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QUARTERLY REVIEW

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AGRICULTURAL BRANCH

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THE FEED SITUATION IN CANADA

The supply of feed grains in Canada in relation to live-stock numbers is adequate to maintain a continued high level of production of meats, dairy products and eggs in the crop year 1944-45. The supply of high protein supplements also appears fairly adequate. Hay supplies in eastern Canada are less satisfactory.

Total supplies of feed grains available in Canada during the current crop year total 14.5 million tons, which is 80 per cent higher than available supplies during the 1936-40 period. At the same time the number of grain-consuming animal units has increased by 32 per cent. Since 1942 we have been drawing upon the substantial carry-over of oats and barley provided by the bumper crops of that year. Domestic utilization, plus exports of oats and barley, exceeded production in 1943-44, and are expected to do so again in the current crop year.

During the war feed grain reserves have also been built up to a much safer level than existed in the pre-war period. The maintenance of these reserves has been made possible by the large volume of wheat which has moved into feed channels during the last two years. In this connection it is noteworthy that the consumption of grain, including wheat, per grain-consuming animal unit in 1943-44 was only slightly less than the available supply, excluding wheat.

The outturn of the 1943 grain crops, the details of which are included elsewhere in this report, has not only proved exceptionally favourable, but the geographical distribution of these crops has been such as to ease the transportation problem created by the necessity of moving feed to deficit areas. During the crop year 1943-44 some 29 million bushels of wheat, 52 million bushels of oats and 38 million bushels of barley were moved to the eastern provinces and to British Columbia under the Freight Assistance Policy. The better crops harvested in the East, and particularly in Ontario, this year will permit a reduction in the volume of these shipments in 1944-45. The record of claims made under Freight Assistance indicates that a substantial reduction has already taken place.

The numbers of live stock and poultry on farms as at June 1 of this year, with the exception of hogs, show a generally upward trend. Cattle numbers are 7 per cent higher than in 1943 with the largest increases occurring in the Prairie Provinces. Poultry numbers are up by 16 per cent while the sheep population has also increased by about 8 per cent.

Hog numbers, on the other hand, exhibit a downward trend with a further decrease in prospect. Numbers on farms at June 1 of this year were down 5 per cent from June numbers in 1943. However, the numbers of sows expected to farrow in the last half of 1944 show a decline of 22 per cent, as compared with the last half of 1943; this prospective decrease being most severe in Manitoba, Saskatchewan and Alberta. Although the annual December Survey of sows expected to farrow in the first half of 1945 has not as yet been made, there are indications that farrowings may decrease by 20 per cent in the West, as compared with the first half of 1944.

Should these indications of a decline in hog production be substantiated, the domestic utilization of wheat and barley for feeding purposes in 1945 will likely be reduced. The supply of grain available per grain-consuming animal unit in 1944-45 is lower than during the two preceding years, but substantially higher than the average for the 1936-40 period. This calculation of available feed supplies excludes wheat and makes an allowance for exports of coarse grains at the approximate levels prevailing in 1943-44. Canada's feed supply position is further strengthened by a substantial carry-over of wheat, the feeding value of which has been amply demonstrated by wartime experience.

Although the movement of grain on the lakes during the current navigation season has achieved record proportions, the movement east from Fort William has been small. The reason is to be found in shortage of railway moving stock. Since the movement of grain from country points to the Lakehead terminals has been given priority, cars are not available for the Eastern rail haul. With the close of navigation, however, cars are expected to be available to facilitate the movement of coarse grains to eastern Canada.

High Protein Feeds

Although particular kinds of high protein feeds were not always available to feeders when they desired them, the overall supply picture for high protein feeds was reasonably satisfactory during the past year. The domestic supply of animal proteins has been relatively better than that of vegetable proteins. At the end of 1944 Canada will likely have exported some 16,000 tons of animal proteins and imported a similar quantity of soybean and cottonseed cake and meal. Soybeans and peanuts have also been imported and crushed.

The outlook for 1945 suggests that requirements may be slightly higher than in 1944 with the prospective smaller hog production failing to offset the protein needs of higher numbers of dairy cattle and poultry. However, domestic crushing capacity has been increased and if some imports are again available the Canadian live-stock industry should have access to relatively adequate protein supplies. Supplies of millfeeds are now at record levels, and as European demands for flour seem likely to continue into next year the outlook for 1945 seems fairly encouraging.

Hay Supplies

With yields of hay, clover and alfalfa below average in Ontario this year and with numbers of cattle, sheep and horses above average, hay supplies have been short relatively to demand with a resultant sharp increase in prices during the fall months. Exports to the United States during the first ten months of 1944 totalled 303,000 tons as compared with exports of 182,000 tons in 1943 and 11,000 tons in 1942. The result of this combination of factors has been a reduction of about 16 per cent in the supply of hay per hay-consuming animal unit in eastern Canada, as compared with 1943.

In order to check rising hay prices the Feeds Administrator placed a ceiling price on hay effective October 20. A basic maximum price of \$18.00 per ton is established for baled hay, loaded on cars, sold f.o.b. railway shipping point. Retail ceilings are arrived at by adding transportation costs and specified markups to the original selling price of the primary producer. The issuance of permits for the export of hay to the United States has been discontinued since the application of this maximum price order.

SECOND ESTIMATE OF 1944 GRAIN PRODUCTION

The second estimate of the production of field crops in Canada was issued by the Dominion Bureau of Statistics on November 14, 1944. The production of wheat is now placed at 453.2 million bushels; oats at 522.0 million bushels, barley at 199.1 million; rye at 8.3 million and flaxseed at 9.7 million bushels.

The revision of estimated production has been up for wheat and down for the coarse grains and flax. The acreage seeded to wheat in Saskatchewan has been reduced to 13.2 million acres from the first estimate of 13.8 million acres. However, the increase in average yields more than counterbalanced this reduced acreage and has resulted in the Saskatchewan wheat crop being raised from 253.5 to 260.0 million bushels. For the whole of Canada the wheat crop has been raised by 5.6 million bushels while oats have been lowered by 4.2 million bushels; barley by 4.6 million bushels; rye by 2.3 million bushels and flaxseed by 0.4 million bushels.

The second estimate of the principal crops in Canada, together with the estimates for 1943, are shown below. 1/

Crops	Area		Yield Per Acre		Production	
	1943	1944	1943	1944	1943	1944
	(acres)		(bushels)		(bushels)	
CANADA -						
Fall wheat	601,000	668,000	22.0	31.3	13,222,000	20,908,000
Spring wheat	16,248,700	22,616,200	16.6	19.1	270,438,000	432,332,000
All wheat	16,849,700	23,284,200	16.8	19.5	283,660,000	453,240,000
Oats	15,406,900	14,315,000	31.3	36.5	482,022,000	521,954,000
Barley	8,396,800	7,290,700	25.7	27.3	215,562,000	199,149,000
Fall rye	351,300	417,850	12.7	13.2	4,468,000	5,528,000
Spring rye	224,800	230,100	11.9	12.1	2,675,000	2,773,000
All rye	576,100	647,950	12.4	12.8	7,143,000	8,301,000
Peas, dry	102,200	83,600	15.3	15.7	1,562,000	1,313,000
Beans, dry	85,200	99,500	16.5	14.5	1,407,000	1,440,000
Buckwheat	285,900	256,000	21.8	22.6	6,243,000	5,796,000
Mixed grains	1,463,200	1,518,100	24.4	37.9	35,656,000	57,554,000
Flaxseed	2,947,800	1,323,100	6.1	7.3	17,911,000	9,668,000
Corn, shelled ...	230,000	270,000	33.8	43.6	7,775,000	11,760,000
PRAIRIE PROVINCES -						
Wheat	16,091,000	22,443,800	16.6	19.1	267,000,000	428,300,000
Oats	11,789,500	10,446,900	33.2	37.5	392,000,000	392,100,000
Barley	7,896,000	6,763,400	25.8	27.0	204,000,000	182,800,000
Rye	498,100	572,550	11.8	12.0	5,870,000	6,886,000
Flaxseed	2,918,400	1,297,500	6.0	7.2	17,600,000	9,405,000

1/ It will be noted that the wheat acreage for 1943 has been revised to 16,849,700 acres as compared with the initial estimate of 17,487,700 acres. This revision has been made as a result of a change in the estimate of wheat seeded in Saskatchewan, which has been scaled down to 9,622,000 acres from the first estimate of 10,260,000 acres. This revised estimate is based upon data secured by the Canadian Wheat Board from applications for permits.

FARMERS' MARKETINGS

The deliveries of oats from farms in western Canada between August 1 and November 9, 1944 were about 10 million bushels less than during the corresponding period last year while deliveries of flaxseed are only about one-half those of a year ago. Deliveries of barley and rye, on the other hand, are sharply above last year's primary marketings.

Since the oats crop in the Prairie Provinces has been the same size in each of the last two years and since delivery quotas for oats have also been approximately the same, it appears that farmers are this year taking advantage of the greater opportunity to deliver wheat. All delivery points now enjoy an open quota for barley, whereas most were on a five-bushel quota at this time a year ago. The present open quota is also responsible for the much higher deliveries of rye since farmers could only deliver 3 bushels per seeded acre in 1943. The decline in flaxseed deliveries is largely attributable to the smaller crop this season.

Wheat deliveries during the first 15 weeks of the current crop year exceed 155 million bushels, as compared with 66 million bushels for the comparable period in 1943.

Marketings by provinces are shown in the following table, the records being those of the Statistics Branch of the Board of Grain Commissioners.

Deliveries August 1, 1944 to November 9, 1944

	O A T S		B A R L E Y	
	Bushels	% 1944 Harvest	Bushels	% 1944 Harvest
Manitoba.....	5,382,705	8.8	16,256,903	29.7
Saskatchewan	18,422,459	8.9	24,790,137	33.1
Alberta	6,855,137	5.6	7,104,123	13.4
T o t a l	30,660,301	7.8	48,151,163	26.3
Same Period in 1943 ..	40,587,072	10.4	33,456,562	16.4

	R Y E		F L A X S E E D	
	Bushels	% 1944 Harvest	Bushels	% 1944 Harvest
Manitoba	139,768	22.8	1,134,888	64.4
Saskatchewan	1,631,697	34.0	4,216,368	65.9
Alberta	380,780	25.8	629,238	50.6
T o t a l	2,152,245	31.3	5,980,494	63.6
Same Period in 1943 .	780,205	13.3	12,165,203	69.1

PRODUCTION AND MARKETINGS IN PRAIRIE PROVINCES 1/

Harvest Year	Sown Acreage	Yield Per Acre	Total Production	Carry-over on Farms 2/	Total on Farms	Farmers' Marketings 3/	Per Cent of Supply Marketed
	acres	bu.	bu.	bu.	bu.	bu.	p.c.
<u>OATS</u>							
1939	8,227,000	28.1	231,500,000	26,501,000	258,001,000	35,562,880	13.8
1940	7,818,000	29.3	229,000,000	23,214,000	252,214,000	32,274,610	12.8
1941	8,137,000	21.9	178,000,000	20,137,000	198,137,000	33,206,047	16.8
1942	9,666,000	51.7	500,000,000	11,952,000	511,952,000	120,689,166	23.6
1943	11,789,500	33.2	392,000,000	102,000,000	494,000,000	143,875,904	29.1
5-year average ..	9,127,500	32.8	306,100,000	36,760,800	342,860,800	73,121,721	19.2
1944	10,446,900	37.5	392,100,000	61,830,000	453,930,000	30,660,301 4/	6.8
<u>BARLEY</u>							
1939	3,607,000	22.5	81,000,000	5,826,000	86,826,000	22,008,867	25.3
1940	3,622,000	22.9	83,000,000	5,351,000	88,351,000	20,980,344	23.7
1941	4,735,000	20.0	94,700,000	4,895,000	99,595,000	26,535,412	26.6
1942	6,414,000	37.6	241,000,000	4,194,000	245,194,000	85,571,086	34.9
1943	7,896,000	25.8	204,000,000	40,000,000	244,000,000	85,179,355	34.9
5-year average ..	5,254,800	25.8	140,740,000	12,053,200	152,793,200	48,055,013	29.1
1944	6,763,400	27.0	182,800,000	22,825,000	205,625,000	48,151,163 4/	23.4
<u>RYE</u>							
1939	1,014,100	13.5	13,700,000	345,000	14,045,000	5,228,230	37.2
1940	943,000	13.0	12,250,000	545,000	12,795,000	5,091,064	39.8
1941	861,000	11.6	9,989,000	399,000	10,388,000	5,334,539	51.4
1942	1,246,000	18.5	23,000,000	145,000	23,145,000	9,776,538	42.2
1943	498,100	11.8	5,870,000	6,000,000	11,870,000	4,685,198	39.5
5-year average ..	912,440	13.7	12,961,800	1,486,800	14,448,600	6,023,114	42.0
1944	572,550	12.0	6,886,000	1,000,000	7,886,000	2,152,245 4/	27.3
<u>FLAXSEED</u>							
1939	288,500	6.8	1,950,000	4,800	1,954,800	1,723,980	88.2
1940	363,700	7.9	2,875,000	26,500	2,901,500	2,587,846	89.2
1941	982,000	5.7	5,641,000	14,000	5,655,000	4,902,825	86.7
1942	1,466,000	10.0	14,700,000	19,000	14,719,000	11,359,357	77.2
1943	2,918,400	6.0	17,600,000	385,000	17,985,000	14,417,843	80.2
5-year average ..	1,203,720	7.3	8,553,200	89,860	8,643,060	6,998,370	84.3
1944	1,297,500	7.2	9,405,000	814,000	10,219,000	5,980,494 4/	58.5

1/ Includes Peace River block in British Columbia.

2/ Stocks at end of July.

3/ August 1 to July 31, 1939-40 to 1943-44. Excludes minor quantities loaded over platforms prior to 1940-41.

4/ August 1, 1943 to November 9, 1944.

FEED GRAIN SUPPLIES PER ANIMAL UNIT

GRAIN AVAILABLE

The supply of feed grain available per grain-consuming animal unit for 1944-45 is less than during either of the two preceding crop years since total net supply is down and live-stock numbers have increased. The higher production this year has not proved sufficient to offset the reduced carry-over of feed grains and the increase in numbers of cattle, sheep and poultry has more than offset the decline in the hog population. In spite of this decline feed grain supplies are adequate to meet the requirements of our record live-stock population and supplies per animal unit remain one-third larger than the average for the 1936-40 period.

Wheat has been ignored in arriving at the available supply of feed grain, but the estimated quantities of wheat fed to live stock have been taken into account in the calculation of feed consumed. Allowance has been made in the calculation of available supplies for estimated exports of oats and barley to the United States in the crop year 1944-45, and to the extent that these are not realized the feed grain supplies, apart from wheat, will be increased.

In the compilation of Table I. which follows, the various feed grains have been bulked and converted to a tonnage basis. Carry-over stocks have been added to production each year, and exports, seed requirements, and human food deducted to arrive at the net supply position. The grains included in this calculation are oats, barley, rye, corn, buckwheat and peas.

Table I.- Feed Grain Available Per Grain-Consuming Animal Unit

Crop Year	Net Supply Feed Grain	Grain-Consuming Animal Units	Supply Per Grain- Consuming Animal Unit
	tons		tons
1936-40 (average) .	8,104,843	16,302,000	0.50
1941-42	8,420,634	17,546,000	0.48
1942-43	16,503,882	19,193,000	0.86
1943-44 (revised) .	15,381,666	20,741,000	0.74
1944-45	14,519,713	21,324,000	0.68

GRAIN CONSUMED

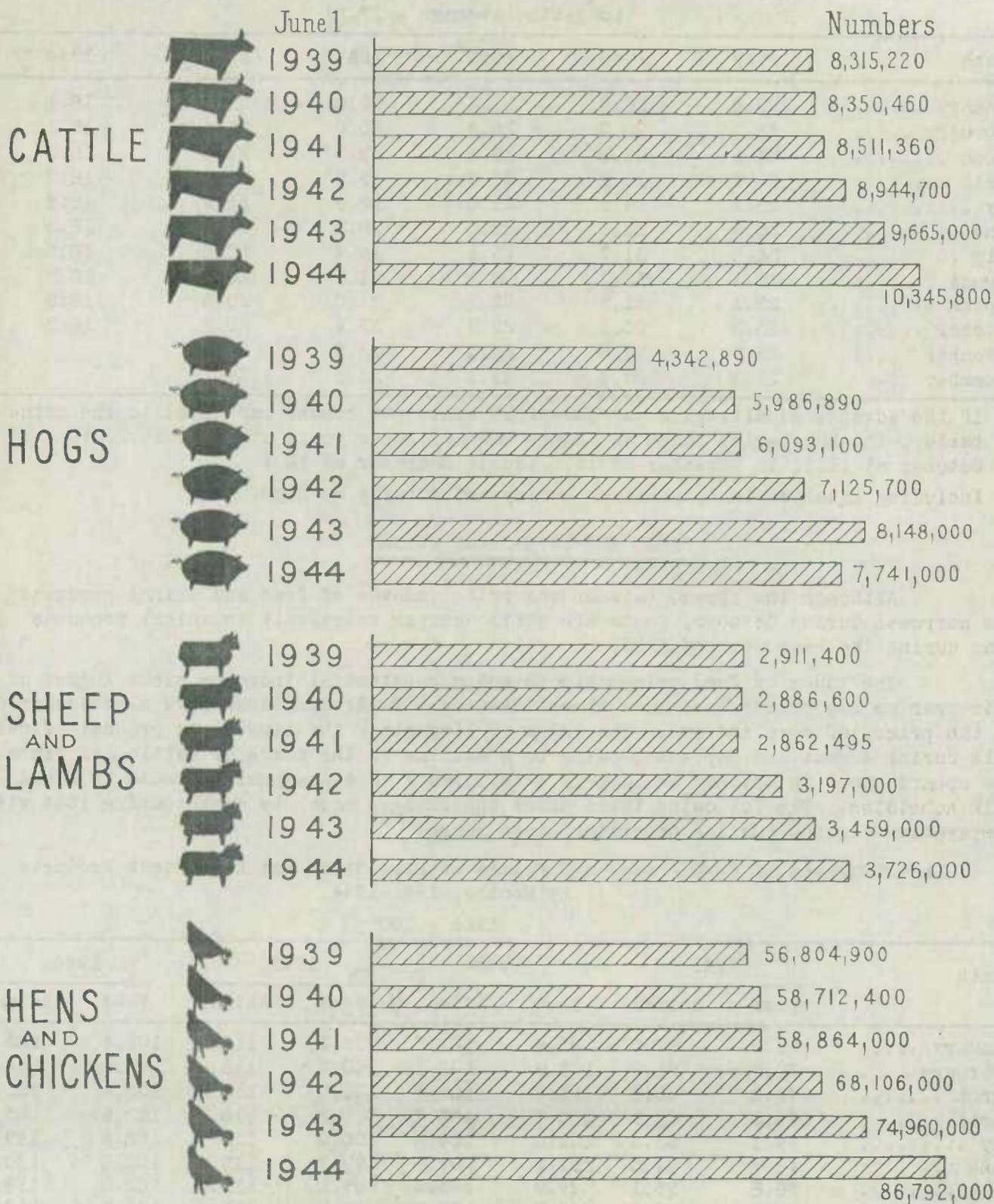
In calculating grain consumption per animal unit wheat fed has been added to those grains included in Table I. The estimate of total consumption is, therefore, net supply less the year-end carry-over of feed grains, plus wheat fed.

Table II.- Grain Consumed Per Grain-Consuming Animal Unit

Crop Year	Amount Consumed	Grain-Consuming Animal Units	Amount Consumed Per Grain-Consuming Animal Unit
	tons		tons
1936-40 (average) .	7,976,643	16,202,000	0.49
1941-42	9,656,034	17,546,000	0.55
1942-43	14,589,282	19,193,000	0.76
1943-44	15,129,331	20,741,000	0.73

It will be noted that the grain consumed per animal unit in 1943-44, including wheat, was just about equal to the supply available, excluding wheat. Prior to 1940 the quantity of wheat fed to live stock was relatively small and with low year-end stocks of feed grains consumption approximated available supplies. The large crops harvested in 1942 following the poor harvest of 1941 nearly doubled Canada's supplies of feed grains and provided reserves to back the great expansion in the production of live stock and live-stock products which was to follow.

WARTIME EXPANSION OF CANADIAN LIVE STOCK POPULATION



HOG-BARLEY RATIO

In the following table is shown the number of bushels of barley equivalent in price to 100 pounds of bacon hog at Winnipeg by months from January 1939 to July 1944.

(Long-time Average = 17.2)

Month	1939	1940	1941	1942	1943 <u>1/</u>	1944 <u>2/</u>
January	29.4	20.5	21.4	20.0	21.4	18.1
February	31.1	20.0	20.4	20.0	21.4	18.1
March	31.1	20.5	17.6	19.7	22.0	18.2
April	27.9	18.9	17.7	19.5	22.0	18.2
May	25.2	24.2	21.0	18.9	21.9	18.2
June	30.3	31.0	22.0	18.3	21.2	18.3
July	34.8	31.7	23.1	19.4	20.5	18.3
August	31.1	32.2	24.9	21.3	20.4	18.3
September	22.3	31.3	22.1	21.0	20.3	18.3
October	23.3	26.1	22.3	23.4	20.2	18.3
November	23.7	21.0	22.4	23.5	20.8	
December	21.2	23.4	21.1	23.5	21.1	

1/ If the advance Equalization payment of 15 cents per bushel was added to the price of barley, the hog-barley ratio in August and September would stand at 16.2, in October at 16.1, in November at 16.5 and in December at 16.7

2/ Including Equalization payment on barley and Subsidy on hogs.

FEED AND LIVE-STOCK PRICES

Although the spread between the price indexes of feed and animal products has narrowed during October, feeds are still cheaper relatively to animal products than during the base year of 1926.

The index of feed prices has posted a substantial increase since August of this year as hay prices have made sharp advances. Small increases have also occurred in the prices of corn and rye. The index of live stock and live-stock product prices fell during August and September owing to a decline in the price of cattle and lambs. The upward trend in October is largely attributable to a seasonal increase in fluid milk subsidies. The following table shows the changes month by month during 1944 with comparative figures for the preceding three years.

Index Numbers of Feed Prices and Prices of Live Stock and Live-Stock Products
by Months, 1941-1944

1926 = 100

Month	1941		1942		1943		1944	
	Feed	Animal	Feed	Animal	Feed	Animal	Feed	Animal
January	69.6	90.0	102.4	101.5	96.3	116.2	101.4	123.8
February	70.7	91.6	105.8	102.1	100.2	116.8	103.0	124.1
March	72.2	91.8	111.2	102.7	100.0	117.8	102.4	123.7
April	74.3	92.2	109.4	103.7	99.2	118.2	102.6	123.4
May	74.1	93.3	109.3	104.8	100.0	118.7	102.8	119.6
June	75.7	94.3	107.2	107.0	99.7	119.4	102.7	120.2
July	78.8	96.1	99.9	103.6	99.1	119.4	102.0	119.0
August	84.7	97.9	93.8	102.9	97.2	118.6	102.1	117.9
September	94.8	99.6	89.8	112.3	97.8	117.6	107.7	117.8
October	97.2	101.1	90.0	115.5	99.8	125.0	115.6	122.0
November	95.8	102.0	88.8	116.3	101.3	125.7		
December	98.0	100.5	93.9	117.3	101.4	126.1		

LAKE AND RAIL MOVEMENT OF GRAIN

LAKE SHIPMENTS

Shipments of grain from Fort William and Port Arthur, by vessel, during the current season of navigation are of record proportions. Although some four weeks of the season still remain, shipments to date already exceed the lake movement during the entire period of navigation in 1928 when about 385 million bushels of grain were moved down the lakes. Total lake shipments this year may amount to 440 million bushels by the close of navigation. This much heavier movement of wheat is in line with the greatly increased volume of wheat exports in 1943-44 and the efforts which are now being made to get a large quantity of wheat into export position. The substantial increase in the shipment of oats reflects the increased movement of this feed grain to the United States and to deficit feed areas in eastern Canada.

Opening of Navigation to November 14

Year	Wheat	Oats	Barley	Rye	Flaxseed	Total
- bushels -						
1938	113,195,871	7,409,769	15,576,057	1,477,134	495,546	138,154,377
1939	148,794,312	14,696,872	15,569,565	3,310,611	290,326	182,661,686
1940	141,488,298	13,450,250	8,861,550	2,748,611	1,114,176	167,662,885
1941	192,725,046	8,062,232	9,044,536	5,194,583	1,496,620	216,523,017
1942	150,552,556	7,269,756	7,165,615	991,137	1,105,954	167,085,018
1943	185,525,717	36,838,465	39,178,053	1,518,654	6,020,344	269,081,233
1944	259,415,988	68,572,732	50,390,152	7,203,335	5,696,178	391,278,385

August 1 to November 14

1944	116,912,957	36,788,804	28,664,843	1,941,559	2,071,377	186,379,540
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RAIL SHIPMENTS

The movement of grain by rail from the Lakehead terminals during the current crop year has been only a fraction of that recorded for a similar period a year ago. Shipments of the coarse grains and flaxseed total only 1.6 million bushels to date, as compared with the exceptionally large volume of 18.1 million bushels in the first 15 weeks of the 1943-44 season. Freight cars have been diverted to the movement of western grain from country points to Fort William-Port Arthur. With the close of navigation it is expected that cars will again be diverted to the eastern rail haul.

In the following table is shown the month by month shipments of the various grains from Fort William and Port Arthur:

1944	Wheat	Oats	Barley	Rye	Flaxseed	Total
- bushels -						
August	91,891	104,111	92,112	-	147,022	435,136
September	169,603	60,650	133,892	3,000	103,391	470,536
October	86,572	147,886	130,979	-	82,533	447,970
November(1-14)	36,267	97,863	52,606	-	62,290	249,026
T o t a l	384,333	410,510	409,589	3,000	395,236	1,602,668

SHIPMENTS TO UNITED STATES

Shipments of wheat, coarse grains and flax to the United States during the first 15 weeks of the crop year total 91.4 million bushels. Wheat comprises over 46 million bushels of this total, but a large proportion of this wheat is intended for **re-export**. The exports of oats and barley exceed those which were made during the comparable period a year ago and practically all of these grains will be retained for use in the United States. The bulk of this movement has been from Fort William-Port Arthur with relatively small shipments being made through other channels.

On August 16 the Feeds Administrator issued an order prohibiting the export of any barley other than that of malting or pearling grades including Nos. 1 and 2 C.W. 2 Row and Nos. 1, 2 and 3 C.W. 6 Row. This order was prompted by the scarcity of barley for feeding purposes in eastern Canada. The promotion of any barley grading No. 1 feed or lower in order to qualify such barley for export was also prohibited, although this order was rescinded on September 18.

The following table shows the shipments of the various grains and the areas from which they have been made during the 15 weeks ending November 9, 1944.

	Pacific Coast Terminals	Western Elevators	Fort William- Port Arthur	Eastern Elevators	Total
- bushels -					
Wheat	675,671	48,627	39,786,952	5,712,007	46,223,257
Oats	258,779	351,419	25,917,955	2,117	26,530,270
Barley	-	685,284	14,809,715	-	15,494,999
Rye	-	-	1,573,839	-	1,573,839
Flaxseed ...	-	-	1,554,743	-	1,554,743
T o t a l ..	934,450	1,085,330	83,643,204	5,714,124	91,377,108

COARSE GRAIN EXPORTS 1943-44

Exports of coarse grains from Canada during the past crop year went mainly to the United States as was also the case in 1942-43. The following are Customs figures for the export of coarse grains and flaxseed to all destinations during 1943-44.

Bushels

Oats	71,276,816
Barley	33,663,212
Rye	9,065,592
Flaxseed	9,971,368

The exports of oats do not include rolled oats and oatmeal, which amounted to an equivalent of 2,569,000 bushels of oats during the crop year.

FREIGHT ASSISTANCE SHIPMENTS

The tabulation of complete data on claims paid on western grain handled under Freight Assistance shows a total of 119 million bushels of wheat, oats and barley moved from the Prairie Provinces to the East and to British Columbia during the crop year 1943-44. Wheat comprised 29 million bushels of this total; oats 52 million bushels and barley 38 million bushels. During the preceding crop year the total movement amounted to about 59 million bushels or approximately one-half that of 1943-44. During this last crop year the percentage of wheat shipped under freight assistance has declined in favour of a larger proportion of oats.

Shipments under freight assistance during the current crop year exhibit a sharp reduction below those of a year ago. The greatest decreases occur in grain consigned to Ontario, which has this fall harvested much larger crops of wheat, oats and barley than in 1943.

In the following tables the provincial distribution of foodstuffs eligible for freight assistance is set out for the crop years 1942-43 and 1943-44.

August 1, 1942 to July 31, 1943

Crop Year	Wheat	Oats	Barley	Rye	Screenings	Millfeeds
	bu.	bu.	bu.	bu.	tons	tons
<u>1942-43</u>						
Ontario	8,515,827	10,256,482	7,055,881	395,963	22,749	203,718
Quebec	6,106,862	7,167,562	6,805,973	135,468	16,532	314,598
New Brunswick	678,671	1,119,947	754,967	27,148	1,417	46,148
Nova Scotia	979,192	1,360,408	1,287,908	19,534	802	51,332
Prince Edward Is. .	393,313	391,776	414,220	3,872	160	12,235
British Columbia ..	2,355,373	1,818,224	863,277	-	173,866	3,342
Total (12 months) .	19,029,138	22,114,399	17,182,226	581,985	215,526	631,373

August 1, 1943 to July 31, 1944

<u>1943-44</u>						
Ontario	14,049,837	30,737,718	18,378,875	138,185	31,430	243,303
Quebec	8,346,480	13,927,376	14,521,942	93,284	10,967	281,976
New Brunswick	867,865	1,714,135	1,322,227	574	856	47,907
Nova Scotia	1,439,040	1,907,106	1,654,200	1,623	449	53,873
Prince Edward Is. .	562,990	429,988	573,219	475	72	14,569
British Columbia ..	3,765,488	3,012,547	1,352,358	-	1,538	64,100
Total (12 months) .	29,031,700	51,728,870	37,802,821	234,141	45,312	705,728

MILLFEED PRODUCTION IN CANADA

During the past crop year the flour milling industry in Canada produced a record volume of by-products. Under the stimulus of the present keen export demand for flour, Canadian flour mills processed some 107 million bushels of wheat which yielded about 795,000 tons of millfeeds. This export business is proving of real value to the domestic live-stock industry in that it provides about one-half of the total volume of millfeeds available. All but 4.5 per cent of these millfeeds have been retained for use in this country by means of a system of export permits.

Although the output achieved during the past year is a record for the industry, it is only slightly above the production of 1943-44. One of the important factors limiting further expansion is the difficulty of securing labour.

The record of claims paid under the Freight Assistance Policy, as shown on page 11 of this Review, indicates that over seven-eighths of the millfeeds fed in Canada are moved to feeding areas under this scheme.

The production and exports of millfeeds since 1937-38 are shown in the following table:

Crop Year	Production	Exports	Exports as % of Production
	tons	tons	%
1937-38	444,586	48,052	10.8
1938-39	555,515	173,275	31.2
1939-40	656,205	276,072	42.1
1940-41	681,083	300,996	44.2
1941-42	686,304	93,800	13.7
1942-43	792,208	51,186	6.5
1943-44*	794,868	36,038	4.5

Monthly production of bran, shorts and middlings during the crop year 1943-44 is shown in the following table. Totals for the crop year 1942-43 are included:

1943-44*	Bran	Shorts	Middlings	Total Millfeed
		- tons -		
August	25,911	25,409	12,542	63,862
September	27,529	26,347	13,167	67,043
October	28,308	27,973	13,531	69,812
November	28,262	28,631	14,164	71,057
December	27,927	28,518	13,827	70,272
January	27,656	25,373	12,965	65,994
February	28,142	26,458	13,147	67,747
March	30,313	29,261	13,583	73,157
April	26,175	24,764	12,048	62,987
May	25,926	25,244	12,676	63,846
June	25,156	23,759	12,398	61,313
July	23,581	22,705	11,492	57,778
T o t a l	324,886	314,442	155,540	794,868
1942-43 (revised)	323,001	304,504	164,703	792,208

* Preliminary

OIL-BEARING SEED CROPS

The preliminary estimate of the production of the four oilseed crops in Canada in 1944 is as follows:

Flaxseed	9,668,000 bushels
Soybean	681,820 "
Rapeseed	6,600,000 pounds
Sunflower seed	8,500,000 "

FLAXSEED

The acreage seeded to flaxseed in 1944 declined to 1,323,100 acres or about 45 per cent of the 2,947,800 acres seeded in 1943. The reduction in output was less pronounced, however, as the 1944 crop is placed at 9,668,000 bushels, as compared with 17,911,000 bushels in 1943. Average yields were 7.3 and 6.1 bushels per acre in 1944 and 1943 respectively. By November 9, 64 per cent of the crop, or about 6 million bushels, had been marketed, which is more than our crushing plants will likely handle in 1945.

The commercial stocks of flaxseed on November 16 amounted to 5,864,431 bushels. Of this total 2,033,000 were in country elevators and 2,640,821 in store at Fort William-Port Arthur. The remainder was located in Interior Terminals, or was in transit by lake or rail.

SOYBEANS

The estimated acreage and production of soybeans, for beans, in Canada in 1944 with the comparative figures for 1943 are as follows:

	<u>Acreage</u>		<u>Yield Per Acre</u>		<u>Production</u>	
	1944	1943	1944	1943	1944	1943
	acres		bushels		bushels	
Ontario	35,800	32,150	18.9	16.9	676,620	544,600
Manitoba	400	2,500	13.0	8.0	5,200	20,000
British Columbia ..	-	900	-	5.0	-	4,500
T o t a l	36,200	35,550	18.8	16.0	681,820	569,100

In addition to the above acreage there were about 8,900 acres of soybeans sown for hay in Ontario this year. There was no commercial production of soybeans in British Columbia in 1943. Although an objective of 90,000 acres was established for this crop for 1943 and again for 1944, seeded acreage for beans has never achieved anything approaching this level. Canada has, therefore, been dependent upon importations of soybeans from the United States to meet domestic needs for oil and meal.

RAPESEED

Commercial production of rapeseed in Canada this year is estimated at 6,600,000 pounds. The distribution of this crop is as follows:

	<u>Acreage</u>	<u>Yield Per Acre</u>	<u>Production</u>
	acres	pounds	pounds
Ontario	600	650	390,000
Manitoba	6,000	700	4,200,000
Saskatchewan	4,800	400	1,920,000
Alberta	630	143	90,000
T o t a l	12,030	540	6,600,000

The 1944 acreage is about three times as great as that seeded in 1943 with the whole of this increase occurring in Manitoba and Saskatchewan. Owing to dry weather the yield in southern Alberta was very disappointing with a substantial proportion of the seeded acreage being abandoned.

The Canadian Wheat Board has been empowered to purchase rapeseed from the 1944 crop at 6 cents per pound with discounts for excess moisture content and admixtures of mustard seed.

SUNFLOWER SEED

The commercial production of sunflower seed in 1944 was confined to the provinces of Manitoba and Saskatchewan as shown below:

	<u>Acreage</u>	<u>Yield Per Acre</u>	<u>Production</u>
	acres	pounds	pounds
Manitoba	11,300	500	5,650,000
Saskatchewan	6,000	475	2,850,000
T o t a l	17,300	491	8,500,000

An objective of 50,000 acres had been established for this crop for 1944. The Canadian Wheat Board has been authorized to purchase sunflower seed at a price of \$5.00 per 100 pounds for No. 1 C.W. Sunrise or No. 1 C.W. Mennonite.

GRADING OF CROPS 1944-45

The following tabulation shows the grading of coarse grain and flaxseed inspected by the Board of Grain Commissioners between August 1 and November 14, 1944. Some old crop grain is included in these inspection returns but the bulk of cars contained grain grown in western Canada in 1944.

<u>OATS</u>	<u>Cars</u>	<u>BARLEY</u>	<u>Cars</u>
No. 2 C.W.	877	1 & 2 C.W. 6-Row	907
No. 3 C.W.	4,271	No. 3 C.W. 6-Row	5,379
No. 1 Feed	5,913	1 & 2 C.W. 2-Row	832
No. 2 Feed	1,006	No. 1 Feed	3,925
No. 3 Feed	126	No. 2 Feed	4,449
Toughs	406	No. 3 Feed	1,159
All Others	3,546	Toughs	3,709
		All Others	244
Total Cars	16,145	Total Cars	20,604
Bushel equivalent	38,747,031	Bushel equivalent	39,044,992
<u>RYE</u>	<u>Cars</u>	<u>FLAXSEED</u>	<u>Cars</u>
1 & 2 C.W.	221	No. 1 C.W.	2,730
No. 3 C.W.	434	No. 2 C.W.	85
No. 4 C.W.	38	No. 3 C.W.	21
Toughs	115	Toughs	37
All Others	67	All Others	10
Total Cars	875	Total Cars	2,883
Bushel equivalent	1,466,745	Bushel equivalent	4,634,913

HIGH PROTEIN FEEDS

Although shortages of specific types of high protein feeds have been apparent at times during the year, the overall supply has been such as to satisfy most of the demand. Although protein requirements for a balanced ration have been estimated at 650,000 tons per year, less than one-half of this quantity is available in Canada. The following table gives the estimated net supply available during the calendar year 1944.

	<u>Net Supply - 1944</u>
	tons
Linseed cake and meal	60,000
Soybean cake and meal	23,000
Sunflower cake and meal	2,300
Rapeseed cake and meal	1,100
Cottonseed cake and meal	1,000
Peanut cake and meal	6,000
Copra meal	3,500
Gluten feed	85,500
Brewers' and distillers' dried grains ...)	
Malt sprouts	
Alfalfa meal	15,000
Total Vegetable Proteins	<u>197,400</u>
Fish meal	23,500
Tankage and blood meal	57,000
Meat scrap	
Milk, buttermilk and whey powder	4,500
Total Animal Proteins	<u>85,000</u>
Total All Proteins	<u>282,400</u>

The outlook for 1945 suggests that the supply of both vegetable and animal protein feeds will be approximately the same as in 1944. The maintenance of the supply of soybean cake and meal is contingent upon the importation of beans for crushing. Production of soybeans in Canada this year totals about 685,000 bushels as compared with approximately 569,000 bushels in 1943. However, only about one-half of these beans find their way to the crushers.

The prospective decrease in protein requirements for a smaller hog population in 1945 is more than offset by an increase in requirements for dairy cattle and poultry, but if crushers are able to secure imports of soybeans the protein supply picture in 1945 promises to remain fairly satisfactory. There has been some expansion in Canadian crushing facilities.



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PRICESMonthly Average of Closing Prices, Basis in Store Fort William-Port Arthur
Crop Year 1944-45

	August	September	October
cents and eighths per bushel			
<u>OATS</u>			
No. 2 C.W.	51/4	51/2	51/4
No. 3 C.W.	51/4	50/6	51/4
No. 1 Feed	51/2	50	51/4
No. 2 Feed	50/1	48/4	50/6
No. 3 Feed	48/7	47	48/6
<u>BARLEY</u>			
Nos. 1 and 2 C.W. 6-Row	64/6	64/6	64/6
No. 3 C.W. 6-Row	64/6	64/6	64/6
Nos. 1 and 2 C.W. 2-Row	64/6	64/6	64/6
No. 1 Feed	64/6	64/6	64/6
No. 2 Feed	64/6	64/6	64/5
No. 3 Feed	64/6	64/6	62/4
<u>RYE</u>			
No. 2 C.W.	105	95/2	104/3
No. 3 C.W.	99/7	90/2	99/6
No. 4 C.W.	94/6	84/5	98
Ergoty	91/6	81/5	90/6
Rejected 2 C.W.	93/6	83/5	92/6
<u>FLAXSEED</u>			
No. 1 C.W.	275	Fixed Prices	
No. 2 C.W.	271		
No. 3 C.W.	262		
No. 4 C.W.	258		
<u>CORN</u>			
3 C.W. Yellow 20% moisture	80	80	80

After pressing against the ceiling of 51 1/2 cents during May, June and July the prices of most of the straight grades of oats declined during the fall months, but are now regaining ceiling levels. The prices of the lower grades of feed barley are below ceiling levels for the first time in 6 months.

Rye prices have nearly regained August levels after a decline of about 10 cents during the month of September. The fixed price for flaxseed has been increased by twenty-five cents per bushel for the 1944 crop.