

DOES NOT CIRCULATE

NE PAS PRÊTER

The wheat review

5132
7628

STATISTICS CANADA STATISTIQUE CANADA

DEC 18 1973

LIBRARY
BIBLIOTHÈQUE

NOVEMBER 1973



STATISTICS CANADA

Agriculture Division

Crops Section

THE WHEAT REVIEW

NOVEMBER 1973

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

December 1973
5-3102-502

Price: 30 cents
\$3.00 a year

Vol. 44 —No. 4

Statistics Canada should be credited when republishing all or any part of this document

Information Canada
Ottawa

TABLE OF CONTENTS

	<u>Page</u>
<u>World Wheat Situation</u>	
August-October Exports at Record High	5
Wheat Supplies of Four Major Exporters Down from a Year Ago	5
World Grain Supplies Improve	6
<u>Canadian Situation</u>	
Supplies Decline from Year Ago	8
Exports Lower than Previous Year	9
Marketings, Disappearance and Visible Supplies	9
October 1973 Exports of Wheat and Flour, Total 42.4 Million Bushels	10
Re: Feed Mills	11
Wheat Board Announces 1972-73 Final Payment	11
Changes in Domestic Feed Grain Prices Announced	11
Shipment of High Moisture Grain is Held Up Because of Serious Transportation Delays	12
Wheat Shipments from Churchill During 1973 Season	13
General Quotas 1973-74 C.N.R. and C.P.R. Blocks	14
General and Special Quotas	16
Lake Shipments of Canadian Grain	17
Advances Issued Under the Prairie Grain Advance Payments Act	17
Rail Shipments of Wheat from Thunder Bay	18
Overseas Exports of Canadian Grain by Ports of Loading	18
Wheat Shipments to the United States by Destination	19
Rail Shipments of Wheat to Maritime Ports	19
Farmers' Marketings	19
Visible Supply of Canadian Wheat	20
Grading of Wheat Inspected, August-October 1973 with Comparison	20
Weekly Visible Supply and Farmers' Marketings (charts)	21
Canada's 1973 Wheat Crop Estimated at 628.7 Million Bushels	22
Shipments Under Feed Grain Assistance Regulations	24
Monthly Exports of Canadian Wheat and Wheat Flour	25
Exports of Canadian Wheat by Destination	26
Customs Exports of Canadian Wheat Flour by Countries of Consignment	30
Canadian Wheat Board Weekly Average Cash Wheat Prices	32
<u>Canadian Flour Milling Situation</u>	
Production and Exports	33
<u>United States Situation</u>	
Supplies Lower than 1972-73	34
Exports Continue at High Level	34
Stocks of Wheat in All Positions October 1, 1973	35
U.S. Wheat and Flour Exports Set Record in Fiscal 1973	36
Winter Wheat Seeding Nears Completion	39
Summary of the Wheat Situation	39
Flour Production	40
<u>Australian Situation</u>	41
<u>Argentine Situation</u>	47
<u>Wheat Situation in Britain</u>	49
<u>Grain Situation in Italy</u>	50
<u>Grain Situation in India</u>	51
<u>Wheat Situation in Federal Republic of Germany</u>	51
<u>Calendar of Wheat Events</u>	52

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.

Due to rounding, the sums of individual items
may not agree exactly with the totals.

WORLD WHEAT SITUATION

August-October Exports
at Record High

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 560.8 million bushels, 14 per cent above the 492.9 million exported during the same three months in 1972 and 49 per cent more than the ten-year (1962-71) average shipments for the first quarter of the crop year, of some 376.7 million bushels. As indicated in the accompanying table, based on the Canadian crop year, United States registered an increase over the 1972-73 comparable total, while exports from Canada, Australia and Argentina were lower.

Exports of Wheat and Flour in Terms of Wheat, August - October 1973
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	5.3	350.1	
1968	94.4	52.0	128.6	17.2	292.2	43.7
1969	58.7	75.7	123.4	16.9	274.7	53.7
1970	131.2	91.1	192.1	21.9	436.3	31.7
1971	160.0	80.1	148.8	5.1	394.0	57.9
1972 ^r	180.1	58.8	237.0	17.0	492.9	72.2
1973 ^p	116.3	20.3	416.6	7.6	560.8	..

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, 1973 in the four major exporting countries, for export and for carryover at the end of their respective crop years, amounted to 1,648.4 million bushels, some 24 per cent below the 2,173.7 million available a year ago. This decrease reflected smaller supplies in Canada, Australia and United States which more than offset an increase in Argentina. Supplies on or about November 1, 1973, in millions of bushels, were held as follows, with last year's comparable figures in brackets: Canada, 708.4 (763.1); Australia, 25.1 (72.0); United States, 870.7 (1,316.8); and Argentina, 44.2 (21.8).

Exports of Wheat and Flour in Terms of Wheat, August - October 1973
with Comparisons

August-October	Canada	Australia	United States	Argentina	Total	France
million metric tons						
1950	1,342	841	1,399	468	4,050	
1951	2,052	830	3,157	487	6,526	
1952	2,575	626	2,316	—	5,517	
1953	2,155	452	1,491	885	4,983	
1954	2,009	585	1,464	917	4,975	
1955	1,636	631	1,481	822	4,570	
1956	2,215	1,113	3,233	659	7,220	
1957	2,000	678	2,741	593	6,012	
1958	2,009	441	2,945	582	5,977	
1959	2,077	555	2,730	411	5,772	
1960	2,226	754	4,104	694	7,778	
1961	2,890	1,521	4,899	166	9,477	
1962	2,305	631	3,816	237	6,989	
1963	3,799	1,287	5,228	346	10,660	
1964	3,641	1,018	5,049	724	10,432	
1965	4,940	1,530	5,536	1,919	13,924	
1966	4,681	1,124	6,616	528	12,949	
1967	1,935	2,022	5,427	144	9,528	
1968	2,569	1,415	3,500	468	7,952	1,189
1969	1,598	2,060	3,358	460	7,476	1,461
1970	3,571	2,479	5,228	596	11,874	863
1971	4,354	2,180	4,050	139	10,723	1,576
1972 ^r	4,902	1,600	6,450	463	13,415	1,965
1973 ^p	3,165	552	11,338	207	15,263	..

World Grain Supplies Improve

A report released on October 26, 1973 by the Foreign Agricultural Service, United States Department of Agriculture stated that crop outturns have exceeded earlier expectations in much of both East and Western Europe, and prospects for the Australian wheat crop and the Asian rice crop also indicate higher levels of production than expected earlier. Significantly, there has been no important grain producing area where crop prospects have deteriorated since the last report. Partly offsetting these supply improvements, however, is the fact that the estimates of total import requirements have been revised upward by about 5 per cent for both wheat and feedgrains. These increases in estimated import levels arise mainly with a number of countries of Africa, Asia, and Latin America where continued heavy import purchases in spite of increased world prices indicate higher import estimates for both 1972-73 and 1973-74.

World wheat production in 1973 is currently estimated at a record level of about 355 million tons, up 7 per cent from last year and 4 per cent above the previous record in 1971.(1) Although beginning wheat stocks were down at the start of the 1973-74 season, this has been largely offset by the record 1973 production.

(1) See footnote on page 8.

Total import demand is forecast about 4 1/2 per cent below the exceptionally high level experienced in 1972-73. Of the major trading areas, only the Soviet Union is expected to show a sharp decline in imports during 1973-74. However, increased imports, especially in the PRC, Africa and Asia, offset the near 9 1/2 million-ton decline expected in wheat shipments to the Soviet Union.

Larger wheat supplies will be available for shipment during 1973-74 in all of the major exporting areas except Argentina, where excessive rainfall has reduced acreage and yield of the crop to be harvested beginning December. U.S., and West European wheat shipments will approach last year's record levels. Canadian exports are forecast at about the 1971-72 level. In Australia, the large crop to be harvested beginning December will be about double last year's drought-affected production. But since this new crop supply will not be available for export until the beginning of 1974, Australia's exports in 1973-74 will only about equal the long-term average. Large 1973 wheat production in the USSR should enable that country to approach an import/export balance.

The principal changes occurring in the world wheat situation since the last publication in this series involve both supply and demand. On the supply side, there is an improved outlook for Australian wheat production, while in other major producing areas such as the U.S., Canada, Western Europe, and the USSR, the optimistic outlook for production has been further confirmed. Export estimates for 1973-74 have been increased for Western Europe, Eastern Europe and the United States. At the same time, the Canadian export estimate has been reduced somewhat. As for imports, estimates for 1973-74 have been revised upward for imports into Asia, Africa and Latin America. For Eastern and Western Europe, there has been continued favourable wheat production developments leading to a slight reduction in estimated import needs of those countries.

Current data indicate a substantial increase in world feedgrain production in 1973-74 to an estimated level of about 578 million metric tons(1) -- about 34 million tons above the revised 1972-73 production. This record production has resulted from increases in both yields and area planted.

Weather and crop conditions have improved considerably over last season in several major producing areas. Output by the major exporters in 1973 is expected to exceed 244 million metric tons--about 8 per cent above 1972. Production is up in nearly all major producing areas. Feedgrain output in the USSR, recovering from an exceptionally poor crop in 1972, is expected to reach an estimated record 85 million metric tons (gross weight)(1) -- nearly 15 million tons above a year ago. Coarse grain production has or is expected to return to normal levels in Australia, South Africa and Thailand, after drought had reduced output severely in these countries in 1972. Monsoon rains in South Asia have also improved conditions for crops to be harvested in the fall of 1973.

Foreign import demand for feedgrains will continue strong in 1973-74 and prices are expected to remain firm. Larger imports are expected by Japan (+9 per cent) as livestock production continues to expand. Western European imports should also rise by about one million tons totalling 29 million tons in 1973-74. Further import increases are expected in South Korea, Taiwan and the PRC.

(1) See footnote on page 8.

Feedgrain exports by the major exporting countries are estimated at 52 1/2 million metric tons in 1973-74—about 2 1/2 million tons above the previous year. The U.S. is expected to account for about 37.3 million tons of the total exports. Exports by the major competitors are expected to exceed 15 million metric tons—an estimated 700,000 tons more than the previous year.

The U.S. will continue to be the major supplier of feedgrains. Carry-out stocks in the major competitor countries are expected to decline further in 1973-74 despite higher production. U.S. feedgrain stocks on June 30, 1974 have been estimated at 52.3 million metric tons (-5.4 million tons). Stocks in the selected competitor countries are also forecast to be nearly 1 1/2 million tons lower by the end of 1973-74, reflecting higher world imports (+5 1/2 per cent). U.S. coarse grain output (including rye) for 1973 has been forecast at 191.9 million tons—5 1/2 per cent above the previous year and a record harvest. The 1973 crop was achieved on about 102.4 million harvested acres—8.3 million acres more than the previous year.

Since the last report in this series, several revisions have been made. Preliminary data indicate that South Africa exported about 3.3 million metric tons of feedgrains in 1972-73—higher than previously estimated. Feedgrain exports from Western Europe for the year ending June 30, 1973 were also higher—totalling 11 million metric tons. The significant changes on the import side in 1972-73, compared to data in FG-11, August 24, 1973, were a reduction in feedgrain imports to Western Europe (-1.9 million tons) and increased imports into Eastern Europe (+0.5 million tons), Japan (+0.5 million tons). In addition there is an increase of about 3 million tons in the amount of feedgrains going to "all other" markets. Increased quantities in a transit position, between exporting and importing countries, are believed to account for a major portion of this increase.

Latest available data for 1973-74 indicates that Western Europe is now expected to export about 11.5 million tons of feedgrains (including intra-EC trade)—2.0 million tons higher than estimated in FG 11-73. The reason for the increase is that 1973 coarse grain output in Western Europe is forecast at 81.9 million metric tons -- about 2 per cent above the previous year.

On the import side, Western Europe's requirements for feedgrains are now estimated at 29 million metric tons—1 million tons below the earlier estimate. East European and PRC import estimates have been increased to 3.7 million metric tons and 2.5 million metric tons, respectively. Trade with other countries is also forecast to increase moderately from 1972-73.

(1) Beginning with the current report, production figures and estimates for all years for the USSR are expressed in terms of gross weight, the same as official Soviet data; this adjustment causes a corresponding increase in all data for total world production.

CANADIAN SITUATION

Supplies Decline from Year Ago Total estimated supplies of wheat for the 1973-74 (August-July) crop year are placed at 994.7 million bushels consisting of the August 1 carryover of 366.0 million and the 1973 crop, now estimated on the basis of conditions at October 22, at 628.7 million bushels. Supplies of the size indicated represent a decrease of 11 per cent from the 1,117.0 million bushels of 1972-73. After making an allowance of 170.0 million bushels for

anticipated domestic requirements, supplies available for export and for carryover during 1973-74 amount to 824.7 million, some 13 per cent less than the 943.2 million in 1972-73.

Exports Lower than Previous Year

Exports of wheat and flour, in terms of wheat equivalent, during August-October 1973 amounted to 116.3 million bushels, 35 per cent less than the 180.1 million exported during the same three months of 1972. This year's exports consisted of 111.8 million bushels of wheat in bulk, 172 thousand of seed and 4.3 million of flour in terms of wheat. During the August-October period last year these figures were 173.8 million of wheat in bulk 50 thousand of seed and 6.3 million of flour in wheat equivalent. The balance remaining on November 1, 1973 for export and for carryover amounted to 708.4 million bushels, 7 per cent below the November 1, 1972 total of 763.1 million.

Canadian Wheat Supplies

Item	1972-73 ^r	1973-74 ^p
	million bushels	
Carryover in North America at beginning of crop year (August 1)	583.8	366.0
Production	533.3	628.7(1)
Total estimated supplies	1,117.0	994.7
Less estimated domestic requirements for crop year	173.9	170.0
Available for export and for carryover	943.2	824.7
<u>Deduct</u>		
Exports of wheat in bulk, August-October (2)	173.8	111.8
Exports of seed wheat, August-October (3)	0.1	0.2
Total exports of wheat as grain	173.8	112.0
Exports of wheat flour in terms of wheat, August-October (3)	6.3	4.3 ^r
Total exports of wheat and wheat flour	180.1	116.3
Balance on November 1 for export and for carryover	763.1	708.4

(1) Based on November forecast of production.

(2) As reported by the Canadian Grain Commission.

(3) Customs returns, 1972-73 adjusted for time lag.

Marketings, Disappearance and Visible Supplies

Total primary deliveries of wheat (both east and west) up to November 7 of the current crop year have amounted to 146.1 million bushels in sharp contrast to the 235.8 million marketed during the same period of the previous year. Some 46.9 million bushels of this year's total were delivered during the four weeks October 11 to November 7. During the same period the volume of Canadian wheat entering domestic and export channels amounted to 44.7 million bushels. As a result, the total visible supply of Canadian wheat increased from 248.0 million at October 10 to a level of 251.1 million at November 7, 1973.

The total visible supply of Canadian wheat at November 7 this year was 14 per cent less than the 1972 comparable total of 292.6 million and 19 per cent below the 1971 figure of 309.0 million. Country elevator stocks, amounting to 157.4 million bushels, were 3 per cent above the 1972 comparable total of 153.2 million, but 12 per cent less than the 178.8 million of two years ago. Wheat stocks at interior terminals at November 7, 1973, at 0.6 million bushels, decreased sharply from the 3.0 million of 1972 and the 6.6 million of 1971. The 17.3 million bushels "in transit rail" (western division) increased by 13 per cent over the 15.3 million of 1972 but was 8 per cent lower than the 18.9 million in this position in 1971. Supplies at the Lakehead, totalling some 18.5 million bushels, registered a 46 per cent decline from last year's comparable level of 34.3 million and was 10 per cent below the 20.6 million of 1971. Stocks "in transit lake", amounting to 7.4 million bushels were considerably smaller than the 10.7 million of 1972 but 33 per cent more than the 5.5 million of two years ago. The 13.3 million bushels in Bay, Lake and Upper St. Lawrence ports were lower than the 30.8 million of the preceding year and the 37.4 million two years ago. Supplies in Lower St. Lawrence and Maritime ports at November 7, 1973, at 29.0 million bushels, registered a decline of 2 per cent from the 29.6 million of a year ago and were 6 per cent less than the 30.7 million at the same date in 1971. The 3.7 million bushels in West Coast ports (Vancouver-New Westminster, Prince Rupert and Victoria) were smaller than both the 8.9 million at November 8, 1972 and the 4.9 million at the comparable date in 1971.

October 1973 Exports of
Wheat and Flour Total
42.4 Million Bushels

Combined exports of wheat in bulk, seed wheat and wheat flour in terms of grain equivalent during October 1973 amounted to 42.4 million bushels, 55 per cent more than the September 1973 total of 27.3 million but 40 per cent smaller than the 70.4 million of October 1972 and 4 per cent less than the ten-year (1962-71) average for the month of October of 44.1 million.

Exports of wheat in bulk during October 1973 (as reported by the Canadian Grain Commission), amounted to 40.3 million bushels, registering an increase of 57 per cent over the September 1973 exports of 25.8 million, but declined by 41 per cent and 2 per cent respectively, from the 68.9 million of the previous year and the ten-year average of 41.3 million. Exports of seed wheat during October 1973 based on Canadian Customs returns, amounted to some 119 thousand bushels as against the October 1972 total (adjusted to remove time lag) of 13 thousand bushels. Customs returns also indicate that the equivalent of 2.0 million bushels of wheat was exported in the form of flour during October 1973, 30 per cent above the September 1973 figure of 1.5 million and 28 per cent more than the October 1972 total (adjusted for time lag) of 1.5 million but 28 per cent below the ten-year average of 2.7 million.

Cumulative exports of wheat in bulk during the August-October period of the current crop year amounted to 111.8 million bushels, 36 per cent below the 173.8 million shipped during the first three months of the 1972-73 crop year and 3 per cent less than the average for the period of 114.9 million. U.S.S.R. (Russia) was the leading market for wheat in bulk during the first three months of the current crop year with shipments amounting to 29.5 million bushels and accounted for 26 per cent of the August-October total in contrast to 31 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: Britain, 14.0 (11.8); Japan, 13.2 (9.9); People's Republic of China, 12.6 (46.2); Brazil, 7.6 (6.7); India, 6.1 (nil); Bangladesh, 4.3 (2.6); and Germany, West, 4.1 (3.8). Cumulative exports of seed wheat during August-October of the current crop year, based on Canadian Customs returns, amounted to 172 thousand bushels as against last year's comparable total (adjusted to remove time lag) of 50 thousand.

Cumulative exports of wheat flour during the first quarter of the 1973-74 crop year, based on Customs returns, were the equivalent of 4.3 million bushels of wheat, 31 per cent below the comparable 1972-73 figure of 6.3 million bushels (adjusted for time lag) and 42 per cent lower than the ten-year average for the period of 7.5 million.

Exports of wheat flour by countries for August-October 1973, based on Customs data, are not available.

Re: Feed Mills Under date of October 24, The Canadian Wheat Board in its Instructions to the Trade No. 21 for the 1973-74 Crop Year announces provisions whereby 1973-74 delivery permit holders with permit books designating delivery points in the Provinces of Manitoba, Saskatchewan or Alberta are authorized to deliver outside of delivery quota regulations supplies of grain to any feed mill within the Provinces aforementioned. The holders of 1973-74 delivery permit books designating delivery points in the Province of British Columbia are authorized to deliver outside of delivery quota regulations supplies of grain to feed mills located in the Province of British Columbia.

Wheat Board Announces On November 6, 1973 the Canadian Wheat Board announced
1972-73 Final Payments final payments averaging 47.45 cents per bushel on wheat, 51.63 cents per bushel on barley and 40.80 cents per bushel on oats for producer deliveries during the 1972-73 crop year, were announced today by the Canadian Wheat Board.

Mailing of the 352,403 cheques involved in the final payment, along with a pamphlet giving producers a breakdown of the Wheat Board's 1972-73 Pool Accounts, will start next week.

The final payments on grain delivered to the Wheat Board during the 1972-73 crop year involves the distribution of over \$374 million. This is the net amount still owing to producers from the sale of their grain by the Wheat Board in Canadian and overseas markets. The payment for wheat also includes funds received from the Government of Canada under the provisions of the Temporary Wheat Reserves Act.

The 1972-73 final payments, together with the higher initial prices received at country elevators, will give producers the highest cash return on grain since World War II. As shown in the pamphlet accompanying each cheque, the realized price on grain delivered during the 1972-73 crop year averaged \$2.25 per bushel for wheat, \$1.52 for barley and \$1.10 on oats. Marketing charges, covering freight, handling, a carrying costs, and the Wheat Board's administrative costs, are deducted from these totals to give producers their net return.

Final payment cheques are mailed separately for wheat, barley and oats. Mailing will take about three to four weeks to complete. The total payment each producer receives depends on the quantities and grades of grain he delivered during the crop year.

Changes in Domestic On November 19 the Canadian Wheat Board stated that changes
Feed Grain Prices in domestic selling prices for Prairie feed grains were
Announced announced as a result of the latest survey of "off-Board" prices carried out by the Agricultural Products Board.

The prices, established under the provisions of the federal government's new feed grains policy, will go into effect immediately. The domestic prices, basis Thunder Bay or Vancouver, are as follows:

No. 3 Canada Western Red Spring Wheat \$3.67 5/8 per bushel;
No. 1 Feed Barley \$2.32 5/8 per bushel;
No. 1 Feed Oats \$1.47 per bushel.

Under the provisions of the new federal policy, the Wheat Board's domestic selling prices for Prairie feed grains are adjusted in accordance with the latest survey of "off-Board" prices carried out by the Agricultural Products Board. The surveys, determining the weighted-average price of feed grains purchased by Prairie feed mills, feed lots, hog operators and poultry and egg producers are carried out every two weeks.

The "off-Board" prices established by the latest survey carried out by the Agricultural Products Board were as follows (prices from the survey two weeks ago are shown in brackets): Wheat, \$3.25 3/8 per bushel (\$3.16); barley, \$2.04 per bushel (\$2.03 1/4); and, oats, \$1.23 1/2 per bushel (\$1.26 5/8).

The marketing charges, covering freight, country elevator handling charges, carrying charges, dockage and the Wheat Board's administrative costs, remained unchanged. As agreed to previously by the Wheat Board and the Canadian Livestock Feed Board, the marketing charges have been set at 42 1/4 cents per bushel for wheat, 28 5/8 cents for barley and 23 1/2 cents for oats.

The marketing charges are added to the weighted-average off-Board prices to establish the actual domestic selling prices at Thunder Bay and Vancouver.

Shipment of High Moisture Grain is Held up Because of Serious Transportation Delays

On November 1 the Canadian Wheat Board announced that grain producers in northern areas of the three Prairie provinces are being asked to dry as much of the high-moisture grain harvested this year as possible.

A recent survey carried out by the Canadian Wheat Board showed that at least 150 million bushels of Prairie grain were harvested in a tough and damp condition and because of serious transportation delays the bulk of this grain will have to be dried by farmers themselves.

C.W. Gibbings, Commissioner of the Canadian Wheat Board, said that with the critical grain car shortage only limited quantities of high-moisture grain can be moved to terminals for drying before the close of navigation.

"Rail shipments from country elevators are now about 75 million bushels behind schedule," Mr. Gibbings said, "and almost every available railway car is required to move the grain actually needed to meet sales commitments this fall and winter".

Mr. Gibbings said that everything possible would be done to get as much of the tough and damp grain moved as possible but the problem is that the bulk of the high-moisture grain is not the kind and grade now needed at export terminals.

"The export terminals are already scrambling for every available bushel to load waiting vessels and any further delays that would result with a large movement of high-moisture grain could jeopardize our export contracts," Mr. Gibbings said.

Delays in grain shipments have also contributed towards congestion in country elevators. As a result, total grain deliveries by producers are now over 60 million bushels below those on the same date last year.

"Lack of elevator space has imposed a hardship to many farmers, particularly those who had to harvest their crops in a tough and damp conditions," Mr. Gibbings said. "However, if our transportation requirements can be met, we expect that producers will still be able to deliver all their available grain before the end of the present crop year".

The Wheat Board survey showed that as much as 70 per cent of this year's crop was harvested in a high-moisture condition in some northern areas. A breakdown by grains shows that nearly 90 million bushels of wheat, 50 million bushels of barley and 10 million bushels of oats were harvested in a tough and damp condition.

Because of the critical transportation situation, shipments of high-moisture grain will be restricted to those kinds of grains that are needed to meet sales commitments. As a result shipments of high-moisture grains will be confined to oats and barley to Thunder Bay, wheat and barley to Vancouver and wheat only to Prince Rupert.

Wheat Shipments from
Churchill During
1973 Season

Shipments of wheat from the port of Churchill during the 1973 season of navigation amounted to 9.8 million bushels in contrast to last year's figure of 16.3 million and ten-year 1962-71 average of 22.2 million.

Ocean Shipments of Wheat from Churchill Season of Navigation, 1933-73

Year	Wheat	Year	Wheat
	thousand bushels		thousand bushels
1933	2,708	1953	10,784
1934	4,050	1954	12,485
1935	2,407	1955	13,078
1936	4,294	1956	16,250
1937	604	1957	16,577
1938	917	1958	19,599
1939	1,772	1959	21,787
1940	—	1960	19,582
1941	—	1961	19,353
1942	—	1962	21,525
1943	740	1963	22,864
1944	—	1964	21,645
1945	—	1965	24,707
1946	2,929	1966	21,817
1947	4,976	1967	20,639
1948	5,314	1968	22,516
1949	5,528	1969	21,873
1950	6,768	1970	23,551
1951	7,278	1971	20,570
1952	8,585	1972	16,279 ^r
		1973	9,799

General Quotas 1973-74 as at Tuesday, November 12, 1973
Canadian National Railway Blocks

No.	Name	Wheat (all others)	Utility wheat	Durum		Hercules Durum
		A	A	A	B	
bushels per quota acre						
01	Winnipeg N. ...	5	5	5	5	
03	Winnipeg S. ...	5	5	5	5	
05	Winnipeg W. ...	5	5	5	5	
07	Brandon N. ...	5	5	5	5	
09	Brandon W. ...	5	5	5	5	
11	Melville	5	5	5	5	
13	Dauphin	5	5	5	5	
15	Kamsack	5	5	5	5	
17	Saskatoon M. ..	5	5	5	5	
19	Saskatoon S. ..	5	5	5	5	
21	Saskatoon W. ..	5	5	5	5	
23	Saskatoon N. ..	5	5	5	5	
25	Pr. Albert E. .	5	5	5	5	
27	Pr. Albert S. .	5	5	5	5	
29	Pr. Albert W. .	5	5	5	5	
31	Saskatoon E. ..	5	5	5	5	
33	Regina S.	5	5	5	5	
35	Regina W.	5	5	5	5	
37	Biggar N.	5	5	5	5	
39	Biggar W.	5	5	5	5	
41	Edmonton N. ...	5	5	5	5	
43	Edmonton S. ...	5	5	5	5	
45	Edmonton W. ...	5	5	5	5	
47	Hanna S.	5	5	5	5	
49	Hanna W.	5	5	5	5	
90	Nar West	5	5	5	5	
98	G.S.L.	5	5	5	5	

General Quotas 1973-74 as at Tuesday, November 12, 1973
Canadian Pacific Railway Blocks

No.	Name	<u>Wheat (all others)</u>	<u>Utility wheat</u>	<u>Durum</u>		<u>Hercules Durum</u>
		A	A	A	B	
bushels per quota acre						
61	Keewatin	5	5	5		5
62	La Riviere	5	5	5		5
63	Carberry	5	5	5		5
64	Brandon	5	5	5		5
71	Weyburn	5	5	5		5
72	Pasqua	5	5	5		5
73	Bulyea	5	5	5		5
74	Bredenbury	5	5	5		5
75	Saskatoon	5	5	5		5
76	Wilkie	5	5	5		5
77	Assiniboia	5	5	5		5
78	Swift Current .	5	5	5		5
79	Outlook	5	5	5		5
81	Medicine Hat ..	5	5	5		5
82	Brooks	5	5	5		5
83	Lethbridge	5	5	5		5
84	Vulcan	5	5	5		5
85	Calgary	5	5	5		5
86	Red Deer	5	5	5		5
87	Edmonton	5	5	5		5
95	N.A.R. East ...	5	5	5		5
	B.C. Stations .	5	5	5		5

General Quotas 1973-74 as at Tuesday, November 12, 1973

<u>A</u>		
bushels per quota acre		
Alberta Red Winter	5	All blocks
Soft White Spring	5	All blocks
Rye	20	All blocks
Flaxseed	15	All blocks
Rapeseed (other)	15	All blocks

Special Quotas 1973-74 as at Tuesday, November 12, 1973

Selected Soft White Spring wheat	Rail - 1 carlot (40 assigned acres)	All blocks
	Truck - 50 bushels per assigned acre	
Selected oats	Rail - 1 carlot (60 assigned acres)	All blocks
	Truck - 50 bushels per assigned acre	
Rye for distilleries	30 bushels per assigned quota acre	All blocks
Flaxseed for processors	20 bushels per assigned quota acre	All blocks
Rapeseed (low erucic acid)		
Rapeseed for crushers	25 bushels per assigned quota acre	All blocks
Two-Row barley	Extended to any additional carlots	All blocks
Six-Row barley	Extended to a second carlot	All blocks

Lake Shipments of Canadian Grain Total shipments of the six major grains out of Lakehead terminals from the opening of navigation to November 7 this year amounted to 351.3 million bushels, 26 per cent less than the comparable 1972 figure of 473.6 million but 17 per cent above the ten-year (1962-71) average for the period of 301.2 million. In 1973 the season of navigation opened on March 30 while the 1972 season opened on April 14. Shipments of wheat, at 237.9 million were 14 per cent below the 277.6 million of 1972.

Lake Shipments of Canadian Grain from the Opening of Navigation to November 7, 1973 and to Approximately the Same Date, 1962 to 1972

Year	Wheat	Oats	Barley	Rye	Flaxseed	Rapeseed	Total
thousand bushels							
1962	128,032	17,708	22,254	4,970	6,372	—	179,336
1963	173,889	35,942	29,298	2,886	5,039	—	247,054
1964	295,689	28,667	33,828	4,902	7,912	59	371,058
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	144,134	15,227	22,750	2,414	4,213	326	189,064
1969	121,825	15,127	39,058	1,798	6,849	1,178	185,834
1970	216,901	22,164	114,688	2,476	9,637	4,711	370,576
1971	251,450	22,290	132,119	4,401	13,280	12,412	435,951
1972	277,586	24,994	140,888	3,611	11,599	14,965	473,643
1973	237,870	14,013	77,448	2,691	9,028	10,268	351,317

Advances Issued Under the Prairie Grain Advance Payments Act

Requests are received concerning the level of cash advances issued and outstanding. This information from the Canadian Wheat Board will be carried in the Wheat Review as a regular feature.

Advances issued August 1 to November 23, 1973:

9,001 advances totalling \$27,044,376

Outstanding advances on November 23, 1973:

Issued in 1973-74 21,611,952
 Issued in 1972-73 96,757
 Issued in 1971-72 and prior 258,449
 Issued in 1970-71 and prior 2,049,764

Total outstanding advances \$24,016,922

Rail Shipments of Wheat from Thunder Bay 1970-71 - 1973-74

Month	1970-71	1971-72	1972-73	1973-74
	bushels			
August	169,566	181,419	208,597	147,240
September	244,549	195,721	193,397	199,219
October	176,450	128,382	97,166	205,142
November	178,523	158,083	313,262	
December	330,120	193,204	339,487	
January	525,019	1,420,522	625,164	
February	552,926	2,392,713	1,026,705	
March	418,387	1,728,504	650,493	
April	407,206	260,435	251,045	
May	187,347	189,234	223,640	
June	156,548	223,019	210,071	
July	200,415	141,665	256,160	
Total	3,547,056	7,212,901	4,395,187	

Distribution of Rail Shipments of Wheat from Thunder Bay, October 1973

Grade	Prince Edward Island	Nova Scotia	New Brunswick	Quebec	Ontario
	bushels				
1 C.W. Red Spring	—	—	—	—	2,000
2 C.W. Red Spring	—	—	—	—	4,000
3 C.W. Red Spring	8,000	37,167	97,667	28,800	3,000
1 Can. Utility	—	—	—	—	3,466
2 Can. Utility	—	—	—	17,042	4,000
Total	8,000	37,167	97,667	45,842	16,466

Overseas Exports of Canadian Grain by Ports of Loading,
August 1 - November 7, 1973 with Comparisons

Port	Wheat(1)	Durum wheat(1)	Oats(1)	Barley	Rye	Flax-seed	Rape-seed
	thousand bushels						
<u>Pacific Seaboard</u>							
Van. - New Westminster ..	37,977	497	71	10,292	895	998	8,164
Victoria	355	—	—	—	—	—	—
Prince Rupert	927	—	—	—	—	—	—
<u>Churchill</u>	9,849	—	—	9,048	—	—	—
<u>Thunder Bay Direct</u>	831	—	—	535	1,323	1,903	3,529
<u>St. Lawrence</u>							
Montreal	13,902	6,899	—	2,860	207	—	—
Sorel	3,387	177	—	858	—	—	—
Trois-Rivières	6,046	497	—	1,420	—	—	—
Quebec	4,644	906	—	627	—	745	235
Baie Comeau	13,580	1,277	—	5,051	156	—	—
Port Cartier	14,087	3,871	—	3,082	—	—	—
<u>Maritime Port</u>							
Halifax	269	—	—	—	—	—	—
Total	105,853	14,123	71	33,772	2,581	3,647	11,930
August 1 - November 8, 1972 .	170,992	21,843	1,251	43,912	2,728	6,194	14,725

(1) Excluding seed.

Wheat Shipments to the United States by Destination Total rail shipments of wheat to the United States, either for re-export or retention for domestic use, for the August 1 - November 7 period of the 1973-74 crop year amounted to 7,000 bushels. During the same period of 1971-72 vessel shipments amounted to 95,000 bushels.

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 1973 amounted to only 4,000 bushels compared with the August-October 1972 figure of 2,433,000 bushels.

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

Origin of shipments	August 1 - October 31, 1972	August 1 - October 31, 1973
	bushels	
Port McNicoll	862,610	4,000
Midland, Tiffin	1,570,517	-
Total	2,433,127	4,000

Farmers' Marketings Deliveries of wheat from farms in the Prairie Provinces up to November 7 of the current crop year amounted to 140.6 million bushels, 39 per cent below the comparable 1972 total of 111.4 million but 26 per cent more than the ten-year (1962-71) average for the period of 228.7 million bushels.

Farmers' Marketings(1) of Wheat in the Prairie Provinces 1973-74

Week ending	Manitoba	Saskatchewan	Alberta	Total	Last year
	bushels				
August 8, 1973 ..	-	50,143	-	50,143	5,025,148
15	-	190,009	38,211	228,220	4,025,683
22	1,657,641	2,028,800	1,645,290	5,331,731	17,193,810
29	937,694	8,970,755	2,804,882	12,713,331	16,694,633
September 5	2,389,810	7,052,089	2,240,705	11,682,604	20,288,150
12	770,246	9,274,583	1,810,084	11,854,913	18,672,141
19	2,282,726	10,108,515	1,869,119	14,260,360	19,788,457
26	1,758,977	8,281,744	5,548,413	15,589,134	11,112,424
October 3	1,638,890	8,219,300	769,398	10,627,588	8,143,985
10	1,249,505	8,077,122	2,640,662	11,967,289	20,000,709
17	1,249,785	10,017,734	3,528,484	14,796,003	27,031,181
24	1,320,030	6,868,548	3,345,672	11,534,250	26,307,685
31	1,034,077	7,586,618	2,891,319	11,512,014	16,383,292
November 7	1,259,891	5,073,418	2,106,100	8,439,409	18,006,561
Total	17,549,272	91,799,378	31,238,339	140,586,989	228,673,859

Average similar period: 1962-71 .. 14,759,274 72,374,138 24,272,782 111,406,194

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

Visible Supply of Canadian Wheat, November 7, 1973
Compared with Approximately the Same Date, 1971 and 1972

Position	1971	1972	1973
Primary elevators — Manitoba	20,860	15,298	12,978
Saskatchewan	108,872	97,876	106,834
Alberta	49,109	39,981	37,585
Sub-total	178,841	153,155	157,397
Process elevators	3,996	3,936	3,397
Interior terminals	6,617	3,041	625
Vancouver-New Westminster	4,110	6,746	2,959
Victoria	284	487	216
Prince Rupert	550	1,689	547
Churchill	982	1,831	253
Thunder Bay	20,592	34,329	18,455
In transit rail (western division)	18,882	15,342	17,340
Bay, Lake and Upper St. Lawrence ports	37,370	30,810	13,262
Lower St. Lawrence and Maritime ports	30,744	29,615	28,973
In transit lake	5,541	10,714	7,381
In transit rail (eastern division)	534	907	351
Total	309,043	292,602	251,156

Grading of Wheat Inspected, August-October 1973 with Comparisons

Grade	Crop year		August-October			
	1971-72	1972-73	1972		1973	
	per cent		cars	per cent	cars	per cent
1 C.W. Red Spring	60.1	57.4	65,094	63.4	36,979	63.0
2 C.W. Red Spring	19.8	14.6	17,103	16.7	7,454	12.7
3 C.W. Red Spring	1.8	7.5	4,379	4.3	2,869	4.9
1 Canada Utility	(1)	(1)	24	(1)	51	0.1
2 Canada Utility	—	(1)	4	(1)	3	(1)
3 Canada Utility	0.2	0.6	595	0.6	379	0.6
Others Red Spring	4.4	8.0	5,306	5.2	4,627	7.9
C.W. White Spring	0.3	0.4	61	0.1	374	0.6
C.W. Mixed Wheat	0.1	(1)	60	0.1	1	(1)
Alberta Winter	0.6	0.6	352	0.3	165	0.3
Nos. 1-6 C.W. Amber Durum ..	12.3	10.6	9,436	9.2	5,616	9.6
Other C.W. Amber Durum	0.3	0.3	193	0.2	219	0.4
Total	100.0	100.0	102,607	100.0	58,737	100.0

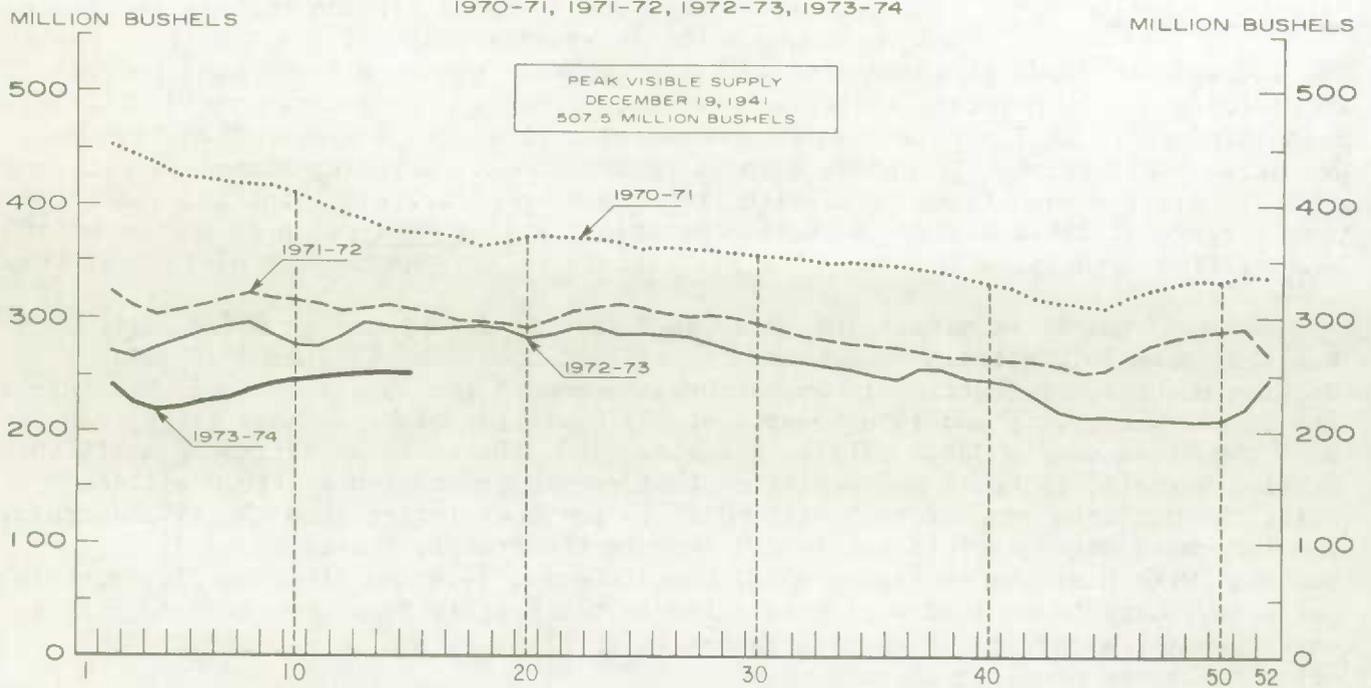
Gross bushels (approx.)

213,681,000

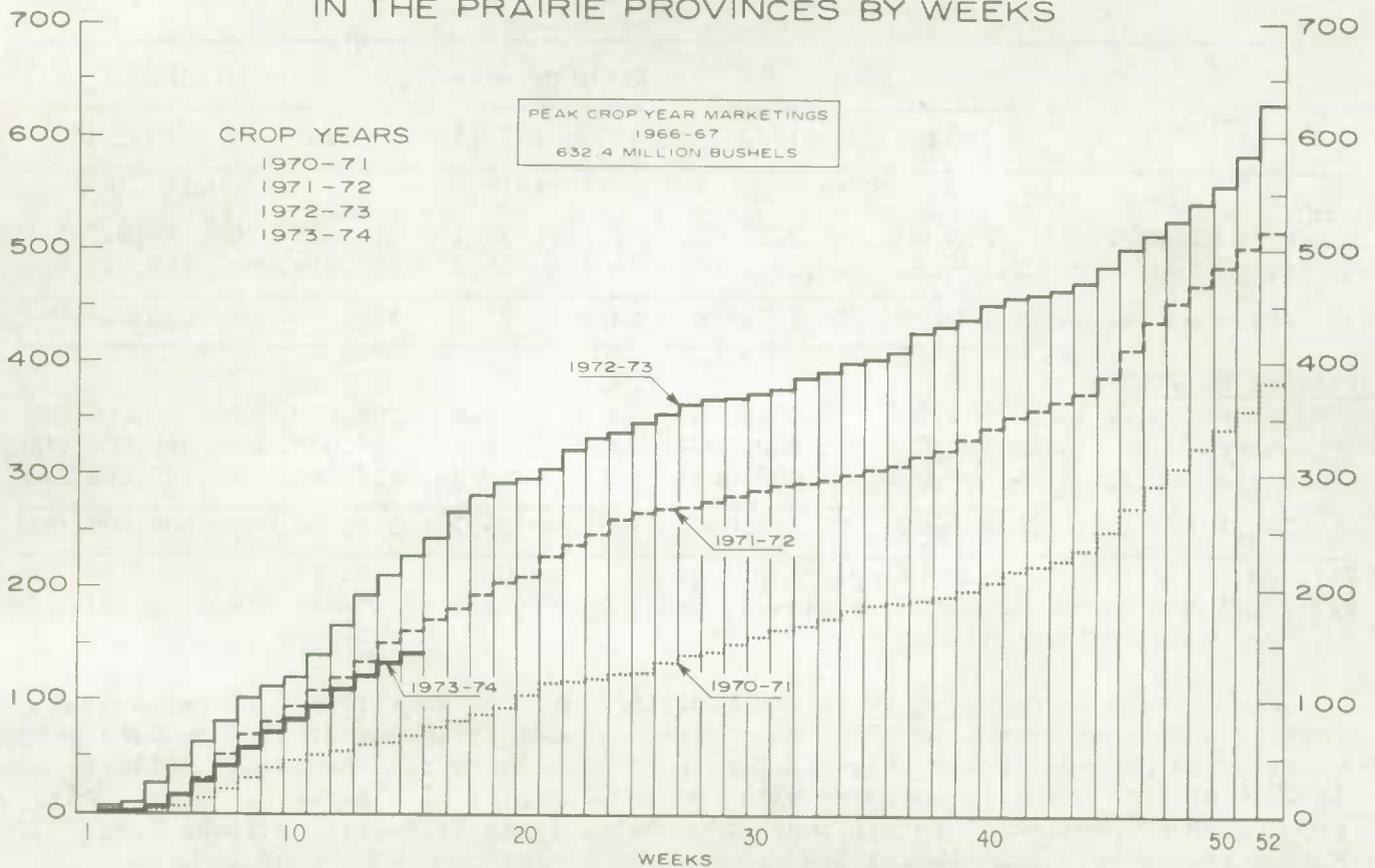
126,892,000

(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)

Canada's 1973 Wheat Crop
Estimated at 628.7
Million Bushels

Based on conditions at October 22, Canada's 1973 wheat crop now estimated at 628.7 million bushels, is 18 per cent above last year's 533.3 million bushels and 2 per cent above the ten-year average of 614.2 million bushels.

The increase in production compared with last year is due to a 2 per cent increase in yields and a 16 per cent increase in seeded acreage. The average yield at 25.4 bushels per acre is 7 per cent above the ten-year (1962-71) average of 23.8 bushels per acre. This year's all Canada crop of spring wheat, including durum, is estimated at 613.9 million bushels compared with the 1972 crop of 517.4 million and the ten-year average of 598.8 million bushels. Ontario's winter wheat crop is estimated at 14.8 million bushels, a decrease of 7 per cent from last year's crop of 15.9 million.

In the Prairie Provinces the 1973 wheat crop is now placed at 609.0 million bushels, some 96.0 million bushels or 19 per cent above the 1972 crop of 513.0 million bushels. Production in Saskatchewan accounts for 63 per cent of this year's all Canada wheat crop and is estimated at 395.0 million bushels, some 21 per cent more than last year's 326.0 million bushels. The Alberta crop, estimated at 134.0 million bushels, is up 14 per cent from last year's production of 118.0 million while the Manitoba crop of 80.0 million is 16 per cent larger than the 1972 outturn. The indicated average yield per seeded acre in the Prairie Provinces is 25.2 bushels, with Manitoba averaging 25.8, Saskatchewan, 24.4 and Alberta, 27.3 bushels per acre. Current estimates of production in the Prairie Provinces include relatively small quantities of winter wheat principally in Alberta, and an estimated 57.8 million bushels of durum wheat.

November Estimate of the 1973 Production of Spring and Winter Wheat in Canada
 Compared with 1972

Crop	Area		Yield per acre		Production	
	1972	1973	1972	1973(1)	1972	1973(1)
	acres		bushels		bushels	
<u>CANADA</u>						
Winter wheat(2) .	365,000	375,000	43.5	39.5	15,878,000	14,812,000
Spring wheat	20,984,700	24,385,700	24.7	25.2	517,410,000	613,926,000
All wheat	21,349,700	24,760,700	25.0	25.4	533,288,000	628,738,000
<u>PRAIRIE PROVINCES</u>						
Manitoba	2,600,000	3,100,000	26.5	25.8	69,000,000	80,000,000
Saskatchewan	13,900,000	16,200,000	23.5	24.4	326,000,000	395,000,000
Alberta	4,300,000	4,900,000	27.4	27.3	118,000,000	134,000,000
Totals(2)	20,800,000	24,200,000	24.7	25.2	513,000,000	609,000,000

(1) As indicated on basis of conditions on or about October 22.

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

The acreage in durum wheat in the Prairie Provinces in 1973 was 19 per cent smaller than that seeded in 1972, and average yields estimated at 22.7 bushels per acre, are 3 per cent below the 1972 figure of 23.3 bushels. The latest estimate is 57.8 million bushels, compared with the 1972 crop of 73.5 million. Estimated production by provinces, in millions of bushels, is as follows: Manitoba 2.4, Saskatchewan, 50.0 and Alberta 5.4.

November Estimate of the 1973 Production of Durum Wheat(1)
in the Prairie Provinces Compared with 1972

Province	Area		Yield per acre		Production	
	1972	1973	1972	1973(2)	1972	1973(2)
	acres		bushels			
Manitoba	160,000	100,000	25.0	24.0	4,000,000	2,400,000
Saskatchewan	2,700,000	2,200,000	23.0	22.7	62,000,000	50,000,000
Alberta	300,000	250,000	25.0	21.6	7,500,000	5,400,000
Total	3,160,000	2,550,000	23.3	22.7	73,500,000	57,800,000

(1) Acreage and production included with spring wheat.

(2) As indicated on the basis of conditions on or about October 22.

November Estimate, in Metric Tons, of the 1973 Production of Spring and
Winter Wheat in Canada, Compared with 1972

Crop	1972		1973(1)	
	bushels	metric tons	bushels	metric tons
<u>CANADA</u>				
Winter wheat	15,878,000	432,100	14,812,000	403,100
Spring wheat(2)	517,410,000	14,081,800	613,926,000	16,708,600
All wheat	533,288,000	14,513,900	628,738,000	17,111,700
<u>PRAIRIE PROVINCES</u>				
Wheat(2)	513,000,000	13,961,800	609,000,000	16,574,500
Durum wheat	73,500,000	2,000,400	57,800,000	1,573,100

(1) As indicated on basis of conditions on or about October 22.

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

Shipments Under Freight assistance shipments of wheat from the Prairie
Feed Grain Provinces to Eastern Canada and British Columbia during
Assistance Regulations August-October 1973 amounted to 8,175,000 bushels, 4
per cent above the 7,860,000 shipped during the same
three months of 1972. The bulk of the shipments during the current months under
review went to destinations in Quebec with this province accounting for 49 per cent
of the total. During August-October Quebec accounted for 57 per cent of the total.

Provincial Distribution of Wheat Shipments under the Feed Grain Assistance
Regulations August-October 1973 and 1972

Month	Western wheat							Total
	Nfld.	P.E.I.	N.S.	N.B.	Que.	Ont.	B.C.	
	thousand bushels							
August 1973	2	26	361	145	1,694	640	331	3,199
September	3	12	111	38	938	598	323	2,022
October	159	7	328	109	1,396	532	424	2,954
Total	163	45	801	292	4,027	1,770	1,078	8,175
Same months 1972	203	60	645	310	4,492	1,034	1,115	7,860

Millfeed shipments under the Feed Grain Assistance Regulations indicate ship-
ments of 94,021 tons during August-October 1973. Shipments for the three-month
total of the previous crop year amounted to 95,121 tons. The greater portion of
the millfeed shipments during the period under review went to destinations in
Quebec and Ontario.

Provincial Distribution of Millfeed Shipments under the Feed Grain Assistance
Regulations August - October 1973 and 1972

Province	August - October	
	1972	1973
	tons	
Newfoundland	—	991
Prince Edward Island	632	434
Nova Scotia	2,100	2,579
New Brunswick	1,498	1,409
Quebec	48,246	46,624
Ontario	34,299	37,046
British Columbia	8,346	4,938
Total	95,121	94,021

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>1971-72</u>					
August	48,530	2	48,533	1,983	50,516
September	44,520	336	44,856	3,086	47,942
October	59,356	34	59,389	2,105	61,494
November	52,948	7	52,956	1,899	54,855
December	32,041	109	32,149	2,709	34,859
January	21,627	73	21,700	1,352	23,052
February	23,420	45	23,466	1,431	24,987
March	22,108	179	22,287	2,297	24,584
April	33,798	46	33,273	1,840	35,684
May	39,255	17	39,273	1,916	41,188
June	45,540	43	45,583	2,724	48,307
July	54,940	73	55,013	1,373	56,386
Total	478,084	956	479,048	24,716	503,764
<u>1972-73(4)</u>					
August	40,353	3	40,357	2,661	43,018
September	64,576	37	64,613	2,237	66,850
October	68,856	13	68,869	1,701	70,571
November	65,571	3	65,574	1,713	67,288
December	33,280	111	33,391	2,081	35,472
January	26,858	3	26,861	1,197	28,058
February	28,635	52	28,687	2,272	30,959
March	33,313	61	33,374	2,099	35,473
April	31,283	11	31,294	1,525	32,819
May	51,926	43	51,969	1,849	53,817
June	50,858	26	50,884	3,107	53,991
July	57,319	57	57,376	1,473	58,850
Total	552,829	421	553,250	23,916	577,166
<u>1973-74(4)</u>					
August	45,691	38	45,728	824 ^r	46,553 ^r
September	25,754	15	25,770	1,523 ^r	27,293 ^r
October	40,344	119	40,463	1,976	42,439
Total	111,789	172	111,961	4,323	116,285

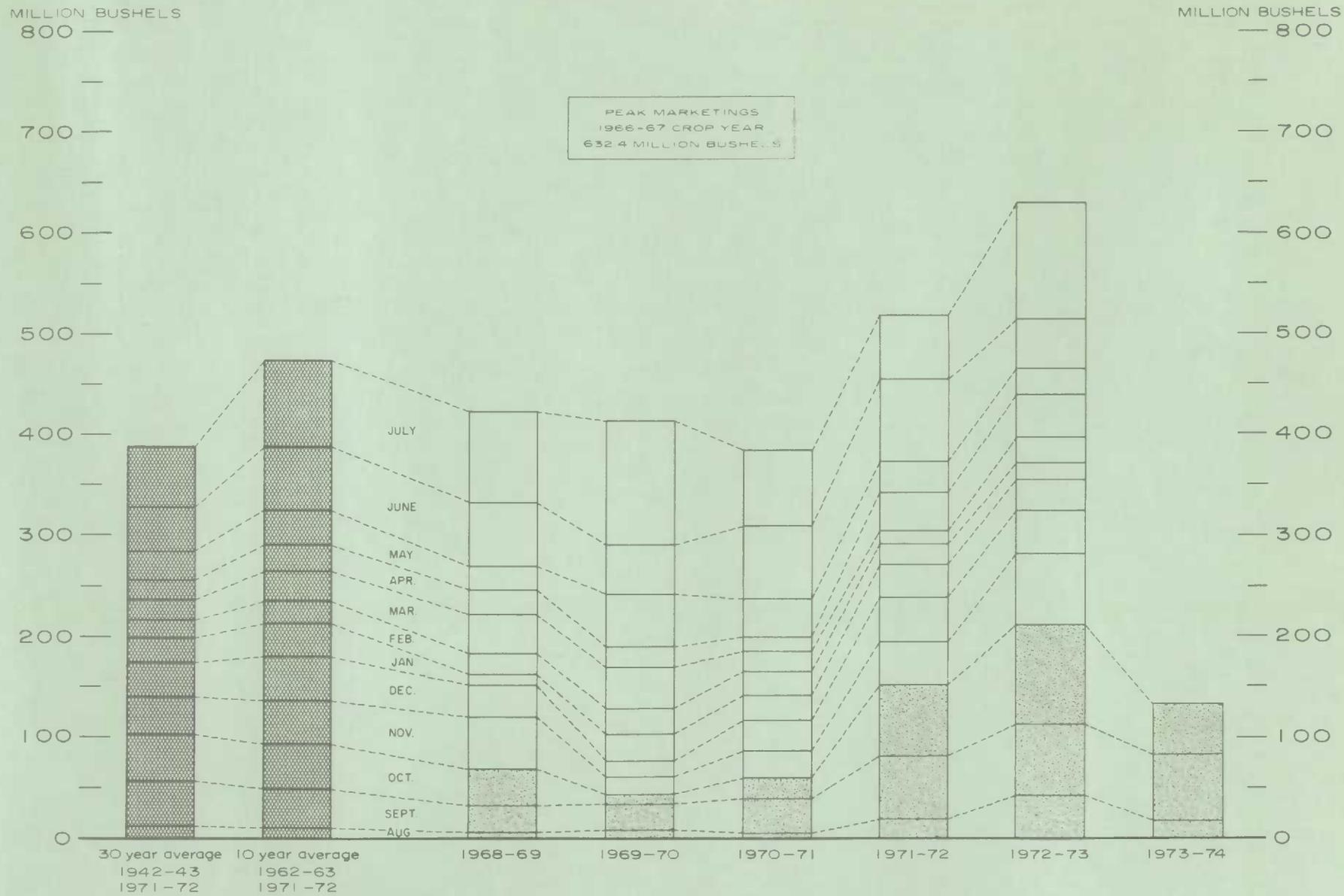
- (1) Export clearances including shipments to the United States compiled by the Economics and Statistics Division of the Canadian Grain Commission.
- (2) Compiled from Canadian Customs returns, 1971-72 adjusted to remove effect of time lag in reporting.
- (3) In terms of wheat equivalent. Wheat flour conversion rate: 2.3 bushels per cwt.
- (4) Subject to revision.

Exports of Canadian Wheat (1) by Destination

Destination	Wheat (except durum)	Durum wheat	All wheat	
			October 1973	October 1972 ^F
bushels				
<u>Western Europe</u>				
EEC:				
Belgium and Luxembourg	238,000	—	238,000	722,363
Britain	5,270,735	18,530	5,289,265	4,411,848
France	—	—	—	77,915
Germany, West	313,973	1,639,650	1,953,623	1,168,093
Ireland	—	—	—	293,367
Italy	—	—	—	1,133,038
Netherlands	76,078	—	76,078	1,347,341
Sub-total	5,898,786	1,658,180	7,556,966	9,153,965
Other Western Europe:				
Finland	—	—	—	146,982
Norway	252,672	—	252,672	—
Portugal	—	—	—	492,800
Sweden	—	—	—	7,355
Switzerland	—	173,737	173,737	446,393
Sub-total	252,672	173,737	426,409	1,093,530
Total	6,151,458	1,831,917	7,983,375	10,247,495
<u>Eastern Europe</u>				
Albania	451,733	—	451,733	—
Poland	—	—	—	849,333
U.S.S.R. (Russia)	7,776,026	—	7,776,026	19,935,257
Total	8,227,759	—	8,227,759	20,784,590
<u>Africa</u>				
Algeria	—	1,294,600	1,294,600	634,667
Ghana	—	—	—	351,755
Mauritania	19,722	—	19,722	—
Morocco	—	—	—	410,920
Nigeria	—	—	—	185,000
Tunisia	594,133	—	594,133	1,194,550
Zambia	523,040	—	523,040	—
Total	1,136,895	1,294,600	2,431,495	2,776,892

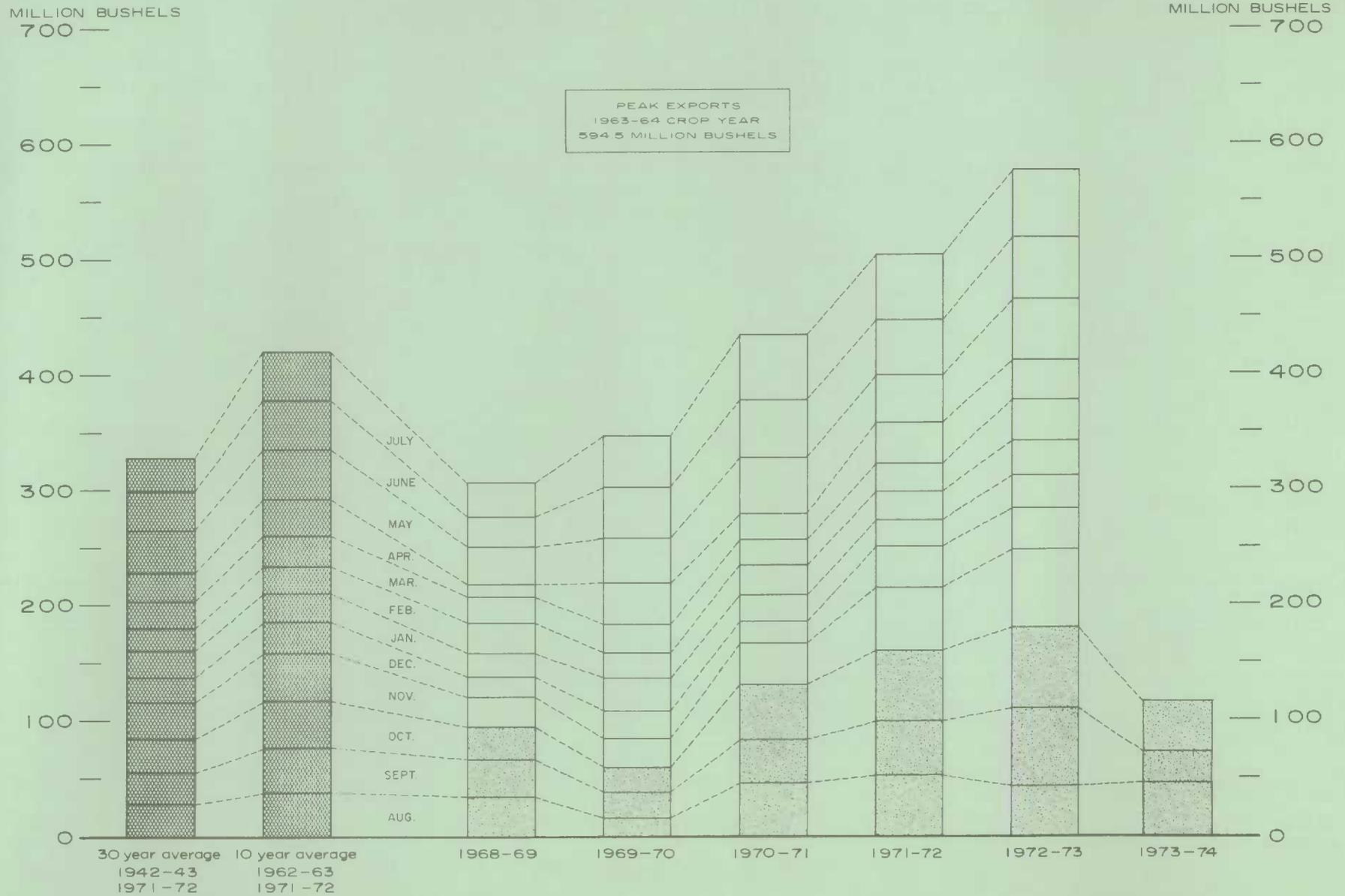
For footnotes see end of table.

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



Agriculture Division, Statistics Canada

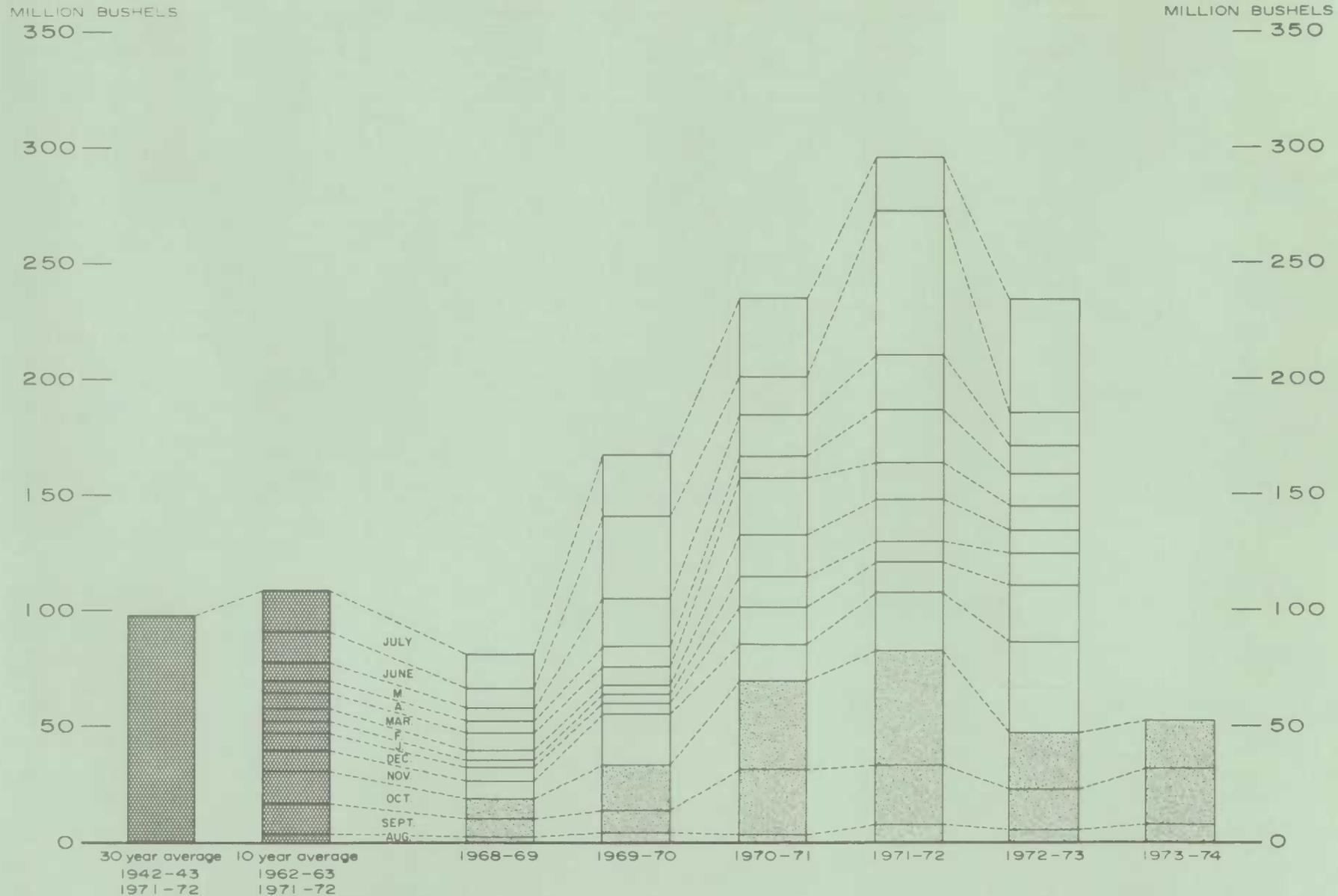
EXPORTS OF CANADIAN WHEAT* AND WHEAT FLOUR** (SPECIFIED PERIODS)



*Beginning with 1955-56 includes seed wheat.

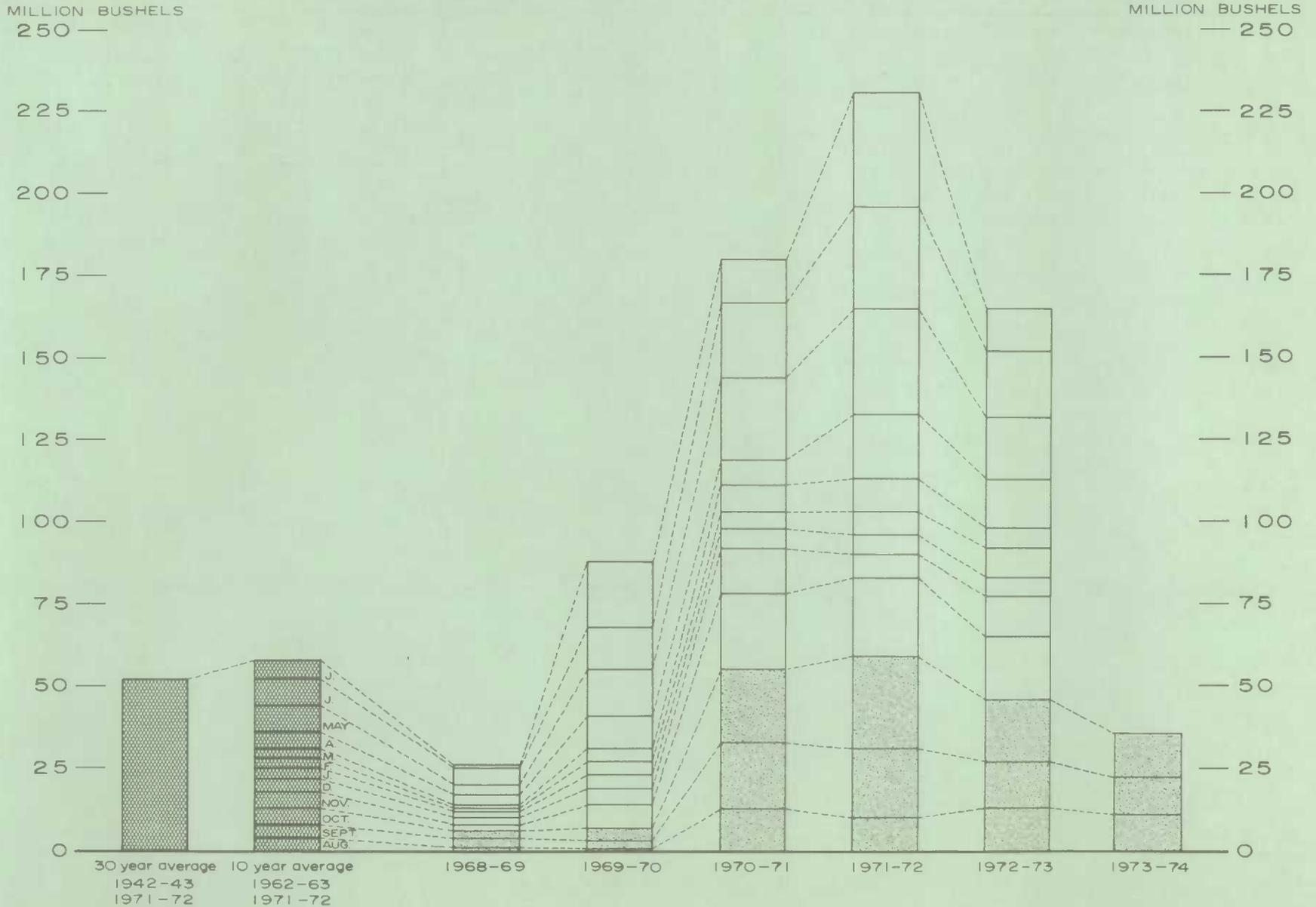
**In terms of wheat equivalent.

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



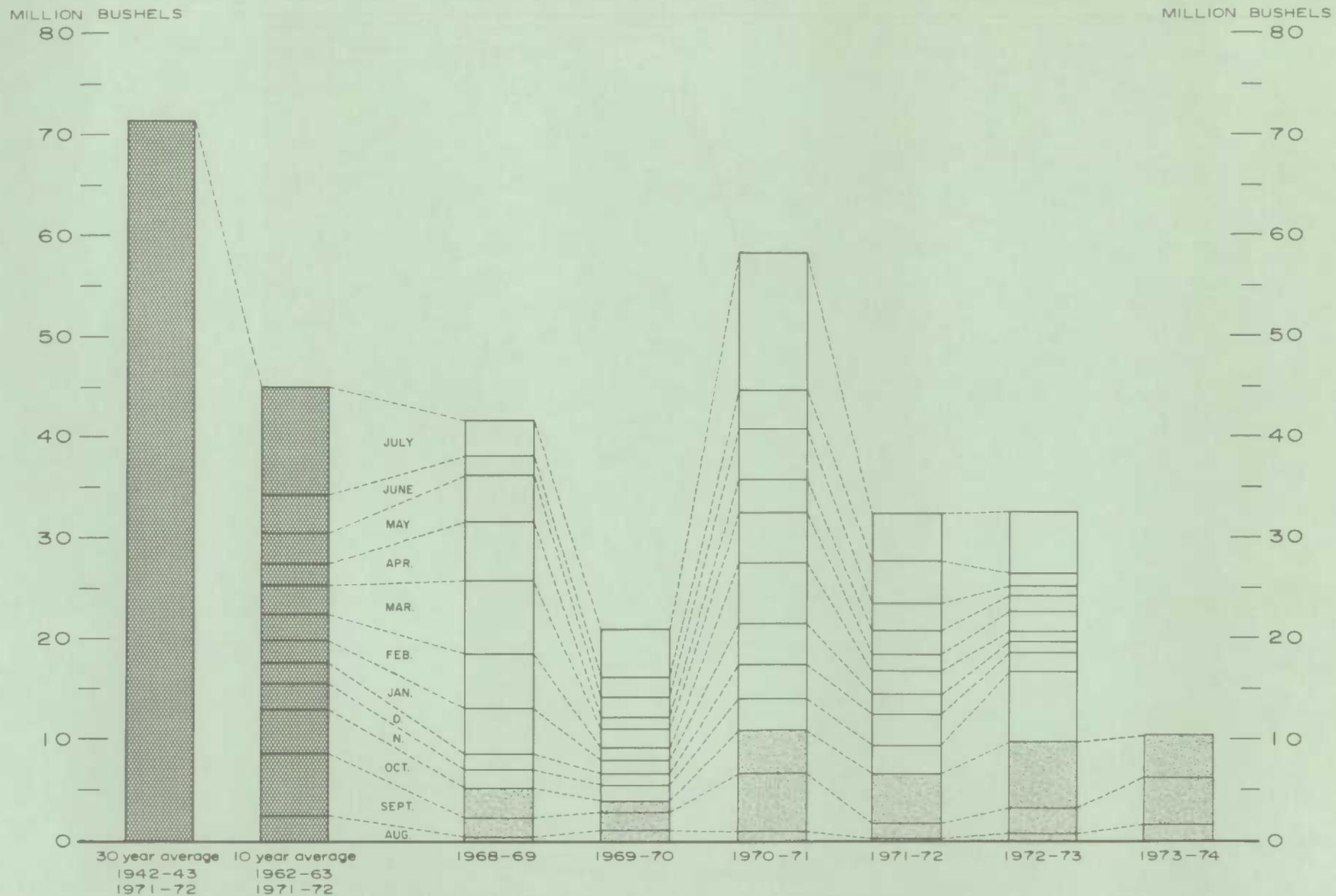
Agriculture Division, Statistics Canada

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

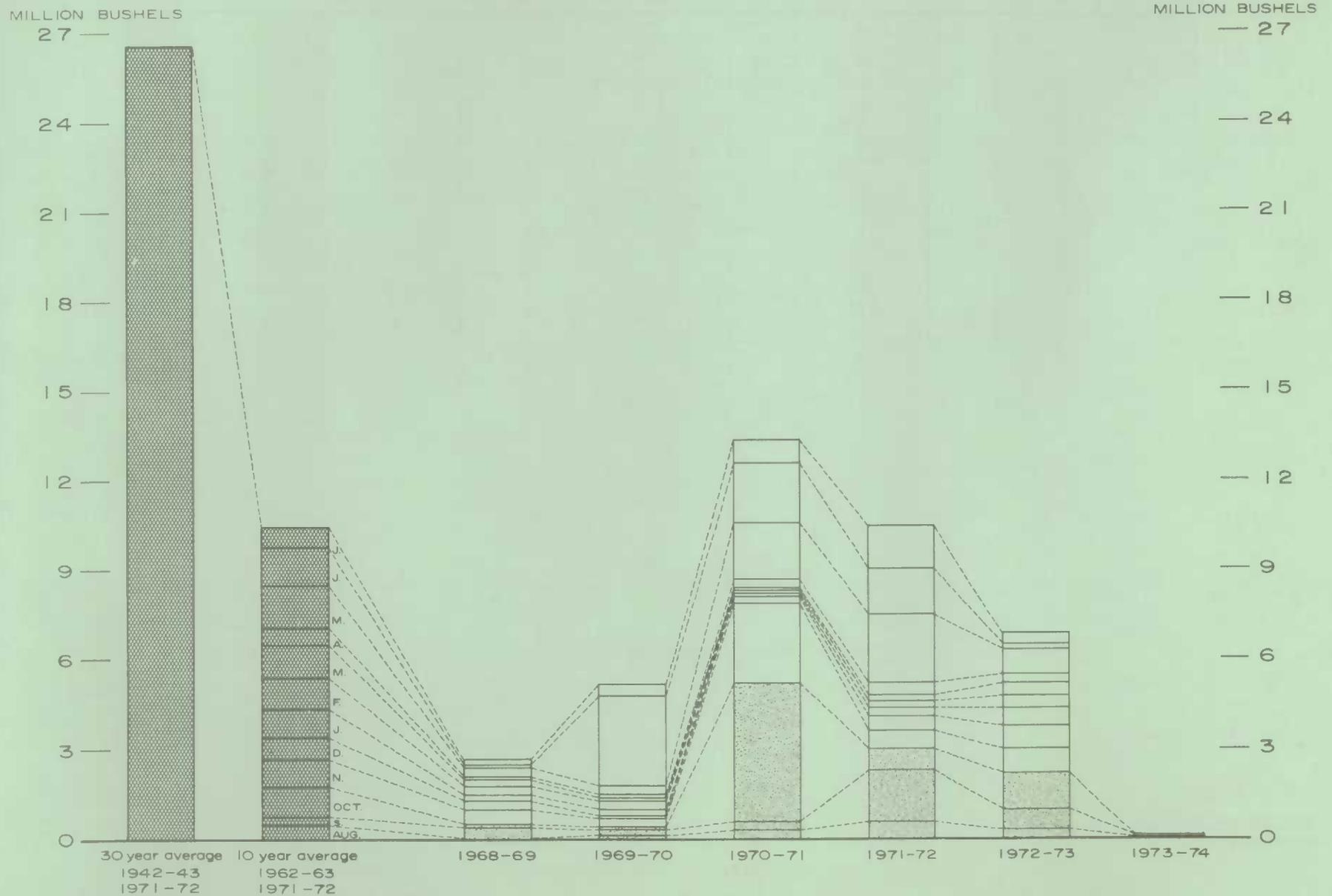


*In terms of grain equivalent.

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



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



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

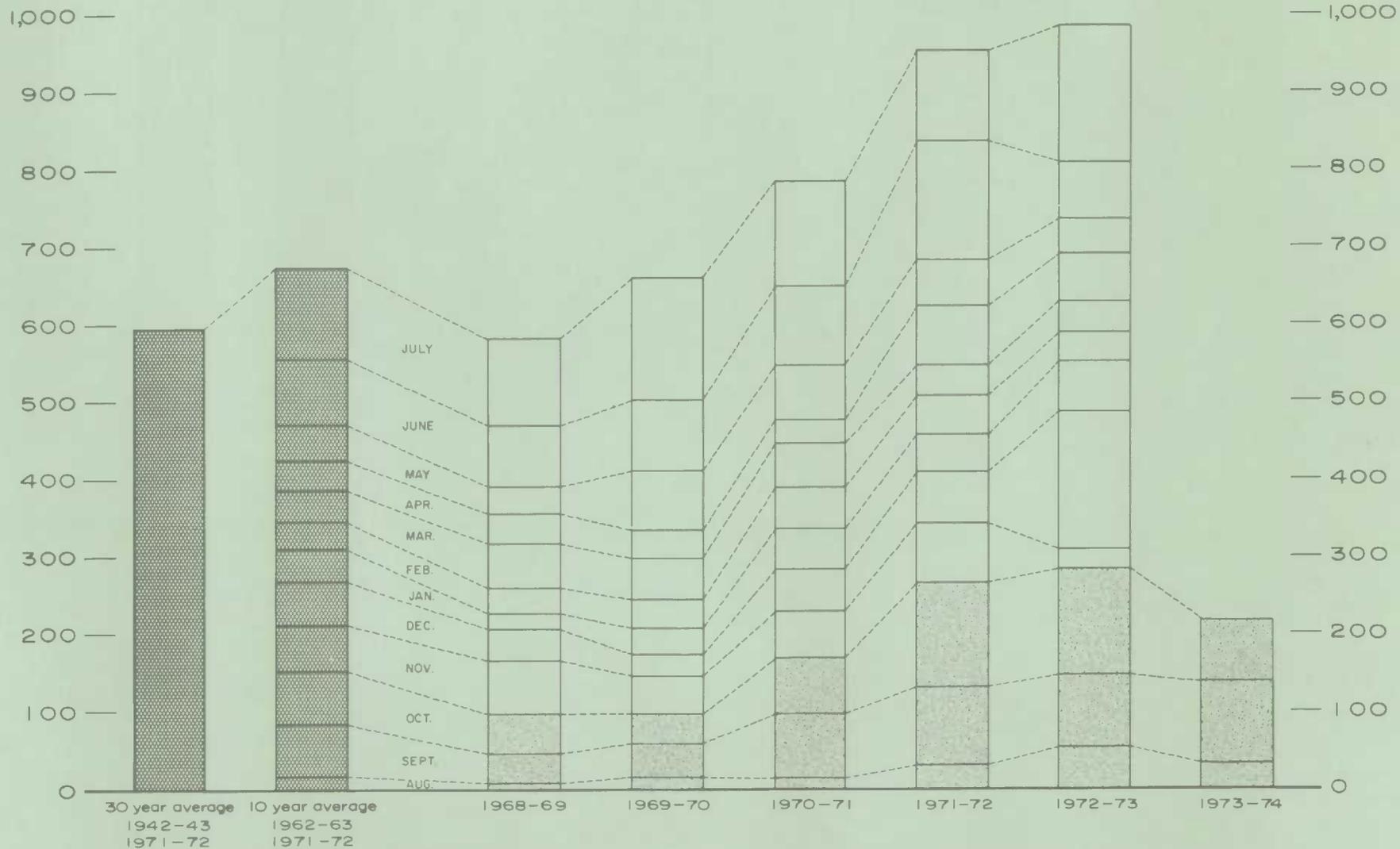
**In terms of grain equivalent.

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

(SPECIFIED PERIODS)

MILLION BUSHELS
1,100 —

MILLION BUSHELS
— 1,100



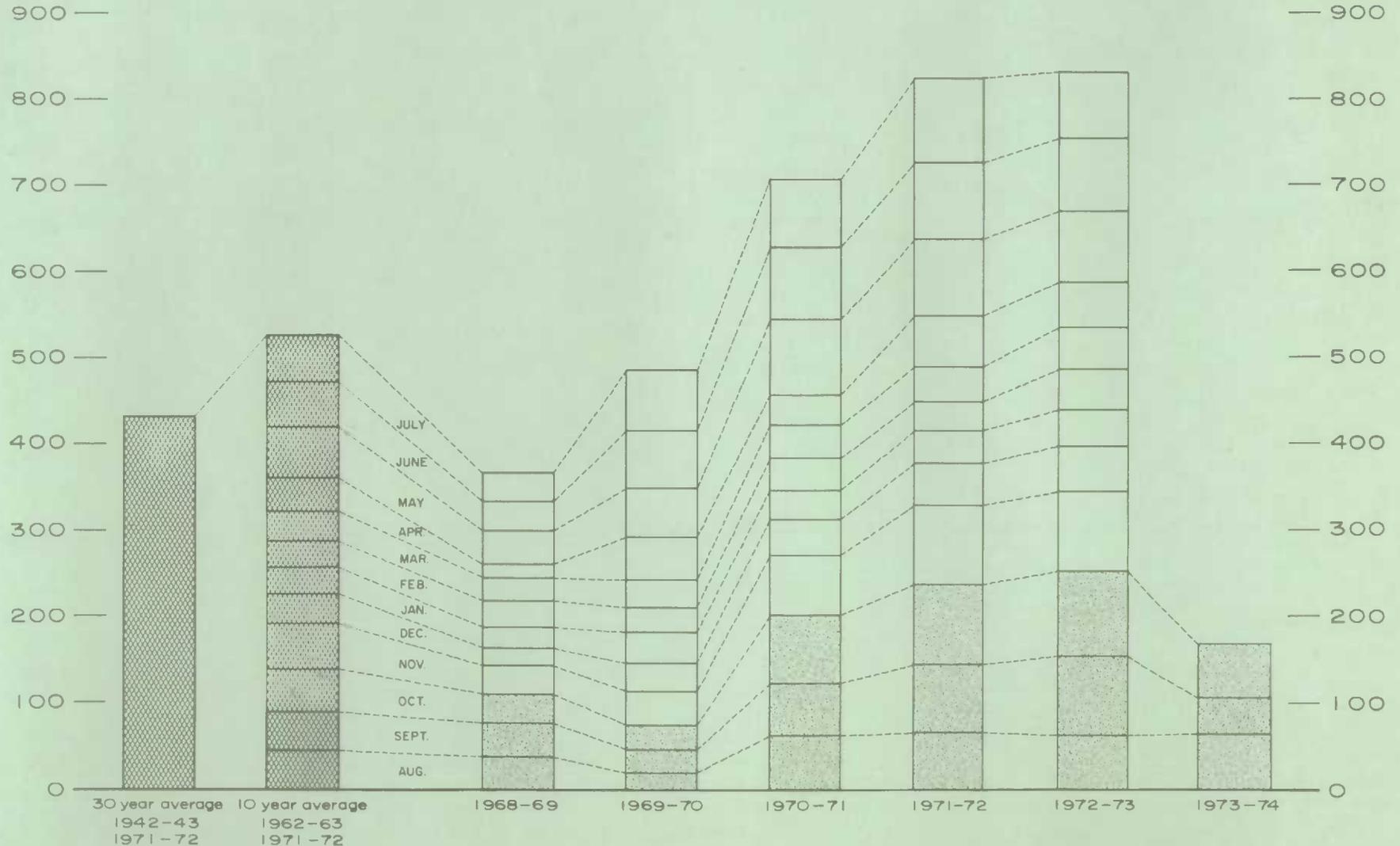
*Wheat, oats, barley, rye, flaxseed and from 1960-61 rapeseed.

EXPORTS OF CANADA'S SIX MAJOR GRAINS AND PRODUCTS*

(SPECIFIED PERIODS)

MILLION BUSHELS
1,000 —

MILLION BUSHELS
1,000 —



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

Exports of Canadian Wheat (1) by Destination — Concluded

Destination	Wheat (except durum)	Durum wheat	All wheat	
			October 1973	October 1972 ^r
			bushels	
<u>Asia</u>				
Afghanistan	—	—	—	428,200
Burma	—	—	—	367,433
India	6,073,775	—	6,073,775	—
Indonesia	441,293	—	441,293	523,600
Japan	7,420,683	—	7,420,683	3,590,732
Lebanon	567,840	581,056	1,148,896	—
Pakistan	—	—	—	1,735,771
People's Republic of China ..	3,506,307	—	3,506,307	24,950,457
Philippines	—	—	—	1,573,226
Total	18,009,898	581,056	18,590,954	33,169,419
<u>Western Hemisphere</u>				
Brazil	857,700	—	857,700	1,154,714
Cuba	916,575	67,200	983,775	496,160
Haiti	327,600	—	327,600	—
Jamaica	—	—	—	187,335
Peru	805,093	—	805,093	—
Venezuela	134,400	—	134,400	38,592
United States	2,048	—	2,048	—
Total	3,043,416	67,200	3,110,616	1,876,801
Sub-total, all countries	36,569,426	3,774,773	40,344,199	68,855,197
Seed wheat(2)			118,992	13,268
Total, all countries.	36,569,426	3,774,773	40,463,191	68,868,465

(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, 1972 adjusted for time lag.

Cumulative Exports of Canadian Wheat(1) by Destination

Destination	August -- October 1973			Total same period last year ^r
	Wheat (except durum)	Durum wheat	Total wheat	
bushels				
<u>Western Europe</u>				
EEC:				
Belgium and Luxembourg	518,000	112,000	630,000	3,112,796
Britain	13,736,741	257,613	13,994,354	11,826,826
France	—	—	—	303,517
Germany, West	364,514	3,759,500	4,124,014	3,821,424
Ireland	—	—	—	1,329,367
Italy	—	560,000	560,000	6,291,682
Netherlands	92,613	25,573	118,186	2,292,523
Sub-total	14,711,868	4,714,686	19,426,554	28,978,135
Other Western Europe:				
Austria	—	112,000	112,000	84,515
Finland	—	—	—	146,982
Malta	—	—	—	326,811
Norway	252,672	—	252,672	—
Portugal	—	—	—	492,800
Sweden	—	—	—	44,095
Switzerland	—	684,401	684,401	1,263,585
Sub-total	252,672	796,401	1,049,073	2,358,788
Total	14,964,540	5,511,087	20,475,627	31,336,923
<u>Eastern Europe</u>				
Albania	1,701,205	—	1,701,205	—
Poland	39,588	308,000	347,588	849,333
U. S. S. R. (Russia)	27,198,891 ^r	2,316,350	29,515,241 ^r	54,607,957
Total	28,939,684 ^r	2,624,350	31,564,034 ^r	55,457,290
<u>Africa</u>				
Algeria	—	3,167,601	3,167,601	2,300,073
Ghana	572,991	—	572,991	1,042,168
Dahomey	—	—	—	41,961
French Africa n.e.s.	36,743	—	36,743	—
Mauritania	216,786	—	216,786	—
Morocco	—	—	—	410,920
Nigeria	—	—	—	659,208
Tunisia	594,133	—	594,133	1,194,550
Zambia	523,040	—	523,040	—
Total	1,943,693	3,167,601	5,111,294	5,648,880

See footnotes at end of table.

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

Destination	August — October 1973			Total same period last year ^r
	Wheat (except durum)	Durum wheat	Total wheat	
	bushels			
<u>Asia</u>				
Afghanistan	—	—	—	472,292
Bangladesh	4,346,440 ^r	—	4,346,440 ^r	2,607,547
Burma	—	—	—	367,433
Hong Kong	—	—	—	184,800
India	6,073,775	—	6,073,775	—
Indonesia	1,023,244	—	1,023,244	523,600
Japan	13,169,350	—	13,169,350	9,901,201
Lebanon	567,840	1,742,496	2,310,336	1,874,504
Malaysia	—	—	—	121,333
Pakistan	1,628,146	—	1,628,146	5,639,276
People's Republic of China.	12,591,376	—	12,591,376	46,184,039
Philippines	7,431	—	7,431	1,573,226
Saudi Arabia	140,000	—	140,000	—
Singapore	—	—	—	186,667
Syria	—	—	—	846,655
Total	39,547,602^r	1,742,496	41,290,098^r	70,482,573
<u>Western Hemisphere</u>				
Barbados	34	—	34	30
Brazil	7,647,550	—	7,647,550	6,735,236
Cuba	3,210,372	174,000	3,384,372	1,990,864
Haiti	523,600	—	523,600	313,600
Jamaica	1,596	—	1,596	188,004
Peru	1,650,005	—	1,650,005	1,541,298
St. Lucia	—	—	—	167
Venezuela	134,400	—	134,400	89,600
United States(2)	6,840	—	6,840	—
Total	13,174,397	174,000	13,348,397	10,858,799
Sub-total, all countries	98,569,916	13,219,534	111,789,450	173,784,465
Seed wheat(3)			171,984	50,453
Total, all countries .	98,569,916	13,219,534	111,961,434	173,834,918

(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, 1972 adjusted for time lag.

Customs Exports of Canadian Wheat Flour by Countries of Consignment

Destination	June	September	August - September	
	1973(1)	1973(2)	1973-74(2)	1972-73(1)
bushels				
<u>Western Europe</u>				
EEC:				
Britain	20,797	17,254	121,235	271,915
Denmark	-	-	-	253
Germany, West	-	1,014	1,014	1,053
Sub-total	20,797	18,268	122,249	273,221
<u>Other Western Europe:</u>				
Gibraltar	-	-	-	3,461
Greece	-	-	-	17,077
Iceland	-	-	-	3,036
Norway	115	-	-	230
Portugal	1,840	1,702	3,542	7,245
Sub-total	1,955	1,702	3,542	31,049
Total	22,752	19,970	125,791	304,270
<u>Africa</u>				
Dahomey	9,242	15,065	15,065	2,760
Gambia, The	4,600	5,762	5,762	4,600
Guinea	-	-	-	110
Ivory Coast	6,210	-	-	690
Liberia	50,022	6,762	13,864	37,488
Malawi	2,397	1,610	4,007	1,953
Morocco	-	-	50,759	-
Mozambique	3,110	-	-	5,764
Portuguese Africa, n.e.s.	6,265	-	4,600	27,910
Sierra Leone	984	172	172	2,208
Somalia	-	-	-	82,384
Tanzania	1,380	-	-	460
Togo	17,250	18,591	18,591	21,643
U.A.R.	-	-	-	1,119,690
Zaire	-	-	-	9,810
Total	101,460	47,962	112,820	1,317,470
<u>Asia</u>				
Afghanistan	345	-	-	966
Burma	-	-	-	342,477
Cyprus	-	-	-	681
Emirates, U.U.A.	460	2,033	3,498	1,539
Hong Kong	8,740	7,935	15,525	21,130
Iran	318	720	720	278

For footnotes see end of table.

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

Destination	June	September	August — September	
	1973(1)	1973(2)	1973-74(2)	1972-73(1)
bushels				
<u>Asia — Concluded</u>				
Japan	—	—	1,794	1,438
Jordan	285	340	1,113	644
Lebanon	—	2,263	5,122	5,647
Peoples' Democratic Republic of Yemen	50,715	—	—	—
Philippines	—	—	—	4,591
Qatar	396	—	110	—
Saudi Arabia	2,208	4,476	4,476	72,662
Taiwan	—	—	—	62
Thailand	7,762	4,600	7,360	19,435
Total	71,229	22,367	39,718	471,550
<u>Oceania</u>				
British Oceania n.e.s.	—	—	—	460
Fiji	—	—	460	460
United States Oceania	—	—	1,035	—
Total	—	—	1,495	920
<u>Western Hemisphere</u>				
Bahamas	16,116	13,090	23,065	32,807
Barbados	25,484	30,686	56,957	70,808
Bermuda	8,827	6,410	20,656	27,181
British Honduras	1,546	—	—	3,908
Cuba(3)	2,129,425	1,274,913	1,797,751	2,154,852
Greenland	133	—	—	—
Guyana	3,477	6,270	8,894	1,470
Haiti	59,800	7,648	7,648	—
Honduras	366	—	—	2,185
Jamaica	9,294	2,300	8,227	13,673
Leeward and Windward Is.	94,505	64,345	87,660	168,878
Netherlands Antilles	630	1,661	7,763	573
St. Pierre and Miquelon	3,853	1,495	3,105	4,338
Surinam	—	2,300	2,461	6,104
Trinidad and Tobago	13,754	15,054	26,968	102,260
Venezuela	—	—	—	253
United States	46,046	6,900	16,560	29,955
Total	2,413,256	1,433,072	2,067,715	2,619,245
Total, all countries ...	2,608,697	1,523,371	2,347,539	4,713,455

(1) In terms of wheat equivalent. Adjusted to remove effect of time lag in the returns made by Customs. Conversion rate: 2.3 bushels per cwt.

(2) In terms of wheat equivalent. Preliminary and unadjusted for time lag. Conversion rate: 2.3 bushels per cwt.

(3) Source: Canadian National Millers Association.
n.e.s. - Not elsewhere specified.

Note: Data for October wheat flour exports not available.

Canadian Wheat Board Weekly Average Cash Wheat Prices, Crop Year 1973-74
Basis in Store Thunder Bay and Vancouver

Class and grade	Week ending			
	October 26	November 2	November 9	November 16
cents and eights per bushel				
<u>Initial payment to producers</u>				
1 C.W. Red Spring	225	225	225	225
2 C.W. Red Spring	218	218	218	218
3 C.W. Red Spring	209	209	209	209
No. 1 Canada Utility	196	196	196	196
No. 2 Canada Utility	196	196	196	196
No. 3 Canada Utility	196	196	196	196
1 Alberta Red Winter	211	211	211	211
2 Alberta Winter	206	206	206	206
3 Alberta Winter	200	200	200	200
1 C.W. Amber Durum	225	225	225	225
2 C.W. Amber Durum	221	221	221	221
3 C.W. Amber Durum	216	216	216	216
<u>Exports</u>				
<u>(Basis in store Thunder Bay)</u>				
1 C.W. Red Spring 13.5% ..	555/2	556/4	556/5	558/1
2 C.W. Red Spring 13.5% ..	551/2	552/4	552/5	554/1
3 C.W. Red Spring	545/2	546/4	546/5	548/1
No. 1 Canada Utility(1) ..	334/5	334/5	351/2	351/2
No. 2 Canada Utility(1) ..	332/5	332/5	349/2	349/2
No. 3 Canada Utility(1) ..	338/5	338/5	355/2	355/2
1 Alberta Red Winter	549/2	550/4	550/5	552/1
2 Alberta Winter	548/2	549/4	549/5	551/1
3 Alberta Winter	547/2	548/4	548/5	550/1
1 C.W. Amber Durum	893/2	894/4	894/5	896/1
2 C.W. Amber Durum	892/2	893/4	893/5	895/1
3 C.W. Amber Durum	886/2	887/4	887/5	889/1
<u>(Basis in store Vancouver)</u>				
1 C.W. Red Spring 13.5% ..	567	568/2	568/3	569/7
2 C.W. Red Spring	560	561/2	561/3	562/7
3 C.W. Red Spring	557	558/2	558/3	559/7
1 Alberta Red Winter	561	562/2	562/3	563/7
2 Alberta Winter	560	561/2	561/3	562/7
3 Alberta Winter	559	560/2	560/3	561/7

(1) Domestic sales.

CANADIAN FLOUR MILLING SITUATION

Production Wheat flour production by Canadian mills during October 1973 amounted to 3,509,000 hundredweight, indicating an increase of 3 per cent over the September 1973 output of 3,397,000 hundredweight but 3 per cent less than the October 1972 total of 3,629,000 hundredweight, and 5 per cent below the ten-year (1963-72) average production for the month of October of 3,691,000 hundredweight. Mills reporting operations during October 1973 had a total rated capacity of 165,000 hundredweight per 24-hour day and on the basis of a 26-day working period 81.7 per cent of this rated capacity was effective.

Wheat milled for flour during October 1973 amounted to 7,915,000 bushels, 3 per cent more than the 7,685,000 bushels milled during the preceding month but 4 per cent below the 8,227,000 bushels milled during October 1972. Of the wheat milled for flour during October 1973 some 6,414,000 bushels were Western Canadian red spring wheat (other than Durum) while the remainder consisted of Ontario winter wheat (599,000 bushels); Durum (340,000 bushels); and all other (562,000 bushels).

Exports According to preliminary Customs returns, exports of Canadian wheat flour during September 1973 amounted to the equivalent of 1,523,000 bushels (some 662,000 hundredweight of flour) 85 per cent greater than the August 1973 exports of 824,000 bushels but 24 per cent lower than the adjusted September 1972 exports of 2,010,000 bushels. Flour shipments during September 1973 went to twenty-nine countries with exports to Cuba amounting to 1,275,000 bushels or 84 per cent of the September total. Other leading markets for Canadian wheat flour in terms of wheat during the month with shipments in thousands of bushels were as follows: Leeward and Windward Islands, 64; Barbados, 31; Togo, 19; Britain, 17; Dahomey, 15; Trinidad and Tobago, 15; and Bahamas, 13.

NOTE: Data re exports of wheat flour for October 1973 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 - 1969-70 "	89,677,143	39,705,457	12,717,568
1970-71	87,467,328	38,534,863	10,802,813
1971-72	88,123,761	39,071,806	10,745,908
1972-73(2)	86,390,113	38,049,127	10,398,267
1973-74(2)			
August	8,162,253	3,614,900	358,334 ^F
September	7,685,039	3,397,175	662,335 ^F
October	7,914,688	3,508,583	859,098
Total	23,761,980	10,520,658	1,879,767
Same months 1972-73 ^F	23,338,623	10,253,908	2,720,590

(1) Based on Customs returns. Exports for the crop year 1945-46 - 1971-72 revised to remove effect of time lag in the returns made by Customs. (2) Subject to revision.

UNITED STATES SITUATION

Supplies Lower than 1972-73 Total domestic supplies of wheat in the United States for the 1973-74 crop year are currently placed at 2,156.4 million bushels, 10 per cent less than the previous year's total of 2,407.8 million reflecting an increase in production which more than offset a decrease in carryover stocks. The current crop, estimated at 1,726.8 million bushels, represents an increase of 12 per cent over last year's outturn of 1,544.8 million, while the 429.6 million bushels carried over to July 1, 1973 were 50 per cent below the 1972 stocks of 863.1 million. Domestic disappearance during 1973-74 is estimated at about 755.0 million bushels, 4 per cent less than the 789.9 million last year. After deducting anticipated domestic requirements for the current United States crop year, some 1,401.4 million remain available for export and for carryover, 13 per cent lower than the 1,618.0 million in 1972-73.

Exports Continue at High Level Exports of wheat and wheat flour in terms of grain equivalent during the period July-October 1973 amounted to 530.7 million bushels, 76 per cent larger than the 301.3 million exported during the same months last year. The balance remaining November 1, 1973 for export and for carryover was estimated at 870.7 million bushels compared with 1,316.8 million on approximately the same date a year ago.

United States Wheat Supplies

Item	1972-73 ^r	1973-74 ^p
	million bushels	
Carryover at beginning of crop year (July 1)	863.1	429.6 ^r
Production	1,544.8	1,726.8
Total estimated domestic supplies	2,407.8	2,156.4
Imports of wheat and wheat flour in terms of wheat for domestic use, July-October	0.1	0.1
Total estimated supplies(1)	2,407.9	2,156.4
Less estimated domestic requirements for crop year(2)	789.9	755.0 ^r
Available for export and for carryover	1,618.0	1,401.4
<u>Deduct</u>		
Exports of wheat as grain, July-October	284.0	512.0
Exports of wheat flour and products(3) in terms of wheat, July-October	17.2	18.7
Total exports of wheat and wheat flour	301.3	530.7
Balance on November 1 for export and for carryover	1,316.8	870.7

(1) Excluding imports for November-June.

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

(3) Includes bulgar, rolled wheat and macaroni.

Stocks of Wheat
in All Positions
October 1, 1973

On October 24, 1973 the United States Department of Agriculture stated in a release that stocks of all wheat were down 21 per cent from a year earlier, while durum stocks were down 14 per cent. Rye stocks were down 42 per cent and the flaxseed level was 36 per cent below last year.

All wheat in storage on October 1 totalled 1,475 million bushels, 21 per cent less than a year earlier. Farm holdings, at 636 million, were down 12 per cent from a year earlier, and off-farm stocks of 839 million bushels were down 26 per cent from October 1, 1972. Disappearance from all storage positions during July-September was indicated at 681 million bushels, compared with 542 million bushels a year ago. Larger exports accounted for the increased disappearance.

Durum wheat stocks in all positions totalled 98.0 million bushels, 14 per cent less than a year earlier and 26 per cent below October 1, 1971. Both farm holdings of 77.0 million and off-farm stocks of 21.0 million were down 14 per cent from last year. Disappearance during July-September 1973 amounted to 22.7 million bushels, compared with 28.1 million a year earlier.

Stocks of United States Wheat by Position, October 1, 1973 with Comparisons

Grain and position	Oct. 1, 1971	Oct. 1, 1972	July 1, 1973	Oct. 1, 1973
	thousand bushels			
<u>All wheat</u>				
On farms(1)	826,402	724,874	124,989	636,202
Commodity Credit Corp.(2)	1,886	1,858	1,819	1,817
Mills, elev. & whses.(1,3)	1,045,046	1,138,841	302,759	837,200
Total	1,873,334	1,865,573	429,567	1,475,219
<u>Durum wheat(4)</u>				
On farms(1)	105,737	89,773	18,737	77,001
Commodity Credit Corp.(2)	581	594	401	401
Mills, elev. & whses.(1,3)	26,489	23,864	16,490	20,617
Total	132,807	114,231	35,628	98,019

- (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.

U.S. Wheat and Flour Exports Set Record in Fiscal 1973

According to the August 1973 issue of the World Agricultural Production and Trade, Foreign Agricultural Service, United States Department of Agriculture, wheat shipments of 1,126 million bushels were 95.6 per cent greater than during fiscal 1972. The principal factors behind the large increase were huge shipments of 348 million bushels to the Soviet Union (none for 1971-72); 43 million bushels to East European countries (1 mil. in 1971-72); 22 million bushels to the People's Republic of China (none in 1971-72); and 124 million bushels to Japan, compared to 81 million during 1971-72. Also, the relative freedom of the various shipping ports from strikes made it more accessible to move these large quantities. Shipments expanded to many other countries, particularly the EC-6 in Western Europe, Bangladesh, Indonesia, and Taiwan in Asia; and Mexico, Brazil, and Peru in the Western Hemisphere. The only area to receive less shipments was Africa, led by Morocco and Algeria. Other major decreases occurred in shipments to Colombia, the United Kingdom, India, Iran, and the Republic of Korea.

Flour exports at 40 million bushels continued to decline by 12 per cent.

United States Exports of Wheat and Flour(1) by Country of Destination July-June 1971-72 and 1972-73

Destination	July-June 1971-72			July-June 1972-73		
	Wheat	Flour(2)	Total	Wheat	Flour(2)	Total
thousand bushels						
<u>Western Hemisphere</u>						
Canada	(3)	20	20	(3)	21	21
Mexico	14,763	23	14,786	24,581	7	24,588
Costa Rica	1,933	33	1,966	2,656	64	2,720
El Salvador	1,673	66	1,739	2,262	49	2,311
Guatemala	2,424	103	2,527	2,270	175	2,445
Other Central America	5,205	335	5,540	4,824	688	5,512
Dominican Republic	3,249	125	3,374	2,601	152	2,753
Haiti	-	43	43	74	87	161
Jamaica	867	947	1,814	1,683	1,297	2,980
Trinidad and Tobago	2,261	5	2,266	2,789	89	2,878
Other Bermuda and Caribbean .	815	494	1,309	540	300	840
Bolivia	2,156	1,462	3,618	752	57	809
Brazil	16,426	568	16,994	43,973	812	44,785
Chile	-	247	247	334	296	630
Colombia	15,574	554	16,128	10,215	782	10,997
Ecuador	3,974	143	4,117	4,534	210	4,744
Guyana	1,385	31	1,416	1,736	14	1,750
Peru	16,510	328	16,838	20,524	172	20,696
Surinam	518	174	692	352	104	456
Uruguay	301	6	207	4,365	4	4,369
Venezuela	23,746	37	23,783	23,569	46	23,615
Other South America	1,029	38	1,067	1	40	41
Total	114,809	5,782	120,591	154,635	5,466	160,101

For footnotes see end of table.

United States Exports of Wheat and Flour(1) by Country of Destination
July-June 1971-72 and 1972-73 - Continued

Destination	July-June 1971-72			July-June 1972-73		
	Wheat	Flour(2)	Total	Wheat	Flour(2)	Total
thousand bushels						
<u>Western Europe</u>						
EEC:						
Belgium-Luxembourg	6,537	(4)	6,537	6,221	—	6,221
France	2,497	—	2,497	7,218	—	7,218
Germany, West	5,951	2	5,953	22,986	—	22,986
Italy	3,096	—	3,096	8,701	—	8,701
Netherlands	21,157	402	21,559	35,350	282	35,632
Total	39,238	404	39,642	80,476	282	80,758
Other Western Europe:						
Iceland	7	214	221	8	315	323
Norway	3,176	2	3,178	3,414	3	3,417
Portugal	6,301	23	6,324	3,794	16	3,810
Spain	4	—	4	2	—	2
Switzerland	4,887	—	4,887	5,539	—	5,539
United Kingdom	25,493	17	25,510	19,908	7	19,915
Others	326	85	411	5,454	52	5,506
Total	40,194	341	40,535	38,119	393	38,512
<u>Eastern Europe</u>						
Poland	—	—	—	22,407	—	22,407
Romania	—	—	—	1,051	—	1,051
Yugoslavia	1,235	—	1,235	12,566	2	12,568
Others	104	—	104	6,565	—	6,565
Total	1,339	—	1,339	42,589	2	42,591
Total Europe	80,771	745	81,516	161,184	677	161,861
<u>U.S.S.R.</u>	—	—	—	347,895	—	347,895
<u>Asia</u>						
Bangladesh(5)	11,175	—	11,175	27,362	—	27,362
China, Peoples Republic of ..	—	—	—	21,731	—	21,731
China, Republic of (Taiwan) .	11,506	—	11,506	18,295	—	18,295
Cyprus	1,101	61	1,162	1,436	84	1,520
Hong Kong	1,152	27	1,179	1,923	21	1,944
India	27,814	117	27,931	18,046	335	18,381
Indonesia	4,460	2,224	6,684	17,457	726	18,183
Iran	21,607	4	21,611	18,482	2	18,484
Israel	13,088	3,094	16,182	12,955	2,356	15,311
Japan	80,646	3	80,649	124,086	7	124,093
Jordan	1,545	2,162	3,707	3	3,373	3,376
Khmer Republic	—	767	767	533	618	1,151

For footnotes see end of table.

United States Exports of Wheat and Flour(1) by Country of Destination
July-June 1971-72 and 1972-73 - Concluded

Destination	July-June 1971-72			July-June 1972-73		
	Wheat	Flour(2)	Total	Wheat	Flour(2)	Total
thousand bushels						
<u>Asia - Concluded</u>						
Korea, Republic of	62,726	1,742	64,468	55,477	4,071	59,548
Lebanon	4,331	1,282	5,613	2,638	480	3,118
Nansei and Nanpo Islands	608	149	757	-	-	-
Pakistan(5)	32,915	(4)	32,915	36,054	80	36,134
Philippines	14,767	694	15,461	15,632	1,091	16,723
Saudi Arabia	-	5,086	5,086	673	4,792	5,465
Sri Lanka	-	11,199	11,199	-	7,387	7,387
Syrian Arab Republic	8,527	-	8,527	-	-	-
Turkey	2,876	807	3,683	-	1,128	1,128
Vietnam, South	7,375	2,714	10,089	7,506	1,613	9,119
Others	8,192	278	8,470	3,652	359	4,011
Total	316,411	32,410	348,821	383,941	28,523	412,464
<u>Africa</u>						
Algeria	17,297	-	17,297	14,975	-	14,975
Ghana	1,513	12	1,525	1,545	42	1,587
Guinea	-	916	916	-	655	655
Morocco	16,578	2,581	19,159	9,395	2,915	12,310
Nigeria	12,740	438	13,178	12,528	7	12,535
Sierra Leone	1,008	3	1,011	1,067	2	1,069
Tunisia	6,645	582	7,227	1,872	763	2,635
Zaire	2	1,300	1,302	515	160	675
Others	7,961	647	8,608	16,226	658	16,884
Total	63,744	6,479	70,223	58,123	5,202	63,325
<u>Oceania</u>	-	77	77	-	161	161
Unidentified Canadian Trans- shipments	-	-	-	20,463	-	20,463
World total	575,735	45,493	621,228	1,126,241	40,029	1,166,270
Other products	9,679	-	9,679	14,676	-	14,676
Grand total	585,414	45,493	630,907	1,140,917	40,029	1,180,946

(1) Data includes shipments for relief.

(2) Grain equivalent.

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

(4) Less than 20,000 bushels.

(5) Exports to Bangladesh are included with Pakistan through April.

Winter Wheat Seeding
Nears Completion

A report released on November 9, 1973 by the Crop Reporting Board of the United States Department of Agriculture stated that seeding of winter wheat for 1974 harvest was nearing completion in most major growing areas by November 1. Dry, sunny weather in the Great Plains after mid-October allowed good seeding progress after rain had slowed progress during September and early October.

Kansas growers had 90 per cent of their intended acreage seeded by November 1, 2 to 3 weeks later than normal. Most of the remaining unplanted fields were in east Kansas. Activity picked up the last half of October when fields dried enough to resume seeding. Good stands were reported in most early seeded fields in west Kansas. Seeding neared completion in Oklahoma and Texas by late October. Armyworm damage is widespread in Texas and infestations are persisting later than usual into the fall. Colorado seedings were nearing completion by mid-October and the crop was in excellent condition. Nebraska and South Dakota wheat was in mostly good to excellent condition. Considerable acreage was seeded in late October in southeastern Nebraska, where planting had been delayed by unfavourable weather.

In Montana, seeding was nearly complete by the third week of October. Dryness persisted over much of western third of the State putting stress on new seedings. Rains in north Idaho during the month improved topsoil moisture supplies for fall grains but subsoil moisture remained short. Seeding in Washington, aided by showers during mid-October, was almost over by November 1. Reseeding of some early fields was necessary due to crusting. Oregon's early seedings benefitted from October precipitation. In the eastern Corn Belt, seeding was nearly complete in late October. Missouri wheat acreage was only about two-thirds seeded by November 1, somewhat behind last year's slow pace. The last 2 weeks of October favoured seeding throughout the area. Emerged fields were in mostly good to excellent condition.

Seeding was still in progress in late October in most South Atlantic and South Central States. Rain late in the month was very beneficial and relieved earlier dryness which had caused some growers to delay seeding.

Summary of the
Wheat Situation

On November 12, 1973 the United States Department of Agriculture stated that wheat use in 1973-74 is expected to again exceed U.S. production, resulting in a further sharp stocks reduction next summer.

The 1973 crop is estimated at a record 1,727 million bushels, 7 per cent above the old record set in 1971 and 12 per cent above 1972. However, because of reduced old-crop stocks, total supply is down a tenth from last season. Also there are prospects for another year of near-record demand. Exports continue strong and current indications point to a 1973-74 total near last year's record 1,184 million bushels. Shipments to the Soviet Union have tailed off, but the People's Republic of China, India, North Africa, and West Asia are taking up the slack. Although domestic use will be down a little this season, total disappearance will again exceed the harvest, dropping stocks by the summer of 1974 to around 250 million bushels, the least since 1948.

Recent wheat prices reached record highs, reacting to heavy early season exports, vigorous mill demand, and continued transportation bottlenecks which have reduced the availability of market supplies. Farm prices eased to \$4.22 per bushel in October after reaching \$4.62 in September. For the remainder of the marketing year, prices are likely to ease further if a record world harvest of grains is forthcoming and prospects are favourable for the 1974 crop.

The record 1973 world wheat harvest reflects larger acreages and generally favourable growing conditions, with most of the gain coming in the major exporting countries and the USSR. USSR imports are expected to be down sharply from the 15 million metric tons in 1972-73 but that decline will be nearly offset by increasing requirements elsewhere. World import demand in 1973-74 may be down only modestly from last year's record 73.5 million metric tons. The increased supply without increased trade points to some easing in world wheat prices.

Hard Red Winter (HRW): Despite a record crop, smaller stocks reduced 1973-74 supplies. Total use is expected to soar to over a billion bushels, with record exports again leading the way. As a consequence, stocks by the summer of 1974 will plummet to around 100 million bushels, smallest in 22 years.

Soft Red Winter (SRW): A sharply smaller crop resulted in a 30 per cent reduction in supplies. The smaller supply has prompted a sharp cutback in exports and increased use of other wheat classes in pastry and cake flours.

Hard Red Spring (HRS): The harvest of a large, high-quality 1973 crop puts HRS in the best supply position of any wheat. This abundance has encouraged substitution of HRS for HRW in some flour blends and led some importing countries to switch to HRS from scarcer wheats.

Durum Wheat: Smaller supplies this year are being buffeted by a strong world import demand and increasing consumption of durum-based foods at home. The apparent early season tightness of supplies skyrocketed durum prices. During July to August, prices at the major markets tripled then receded to \$5-6 per bushel in recent weeks.

White Wheat: A weather-plagued crop and sharply reduced stocks dropped total supplies to the lowest level since the early 1960's. Disappearance is also expected to contract, but stocks by the summer of 1974 could shrink further.

The outlook for 1974-75 points to some buildup in stocks for the first time since 1971-72. Wheat acreage for the 1974 crop could possibly increase 10 per cent to 15 per cent from this year's level, yielding a record crop of around 1.9 billion bushels. Demand, spearheaded by exports, is expected to continue strong in 1974-75, but will likely tail off from current levels, falling below the projected crop. The first official estimate of winter wheat seedings will be released December 21. Planting intentions for spring wheat will be released in January.

Flour production According to the Bureau of the Census, United States Department of Commerce, wheat flour production in the United States in September 1973 amounted to 21,589,000 hundredweight, averaging 1,079,000 hundredweight per working day. This compared with an average output per working day of 951,000 hundredweight last month and 1,067,000 hundredweight in September 1972. Wheat flour mills during September 1973 operated at 93.6 per cent of capacity, compared with 94.9 per cent and 105.4 per cent, respectively, for the previous month and the same month a year ago. Flour mills in September 1973 ground 48,111,000 bushels of wheat compared with 48,889,000 bushels the previous month and 47,634,000 bushels in September 1972.

AUSTRALIAN SITUATION

Supplies Lower
than Previous Year

Total estimated supplies of wheat in Australia for the 1972-73 (December-November) crop year are placed at 284.5 million bushels, 34 per cent less than the 433.4 million in 1971-72, reflecting the effect of a decrease in both carryover stocks, and production. Carryover stocks at December 1, 1972, at 50.1 million bushels were sharply below the 127.2 million at the same date a year ago, while the 1972 production, at 234.4 million registered a decline of 23 per cent from the comparable 1971 figure of 306.2 million. After deducting some 115.3 million bushels for anticipated domestic requirements, an estimated 169.2 million are available for export and for carryover during 1972-73, about half the 335.2 million in 1971-72.

Exports Less
than Year Ago

Combined exports of wheat as grain and wheat flour in terms of grain equivalent during the period December - October of the current Australian crop year amounted to 144.1 million bushels, 45 per cent below the 263.2 million exported during the corresponding period of the 1971-72 crop year. The balance remaining on November 1, 1973 for export and for carryover, at 25.1 million bushels, was in sharp contrast to the 72.0 million at the same date a year ago.

Australian Wheat Supplies

Item	1971-72 ^r	1972-73 ^p
	million bushels	
Carryover, including flour as wheat, at beginning of crop year (December 1)	127.2	50.1
Production	306.2	234.4
Total estimated domestic supplies	433.4	284.5
Less estimated domestic requirements for crop year	98.2	115.3
Available for export and for carryover	335.2	169.2
<u>Deduct</u>		
Exports of wheat as grain, December - October	252.4	134.7
Exports of wheat flour in terms of wheat, December - October	10.8	9.4
Total exports of wheat and wheat flour	263.2	144.1
Balance on November 1 for export and for carryover	72.0	25.1

The following information relative to the Australian situation has been extracted from a report from Mr. C.V. Hiltz, Third Secretary (Agriculture) for Canada, Canberra, under date of November 12, 1973 and is reproduced with the permission of the Trade Commissioner Service, Department of Industry, Trade and Commerce.

1973-74 wheat prospects. — Over the past month, the outlook for the 1973-74 wheat harvest has deteriorated. The two main causes of the deterioration are rust and rain. Up until mid-October it looked like the coming harvest would yield about 483 million bushels, Australia's second largest crop ever produced. However, a two week period of warm humid weather with heavy rain caused widespread outbreaks of rust in New South Wales and South Australia and to a lesser extent in Victoria.

In New South Wales the rust outbreak has affected over one million acres of wheat. The outbreak is most severe in the central west, south and south-west and parts of the north-west. Estimates indicate that total yield could be reduced by as much as 30 per cent, although this may be a bit too pessimistic.

In South Australia an estimated yield reduction of 20 per cent will result from the rust infection. A month ago it looked as if this State would produce one of its largest crops ever, but the rust situation will preclude this.

To a lesser extent, Victoria is also affected by the rust outbreak. No official estimate of the loss in yield due to the rust has been made, but will probably amount to between 5 and 10 per cent. The outbreak is patchy but widespread so that the potential exists for larger losses if weather conditions turn humid.

On the basis of the foregoing, the total harvest from these three States could be down by as much as 79 million bushels from the earlier estimated total harvest from these three States of 342 million bushels.

In Queensland the crop has developed as favourably as possible considering the earlier start to the season. Crops tend to be variable but moderate overall yields can be expected. Presently a total harvest of around 21 million bushels is expected. Rust has not appeared in the State to any large extent and probably will not develop into a problem. Harvesting is well underway with fluctuating yields being reported.

At the opposite end of the picture, Western Australia will harvest its largest crop ever barring any unforeseen circumstances arising. The highest estimate of total yield has come from Co-operative Bulk Handling - 130 million bushels. As their figure refers to anticipated wheat deliveries, the actual production should be higher.

In 1968-69 when Western Australia had a record harvest of 112 million bushels growers delivered 105 million bushels thus retaining 7 million bushels. If about the same amount is retained by growers this year then total production based on the Co-operative's estimate should be at least 137 million bushels.

Likewise, the State Department of Agriculture has said that an average yield of 18 bushels per acre appeared possible. Based on the estimated 7.5 million acres, this would give a total harvest of 135 million bushels.

Taking all of the foregoing into consideration the final result of the harvest could end up looking like the following:

<u>State</u>	<u>Production</u> million bushels
Queensland	21
New South Wales	130 - 148
Victoria	69 - 73
South Australia	64
Western Australia ...	135 - 137
Total	<u>419 - 443</u>

To add to the problems in New South Wales, heavy rains over the prime hard wheat areas also caused damage, thus reducing the expected intake of prime hard quality wheat. No estimate of the total quantity involved has been released, but prior to the rain it was felt that in excess of 30 million bushels of prime hard quality would be harvested. Protein tests on the small quantity harvested to date indicate a high protein crop as tests of 16 per cent had been commonplace according to the Premium Wheatgrowers' Association.

Controversy over wheat sale to Egypt. — A controversy has developed between Australian wheatgrowers and the Commonwealth Government over the sale of wheat to Egypt on credit terms.

Apparently some months ago the Australian Wheat Board and the Government had discussed the sale of wheat to Egypt, and more specifically the second part of the three year contract begun in July 1972 which called for the shipment of one million long tons of wheat (37,333,000 bushels) per year with the details of price and terms to be worked out each year. It was agreed at that time that the Government would carry 75 per cent of the risk and the Wheat Board 25 per cent for the second year.

However, with the outbreak of hostilities in the Middle-East the Wheat Board changed its mind on accepting 25 per cent of the credit risk because of the possibility that Egypt would not be able to pay after committing much of its resources to the war effort. The Board came back to the Government and informed them of their decision to only sell to Egypt on a cash basis unless the Government accepted 100 per cent of the credit risk.

As a result the Government used its powers under the Wheat Stabilization Act to order the Wheat Board to sell to Egypt on credit terms with the Government accepting 75 per cent of the risk and the Board 25 per cent. The Government's official view is that developing countries should be able to obtain a fair share of Australia's wheat crop on reasonable terms. To support this view, in August the Government announced that in principle, credit terms of up to 12 months would be available to developing countries for wheat purchases and in exceptional cases where it was decided that credits should be extended beyond 12 months, any additional cost would be borne by the Government. In addition the Government feels it is keeping up the Board's honour in maintaining contractual obligations. Egypt has been a long term customer and the Government feels Egypt should not be abandoned in the face of what could easily prove to be a short term wheat boom.

Although the Government has not mentioned the foreign policy aspect of the move, it does seem to have some political motivation. The Government's foreign policy on the Middle-East is one of neutrality and the Government would not want a refusal to credit terms taken as meaning that Australia was pro-Israel. In addition the Government would also have to consider the possibility of Arab retaliation on oil supplies.

Since the Government action became public knowledge there has been strong protests from farm organizations and the Government Opposition. The strongest protests are coming from Queensland and it was that State's grower representative on the Wheat Board who first broke the story. The critics feel that the move is the first step towards nationalising the wheat industry and they dislike being forced to sell on Government dictated terms when it is the growers' money which is at risk. In addition the move threatens the about to be negotiated new stabilization plan because for such a plan to be implemented it must have complementary State

legislation. If it should happen that a new plan was not accepted by the States, then it would probably spell the end to the Wheat Board. Although this not likely to happen, it has been suggested that Queensland should break away from the Board.

Other Australian wheat sales. - On October 18, the Wheat Board signed a 3 year agreement with China for the sale of up to 173 million bushels of wheat over the three years beginning in January, 1974.

The agreement called for the shipment of 1.1 million tons (41,067,000 bushels) during 1974 and for between 1.5 and 1.8 million tons (56,000,000 to 67,200,000 bushels) to be shipped during each of 1975 and 1976. The actual quantity sold each year will be arranged by commercial contracts between the Chinese Export Corporation and the Wheat Board.

The first contract under the new agreement for the sale of 600,000 tons (22,400,000 bushels), 5 per cent more or less, to be shipped between January 1 and June 30, 1974, was signed at the same time. Further negotiations will take place in June or July to arrange for the sale of the additional 500,000 tons (18,667,000 bushels) to be shipped between July 1 and December 31, 1974.

On a separate mission to Japan, the Board pledged to supply Japan with one million tons (37,333,000 bushels) of this year's new wheat crop. The Board gave Japan a positive assurance that Australia would supply a minimum of 700,000 tons (26,133,000 bushels) of F.A.Q. and Victorian soft wheats for the next 12 months and a minimum of 300,000 tons (11,200,000 bushels) of prime hard wheat.

In addition the Board has held preliminary discussions with East Germany on a possible 5 to 6 year wheat contract starting with the 1974-75 season. The quantities mentioned for the possible agreement were 500 to 600 thousand tons (18,667,000 to 22,400,000 bushels) per year.

Exports of Australian Wheat and Wheat Flour in Terms of Wheat
December 1 - October 27, 1972-73 and Corresponding Period 1971-72

Destination	Wheat		Wheat flour	
	1971-72	1972-73	1971-72	1972-73
thousand bushels				
<u>Western Europe</u>				
EEC:				
Britain	22,374	7,094	236	19
Ireland	1,191	89	-	-
Sub-total	23,565	7,183	236	19
Other Western Europe:				
Malta	565	-	-	-
Norway	4,033	-	-	-
Sub-total	4,598	-	-	-
Total	28,163	7,183	236	19

Exports of Australian Wheat and Wheat Flour in Terms of Wheat
December 1 - October 27, 1972-73 and Corresponding Period 1971-72 - Continued

Destination	Wheat		Wheat flour	
	1971-72	1972-73	1971-72	1972-73
thousand bushels				
<u>Eastern Europe</u>				
Germany, East	16,270	2,954	—	—
U.S.S.R. (Russia) - Far East	16,232	24,407	—	—
- Black Sea ...	—	418	—	—
- Bangladesh ..	—	428	—	—
- Chile	—	2,746	—	—
- India	—	968	—	—
Total	32,502	31,921	—	—
<u>Africa</u>				
Angola	573	—	—	—
Egypt A.R.E.	52,439	22,557	—	—
Kenya	2,382	—	—	—
Malawi	—	—	524	42
Mauritius - Comm.	—	—	721	905
- F. Aid	—	—	182	186
Mozambique	2,130	—	—	—
Rhodesia	1,145	—	—	—
Sudan	1,430	—	—	—
Tanzania	764	—	—	—
Zambia	2,882	1,847	—	—
Others	6	4	367	126
Total	63,751	24,408	1,794	1,259
<u>Asia</u>				
Aden	460	—	—	—
Aden I/T Atta	—	—	21	—
Afghanistan - Comm.	411	—	—	—
- F. Aid	511	146	—	—
Arabian Gulf	575	316	351	350
Arabian Gulf Atta	—	—	1,517	1,415
Bangladesh - Comm.	1,615	—	—	—
- F. Aid	—	462	—	—
Burma - F. Aid	—	—	252	—
China	—	20,381	—	—
Hong Kong	1,969	1,387	16	1
India - F. Aid	1,466	—	—	—
Indonesia	—	—	3	1
- F. Aid	2,939	1,590	—	—

Exports of Australian Wheat and Wheat Flour in Terms of Wheat
December 1 - October 27, 1972-73 and Corresponding Period 1971-72 - Concluded

Destination	Wheat		Wheat flour	
	1971-72	1972-73	1971-72	1972-73
thousand bushels				
<u>Asia - Concluded</u>				
Iran	2,783	—	—	—
Iraq	2,695	—	—	—
Japan	46,411	8,577	—	—
Korea, North	1,852	—	—	—
Korea, South	2,897	—	—	90
Kuwait	4,410	3,110	—	—
Lebanon	1,260	675	—	—
Malaysia	10,348	10,753	—	—
Pakistan - F. Aid	878	679	—	—
Philippines - Comm.	—	—	315	208
- F. Aid	180	129	428	82
Qatar	—	242	—	—
Sabah	—	—	2	1
Sarawak	—	—	—	3
Saudi Arabia	3,133	1,018	342	697
Singapore	5,916	6,123	(1)	2
Sri Lanka	2,719	3,049	—	—
- Comm.	—	—	92	5
- F. Aid	—	—	730	840
Taiwan	4,755	4,820	—	—
Thailand	1,610	1,650	174	71
Yemen	2,587	90	—	—
Others	—	3	156	169
Total	104,380	65,200	4,399	3,935
<u>Oceania</u>				
Fiji	—	216	—	—
- F. Aid	—	—	—	56
New Zealand	550	185	—	—
Total	550	401	—	56
<u>Western Hemisphere</u>				
Bolivia	566	—	—	—
Chile	17,753	5,055	—	—
Peru	4,679	470	—	—
West Indies Area	—	—	70	55
Total	22,998	5,525	70	55
<u>Pacific Area and Sundries</u>				
Pacific Islands	60	60	4,191	3,993
Ships' Stores and Sundries	—	—	108	81
Total	60	60	4,299	4,074
Total, all countries	252,400	134,700	10,800	9,400

(1) Less than 500 bushels.

ARGENTINE SITUATION

Supplies Above Previous Year Estimated total domestic supplies of wheat in Argentina for the 1972-73 (December-November) crop year amounted to 308.1 million bushels, consisting of the December 1, 1972 carryover of 17.9 million bushels, and the production placed at 290.3 million. Indicated supplies for the current Argentine crop year, reflecting a 39 per cent increase in production which more than offset a 28 per cent decline in carryover stocks, are about 32 per cent more than the 1971-72 total of 233.5 million bushels. During December-October 1973 Argentina imported 7.5 million bushels. After making an allowance of 150.0 million bushels for anticipated domestic requirements, an estimated 165.6 million are available for export and for carryover compared with 81.6 million in 1971-72.

Exports Higher than Year Ago Preliminary exports of wheat and wheat flour in terms of wheat equivalent during December 1972 - October 1973 amounted to 121.4 million bushels, sharply above the 59.9 million exported during the same months in 1971-72. The balance remaining on November 1, 1973 for export and for carryover was estimated at 44.2 million bushels, compared to the November 1, 1971 total of 21.8 million.

Argentine Wheat Supplies

Item	1971-72 ^r	1972-73p
	million bushels	
Carryover at beginning of crop year (December 1)(1)	24.8	17.9
Production	208.7	290.3
Total estimated domestic supplies	233.5	308.1
Imports - December-October	-	7.5
Total estimated supplies	233.5	315.6
Less estimated requirements for crop year	151.9	150.0
Available for export and for carryover	81.6	165.6
<u>Deduct</u>		
Exports of wheat as grain, December-October	54.1	115.2
Exports of wheat flour in terms of wheat, December-October	5.7	6.2
Total exports of wheat and wheat flour	59.9	121.4
Balance on November 1 for export and for carryover	21.8	44.2

(1) Includes allowance for farm stocks.

The following account of the Argentine situation has been extracted from a report from Mr. R.F. Place, Commercial Officer (Agriculture) Buenos Aires, under date of November 8, 1973, 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.

There have been no further official announcements on area sown or production since September when an area seeded of 4.2 million hectares (10.4 million acres) was estimated. Trade reports indicate however that the crop is developing favourably following some helpful rains in the last few days. Should prevailing good weather conditions continue, a crop surpassing 5 million metric tons (183.7 million bushels) can be expected.

Although area sown to wheat in general is down 24 per cent from last year, the surface put down to Durums has increased relative to this figure. Sowings of Durums, which continued late into the season, were stimulated by the fact that the government ceiling prices apply only to bread wheat. Trade circles estimate that the 450,000 hectares (1.1 million acres) sown to Durums this year should yield slightly over 500,000 tons (18.4 million bushels), of which 80 per cent should be available for export.

An official decree released at the beginning of October established that the National Grain Board will be the only purchaser of bread wheat (the variety which traditionally makes up the vast majority of Argentine wheat production) for the 1973-74 crop. The same decree fixes the price of hard wheat delivered to the port of Buenos Aires at 67.00 pesos per 100 kilos (\$3.67 per bushel); the former minimum price on this grain, set down by the authorities four months ago, was 57.00 pesos (\$3.12 per bushel).

Harvesting which has commenced in the northern Chaco provinces has been accompanied by serious deliveries difficulties. These difficulties can be attributed directly to the fact that the National Grain Board - who now have a monopoly on purchasing wheat - do not yet have the necessary storage facilities. These storage difficulties will probably be greatly increased when harvesting commences in the more important production areas. During the first week of November the new government has installed a completely new management in the National Grain Board who have already announced a crash building program for storage facilities.

Exports of wheat during September were very low amounting to 4,425 metric tons (163,000 bushels) of bread wheat and 2,000 tons (73,000 bushels) of Durums. Total exports during the period January-September amounted to 2,461,697 tons (90,451,000 bushels) of bread wheat and 376,141 tons (13,821,000 bushels) of Durums. In keeping with the most probable estimate, wheat exports during the closing quarter of the year will be restricted to compliance with small volumes already committed which can probably be covered by diverting grain purchased abroad by the National Grain Board.

By the end of the first week of October, 203,591 metric tons (7,481,000 bushels) of the 453,000 tons (16,645,000 bushels) purchased abroad had been unloaded. Of this amount, all proceeding from the United States, 132,891 tons (4,883,000 bushels) were delivered to Argentina ports while 43,650 tons (1,604,000 bushels) went to Uruguay and 27,000 tons (992,000 bushels) to Chile, covering sales made to these countries.

On November 8, hard wheat was quoted at 57.00 pesos per 100 kilos (\$3.12 per bushel) f.o.r. Buenos Aires; semi-hard wheat at 55.50 pesos (\$3.04 per bushel) and Durums at 85.00 pesos (\$4.65 per bushel). There were no quotations on the Futures Exchange.

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 6, 1973 and is reproduced with the permission of the Trade Commissioner Service, Department of Industry, Trade and Commerce.

General conditions. - Frequent heavy rain occurred during July with temperatures below average and sunshine less than normal. There was widespread lodging particularly of winter-sown crops and mildew was rife. During August the weather improved considerably being mainly hot and dry and providing ideal conditions for harvesting. Some 80 per cent of the cereal crops had been harvested by the end of August compared to just over 50 per cent at the same time last year. This fine weather continued into September until mid-month, when cooler weather prevailed with heavy rain and strong winds, similar conditions predominating during October. The initial dry sunny period, however, enabled completion of the cereals harvest in almost all areas and earlier than usual. Autumn field work was also well advanced. The quality of grain was generally good with the exception of thin and shrivelled grain in lodged crops. There were very few reports of sprouting grain.

Production and yields. - Provisional results of the June 1973 census for the United Kingdom indicate a wheat acreage of 2,855,000 acres, an increase of 69,000 acres (2 per cent) on the previous year. The end of September estimate of wheat yields for England and Wales is announced at 35.4 long cwts. (66.1 bushels) per acre compared with 33.7 long cwts. (62.9 bushels) per acre which was the final estimate for 1972 and which also compares favourably with the three year average 1970-72 of 34 long cwts. (63.5 bushels) per acre. Taking into account estimates for Scotland and Northern Ireland, the wheat crop is expected to be around 5.1 million long tons (190.4 million bushels). Last year's record total for all cereal crops of 15.25 million long tons seems likely to be surpassed.

Consumption and supplies. - Statistics relating to the cumulative intake of wheat by millers and other processors from July 1, 1973 to the end of August 1973 indicate that the pattern of off-take continues to show an increase on the comparable period of the previous year.

Imports of wheat (including flour as wheat) from July 1, 1973 to the end of August 1973 are recorded at 745,000 long tons (27,813,000 bushels) compared with 794,000 long tons (29,643,000 bushels) for the same period last year. Forward commitments notified up to September 14, 1973 for delivery between September 1, 1973 and the end of June 1974 are 969,000 long tons (36,176,000 bushels), a reduction of 1,328,000 long tons (49,579,000 bushels) or 58 per cent.

Stocks of wheat on farms. - Stocks of wheat on farms in Great Britain as at the end of June 1973 were 250,000 long tons (9,333,000 bushels) compared with 160,000 long tons (5,973,000 bushels) as at the end of June 1972. Total stocks as a percentage of total production were 5 1/4 per cent and 3 1/2 per cent for 1973 and 1972, respectively. This is the last of the series of monthly surveys of stocks of wheat from the 1972 harvest.

Cereals deficiency payments. - No cereals deficiency payments are to be made on wheat for the 1972-73 crop year as the average market price of \pounds 1.75 per long cwt. (\$2.29 per bushel, Cdn.) exceeded the guaranteed price of \pounds 1.72 (\$2.25 per bushel). Present indications are that cereals deficiency payments may not be required on the 1973 crop.

Wheat denaturing premium. — The European Economic Community Commission has announced that having reviewed the position in the light of market conditions, the denaturing premium for wheat for the remainder of the current cereals year has been reduced to £3.29 per long ton or 7 UA per metric ton (\$2.15 per bushel, Cdn.) for November, rising by steps of approximately 10 pence per long ton per month to £3.91 per long ton (\$2.55 per bushel) from May to July. This is a further reduction on the level of £5.065 per long ton (\$3.31 per bushel) which was paid for August to October. The rate applies to denaturing both by incorporation and admixture and is applicable in all other Member States with the exception of the Irish Republic. During the six-month period February to July 1973, 1.6 million long tons (59,733,000 bushels) of wheat were denatured in the United Kingdom.

EEC prices for wheat flour 1973-74. — Details have been announced of the threshold price and compensatory amounts for wheat flour which will apply for the year 1973-74.

On August 1 when the United Kingdom took the first step to align its cereals prices with those of other EEC countries, it also started to align the fixed components of the levies with those of the EEC. This component on imports into the United Kingdom of wheat flour is now:

<u>Full Rate</u>	<u>Commonwealth Rate</u>	<u>EEC Rate</u>
8% & £1.76	£1.76	8%
per long ton	per long ton	(excluding Irish
(\$1.15 per bushel)	(\$1.15 per bushel)	Republic)

Extension of prefixation period. — The EEC has now increased the levy prefixation period for cereals and cereal products from 30 to 60 days. This extension has been welcomed by grain traders as a step towards easing trading conditions which they say have been severely restricted by the lack of a realistic prefixation period. This affected the United Kingdom, in particular where trading has traditionally been on a long term forward contract basis.

Grain markets. — Reports of a record grain harvest in Russia and the possibility of export sales have been reflected in the UK market by a considerable fall in futures prices. This tendency has been reinforced by an upward reassessment of the European grain yield and substantial exports from Canada. Domestic wheat futures for November closed at £55.30 per long ton (\$3.62 per bushel) on November 2, 1973.

GRAIN SITUATION IN ITALY

The following account of the current situation in Italy has been extracted from a report received from Mr. U. Boschetti, Commercial Officer, Agriculture, Canadian Embassy, Milan, Italy, under date of November 15, 1973 and is reproduced with the permission of the Trade Commissioner Service, Department of Industry, Trade and Commerce.

General .— The provisional figures for the 1973 wheat crop have been confirmed by the Italian Grain Association as follows:

Soft Wheat 6,200,000 metric tons (227,808,000 bushels)
Durum Wheat 2,700,000 metric tons (99,207,000 bushels)

The total wheat production of 8,900,000 metric tons (327,015,000 bushels) is lower by 500,000 metric tons (18,372,000 bushels) than that of 1972. Additional imports for both varieties are estimated for about 1.0 million metric tons (36,743,000 bushels) for the soft wheat and 0.5 million metric tons (18,372,000 bushels) for durum wheat. In fact, the total consumption for both varieties which has been estimated for 1973-74, is about 11 million metric tons (404,176,000 bushels). As previously reported, the lower production was due to adverse climatic conditions and, in particular, to the heavy and persistent rains which occurred in Winter and Spring.

GRAIN SITUATION IN INDIA

The following account of the current grain situation in India has been extracted from a report received from R.C. Kamo, Commercial Officer Canadian High Commission, New Delhi, India, under date of November 8, 1973 and is reproduced with the permission of the Trade Commissioner Service, Department of Industry, Trade and Commerce.

Under various agricultural development programmes such as Emergency Agricultural Production Programme (EAPP), High Yielding Varieties Programme (HYVP), Multiple Cropping Programme (MCP), and Intensive Agricultural District Programme (IADP), India has been able to bring more area under cultivation thereby increased the productivity of various grains all over the country.

Although no official estimates are as yet available, trade estimated put total wheat production in the country during 1972-73 at about 28 million tons (1,028.8 million bushels) as against earlier estimates of 30 million tons (1,102.3 million bushels). The high yielding varieties have revolutionized wheat production in the country. The increase in wheat output has become an important stabilizing factor in the overall foodgrains production. The cultivation of high yielding varieties of wheat is now being expanded even in non-traditional areas such as East Bihar, West Bengal and Assam. There is an increase of 2.8 per cent in the area under wheat during 1972-73 over the last year. During 1971-72, the area under wheat was 18,502,800 hectares (45.7 million acres) and it has been increased to 19,025,600 hectares (47.0 million acres) during the year 1972-73.

WHEAT SITUATION IN FEDERAL REPUBLIC OF GERMANY

The following account of the wheat situation in the Federal Republic of Germany from a recent report prepared by Mr. K. Schmitz, Commercial Officer (Agriculture) Canadian Embassy, Bonn, and is reproduced with the permission of the Trade Commissioner Service, Department of Industry, Trade and Commerce.

Final 1973 crop results and quality of the 1973 wheat crop. — The quantity and quality of this year's wheat crop must without any doubt be interpreted with regard to extremely favourable weather conditions. Dry and sunny weather during the end of the vegetation period favoured the development of kernels resulting a total wheat production of 7.134 million metric tons (262.1 million bushels), 8 per cent above last year's figures and only slightly below the absolute record wheat production in 1971. Of this total 6.18 million metric tons (227.1 million bushels) were winter wheat, 5.1 per cent more than in 1972, and 0.953 million tons (35.0 million bushels) were summer wheat, an increase of 27.2 per cent compared with the previous year. The total production figure mainly results from higher yields per hectare, which amounted to 44.5 quintals (66.2 bushels per acre) on an all German average, thus exceeding last year's figures by 9.5 per cent. Actually, the acreage under wheat slightly decreased by 1.4 per cent to a total of 1.6 million hectares

(4.0 million acres) and this was the first time in many years that the tendency to continuous enlargement of wheat acreage was interrupted.

This high yield is the more remarkable since protein content at an average of 12.5 per cent and sedimentation values of 29 hardly differ from the 72 record results.

Planting intentions for 1974. - According to the recently published data on the intended fall-sowing acreage no remarkable change in comparison to 1972 may be expected. Acreage under winter barley will be extended by 8 per cent and under winter wheat by 2 per cent.

CALENDAR OF WHEAT EVENTS

- October 24 Wheat stocks in all positions in the United States on October 1, 1973 were estimated at 1,475 million bushels, 21 per cent less than a year earlier.
- November 6 The Canadian Wheat Board announced 1972-73 final payments averaging 47.45 cents per bushel on wheat, 51.63 cents per bushel on barley and 40.80 cents per bushel on oats for producer deliveries during the 1972-73 crop year. For details see page 11 of this publication.
- 8 A report received from Mr. R.F. Place, Commercial Officer (Agriculture) for Canada, Buenos Aires, stated that there has been no further official announcement on area sown or production in Argentina since September when an area seeded of 4.2 million hectares (10.4 million acres) was estimated. Trade reports indicate however, that the crop is developing favourably following some helpful rains in the last few days. Should prevailing good weather conditions continue, a crop surpassing 5 million metric tons (183.7 million bushels) can be expected.
- 12 Mr. C.V. Hiltz, Third Secretary for Canada, Canberra, stated that over the past month, the outlook for the 1973-74 wheat harvest in Australia has deteriorated are rust and rain. Up until mid-October it looked like the coming harvest would yield about 483 million bushels, Australia's second largest crop ever produced. However, a two week period of warm humid weather with heavy rain caused widespread outbreaks of rust in New South Wales and South Australia and to a lesser extent in Victoria.
- 16 Based on conditions at October 22, Canada's 1973 wheat crop was estimated at 628.7 million bushels, 18 per cent above last year's 533.3 million and 2 per cent above the ten-year average of 614.2 million bushels.
- 19 The Canadian Wheat Board stated that changes in domestic selling prices for Prairie feed grains were announced as a result of the latest survey of "off-Board" prices carried out by the Agricultural Products Board.

STATISTICS CANADA LIBRARY
BIBLIOTHÈQUE STATISTIQUE CANADA



1010686927