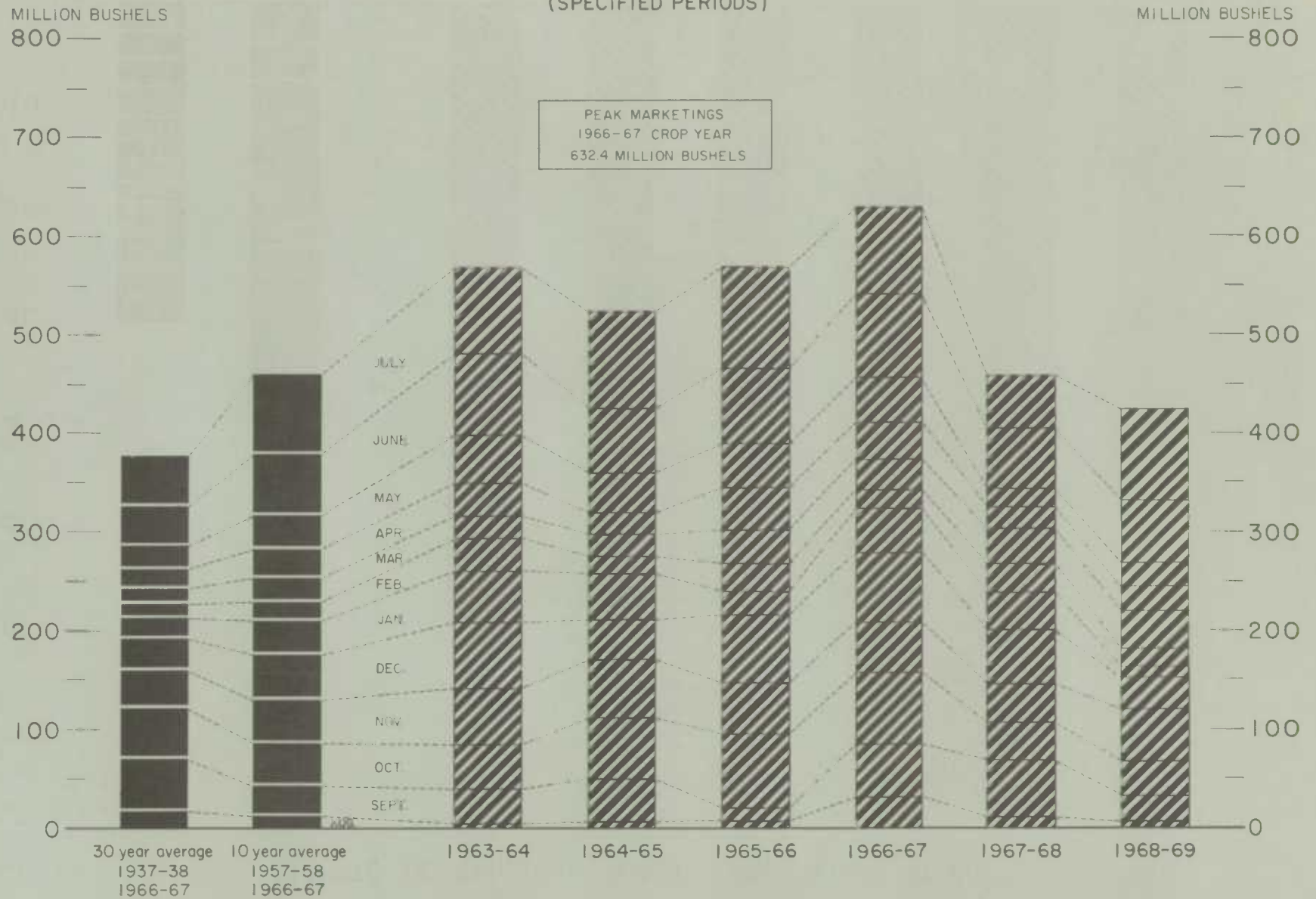
Initial Payment to Producers The Canadian Wheat Board in its Instructions to the Trade No. 9 announced the fixed minimum carlot prices for wheat basis in store Fort William-Port Arthur or Vancouver. The amount to be paid in respect of wheat of the grade No. 1 Northern was fixed by Order-in-Council P.C. 1969 - 1550 of the 31st day of July, 1969. The amount to be paid in respect of each other grade of wheat referred to in the following table was fixed by the Board and approved by Order-in-Council P.C. 1969-1563 of the 6th day of August, 1969, pursuant to the Canadian Wheat Board Act, as amended.

Canadian Wheat Board Price List for Specified Grades of Wheat, Crop Year 1969-70
(In Carload Lots, Basis in Store Fort William-Port Arthur or Vancouver)
Effective August 1, 1969

Grade	Straight	Tough	Damp
dollars per bushel			
No. 1 Hard	1.50	1.46	
No. 1 Northern	1.50	1.46	1.34
No. 2 Northern	1.46	1.42	1.30
No. 3 Northern	1.41	1.37	1.25
No. 4 Northern	1.33	1.29	1.17
No. 5 Wheat	1.19	1.15	1.03
No. 6 Wheat	1.15	1.11	1.01
Feed Wheat	1.10	1.06	.96
No. 4 Special	1.33	1.29	1.17
No. 1 C.W. Amber Durum	1.50	1.46	1.34
No. 2 C.W. Amber Durum	1.46	1.42	1.30
No. 3 C.W. Amber Durum	1.41	1.37	1.25
Extra No. 4 C.W. Amber Durum	1.41	1.37	1.25
No. 4 C.W. Amber Durum	1.33	1.29	1.17
No. 5 C.W. Amber Durum	1.19	1.15	1.03
No. 6 C.W. Amber Durum	1.15	1.11	1.01
No. 1 C.W. Garnet	1.33	1.29	1.17
No. 2 C.W. Garnet	1.28	1.24	1.12
No. 3 C.W. Garnet	1.23	1.19	1.07
No. 4 C.W. Garnet	1.17	1.13	1.01
No. 1 Alberta Red Winter	1.32	1.28	1.16
No. 2 Alberta Winter	1.27	1.23	1.11
No. 3 Alberta Winter	1.21	1.17	1.05
No. 4 Alberta Winter	1.15	1.11	.99
No. 1 Soft White Spring	1.40	1.36	1.24
No. 2 Soft White Spring	1.37	1.33	1.21
No. 3 Soft White Spring	1.33	1.29	1.17
No. 4 Soft White Spring	1.30	1.26	1.14
No. 1 Mixed Wheat	1.19	1.15	1.05
No. 2 Mixed Wheat	1.16	1.12	1.02
No. 3 Mixed Wheat	1.16	1.12	1.02
No. 4 Mixed Wheat	1.11	1.07	.97
No. 5 Mixed Wheat	1.19	1.15	1.05
No. 6 Mixed Wheat	1.16	1.12	1.02
No. 1 C.W. Mixed Grain	1.05	1.01	.91

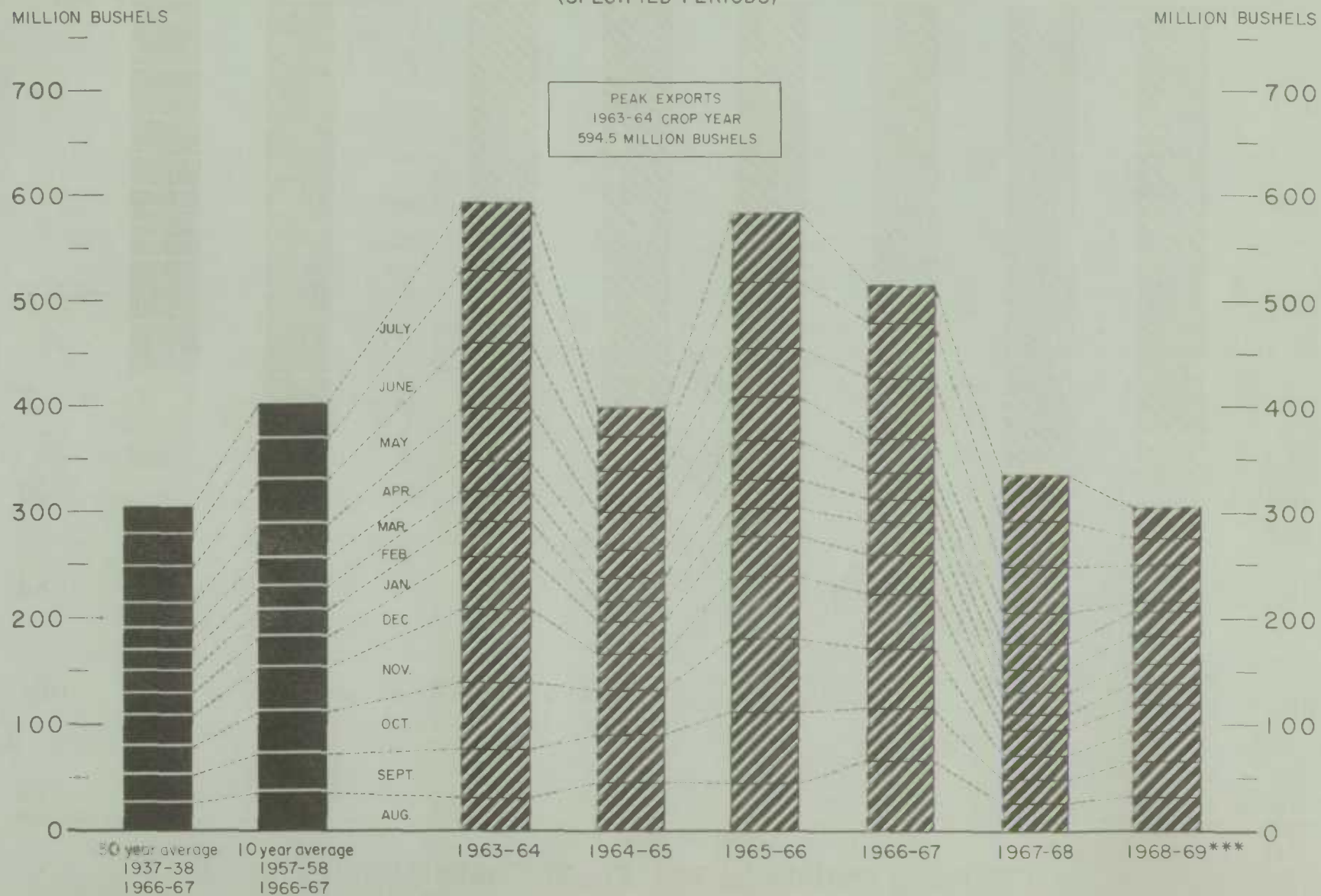
FARMERS' MARKETINGS OF WHEAT, PRAIRIE PROVINCES

(SPECIFIED PERIODS)



EXPORTS OF CANADIAN WHEAT* AND WHEAT FLOUR**

(SPECIFIED PERIODS)



* Beginning with 1955-56 includes seed wheat.

** In terms of wheat equivalent.

*** Preliminary.

Agriculture Division D.B.S.

FARMERS' MARKETINGS OF BARLEY, PRAIRIE PROVINCES

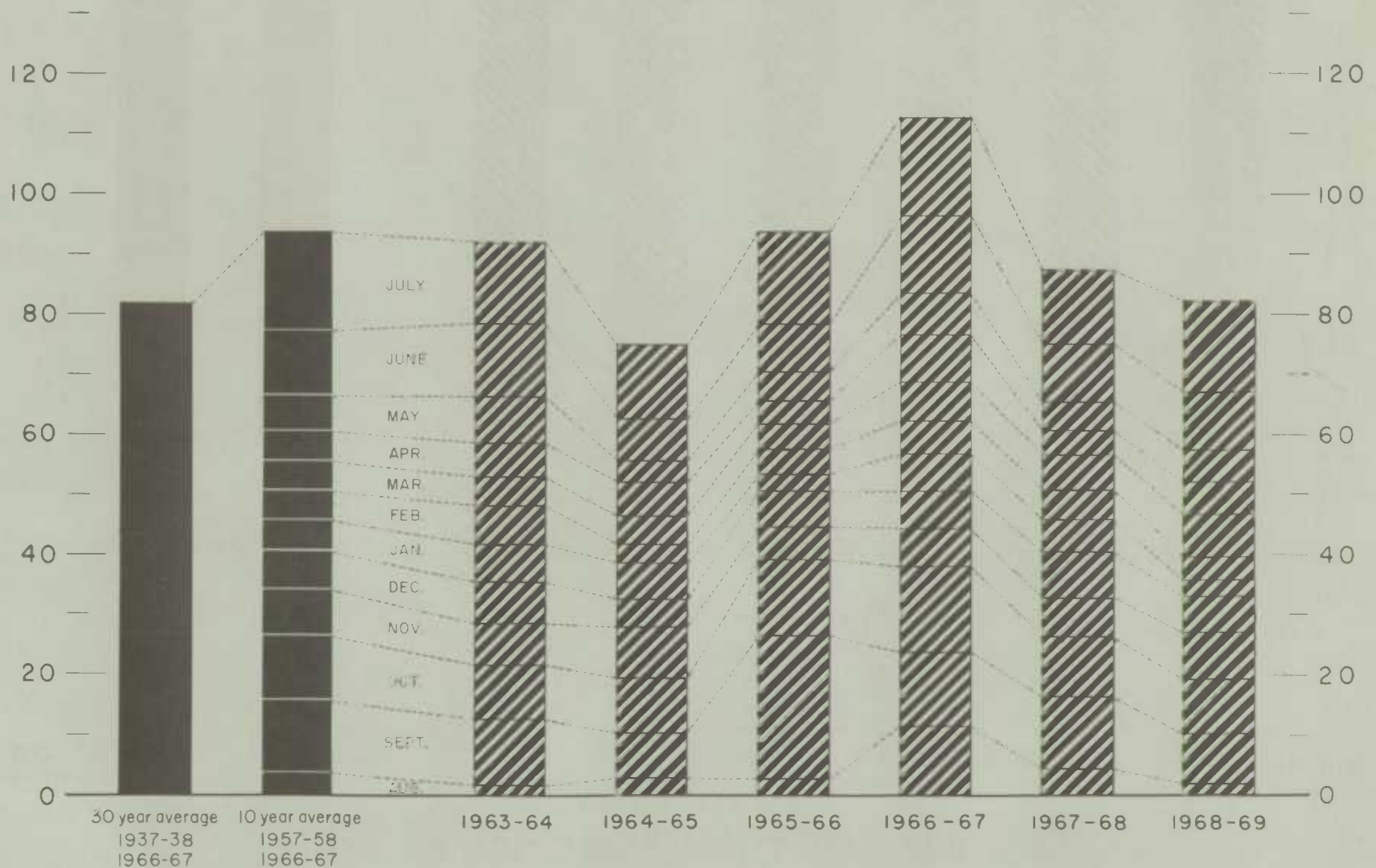
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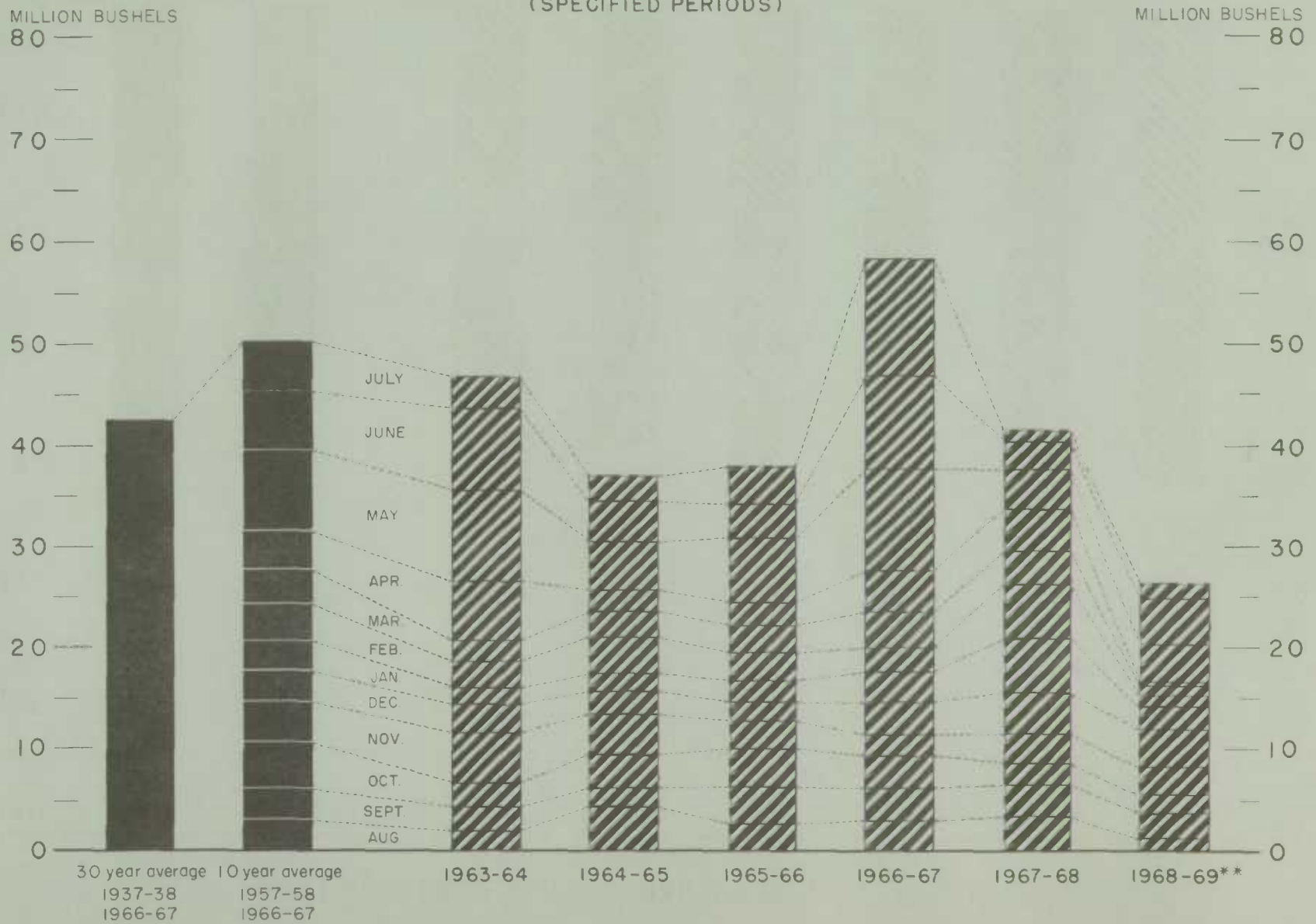
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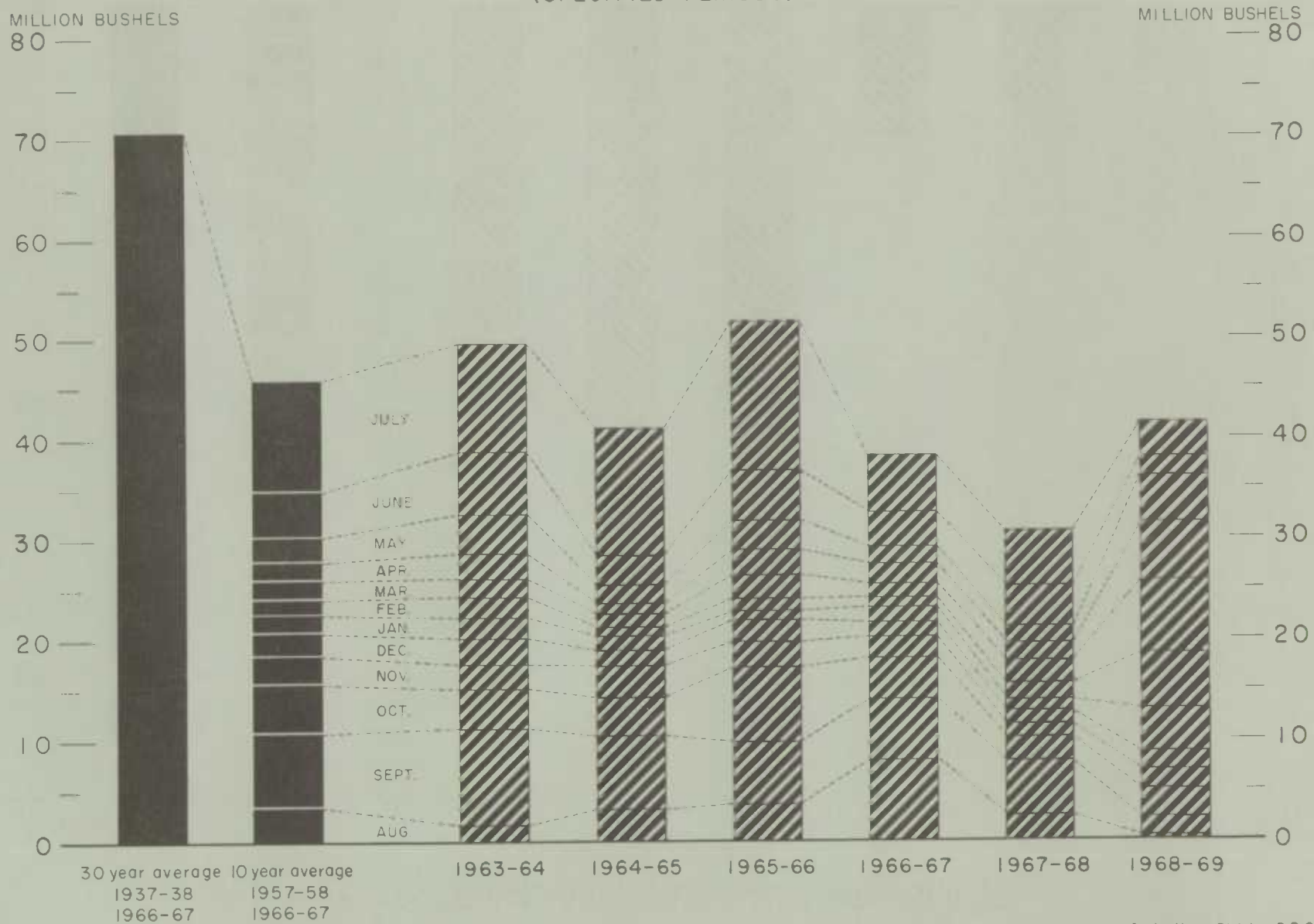


EXPORTS OF CANADIAN BARLEY AND BARLEY PRODUCTS* (SPECIFIED PERIODS)

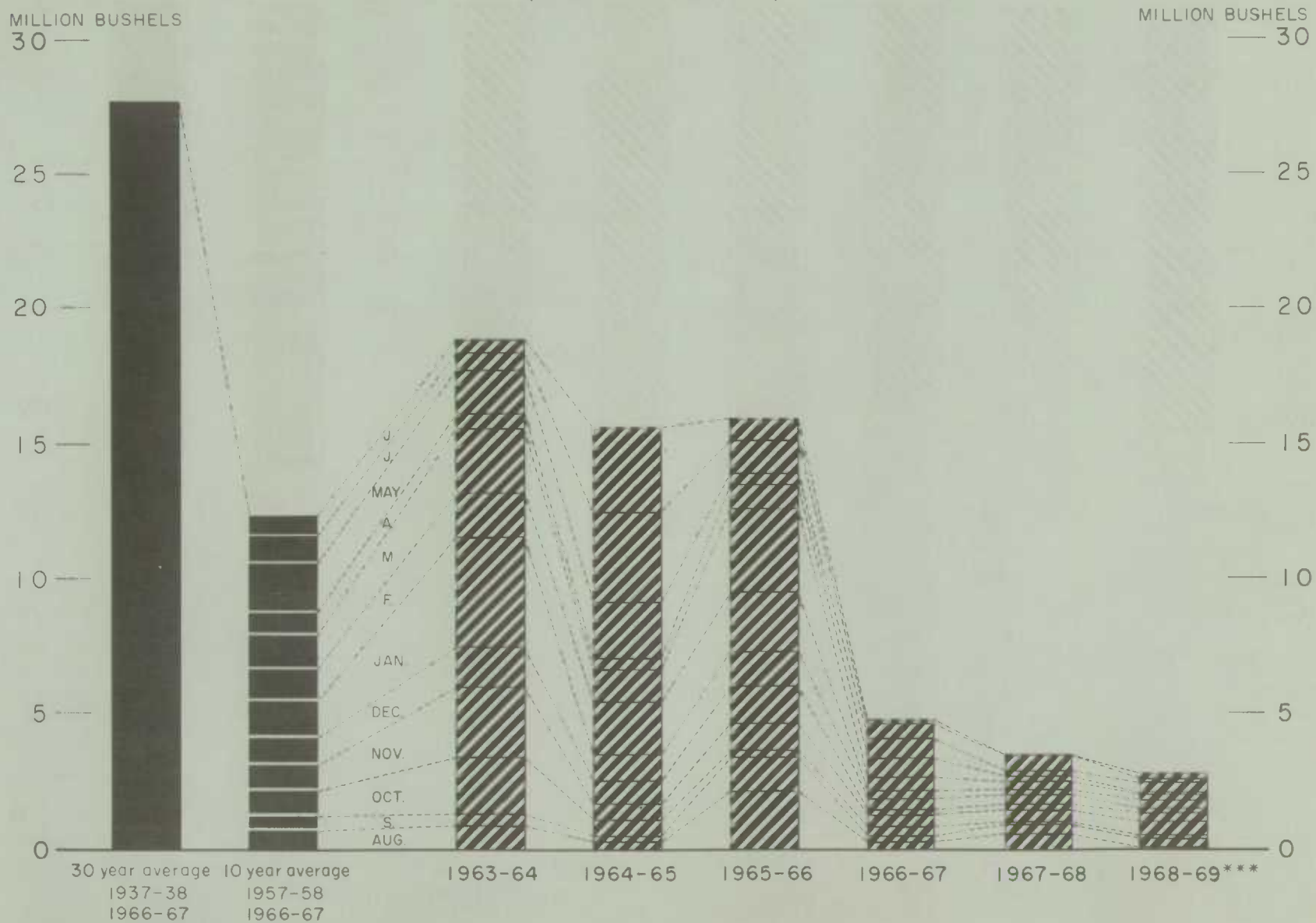


* In terms of grain equivalent. ** Preliminary.

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



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



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

** In terms of grain equivalent.

*** Preliminary.

Agriculture Division D.B.S.

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

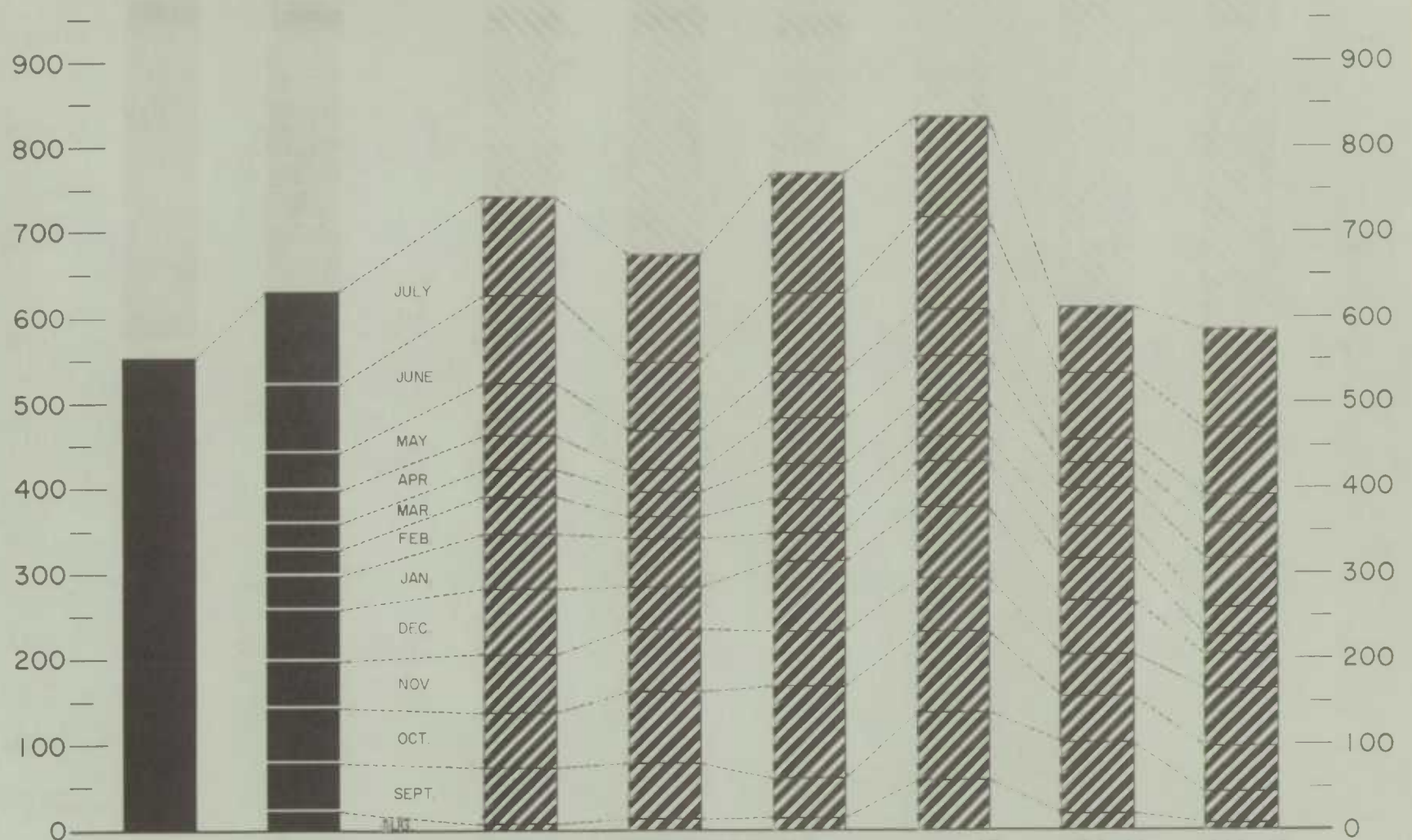
(SPECIFIED PERIODS)

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MILLION BUSHELS

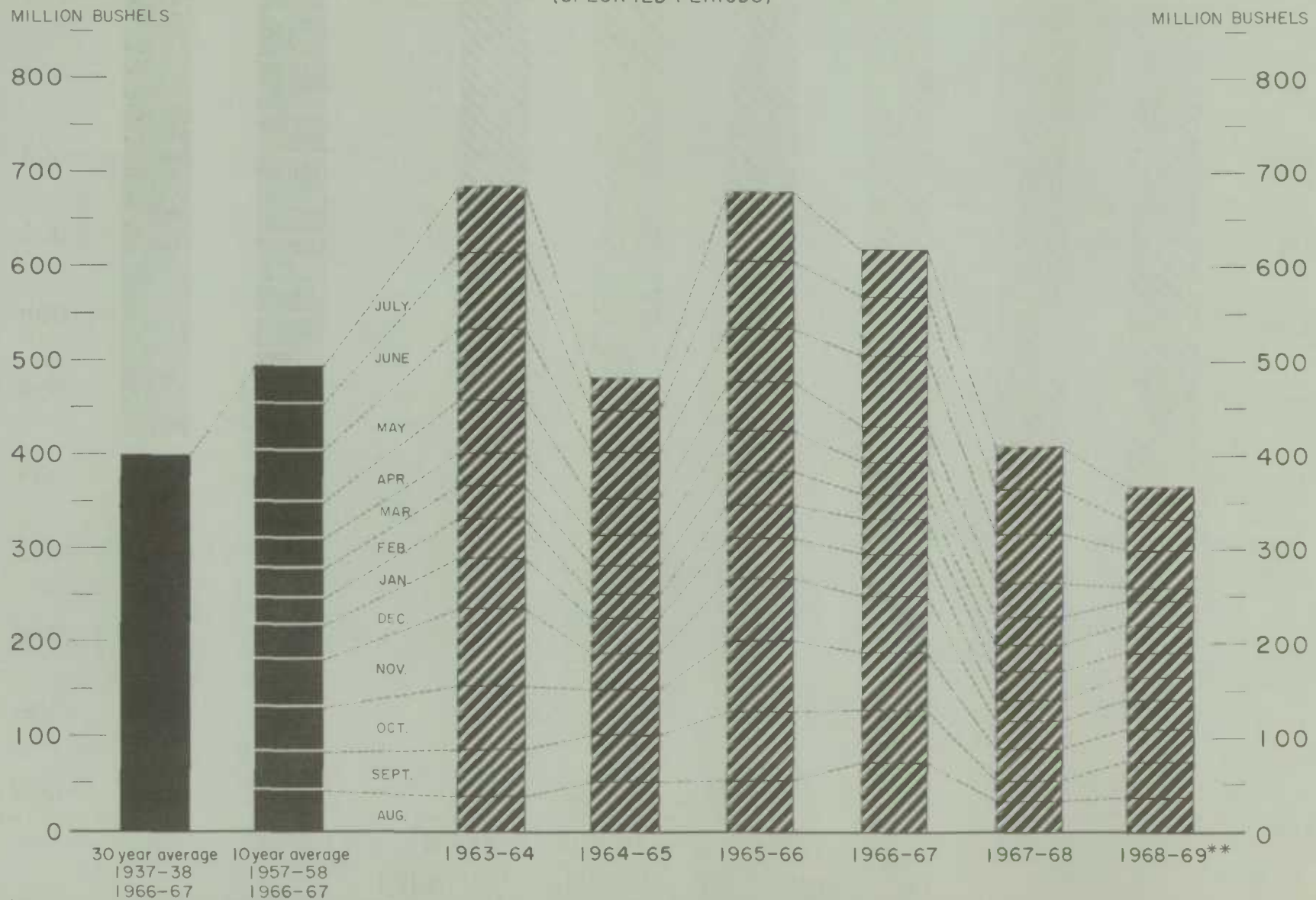
1,000 —



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

EXPORTS OF CANADA'S SIX MAJOR GRAINS AND PRODUCTS*

(SPECIFIED PERIODS)



CANADIAN FLOUR MILLING SITUATION

Production Wheat flour production by Canadian mills during July 1969 amounted to 3,127,000 hundredweight representing an increase of 8 per cent higher than the June 1969 total of 2,902,000 hundredweight, but 4 per cent less than the adjusted July 1968 figure of 3,269,000 hundredweight and 6 per cent lower than the ten-year (1959-68) average production for the month of July of 3,324,000 hundredweight. Mills reporting operations during July 1969 had a total rated capacity of 169,000 hundredweight per 24-hour day and on the basis of a 26-day working period 71.7 per cent of this rated capacity was effective.

Wheat milled for flour during July 1969 amounted to 7,085,000 bushels 8 per cent over the 6,561,000 bushels milled during the preceding month but 4 per cent less than the 7,355,000 bushels milled during July 1968. Of the wheat milled for flour some 6,004,000 bushels were Western Canadian spring wheat (other than Durum) while the remainder consisted of Ontario winter wheat (640,000 bushels); Durum (364,000 bushels); and all other (76,000 bushels).

Exports According to preliminary Customs returns, exports of Canadian wheat flour during July 1969 amounted to the equivalent of 2,864,000 bushels (some 1,245,000 hundredweight of flour) 41 per cent greater than 2,032,000 bushels exported in June 1969 and 48 per cent higher than the adjusted July 1968 exports of 1,937,000 bushels. Flour shipments during the month went to forty-two countries with exports to Cuba amounting to 2,330,000 bushels and accounted for 81 per cent of the July total. Other principal markets for Canadian wheat flour in terms of wheat during the month with shipments in thousands of bushels were as follows: Britain, 92; Ghana, 85; United States, 58; Leeward and Windward Islands, 38; and Trinidad and Tobago, 34.

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	871,747 ^r
March	6,853,974	3,036,678	1,106,040
April	6,141,137	2,720,743	543,026
May	7,464,333	3,295,084	683,397
June	6,561,097	2,901,611	883,433
July	7,084,796	3,126,705	1,245,230
Totals	85,046,076	37,621,223	10,700,520
Same months 1967-68 ^r	84,769,150	37,755,841	10,734,857

(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

Supply Position Total domestic supplies of wheat in the United States for the 1969-70 crop year are currently placed at 2,269.3 million bushels, 10 per cent more than the previous year's total of 2,109.8 million reflecting a sharp increase in carryover stocks which more than offset a slight decrease in production. The 810.6 million bushels carried over at July 1, 1969 were 50 per cent larger than the 1968 stocks, while the current crop, estimated at 1,458.7 million bushels, represents a decline of 7 per cent from last year's outturn of 1,570.4 million. In addition, current crop year domestic supplies may be supplemented by imports of about 1 million bushels. Total disappearance in 1969-70 may be somewhat higher than the 1,300 million bushels of last year with domestic use expected to rise, primarily due to increased use of wheat for feeding purposes.

Exports Below Previous Year Exports of wheat, wheat flour and other products in terms of grain equivalent during July 1969 amounted to 49.9 million bushels, 5 per cent less than the 52.8 million exported during the same month last year. The balance remaining on August 1 for export and for carryover was estimated at 1,414.5 million bushels compared with 1,300.9 million on the same date a year ago.

United States Wheat Supplies

Item	1968-69 ^r	1969-70 ^P
	million bushels	
Carryover at beginning of crop year (July 1)	539.4	810.6
Production	1,570.4	1,458.7
Total estimated domestic supplies	2,109.8	2,269.3
Imports of wheat and wheat flour in terms of wheat for domestic use, July	0.1	0.1
Total estimated supplies(1)	2,109.9	2,269.4
Less estimated domestic requirements for crop year(2) ...	756.2	805.0
Available for export and for carryover	1,353.6	1,464.4
<u>Deduct</u>		
Exports of wheat as grain, July	48.0	42.7
Exports of wheat flour in terms of wheat, July	4.7	7.2
Total exports of wheat and wheat flour	52.8	49.9
Balance on August 1 for export and for carryover	1,300.9	1,414.5

(1) Excluding imports for August - June.

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

P Preliminary figures.

r Revised figures.

1969 Wheat Crop
Estimated at 1,459
Million Bushels

In a report released on August 11, 1969 the Crop Reporting Board of the United States Department of Agriculture stated that production of all wheat was indicated at 1,459 million bushels, 2 per cent more than a month ago, 7 per cent less than the record high 1968 output and 4 per cent less than in 1967. Deviation of the August 1 estimate from final production over the past decade has averaged 20 million bushels, ranging from 1 to 60 million bushels. Yield per acre of all wheat averaged 30.7 bushels, a record high and 2.3 bushels above the 1968 average. Grain is expected to be harvested from 47.5 million acres, 14 per cent less than the 1968 acreage.

Winter wheat production is now estimated at 1,148 million bushels, 7 per cent below the 1968 crop and 5 per cent below the 1967 output, and nearly 5 million bushels below a month earlier. Reductions from July 1 in Colorado, South Dakota, Nebraska, Missouri, and the eastern Corn Belt States more than offset higher estimates in Kansas, Arkansas, and several western States. July weather was unfavourable for harvest in most areas and was responsible for the reduced outlook. The U.S. yield per acre is indicated at a record 31.4 bushels compared with 28.9 last year, the previous high.

July rains delayed harvest in the Central Plains. The Kansas harvest, virtually completed by July 21, was later than usual but ahead of the very late 1967 harvest. Kansas had a record high yield of 31.5 bushels per acre, easily beating the previous high of 28.5 bushels attained in 1958 and 1960. By August 1, the Nebraska harvest was winding up. In South Dakota, 80 per cent of the crop was harvested compared to the average of 95. Colorado harvest was 85 per cent completed-about a week behind last year.

Harvest was behind normal progress in Missouri and the eastern Corn Belt because of above normal rainfall. About 90-95 per cent of the crop was combined by August 1 in Missouri, Indiana, and Ohio while harvest was virtually completed in Illinois. Yields in this area were below earlier expectations.

Prospects in Idaho and Oregon increased during July and remained steady in Washington. Near normal temperatures and little rainfall provided excellent harvest conditions during the month. However, harvest is behind usual because of a late spring and the absence of hot July temperatures. In Oregon, harvest started the first part of July at lower elevations but has been limited at high elevations because of green spots due to rains and last spring's late melting snowpack. In Idaho, harvest was well under way in earlier harvesting areas. June rains benefitted the crop much more than expected earlier. The Montana crop maintained earlier prospects and harvest was getting underway around August 1.

Durum wheat production is forecast at a record 104.2 million bushels, up 7 per cent from last year's crop of 97.7 million, and up 18 per cent from last month as a result of favourable weather conditions. Prospective yield of 31.2 bushels is 4.7 bushels more than last year.

Generally, adequate precipitation and cool temperatures aided filling of the grain but maturity of the crop is somewhat behind normal. The prospective North Dakota yield is up sharply from July 1 with a record high yield and production expected. Harvest has started in South Dakota.

Spring wheat, other than durum, is estimated at 206.7 million bushels, up 12 per cent from July 1 but 15 per cent below the 1968 crop. The indicated yield of 27.2 bushels per acre is a record high, 0.8 bushel above last year and 3.7 bushels above 1967.

Soil moisture was mostly adequate and cool temperatures prevailed in the major growing areas. These conditions aided filling of the grain but delayed maturity. Condition of the crop in North Dakota improved considerably from last month as a result of timely rains. The North Dakota crop is mostly in the milk to dough stage and about half the Montana acreage has turned colour. Harvest has started in South Dakota. Part of the crop in Washington was damaged by hot temperatures and wind during June.

U.S. Wheat and Flour Exports Drop During 1968-69 Wheat and flour exports at 540 million bushels during 1968-69 were 27.3 per cent or 202 million less than in the previous fiscal year. While wheat was down 212 million bushels, flour shipments were up by about one-fifth to 61 million (wheat equivalent). Other wheat products were also up by 3.2 per cent.

The bulk of the decline in wheat exports can be attributed to decreased PL 480 shipments to India and Pakistan, down 121 and 58 million bushels, respectively. Sizeable decreases were also registered to Brazil (-19 million), Japan (-14 million), and Morocco (-14 million bushels). Together, these five countries more than accounted for the entire decline in U.S. exports of wheat and flour.

The reductions were mainly due to record production in India, Pakistan, and Morocco and near-record production plus increased inroads by competitors and the effects of the dock strike for Brazil. Japanese takings were down primarily because of problems last fall with sprout damaged wheat and the disruption of normal supply channels by the prolonged U.S. dock strike.

United States Exports of Wheat and Flour(1) by Country of Destination,
July-June 1967-68 and 1968-69

Country of destination	July-June 1967-68			July-June 1968-69		
	Wheat	Flour(2)	Total	Wheat	Flour(2)	Total
thousand bushels						
Western Hemisphere						
Canada	(3)	17	17	(3)	29	29
Mexico	33	7	40	94	7	101
Costa Rica	1,946	60	2,006	2,570	42	2,612
El Salvador	1,783	115	1,898	2,461	63	2,524
Guatemala	2,323	245	2,568	2,011	173	2,184
Other Central America	3,376	636	4,012	3,546	421	3,967
Dominican Republic	3,242	74	3,316	2,865	168	3,033
Haiti	906	161	1,067	—	974	974
Jamaica	175	1,010	1,185	496	621	1,117
Trinidad and Tobago	2,650	1	2,651	2,396	3	2,399
Other Bermuda and Caribbean	—	720	720	63	681	744
Bolivia	451	4,320	4,771	493	2,450	2,943
Brazil	47,489	614	48,103	28,723	956	29,679
Chile	4,393	662	5,055	3,416	684	4,100
Colombia	4,690	442	5,132	7,873	534	8,407
Ecuador	1,990	139	2,129	2,180	127	2,307
Guyana	—	992	992	310	814	1,124
Peru	9,079	460	9,539	3,778	356	4,134
Surinam	214	331	545	337	269	606
Uruguay	3,695	6	3,701	3,698	7	3,705
Venezuela	21,852	61	21,913	24,140	15	24,155
Other South America	1,363	38	1,401	1	56	57
Totals	111,650	11,111	122,761	91,451	9,450	100,901

United States Exports of Wheat and Flour(1) by Country of Destination,
July-June 1967-68 and 1968-69

Country of destination	July-June 1967-68			July-June 1968-69		
	Wheat	Flour(2)	Total	Wheat	Flour(2)	Total
thousand bushels						
<u>Western Europe</u>						
EEC:						
Belgium and Luxembourg	5,728	3	5,731	7,390	4	7,394
France	9,631	3	9,634	12,008	—	12,008
Germany, West	12,839	2	12,841	11,878	5	11,883
Italy	7,615	11	7,626	16,513	14	16,527
Netherlands	20,115	490	20,605	22,332	505	22,837
Totals	55,928	509	56,437	70,121	528	70,649
<u>Other Western Europe</u>						
Iceland	—	337	337	9	373	382
Ireland	369	—	369	81	1	82
Norway	2,617	6	2,623	645	7	652
Portugal	—	465	465	426	234	660
Switzerland	2,697	(4)	2,697	5,498	(4)	5,498
United Kingdom	10,407	87	10,494	4,485	41	4,526
Others	955	98	1,053	619	160	779
Totals	17,045	993	18,038	11,763	816	12,579
<u>Eastern Europe</u>						
Poland	858	649	1,507	—	518	518
Yugoslavia	10,422	45	10,467	—	2	2
Totals	11,280	694	11,974	—	520	520
Totals Europe	84,253	2,196	86,449	81,884	1,864	83,748
<u>Asia</u>						
Ceylon	—	5,382	5,382	—	10,988	10,988
Hong Kong	1,030	198	1,228	967	206	1,173
India	206,130	650	206,780	85,099	21	85,120
Indonesia	—	87	87	71	7,393	7,464
Israel	8,354	2,878	11,232	10,211	2,538	12,749
Japan	81,715	48	81,763	67,365	209	67,574
Jordan	258	1,021	1,279	1,436	2,079	3,515
Korea, Republic of	30,249	4,815	35,064	48,145	7,134	55,279
Lebanon	2,351	2,349	4,700	1,383	1,647	3,030
Nansei and Nanpo Islands .	1,434	480	1,914	1,263	344	1,607
Pakistan	76,387	8	76,395	18,555	14	18,569
Philippines	21,919	571	22,490	18,355	502	18,857
Republic of China (Taiwan)	19,173	216	19,389	13,619	—	13,619
Saudi Arabia	698	4,872	5,570	28	3,720	3,748
Turkey	785	631	1,416	12,179	626	12,805
Vietnam, South	—	5,654	5,654	—	6,097	6,097
Others	4,648	825	5,473	1,189	676	1,865
Totals	455,131	30,685	485,816	279,865	44,194	324,059

United States Exports of Wheat and Flour(1) by Country of Destination,
July-June 1967-68 and 1968-69

Country of Destination	July-June 1967-68			July-June 1968-69		
	Wheat	Flour(2)	Total	Wheat	Flour(2)	Total
thousand bushels						
<u>Africa</u>						
Algeria	10,374	—	10,374	9,627	—	9,627
Congo (Kinshasa)	2	2,423	2,425	—	1,560	1,560
Ghana	—	865	865	—	42	42
Morocco	16,119	1,540	17,659	2,526	1,735	4,261
Nigeria	3,037	13	3,050	5,324	197	5,521
Tunisia	8,188	1,042	9,230	7,531	458	7,989
United Arab Republic	864	34	898	—	—	—
Others	1,310	1,206	2,516	1,138	946	2,084
Totals	39,894	7,123	47,017	26,146	4,938	31,084
<u>Oceania</u>	—	113	113	—	100	100
World totals	690,928	51,228	742,156	479,346	60,546	539,892
Other products(5)	11,614	—	11,614	11,956	—	11,956
Totals, all countries ...	702,542	51,228	753,770	491,302	60,546	551,848

(1) Data includes shipments for relief.

(2) Grain equivalent.

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

(4) Less than 500 bushels.

(5) Includes bulgur wheat (relief and other), rolled wheat for relief, semolina, macaroni and spaghetti products. Foreign Agricultural Service. Compiled from reports of the U.S. Department of Commerce.

Flour Production

According to the Bureau of the Census, United States Department of Commerce, wheat flour production in the United States in July 1969 amounted to 19,817,000 hundredweight, averaging 901,000 hundredweight per working day. This compared with an average output per working day of 988,000 hundredweight last month and 928,000 hundredweight in July 1968. Wheat flour mills during July operated at 89.5 per cent of capacity, compared with 98.2 per cent and 91.9 per cent, respectively, for the previous month and the same month a year ago. Flour mills in July 1969 ground 44,631,000 bushels of wheat compared with 46,457,000 bushels the previous month and 45,852,000 bushels in July 1968.

Cash Wheat Prices on the Kansas City and Minneapolis Markets

No. 2 Hard Winter, Kansas City			No. 1 Northern Spring, Minneapolis(1)		
Date	Price		Date	Price	
	cents per bushel			cents per bushel	
August 1, 1969	130 1/2	— 150	August 1, 1969	150	— 205
4	128 1/2	— 160 1/2	4	148 3/8	— 203 3/8
5	128	— 173 3/4	5	147 3/4	— 202 3/4
6	128 1/2	— 141 1/4	6	147 7/8	— 200 7/8
7	128 1/4	— 147 1/4	7	148 1/8	— 203 1/8
8	134	— 158 1/2	8	147 7/8	— 200 7/8
11	130 3/4	— 149 3/4	11	147 1/8	— 198 1/8
12	129 1/2	— 149 1/4	12	146 1/2	— 194 1/2
13	N.A.		13	146 3/4	— 194 3/4
14	128	— 178(2)	14	149	— 197
15	133 1/4	— 153	15	150 1/2	— 195 1/2
18	137		18	151 1/8	— 193 1/8
19	131 3/4	— 167 3/4	19	151 1/8	— 193 1/8
20	132	— 172(2)	20	151	— 193
21	132	— 143 1/2	21	151 7/8	— 193 7/8
22	130 1/2	— 172 3/4(2)	22	152	— 194
25	133 1/4	— 160 3/4	25	152 5/8	— 194 5/8
26	133 1/2	— 168	26	152 3/8	— 194 3/8
27	153 3/4	— 163 1/4	27	153 1/8	— 195 1/8
28	134	— 173 3/4	28	153 5/8	— 195 5/8
29	145 3/4	— 155	29	154 5/8	— 196 5/8

(1) 11 to 17 per cent protein.

(2) Nominal.

N.A. Not available.

Chicago Wheat Futures, High Points of Closing

Date	September	December	March	May	July
	cents and eighths per bushel				
August 1, 1969	123/7	129	132/6	133/6	132/1
4	123	128	131/6	132/6	130/6
5	122/2	127/4	131/3	132/4	130/5
6	122/6	127/6	131/6	133	131/6
7	124	129/1	133/1	134	132/5
8	124/6	130	133/6	134/7	133/4
11	125/2	130/6	134/2	135/2	134
12	125/6	130/6	134/4	135/4	134/3
13	124/5	129/7	133/7	135/1	133/7
14	123/6	131	134/7	136/1	134/3
15	126/4	131/6	135/6	136/7	134/7
18	127	132	136	137	134/4
19	125/4	130/6	134/5	135/6	133/4
20	125/6	131	135	136	133/3
21	125/6	131/2	135/1	136/1	133/4
22	126	131/6	135/3	136/3	133/7
25	126/7	132/5	136/1	136/6	134/3
26	125/6	131/4	135	135/7	133/4
27	126/2	132/2	135/6	136/1	134
28	127/4	133/2	136/6	137	135
29	128/2	133/6	136/7	136/7	135

AUSTRALIAN SITUATION

Wheat Supplies at Record Level Total estimated supplies of wheat in Australia for the 1968-69 (December-November) crop year are placed at an all-time high of 591.4 million bushels, as against 357.8 million in 1967-68, reflecting the effect of a sharp increase in production, which more than offset a substantial decrease in carryover stocks. The 1968 production at 539.6 million bushels, exceeded by a wide margin the 277.4 million bushels harvested in 1967-68, while carryover stocks, at December 1, 1968, at 51.8 million bushels, declined sharply from the 80.4 million at the same time a year ago. After deducting some 86.0 million bushels for anticipated domestic requirements, an estimated 505.4 million are available for export and for carryover during 1968-69, considerably above the 257.3 million in 1967-68.

Exports Below Previous Year Combined exports of wheat as grain and wheat flour in terms of grain equivalent during the period December 1 - July 26 of the current Australian crop year amounted to 147.8 million bushels, 5 per cent less than the 141.0 million exported during the corresponding eight months of the 1967-68 crop year. The balance remaining on July 27, 1969 for export and for carryover, at 357.6 million bushels, was in sharp contrast to the 116.3 million at the same date a year ago.

Australian Wheat Supplies

Item	1967-68 ^r	1968-69 ^P
	million bushels	
Carryover, including flour as wheat, at beginning of crop year (December 1)	80.4	51.8
Production	277.4	539.6
Total estimated domestic supplies	357.8	591.4
Less estimated domestic requirements for crop year ...	100.5	86.0 ^r
Available for export and for carryover	257.3	505.4
<u>Deduct</u>		
Exports of wheat as grain, December 1 - July 26	128.3	136.6
Exports of wheat flour in terms of wheat, December 1 - July 26	12.7	11.2
Total exports of wheat and wheat flour	141.0	147.8
Balance on July 27 for export and for carryover	116.3	357.6

^P Preliminary figures.

^r Revised figures.

The following information relative to the Australian situation has been extracted from a report from Mr. F. P. Weiser, Commercial Counsellor for Canada, Canberra, under date of August 18, 1969 and is reproduced with the permission of the Trade Commissioner Service, Department of Industry, Trade and Commerce.

Domestic wheat sales outside AWB framework. — Expectations continue that the new crop will be considerably larger than the new delivery quotas and accordingly much wheat will have to be retained on farms where there are insufficient storage facilities for it. Against this background press speculation is mounting that sales are already now being made for domestic consumption at well below the official domestic price and outside the framework of the Wheat Board.

This speculation is boosted by the legal situation. Section 92 of the Constitution requires that trade between Australian States must be absolutely free. Against this, it is illegal under the Wheat Stabilization Act to sell wheat to others than the Wheat Board.

Both the Right Honourable John McEwen, Minister for Trade and Industry, and Dr. Allan Callaghan, Chairman of the Australian Wheat Board, admitted publicly that the Constitution takes precedence over the Wheat Stabilization Act. Mr. McEwen also warned against action that could destroy orderly wheat marketing. Dr. Callaghan announced on August 14 that it was decided at a joint meeting of the AWB and the Australian Wheatgrowers' Federation that the domestic price of \$1.71 per bushel should be maintained. The Board will take steps to control illegal trading in wheat. Dr. Callaghan did not outline what these steps will be but they are expected to involve a tightening of Board administration in concert with the Federal and State organizations controlling the quota delivery scheme.

We cannot judge at this time the extent of sales outside the AWB framework which have been made but top level Primary Industry Department Officials confirmed to us that private cash sales have been made to biscuit manufacturers. Farmers have been willing to make cash sales for less money in order to overcome storage problems and avoid waiting for payment. We were also told by these officials that studies are being made regarding the possible use of wheat for specific feeding purposes including poultry and pig raising. The latter could offer interesting possibilities since the quality of pigmeat in Australia tends to suffer from the pigs feeding on whatever they find in pastures.

Another large wheat crop expected in 1969-70. — The area planted to wheat for grain in Australia in 1969-70 is expected to be around 25.6 million acres compared with the 1968-69 record of 26.6 million. It would appear that the introduction of a system of quota deliveries of wheat to the Australian Wheat Board to operate from the 1969-70 season had little effect on farmers' planting intentions. Provided good weather conditions are enjoyed during the growing and harvesting period a crop of some 520 million bushels can be expected. This would be the second-highest crop ever harvested; production in 1968-69 reached a peak of 539.6 million bushels, 16 per cent above the previous record of 466.6 million in 1966-67.

Above average rainfall in the period from March to May 1969 in New South Wales delayed wheat sowings and cultivation in those areas of the wheat belt where heavy soils predominate, particularly in the southern part of the State. Below-normal rains were received in July but some areas were still so wet that planting operations had to be postponed further. Nevertheless, by the second week in July between 80 and 90 per cent of planned sowings had been completed and seeding was continuing. Early indications were that an area at least equal to that of 1968-69 (an estimated 10 million acres) would be sown but wet conditions in the central and southern sections of the State, which caused waterlogging of some early-sown crops, could lead to a significant reduction in the acreage finally planted. There was evidence, also, that some land which had been prepared for wheat would be sown instead to barley or summer crops. Nevertheless, provided no further heavy rains are experienced during

the remainder of the season, the 1969-70 crop is expected to be around 235 million bushels, some 25 million bushels more than the 1968-69 record. An average yield per acre of 21 bushels was obtained in 1968-69. The harvest in 1966-67 was 202.5 million bushels, the planted area of only 7.1 million acres yielding a record 28.4 bushels to the acre.

In Victoria the weather in April and May 1969 was generally dry. This provided excellent conditions for sowing in the northern and north-eastern districts where good rains had fallen earlier in the autumn. In most other districts drier autumn conditions had prevailed and seeding was mainly confined to parts of the northern Mallee and the more difficult soil type areas of the northern and eastern Wimmera. Frosts during June tended to retard growth but caused little damage. The dry spell persisted during June but moderate general rains were received throughout the wheat belt early in July. These were followed by showery conditions, interspersed with heavier falls, which provided sufficient soil moisture to maintain growth during the month and enabled crops in the western Wimmera sown during the dry period to germinate and emerge. By the end of June it was reported that 80 per cent of the crop was in better-than-average condition and the remaining 20 per cent in average to slightly below-average condition. The area sown to wheat for grain is estimated at 3.4 million acres, 11 per cent less than the 1968-69 area of 3.8 million acres. With normal weather during the balance of the season, a crop of around 80 million bushels is expected compared with the 1968-69 peak of 90 million bushels. If expectations for the 1969-70 crop are realised, the average yield per acre will be 23.5 bushels as against 23.7 bushels in 1968-69 and the 1960-61 record of 25.3 bushels.

Rainfall in Western Australia was below average during the 1969-70 planting season but by June it was estimated that the area sown would approximate the 7.2 million acres of 1968-69. Output in 1969-70 is forecast at about 90 million bushels, 22.5 million bushels less than in 1968-69 and the smallest crop since 1964-65. The average yield per acre in 1968-69 was 15.6 bushels, 1 bushel below the 1965-66 peak of 16.6 bushels.

Plantings of wheat for grain in South Australia in 1969-70 are estimated at 3.5 million acres as against 3.8 million acres in the previous season. If average rainfall is received during the growing period, a crop of around 75 million bushels can be anticipated. This would be the State's second largest harvest ever recorded. Production in 1968-69 reached 84.6 million bushels at an average yield of 22.4 bushels per acre.

Drought conditions persisted in Queensland, particularly in the central districts of the State. It was estimated that farmers intended to plant a record 1.9 million acres to wheat for the 1969-70 crop but unless adequate rains are received the area eventually sown may be significantly below intentions. By the end of May 1969 only about 1 million acres had been seeded; virtually no wheat had been planted in the central Queensland Highlands and the Dawson-Callide districts and only a small proportion of the intended acreage had been sown in the area around Dalby and on the north Downs. Planting was well advanced by June 1969 on the western and south-western Darling Downs, where the largest increases in sowings are expected, but growing conditions on the Downs were reported to be generally only fair. A harvest of about 35 million bushels is possible in 1969-70. Production in 1968-69 reached a peak of 42 million bushels from an area of 1.8 million acres. An average yield per acre of 23.3 bushels was obtained in 1968-69; this was well below the 1966-67 record of 29.1 bushels but a decided improvement on the 18.6 bushels per acre achieved in the drought year of 1967-68.

Exports of Australian Wheat and Wheat Flour in Terms of Wheat
December 1 - July 26, 1968-69 and Corresponding Period 1967-68

Destination	Wheat		Wheat flour	
	1967-68	1968-69	1967-68	1968-69
thousand bushels				
<u>Western Europe</u>				
EEC:				
Belgium	126	—	—	—
Germany, Federal Republic	72	1,453	—	—
Netherlands and I/T	2,394	6,106	—	—
Sub-totals	2,592	7,559	—	—
<u>Other Western Europe</u>				
Britain	14,501	21,089	288	254
Ireland	1,075	544	—	—
Malta	737	561	—	—
Norway	1,355	3,611	—	—
Sweden	—	52	—	—
Switzerland	10	212	—	—
Sub-totals	17,678	26,069	288	254
Totals	20,270	33,628	288	254
<u>Africa</u>				
Malawi	—	—	202	266
Mauritius	—	—	370	507
Mozambique	421	—	—	—
Rhodesia	2,527	1,576	—	—
Sudan	422	—	—	—
Zambia	1,353	1,516	104	—
Others	9	8	85	282
Totals	4,732	3,100	761	1,055
<u>Asia</u>				
Aden	600	386	—	—
Aden and Aden I/T	—	—	183	137
Aden and Aden I/T Atta	—	—	117	58
Afghanistan	—	367	—	—
Arabian Gulf	—	—	36	131
Arabian Gulf Atta	—	—	412	509
Ceylon	4	938	5,355	4,146
China	46,172	34,433	—	—
Hong Kong	3,211	1,423	37	24
India	7,550	1,130	—	—
Indonesia	—	—	2,479	1,433
Iraq	2,769	—	—	—
Japan	17,006	32,799	—	—
Korea South	—	369	—	—
Kuwait	1,540	1,506	—	—

Exports of Australian Wheat and Wheat Flour in Terms of Wheat
December 1 — July 26, 1968-69 and Corresponding Period 1967-68

Destination	Wheat		Wheat flour	
	1967-68	1968-69	1967-68	1968-69
	thousand bushels			
<u>Asia — Concluded</u>				
Lebanon	861	3,685	—	—
Malaysia	7,377	5,500	—	—
Pakistan	—	868	—	—
Philippines	306	655	80	108
Sabah	—	—	15	18
Sarawak	—	—	18	11
Saudi Arabia	38	1,089	178	491
Singapore	7,317	2,370	1	1
Taiwan	771	1,450	—	—
Thailand	932	1,167	166	145
Others	294	458	81	104
Totals	96,748	90,593	9,158	7,316
<u>Oceania</u>				
New Zealand	1,101	—	—	—
<u>Western Hemisphere</u>				
Chile	3,353	2,713	—	—
Colombia	—	1,293	—	—
Peru	2,045	5,233	—	—
West Indies Area	—	—	342	157
Totals.....	5,398	9,239	342	157
<u>Pacific Area and Sundries</u>				
Pacific Islands	53	39	2,062	2,317
Ships' Stores and Sundries	—	—	91	101
Totals	53	39	2,153	2,418
Totals, all countries	128,300	136,600	12,700	11,200

ARGENTINE SITUATION

Supplies Down
from a Year Ago

Total estimated supplies of wheat in Argentina for the 1968-69 (December — November) crop year are placed at some 267.6 million bushels some 7 per cent less than the previous season's total of 286.6 million. Current crop year supplies consist of the December 1 carryover of 44.4 million compared with 16.4 million the year before and imports of 6.4 million this year, while the 1968 production, at 216.8 million, was below the 269.0 million harvested in 1967. After making an allowance of 150.6 million for anticipated domestic requirements, an estimated 117.0 million are available for export and for carryover in 1968-69, a decrease of 8 per cent from the 127.5 million of the previous year.

Exports above Preliminary exports of wheat and wheat flour in terms of wheat
Previous Year equivalent during December 1968 - July 1969 amounted to 71.4 million bushels, in contrast to the 64.8 million exported during the same eight months in 1967-68. The balance remaining on August 1, 1969 for export and for carryover was estimated at 45.6 million bushels, 27 per cent less than the August 1, 1968 figure of 62.7 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
Imports	1.3	6.4
Total estimated supplies	286.6	267.6
Less estimated requirements for crop year	159.1 ^r	150.6
Available for export and for carryover	127.5	117.0
<u>Deduct</u>		
Exports of wheat as grain, December - July	63.8	69.3
Exports of wheat flour in terms of wheat, December - July	1.0	2.1
Total exports of wheat and wheat flour	64.8	71.4
Balance on August 1 for export and for carryover	62.7	45.6

(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 August 19, 1969 and is reproduced with the permission of the Trade Commissioner Service, Department of Industry, Trade and Commerce. Where possible conversions to Canadian measures and currency have been made for the convenience of our readers.

Area sown to wheat. - The Secretariat of Agriculture and Livestock has issued the first official estimate of the area sown to wheat in 1969-70 of 6,270,000 hectares (15.5 million acres). This is 6 per cent less than the 1968-69 sowings, and one per cent and 10 per cent less than the averages of the last five- and ten-year periods, respectively.

The smaller area seeded to wheat is attributed to the intense rains which caused flooding in some sectors of Buenos Aires province, particularly in the south, and to a lack of soil moisture in some sectors of the north of Cordoba, the centre and east of Santa Fe and in the Chaco. As a result, planting often took place under difficult circumstances and in many areas of a later date than is desirable to ensure the best possible crop. In addition, for economic reasons, wheat is tending to be replaced

by corn and sunflowerseed in the northern zone of Buenos Aires and by flaxseed in the southern zone.

The areas sown to wheat in 1968-69 and 1969-70, by province, are as follows:

	<u>1968-69</u>	<u>1969-70</u>
	thousand acres	
Buenos Aires	8,946	8,398
La Pampa	2,018	2,075
Cordoba	2,253	2,062
Santa Fe	1,830	1,655
Entre Rios	1,066	939
Other provinces	386	358
Totals	16,498	15,487

These estimates were made before the seeding of wheat, particularly of the Durum variety, had been completed and are, therefore, subject to revision.

There has not yet been a separate estimate of how much of this area has been sown to Durums. Durums can be planted until mid-September and so will be planted in many areas that could not be sown to bread wheat in time. In addition, the marketing outlook is much more favourable for Durums than for bread wheat. An increase in the Durum area of about 20 per cent to perhaps 500,000 hectares (1.2 million acres) can, therefore, be expected.

The wheat that has been sown is generally developing well although there have been reports of "pulgon verde" or green aphid plagues in some areas. These outbreaks are not yet a serious problem.

Hard bread wheat prices have been very stable during July at 1,740 pesos per 100 kilos (\$1.46 per bushel) f.o.r. Buenos Aires. At Bahia Blanca, hard bread wheat prices fluctuated within very narrow limits and closed at 1,730 pesos (\$1.45 per bushel). At August 18, prices were 1,790 pesos per 100 kilos (\$1.50 per bushel) at Buenos Aires and 1,730 pesos (\$1.45 per bushel) at Bahia Blanca.

Prices on the Buenos Aires Futures Exchange were also stable. At August 18, the quotations were 1,795 pesos per 100 kilos (\$1.51 per bushel) for September delivery; 1,800 pesos (\$1.51 per bushel) for October and 1,665 pesos (\$1.40 per bushel) for January.

Candear (Durum) prices were stable during July at 2,170 pesos per 100 kilos (\$1.82 per bushel) f.o.r. Buenos Aires and 2,100 pesos (\$1.76 per bushel) f.o.r. Bahia Blanca. By August 18, candear prices had slipped to 2,080 and 2,020 pesos (\$1.75 and \$1.70 per bushel) at Buenos Aires and Bahia Blanca, respectively.

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

Destination	June		December — June	
	1968	1969	1967-68	1968-69
thousand bushels				
<u>Western Europe</u>				
EEC:				
Belgium	—	—	176	1,204
France	—	—	1,148	647
Germany, Federal Republic	—	—	33	37
Italy	1,010	—	13,304	11,744
Netherlands	—	—	853	2,720
Sub-totals	1,010	—	15,514	16,352
<u>Other Western Europe</u>				
Britain	—	481	1,609	4,844
Denmark	—	—	16	—
Norway	—	—	37	486
Portugal	—	—	376	—
Sweden	—	—	29	—
Switzerland	—	—	7	355
Sub-totals	—	481	2,074	5,685
Totals	1,010	481	17,588	22,037
<u>Eastern Europe</u>				
Hungary	—	—	22	—
<u>Africa</u>				
Algeria	—	—	351	869
Mozambique	—	—	—	426
Totals	—	—	351	1,295
<u>Asia</u>				
China, Communist	—	—	370	—
Cyprus	—	—	—	472
India	—	—	—	4,364
Japan	—	—	—	527
Turkey	—	—	—	456
Viet-Nam	—	—	184	—
Totals	—	—	554	5,819
<u>Western Hemisphere</u>				
Bolivia	135	—	855	239
Brazil	3,263	3,506	12,856	22,187
Chile	1,084	37	2,554	2,445
Colombia	—	—	1,521	—
Paraguay	184	294	1,480	1,748
Peru	322	875	7,456	7,585
Uruguay	—	—	513	—
Totals	4,988	4,712	27,235	34,204
Totals, all countries	5,998	5,192	45,753	63,354

GRAIN SITUATION IN BRITAIN

The following account of the current crop situation in Britain has been extracted from a recent report from Mr. E.L. Gray, Assistant Commercial Secretary, London, and is reproduced with the permission of the Trade Commissioner Service, Department of Industry, Trade and Commerce.

Weather and crop conditions. — The weather in July was warm and generally dry, although some scattered storms toward the end of the month produced above normal rainfall in South Wales and Southern England.

The wheat crop in most areas of England and Wales recovered well from the effects of the late, wet spring and, with the exception of some of the spring-sown areas which are still thin and patchy, the stands are good and in general the crop is relatively clean and disease-free. The overall prospects now are for an average yield noticeably higher than in 1968.

Most areas of Scotland had the warmest July for a decade. All cereal crops grew well during the month and the wheat stands are heavy, clean and disease-free. An average or above average yield is expected.

Stocks of grain on farms. — Final estimates by the Ministry of Agriculture of stocks of grain on farms in Great Britain as of the end of June, 1969, totalled 100,000 long tons (3,733,000 bushels) of wheat, 210,000 long tons (9,800,000 bushels) of barley and 40,000 long tons (2,635,000 bushels) of oats, compared to 70,000 tons (2,613,000 bushels), 240,000 tons (11,200,000 bushels) and 70,000 long tons (4,612,000 bushels), respectively, at the same time last year. These figures include grain that has been sold but is still in store on farms.

Production estimates. — In an attempt to improve the accuracy of cereal production estimates in the future, the Home-Grown Cereals Authority has enlisted the co-operation of producers who have their own weighing equipment, in supplying the Authority with confidential returns of actual yields on an acreage basis. The information obtained from these returns will, it is hoped, provide an objective check on the official production estimates before they are published.

Minimum import price and levy arrangements. — Effective July 31, 1969, prospective rates of levy on wheat (other than seed wheat valued at not less than £34 per ton (\$2.37 per bushel), denatured wheat and durum wheat) grown in France or Belgium and consigned direct to the United Kingdom, were established for the months from August, 1969, to January, 1970, inclusive, at 10s. per ton, (3.5 cents per bushel). The prospective rate of general levy was also changed to 10s. per ton (3.5 cents per bushel) for the same period. The prospective rates of country levy on denatured wheat grown in France, Belgium or the Netherlands for direct consignment to the United Kingdom during the shipment period from August, 1969, to January, 1970, inclusive, were changed to 10s. per ton (3.5 cents per bushel) for August and September and 15s. per ton (5 cents per bushel) for October to January. The prospective rate of general levy on denatured wheat was changed similarly.

French devaluation. — Following the devaluation of the French franc, the Ministry of Agriculture announced that from Saturday, August 9, all prospective rates of country and general levy were replaced by "no quotation". This had the effect of preventing any importers from registering contracts until revised levy rates "appropriate to the new market situation" were established. Current rates of levy

were left unchanged but it was pointed out that if the Ministry were advised of any low priced grain leaving the Continent for the United Kingdom, it would be able to increase the rates of current levy before any significant amount of grain entered the country at prices below the M.I.P. level.

Home-Grown Cereals Authority. — The 4th Annual Report of the Home-Grown Cereals Authority for the year ended June 30, 1969, was published in July. In addition to detailed market information and statistics the report includes a summary of the Authority's financial operations, the forward contract bonus scheme, marketing of the 1968 crop and research and development activities. Some highlights from the report follow:

Finance. — Funds raised through levies administered by the Ministry of Agriculture totalled £.97 million (\$252 million Canadian) for barley and £.73 million (\$190 million) for wheat. The rates of levy were 11d. (12 cents) per acre and 1s. 6d. (19 cents) per cwt. on sales for barley and 2s. 6d. (32 cents) on sales for wheat. Approximately 72 per cent of the barley fund came from the sales levy and the balance from the acreage levy. All levy money is either returned to the growers by way of contract bonuses or carried forward as a credit (less the net cost of administration and research by the Authority, after allowing for a contribution by the Exchequer). The credit balances carried forward on the wheat and barley accounts will reduce the amounts to be raised by levies in the 1969-70 year.

Forward Contract Bonus Scheme. — The purpose of this Scheme is to encourage growers to enter into forward contract selling in order to ensure a continuous source of supply to domestic users. The Authority considers that the Contract Bonus Scheme is beneficial to the marketing of home-grown cereals and that this form of selling must be continued in substantial quantities if British grains are to be fully competitive with foreign supplies. In the 1968-69 year, 12,600 growers made forward contracts for wheat, 18,000 growers contracted forward sales of barley and another 22,600 made contracts for either wheat or barley.

1968 harvest. — All indications up to July, 1968, had been for a bumper harvest but storms and exceptionally wet weather during harvest time reduced both yield and quality. The low bushel-weight of the crop created difficulties for some growers in meeting their forward contracts, and as an exceptional measure, the Authority offered to amend registered tonnages in cases where there was not likely to be sufficient grain to fulfill contracts and where the grower and buyer requested a reduction. Considerable use was made of this facility. The smaller domestic crop in 1968-69 resulted in an increased volume of imports, particularly of feed wheat from the Continent. Although final figures are not yet available, the Home-Grown Cereals Authority estimates that feed wheat imports for 1968-69 will reach 750,000 tons (28 million bushels), compared to the "customary" level of 500,000 tons (18.7 million bushels).

The Home-Grown Cereals Authority has pressed for the United Kingdom's obligations under the Food Aid Convention of the International Grains Arrangement to be filled in the form of wheat or wheat flour wherever possible and the Government has indicated that under normal circumstances this would be the intention. However, with the poor harvest in 1968, there was no surplus of millable wheat available for export in 1968-69 and the U.K.'s obligation was fulfilled in cash.

Research and development. — The Home-Grown Cereals Authority has been working toward an expanded programme of research and promotion to increase the outlets and

demand for British grains through (1) production of the qualities required by the end users and (2) by finding new uses or increasing demands from existing uses. The Authority had planned to initiate research work with various organizations last year, to a value of up to £46,000 (\$120,000) but some work had to be curtailed due partly to a "freeze" on the level of contribution by the Exchequer to the Authority's administrative and research expenses.

Grain markets. — Trade in the market for domestic grains has continued quiet. A few samples of English wheat have appeared and, in general, quality is quite good. New crop soft milling wheat (16 per cent moisture content) for August and September delivery has sold for 23s. per cwt. (\$1.62 per bushel) but there has been very little activity in domestic feed wheats as sellers feel there is a good chance of getting a milling quality price for much of the new crop.

Market conditions for overseas grains were very quiet due, in part, to the uncertainties over the forward rate for sterling following devaluation of the French franc. Business was confined to occasional purchases for prompt delivery to cover immediate needs and to some resale dealings in U.S. grain on the Liverpool market. Prices ranged from £23.18s. 9d. to £24.2s. 6d. per ton (\$1.56 to \$1.57 per bushel) c.i.f., for November delivery.

The Home-Grown Cereals Authority ex farm guide prices were quoted at £22.15s. per ton (\$1.59 per bushel) for millable wheat and £20.5s. per ton (\$1.13 per bushel) for feed barley for August and September delivery.

WHEAT SITUATION IN ITALY

The following account of the current situation in Italy has been extracted from a report by Mr. U. Boschetti, Senior Commercial Assistant, Canadian Embassy, Milan, under date of August 1, 1969, and is reproduced with the permission of the Trade Commissioner Service, Department of Industry, Trade and Commerce.

General. — Wheat is the only estimate available on the 1969 crop. It is expected that early data on coarse grains will be available in autumn when late planting varieties of corn are sown.

Latest information on the wheat crop reveals that the harvest is expected to reach about 9.5 million metric tons (349.1 million bushels) composed of 7 million metric tons (257.2 million bushels) of soft wheat and 2.5 million metric tons (91.9 million bushels) of durum.

Should final results confirm the above figures, the 1969 crop will be greater than last year's by 150,000 metric tons (5.5 million bushels). It is worth noting that the 1969 crop will result in an increase of 500,000 metric tons (18.4 million bushels) of durum and a decrease of 300,000 metric tons (11.0 million bushels) of soft wheat based on the 1968 crop. Consequently, the 1969 crop would appear to be of better quality due to the reduced imbalance between soft and durum wheat.

The relevant acreage utilized in 1969 was 1,455,000 hectares (3,594,000 acres) for durum and 2,766,000 hectares (6,832,000 acres) for the soft variety. Using the estimates given above, the 1969 yields would be approximately 2.3 metric tons per hectare (33.5 bushels per acre) for both varieties, 2.6 metric tons per hectare (37.6 bushels per acre) for soft wheat and 1.8 metric tons per hectare (25.6 bushels per acre) for durum.

Granted favourable weather conditions the foregoing points to a record crop, definitely higher than the 1964-68 five-year average of 9.4 million metric tons (345.4 million bushels). Though less acreage is being utilized higher yields, particularly for durum wheat, are expected.

In June the EEC Authorities published their proposals concerning the Agricultural prices to be applied to the 1970-71 crop year. The EEC Authorities have again confirmed their position on the reform of the agricultural structures (the so called Mansholt plan) by saying that the price increase on the agricultural surplus "will be put into effect only when the demand caused by both the increase in population and a larger gross national product strained the supply level".

Following are the proposed prices which, for comparison purposes, are shown together with those of the 1969-70 crop year.

<u>Type of cereal</u>	<u>1969-70 prices</u>	<u>1970-71</u> <u>Proposed prices</u>	<u>Difference</u>	<u>+</u>
		Canadian dollars per bushel		
<u>Durum wheat</u>				
Indicative price	3.67	3.67	—	
Intervention price	3.45	3.45	—	
<u>Soft wheat</u>				
Indicative price	3.12	3.15	+	.03
Intervention price	2.90	2.87	—	.03

It is worth noting that the 1970-71 crop year for the above wheat runs from August 8, 1970 to July 31, 1971.

GRAIN SITUATION IN FEDERAL REPUBLIC OF GERMANY

The following account of the current grain situation in the Federal Republic of Germany has been extracted from a report received from Mr. R.R. Parlour, Commercial Counsellor, Canadian Embassy, Bonn, West Germany, under date of August 8, 1969 and is reproduced with the permission of the Trade Commissioner Service, Department of Industry, Trade and Commerce.

Weather conditions. — Farmers in West Germany still expect a grain crop above the average, with generally better results in the South and West than in the North. Harvesting operations started late because, temporarily, the weather was too cold and wet during June (average precipitation throughout the Federal Republic of Germany amounted to 140 per cent of normal during June). As soon as the weather conditions improved, farmers started with the harvesting of winter barley. Ideal harvest conditions have prevailed through July and early August (55 per cent of normal precipitation for July). It is expected therefore that Germany can reckon on a good grain harvest this year, however, the record results of 1968 will probably not be reached. According to official estimates in early July, a total of 18 million metric tons of grain is expected (not including maize). This compares with 18.8 million metric tons in 1968 and 16.2 million metric tons average for 1963-68. About 8.8 (previous year 9.5) million metric tons will probably go to bread grain and 9.1 (9.2) million metric tons to feed grain. Again the cultivated area was extended this crop year by about 1 per cent to almost 5.1 million hectares (about 12.7 million acres).

Farm sales. — Farm sales of grain from July 1968 to the end of May 1969 amounted to 7,432,100 metric tons, i.e. 662,400 metric tons or 10 per cent more than the year before. The sales of wheat amount to 3,620,700 metric tons (133,036,000 bushels), 11 per cent over previous year's figure. Sales of rye were 1,275,200 metric tons (50,202,000 bushels), 9 per cent above the previous year. The sales of feed and industrial grains were 2,536,200 metric tons, or 9 per cent, larger than the year before.

Farm stocks. — According to the Federal Ministry of Agriculture, the following stocks were held on farms at the end of May 1968 and 1969, in metric tons.

	<u>May 1968</u>	<u>May 1969</u>	<u>Per cent</u>
Bread wheat	498,000	525,000	+ 5
Rye and winter mixed grains	356,000	409,000	+ 15
Barley	470,000	563,000	+ 20
Oats and mixed spring grains	599,000	746,000	+ 25
Totals	1,923,000	2,243,000	+ 17

Farm stocks of bread grains were 934,000 metric tons or 9 per cent higher than at the same time last year and 208,000 or 29 per cent higher than the six-year average.

The total grain stocks represent 12 per cent of the amount harvested in 1968. These stocks were about 320,000 metric tons or 17 per cent higher than in the last year.

Market stocks. — Due to seasonal influence market stocks of grain and grain products further decreased in May. With regard to wheat the market stocks amounted to 1,012,900 metric tons, product converted (37,217,000 bushels), i.e. about 7,000 tons (257,000 bushels), one per cent larger than last year's figures having been below previous year's level for several months. Market stocks of all bread grains, product converted, of 1,287,400 metric tons, were 30,900 tons smaller than at the end of May 1968. Stocks of rye, at 274,500 metric tons (10,806,000 bushels) increased by 10 per cent and of feed and industrial grains, at 809,700 metric tons, were about 59,400 metric tons or 6 per cent higher than the previous figure. Total market stocks of grain at the end of May 1969 amounted to 2,097,100 metric tons or 3 per cent more over the 1968 figure of 2,030,700 tons.

Milling of wheat. — The share of domestic wheat for consumption in per cent of the total consumption decreased within the last three years from 69 per cent down to 60 per cent. In April 1969 this share was only 43 per cent which accounts for the increasing imports of French wheat. With regard to the milling for export purposes, the share of domestic wheat decreased from 68 per cent in the 1966-68 period down to 47 per cent in 1968-69.

Import and Storage Agency. — Up to June 30, 1969, the Federal Import and Storage Agency took over the following quantities of the 1968 crop (previous year's figures in brackets).

Bread wheat	1,990,000 (736,000)	metric tons
Bread rye	136,000 (127,000)	" "
Other rye	224,000 (24,000)	" "
Winter barley	288,000 (76,000)	" "
Summer barley	194,000 (7,000)	" "

The disruption of the German intervention system caused by the enormous imports of French grain into Germany has prompted the German Government to take further action to ensure German grain from this year's harvest can be taken up.

Instead of a border levy, as proposed by the Germans as compensation for exchange rate disadvantages to the trade, the so-called intervention B will be applied. The Commission has made this decision according to a former French example so that the German owners of grain do not have to bear the burden of the (likely) revaluation until next spring. Besides this the denaturing premiums for wheat will be raised in order to direct more bread grain into the feed trough.

Under intervention B every owner of wheat, rye and barley — including the farmers — can conclude a storage contract with the Import and Storage Agency before October 1, 1969. A prerequisite is that the grain (at least 100 metric tons) meets the intervention requirements and will not be taken up physically by intervention before December 1, 1969. In order that the Import and Storage Agency only have to take up small quantities, they pay the intervention price plus a monthly premium of 0.40 U.A. per metric ton (U.A. = Unit of Account = Canadian \$1.079) for bread wheat, 0.40 U.A. per metric ton for rye and 0.35 U.A. per metric ton for barley to those who participate in the contract; even if the grain is processed and exported. The storage premium is granted for grain under contract which is processed or exported in December. If processed or exported in January the owner receives double the premium. For processing and export from February to July 31, 1970, the premium is paid from August or September 1969. The premium is only payable however, for a maximum of six months. Therefore the maximum benefits are: for bread wheat 10.80 DM per metric ton, rye 9.60 DM per metric ton and barley 8.40 per metric ton.

This regulation means that the Import and Storage Agency bears the full risk of a change in the exchange rate of the DM or revaluation of the European U.A. The additional storage grant will bring all grain to intervention from February 1970 which has not been processed or exported.

The new measures will not affect further imports of French wheat as the weakness of the futures market Franc still facilitates imports through reductions of 20 to 30 DM per metric ton. Furthermore the denaturing premiums will be raised by 8 DM per ton from August 1, 1969 onwards. This means that feed grain would be cheaper than barley.

Imports of grain. — According to reports issued by the Federal Office of Statistics, the following quantities were imported from July 1, 1968 — May 31, 1969, comparative figures of last year in brackets:

	<u>thousand metric tons</u>	
Wheat (products)	2,315	(1,760)
Rye (products)	68	(82)
Total bread grain	2,383	(1,842)
Barley (converted)	1,368	(1,822)
Oats (converted)	326	(472)
Corn (converted)	2,059	(2,222)

Imports of wheat. — German imports of wheat in the July-May 1968-69 period, at 2,234,000 metric tons (82,085,000 bushels) were considerably higher than the 1,705,000 tons (62,647,000 bushels) the year before. Canadian supplies at 426,182 metric tons (15,659,000 bushels) dropped by 64,000 tons (2,352,000 bushels) and their share in the total figure decreased from 28 to 19 per cent.

WHEAT SITUATION IN FRANCE

The following account of the wheat situation in France has been extracted from a report from Mr. J.G. Beaudette, Agricultural Secretary, Canadian Embassy, Paris, under date of September 11, 1969 and is reproduced with the permission of the Trade Commissioner Service, Department of Industry, Trade and Commerce. Where possible, conversions to Canadian measures have been made for the convenience of our readers.

Weather and crops in July. — Following a first seasonal week, July then had a cool, windy and very wet second week brought about by a hurricane which hit north-western France from Brittany into the low countries. But, from the 12th until the last days of the month, the climate was hot and sunny with only scattered showers.

The soft wheat harvest got under way under ideal conditions in the last ten days of July. In the northwest and Paris regions, the yields will still be as good as in 1968 despite some reduction due to the heat. In the east, yields may turn out inferior to last year's, while south of the Loire the crop also suffered from the heat. For durum wheat, the first samples from the south show relatively small kernels.

The August 1 estimates of area and production for both wheats indicate a downward adjustment for production compared with the July 1 expectations. Soft wheat and durum area and production for 1969 and 1968 are shown below:

	Area		Production	
	<u>1968</u>	<u>1969</u>	<u>1968</u>	<u>1969</u>
	thousand acres		thousand bushels	
Soft wheat	9,796	9,673	534,872	511,378
Durum wheat	3	3	10,435	12,956

However, recent reports indicate that the soft wheat crop figure will again be reduced, this time to between 13 million and 13.5 million tons (477.7 million and 496.0 million bushels).

Marketings, supply and utilization. — Soft wheat marketings by growers in July totalled 1,886,800 tons, (69,327,000 bushels) of which 1,878,100 tons (69,008,000 bushels) were of the 1969 crop. This compares with 1,666,600 tons (61,236,000 bushels) in July 1968. Soft wheat deliveries of the 1968 crop have therefore totalled 11,736,000 tons (431,219,000 bushels) out of a total production of 14,557,000 tons, (534,872,000 bushels), meaning that growers have apparently disposed of 3 million tons (110,230,000 bushels) on their own farms. Out of the 1969 ONIC last estimate, marketings would reach 11 million tons (404 million bushels), but this crop figure will in all likelihood be reduced if the crop turns out to be lower than presently evaluated officially. Durum marketings in July reached 98,300 tons (3,612,000 bushels) all of 1969 crop.

Details on the supply and utilization of French soft and durum wheats are shown in the following tables. In these statistics, ONIC does not take into account imports

which are considered to go directly to millers, and do not enter the normal commercial channels (for storage, intervention, etc.). Availabilities in 1968-69 at 14.3 million tons (524.4 million bushels) were some 1.7 million tons (64 million bushels) higher than in the previous crop year. However, these extra supplies were nearly completely absorbed by spectacular exports to EEC partners and by increased domestic use for animal feed. Carryover stocks at August 1, 1969 are therefore only 400,000 tons (15 million bushels) higher than a year earlier. For durum wheat, increased growers' marketings of 65,000 tons (2.4 million bushels), higher millings of 20,000 tons (0.7 million bushels), and increased exports of 37,000 tons (1.3 million bushels), would leave a carryover figure nearly the same as at the end of the 1967-68 crop year.

Soft Wheat Supply and Utilization (French-grown only)

	1967-68	1968-69
	thousand bushels	
<u>Supply</u>		
Commercial stocks at August 1	96,598	93,229
Deliveries to Grain Board	363,895	431,219
Totals	460,493	524,448
<u>Utilization</u>		
Sales to French millers	169,438	188,894
Animal feed (domestic)	20,477	29,292
Sales to intermediate storage	17,335	—
Seed returned to producers	7,374	8,061
Exports (inc. flour) to EEC	33,863	88,210
to Africa	8,282	8,524
to 3rd countries	112,541	95,415
Losses, etc.	1,845	2,149
Totals	371,155	420,545
Balance August 1 for carryover	89,336	103,903
Imports (all for millers)	5,306	9,370

French-grown Durum Supply and Utilization

<u>Supply</u>		
Commercial stocks at August 1	3,884	3,564
Deliveries to Grain Board	8,065	10,439
Totals	11,949	14,003
<u>Utilization</u>		
Deliveries to millers	6,081	6,820
Seed	489	606
Other domestic use	132	59
Exports to EEC	658	2,539
to 3rd countries	941	408
Losses	85	73
Totals	8,385	10,505
Balance August 1 for carryover	3,564	3,498
Imports (all for millers)	11,897	12,875

Imports. — Breakdown of imports for August-July 1967-68 and 1968-69, are calculated from Customs statistics. These show that, despite the large domestic crop in both wheats, imports increased in 1968-69 over the 1967-68 levels. The USA maintained its stranglehold on the durum wheat market, with Canada also shipping more, but Greece and Argentina hardly supplied at all. For hard wheats, the USA received stiff competition from Canada, Argentina and also the Soviet Union. These statistics do not include seed wheat or denatured wheat imports of which there were small quantities from the USA (durum seed only) and EEC partners.

French Wheat Imports

	<u>1968-69</u>	<u>1967-68</u>
	thousand bushels	
<u>Durum Wheat</u>		
Belgium	19	—
Italy	—	51
Greece	180	2,685
U.S.A.	10,842	6,914
Canada	1,377	117
Argentina	—	1,476
Others	(1)	(1)
Totals	12,418	11,243
<u>Soft & Hard Wheats</u>		
Belgium	12	12
Holland	10	10
Germany	76	—
U.S.S.R.	869	10
U.S.A.	4,064	3,888
Canada	2,433	1,224
Algeria	—	3
Argentina	1,855	46
Australia	34	114
Others	1	—
Totals	9,354	5,306

(1) Less than 500 bushels.

Exports. — French wheat exports (excluding seed) in 1968-69 totalled 5,277,000 metric tons (193.9 million bushels), a 24 per cent increase over the 4,251,000 tons (156.2 million bushels) sold in foreign markets in 1967-68. Durum shipments nearly doubled to 81,000 tons (3.0 million bushels), Italy the leading buyer with 52,254 tons (1.9 million bushels) followed by Germany, 9,184 tons (337,000 bushels), Belgium, 8,218 tons (302,000 bushels), and Switzerland, 7,090 tons (261,000 bushels). Denatured soft wheat exports moved from 33,000 tons (1,208,000 bushels) only, in 1967-68 to 476,000 tons (17,492,000 bushels) in the last crop year; Germany, Holland and Belgium buying most of it.

Milling quality soft wheat exports reached 4,719,200 tons (173,400,000 bushels) in 1968-69, compared to 4,174,300 tons (153,378,000 bushels) in the previous year. Major customers include the EEC partners with the following quantities in thousands of bushels: Germany, 38,090; Holland, 20,615; Belgium, 8,939; Italy, 3,948; and also Egypt, 29,870; Britain, 22,769; Algeria, 7,610; Senegal, 6,263; Bulgaria, 5,316;

Ireland, 3,221; and Philippines, 3,020. By the end of July 1969, only 2,067,000 bushels out of the 29,395,000 bushel-sale to Mainland China had been shipped.

Wheat flour exports in the crop year ended July 31, 1969 were 470,000 metric tons, about 12 per cent less than the 532,000 tons sold abroad during the previous crop year. Egypt was by far the most important outlet, taking 118,500 tons. Other big customers included (with quantities in thousand metric tons): Ceylon 38, North Korea 35, West Germany 28, Jamaica and Mauritius 24 each, Martinique 23, Guadeloupe 19, Yemen and South Yemen 15 each.

In late August, France sold to Egypt 300,000 metric tons (11,023,000 bushels) of soft wheat within the framework of the trade protocol signed last spring. Delivery is to be made between October 1969 and January 1970 at a price of US\$50.80 (\$1.49 per bushel Canadian) cost and freight, payment 30 per cent cash, 70 per cent over the next two years. On the 800,000 ton (29,395,000 bushels) sale to China, another 65,000 tons (2,388,000 bushels) approximately went in August, leaving 680,000 tons (24,900,000 bushels) to be delivered between September and next spring. Finally, a Polish delegation is expected in Paris very soon to discuss a purchase of between 200,000 and 300,000 tons (7,349,000 and 11,023,000 bushels) of wheat.

The problem concerning cereals sold prior to August 11 (devaluation) for delivery later still has not been solved. The French producers and exporters have been asking for exemption from the export tax for these cereals, since large quantities are involved and payment of the tax could well force a number of export firms to close down. The EEC Cereal Trade Committee confirmed out of Brussels that these French export contracts covered just under 4 million tons of cereals of which 2.4 million to the EEC and 1.5 million to third countries. Wheat involved included 700,000 tons (25,720,000 bushels) of soft wheat and 160,000 tons (5,879,000 bushels) of denatured wheat to Germany; 95,000 tons (3,491,000 bushels) soft to Holland; 130,000 tons (4,777,000 bushels) soft to Italy and 1,050,000 tons (38,580,000 bushels) soft to third countries including most of the China deal.

In North Africa, the Algerian Cereals Office has advised that it would not release any details on the 1969 domestic crop or import requirements before the end of September. It is rumoured, however, that the cereals crop is slightly better than average, and that Algeria may be importing around 200,000 tons (7,349,000 bushels) of soft wheat and possibly up to the same quantity of durum. In Morocco, the cereals output is reported to be much lower than last year's, though no statistics are available. The import situation remains uncertain, since Morocco stocked its 1968 surpluses and may not require much, if any, wheat imports in 1969-1970.

Denatured French Wheat Exports

Country	Durum wheat		Soft wheat	
	1967-68	1968-69	1967-68	1968-69
	thousand bushels			
<u>Western Europe</u>				
EEC:				
Belgium	43	153	22	4,304
Holland	19	(1)	9	4,953
Germany	51	32	1,002	7,305
Italy	—	—	52	5
Sub-totals	113	185	1,085	16,567

Denatured French Wheat Exports

Country	Durum wheat		Soft wheat	
	1967-68	1968-69	1967-68	1968-69
thousand bushels				
<u>Other Western Europe</u>				
Britain	—	—	26	—
Finland	—	—	7	—
Ireland	—	—	82	105
Switzerland	—	—	7	811
Sub-totals	—	—	122	916
Totals	113	185	1,207	17,483
<u>Asia</u>				
China	—	—	—	10
<u>Others</u>	3	6	1	—
Totals, all countries	116	191	1,208	17,492

French Wheat Exports

Country	Durum wheat		Soft wheat	
	1967-68	1968-69	1967-68	1968-69
thousand bushels				
<u>Western Europe</u>				
EEC:				
Belgium	41	149	5,164	8,939
Holland	27	18	9,843	20,615
Germany	125	306	10,619	38,090
Italy	356	1,920	7,077	3,948
Sub-totals	549	2,393	32,703	71,592
<u>Other Western Europe</u>				
Andorra	—	—	16	14
Austria	—	—	27	—
Britain	140	132	12,683	22,769
Denmark	—	—	17	—
Greece	26	—	—	—
Ireland	9	—	988	3,221
Malta	—	—	176	184
Norway	22	—	1,316	1,790
Portugal	—	—	1,585	2,536
Switzerland	447	261	7,853	1,654
Sub-totals	644	393	24,661	32,168
Totals	1,193	2,786	57,364	103,760

French Wheat Exports

Country	Durum wheat		Soft wheat	
	1967-68	1968-69	1967-68	1968-69
thousand bushels				
<u>Eastern Europe</u>				
Bulgaria	—	—	2,162	5,316
Poland	—	—	8,957	—
Totals	—	—	11,119	5,316
<u>Africa</u>				
Algeria	—	—	10,432	7,610
Angola	—	—	1,269	1,074
Cameroun	—	—	988	1,213
Central African Republic	—	—	156	230
Congo (Brazza)	—	—	736	614
Egypt	—	—	22,256	29,870
Gabon	—	—	—	28
Ivory Coast	—	—	1,604	167
Mauritania	—	—	—	11
Morocco	—	—	5,661	—
Mozambique	—	—	895	909
Senegal	—	—	4,979	6,263
Sudan	—	—	—	2,194
Tunisia	—	—	1,328	2,185
Totals	—	—	50,304	52,368
<u>Asia</u>				
China (Mainland)	—	—	22,888	2,067
Hong Kong	—	—	224	357
Israel	—	11	—	—
Japan	—	—	220	473
Lebanon	293	—	2,229	15
Malaysia	—	—	—	650
Philippines	—	—	703	3,020
Singapore	—	—	—	855
Syria	—	—	2,009	1,789
Taiwan	—	—	—	1,606
Thailand	—	—	—	118
Turkey	—	—	—	1,010
Totals	293	11	28,273	11,960
<u>Western Hemisphere</u>				
Brazil	—	—	5,624	—
Chile	—	—	404	—
Venezuela	—	—	279	—
Totals	—	—	6,307	—
Others	1	2	9	—
Totals, all countries	1,485	2,798	153,378	173,400

(1) Less than 500 bushels.

CALENDAR OF WHEAT EVENTS

- July 31 The Canadian Wheat Board in a press release announced in part a policy of "Deferred Delivery Permits" for producers. The Board had previously indicated that it was hopeful that sufficient space would be created in country elevators to enable producers to complete delivery of a five-bushel specified acreage quota by July 31, 1969. Notwithstanding the excellent co-operation received from the railways, elevator companies and terminal operators, it has not been possible to fully reach this objective at some delivery points. The Board is therefore instituting a policy of granting a deferred delivery permit to producers who had grain on hand at July 31, 1969 and were not able to deliver the five-bushel specified acreage quota during the 1968-69 crop year.
- August 11 A report published by the Crop Reporting Board, United States Department of Agriculture, indicates that all wheat production, in the United States in 1969, was forecast at 1,459 million bushels, 7 per cent below the record high 1968 output and 4 per cent less than in 1967.
- 18 A report from Mr. F.P. Weiser, Commercial Counsellor, Canberra, indicated that if good weather conditions are enjoyed in Australia during the growing and harvesting period a crop of some 520 million bushels can be expected. This would be the second-highest crop ever harvested.
- 19 According to a report from Mr. S.E. Kidd, Assistant Commercial Secretary (Agriculture), Buenos Aires, the Secretariat of Agriculture and Livestock in Argentina has issued the first official estimate of the area sown to wheat in 1969-70 of 6,270,000 hectares (15.5 million acres). This is 6 per cent less than the 1968-69 sowings, and one per cent and 10 per cent less than the averages of the last five- and ten-year periods, respectively.
- September 2 The Canadian Wheat Board in its Instructions to the Trade Re - Quotas (General) announced in part that effective immediately and until Friday, November 28, 1969, a supplementary quota on high grade durum wheat of five bushels per acre seeded to durum wheat is hereby established at all delivery points.
- 5 Based on conditions at August 15, Canada's 1969 wheat crop was forecast at 678.1 million bushels, 4 per cent larger than last year's 649.8 million, and 21 per cent above the ten-year (1958-67) average of 560.4 million, in spite of the decrease in acreage of 15 per cent from the 1968 seeded area.
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