

The wheat review

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TABLE OF CONTENTS

	<u>Page</u>
<u>World Wheat Situation</u>	
August-October Exports Lower than a Year Ago	5
Wheat Supplies of Four Major Exporters Down from a Year Ago	5
World Wheat Situation and Outlook	6
<u>Canadian Situation</u>	
Canadian Wheat Situation and Outlook	10
Supplies Decline from Year Ago	13
Exports Higher than Previous Year	14
Marketings, Disappearance and Visible Supplies	14
November 1971 Exports of Wheat and Flour Total 62.3 Million Bushels	14
Provisional Board for Grain Institute Appointed	15
Farmers' Marketings	16
Canada's 1971 Wheat Crop Estimated at 523.7 Million Bushels	17
Wheat Shipments from Churchill during 1971 Season	18
Licensed Storage Capacity of Canadian Grain Elevators	19
General Quotas 1971-72 C.N.R. and C.P.R. Blocks	20
Special Quotas 1971-72	22
Visible Supply of Canadian Wheat	23
Grading of Wheat Inspected, August-October 1971 with Comparisons	23
Weekly Visible Supply and Farmers' Marketings (Charts)	24
Lake Shipments of Canadian Grain	25
Rail Shipments of Wheat to Maritime Ports	25
Rail Shipments of Wheat from Thunder Bay	26
Overseas Exports of Canadian Grain by Ports of Loading	26
Shipments Under Feed Grain Assistance Regulations	27
Wheat Shipments from Four Major Exporters by Regions (Charts)	28
Canadian Wheat and Flour Exports by Regions (Charts).....	29
Monthly Exports of Canadian Wheat and Wheat Flour	30
Exports of Canadian Wheat and Wheat Flour by Destination, Crop Years 1970-71 and 1969-70	31
Exports of Canadian Wheat by Destination	34
Customs Exports of Canadian Wheat Flour by Countries of Consignment	38
Canadian Wheat Board Weekly Average Cash Wheat Prices	40
<u>Canadian Flour Milling Situation</u>	
Production and Exports	41
<u>United States Situation</u>	
Supplies Above Previous Year	42
Exports Decrease from a Year Ago	42
Summary of the Wheat Situation	43
Stocks of Wheat in All Positions October 1, 1971	44
<u>Argentine Situation</u>	45
<u>French Situation</u>	48
<u>Wheat Situation in Federal Republic of Germany</u>	52
<u>Wheat Situation in Britain</u>	57
<u>Wheat Situation in Japan</u>	59
<u>Australian Situation</u>	61
<u>Calendar of Wheat Events</u>	68

S Y M B O L S

The following standard symbols are used in
Statistics Canada publications:

- .. figures not available.
- nil or zero.
- P preliminary figures.
- r revised figures.

WORLD WHEAT SITUATION

August-October Exports
Lower than a Year Ago

Total exports of wheat and wheat flour in terms of wheat from the four major exporting countries during the August-October period of the current Canadian crop year amounted to 391.6 million bushels, 10 per cent below the 436.4 million exported during the same three months in 1970 but 10 per cent more than the ten-year (1960-69) average shipments for the first quarter of the crop year, of some 357.0 million bushels. As indicated in the accompanying table, based on the Canadian crop year, Canada registered an increase over the 1970-71 comparable total, while exports from Australia, United States and Argentina were lower.

Exports of Wheat and Flour in Terms of Wheat, August - October 1971
with Comparisons

August - October	Canada	Australia	United States	Argentina	Total	France
million bushels						
1950	49.3	30.9	51.4	17.2	148.8	
1951	75.4	30.5	116.0	17.9	239.8	
1952	94.6	23.0	85.1	—	202.7	
1953	79.2	16.6	54.8	32.5	183.1	
1954	73.8	21.5	53.8	33.7	182.8	
1955	60.1	23.2	54.4	30.2	167.9	
1956	81.4	40.9	118.8	24.2	265.3	
1957	73.5	24.9	100.7	21.8	220.9	
1958	73.8	16.2	108.2	21.4	219.6	
1959	76.3	20.4	100.3	15.1	212.1	
1960	81.8	27.7	150.8	25.5	285.8	
1961	106.2	55.9	180.0	6.1	348.2	
1962	84.7	23.2	140.2	8.7	256.8	
1963	139.6	47.3	192.1	12.7	391.7	
1964	133.8	37.4	185.5	26.6	383.3	
1965	181.5	56.2	203.4	70.5	511.6	
1966	172.0	41.3	243.1	19.4	475.8	
1967	71.1	74.3	199.4 ^r	5.3	350.1 ^r	
1968	94.4	52.0	128.6	17.2	292.2	43.7
1969 ^r	58.7	75.7	123.4 ^r	16.9	274.7 ^r	53.7 ^r
1970 ^r	131.2	91.1	192.2	21.9	436.4	31.7
1971 ^p	160.7	80.1	146.2	4.6	391.6	30.5(1)

(1) August-September only.

Wheat Supplies of
Four Major Exporters
Down from a Year Ago

Latest available estimates indicate that supplies of wheat remaining on or about November 1, 1971 in the four major exporting countries, for export and for carryover at the end of their respective crop years, amounted to 2,489.9 million bushels, some 5 per cent below the 2,607.4 million available a year ago. This decrease reflected smaller supplies in Canada, Australia and Argentina which more than offset an increase in United States. Supplies on or about November 1, 1971, in millions of bushels, were held as follows, with last year's comparable figures in brackets: Canada, 955.4 (1,053.7); Australia, 155.7 (294.4); United States, 1,374.7 (1,225.0); and Argentina, 4.1 (34.3).

World Wheat
Situation and
Outlook

The following is taken from a report on the world wheat situation as prepared by the Economics Branch of the Canada Department of Agriculture, for the Canadian Agricultural Outlook Conference, November 22 and 23, 1971.

Situation 1970-71. — The world wheat harvest in 1970-71 (excluding the People's Republic of China) has been estimated at 10.6 billion bushels(1). Chinese production of perhaps 850 to 900 million bushels could raise the world total to over 11.45 billion bushels. Excluding China, total production was up from 1969-70 by about 100 million bushels. If the increased Chinese production is included, total world production in 1970-71 will be about 150 million bushels higher than in 1969-70.

The main production increase occurred in the U.S.S.R., which harvested its second largest crop — 3.66 billion bushels — this is more than 700 million bushels larger than in 1969-70.

Apart from Africa where some minor increases occurred, all other main regions had production decreases. North American production was down for the year by about 20 per cent to less than 1.8 billion bushels. South America was down by about 22 per cent to just under 300 million bushels. West Europe was down by over five per cent to 1.6 billion bushels and East Europe by over 6 per cent to a little more than 900 million bushels. In Australia, early estimates were revised downward to 277 million bushels, a reduction of 110 million or 28 per cent from the previous year.

Total supplies of the seven main exporters, including Argentina, Australia, U.S.A., Canada, the EEC, Sweden and Spain in 1970-71 were down by nine per cent from 1969-70 to about six billion bushels (163.7 million metric tons). Production in all of these countries was lower, but stocks to start the year were up by nearly 100 million bushels to about 2.4 billion bushels (65.8 million metric tons).

Trade which started to improve in 1969-70, continued to improve in 1970-71. Total world trade for the crop year is expected to reach just under 2 billion bushels, an increase of about 150 million bushels. In 1969-70, some 100 million bushels of the increase was for feed, much of which came from France; however in 1970-71, French feed supplies were down, and corn blight reduced quantities of corn on world markets. Increases in wheat supplies were required in both Eastern and Western Europe where crops were poor. The increase in exports has been unevenly spread. Exports by France were down more than 50 per cent for the first eight months of the crop year, but the United States exports (in wheat and flour) for the first 11 months were up 130 million bushels to 680 million bushels.

Prices of wheat on world markets strengthened during the early months of the 1970-71 crop year but weakened in early 1971 as the demand for feed wheat eased.

United States wheat supplies in 1970-71 were 2,264 million bushels; changed little from the previous year. This was a reduction in U.S. production from 1,460 million bushels to 1,378 million and an increase in stocks from 819 to 885 million bushels left supplies nearly the same as in 1969-70. United States exports as projected by U.S.D.A. were expected to reach 735 million bushels for 1970-71 compared with 606 million in 1969-70. Their main increases in exports in the early months of the crop year were to the United Kingdom, West Germany, Japan and Korea, but increases were

(1) 36.7433 bushels of wheat equal one metric ton.
One metric ton equals 2,204.6 pounds.

general to many European and Asian countries. Quantities fed to livestock were expected to continue at high levels with a slight increase in feeding on farms where wheat is grown. Carryover at June 30, 1971 was projected at 709 million bushels down 20 per cent from the 885 million the previous June. Preliminary estimates are for a crop of 1,547 million bushels in 1971, a 12 per cent increase over 1970.

Australian wheat supplies for 1970-71, at 542 million bushels, were lower by 112 million from the previous year. Although stocks were not appreciably lower, production fell by 110 million bushels to 277 million compared with 387 million in 1969-70. Exports at 204 million bushels were up 25 per cent from 1969-70 and, as a result, the carryover at the end of the crop year dropped by 37 per cent or 156 million bushels to 257 million bushels. Sowing conditions in Queensland and New South Wales for the 1971-72 crop have been unfavourable. The national quota for 1971-72 has been raised to 339 million bushels.

In Argentina, total supplies of wheat were sharply lower with one of the smallest crops on record, estimated at only 155 million bushels. This is more than 100 million bushels below the previous year. Carryover was only 27.5 million bushels making total available supplies of 182 million bushels. With estimated domestic requirements of 150 million bushels, only 32 million bushels remain available throughout the Argentine crop year for export and carryover. The Government of Argentina raised price support levels in an effort to increase production and last year's low production level is not likely to be repeated. In the interval, however, some imports could be required.

In the European Economic Community, wheat production in 1970 was down to about 1,086 million bushels, some 70 million bushels less than in 1969. EEC exports during this crop year are likely to be down by over 100 million bushels from last year. France's exports from August through May were down from about 150 million to about 70 million.

France's acreage in 1971 is up about one half million acres over last year but still a quarter million below 1969. Stocks at June 1, 1971 were over 80 million bushels higher than a year ago.

By the end of the 1970-71 crop year stocks in the hands of the seven main exporters fell by about 540 million bushels (14.8 million metric tons) or 22 per cent to about 1.87 billion bushels (51 million metric tons). However production increases in the main exporting countries of 19 per cent to 4.1 billion bushels (111 million metric tons) will result in total supplies higher than last year's level by nearly 100 million bushels. Both Eastern and Western Europe as well as the United States and Canada have larger acreage, and growing conditions in North America and Europe have been generally favourable. The United States, at September 1, 1971, estimated a crop of 247 million bushels greater than in 1970. The very large U.S.S.R. crop in 1970 was largely due to extremely high yields on spring planted wheat. Crop yields again appear above normal and approximately the same acreage this year should result in another year of very high production.

Outlook 1971-72 - Summary. - Since nearly three quarters of Canada's wheat is sold on world markets, world supply and demand are of major significance to the Canadian agricultural outlook.

The World outlook for wheat is considered to be less favourable in 1971-72 for exporters such as Canada. This is because World wheat production is greater over the

year before with increases in both exporting countries and in many countries which normally import part of their requirements.

World production

Total world wheat production in 1971-72 (excluding the People's Republic of China) could reach a record 308 million metric tons (11.3 billion bushels). This compares with about 289 million metric tons (10.6 billion bushels) in 1970-71 and exceeds the former record of 305 million metric tons (11.2 billion bushels) in 1968-69. Weather for planting was much more favourable in Europe in the fall of 1970 and the spring of 1971; winter kill was less significant, and the flooding conditions which had affected Eastern Europe in the spring of 1970 were not repeated in 1971. Yields in 1971 have been higher throughout most of Europe. Production in the EEC is estimated at 33.7 million metric tons (1.2 billion bushels), 11 per cent above last year. Wheat acreage in the U.K. was up 15 per cent with preliminary production estimates at a record 4.6 million metric tons (169 million bushels). Spain, Austria, Greece and Sweden all have had better than average crops. In Eastern Europe, in spite of spring drought, the wheat crop is much better than last year except in East Germany. Initial reports from the USSR indicate good yields although total production could be somewhat below last year's production. In the Near East drought has affected the eastern part of the region, and import requirements will likely be higher in Iran, Iraq and Afghanistan, although Turkey's production increased. India's production at 23 million tons (.8 billion bushels) is a near record and together with other food grains is approaching self-sufficiency. Pakistan's production on the other hand, is down and requirements should be higher. China appears to have an average crop. Production in North African importing countries is little changed. In the Americas, Mexico had a major drought, but Brazil and the Argentine have larger acreages and larger crops are forthcoming. Australia is expected to show little change from last year.

World supply

The supply position of Argentina, Australia, U.S.A., Canada, the EEC, Sweden and Spain will be slightly larger this year than last year. Beginning stocks for 1971-72 are down 14.8 million tons (0.5 billion bushels) but 1971 production is up by 17.6 million tons. Total supplies are 166 million tons (6.1 billion bushels) compared with 163.7 million (6.0 billion bushels) last year and 179.8 million tons (6.6 billion bushels) two years ago.

In the United States, wheat acreage is up four million acres and production was estimated on October 1, 1971, at 1.627 billion bushels (44.3 million metric tons), some 249 million (6.8 million metric tons) more than in 1970. A reduction in stocks from 885 to 730 million bushels (24.1 to 19.9 million metric tons) still leaves the total supply for the 1971-72 crop year at nearly 100 million bushels (2.7 million metric tons) higher than last year. This is significant because the Americans will likely use 10 to 15 per cent less wheat as feed, due to the lower prices for the sharply increased corn crop. Winter wheat at 31.6 million metric tons (1,162 million bushels), made up over 70 per cent of total production and was four per cent above the previous year. Durum which made up about five per cent of the total had a production increase in 1971 of 37 million bushels (1.0 million metric tons) to 87 million bushels (2.4 million metric tons).

Yields of durum were sharply higher in 1971 over 1970 and yields on spring wheat were at a record 29.8 bushels.

Production of spring wheat accounted for about 24 per cent of the total and at a record 376 million bushels (10.2 million metric tons) is 79 per cent over 1970 production.

In the EEC, total wheat production is estimated to be above average at 33.7 million tons (1.2 billion bushels), compared to 29.6 (1.09 billion bushels) last year and 30.4 million (1.12 billion bushels) for the 1965-69 period. Yields are higher by almost eight per cent. Durum wheat production in the EEC at about 10 per cent of all wheat production is estimated at 3.4 million tons (124.9 million bushels) compared to 3.1 (113.9 million bushels) last year and the recent five year average of 2.6 million (95.5 million bushels).

In Australia, intentions were to seed about 17.6 million acres, but acreage appears to have been only about 16 million acres, less than the acreage sown in 1970. With no better than average yields anticipated, production is likely to be under 300 million bushels, very similar to last year's production.

Argentina, which had poor weather for planting and harvesting last year, increased seeding to more than 10 million acres in 1971. With the harvest at the end of the calendar year, a continuation of good weather conditions could result in about 225 million bushels (6.1 million metric tons), some 70 million (1.9 million metric tons) more than last year.

World demand

The traditional importing countries will require moderately lower quantities of wheat in 1971-72, although some countries may need to do some rebuilding of stocks. Several countries may also be short of millable wheat while some other countries may wish to increase use of domestic wheat for livestock rather than import coarse grains for this purpose.

World trade

World trade of wheat, which has increased during the past two years, is expected to decline in 1971-72. Exports could be three million tons (110.2 million bushels) below 1970-71 levels of 53 million tons (1.9 billion bushels). Demand in Europe could be three million tons less with increases or decreases in other areas about in balance. With larger supplies available and lower demand than last year, the close of 1971-72 will likely see an increase in world stocks in main countries perhaps by about five million tons (183.7 million bushels). While the 56 million tons (2,058 million bushels) in the hands of the seven major exporters would still be well below the level of two years ago, it appears that world stocks may be climbing again.

To the extent that prices in international trade reflect actual supply and demand conditions throughout the world, pressure from greater supply and less import demand is likely to prevent prices from rising to any great extent.

CANADIAN SITUATION

Canadian Wheat Situation and Outlook

The following is taken from a report on the Canadian wheat situation as prepared by the Economics Branch of the Canada Department of Agriculture, for the Canadian Agricultural Outlook Conference, November 22 and 23, 1971.

Situation 1970-71. — Stocks of wheat in Canada at July 31, 1970 were 1,009 million bushels, the highest stock figure on record. This was the fourth consecutive year of increase and the first time that stocks reached the billion bushel mark. However, the 1970 wheat crop, under the L.I.F.T. program, was just less than half the harvest of the preceding year. Acreage in 1970 for all wheat in Canada, 12.5 million acres, was half 1969's acreage and yields were down slightly to 26.6 bushels per acre, compared with the unusually high yield of 27.4 in 1969. At 332 million bushels, the 1970 crop was the lowest since the 283 million in the drought stricken year of 1961. Thus, supplies were reduced by nearly 200 million bushels from 1969-70 to 1,340 million.

In 1970-71, farmers marketed 387 million bushels of wheat compared with 421 million in 1969-70. Commercial domestic utilization of wheat in 1970-71 was very slightly lower than last year with Canadian Wheat Board domestic figures at 115 million compared with 119 million bushels in 1969-70. This was more than offset by the increase in seed requirements. Wheat shipments under feed freight assistance are up more than six million bushels over the 1969-70 crop year figure. With little change in food requirements, total domestic utilization for 1970-71 should be about the same as for 1969-70.

Exports in 1970-71 were sharply higher at 409 million bushels for wheat and the equivalent of about 25 million bushels in flour. This was an increase of 25 per cent over 1969-70 levels of 347 million bushels and was exceeded only by the three years of 1963-64, 1965-66 and 1966-67. Exports for the first nine months indicated particular increases to West Germany, the Netherlands, Algeria, South Africa, the UAR, the People's Republic of China, India, Syria, Turkey, Korea, Brazil and Peru. In June, the sale of about 130 million bushels to the U.S.S.R. was announced. Most of this wheat is to be shipped in 1971 and the early part of 1972. Stocks at July 31, 1971, the end of the crop year are likely to be down to 725,750 million bushels from just over one billion to start the crop year.

Canadian Wheat Board asking prices for wheat were relatively low at the start of the year. No. 1 Northern at Thunder Bay was \$1.72 in August 1970 but by the end of 1970 had climbed ten cents to \$1.82. (Feed wheat prices strengthened in the fall of 1970 from \$1.42 to \$1.57 and in the later months of the crop year were \$1.62). Some reductions occurred again, particularly in May, but at the end of the crop year prices were again over \$1.80. Initial prices to producers for 1971-72 were established in the late winter of 1970-71 at \$1.46, basis in store Thunder Bay or Vancouver, for the new wheat grade No. 1 Canada Western Red Spring Wheat. Prices in August and early September 1971 had dropped back to about \$1.75 for No. 1 Northern or \$1.74 for No. 1 Canada Western Red Spring 14 per cent.

Durum production in Canada decreased from 83 million bushels in 1969 to 81 million in 1970. Manitoba and Saskatchewan production were each lower by nearly two million bushels, but Alberta production was slightly higher on a larger acreage. Exports of durum in the 1970 calendar year were 24.5 million bushels compared with 17 million bushels in 1969. However, total disposition of about 35 million bushels was far short of production. Prices of durum wheat followed fairly closely the price of No. 1 Northern climbing to \$1.81 in October and maintaining this price range,

except for a period of somewhat lower prices in the spring.

Wheat acreage for Canada for harvest in 1971 increased to 19.2 million acres, about 54 per cent over 1970 but still only two-thirds of average acreage for the 1960-69 period. Saskatchewan increased acreage by 60 per cent to 12.8 million acres; Manitoba by 71 per cent to 2.4 million acres and Alberta by 35 per cent to 3.5 million. Contained in these totals is 2.46 million acres in durum, some 600 thousand less than in 1970.

The September forecast by Statistics Canada for wheat production in 1971 indicates a total crop of 522 million bushels — an increase of 57 per cent over 1970. With stocks reduced to 750 million bushels to start the crop year, supplies are down from last year by 70 million bushels to 1,271 million. This is the lowest supply in the last four years, but higher than any of the preceding years. Durum production is forecast at just over 60 million bushels, down at least 25 per cent from production in the last two years. Ontario winter wheat production is forecast at 13.9 million, down by two million bushels from last year and the smallest crop in six years.

All three western provinces had acreage and production increases in 1971. Saskatchewan reached 342 million bushels in 1971 compared with 210 million in 1970 and 537 million in the peak year of 1966. The Alberta crop increased from 72 million bushels in 1970 to 90 million in 1971. Manitoba's production more than doubled from 30 million bushels in 1970 to 70 million in 1971. Spring wheat production in British Columbia rose from 2 million bushels to 3.9 million; in Quebec there was an increase to 1 million; a slight increase to 138,000 bushels occurred in New Brunswick; Nova Scotia and Prince Edward Island produced 155,000 and 180,000 bushels, respectively.

Outlook 1971-72 — Canadian production. — In Canada, without the 1970 LIFT program, acreage increased in 1971 by 6.7 million acres to 19.2 million. This is still well below the five year average, 1964-65 to 1968-69 of 29.4 million acres. All Prairie provinces had larger acreages with the main increase in Saskatchewan — 4.8 million acres to a total of 12.8 million acres. Acreages in Manitoba increased by one million to 2.4 million acres; Alberta increased by .9 million to 3.5 million acres.

Yields for Canada were up in 1971 at 27.2 bushels per acre from 26.6 bushels per acre in 1970. Manitoba's average yield was 29.2 bushels per acre, an increase of over 34 per cent. Saskatchewan's average yield — 26.7 bushels per acre and Alberta's yield was 26.3 bushels per acre, down 1.4 bushels from 1970.

Production of all wheat in Canada on October 20, 1971 as estimated by Statistics Canada was 523.7 million bushels (14.3 million metric tons) up 58 per cent from last year. Stocks are down this year by 259 million bushels (7.1 million metric tons) to 750 million bushels (20.4 million metric tons). Total supplies of wheat are down for the 1971-72 crop year for the second straight time from 1,340 million bushels (36.5 million metric tons) for the 1970-71 crop year to 1,273 million bushels (34.7 million metric tons).

Durum production is estimated at 60.5 million bushels this year compared to over 80 million bushels in each of the last two years. This year 2.46 million acres were seeded — 20 per cent less than in 1970. Ontario winter wheat with lower acreage and yield is estimated at 14.0 million bushels, down by 1.6 million from 1970.

Canadian supply

The total Canadian carryover, nearly 750 million bushels, could fall to less than 700 million bushels by July 31, 1972 since disposition would exceed production by about 60 million bushels.

Canadian trade

New sales opportunities abroad for Canadian wheat will be more difficult in 1971-72 than in the crop year recently ended. Traditional exporters will be competing strongly for markets. The general decline in the world market could be offset by the potential imports of Russia and China. In addition, the federal government's expanded credit program has been facilitating sales to developing countries and fairly sizeable quantities have been donated under Aid programs. For the opening months of the 1971-72 crop year the rate of overseas clearances are running at high levels, compared with 1970-71. Sizeable quantities of wheat, previously contracted for by the People's Republic of China and by Russia, have been shipped or are being shipped in the 1971-72 crop year. While the position of further contracts is unclear at present, it appears that total exports are likely to reach or surpass the 435 million bushels exported in 1970-71.

Disposition on domestic markets including wheat for food, feed and seed could run about the same or a little lower than the 156 million last year if corn and barley partially replace wheat for feed. Total disposition of wheat for Canada in 1971-72 could therefore run around 585 million bushels.

The world situation so far in 1971-72 seems to be more typical of what may be expected in the future than was the case in 1970-71. Subsidies and other incentives exist in many countries, particularly in Europe, for high domestic production. These appear likely to be more widespread than in the past as plans go forward to expand the EEC. Only a few major consuming countries such as Japan are not attempting to increase their own self sufficiency in bread grains. On the other hand, the major producing countries such as Canada, the U.S.A., Australia, Argentina and France have unused productive capacity which could be quickly utilized to sharply increase production. For 1972-73, many unforeseeable factors can intervene to influence requirements of importing countries. With normal circumstances, world demand is not expected to increase in 1972-73. Canadian exports could be expected to range from 375 to 425 million bushels in 1972-73, provided that Russia and the People's Republic of China buy as much wheat in the new year as they did in the past.

Total Canadian disposal of wheat in 1972-73 can be estimated approximately the same as last year at 550 million bushels or more. An acreage for spring planting in 1972 would likely provide adequate production to meet export and domestic needs without changing the stock position very much. A more accurate estimate of required acreage can be made in the late winter of 1972.

Canadian prices

Initial payments for the 1971-72 crop are virtually unchanged from 1970-71 at \$1.46 per bushel for the new grade No. 1 Canada Western (basis Thunder Bay or Vancouver). This is the same price prevailing in 1970-71 for No. 2 Northern. In the first two months of the 1971-72 crop year asking prices had fallen from about \$1.80 for No. 2 Northern in the last week of July to \$1.66 in the first full week of October.

Winter and durum wheat

In 1972 some increase in Ontario winter wheat production will likely occur even if acreage is not increased very much since yields were low in 1971.

With durum wheat, the production in 1971 of 60.5 million bushels appears about equal to the domestic use of about 12 million bushels and the unusually high exports of about 50 million bushels last year. If stocks in Canada are about 100 million bushels, as has been unofficially estimated, 2.46 million acres in 1972 would likely produce 60 million bushels. This would likely meet domestic and export needs without reducing stocks.

Supplies Decline from Year Ago Total estimated supplies of wheat for the 1971-72 (August-July) crop year are placed at 1,273.2 million bushels consisting of the August 1 carryover of 749.5 million and the 1971 crop, now estimated on the basis of conditions at October 20, at 523.7 million bushels. Supplies of the size indicated represent a decrease of 5 per cent from the 1,340.2 million bushels of 1970-71. After making an allowance of 157.0 million bushels for anticipated domestic requirements, supplies available for export and for carryover during 1971-72 amount to 1,116.2 million, 6 per cent less than the 1,184.9 million in 1970-71.

Canadian Wheat Supplies

Item	1970-71 ^r	1971-72 ^p
	million bushels	
Carryover in North America at beginning of crop year (August 1)	1,008.7	749.5
Production	331.5	523.7(1)
Total estimated supplies	1,340.2	1,273.2
Less estimated domestic requirements for crop year ...	155.3	157.0 ^r
Available for export and for carryover	1,184.9	1,116.2
<u>Deduct</u>		
Exports of wheat in bulk, August-October(2)	124.4	152.4
Exports of seed wheat, August-October(3)	0.3	0.4
Total exports of wheat as grain	124.7	152.8
Exports of wheat flour in terms of wheat, August - October(3)	6.5	7.9
Total exports of wheat and wheat flour	131.2	160.8
Balance on November 1 for export and for carryover ...	1,053.7	955.4

- (1) Based on November forecast of production.
- (2) As reported by the Canadian Grain Commission.
- (3) Customs returns, 1970-71 adjusted for time lag.

Exports Higher
than Previous Year

Exports of the wheat and flour, in terms of wheat equivalent, during August-October 1971 amounted to 160.8 million bushels, some 22 per cent above the 131.2 million exported during the same three months of 1970. This year's exports consisted of 152.4 million bushels of wheat in bulk, 396 thousand of seed and 7.9 million of flour in terms of wheat. During the August-October period last year these figures were 124.4 million of wheat in bulk, 308 thousand of seed and 6.5 million of flour in wheat equivalent. The balance remaining on November 1, 1971 for export and for carryover amounted to 955.4 million bushels, 9 per cent below the November 1, 1970 total of 1,053.7 million.

Marketing, Disappearance
and Visible Supplies

Total primary deliveries of wheat (both east and west) up to November 10 of the current crop year have amounted to 167.6 million bushels in sharp contrast to the 75.5 million marketed during the same period of the previous year. Some 53.3 million bushels of this year's total were delivered during the four weeks October 14 to November 10. During the same period the volume of Canadian wheat entering domestic and export channels amounted to 57.4 million bushels. As a result, the total visible supply of Canadian wheat decreased from 313.1 million at October 13 to a level of 309.1 million at November 10, 1971.

The total visible supply of Canadian wheat at November 10 this year represented an 18 per cent decrease from the 1970 comparable total of 376.0 million and was 31 per cent less than the 1969 figure of 449.1 million. Country elevator stocks, amounting to 178.8 million bushels, were also below both the 1970 comparable total of 240.7 million, and the 275.2 million of two years ago. Wheat stocks at interior terminals at November 10, 1971, totalled 6.6 million bushels also lower than both the 10.9 million of 1970 and the 12.2 million of 1969. The 18.9 million bushels "in transit rail" (western division) were 30 per cent above the 1970 figure of 14.5 million and 54 per cent greater than the 12.2 million in this position in 1969. Supplies at the Lakehead, totalling some 20.6 million bushels, registered declines from both last year's comparable level of 23.1 million and the 40.9 million of 1969. Stocks "in transit lake", amounting to 5.5 million bushels were 11 per cent below the 1970 level of 6.2 million and 24 per cent less than the 1969 figure of 7.3 million. The 37.4 million bushels in Bay, Lake and Upper St. Lawrence ports were little changed from 37.6 million of a year ago and smaller than the 39.2 million of two years ago. Supplies in Lower St. Lawrence and Maritime ports at November 10, 1971, at 30.7 million bushels, registered an increase of 6 per cent over the 29.0 million of a year ago but were 27 per cent less than the 42.3 million at the same date in 1969. The 4.9 million bushels in West Coast ports (Vancouver-New Westminster, Prince Rupert and Victoria) were smaller than both the 5.8 million at November 11, 1970 and the 10.0 million at the comparable date in 1969.

November 1971 Exports of
Wheat and Flour Total
62.3 Million Bushels

Combined exports of wheat in bulk, seed wheat and wheat flour in terms of grain equivalent during November 1971 amounted to 62.3 million bushels, 29 per cent more than the September 1971 total of 48.4 million, 30 per cent, above the October 1970 figure of 48.0 million and a 59 per cent increase over the ten-year (1960-69) average for the month of October of 39.2 million.

Exports of wheat in bulk during October 1971 (as reported by the Canadian Grain Commission), amounted to 59.4 million bushels, registering increases over the September 1971 exports of 44.5 million, the October 1970 total of 44.4 million and the ten-year average for the period of 36.4 million. Exports of seed wheat

during October 1971 based on Canadian Customs returns, amounted to 136 thousand bushels compared with the October 1970 total (adjusted to remove time lag) of 84 thousand bushels. Customs returns also indicate that the equivalent of 2.8 million bushels of wheat was exported in the form of flour during October 1971, below the September 1971 figure of 3.7 million, the October 1970 total (adjusted for time lag) of 3.5 million and unchanged from the ten-year average of 2.8 million.

Cumulative exports of wheat in bulk during the August-October period of the current crop year amounted to 152.4 million bushels, 23 per cent above the 124.4 million shipped during the first three months of the 1970-71 crop year and 46 per cent more than the average for the period of 104.2 million. Britain and the People's Republic of China were the leading markets for wheat in bulk during the first three months of the current crop year with shipments amounting to 34.7 million and 30.4 million bushels, respectively, and accounted for a combined 43 per cent of the August-October total in sharp contrast to the 15 per cent of the previous year's total. Other principal markets for Canadian wheat during the period under review with last year's corresponding figures in brackets, were as follows, in millions of bushels: Japan, 15.1 (10.1); India, 10.7 (15.1); Brazil, 10.3 (9.9); Britain, 7.6 (16.8); Netherlands, 6.5 (1.1); Syria, 6.2 (5.2); and Italy, 6.1 (3.8). Cumulative exports of seed wheat during August-October of the current crop year, based on Canadian Customs returns, amounted to 396 thousand bushels compared with last year's comparable total (adjusted to remove time lag) of 308 thousand.

Cumulative exports of wheat flour during the first three months of the 1971-72 crop year, based on Customs returns, were the equivalent of 7.9 million bushels of wheat, 21 per cent above the comparable 1970-71 figure of 6.5 million bushels (adjusted for time lag) and unchanged from the ten-year average for the period of 7.9 million.

Exports of wheat flour by countries for August-October 1971, based on Customs data, are not available.

Provisional Board for
Grains Institute
Appointed

On November 12, 1971 a joint press release from The Canadian Wheat Board and The Canadian Grain Commission stated that the appointment of the provisional board of directors for the new Canadian Grains Institute was announced by the Canadian Wheat Board and the Canadian Grain Commission.

The new Grains Institute, with provision for approximately 60 Canadian and foreign participants, will provide practical courses on every aspect of grain marketing, handling, transportation and processing, with the view to promote the increased utilization of Canadian grain abroad.

C.L. Shuttleworth, Assistant Chief Commissioner of the Canadian Grain Commission, was appointed chairman of the provisional board and R.L. Kristjanson, Commissioner of the Wheat Board, was appointed co-chairman.

Other members of the five-member board are: J. McNaught, member of the Grains Group, Ottawa; Dr. J. Hlynka, Assistant Director, Grain Research Laboratory, of the Canadian Grain Commission; and S.D. Kilimnik, Special Assistant to the Executive Director, the Canadian Wheat Board. Mr. Kilimnik will act as secretary for the Grains Institute Board.

The new board will have the responsibility to establish the general policies for the Grains Institute. One of its first tasks will be the selection and appointment of a permanent Institute Director. Advertisements for the position will be placed in the major newspapers across Canada within a few days.

The new Institute will be located in the Canadian Grain Commission's new building that is presently under construction on Main Street, just south of Portage Avenue. In addition to classroom facilities and teaching laboratories, the new Institute will have facilities to demonstrate commercial milling and baking processes, oilseeds extraction methods and feed processing techniques.

Farmers' Marketings Deliveries of wheat from farms in the Prairie Provinces up to November 10 of the current crop year amounted to 163.0 million bushels, substantially more than both the August 1 - November 11, 1970 total of 69.4 million and the ten-year (1960-69) average for the period of 109.5 million bushels.

Farmers' Marketings (1) of Wheat in the Prairie Provinces 1971-72

Week ending		Manitoba	Saskatchewan	Alberta	Total	Last year
		bushels				
August	11, 1971	19,280	280,376	2,868	302,524	64,029
	18	45,222	1,364,384	7,688	1,417,294	45,524
	25	1,140,677	3,962,606	917,899	6,021,182	97,747
September	1	1,054,714	7,856,529	2,314,028	11,225,271	6,693,462
	8	1,237,858	10,812,860	2,156,484	14,207,202	7,017,382
	15	1,372,703	14,911,298	4,318,710	20,602,711	8,178,772
	22	2,698,575	10,590,451	2,984,025	16,273,051	10,982,349
	29	1,648,043	6,921,017	2,356,118	10,925,178	7,094,969
October	6	2,099,756	11,014,624	1,582,732	14,697,112	6,522,669
	13	2,052,588	9,821,569	2,141,418	14,015,575	4,105,321
	20	1,600,362	7,695,414	1,906,736	11,202,512	4,360,018
	27	1,987,212	11,150,867	1,523,677	14,661,756	4,607,693
November	3	2,457,525	11,934,610	1,313,469	15,705,604	2,872,360
	10	1,165,718	7,777,345	2,757,438	11,700,501	6,744,460
Totals		20,580,233	116,093,950	26,283,290	162,957,473	69,386,755
Average similar						
period: 1960-69		14,801,542	69,211,591	25,534,297	109,547,430	

(1) Includes receipts at primary, process and interior terminal elevators.

Canada's 1971 Wheat Crop
Estimated at 523.7
Million Bushels

Based on conditions at October 20, Canada's 1971 wheat crop now estimated at 523.7 million bushels, is 58 per cent above last year's 331.5 million bushels but 14 per cent below the ten-year average of 609.5 million bushels.

The increase in production compared with last year is due to a 2 per cent increase in yields and a 54 per cent increase in seeded acreage. The average yield at 27.2 bushels per acre is 24 per cent above the ten-year (1960-69) average of 22.0 bushels per acre. This year's all Canada crop of spring wheat, including durum, is estimated at 509.7 million bushels compared with the 1970 crop of 315.9 million and the ten-year average of 593.3 million bushels. Ontario's winter wheat crop is estimated at 14.0 million bushels, a decrease of 10 per cent from last year's crop of 15.6 million.

In the Prairie Provinces the 1971 wheat crop is now placed at 504.0 million bushels, some 191.5 million bushels or 61 per cent above the 1970 crop of 312.5 million bushels. Production in Saskatchewan, accounts for 65 per cent of this year's all Canada wheat crop and is estimated at 342.0 million bushels, some 63 per cent more than last year's 210.0 million bushels. The Alberta crop, estimated at 92.0 million bushels, is up 28 per cent from last year's production of 72.0 million while the Manitoba crop of 70.0 million is 130 per cent larger than the 1970 outturn. The indicated average yield per seeded acre in the Prairie Provinces is 27.0 bushels, with Manitoba averaging 29.2, Saskatchewan 26.7 and Alberta, 26.3 bushels per acre. Current estimates of production in the Prairie Provinces include relatively small quantities of winter wheat principally in Alberta, and an estimated 60.5 million bushels of durum wheat.

November Estimate of the 1971 Production of Spring and Winter Wheat in Canada
Compared with 1970

Crop	Area		Yield per acre		Production	
	1970	1971	1970	1971(1)	1970	1971(1)
	acres		bushels		bushels	
<u>CANADA</u>						
Spring wheat(2) ..	12,129,000	18,889,000	26.0	27.0	315,935,000	509,692,000
Winter wheat	355,000	339,000	43.9	41.3	15,584,000	14,001,000
All wheat	12,484,000	19,228,000	26.6	27.2	331,519,000	523,693,000
<u>PRAIRIE PROVINCES</u>						
Manitoba	1,400,000	2,400,000	21.8	29.2	30,500,000	70,000,000
Saskatchewan	8,000,000	12,800,000	26.2	26.7	210,000,000	342,000,000
Alberta	2,600,000	3,500,000	27.7	26.3	72,000,000	92,000,000
Totals(2)	12,000,000	18,700,000	26.0	27.0	312,500,000	504,000,000

(1) As indicated on basis of conditions on or about October 20.

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

Note: All estimates are field-run basis.

Durum wheat. - The acreage in durum wheat in the Prairie Provinces in 1971 was 20 per cent smaller than that seeded in 1970, and average yields estimated at 24.6 bushels per acre, are 7 per cent below the 1970 figure of 26.4 bushels. The latest estimate is 60.5 million bushels, compared with the 1970 crop of 80.9 million. Estimated production by provinces, in millions of bushels, is as follows: Manitoba, 4.0 Saskatchewan, 49.0 and Alberta 7.5.

November Estimate of the 1971 Production of Durum Wheat(1)
in the Prairie Provinces Compared with 1970

Province	Area		Yield per acre		Production	
	1970	1971	1970	1971(2)	1970	1971(2)
	acres		bushels		bushels	
Manitoba	115,000	150,000	20.9	26.7	2,400,000	4,000,000
Saskatchewan	2,500,000	2,000,000	26.4	24.5	66,000,000	49,000,000
Alberta	450,000	310,000	27.8	24.2	12,500,000	7,500,000
Totals	3,065,000	2,460,000	26.4	24.6	80,900,000	60,500,000

(1) Acreage and production included with spring wheat.

(2) As indicated on the basis of conditions on or about October 20.

Wheat Shipments from
Churchill During
1971 Season

Shipments of wheat from the port of Churchill during the 1971 season of navigation amounted to 20.6 million bushels compared with last year's figure of 23.6 million and ten-year 1960-69 average of 21.7 million.

Ocean Shipments of Wheat from Churchill Season of Navigation, 1933-71

Year	Wheat	Year	Wheat
	thousand bushels		thousand bushels
1933	2,708	1952	8,585
1934	4,050	1953	10,784
1935	2,407	1954	12,485
1936	4,294	1955	13,078
1937	604	1956	16,250
1938	917	1957	16,577
1939	1,772	1958	19,599
1940	—	1959	21,787
1941	—	1960	19,582
1942	—	1961	19,353
1943	740	1962	21,525
1944	—	1963	22,864
1945	—	1964	21,645
1946	2,929	1965	24,707
1947	4,976	1966	21,817
1948	5,314	1967	20,639
1949	5,528	1968	22,516
1950	6,768	1969	21,873
1951	7,278	1970	23,551 ^r
		1971	20,570

Licensed Storage Capacity
of Canadian Grain Elevators

Total licensed grain storage capacity as at August 1, 1971, according to records of the Canadian Grain Commission, amounted to 693.9 million bushels. Storage capacity in the 4,849 primary elevators in the Western

Division accounted for 394.0 million bushels and represented 57 per cent of the total. Most of the remainder was accounted for by the storage capacity of terminal elevators, 153.0 million bushels, and transfer elevators, 130.5 million.

On a regional basis, storage capacity amounting to some 436.6 million bushels and accounting for 61 per cent of the total, was located in the Prairie Provinces.

Licensed Storage Capacity (1) of Canadian Grain Elevators
as at August 1, 1971

Province Number and capacity	Primary	Terminal	Process	Transfer	Total licensed elevators
<u>Manitoba</u>					
Number	616	1	9	—	626
Capacity	50,983,250	5,000,000	5,984,300	—	61,967,550
<u>Saskatchewan</u>					
Number	2,667	2	4	—	2,673
Capacity	208,103,600	11,000,000	3,231,500	—	222,335,100
<u>Alberta</u>					
Number	1,543	3	9	—	1,555
Capacity	131,920,800	6,100,000	4,280,000	—	142,300,800
<u>British Columbia</u>					
Number	23	7	1	—	31
Capacity	2,986,000	28,318,500	18,300	—	31,322,800
<u>Ontario</u>					
Number	—	22	1	15	38
Capacity	—	102,597,210	2,888,900	53,150,000	158,636,110
<u>Quebec</u>					
Number	—	—	—	10	10
Capacity	—	—	—	69,107,000	69,107,000
<u>Maritimes</u>					
Number	—	—	—	4	4
Capacity	—	—	—	8,229,300	8,229,300
<u>Totals</u>					
Number	4,849	35	24	29	4,937
Capacity	393,993,650	153,015,710	16,403,000	130,486,300	693,898,660

Source: Canadian Grain Commission.

(1) Capacity in terms of bushels

General Quotas 1971-72 as at Monday, Nov. 8, 1971 Canadian National Railway Blocks

No.	Name	Wheat (All Others)				Durum		Oats		Barley		
		A(1)	B	C	D	A	B	A	B	A	B	C
bushels per quota acre												
01	Winnipeg N.	2	2			5				5(1)	5	
03	Winnipeg S.	2	2			5				5(1)	5	
05	Winnipeg W.	2	2			5				5(1)	5	
07	Brandon N.	2	2			5				5(1)	5	
09	Brandon W.	2	2			5				5(1)	5	
11	Melville	2	2			5				5(1)	5	
13	Dauphin	2	2			5				5(1)	5	
15	Kamsack	2	2			5				5(1)	5	
17	Saskatoon M. ...	2	2			5				5(1)	5	
19	Saskatoon S. ...	2	2			5				5(1)	5	
21	Saskatoon W. ...	2	2			5				5(1)	5	
23	Pr. Albert E. ..	2	2			5				5(1)	5	
25	Pr. Albert S. ..	2	2			5				5(1)	5	
27	Pr. Albert M. ..	2	2			5				5(1)	5	
29	Pr. Albert W. ..	2	2			5				5(1)	5	
31	Regina	2	2			5				5(1)	5	
33	Regina S.	2	2			5				5(1)	5	
35	Regina W.	2	2			5				5(1)	5	
37	Biggar N.	2	2			5				5	5	
39	Biggar W.	2	2			5				5	5	
41	Edmonton N.	2	—			5				5	5	
43	Edmonton S.	2	2			5				5	5	
45	Edmonton W.	2	2			5				5	5	
47	Hanna S.	2	2			5				5	5	
49	Hanna W.	2	2			5				5	5	
90	N.A.R. West	2	—			5				5	—	
98	G.S.L.	2	2			5				5	5	

- (1) On Friday, December 10, 1971 at all delivery points within the noted blocks the "A" Quota for Barley will be terminated.

General Quotas 1971-72 as at Monday, Nov. 8, 1971 Canadian Pacific Railway Blocks

No.	Name	Wheat (All Others)				Durum		Oats		Barley		
		A(1)	B	C	D	A	B	A	B	A	B	C
		bushels per quota acre										
61	Keewatin	2	2			5				5(1)	5	
62	La Riviere ...	2	2			5				5(1)	5	
63	Carberry	2	2			5				5(1)	5	
64	Brandon	2	2			5				5(1)	5	
71	Weyburn	2	2			5				5(1)	5	
72	Pasqua	2	2			5				5(1)	5	
73	Bulyea	2	2			5				5(1)	5	
74	Bredenbury ...	2	2			5				5(1)	5	
75	Saskatoon	2	2			5				5(1)	5	
76	Wilkie	2	2			5				5(1)	5	
77	Assiniboia ...	2	—			5				5(1)	5	
78	Swift Current.	2	2			5				5(1)	5	
79	Outlook	2	2			5				5(1)	5	
81	Medicine Hat .	2	—			5				5	—	
82	Brooks	2	2			5				5	5	
83	Lethbridge ...	2	2			5				5	—	
84	Vulcan	2	2			5				5	5	
85	Calgary	2	2			5				5	5	
86	Red Deer	2	2			5				5	5	
87	Edmonton	2	2			5				5	—	
95	N.A.R. East ..	2	2			5				5	—	
	B.C. Stations.	2	2			5				5	5	

(1) On Friday, December 10, 1971 at all delivery points within the noted blocks the "A" Quota for Barley will be terminated.

Special Quotas 1971-72 as at Monday, November 8, 1971

Hercules Durum	5 bushels per assigned acre	All delivery points
Selected Hercules Durum	1 carlot (60 assigned acres)	All delivery points
Soft White Spring	5 bushels per assigned acre	All delivery points
Alberta Red Winter	2 bushels per assigned acre	All delivery points
Selected oats	50 bushels per assigned acre	All delivery points
Selected barley	50 bushels per assigned acre	All delivery points
Rye	8 bushels per assigned acre	All delivery points
Rye for distilleries	25 bushels per assigned acre	
Flaxseed	5 bushels per assigned acre	All delivery points
Flaxseed for processors	15 bushels per assigned acre	
Rapeseed	5 bushels per assigned acre	All delivery points
Rapeseed (low erucic acid)	10 bushels per assigned acre	All delivery points
Rapeseed for crushers	20 bushels per assigned acre	

Visible Supply of Canadian Wheat, November 10, 1971
Compared with Approximately the Same Date, 1969 and 1970

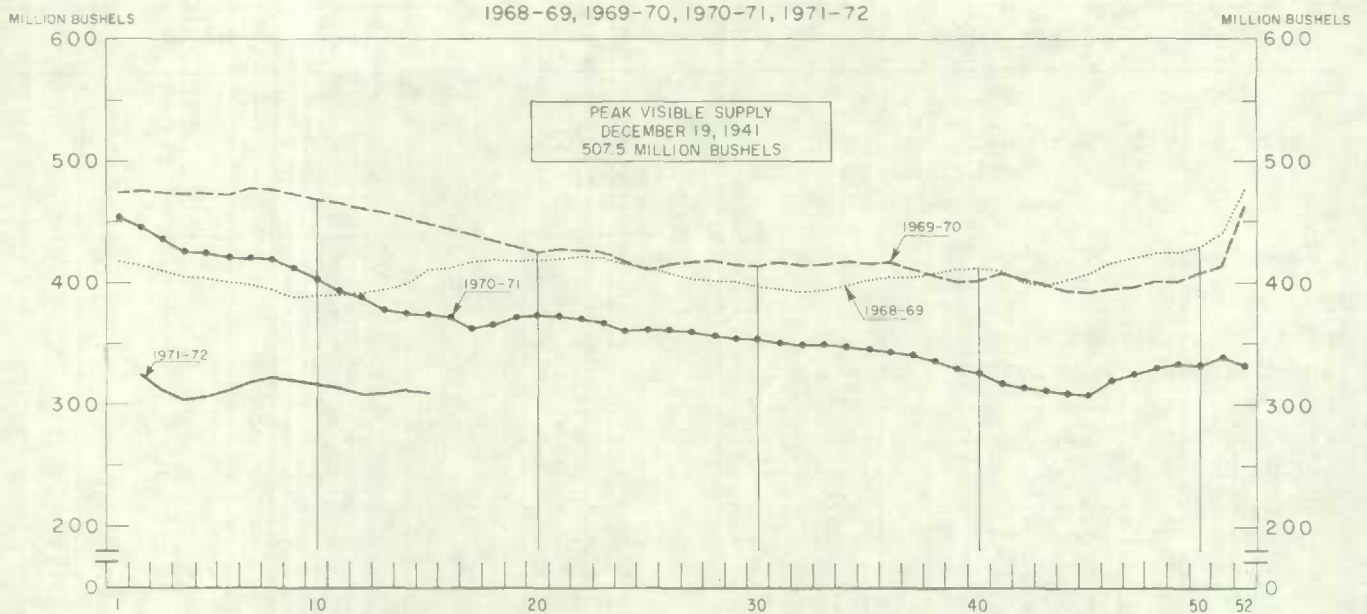
Position	1969	1970	1971
	thousand bushels		
Primary elevators - Manitoba	35,820	24,999	20,860
Saskatchewan	159,845	148,236	108,872
Alberta	79,501	67,475	49,109
Sub-totals	275,166	240,710	178,841
Process elevators	4,495	4,003	3,996
Interior terminals	12,217	10,926	6,617
Vancouver-New Westminster	9,509	5,050	4,110
Victoria	560	464	284
Prince Rupert	947	315	550
Churchill	4,151	2,933	982
Thunder Bay	40,926	23,120	20,592
In transit rail (western division)	12,230	14,512	18,882
Bay, Lake and Upper St. Lawrence ports	39,176	37,560	37,370
Lower St. Lawrence and Maritime ports	42,300	28,987	30,744
In transit lake	7,332	6,230	5,541
In transit rail (eastern division)	52	1,225	534
Totals	449,061	376,035	309,043

Grading of Wheat Inspected, August - October 1971 with Comparisons

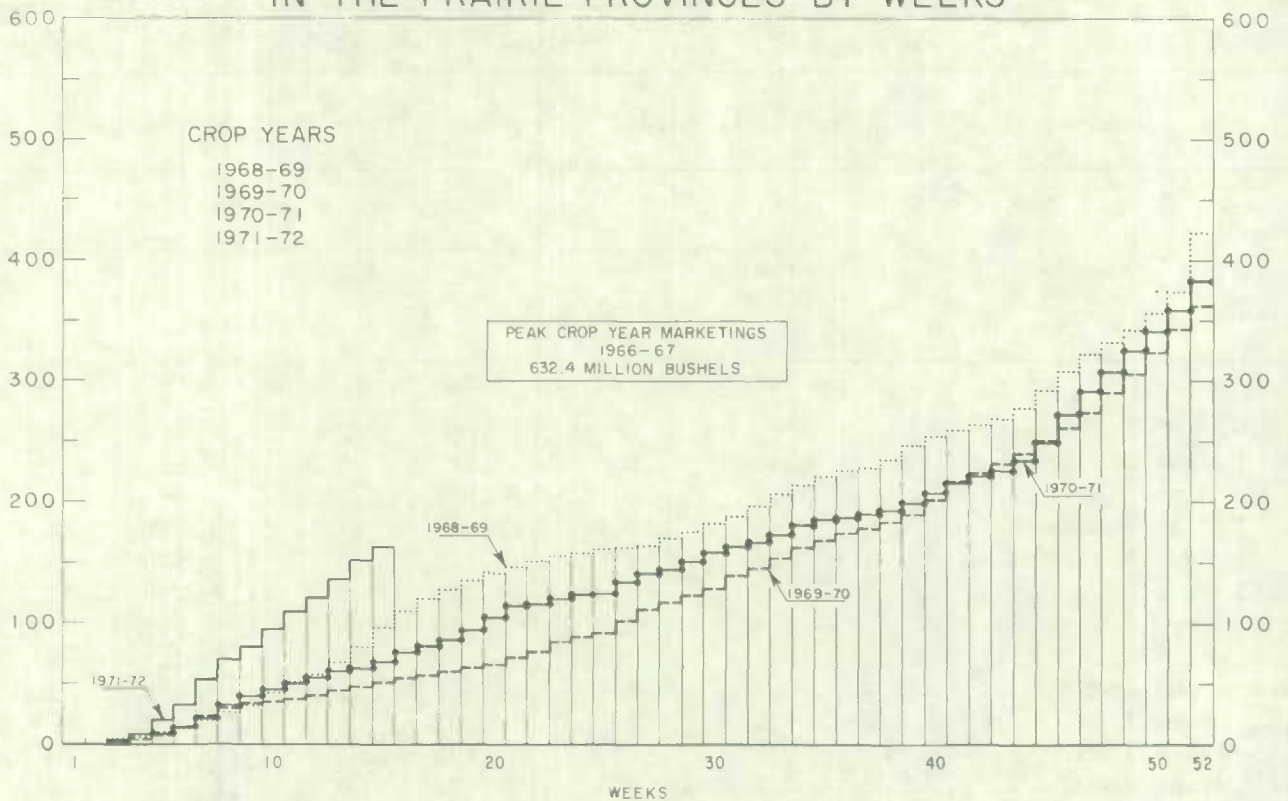
Grade	Crop Year		August - October			
	Average		1970		1971	
	1965-66 1969-70	1970-71				
	per cent	per cent	cars	per cent	cars	per cent
1 C.W. Red Spring	—	—	—	—	59,004	62.4
No. 1 Man. Northern	10.9	6.5	2,287	3.3	—	—
No. 2 Man. Northern	32.7	37.2	20,226	29.5	—	—
No. 3 Man. Northern	19.3	19.8	12,642	18.4	11,158	11.8
No. 4 Man. Northern	8.6	12.0	9,213	13.4	8,549	9.0
No. 5 Wheat	3.3	4.5	5,745	8.4	1,238	1.3
No. 6 Wheat	0.4	0.7	1,026	1.5	113	0.1
Feed Wheat	0.1	0.1	99	0.1	12	(1)
Others Red Spring	18.2	6.2	8,606	12.6	3,414	3.6
C.W. Garnet	0.1	(1)	35	0.1	3	(1)
C.W. White Spring	0.1	0.3	172	0.3	321	0.3
C.W. Mixed Wheat	0.1	0.1	93	0.1	72	0.1
Alberta Winter	0.8	0.8	831	1.2	495	0.5
Nos. 1-6 C.W. Amber Durum ..	4.6	11.4	7,130	10.4	9,842	10.4
Other C.W. Amber Durum	0.9	0.5	452	0.7	408	0.4
Totals	100.0	100.0	68,557	100.0	94,629	100.0
Gross bushels (approx.)			136,302,000			

(1) Less than .05 per cent.

WEEKLY VISIBLE SUPPLY OF CANADIAN WHEAT



CUMULATIVE RECORD OF WHEAT MARKETINGS IN THE PRAIRIE PROVINCES BY WEEKS



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

Lake Shipments of Canadian Grain

Total shipments of the six major grains out of Lakehead terminals from the opening of navigation to November 10 this year amounted to 436.0 million bushels, 14 per cent above the comparable 1970 figure of 384.1 million and 59 per cent more than the 10-year (1960-69) average for the period of 274.2 million. In 1971 the season of navigation opened on April 10 while the 1970 season opened on April 8. Shipments of wheat, at 251.4 million were 13 per cent more than the 1970 figure of 222.6 million bushels and accounted for 58 per cent of the total six grains.

Lake Shipments of Canadian Grain from the Opening of Navigation to November 10, 1971 and to Approximately the Same Date, 1960 to 1970

Year	Wheat	Oats	Barley	Rye	Flaxseed	Rapeseed	Total
thousand bushels							
1960	154,989	22,209	42,057	3,405	7,391	—	230,051
1961	188,741	20,463	36,704	3,841	6,319	—	256,069
1962	128,032	17,708	22,254	4,970	6,372	—	179,336
1963	184,293	37,346	31,571	3,091	5,441	—	261,743
1964	302,907	30,029	35,813	4,902	8,166	59	381,876
1965	242,399	41,099	35,380	3,939	8,799	810	332,426
1966	325,848	25,763	35,685	7,406	11,192	811	406,704
1967	190,485	31,609	57,742	5,265	8,478	862	294,439
1968	150,977	16,375	25,709	2,414	4,636	326	200,437
1969	128,998	16,759	42,621	1,877	7,259	1,178	198,691
1970	222,591	23,550	120,418	2,506	9,979	5,016	384,060
1971	251,450	22,290	132,119	4,401	13,280	12,412	435,951

Rail Shipments of Wheat to Maritime Ports

Rail shipments of wheat to Maritime ports from Bay, Lake and Upper St. Lawrence ports during August-October 1971 amounted to 695,000 bushels in contrast to the August-October 1970 figure of 2,119,000.

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

Origin of shipments	August - October 31, 1970	August 1 - October 31, 1971
bushels		
Port McNicoll	481,492	428,742
Midland, Tiffin	769,025	210,412
Owen Sound	350,415	55,500
Goderich	517,816	—
Totals	2,118,748	694,654

Rail Shipments of Wheat from Thunder Bay 1968-69 - 1971-72

Month	1968-69	1969-70	1970-71	1971-72
		bushels		
August	—	132,953	169,566	181,419
September	23,084	134,054	244,549	195,721
October	57,458	149,076	176,450	128,383
November	101,966	126,319	178,523	
December	44,136	179,384	330,120	
January	131,034	272,300	525,019	
February	99,776	403,541	552,926	
March	153,067	298,335	418,387	
April	79,899	260,918	407,206	
May	108,339	311,200	187,347	
June	120,532	221,999	156,548	
July	137,404	293,745	200,415	
Totals	1,056,695	2,783,824	3,547,056	

Distribution of Rail Shipments of Wheat from Thunder Bay, October 1971

Grade	Prince Edward Island	Nova Scotia	New Brunswick	Quebec	Ontario
		bushels			
1 C.W. Red Spring ...	—	—	—	—	1,998
Feed grades	16,667	26,500	62,000	15,929	1,333
Durum	—	—	—	1,956	2,000
Totals	16,667	26,500	62,000	17,885	5,331

Overseas Exports of Canadian Grain by Ports of Loading, August 1-November 10, 1971 with Comparisons

Port	Wheat(1)	Durum wheat(1)	Oats(1)	Barley	Tye	Flaxseed	Rapeseed
			thousand bushels				
<u>Pacific Seaboard</u>							
Van.-New West	55,124	2,044	—	10,440	1,781	1,335	5,805
Victoria	1,910	—	—	—	—	—	150
Prince Rupert	3,872	—	—	—	—	—	—
<u>Churchill</u>	20,570	—	—	4,918	—	—	—
<u>Thunder Bay Direct</u>	948	624	2,957	757	1,650	4,890	3,189
<u>St. Lawrence</u>							
Montreal	13,789	13,572	—	4,732	—	—	—
Sorel	11,348	—	—	735	—	—	—
Trois-Rivières	6,426	—	—	—	92	—	—
Quebec	7,408	532	—	4,794	102	46	22
Baie Comeau	14,365	1,083	—	14,659	152	566	—
Port Cartier	13,479	641	—	19,681	—	—	—
<u>Maritime</u>							
Halifax	520	—	—	—	—	—	—
Totals	149,762	18,497	2,957	60,717	3,777	6,837	9,167
August 1 — November 11, 1970	124,791	12,199	6,376	56,183	1,429	4,231	5,740

(1) Excluding seed.

Shipments Under
Feed Grain
Assistance Regulations

Freight assistance shipments of wheat from the Prairie Provinces to Eastern Canada and British Columbia during August-October 1971, amounted to 6,500,000 bushels, sharply below the 9,885,000 shipped during the comparable period of 1970. The bulk of the shipments during the current three months under review went to destinations in Quebec with this province accounting for 55 per cent of the total. During August-October last year Quebec accounted for 46 per cent of the total.

Provincial Distribution of Wheat Shipments under the Feed Grain Assistance Regulations
August - October 1971 and 1970

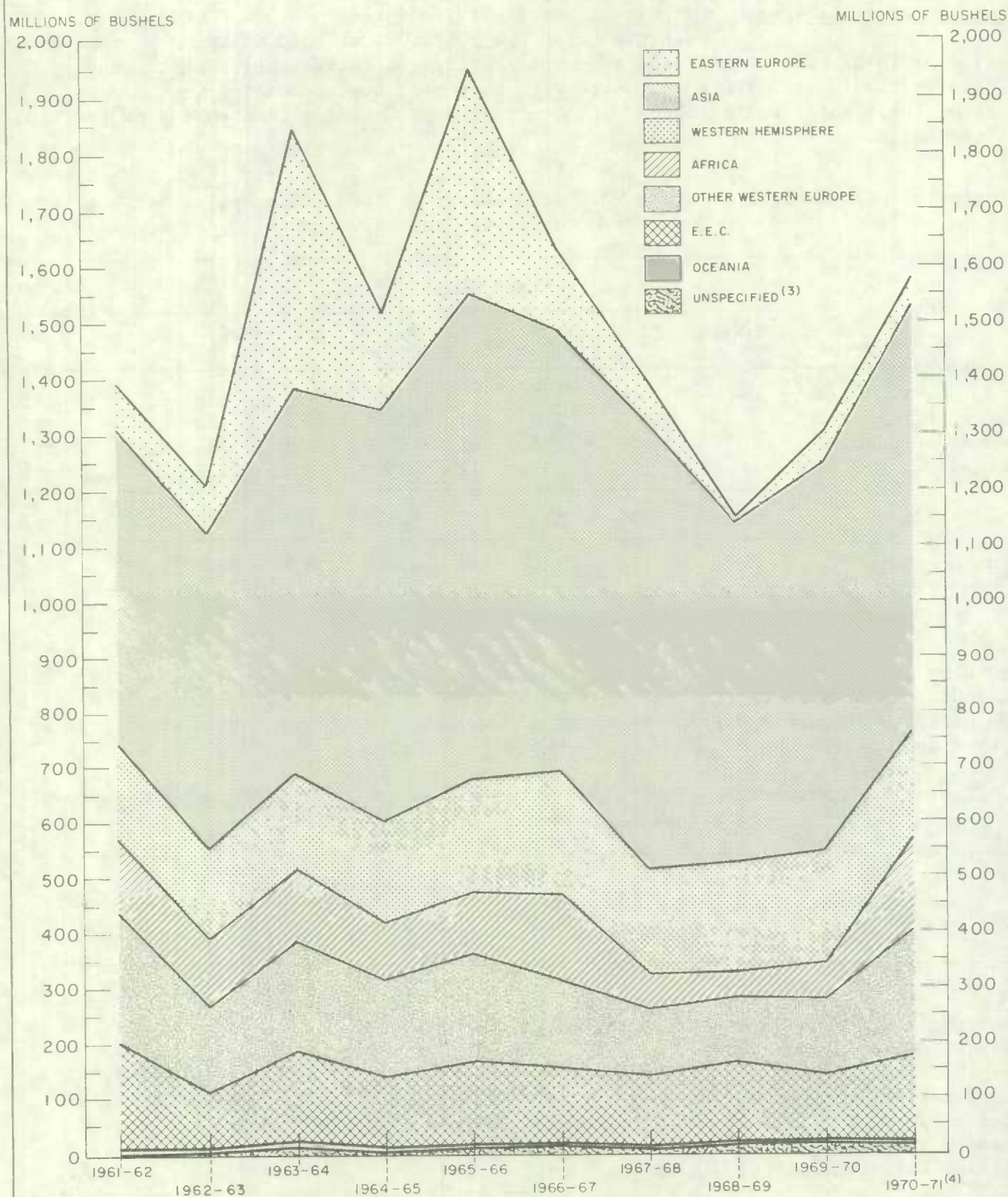
Month	Western Wheat to								Eastern wheat to Quebec
	Nfld.	P.E.I.	N.S.	N.B.	Que.	Ont.	B.C.	Total	
	thousand bushels								
August 1971	49	7	218	90	1,489	359	262	2,473	—
September	65	10	176	123	1,161	250	234	2,019	—
October	67	12	237	72	912	330	378	2,008	—
Totals	180	29	630	285	3,563	939	873	6,500	—
Same months 1970 .	184	56	781	359	4,515	2,921	1,070	9,885	6

Millfeed shipments under the Feed Grain Assistance Regulations indicate the movement of 103,088 tons during August-October 1971, some 12 per cent less than the 116,802 tons shipped during the comparable period of 1970. The greater portion of the millfeed shipments during the three months under review went to destinations in Quebec and Ontario.

Provincial Distribution of Millfeed Shipments under the Feed Grain Assistance
Regulations August - October 1971 and 1970

Province	August - October	
	1970	1971
	tons	
Newfoundland	38	1,148
Prince Edward Island	1,050	880
Nova Scotia	3,172	2,597
New Brunswick	3,396	2,710
Quebec	56,746	53,395
Ontario	43,619	35,713
British Columbia	8,781	6,645
Totals	116,802	103,088

WHEAT⁽¹⁾ SHIPMENTS FROM FOUR MAJOR EXPORTERS⁽²⁾ BY REGIONS 1961-62 TO 1970-71



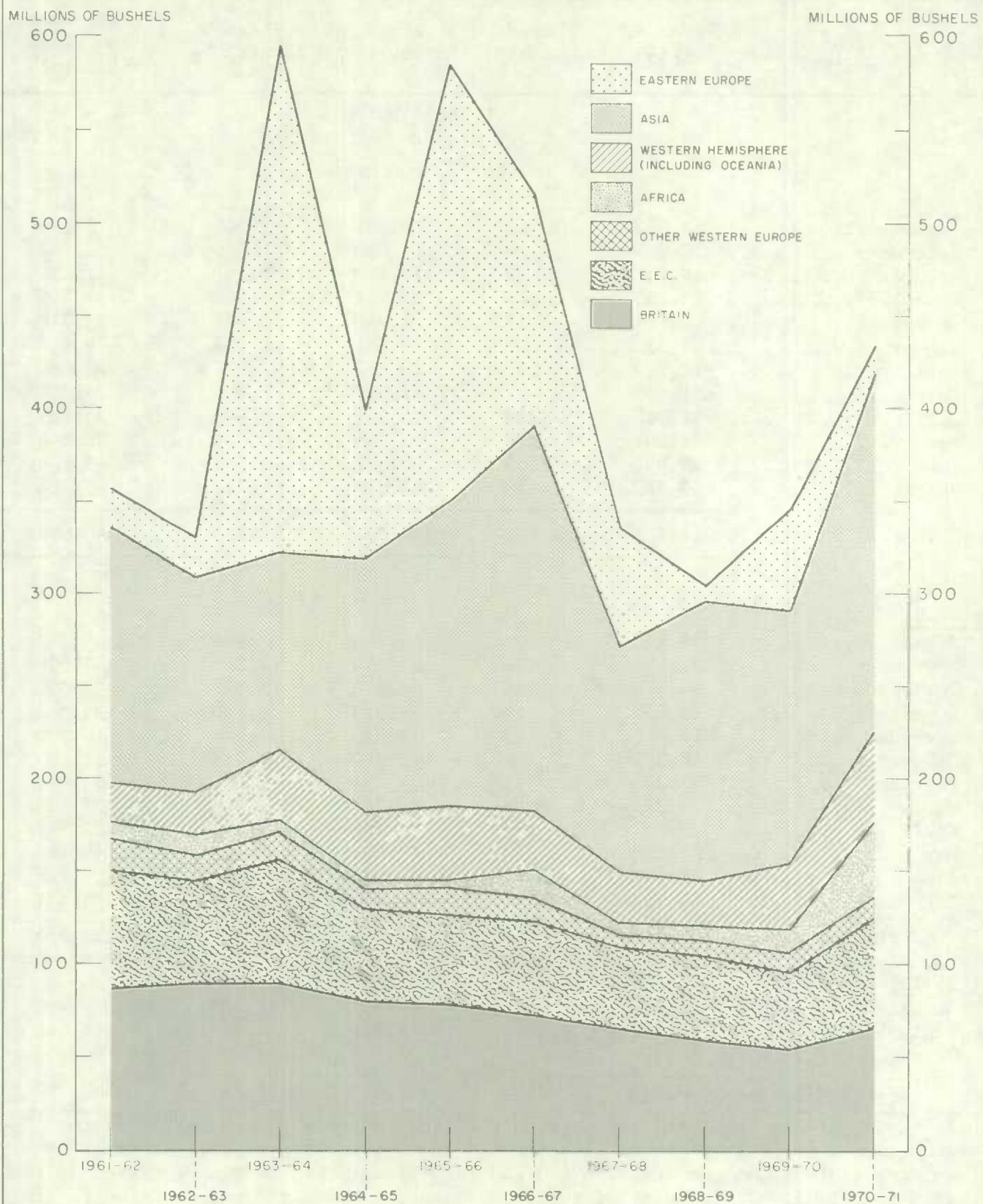
(1) INCLUDES FLOUR AS WHEAT EQUIVALENT.

(3) INCLUDES SHIPMENTS UNDER RELIEF PROGRAMMES.

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

(4) PRELIMINARY.

CANADIAN WHEAT AND FLOUR EXPORTS BY REGIONS 1961-62 TO 1970-71



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>1969-70</u>					
August	13,012	60	13,071	2,306	15,378
September	20,949	74	21,023	1,219	22,242
October	18,838	2	18,840	2,231	21,071
November	22,835	116	22,951	1,863	24,814
December	22,294	52	22,346	2,434	24,779
January	26,351	87	26,438	2,524	28,962
February	18,597	290	18,887	2,077	20,964
March	21,958	499	22,457	2,600	25,057
April	32,913	334	33,247	2,440	35,687
May	36,047	157	36,204	2,443	38,648
June	39,898	103	40,001	3,103	43,104
July	44,010	59	44,070	1,725	45,794
Totals	317,703	1,832	319,535	26,963	346,498
<u>1970-71</u>					
August	44,765	103	44,868	699	45,567
September	35,194	120	35,315	2,306	37,620
October	44,412	84	44,496	3,543	48,039
November	33,307	71	33,378	2,126	35,504
December	18,016	43	18,059	1,444	19,502
January	18,882	2	18,884	2,725	21,609
February	23,334	77	23,411	2,421	25,832
March	20,293	93	20,386	1,900	22,286
April	20,951	157	21,108	1,855	22,963
May	47,631	49	47,681	1,815	49,495
June	47,904	71	47,975	2,154	50,129
July	54,750	100	54,850	1,988	56,839
Totals	409,440	971	410,410	24,975	435,385
<u>1971-72(4)</u>					
August	48,530	26	48,557	1,526 _r	50,083 _r
September	44,520	234	44,754	3,662 _r	48,416 _r
October	59,356	136	59,492	2,759	62,250
Totals	152,406	396	152,803	7,947	160,750

(1) Export clearances including shipments to the United States compiled by the Economics and Statistics Division of the Canadian Grain Commission. (2) Compiled from Canadian Customs returns, 1969-70 and 1970-71 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) Subject to revision.

Exports of Canadian Wheat and Wheat Flour by Destination, Crop Years 1970-71 and 1969-70

Destination	Wheat(1)	Durum wheat(1)	Wheat flour(2)	Total wheat(1) and wheat flour(2)	Total same period last year
bushels					
<u>Western Europe</u>					
EEC:					
Belgium and Luxembourg	7,923,395	553,906	38,610	8,515,911	9,059,189
France	1,067,408	810,461	115	1,877,984	2,887,111
Germany, West	15,602,583	7,041,069	1,106	22,644,758	9,720,169
Italy	7,713,825	7,857,060	16,560	15,587,445	12,164,345
Netherlands	7,007,857	1,946,122	722	8,954,701	7,128,215
Sub-totals	39,315,068	18,208,618	57,113	57,580,799	40,959,029
Other Western Europe:					
Austria	—	410,829	—	410,829	403,147
Britain	63,700,671	688,546	2,089,465	66,478,682	54,694,951
Denmark	58,783	—	—	58,783	48,160
Gibraltar	—	—	8,115	8,115	8,115
Greece	—	—	37,315	37,315	60,621
Ireland	2,178,680	58,521	—	2,237,201	900,848
Malta and Gozo	327,712	925,867	46	1,253,625	695,519
Norway	3,657,048	112,187	115	3,769,350	3,593,445
Portugal	—	—	26,906	26,906	895,375
Spain	3,125	—	1,840	4,965	9,246
Sweden	58,820	—	—	58,820	76,264
Switzerland	3,021,241	1,941,108	—	4,962,349	4,118,303
Sub-totals	73,006,080	4,137,058	2,163,802	79,306,940	65,503,994
Totals	112,321,148	22,345,676	2,220,915	136,887,739	106,463,023
<u>Eastern Europe</u>					
Albania	1,644,384	—	—	1,644,384	2,433,760
Bulgaria	—	—	—	—	1,929,134
Poland	—	1,836,800	—	1,836,800	3,782,013
U.S.S.R. (Russia)	10,968,577	1,118,768	—	12,087,345	47,260,573
Totals	12,612,961	2,955,568	—	15,568,529	55,405,480
<u>Africa</u>					
Algeria	4,664,575	9,601,776	163,357	14,429,708	1,555,899
Angola	—	—	12,190	12,190	9,200
Cameroon	—	—	1,610	1,610	9,315
Congo	—	—	—	—	122,379
Congo-Kinshasa	—	—	151,943	151,943	63,567
Dahomey	—	—	20,930	20,930	33,585
Ethiopia	—	—	—	—	400
Gabon	—	—	5,658	5,658	—
Gambia	—	—	57,898	57,898	62,624
Ghana	2,380,111	—	168,751	2,548,862	2,401,120
Guinea	—	—	35,420	35,420	75,143
Ivory Coast	—	—	12,834	12,834	6,700
Liberia	—	—	264,429	264,429	235,476
Malagasy	—	—	14,219	14,219	—
Malawi	—	—	62,935	62,935	56,152
Mauritania	—	—	—	—	64,604
Morocco	392,395	112,800	—	505,195	1,063,605
Mozambique	104,533	—	28,101	132,634	92,083

See footnotes at end of table.

Exports of Canadian Wheat and Wheat Flour by Destination, Crop Years 1970-71 and 1969-70 — Continued

Destination	Wheat(1)	Durum wheat(1)	Wheat flour(2)	Total wheat(1) and wheat flour(2)	Total same period last year
			bushels		
<u>Africa — Concluded</u>					
Nigeria	459,200	—	28,152	487,352	20,967
Portuguese Africa, n.e.s.	—	—	309,012	309,012	106,405
Sierra Leone	—	—	9,754	9,754	7,406
Somalia	—	—	22,287	22,287	—
South Africa	3,528,000	411,600	2,259	3,941,859	—
Sudan	36,709	—	77,899	114,608	334,209
Tanzania	—	7,976	6,152	14,128	77,121
Togo	—	—	127,563	127,563	140,553
Tunisia	—	2,111,476	—	2,111,476	1,763,701
U.A.R.	14,048,074	—	986,355	15,034,429	3,767,038
Totals	25,613,597	12,245,628	2,569,708	40,428,933	12,069,252
<u>Asia</u>					
Afghanistan	389,342	—	1,449	390,791	39,449
Bahrain	—	—	596	596	166
Burma	—	—	958,260	958,260	1,199,064
Ceylon	—	—	1,525,620	1,525,620	1,285,806
Cyprus	—	—	12,387	12,387	38,127
Hong Kong	822,956	—	181,965	1,004,921	989,137
India	17,098,372	—	—	17,098,372	16,488,698
Indonesia	—	—	1,232,289	1,232,289	653,435
Iran	—	—	5,147	5,147	3,431
Iraq	13,454,140	—	141,034	13,595,174	1,039,255
Israel	—	—	174,959	174,959	—
Japan	39,879,791	84,747	6,598	39,971,136	39,044,764
Jordan	—	—	8,367	8,367	7,767
Korea, North	2,945,589	—	—	2,945,589	—
Korea, South	—	—	—	—	1,349,472
Lebanon	—	—	225,759	225,759	711,146
Malaysia	296,858	—	—	296,858	452,600
Pakistan	4,066,847	—	—	4,066,847	2,262,475
People's Republic of China	80,053,838	8,285,909	—	88,339,747	65,114,439
Philippines	6,022,237	—	—	6,022,237	1,663
Portuguese Asia	—	—	9,419	9,419	8,855
Qatar	—	—	950	950	980
Saudi Arabia	—	—	267,158	267,158	490,463
Singapore	405,812	—	—	405,812	345,707
Syria	7,160,581	3,480,549	—	10,641,130	4,237,357
Taiwan	524,533	—	1,150	525,683	520,837
Thailand	—	—	94,461	94,461	132,745
Trucial States	—	—	4,062	4,062	2,677
Turkey	3,540,382	—	—	3,540,382	—
Yemen	19,842	—	—	19,842	—
Totals	176,681,120	11,851,205	4,851,630	193,383,955	136,420,515
<u>Oceania</u>					
Australia	—	—	230	230	—
British Oceania, n.e.s.	—	—	3,795	3,795	4,549
Fiji	—	—	1,610	1,610	5,474
United States Oceania	—	—	17,250	17,250	28,002
Totals	—	—	22,885	22,885	38,025

See footnotes at end of table.

Exports of Canadian Wheat and Wheat Flour by Destination, Crop Years 1970-71 and 1969-70 — Concluded

Destination	Wheat(1)	Durum wheat(1)	Wheat flour(2)	Total wheat(1) and wheat flour(2)	Total same period last year
bushels					
<u>Western Hemisphere</u>					
Bahamas	—	—	223,604	223,604	233,791
Barbados	70	—	341,343	341,413	307,109
Bermuda	—	—	132,662	132,662	121,086
Bolivia	—	—	4,057	4,057	—
Brazil	15,533,345	—	—	15,533,345	—
British Honduras	—	—	60,400	60,400	56,796
Chile	—	—	—	—	24,856
Cuba	3,759,345	337,087	12,380,702	16,477,134	19,011,242
Dominican Republic	—	—	35,144	35,144	1,216
Ecuador	306,259	—	—	306,259	158,005
El Salvador	—	—	—	—	228
French West Indies	—	—	3,519	3,519	1,966
Guyana	—	—	19,838	19,838	22,218
Haiti	1,634,904	—	—	1,634,904	1,184,907
Honduras	—	—	10,046	10,046	16,468
Jamaica	1,416,648	—	109,848	1,526,496	1,330,389
Leeward and Windward Islands	—	—	837,596	837,596	780,335
Netherlands Antilles	—	—	176,711	176,711	217,872
Panama	—	—	1,014	1,014	1,095
Paraguay	2,206	—	2,535	4,741	—
Peru	9,527,173	—	172	9,527,345	6,362,651
St. Lucia	334	—	—	334	167
St. Pierre and Miquelon	—	—	27,641	27,641	21,781
Surinam	—	—	27,264	27,264	17,494
Trinidad and Tobago	—	—	567,656	567,656	963,889
United States Virgin Islands	—	—	—	—	329
Venezuela	290,676	1,823	426	292,925	1,887,701
United States(4)	2,878	—	347,381	350,259	1,546,066
Totals	32,473,838	338,910	15,309,559	48,122,307	34,269,657
Sub-totals, all countries	359,702,664	49,736,987	24,974,697	434,414,348	344,665,952
Seed wheat(5)				970,537	1,831,845
Totals, all countries	359,702,664	49,736,987	24,974,697	435,384,885	346,497,797

- (1) Overseas clearances as reported by the Economics and Statistics Division of the Canadian Grain Commission, for all countries except the United States. Excluding seed wheat.
- (2) Adjusted to remove effect of time lag in the returns made by Customs. In terms of wheat equivalent. Source: Canadian Customs returns. Conversion rate: 2.3 bushels per cwt.
- (3) Source — Canadian National Millers Association.
- (4) Compiled from returns of Canadian elevator licensees and shippers and advice from American grain correspondents and Canadian Customs returns of wheat flour.
- (5) Adjusted to remove effect of time lag in the returns made by Customs.
- n.e.s. — not elsewhere specified.

Exports of Canadian Wheat (1) by Destination

Destination	Wheat	Durum	All wheat	
	(except durum)	wheat	October 1971	October 1970 ^r
		bushels		
<u>Western Europe</u>				
EEC:				
Belgium and Luxembourg	1,018,184	28,000	1,046,184	1,320,821
France	19,451	—	19,451	17,794
Germany, West	1,324,024	521,547	1,845,571	2,256,553
Italy	1,607,200	720,533	2,327,733	2,331,542
Netherlands	2,559,641	537,662	3,097,303	359,183
Sub-totals	6,528,500	1,807,742	8,336,242	6,285,893
Other Western Europe:				
Austria	—	—	—	88,924
Britain	2,362,827	—	2,362,827	6,932,443
Ireland	—	—	—	111,104
Malta and Gozo	154,000	—	154,000	327,712
Switzerland	186,517	—	186,517	478,959
Sub-totals	2,703,344	—	2,703,344	7,939,142
Totals	9,231,844	1,807,742	11,039,586	14,225,035
<u>Eastern Europe</u>				
Albania	—	—	—	358,400
Poland	—	878,847	878,847	—
U.S.S.R. (Russia)	16,078,632	1,443,645	17,522,277	—
Totals	16,078,632	2,322,492	18,401,124	358,400
<u>Africa</u>				
Algeria	—	1,371,451	1,371,451	1,695,680
Ghana	231,483	—	231,483	275,648
Guinea	203,467	—	203,467	—
South Africa	—	—	—	1,627,733
Tunisia	—	—	—	1,542,244
U.A.R.	—	—	—	3,893,038
Totals	434,950	1,371,451	1,806,401	9,034,343

For footnotes see end of table.

Exports of Canadian Wheat (1) by Destination — Concluded

Destination	Wheat	Durum	All wheat	
	(except durum)	wheat	October 1971	October 1970 ^r
bushels				
<u>Asia</u>				
Afghanistan	422,211	—	422,211	—
Hong Kong	36,213	—	36,213	86,930
India	3,589,825	—	3,589,825	3,266,928
Indonesia	284,000	—	284,000	—
Japan	4,585,691	—	4,585,691	4,117,240
Malaysia	52,453	—	52,453	61,284
Pakistan	1,008,033	—	1,008,033	3,310,548
People's Republic of China ...	7,299,037	436,112	7,735,149	2,201,169
Philippines	491,867	—	491,867	—
Singapore	—	—	—	57,493
Syria	441,280	1,616,798	2,058,078	1,082,928
Taiwan	678,720	—	678,720	—
Thailand	69,813	—	69,813	—
Totals	18,959,143	2,052,910	21,012,053	14,184,520
<u>Oceania</u>				
United States, Oceania	69,627	—	69,627	—
<u>Western Hemisphere</u>				
Brazil	6,366,100	—	6,366,100	5,000,405
Cuba	258,215	—	258,215	—
Haiti	—	—	—	170,041
Jamaica	233,475	—	233,475	—
Peru	—	—	—	1,361,920
Venezuela	164,664	4,406	169,070	77,280
Totals	7,022,454	4,406	7,026,860	6,609,646
Sub-totals, all countries.	51,796,650	7,559,001	59,355,651	44,411,944
Seed wheat(2)			136,018	84,437
Totals, all countries ..	51,796,650	7,559,001	59,491,669	44,496,381

(1) Overseas clearances as reported by the Economics and Statistics Division of the Canadian Grain Commission, for all countries except the United States.

(2) Compiled from Canadian Customs returns, 1970 adjusted for time lag.

Cumulative Exports of Canadian Wheat(1) by Destination

Destination	August - October 1971			Total same period last year ^r
	Wheat (except durum)	Durum wheat	Total wheat	
bushels				
<u>Western Europe</u>				
EEC:				
Belgium and Luxembourg ..	1,837,148 ^r	28,000	1,865,148 ^r	3,329,394
France	185,539	—	185,539	243,489
Germany, West	1,840,601	844,854	2,685,455	5,715,565
Italy	3,084,616	3,061,086	6,145,702	3,774,209
Netherlands	4,274,738	2,271,478	6,546,216	1,109,388
Sub-totals	11,222,642 ^r	6,205,418	17,428,060 ^r	14,172,045
Other Western Europe:				
Austria	—	—	—	183,551
Britain	7,629,030 ^r	—	7,629,030 ^r	16,841,931
Denmark	—	—	—	22,047
Ireland	—	—	—	398,571
Malta and Gozo	392,000	—	392,000	327,712
Norway	780,267	—	780,267	2,147,400
Sweden	18,368	—	18,368	22,047
Switzerland	591,098	—	591,098	1,629,685
Sub-totals	9,410,763 ^r	—	9,410,763 ^r	21,572,944
Totals	20,633,405	6,205,418	26,838,823	35,744,989
<u>Eastern Europe</u>				
Albania	—	—	—	358,400
Poland	—	878,847	878,847	—
U.S.S.R. (Russia)	31,967,840	2,735,677	34,703,517	4,362,808
Totals	31,967,840	3,614,524	35,582,364	4,721,208
<u>Africa</u>				
Algeria	—	2,712,247	2,712,247	2,524,181
Ghana	866,332	—	866,332	1,052,914
Guinea	203,467	—	203,467	—
Morocco	420,000	120,000	540,000	—
South Africa	—	234,746	234,746	1,627,733
Sudan	—	—	—	2,279
Tunisia	—	—	—	1,542,244
U.A.R.	—	—	—	11,347,793
Totals	1,489,799	3,066,993	4,556,792	18,097,144

See footnotes at end of table.

FARMERS' MARKETINGS OF WHEAT, PRAIRIE PROVINCES

(SPECIFIED PERIODS)

MILLION BUSHEL

800 —

700 —

600 —

500 —

400 —

300 —

200 —

100 —

0

30 year average

1940-41
1969-70

10 year average

1960-61
1969-70

1966-67

1967-68

1968-69

1969-70

1970-71

1971-72

JULY

JUNE

MAY

APR

MAR

FEB

JAN

DEC

NOV

OCT

SEPT

AUG

PEAK MARKETINGS
1966-67 CROP YEAR
632.4 MILLION BUSHEL

MILLION BUSHEL

800 —

700 —

600 —

500 —

400 —

300 —

200 —

100 —

0

EXPORTS OF CANADIAN WHEAT* AND WHEAT FLOUR**

(SPECIFIED PERIODS)

MILLION BUSHELS

700 —

600 —

500 —

400 —

300 —

200 —

100 —

0

30 year average
1940-41
1969-70

10 year average
1960-61
1969-70

JULY

JUNE

MAY

APR.

MAR.

F.

JAN.

DEC.

NOV.

OCT.

SEPT.

AUG.

1966-67

1967-68

1968-69

1969-70

1970-71

1971-72***

PEAK EXPORTS
1963-64 CROP YEAR
594.5 MILLION BUSHELS

MILLION BUSHELS

700 —

600 —

500 —

400 —

300 —

200 —

100 —

0

*Beginning with 1955-56 includes seed wheat.

**In terms of wheat equivalent.

***Preliminary.

FARMERS' MARKETINGS OF BARLEY, PRAIRIE PROVINCES

MILLION BUSHELS

275 —

(SPECIFIED PERIODS)

MILLION BUSHELS

— 275

250 —

— 250

225 —

— 225

200 —

— 200

175 —

— 175

150 —

— 150

125 —

— 125

100 —

— 100

75 —

— 75

50 —

— 50

25 —

— 25

0

0

30 year average

10 year average

1966-67

1967-68

1968-69

1969-70

1970-71

1971-72

1940-41

1960-61

1969-70

1969-70

JULY

JUNE

MAY

APR

MAR

FEB

JAN

DEC

NOV

OCT

SEPT

AUG

EXPORTS OF CANADIAN BARLEY AND BARLEY PRODUCTS*

(SPECIFIED PERIODS)

MILLION BUSHEL

225 —

200 —

175 —

150 —

125 —

100 —

75 —

50 —

25 —

0

MILLION BUSHEL

— 225

— 200

— 175

— 150

— 125

— 100

— 75

— 50

— 25

— 0

30 year average

1940-41

1969-70

10 year average

1960-61

1969-70

JULY

JUNE

MAY

APR

MAR

FEB

JAN

DEC

NOV

OCT

1966-67

1967-68

1968-69

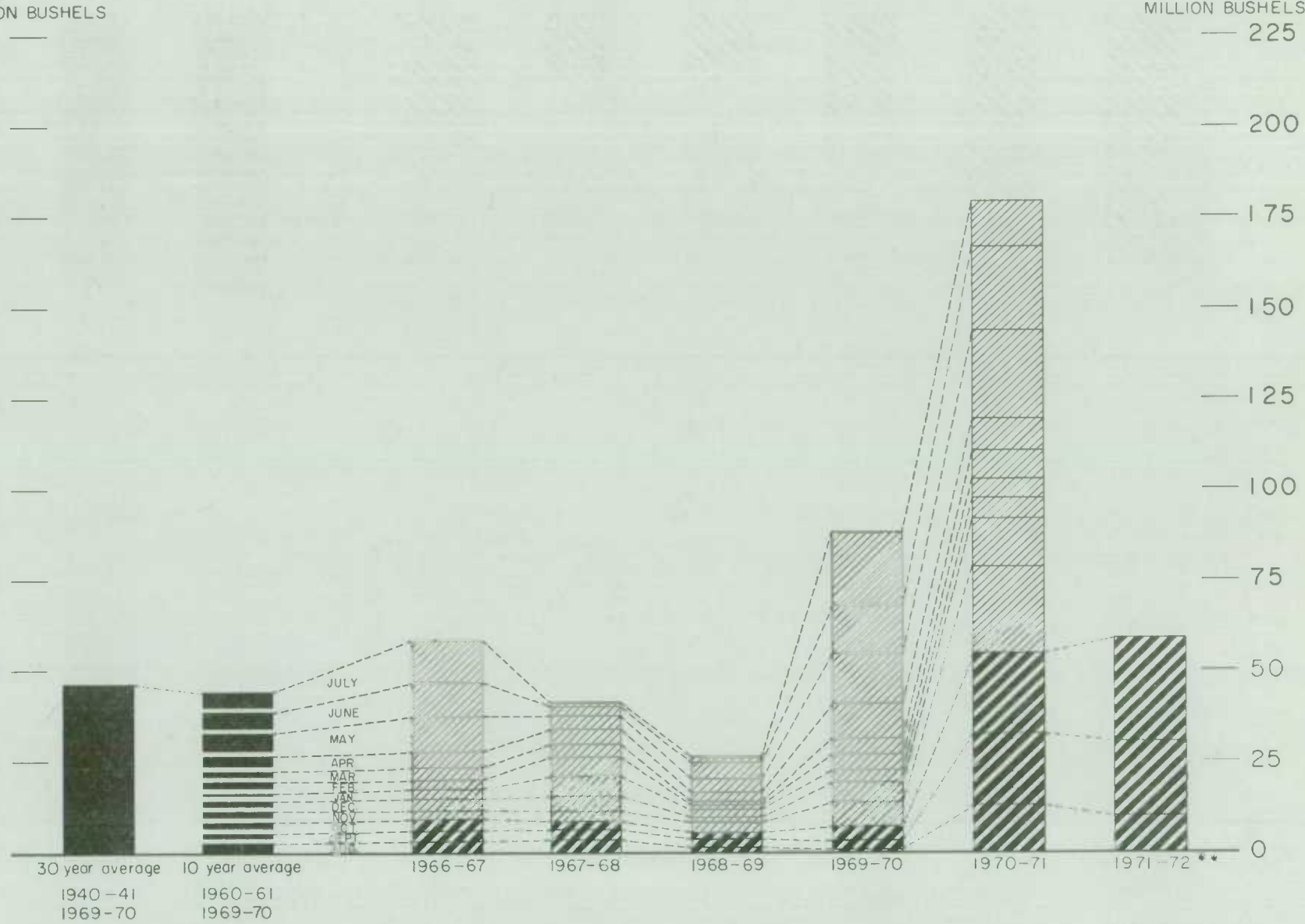
1969-70

1970-71

1971-72 **

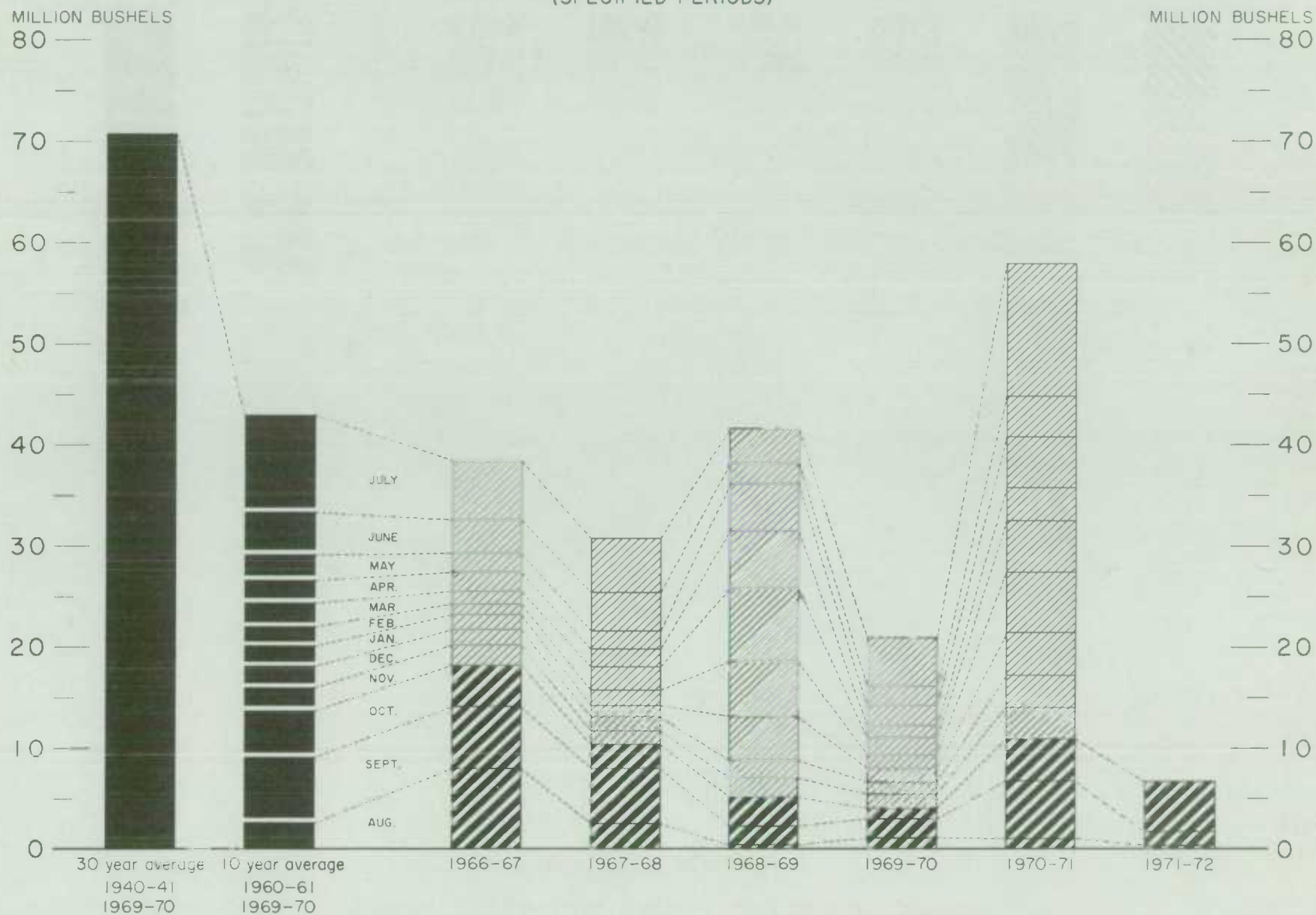
* In terms of grain equivalent. ** Preliminary.

Agriculture Division Statistics Canada



FARMERS' MARKETINGS OF OATS, PRAIRIE PROVINCES

(SPECIFIED PERIODS)



EXPORTS OF CANADIAN OATS* AND OAT PRODUCTS**

(SPECIFIED PERIODS)

MILLION BUSHELS

30 —

MILLION BUSHELS

— 30

25 —

— 25

20 —

— 20

15 —

— 15

10 —

— 10

5 —

— 5

0

— 0

30 year average
1940-41
1969-70

10 year average
1960-61
1969-70

1966-67

1967-68

1968-69

1969-70

1970-71

1971-72 ***

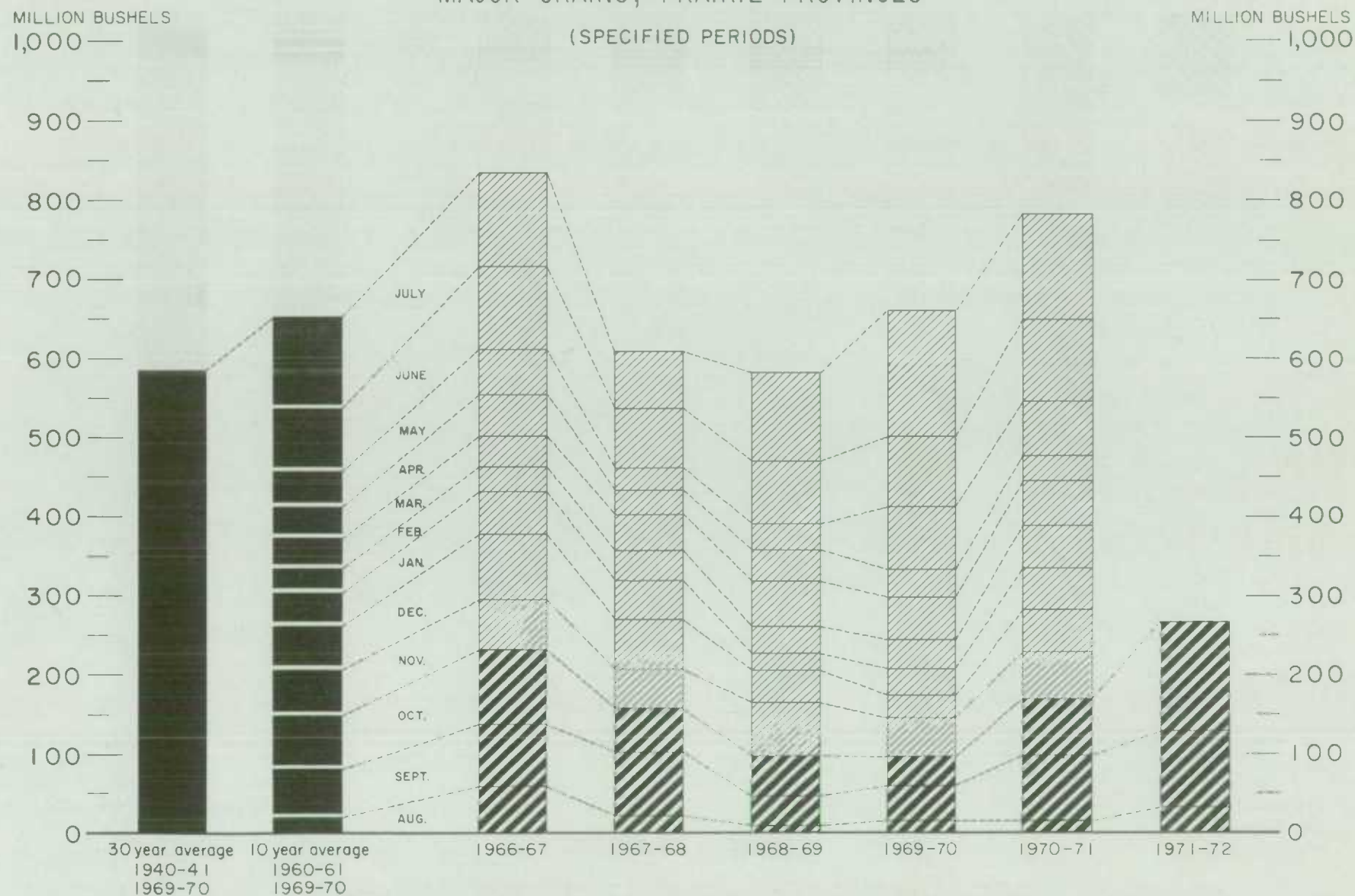
*Beginning with 1960-61 includes relatively small quantity of seed oats.

**In terms of grain equivalent

***Preliminary.

Agriculture Division Statistics Canada

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

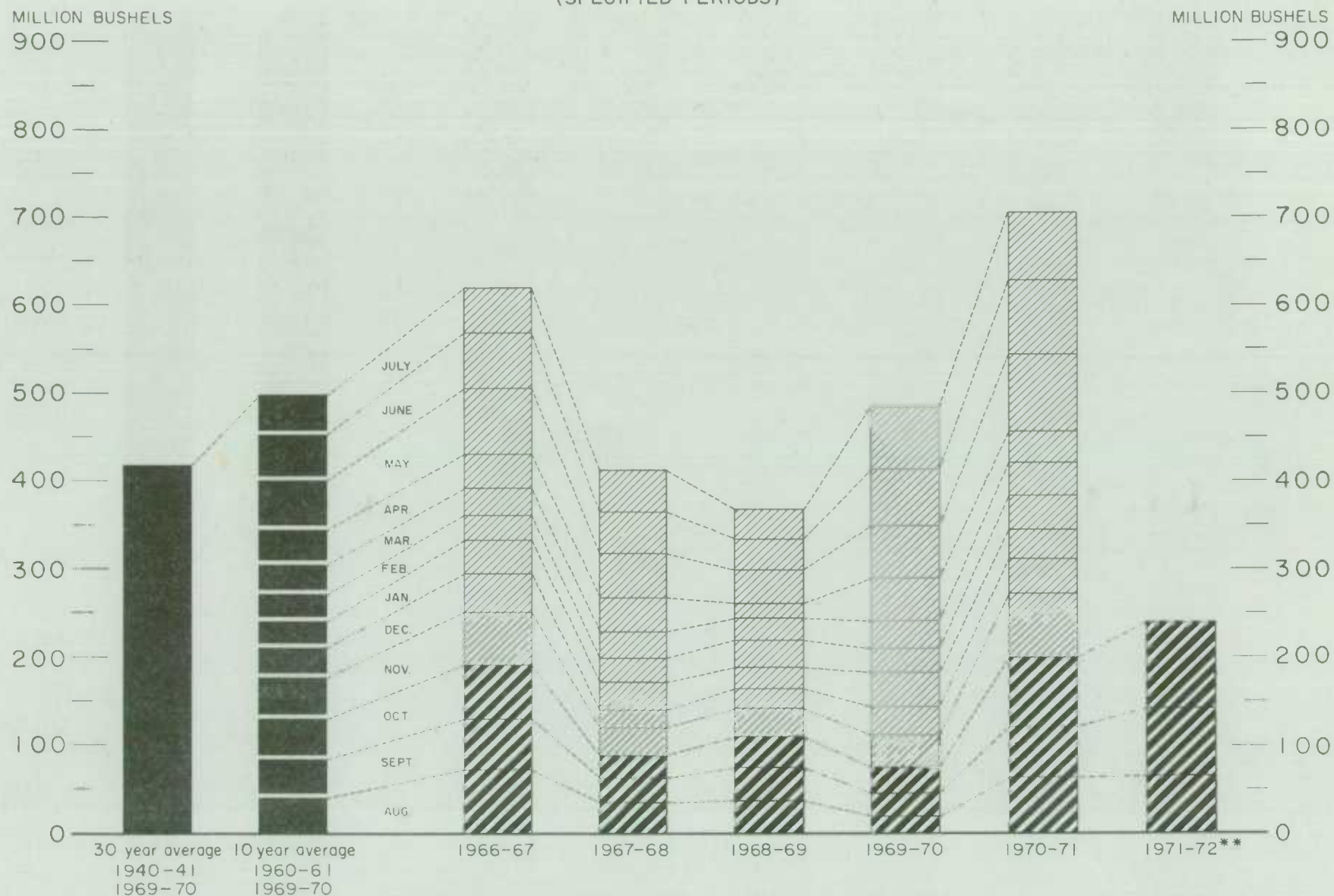


* Wheat, oats, barley, rye, flaxseed and from 1960-61 rapeseed.

Agriculture Division Statistics Canada

EXPORTS OF CANADA'S SIX MAJOR GRAINS AND PRODUCTS*

(SPECIFIED PERIODS)



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

** Preliminary.

Cumulative Exports of Canadian Wheat(1) by Destination — Concluded

Destination	August — October 1971			Total same period last year ^r
	Wheat (except durum)	Durum wheat	Total wheat	
bushels				
Asia				
Afghanistan	422,211	—	422,211	—
Hong Kong	223,888	—	223,888	212,557
India	10,716,385	—	10,716,385	15,051,572
Indonesia	284,000	—	284,000	—
Japan	14,877,058	197,874	15,074,932	10,072,280
Korea, North	1,180,666	—	1,180,666	—
Malaysia	91,093	—	91,093	61,284
Pakistan	2,717,900	—	2,717,900	3,337,615
People's Republic of China.	28,643,511	1,769,286	30,412,797	14,703,431
Philippines	2,467,361	—	2,467,361	—
Singapore	50,960	—	50,960	134,586
Syria	4,545,800	1,616,798	6,162,598	5,218,277
Taiwan	1,208,853	—	1,208,853	524,533
Thailand	123,200	—	123,200	—
Totals	67,552,886	3,583,958	71,136,844	49,316,135
Oceania				
United States Oceania	143,114	—	143,114	—
Western Hemisphere				
Brazil	10,283,242	—	10,283,242	9,887,592
Cuba	1,343,650	185,089	1,528,739	2,045,734
Haiti	575,505	—	575,505	511,828
Jamaica	524,169	—	524,169	278,880
Peru	972,533	—	972,533	3,581,723
Venezuela	164,664	4,406	169,070	185,727
United States (2)	95,200	—	95,200	—
Totals	13,958,963	189,495	14,148,458	16,491,484
Sub-totals, all countries.	135,746,007	16,660,388	152,406,395	124,370,960
Seed wheat (3)			396,321	307,452
Totals, all countries .	135,746,007	16,660,388	152,802,716	124,678,412

- (1) Overseas clearances as reported by the Economics and Statistics Division of the Canadian Grain Commission, for all countries except the United States. Excluding seed wheat.
- (2) Compiled from returns of Canadian elevator licensees and shippers and advice from American grain correspondents.
- (3) Compiled from Canadian Customs returns, 1970 adjusted for time lag.

Customs Exports of Canadian Wheat Flour by Countries of Consignment

Destination	June	September	August - September	
	1971(1)	1971(2)	1971(2)	1970(1)
bushels				
<u>Western Europe</u>				
EEC:				
Belgium and Luxembourg	—	—	—	15,815
Germany, West	386	—	—	—
Italy	2,070	—	—	2,070
Netherlands	—	—	—	653
Sub-totals	2,456	—	—	18,538
Other Western Europe:				
Britain	142,064	115,000	304,023	252,480
Gibraltar	—	—	2,705	—
Greece	1,012	—	—	—
Iceland	—	6,695	19,805	—
Ireland	—	3,606	3,606	—
Malta and Gozo	—	—	—	46
Portugal	1,946	1,840	3,680	2,990
Sub-totals	145,022	127,141	333,819	255,516
Totals	147,478	127,141	333,819	274,054
<u>Africa</u>				
Algeria	—	534,667	534,667	—
Angola	—	—	—	2,300
Cameroon	—	13,214	13,214	—
Congo-Kinshasa	—	11,730	16,330	56,794
Dahomey	—	—	11,730	5,290
French Africa nes	—	141,135	141,135	—
Gabon	—	—	—	5,658
Gambia	166	—	4,600	20,010
Ghana	253	—	375	150,202
Ivory Coast	460	460	690	2,530
Liberia	6,058	7,866	32,306	59,586
Malawi	2,576	4,140	4,140	15,537
Mozambique	2,534	782	3,544	12,843
Nigeria	—	561	5,161	—
Portuguese Africa nes	185,757	1,150	8,292	20,779
Sierra Leone	825	—	400	3,503
Somalia	—	—	22,816	—
South Africa	—	—	—	2,259
Sudan	—	—	—	13,745
Tanzania	—	—	1,610	805
Togo	3,096	1,380	23,495	23,529
U.A.R.	—	856,697	1,299,327	127,671
Totals	201,725	1,573,782	2,123,832	523,041
<u>Asia</u>				
Afghanistan	345	—	—	—
Ceylon	—	—	—	394,542

For footnotes see end of table.

Customs Exports of Canadian Wheat Flour by Countries of Consignment — Concluded

Destination	June	September	August — September	
	1971(1)	1971(2)	1971(2)	1970(1)
	bushels			
<u>Asia — Concluded</u>				
Cyprus	—	276	276	—
Hong Kong	19,780	21,793	30,924	27,200
Indonesia	1,014	—	—	—
Iran	715	414	823	536
Iraq	—	—	—	141,034
Israel	174,959	—	—	—
Japan	230	963	2,502	1,426
Jordan	8,112	—	8,367	—
Lebanon	201,595	5,152	98,957	2,157
Portuguese Asia	1,012	—	—	1,012
Qatar	115	—	—	145
Saudi Arabia	—	76,059	78,359	90,459
Syria	—	67,027	67,027	—
Thailand	8,050	7,979	10,279	20,113
Trucial States	352	—	345	—
Totals	416,279	179,663	297,859	678,624
<u>Oceania</u>				
Australia	230	—	—	—
British Oceania nes	345	—	—	460
Fiji	—	920	920	—
United States Oceania	—	92	92	3,450
Totals	575	1,012	1,012	3,910
<u>Western Hemisphere</u>				
Bahamas	23,485	6,647	21,135	33,072
Barbados	38,337	25,452	42,817	29,028
Bermuda	12,300	8,298	16,005	18,848
British Honduras	6,488	1,702	5,895	7,818
Cuba(3)	1,103,809	1,618,544	2,141,578	1,030,294
Dominican Republic	—	—	—	35,144
French West Indies	2,599	—	—	—
Guyana	2,659	796	1,449	2,272
Honduras	2,187	228	228	2,990
Jamaica	8,646	5,154	10,453	18,717
Leeward and Windward Is.	79,971	68,192	118,130	127,148
Netherlands Antilles	7,208	3,671	4,738	37,899
Panama	—	—	338	—
St. Pierre and Miquelon	2,220	—	2,634	3,128
Surinam	1,249	748	1,541	4,485
Trinidad and Tobago	33,500	34,523	54,315	73,954
United States	63,126	6,440	10,364	100,485
Totals	1,387,784	1,780,395	2,431,620	1,525,282
Totals, all countries ...	2,153,841	3,661,993	5,188,142	3,004,911

(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. nes — Not elsewhere specified.

Note: Data for October wheat flour exports not available.

Canadian Wheat Board Weekly Average Cash Wheat Prices, Crop Year 1971-72
Basis in Store Thunder Bay and Vancouver

Class and grade	Week ending			
	Oct. 22	Oct. 29	Nov. 5	Nov. 12
cents and eighths per bushel				
<u>Initial payment to producers</u>				
1 C.W. Red Spring 14%	146	146	146	146
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	146	146	146	146
2 C.W. Amber Durum	142	142	142	142
3 C.W. Amber Durum	137	137	137	137
<u>Exports</u>				
<u>(Basis in store Thunder Bay)</u>				
1 C.W. Red Spring 14%	165/5	165/4	165/7	166
1 Northern	167/5	167/4	167/7	168
2 Northern	165/5	165/4	165/7	166
3 Northern	160/5	160/4	160/7	161
4 Northern	157/5	157/4	157/7	158
5 Wheat(1)	145/4	148/4	148/4	148/4
6 Wheat(1)	143/4	146/4	146/4	146/4
Feed Wheat(1)	138/4	141/4	141/4	141/4
1 C.W. Garnet	157/5	157/4	157/7	158
2 C.W. Garnet	156/5	156/4	156/7	157
3 C.W. Garnet	155/5	155/4	155/7	156
1 Alberta Red Winter	157/5	157/4	157/7	158
2 Alberta Winter	156/5	156/4	156/7	157
3 Alberta Winter	155/5	155/4	155/7	156
1 C.W. Amber Durum	162/4	162/3	162/6	162/7
2 C.W. Amber Durum	159/4	159/3	159/6	159/7
3 C.W. Amber Durum	150/4	150/3	150/6	150/7
<u>(Basis in store Vancouver)</u>				
1 C.W. Red Spring 14%	174/7	174/6	175/1	175/1
1 Northern	175/7	175/6	176/1	176/1
2 Northern	174/7	174/6	175/1	175/1
3 Northern	172/7	172/6	172/4	170/1
4 Northern	167/7	167/6	168/1	168/1
1 C.W. Garnet	167/7	167/6	168/1	168/1
2 C.W. Garnet	166/7	166/6	167/1	167/1
3 C.W. Garnet	165/7	165/6	166/1	166/1
1 Alberta Red Winter	167/7	167/6	168/1	168/1
2 Alberta Winter	166/7	166/6	167/1	167/1
3 Alberta Winter	165/7	165/6	166/1	166/1

(1) Domestic sales only.

CANADIAN FLOUR MILLING SITUATION

Production Wheat flour production by Canadian mills during October 1971 amounted to 3,588,000 hundredweight, about one per cent over the September 1971 output of 3,557,000 hundredweight, 9 per cent above the October 1970 total of 3,277,000 hundredweight but one per cent below the ten-year (1961-70) average production for the month of October of 3,634,000 hundredweight. Mills reporting operations during October 1971 had a total rated capacity of 168,000 hundredweight per 24-hour day and on the basis of a 25-day working period 85.3 per cent of this rated capacity was effective. Wheat milled for flour during October 1971 amounted to 8,164,000 bushels, 3 per cent over the 7,962,000 bushels milled during the preceding month and 11 per cent more than the 7,387,000 bushels milled during October 1970. Of the wheat milled for flour during October 1971 some 6,829,000 bushels were Western Canadian spring wheat (other than Durum) while the remainder consisted of Ontario winter wheat (707,000 bushels); Durum (425,000 bushels); and all other (203,000 bushels).

Exports According to preliminary Customs returns, exports of Canadian wheat flour during September 1971 amounted to the equivalent of 3,662,000 bushels (some 1,592,000 hundredweight of flour) sharply above both the August 1971 exports of 1,526,000 bushels and the adjusted September 1970 exports of 2,306,000 bushels. Flour shipments during the month under review went to thirty-nine countries with leading markets for Canadian wheat flour in terms of wheat, in thousands of bushels, as follows: Cuba, 1,619; U.A.R., 857; Algeria, 535; French Africa, n.e.s., 145; Britain, 115; Saudi Arabia, 76; Leeward and Windward Islands, 68; and Syria, 60.

NOTE: Data re exports of wheat flour for October 1971 by country of destination are not available at this time and will be included in the next issue.

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	85,048,591	37,621,151	10,705,452
1969-70	90,557,332	39,640,459	11,723,205
1970-71(2)	87,466,864	38,533,275	10,728,762
1971-72(2)			
August	7,476,891	3,298,715	663,543
September ^r	7,962,496	3,556,947	1,592,171
October	8,164,466	3,588,290	1,199,438
Totals	23,603,853	10,443,952	3,455,152
Same months 1969-70 ^r	23,378,084	10,240,093	3,304,212

(1) Based on Customs returns. Exports for the crop years 1945-46 - 1969-70 revised to remove effect of time lag in the returns made by Customs. (2) Subject to revision.

UNITED STATES SITUATION

Supplies Above Previous Year Total domestic supplies of wheat in the United States for the 1971-72 crop year are currently placed at 2,357.8 million bushels, 4 per cent above the previous year's total of 2,263.1 million, reflecting an increase in production, which more than offset a 17 per cent decrease in carryover stocks. In addition, current crop year domestic supplies may be supplemented by imports of about 1 million bushels. Domestic disappearance during 1971-72 is estimated at about 785.0 million bushels, one per cent below the 794.8 million last year. After deducting anticipated domestic requirements for the current United States crop year, some 1,572.9 million remain available for export and for carryover, 7 per cent more than the 1,468.5 million in 1970-71.

Exports Decrease from a Year Ago Exports of wheat and wheat flour in terms of grain equivalent during July-October 1971 amounted to 198.2 million bushels, 19 per cent less than the 243.5 million exported during the same four months last year. The balance remaining on November 1, 1971 for export and for carryover was estimated at 1,374.7 million bushels compared with 1,225.0 million on the same date a year ago.

United States Wheat Supplies

Item	1970-71 ^r	1971-72 ^p
	million bushels	
Carryover at beginning of crop year (July 1)	884.7	730.2
Production	1,378.5	1,627.6
Total estimated domestic supplies	2,263.1	2,357.8
Imports of wheat and wheat flour in terms of wheat for domestic use, July-October	0.2	0.2
Total estimated supplies(1)	2,263.3	2,357.9
Less estimated domestic requirements for crop year(2)	794.8	785.0 ^r
Available for export and for carryover	1,468.5	1,572.9
<u>Deduct</u>		
Exports of wheat as grain, July-October	223.4	179.0
Exports of wheat flour in terms of wheat, July-October	20.1	19.2
Total exports of wheat and wheat flour	243.5	198.2
Balance on November 1 for export and for carryover.	1,225.0	1,374.7

(1) Excluding imports for November-June.

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

Summary of the
Wheat Situation

On November 10, 1971 the United States Department of Agriculture stated that developments for wheat thus far during the 1971-72 marketing year point to a substantial increase in stocks by next summer, perhaps by nearly 250 million bushels. Wheat supplies for the season, bolstered by a record crop, total 2.4 billion bushels, 4 per cent larger than last year. But total disappearance may fall by around 150 million bushels because of lower feeding and reduced exports.

A record average yield of 33.7 bushels per acre together with a 9 per cent increase in acreage pushed the 1971 crop to a new high of 1,628 million bushels. There was a record hard red spring crop, and all other classes were up substantially except hard red winter which about equaled the 1970 crop.

Wheat feeding is expected to be down only moderately from last year's large volume of 216 million bushels. Extremely heavy wheat feeding during July-September reflected the low level of wheat prices relative to corn at that time. However, record feed supplies this fall have led to lower feed grain prices, thus reversing the unusual situation when wheat was cheaper than corn and sorghum.

Wheat exports for the 1971-72 season could total 15 to 20 per cent below last year. A larger 1971 world crop has lowered import demand. The dock strikes are also limiting shipments. Some sales to Far Eastern markets have already been lost to Australia and Canada because of the West Coast shutdown. July-September exports were only slightly under the high level of a year ago, but reflected anticipation of the October dock strike at Atlantic and Gulf ports.

Food use of wheat probably will remain about 520 million bushels, the level of the last 4 years. Seed for the 1972 crop is expected to increase by 5 million bushels, in anticipation of an expansion of winter wheat plantings.

Farm prices have been below year-earlier levels since August and for 1971-72 will average below last year's \$1.34 per bushel. As prices moved lower, growers stepped up their use of the price support program. By the end of September, the cumulative total placed under loan reached 252 million bushels, nearly equal to the level of the entire 1970-71 season. Activity has been particularly heavy in the spring wheat States of the Northern Plains and in the Pacific Northwest

Market prices for hard and soft red winter wheat, which have shown exceptional strength, have been buoyed by strong export and feed demand. July-September export inspections tripled the year-earlier level for soft red and rose a third for hard red. High feed grain prices in the Southwest and Southeast led to exceptionally heavy early season feed use.

Hard red spring wheat prices have been depressed by the record crop and the loss of exports out of West Coast ports. Nearly all grades are near loan levels. High-protein springs, which are in short supply, have been selling well above loan.

White wheat markets have been seriously affected by the shutdown of Pacific ports. Export sales have been lost as customary buyers shifted some purchases to other suppliers.

Stocks of Wheat
in All Positions
October 1, 1971

On October 22, 1971 the United States Department of Agriculture stated in a release that stocks of all wheat were 4 per cent above a year earlier and the highest in 8 years with durum wheat stocks up 22 per cent. Rye stocks were a third larger, while holdings of flaxseed were 5 per cent lower than a year ago.

All wheat in storage October 1 totalled 1,876 million bushels, 4 per cent above a year earlier and the highest October stocks since 1963. Off-farm stocks of 1,053 million bushels were 6 per cent below a year earlier but farm holdings of 824 million were record high and 22 per cent above a year ago. Disappearance from all storage positions during July-September is indicated at 482 million bushels, compared with 465 million a year earlier. The Commodity Credit Corporation owned 376 million bushels of the total wheat stocks and had loans outstanding on an additional 420 million.

Durum wheat stocks in all positions on October 1 totalled 127 million bushels, 22 per cent more than a year earlier but 2 per cent less than 2 years earlier. Farm holdings of 100 million were 27 per cent above last year and off-farm stocks of 27 million were up 6 per cent. Disappearance during July-September 1971 is indicated at 12.9 million, compared with 23.6 million a year earlier.

Stocks of United States Wheat by Position, October 1, 1971 with Comparisons

Grain and position	Oct. 1, 1969	Oct. 1, 1970	July 1, 1971	Oct. 1, 1971
thousand bushels				
<u>All wheat</u>				
On farms(1)	755,030	673,213	239,681	823,701
Commodity Credit Corp.(2)	913	1,878	1,814	1,886
Mills, elev. & whses.(1,3) ...	1,119,296	1,122,666	489,388	1,050,631
Totals	1,875,239	1,797,757	730,883	1,876,218
<u>Durum wheat(4)</u>				
On farms(1)	106,230	78,918	36,377	100,132
Commodity Credit Corp.(2)	172	436	558	581
Mills, elev. & whses.(1,3) ...	23,015	25,155	16,259	26,580
Totals	129,417	104,509	53,194	127,293

(1) Estimates of the Crop Reporting Board.

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

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

(4) Included in all wheat.

ARGENTINE SITUATION

Supplies Lower than Previous Year Estimated total supplies of wheat in Argentina for the 1970-71 (December-November) crop year amount to 183.7 million bushels, consisting of the December 1, 1970 carryover of 27.5 million bushels and the crop placed at 156.2 million. Indicated supplies for the current Argentine crop year, reflecting a substantial decline in production which more than offset a 76 per cent increase in carryover stocks, are about 33 per cent less than the 1969-70 total of 273.5 million bushels. After making an allowance of 150.0 million bushels for anticipated domestic requirements, an estimated 33.7 million are available for export and for carryover compared with 116.7 million in 1969-70.

Exports Down from Year Ago Preliminary exports of wheat and wheat flour in terms of wheat equivalent during December 1970 - October 1971 amounted to 29.6 million bushels, considerably below the 82.4 million exported during the same months in 1969-70. The balance remaining on November 1, 1971 for exports and for carryover was estimated at only 4.1 million bushels, substantially below the November 1, 1970 total of 34.3 million.

Argentine Wheat Supplies

Item	1969-70 ^r	1970-71 ^p
	million bushels	
Carryover at beginning of crop year (December 1)(1) ...	15.6	27.5
Production	257.9	156.2
Total estimated domestic supplies	273.5	183.7
Imports, December - October
Total estimated supplies	273.5	183.7
Less estimated requirements for crop year	156.8	150.0
Available for export and for carryover	116.7	33.7
<u>Deduct</u>		
Exports of wheat as grain, December - October	77.7	24.5
Exports of wheat flour in terms of wheat, December - October.....	4.7	5.1
Total exports of wheat and wheat flour	82.4	29.6
Balance on November 1 for export and for carryover	34.3	4.1

(1) Includes allowances for farm stocks.

The following account of the Argentine situation has been extracted from a report from Mr. H.G. Fairfield Assistant Commercial Secretary (Agriculture) Buenos Aires, under date of November 9, 1971 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.

Under the terms of the recent wheat agreement between Argentina and Brazil, 21,000 metric tons (772,000 bushels) of bread wheat were shipped to Brazil in October-November. The agreement calls for 150,000 metric tons (5,511,000 bushels) to be shipped by the end of this calendar year at a price of U\$S 65.00 per ton (\$1.80 per bushel Cdn.) f.o.b. Buenos Aires.

The third estimate of the area seeded to wheat is up 70,000 hectares (173,000 acres) to 4,720,000 (11,658,000 acres) in comparison to the previous estimate. This represents an increase of 12 per cent over the previous year.

The estimates by province are as follows:

	<u>1970-71</u>	<u>1971-72</u>
	thousand acres	
Buenos Aires	6,510	6,834(1)
Santa Fe	1,447	1,704
La Pampa	551	1,193
Cordoba	914	968
Entre Rios	646	624
Chaco	122	136
Others	187	199
Totals	<u>10,377</u>	<u>11,658</u>

(1) Includes 829,000 acres sown to durums.

During most of October hard wheat prices were steady at 22.30 pesos per 100 kilos (\$1.23 per bushels) f.o.r. Buenos Aires but declined slightly at the end of the month at 22.10 pesos (\$1.22 per bushel). At Bahia Blanca as well, hard wheat was quoted at 21.70 pesos (\$1.20 per bushel) at the beginning of the month and closed at 21.60 pesos (\$1.19 per bushel).

Durum prices fluctuated between 20.00 pesos (\$1.11 per bushel) at the beginning of October and 18.00 pesos (\$1.00 per bushel) on October 23, closing at 19.00 pesos per 100 kilos (\$1.05 per bushel) f.o.r. Buenos Aires on October 30. At Bahia Blanca the trend was similar at 21.00 pesos (\$1.16 per bushel) at the beginning of the month, 18.00 pesos (\$1.00 per bushel) on October 23 and 19.00 pesos (\$1.05 per bushel) on October 30.

On the Futures Exchange hard wheat was quoted at the end of October at 22.30 pesos (\$1.23 per bushel) for November delivery. There have been no quotations for December or January delivery.

Argentine Wheat Exports December - August 1969-70 and 1970-71

Destination	August		December - August	
	1970	1971	1969-70	1970-71
thousand bushels				
<u>Western Europe</u>				
EEC:				
Belgium and Luxembourg ...	—	—	911	—
France	—	—	601	244
Germany, West	—	—	276	26
Italy	2,015	373	20,916	11,163
Netherlands	—	—	986	259
Sub-totals	2,015	373	23,690	11,692
Other Western Europe:				
Britain	37	—	474	—
Portugal	—	—	798	—
Spain	—	—	—	448
Sub-totals	37	—	1,272	448
Totals	2,052	373	24,962	12,140
<u>Africa</u>				
Algeria	—	—	537	—
Libya	161	—	580	909
Totals	161	—	1,117	909
<u>Asia</u>				
India	—	—	2,022	—
Lebanon	—	—	287	261
Syria	—	—	—	1,533
Totals	—	—	2,309	1,794
<u>Western Hemisphere</u>				
Bolivia	—	—	—	18
Brazil	2,433	—	25,452	4,354
Chile	358	1,091	2,887	2,730
Paraguay	256	—	1,429	142
Peru	1,213	—	5,475	318
Totals	4,260	1,091	35,241	7,562
Totals, all countries ..	6,472	1,464	63,628	22,403

FRENCH SITUATION

Supplies Decline from Previous Year

Total estimated commercial domestic supplies of soft wheat in France for the crop year (August-July) 1970-71, consisting of the August 1 carryover of 83.3 million bushels and anticipated marketings of 354.6 million amount to some 437.9 million, a decrease of 14 per cent from the 1969-70 total of 509.5 million. Imports of wheat during August 1970-July 1971, including durum wheat and both hard and soft wheat have amounted to 13.9 million bushels, 19 per cent below the 17.0 million imported during the 1969-70 crop year. After deducting 229.6 million bushels for estimated domestic use, including normal feed wheat requirements, the surplus available for export and for carryover is about 222.2 million bushels compared with 289.2 million the previous year.

Exports Down from a Year Ago

Combined exports of wheat and wheat flour in terms of grain equivalent during the 1970-71 crop year, at 124.3 million bushels, represented a decline of 40 per cent from the comparable August 1969-July 1970 total of 205.9 million. The balance of commercial supplies remaining on August 1, 1971 for export and for carryover amounted to 97.8 million compared with the August 1, 1970 total of 83.3 million bushels.

French Soft Wheat Supplies

Item	1969-70 ^r	1970-71 ^p
	million bushels	
Commercial carryover, August 1	103.9	83.3
Anticipated deliveries to Grain Board	405.6	354.6
Total estimated commercial domestic supplies ..	509.5	437.9
Imports, August-July	17.0	13.9
Total commercial supplies	526.6	451.8
Less domestic requirements for crop year	237.3	229.6
Available for export and for carryover	289.2	222.2
<u>Deduct</u>		
Exports of wheat, August-July	172.0	83.3
Exports of wheat flour in terms of wheat, August-July	33.9	41.0
Total exports of wheat and wheat flour	205.9	124.3
Balance on August 1 for export and for carryover.	83.3	97.8

The following account of the wheat situation in France has been extracted from a report from Mr. G.W. Doucet, Commercial Secretary (Agriculture) Canadian Embassy, Paris, under date of October 22, 1971 and is reproduced with 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. — Weather conditions have been quite variable during August, several sunny days being followed by storms. Temperatures were largely normal throughout the late summer period, although the rain that did occur was quite violent, especially in the latter part of August. This weather is expected to reduce the quality of the soft wheat significantly. Yields vary across the country, being very low in the South West and very high in the North.

Durum wheat yields are normal. Soft wheat deliveries during the 1971-72 crop year are expected to reach 11.800,000 metric tons (433.6 million bushels), while durum deliveries may reach 450,000 (16.5 million bushels), representing an upward revision by ONIC for soft wheat and no change for durum.

Soft wheat supply-disposition. — There was a significant drop in farm deliveries in 1970-71, resulting in a cutback in exports. The decline in exports was most significant in terms of third countries with little change as far as exports to other E.E.C. countries are concerned. There was a decline in human consumption in 1970-71, partly offset by an increase in denaturation for animal feed.

In 1971-72 it is expected that millers demand for soft wheat in France will recover and increase by 25-30 per cent. Exports to third countries will also increase significantly, probably surpassing their 1969-70 level. The carryover at August 1, 1972 is expected to be about 1,500,000 metric tons (55.1 million bushels).

Durum wheat supply-disposition. — Durum deliveries increased significantly in 1970-71 and these are expected to be even higher in 1971-72. Imports declined considerably in the last campaign, primarily affecting Canadian sales. Despite this, the largest portion of the durum production increase has gone to carryover.

International trade. — French wheat imports in the 1970-71 crop year ending July 31 were about 378,000 metric tons (13.9 million bushels) of which 237,000 tons (8.7 million bushels) was durum. Both soft and durum wheat imports declined from their 1969-70 levels. Canada and the U.S.A. account for most of the soft wheat imports, with roughly equal shares of about 60,000 tons (2.2 million bushels). On the durum side, the U.S.A. remains the largest supplier with 187,000 tons (6.9 million bushels) followed by Canada with 26,000 tons (1.0 million bushels). Canadian durum exports to France fell considerably to account for almost all of the decline in French durum imports during 1970-71.

French Wheat Imports

Destination	August - July	
	1969-70	1970-71
thousand bushels		
<u>Durum wheat</u>		
Greece	148	—
Algeria	6	—
United States	7,446	6,897
Canada	2,399	964
Argentina	546	902
Others	1	—
Totals	10,546	8,763

For footnotes see end of table.

French Wheat Imports - Concluded

Destination	August - July	
	1969-70	1970-71
thousand bushels		
<u>Hard and soft wheats</u>		
Belgium	12	2
Germany	—	(1)
Italy	—	1
U.S.S.R.	567	445
United States	3,154	2,350
Canada	2,087	2,213
Argentina	659	118
Australia	10	—
Totals	6,488	5,127
Totals, all wheat	17,034	13,891

(1) Less than 500 bushels

The 1970-71 crop year totals showed more than a 50 per cent decrease in soft wheat exports and a small decrease in durum exports.

Total soft wheat exports declined from about 4.7 million tons (172.0 million bushels) to about 2.3 million tons (83.3 million bushels). The decline in exports to third countries accounts for most of this. E.E.C. partners in 1970-71 received 1.7 million tons (62.5 million bushels) compared to 2.1 million tons (77.2 million bushels) in 1969-70, and third countries bought 467,000 metric tons (17.2 million bushels) instead of 2.5 million tons (91.9 million bushels) during the previous year.

Wheat flour exports in terms of wheat increased to 1,116,000 tons (41.0 million bushels) this 1970-71 crop year compared with 924,000 tons (33.9 million bushels) during 1969-70.

French Wheat Exports, August-July

Destination	Feed		Durum		Soft milling	
	1969-70	1970-71	1969-70	1970-71	1969-70	1970-71
thousand bushels						
Belgium	12,560	9,683	210	220	13,121	11,119
Holland	2,729	1,171	—	9	17,005	14,804
Germany	5,777	2,536	49	253	23,351	18,788
Italy	4	29	627	273	3,932	6,826
U.K.	474	—	59	15	19,522	2,842
Switzerland	26	8	32	1	5,936	1,951
Ireland	—	—	—	—	619	29
Norway	—	—	—	—	817	—
Portugal	—	—	—	—	2,595	9
Andorra	(1)	2	—	—	16	15
Gibraltar	17	—	—	—	—	—

For footnotes see end of table.

French Wheat Exports, August-July — Concluded

Destination	Feed		Durum		Soft milling	
	1969-70	1970-71	1969-70	1970-71	1969-70	1970-71
thousand bushels						
Turkey	—	—	—	—	—	367
Poland	63	—	—	—	393	—
Spanish N. Africa	—	—	—	—	—	197
Tunisia	—	—	—	—	3,649	1,703
Libya	—	9	—	—	—	—
Egypt	4	145	9	—	15,645	—
Ghana	—	9	—	—	—	—
Dahomey	—	2	—	—	—	—
Guadeloupe	—	1	—	—	—	—
Reunion	—	13	—	—	—	—
Martinique	2	—	—	—	—	—
Madagascar	—	—	1	1	—	—
Mauritania	—	—	—	—	15	16
Upper Volta	—	—	—	—	—	285
Senegal	—	—	—	—	6,809	4,393
Ivory Coast	—	—	—	—	(1)	2,833
Cameroon	1	13	—	—	1,198	927
Central African Rep. .	—	—	—	—	220	388
Gabon	—	—	—	—	340	358
Congo-Brazza	—	—	—	—	2	189
El Salvador	—	—	—	—	1	—
French Guiana	—	—	—	—	26	—
Israel	—	—	—	—	194	—
Yemen	—	—	—	—	9	—
Pakistan	—	—	—	—	550	551
Malaysia	1	—	—	—	708	—
Singapore	—	—	—	—	778	—
Philippines	—	(1)	—	—	1,665	—
China	24	—	—	—	26,294	136
Japan	—	—	—	—	1,256	29
Guyana	8	1	—	—	—	—
Chile	—	1	—	—	—	—
Others	13	80	—	—	2,603	96
Totals, all wheat ..	21,703	13,702	986	774	149,269	68,852

(1) Less than 500 bushels.

Prices. — During 1967-68 the lowest minimum price guarantee of soft wheat to the farmers (in Chateauroux) per 100 kilos FOB country was 45.35 francs (\$2.27 per bushel). For the coming 1971-72 crop year the same minimum price is now reaching 51.79 francs (\$2.60 per bushel). The difference between the 1967-68 price and the 1971-72 corresponds to an increase of 14.2 per cent or a 3.55 per cent increase each year. However, largely as a result of the 12.5 per cent devaluation of June 1970, most of this increase in the intervention price occurred between the last crop year and the 1971-72 coming crop year (11.4 per cent). The lowest minimum price guarantee for durum wheat during 1967-68 was 56.65 francs per 100 kilos (\$2.84 per bushel); FOB country; for the 1971-72 crop year the price is now 62.45 francs (\$3.13 per bushel) which means a 10.2 per cent increase in these 4 years. The difference between the 1970-71 and the 1971-72 minimum price corresponds to a 9.5 per cent increase. Since August 1, 1971 the French prices for cereals have slowly approached the level of other E.E.C. cereals prices.

WHEAT SITUATION IN FEDERAL REPUBLIC OF GERMANY

The following account of the current wheat situation in the Federal Republic of Germany has been extracted from a report received from Mr. R.B. Rossing, Commercial Officer, Canadian Embassy, Bonn, West Germany, under date of November 8, 1971 and is reproduced with the permission of the Trade Commissioner Service, Department of Industry, Trade and Commerce.

Weather conditions. — Due to favourable weather conditions winter cultivations show a good growth. This applies to rapeseed particularly. As a result of the extremely dry weather, farmers in West Germany have made very good progress so far with their autumn field work.

Planting intentions for 1972. — The first surveys lead us to expect again increased acreages of winter cultivations for 1972, i.e. 4 per cent for winter wheat, 12 per cent for winter barley, and 12 per cent for winter rapeseed. The area seeded to winter rye does not show any marked change.

Summary of the Wheat Situation

	August — July	
	1969-70	1970-71
	thousand bushels	
Usable production	213,846	201,794
Change in stocks	— 82,599	+ 15,248
Exports	94,357	29,431
Imports (1)	70,474	101,705
Domestic utilization	272,562	258,820
Seed	9,333	9,663
Feed	125,589	112,361
Loss	1,286	1,286
Industrial consumption	3,564	4,115
Food consumption	132,790	131,394

(1) Including semolina and pasta products and imports from East Germany.

Farmers' marketings of wheat from August 1970 to July 1971 at 3,434,000 metric tons (126,176,000 bushels) were 165,000 tons (6,063,000 bushels) or 4.6 per cent smaller than during 1969-70. It should, however, be taken into consideration that the July 1971 figures were extraordinarily high due to the relatively early crop season.

At the end of July, 1971 the following stocks of wheat were held by processors, co-operatives and grain traders:

	<u>1970</u>	<u>1971</u>
	thousand metric tons	
Wheat	540.0	589.5
Wheat flour	65.8	69.4
Other wheat products	22.9	21.6
Totals, wheat (grain value)	656.0	707.5 (+8 per cent)

West Germany's milling of wheat showed the following changes :

	August-July	
	1969-70	1970-71
	thousand metric tons	
Milling of wheat(1)	3,911.2	3,828.0
Production of wheat flour	2,856.0	2,794.1
Extraction rate in per cent	78.5	78.6
Production of pasta prod.	196.5	201.6

(1) Excluding mills below 500 metric tons of wheat milling per year.

Disappearance Chart for Flour (including Semolina)

<u>August-July</u>	<u>Opening stocks</u>	<u>Production</u>	<u>Imports</u>	<u>Exports</u>	<u>Closing stocks</u>
		thousand metric tons			
1969-70	99.6	3,135.2	85.2	443.2	91.0
1970-71	91.0	3,073.0	98.6	410.7	92.8

The production of wheat flour decreased by 62,200 metric tons or 2 per cent. Imports of semolina and wheat flour increased, whereas exports of wheat flour did not reach the previous year's level. Domestic sales of wheat flour dropped only slightly from 2,785,700 tons in 1969-70 to 2,759,100 tons in 1970-71. The per-capita consumption of wheat flour further declined by 1 kilogramme to 45.9 kilogrammes in 1970-71. During the last decade per-capita consumption has dropped by 9.6 kilogrammes (- 17 per cent).

The following table shows the marked trend in the utilization of wheat for milling according to origin.

<u>Crop year</u>	<u>German wheat</u>	<u>EEC wheat</u> per cent	<u>Third countries wheat</u>
1968-69	40.4	30.3	29.3
1969-70	59.7	18.4	21.9
1970-71	67.0	12.5	20.5

The utilization of wheat in mixed feeds declined both in absolute figures and in relation to other feed grains. In total, from August 1970 to July 1971 some 878,000 metric tons (32,261,000 bushels) of wheat were processed into mixed feed as against 977,000 tons (35,898,000 bushels) during 1969-70. The share of wheat in mixed feeds decreased from 29.5 per cent to 23.9 per cent.

Market prices for 100 kilos of home-grown wheat of the standard quality during 1970-71 with DM 39.35 (\$3.21 per bushel Cdn.) amounted to 105.1 per cent of the intervention price level for 1969-70 DM 39.98 (\$3.26 per bushel) corresponding to 102.1 per cent.

Imports and exports of wheat. — Due to the high demand following the below-average 1970 crop and because of intensified purchases for the Federal Reserve, about 550,000 metric tons (20,209,000 bushels) of West Germany's import volume increased by 0.8 million metric tons (29,395,000 bushels) to 2.5 million tons (91,858,000 bushels). Imports of foreign quality wheat showed a tremendous rise so that the share of wheat from EEC countries sharply dropped from 54 per cent in 1969-70 to 35 per cent in 1970-71. With 750,000 tons (27,557,000 bushels), Canada covered almost a third of the import needs, the U.S.A. being second with 670,000 tons (24,618,000 bushels) corresponding to 27 per cent of total West German imports. Shipments from France considerably declined so that she delivered only 600,000 tons (22,046,000 bushels) corresponding to a quarter of the import market, while she had shipped 800,000 tons (29,395,000 bushels) in 1969-70, i.e. 46 per cent of the market.

Exports of wheat during 1970-71 sharply dropped to 205,600 tons (7,554,000 bushels) whereas they were 1.9 million tons (69,812,000 bushels) in 1969-70. Also exports of wheat flour considerably declined from 429,000 tons to 382,000 tons in 1970-71.

Wheat: government measures. — During 1970-71 the Import and Storage Agency for Grains and Feedstuffs imported more than 500,000 metric tons (18,372,000 bushels) of foreign quality wheat so that its stocks are replenished now. It is expected that the purchasing activity of the German intervention agency therefore will be cut down. So far only tenders have been issued for the purchase of home-grown quality wheat originating in Schleswig-Holstein or Lower Saxony. These purchases are set up in order to support farmers who otherwise could hardly obtain an adequate return for their extra-expenses occurred in the growing of quality wheat.

In letters to the presidents of the co-operatives union and the grain trade the Minister of Agriculture, Mr. Ertl complained about the fact that farmers do not get premiums for high quality wheat on the basis of a high hectolitre-weight and for a low moisture content. Mr. Ertl suggested that if these premiums would not be paid by the trade this could create a precedent for the EEC to cancel certain premiums also within the conditions for intervention

Deputy Minister of Agriculture, Dr. Griesau has urged German farmers to conclude long-term contracts with the processing industry so as to avoid the accumulation of grain surpluses. So far contract farming was restricted to brewing barley but it should also be extended to wheat.

1971 crop results. — West German farmers harvested their 1971 wheat crop under rather favourable weather conditions. The extremely high crop results are primarily due to the relatively high crop yields per hectare, and — to a smaller extent — the result of the slightly enlarged acreage:

2nd Official Forecast

	<u>Average 1965-70</u>	<u>1970</u>	<u>1971</u>
	thousand acres		
<u>Acreage</u>			
Winter wheat	3,137	3,293	3,357
Summer wheat	430	395	467
	<hr/>	<hr/>	<hr/>
Totals, wheat	3,567	3,688	3,824
	bushels per acre		
<u>Yield</u>			
Winter wheat	56.5	57.0	69.6
Summer wheat	51.6	51.2	63.7
	<hr/>	<hr/>	<hr/>
Totals, wheat	55.9	56.4	68.9
	thousand bushels		
<u>Production</u>			
Winter wheat	177,250	187,758	233,393
Summer wheat	22,156	20,282	29,725
	<hr/>	<hr/>	<hr/>
Totals, wheat	199,406	208,041	263,119

On good sites up to 80 quintals per hectare (119 bushels per acre) were harvested.

According to the Federal Research Institute for Grain Processing, Detmold the processing characteristics of the 1971 wheat crop are rather good although they do not reach last year's value as can be seen on the following table:

	<u>Protein content per cent (dry basis)</u>	<u>Sedimentation rating</u>
average 1971	11.8	24
ranging from	8.6 — 16.8	6 — 73
average 1970	12.1	26
ranging from	8.9 — 17.8	5 — 73
average 1969	11.8	25
ranging from	8.0 — 16.2	5 — 69

Grouped according to the new grading system which has not yet been ratified through Parliament the following breakdown can be shown.

	Winter wheat		Summer wheat	
	1970	1971	1970	1971
	per cent		per cent	
Class S	2.8	2.2	23.0	27.9
Class I	4.9	4.2	13.9	12.6
Class II	21.6	12.9	21.8	21.0
Class III	59.9	65.3	22.8	35.2
below	10.8	15.4	18.5	3.3

Prospects for the current crop year. — Although this year's crop did not reach the top quality level of 1970 quantity-wise last year's overall level will be exceeded so that a further decline in the share of wheat from Third countries in total German millings can be anticipated. It is estimated that about 700,000 metric tons (25,720,000 bushels) of foreign quality wheat have to be imported or order to upgrade German wheat quality. The average admixture rate of about 17 to 18 per cent varies according to the quality of home-grown wheat. While it is lowest with 8 per cent in Schleswig-Holstein, it will amount to 14 - 15 per cent in Lower Saxony and Rhineland/Palatinate, and be even larger in Bavaria and the rest of the Federal Republic of Germany.

Germany — Wheat (including Durum) Imports by Source(1)

Crop Year, August — July

Country	Average		1969-70		1970-71	
	1961-62 — 65-66 (2)					
	'000 bushels	per cent	'000 bushels	per cent	'000 bushels	per cent
Canada	29,431	38	11,133	17	27,521	30
U.S.A.	14,440	19	12,162	19	24,508	27
Argentina	10,031	13	441	1	74	(3)
Australia	3,968	5	588	1	4,519	5
U.S.S.R.	2,168	3	4,703	7	1,617	2
Others	5,181	7	441	1	331	(3)
EEC	11,427	15	34,575	54	32,077	35
Thereof						
France	9,921	13	29,431	46	21,936	24
Netherlands ...	367	(3)	4,262	7	7,863	9
Others	1,139	1	882	1	2,278	3
Totals, all countries	76,647	100	64,044	100	90,646	100

(1) Excluding East Germany.

(2) Includes wheat products at grain value.

(3) Less than 0.5 per cent.

WHEAT SITUATION IN BRITAIN

The following account of the wheat situation in Britain has been extracted from a report received from Mr. G.D. Cooper, Commercial Officer, (Agriculture) for Canada, London under date of November 15, 1971 and is reproduced with the permission of the Trade Commissioner Service, Department of Industry, Trade and Commerce.

General conditions. - Dull and unsettled weather conditions prevailed during August with intermittent rain and thunderstorms delaying harvesting and damaging cereal crops. Cloud and high humidity encouraged the growth of grass and roots but helped the spread of mould on cereals. Black fungus on wheat was prevalent. September was predominantly dry and enabled the grain harvest to be completed under excellent conditions. The condition of the grain was variable with widespread reports of samples showing thin and shrivelled grain. Wild oats were particularly predominant among all cereals. Overall, however, the quality was quite good despite the early fears of deterioration through poor weather in early August and some degree of disease. The dry weather assisted autumn cultivations and the sowing of winter cereals.

Production and yields. - The Ministry of Agriculture have now issued their estimates of yields for England and Wales as at the end of September. The official estimates for Scotland and Northern Ireland are not yet available but by taking into account the historical relationships between yields in England and Wales and those for Scotland and Northern Ireland, provisional estimates for United Kingdom wheat production have been made by the Home Grown Cereals Authority of 4.7 million long tons (175.5 million bushels), an increase of 0.5 million tons (18.7 million bushels) on last year. This is based on the estimates of yields for England and Wales provided by the Ministry of 34.7 long cwt. (64.5 bushels) per acre, 1.3 long cwt. (2.4 bushels) above the end of August estimate. Of the total crop, some 300,000 long tons (11.2 million bushels) is attributed to increased acreage. The rise in the Ministry's wheat yield estimates substantiates forecasts of a record wheat crop.

The final results of the June, 1971 Census for England and Wales which has just been issued showed an increased wheat acreage of 2,619,000 acres compared with 2,394,000 in 1970.

Consumption and supplies. - The Ministry of Agriculture has issued information as at the end of August relating to the disposal and stocks of home grown wheat. These comprise information on intake by processors, exports and imports.

Stocks of wheat on farms. - Stocks of wheat in Great Britain as at the end of June, 1971 were 80,000 long tons (2,987,000 bushels) compared with 40,000 long tons (1,493,000 bushels) as at the end of June, 1970. Total stocks as a percentage of total production were 2 per cent and 1 per cent for 1971 and 1970, respectively.

Cereal deficiency payments. - The total cost of the United Kingdom Cereal Deficiency Payment for wheat for the 1970-71 crop year is expected to be £14.6 million (\$36.5 million). The guaranteed price for wheat under the Deficiency Payment Scheme was £1.5625 per long cwt. (\$2.10 per bushel) and the average market price realized for wheat during the year was £1.3821 per long cwt. (\$1.86 per bushel). Producers are therefore eligible for a deficiency payment of £0.1804 per long cwt. (24 cents per bushel) less a Home Grown Cereals Authority levy of £0.0092 per long cwt. (1.2 cents per bushel). A total of 4,037,000 long tons (150,715,000 bushels) qualified for the deficiency payment.

Cereal diseases. - Considerable concern is being expressed that wheat crops in 1972 will be subject to yellow rust attacks following this year's build up of the disease. This could result in severely reduced yields. If the winter is mild, thus enabling the fungus to over-winter and spells of cool wet weather occur next spring or early summer, widespread severe attacks could occur next year. The National Institute of Agricultural Botany have therefore advised farmers to plant a range of winter wheat varieties to spread the risk of disease.

Grain marketing. - Uncertainty among farmers as to the disposal of their grain and at what price is emphasized by the slow rate at which contracts are being registered under the Authority's Forward Contract Bonus Scheme. The Scheme offers incentives for spreading sales throughout the season but the amount of grain registered is substantially below the level of recent years. The quantity of wheat registered up to September 7, 1971 totalled 78,185 long tons (2,919,000 bushels) compared with 240,755 tons (8,988,000 bushels) last year. The Home Grown Cereals Authority suggest that this situation may be a combination of factors such as the relatively protracted harvest; sellers and buyers feeling their way in the new marketing environment and the extraordinary price rises of last year being still in sellers' minds.

The British Association of Seed and Agricultural Merchants which represents some 1,400 merchants in the United Kingdom has called for the Government to reveal its intentions for the operation of a Cereals Intervention Authority if the United Kingdom enters the Common Market. BASM also calls for a means of financing the expansion of agriculture in view of higher prices in the Community. BASM contends that as agricultural merchants provide an important source of credit for British farmers their members will need even greater cash resources in the future to meet their requirements and that there is a strong case for the Government to make funds equally available to all sectors of the industry.

National Farmers' Union members are currently looking at the possibility of a Cereals Marketing Board. They are of the opinion that the changes in the Cereals Deficiency Payment Scheme will place far more burden on farmers to obtain as much of their return from the market with entry into the E.E.C. and they consider that there is an imperative need for producers to strengthen their position in the market.

Grain markets. - An easier trend in the markets for home grown cereals is currently evident.

With ample wheat available and reduced buying interest, the price for soft milling wheat has fallen to £24.50 per long ton (\$1.64 per bushel) for November delivery.

The Home Grown Cereals Authority's ex-farm guide price for millable wheat is announced at £25.00 per long ton (\$1.68 per bushel) for November delivery and £25.25 per long ton (\$1.69 per bushel) for December delivery.

WHEAT SITUATION IN JAPAN

The following account of the wheat situation in Japan has been extracted from a report from Mr. C.D. Caldwell, Commercial Secretary (Agriculture), Canadian Embassy, Tokyo, under date of September 21, 1971 and is reproduced with the permission of the Trade Commissioner Service, Department of Industry, Trade and Commerce.

The accompanying table sets forth a detailed breakdown of wheat imports by Japan over the past three years. It is interesting to note that Canada's position, although decreasing slightly in the food wheat market in Japan, has remained relatively constant both in terms of volume and percentage of the market. We have not participated to any large degree in the feed wheat market in the past three years. This, of course, relates to the limited availability in Canada of the low grades of wheat, at low prices. The introduction of rice as feed is not likely, therefore, to affect overall Canadian sales of wheat in Japan.

Japanese Wheat Purchase Record 1968-71

	<u>1968-69</u>	<u>1969-70</u> bushels	<u>1970-71</u>
<u>Wheat for Staple Food</u>			
Soft:			
Western White	19,387,345	24,233,456	30,059,694
West Aust. FAQ	4,326,377	5,640,097	3,079,089
Victorian FAQ	—	—	3,354,075
SA/FAQ	551,150	1,058,207	—
Victorian Soft	—	—	36,743
France	—	602,039	—
Bulgaria	—	220,460	—
Argentina	672,402	—	—
Seni Hard:			
NSW/FAQ	2,560,971	—	—
HW (11.5%)	10,672,091	12,496,396	13,282,409
HW (Ordinary)	—	881,839	227,808
Hard:			
Manitoba 1	415,199	—	—
Manitoba 2	33,667,445	40,431,960	36,627,228
Manitoba 3	3,351,871	—	—

Japanese Wheat Purchase Record 1968-71 - Concluded

	<u>1968-69</u>	<u>1969-70</u> bushels	<u>1970-71</u>
Hard:- concluded			
Dark Northern Spring	10,376,859	16,541,797	17,622,638
Q'LD/PH	9,610,431	2,375,454	-
HW (13.0%)	5,675,003	11,612,940	13,751,915
US Durum	411,525	1,403,594	1,682,843
Cdn H Durum	462,966	195,842	-
Totals, food wheat	102,141,634	117,694,081	119,724,442
<u>Wheat for Feed</u>			
Soft:			
Western White	-	1,108,031	-
West A/FAQ	10,920,476	14,565,999	8,836,176
Victorian FAQ	-	-	6,622,392
France	-	624,636	-
Bulgaria	-	36,743	-
Semi Hard:			
HW (Ordinary)	7,293,545	6,394,877	6,690,955
NSW/FAQ	566,949	2,652,866	2,209,816
Hard:			
DNS	-	1,605,682	8,651,210
HW (13.0%)	6,542,145	6,330,871	8,147,827
Q'LD (13.0%)	8,807,002	6,894,513	514,406
Aust off grade	220,460	1,387,794	4,976,586
Manitoba 4	2,840,257	-	-
Totals, feed wheat	37,190,834	41,602,014	46,649,367
Totals, wheat	139,332,468	159,296,094	166,373,809
<u>Percentage Share by Country</u>			
	<u>US</u> <u>Cda</u> <u>Aust</u>	<u>US</u> <u>Cda</u> <u>Aust</u>	<u>US</u> <u>Cda</u> <u>Aust</u>
Food	45.5 37.1 16.7	57.1 34.5 7.7	63.2 30.2 5.3
Feed	33.9 6.9 59.2	37.2 - 61.4	50.3 - 49.7
All wheat	42.1 28.4 30.0	52.5 25.5 21.6	60.2 22.0 17.8

AUSTRALIAN SITUATION

Wheat Supplies Down from Last Year

Total supplies of wheat in Australia for the 1970-71, (December-November) crop year amounted to 558.6 million bushels, compared with 654.2 million in 1969-70, reflecting decreases in both carryover stocks and production. The 1970 crop estimated at 293.5 million bushels was sharply lower than the 387.5 million bushels harvested in 1969-70, and carryover stocks, at December 1, 1970, at 265.1 million bushels, were slightly less than the 266.7 million at the same time a year ago. After deducting some 100.2 million bushels for anticipated domestic requirements, an estimated 458.4 million are available for export and for carryover during 1970-71, some 18 per cent below the 562.1 million in 1969-70.

Exports Increase Over a Year Ago

Combined exports of wheat as grain and wheat flour in terms of grain equivalent during the period December 1 - October 30 of the current Australian crop year amounted to 302.7 million bushels, 13 per cent above the 267.7 million exported during the corresponding eleven months of the 1969-70 crop year. The balance remaining on October 31, 1971 for export and for carryover, at 155.7 million bushels, was 47 per cent below the comparable 1970 total of 294.4 million.

Australian Wheat Supplies

Item	1969-70 ^r	1970-71 ^p
	million bushels	
Carryover, including flour as wheat, at beginning of crop year (December 1)	266.7	265.1
Production	387.5	293.5
Total estimated domestic supplies	654.2	558.6
Less estimated domestic requirements for crop year .	92.1	100.2
Available for export and for carryover	562.1	458.4
<u>Deduct</u>		
Exports of wheat as grain, December 1 - October 30.	251.0	287.6
Exports of wheat flour in terms of wheat, December 1 - October 30	16.7	15.1
Total exports of wheat and wheat flour	267.7	302.7
Balance on October 31 for export and for carryover .	294.4	155.7

The following information relative to the Australian situation has been extracted from a report from Mr. R. Groundwater, Assistant Commercial Secretary for Canada, Melbourne, under date of November 18, 1971 and is reproduced with the permission of the Trade Commissioner Service, Department of Industry, Trade and Commerce.

Australian wheat production 1971-72. — Unfavourable weather conditions in New South Wales and Queensland have resulted in a national wheat crop substantially below that of the national quota. The estimated production is approximately 295 million bushels of which 272 million bushels are expected to be delivered to the Australian Wheat Board. The estimated deliveries are approximately 70 million bushels below that of the national quota of 339 million bushels. Lowered production, plus a record disposal of wheat by the Australian Wheat Board, will mean that total wheat available to the Australian Wheat Board for disposal in the marketing period 1971-72 will be in the vicinity of 400 million bushels. This figure is a substantial reduction from 519 million bushels available at December 1, 1970.

Estimated wheat production for the States is set down in the following table:

Estimated Wheat Production — Australia

<u>State</u>	<u>Quota(1)</u>	<u>Estimated production</u>	<u>Estimated AWB deliveries</u>	<u>Estimated acres</u>
	million bushels		million acres	
Queensland	38	27	25	1.3
New South Wales	128	75	65	6.1
Victoria	57	60	58	2.8
South Australia	40	48	44	2.6
Western Australia ...	76	85	80	5.0
Totals	339	295	272	17.8

The harvest is under way in Queensland and will be followed in the southern States in late November. Approximately 20 per cent of the acreage in Queensland has been harvested to date with total production estimated at 27 million bushels. The quota in Queensland was 38 million bushels. The shortfall is largely the result of reduced plantings due to drought conditions that plagued farmers early in the season. Some of the yields in Queensland have been lower than were originally expected, although they should be in the vicinity of 20 bushels per acre. This is only slightly lower than long term average yield and it represents an adequate crop for those who were able to plant wheat. The proportion of prime hard wheat in the initial harvest is approximately 80 per cent, however, as later crops are harvested the overall percentage is expected to be between 70-75 per cent. Slight hail damage affecting up to 500,000 acres has been experienced in isolated areas. It has not affected the quality of the remaining crop as the storms were generally not accompanied by heavy rainfall.

Generally poor seasonal conditions have been experienced by farmers throughout New South Wales for the 1971 crop. Recurring drought alternating with heavy rains has curtailed production in New South Wales to approximately 75 million bushels, which is the lowest since 1965-66 when approximately 40 million bushels of wheat were produced. Early in October wheat ranged in all stages of growth and prospects were reasonable presuming adequate precipitation was received. However, drought conditions in October lessened prospects in NSW and yields are expected to be well below the State average. There are a few limited regions which expected to harvest a good crop, but lack of rain in the northern, central and much of the southern regions led to rapid deterioration of the crop in the last four weeks. Rains were general over

(1) Including special quotas in New South Wales and Queensland for prime hard wheat.

the wheat belt in New South Wales during the first week of November, however, the rain has been too late except for final finishing of the crop. The result is that production estimates should stabilise but are unlikely to increase. It is doubtful that special quotas for hard prime wheat will be fulfilled in New South Wales. Only 2 million bushels of prime hard wheat are expected, most of which will be required for domestic consumption. Approximately 8 million bushels of northern prime hard wheat can be expected, which is not sufficient for the ready market of prime hard varieties required by the Australian Wheat Board. Harvesting has been initiated in the northern areas and will be general throughout New South Wales in the next four weeks.

Victoria has had a reasonable season overall, although there have been wide variations between the different wheat producing areas within the State. Estimated production is 60 million bushels thus an average yield of slightly over 20 bushels per acre is expected. October was generally dry which had the effect of reducing the crop potential. The Mallee region was particularly affected by limited precipitation in contrast to the Wimmera which has had an excellent season with rains in the past week providing an optimum season for the production of wheat in the particular area. No major diseases have been reported in Victoria although minor outbreaks of septoria in eastern Victoria have slightly reduced the harvest. Warm and dry weather is required in the next few weeks to fully ripen the crop and to provide suitable climatic conditions for harvesting the crop.

The South Australian wheat crop has experienced a very good season, however, October weather was extremely dry and hot. The dry conditions led to severe moisture stress of the wheat crop, and with strong north winds near the end of October the expected yields in the State have been significantly reduced. Total production is expected to be in the vicinity of 48 million bushels with the average yield being approximately 18.4 bushels per acre, which still rates as a very satisfactory year. Estimated deliveries of 44 million bushels are slightly more than the State quota of 40 million bushels, but the excess deliveries will not create undue problems. Harvesting has started in some of the dry areas such as the northern Eyre Peninsula and the Murray-Mallee areas. The rain in early November has set back harvesting a few days, but it will be general within the next month.

Due to very dry conditions in the early part of the crop year, Western Australia has not had an optimal season. Good September-October rains were very beneficial with most of the crops showing adequate growth during this period. Recent rains may depress protein content slightly, although it should not greatly alter the F.A.Q. sample as compared to protein levels in past years. There have been no major difficulties experienced other than climatic and a production of 85 million bushels is expected. The average yield is expected to be 16 bushels per acre which is very near to the long term average in the State. Harvesting should be initiated within the next few weeks presuming warm, dry weather is experienced.

Increased quotas in 1972-73 possible. — Exports of Australian wheat and flour are expected to reach a record figure of 322 million bushels in the 1970-71 season — an increase of 9 million bushels over the previous record established in 1966-67. Exports of wheat as grain should total 307 million bushels, 13 million bushels more than in 1966-67 while flour shipments are expected to reach 15 million bushels. Domestic sales could reach 61 million bushels, thus total wheat disposals could reach 383 million bushels. Carryover of 135 million bushels is expected, although even lower figures have been quoted by grower members of the Australian Wheat Board indicating that higher export shipments might be possible before the end of November.

Exports of Australian Wheat and Wheat Flour in Terms of Wheat
December 1 — October 30, 1970-71 and Corresponding Period 1969-70

Destination	Wheat		Wheat flour	
	1969-70	1970-71	1969-70	1970-71
thousand bushels				
<u>Western Europe</u>				
EEC:				
Germany, West	30	31	—	—
Netherlands	2,559	275	—	—
Sub-totals	2,589	306	—	—
Other Western Europe:				
Britain	38,756	45,462	361	349
Ireland	1,282	1,713	—	—
Italy	—	1,034	—	—
Malta	698	384	—	—
Norway	3,015	4,851	—	—
Sweden	94	—	—	—
Switzerland	137	1,631	—	—
Sub-totals	43,982	55,075	361	349
Totals	46,571	55,381	361	349
<u>Eastern Europe</u>				
Germany, East	—	5,160	—	—
U.S.S.R. (Russia)	—	1,770	—	—
Totals	—	6,930	—	—
<u>Africa</u>				
Angola	—	1,030	—	—
Ethiopia	1,597	1,567	—	—
Malawi	—	—	480	717
Mauritius — Comm.	—	—	692	558
— F. Aid	—	—	113	128
Mozambique	2,730	2,718	—	—
Rhodesia	3,207	1,945	—	—
South Africa	—	850	—	—
Sudan	7,019	5,716	—	—
Tanzania	9	688	—	—
U.A.R.	8,260	56,448	—	—
Zambia	2,677	2,055	—	—
Others	158	18	845	201
Totals	25,657	73,035	2,130	1,604
<u>Asia</u>				
Aden	1,763	343	—	—
Aden and Aden I/T	—	—	87	—
Aden and Aden I/T Atta	—	—	76	34
Arabian Gulf	—	—	210	202
Arabian Gulf Atta	—	—	1,248	1,156
Burma — F. Aid	—	—	28	556
Ceylon	2,054	2,539	—	—
— Comm.	—	—	4,125	4,347
— F. Aid	—	—	563	598

Exports of Australian Wheat and Wheat Flour in Terms of Wheat
December 1 - October 30, 1970-71 and Corresponding Period 1969-70 - Continued

Destination	Wheat		Wheat flour	
	1969-70	1970-71	1969-70	1970-71
thousand bushels				
<u>Asia - Concluded</u>				
China	86,101	3,039	—	—
Hong Kong	1,645	2,598	31	19
India - Comm.	1,773	1,877	—	—
— F. Aid	1,141	1,723	—	—
Indonesia - Comm.	—	517	8	6
— F. Aid	—	1,019	3,253	1,567
Iran	—	23,918	—	—
Iraq	3,977	17,340	—	—
Japan	30,265	32,101	—	—
Korea, North	3,560	—	—	—
Korea, South	—	11,335	—	—
Kuwait	2,997	4,055	—	—
Lebanon	2,625	2,299	—	—
Malaysia	10,164	9,772	—	—
Pakistan - Comm.	5,365	2,700	—	—
— F. Aid	954	234	—	—
Philippines	—	1,297	175	201
Sabah	—	—	5	3
Sarawak	—	—	5	(1)
Saudi Arabia	3,564	1,988	303	208
Singapore	7,667	6,508	1	1
Taiwan	2,593	5,162	—	—
Thailand	1,442	1,250	229	175
Others	1,604	1,293	190	120
Totals	171,254	134,907	10,537	9,193
<u>Oceania</u>				
New Zealand	2,022	2,011	—	—
Okinawa	131	913	—	—
Totals	2,153	2,924	—	—
<u>Western Hemisphere</u>				
Bolivia	503	1,660	—	—
Chile	3,084	6,732	—	—
Colombia	—	747	—	—
Peru	1,701	5,228	—	—
West Indies Area	—	—	53	128
Totals	5,288	14,367	53	128
<u>Pacific Area and Sundries</u>				
Pacific Islands	79	58	3,459	3,708
Ships' Stores and Sundries	—	—	162	118
Totals	79	58	3,621	3,826
Totals, all countries	251,000	287,600	16,700	15,100

(1) Less than 500 bushels.

Excellent sales in Europe, Middle East, Africa and Latin America with significant shipments to the U.A.R., Iran and Iraq have led to the record year. Sales in Asia were lower than in previous years, reflecting the minor shipments to China as sales to other countries such as Japan have been good.

For the second year in succession wheat deliveries to the Australian Wheat Board will fall well below the national quota. Estimates of total deliveries in the 1971-72 season range between 260-275 million bushels, only slightly better than in 1970-71. The reduced crop, coupled with the lower carryover, will provide the Australian Wheat Board with 395-410 million bushels for disposal, which is a substantially lower figure than in the previous marketing season.

The lower stock figures have given hope to Australian farmers that quotas could be increased in the 1972-73 season. A national quota increase of 5-10 per cent appears a probable target for the Australian Wheatgrowers' Federation who will meet in December. The first advance of A\$1.10 (\$1.28 Cdn.) per bushel will be expected by growers for deliveries. Although the Government has suggested that there is excessive optimism prevalent in the wheat industry which could lead to increased production in the coming year, it is unlikely that the Government will balk at a A\$1.10 (\$1.28 Cdn.) per bushel advance on an increased national quota of 5-10 per cent, especially if a Federal election is held in the next year.

Wheat sales in the 1971-72 selling season are expected to be substantially less than this year (1970-71), but this fact is irrelevant to the wheat politicians as is the fact that higher returns would be available to farmers through a lower carry-over. Even if the quota is not increased, farmers will probably plant larger acreages in the coming season, particularly in New South Wales, to guarantee individual quotas. Additionally, there is probably little concurrence by growers that the carryover should be less than projected stocks at the end of November 30, 1971, even though such levels are manageable and reasonable.

Present indications of the wheat industry thinking in terms of considering wheat as a heterogeneous product is somewhat negated by thinking of carryover as a homogeneous quantity, as a balanced carryover composed of several wheat qualities in the magnitude of 100 million-150 million bushels is conceivable.

The result will probably be an increased national quota in the order of 10 million-15 million bushels, a suitable figure which will be readily accepted by the Wheat Industry but reluctantly by the Government.

Western Australia examines market prospects for wheat. - In terms of marketing, the importance of treating wheat as a heterogeneous quantity, rather than homogeneous, has gained considerable attention in Australia over the past few years. Dr. Callaghan, retiring Chairman of the Australian Wheat Board has questioned the value of the F.A.Q. system and has suggested that a grading system be implemented, as have other leaders in the industry. Changes in varietal recommendations in the various States are evidence of the general trend towards specifying wheat production for definite end uses, as areas are zoned in reference to the type of wheat which can be grown rather than as arbitrary geographical regions.

The Department of Agriculture in Western Australia has recently analysed the type of wheat which can be grown in various producing areas of the State and what is required by export markets. Initially, particular reference has been made to Japan and China, but realizing the need to examine the requirements of other customers in assessing policies to be designed for improving wheat quality.

The Department of Agriculture has suggested that particular varieties in given areas be segregated, thus supplying a number of types of wheat each suitable for a particular market.

Present suggestions are that four basic classes of wheat be grown. A hard wheat with a protein level of more than 10.5 per cent, can be grown for bread-making, while a soft wheat of an intermediate protein level (9.5-10 per cent) could be produced for markets in Japan and China for the production of noodles and steamed bread. Various wheat varieties producing a lower protein level of 9 per cent could be grown to supply suitable material in the biscuit trade and a cake wheat from very low protein areas with a protein content preferably less than 8.5 per cent could be produced.

These types of wheat could be readily grown in Western Australia owing to the various soil and climatic conditions in the State. Studies are being conducted to determine the quantities of such grades which are presently grown but not segregated. Additionally, surveys will be made to roughly determine suitable quantities to meet market requirements.

As in other States, rainfall patterns significantly influence the type of wheat which can be grown and thus Western Australia can be readily zoned on such a basis in order to produce wheat of a particular type with specific characteristics. Different varieties can be recommended for each of the zones which have specific precipitation patterns and soil types to produce the four types of wheat set out by the Department of Agriculture. As the exercise is long term, suitable varieties can be developed and methods for adequate segregation determined as well as predicting reserves which may be required resulting from seasonal variability. These factors can be considered as costs applicable to producers which must be weighed against the probability of increased returns by producing wheat for specific markets.

Increased emphasis on the aspects of tailoring wheat production for particular end uses will be made in all States. Assuming success in the segregation and production of different types of wheat, changes in legislation in regard to the Stabilization Scheme may be required and appropriate steps taken when the next five year stabilization scheme is reviewed. The Australian Wheat Board will play an important role in determining the requirements of overseas markets, and new appointments to the Marketing Servicing and Research Unit of the Australia Wheat Board will be important in the specification of new wheat grading standards and assisting advisors in the industry in disseminating such information to growers.

Grain alcohol plant proposed in Western Australia. — The proponents of the scheme to produce grain alcohol in Western Australia have taken a further step to realise their ambition through the proposed formation of a company, Graincol Pty. Ltd. to investigate the establishment of a plant.

The company plans to seek public subscription if the viability of grain alcohol production can be proven on a practical basis. The proposed scheme has not been advocated in the other States being largely confined to Western Australia. The Commonwealth Government has been consistently bombarded by submissions regarding the proposal but has not been enthusiastic about the scheme.

Even though a company has been formed to investigate the possibility of establishing a grain alcohol plant, the Western Australia Grain Alcohol Liaison Committee, once again, proposes that the Commonwealth Government undertake a complete and authoritative study on the economics of the scheme. Initially the proposal was to use

wheat, however, it is now suggested that alternative crops such as barley could be used, which would eliminate problems inherent in the wheat legislation and yet alleviate production controls in the wheat industry by offering wheat growers an alternative crop which could be grown on a large scale.

Experience gained in other countries and reports regarding the viability of such schemes does not seem to have been fully considered by the proponents, even though many of the conditions are similar.

New Australian Wheat Board chairman. — Mr. J.P. Cass has been appointed as Chairman of the Australian Wheat Board, succeeding Dr. A.R. Callaghan, who is retiring after six years in the position.

Mr. Cass will be the Board's sixth full-time chairman and the third wheat grower to fill the position. Although Mr. Cass has been involved in the politics of wheat for many years, he has declared that he will act as an independent chairman at all times.

Mr. Cass has been closely associated with the Australian Wheat Board since 1952 as a grower member from New South Wales. He has, consequently, travelled widely with the Australian Wheat Board and has had considerable experience in Australia's wheat export negotiations.

In addition to the Australian Wheat Board, Mr. Cass has been chairman of the Wheat Industry Research Committee for New South Wales and has been active in several producer organizations at both State and Commonwealth levels.

Mr. Cass has predicted that Australia would eventually regain the Chinese market, an outlet which has been referred to by the Minister for Primary Industry, Mr. Sinclair as being a definite prospect. Whether or not a sale is being negotiated by Australia is not known, as the Australian Wheat Board has only stated that contact has been continued with the Chinese.

CALENDAR OF WHEAT EVENTS

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|----------|----|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| October | 22 | Wheat stocks in all positions in the United States on October 1, 1971 were estimated at 1,876 million bushels, 4 per cent above a year earlier and the highest October stocks since 1963. |
| November | 9 | According to a report from Mr. H.G. Fairfield, Assistant Commercial Secretary (Agriculture) for Canada, Buenos Aires, the third estimate of the area seeded to wheat in Argentina is up 70,000 hectares (173,000 acres) to 4,720,000 hectares (11,658,000 acres) in comparison to the previous estimate. |
| | 15 | According to the Bureau of the Census, United States Department of Commerce, wheat flour production in the United States in September 1971 amounted to 22,130,000 hundredweight, averaging 1,054,000 hundredweight per working day. This compared with an average output per working day of 1,007,000 hundredweight last month and 1,055,000 hundredweight in September 1970. Wheat flour mills during September operated at 106.0 per cent of capacity, compared with 100.6 per cent and 104.2 per cent, respectively, |

for the previous month and the same month a year ago. Flour mills in September 1971 ground 49,279,000 bushels of wheat compared with 49,403,000 bushels the previous month and 49,361,000 bushels in September 1970.

- November 18 According to a report received from Mr. R.A. Groundwater, Assistant Commercial Secretary for Canada, Melbourne, stated that the estimated wheat production in Australia in 1971 is approximately 295 million bushels of which 272 million bushels are expected to be delivered to the Australian Wheat Board.
- 19 Based on conditions at November 19, Canada's 1971 wheat crop was estimated at 523.7 million bushels, 58 per cent above last year's 331.5 million bushels but 14 per cent below the ten-year average of 609.5 million bushels.

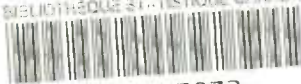
The following information pertaining to the Canadian Wheat Board quota policy for the 1971-72 crop year has been extracted from the Board's Instructions to the Trade re Quotas:

Alberta Red Winter Wheat No. 2 — effective Monday, November 22, 1971, at all delivery points within the designated area a "B" quota for Alberta Red Winter Wheat is hereby authorized at a level of two(2) bushels per quota acre assigned to Alberta Red Winter Wheat as shown in the individual producer's permit book.

Soft White Spring Wheat No. 3 — In accordance with the 1971-72 quota policy as previously announced, effective Friday, December 31, 1971, at all delivery points within the designated area the "A" quota for Soft White Spring Wheat is hereby cancelled. This quota was at a level of five (5) bushels per quota acre.

Producer's who fail to delivery on the "A" quota prior to its termination will lose that delivery privilege.

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