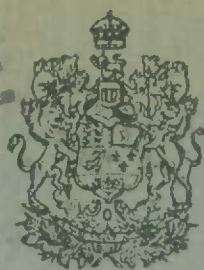


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CANADA



DOMINION BUREAU OF STATISTICS  
AGRICULTURAL BRANCH

Vol. 5

No. 4

# CANADIAN COARSE GRAINS

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## QUARTERLY REVIEW

AUGUST, 1946

Published by Authority of the Hon. James A. MacKinnon, M.P.  
Minister of Trade and Commerce  
Ottawa

Price \$1 a year



# CANADIAN COARSE GRAINS

## QUARTERLY REVIEW AUGUST 1946

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DEPARTMENT OF TRADE AND COMMERCE  
DOMINION BUREAU OF STATISTICS - CANADA  
AGRICULTURAL DIVISION

(Issued August 1946)

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THE FEED SITUATION IN CANADA

New Crop Will Ease Immediate Tight Supply Position - Within the next few weeks when the new crops of oats and barley become available for feeding purposes, the somewhat tight feed grain situation which has prevailed in Canada during the past several months is expected to ease considerably. For the over-all picture of the 1946-47 season, some observations can be made concerning certain factors which may influence the supply situation for the next twelve months.

Coarse Grain Acreages Reduced in Prairie Provinces - Preliminary reports on acreages seeded to field crops in the Prairie Provinces during 1946 indicate that oats and barley acreages have been sacrificed for the sake of wheat. Whereas the latter crop has increased its acreage by 12 per cent above that of a year ago, the areas devoted to oats and barley this year have decreased 11 and 9 per cent respectively. Compared with the objectives set by the Dominion-Provincial Conference last December, oats in the Prairie Provinces failed to achieve their recommended acreage by more than 5 per cent, while the barley acreage was nearly 17 per cent below the Conference recommendations.

Crop Conditions Improved - Crop conditions for the coarse grains, as of July 31, 1946 were considerably better than they were at the same date a year ago, but in the face of indicated acreage reductions for oats and barley this year, it does not appear at this time that crop conditions were sufficiently improved to warrant an estimated production of these crops significantly different to that of 1945. Dry weather early in the season in some areas of Manitoba and Saskatchewan retarded germination and growth of coarse grains and stands are thin with light yields in prospect. The hot, dry weather of early August seems to have been more detrimental to the coarse grains than to the wheat crop, but recent rains have caused some improvement in the later-sown feed grains.

Fall Wheat Production Down - Both fall and spring rye acreages revealed increases this year and the production of fall rye is substantially above that of a year ago. Unfavourable weather in the fall of 1945 reduced Ontario's winter wheat acreage and the resultant outturn totalled 16.1 million bushels as against 20.1 million in 1945. As a rule, much of this wheat is fed on farms where grown. Coarse grains promise well in Ontario, but prospects appear to be somewhat less favourable in Quebec and the Maritimes.

Carry-over Supplies Lower - Another important factor to be considered in the feed grain situation for the present season is the year-end carry-over of old grain supplies. At July 31 of this year the total carry-over of all Canadian grains was substantially below that of the same date in 1945. In view of their productive capacity, the farm carry-over of coarse grains in eastern Canada on July 31 was quite insignificant and the carry-over in western Canada was about 25 per cent smaller than a year ago.

Feed Grain Requirements May Be Lower - While no substantial change in the supply of coarse grains for 1946-47 appears to be in prospect at this time, present indications suggest that requirements may be somewhat less than they were a year ago. Canada's hog population appears to be continuing its decline, with drastic

reductions occurring in the Prairie Provinces where the greatest expansion took place during the war years. At the same time, the prospective fall pig crop in this area appears to be considerably below that of a year ago.

Some Facts About 1945-46 - The feed grain year of 1945-46 was characterized by a supply position which, while sufficient for most of the needs of Canada's live-stock population, required economical utilization and some restrictive export measures in order to ensure against the development of a serious shortage before the end of the season. Although sufficiency was attained for the most part, variety was often limited and towards the end of the year oats had become the mainstay of Canada's feeding program. Early in the 1945-46 season, further barley exports were prohibited to provide the Canadian feeder with every available bushel of this grain, and during the latter part of the season the utmost economy in the use of feed wheat with the substitution of oats where possible, was urged upon the eastern mixed feeds manufacturers and retail feed grain dealers. At the same time, feeders were advised to order no more feed wheat than absolutely necessary for their immediate need and to avoid accumulating supplies.

Marketings of oats and barley by producers in the Prairie Provinces in 1945-46 were considerably below those of the previous year. The season's delivery of oats to July 31, 1946 totalled 106.7 million bushels as against 136.0 million a year earlier. Barley marketings dropped from 76.6 million bushels in 1944-45 to 66.8 million in 1945-46. Flaxseed deliveries displayed the largest percentage decline when they decreased from 7.2 million in 1944-45 to 4.8 million during the past season.

Export shipments to the United States last season only amounted to 17.6 million bushels of oats and 4.2 million bushels of barley as against 74.1 million bushels of oats and 23.8 million bushels of barley during the previous twelve-month period. Total shipments of the five principal grains from Fort William-Port Arthur for 1945-46 amounted to 368.9 million bushels as compared with the all record of more than 500 million bushels a year earlier. Of the 1945-46 total, some 332.4 million bushels were moved by boat. Complete data on the movement of grains from western Canada under the Federal Freight Assistance Policy are not yet available for the crop year, but preliminary figures covering the eleven months ending June 1946 reveal movements of wheat totalling over 24 million bushels, while shipments of oats amounted to over 46 million and those of barley totalled nearly 32 million bushels.

Policy for 1946-47 - Once again, the minimum price of 45 cents per bushel will be guaranteed for No. 2 C.W. oats, basis Fort William-Port Arthur. The oats equalization fund will continue to operate with an advance payment of 10 cents per bushel made on delivery. The minimum price for barley of 60 cents per bushel at the Lakehead will be paid this season. The equalization fund will continue to function with advance payments of 15 cents made at the time of delivery. Where barley is especially selected for malting purposes or for the manufacture of pot or pearl barley, a premium of up to 5 cents per bushel may be paid.

After August 16, 1946 a quota of 10 bushels per seeded acre at all delivery points was imposed on the delivery of oats. While the general delivery quota for barley remains at 10 bushels per seeded acre, there may be delivered from each farm, covered by a delivery permit book, one full carlot of barley, accepted by a maltster or shipper and upon which a premium is to be paid for malting purposes. The car of barley thus shipped is not an addition to the ten-bushel quota. The maximum barley quota is either 10 bushels per seeded acre or one carlot of malting barley, whichever is the greater.

No restrictions will be placed on the deliveries of rye, flaxseed, sunflower seed or rapeseed. The Canadian Wheat Board will pay \$3.25 per bushel, basis in store Fort William-Port Arthur or Vancouver. The prices to be paid by the Board for sunflower seed and rapeseed are 5 and 6 cents per pound respectively, delivered f.o.b. shipping points to be named by the Board.

## FEED GRAIN ACREAGES SEEDED IN 1946

The coarse grain acreages in the Prairie Provinces in 1946 appear to have been sacrificed for the sake of increased wheat acreages. The slight increase in oats and barley acreages, which manifested itself last year, has been reversed and this year's oat acreage in western Canada is at its lowest level since 1942 and the barley acreage is the smallest since 1941. Compared with the 1945 acreages, the area devoted to oats in 1946 has declined 11 per cent while that of barley has been reduced 9 per cent. Considered in the light of the recommendations of the Dominion-Provincial Conference which met in Ottawa last December, coarse grain acreages have failed to reach their suggested goals. Oats in the Prairie Provinces are about 5 per cent below acreage recommendations, while barley acreage is nearly 17 per cent short.

The following table sets out the acreages by provinces for the last six years, together with the five-year average 1936-40. These figures reveal the extent to which the growing of feed grains has expanded since 1940, when increased emphasis was placed on live-stock production.

	<u>Manitoba</u>	<u>Saskatchewan</u>	<u>Alberta</u>	<u>Prairie Provinces</u>
	- acres -			
<u>OATS</u>				
Average 1936-40 ....	1,399,080	4,251,840	2,712,340	8,363,260
1941 .....	1,308,000	4,030,000	2,799,000	8,137,000
1942 .....	1,480,000	4,902,000	3,284,000	9,666,000
1943 .....	1,631,500	6,482,000	3,676,000	11,789,500
1944 .....	1,615,000	5,640,300	3,191,500	10,446,900
1945 .....	1,697,000	5,717,000	3,335,000	10,749,000
1946 .....	1,646,000	5,202,000	3,035,000	9,883,000
<u>BARLEY</u>				
Average 1936-40 ....	1,354,200	1,216,620	1,069,660	3,640,480
1941 .....	1,531,000	1,661,000	1,543,000	4,735,000
1942 .....	2,021,000	2,468,000	1,925,000	6,414,000
1943 .....	2,341,000	3,316,000	2,239,000	7,896,000
1944 .....	2,123,000	2,698,500	1,941,900	6,763,400
1945 .....	2,139,000	2,672,000	2,048,000	6,859,000
1946 .....	1,989,000	2,378,000	1,884,000	6,251,000

Despite decreases in the coarse grain acreages this year, the area seeded to oats in 1946 was nearly 20 per cent greater than the five-year average 1936-40 and in the case of barley, the 1946 acreage is over 70 per cent greater than the average for 1936-40.

While the coarse grain acreage figures are not yet available for the other provinces, farmers' intentions at April 30 with regards to these crops, would indicate that no significant acreage changes are in prospect this season. In the event that actual seeded acreages are in line with intentions figures, it would appear that the area devoted to feed grains for the country as a whole, may be somewhat below those of 1945.

# FARMERS' MARKETINGS, 1945-46

Substantially smaller grain crops and reduced farm carry-over of old grain in 1945 as compared with a year earlier account for the smaller total marketings of all grains in western Canada during the past year as against the season of 1944-45. However, when the total marketings of each grain for each of the seasons 1944-45 and 1945-46 are compared on a percentage basis with their respective crops in 1944 and 1945, it will be seen that with the exception of flaxseed, a greater percentage of the 1945 grain crop production was marketed than in the case of the 1944 crop.

The total marketings of oats during 1945-46 were more than 20 per cent less than in 1944-45, although 39.0 per cent of the 1945 crop was marketed as compared with 36.7 per cent of the 1944 crop. Barley marketings were down more than 10 per cent and deliveries of rye declined more than 25 per cent during the past season. The 1945 flaxseed crop in the Prairie Provinces was the smallest since 1941 and helps to account for the one-third reduction in marketings in 1945-46 as compared with those of 1944-45.

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, 1945 to July 31, 1946

	OATS		BARLEY	
	Bushels	% 1945 Crop	Bushels	% 1945 Crop
Manitoba .....	16,606,135	30.4	24,727,544	47.1
Saskatchewan .....	66,744,376	46.6	31,733,602	58.2
Alberta .....	23,388,168	30.7	10,418,238	28.2
T o t a l .....	106,738,679	39.0	66,879,384	46.4
Same Period in 1945 ....	135,964,571	36.7	76,627,540	43.0

	RYE		FLAXSEED	
	Bushels	% 1945 Crop	Bushels	% 1945 Crop
Manitoba .....	207,174	54.7	1,645,554	58.8
Saskatchewan .....	1,755,786	67.0	2,566,983	67.6
Alberta .....	1,015,003	68.7	561,467	76.1
T o t a l .....	2,977,963	66.5	4,774,004	65.1
Same Period in 1945 ....	4,087,348	57.5	7,172,674	76.3

PRODUCTION AND MARKETINGS IN THE PRAIRIE PROVINCES <sup>1/</sup>

Harvest Year	Seeded Acreage	Yield Per Acre	Total Production	Carry-over on Farms <sup>2/</sup>	Total on Farms	Farmers' Marketings <sup>3/</sup>	Per Cent of Supply Marketed
	acres	bu.	bu.	bu.	bu.	bu.	p.c.
<u>OATS</u>							
1940 .....	7,818,000	29.5	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	120,841,072	23.6
1943 .....	11,789,500	33.2	392,000,000	102,000,000	494,000,000	144,276,857	29.2
1944 .....	10,446,900	35.5	370,800,000	61,830,000	432,630,000	135,964,571	31.4
5-year average .....	9,571,480	34.3	333,960,000	43,826,600	377,786,600	93,312,631	24.7
1945 .....	10,749,000	25.4	273,500,000	54,500,000	328,000,000	106,738,679 <sup>4/</sup>	32.5
<u>BARLEY</u>							
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	85,858,654	35.0
1943 .....	7,896,000	25.8	204,000,000	40,000,000	244,000,000	85,549,252	35.1
1944 .....	6,763,400	26.4	178,400,000	22,825,000	201,225,000	76,627,540	38.1
5-year average .....	5,886,080	26.5	160,220,000	15,453,000	175,673,000	59,110,240	33.6
1945 .....	6,859,000	21.0	144,000,000	17,000,000	161,000,000	66,879,384 <sup>4/</sup>	41.5
<u>RYE</u>							
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	9,863,332	42.6
1943 .....	498,100	11.8	5,870,000	6,000,000	11,870,000	4,690,383	39.5
1944 .....	572,550	12.4	7,109,000	1,000,000	8,109,000	4,087,348	50.4
5-year average .....	824,130	13.5	11,643,600	1,617,800	13,261,400	5,813,333	43.8
1945 .....	410,000	10.9	4,476,000	465,000	4,941,000	2,977,963 <sup>4/</sup>	60.3
<u>FLAXSEED</u>							
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	11,393,906	77.4
1943 .....	2,918,400	6.0	17,600,000	385,000	17,985,000	14,239,167	79.2
1944 .....	1,297,500	7.2	9,405,000	814,000	10,219,000	7,172,674	70.2
5-year average .....	1,405,520	7.4	10,044,200	251,700	10,295,900	8,059,284	78.3
1945 .....	1,034,000	7.1	7,338,000	750,000	8,088,000	4,774,004 <sup>4/</sup>	59.0

<sup>1/</sup> Includes Peace River Block in British Columbia.

<sup>2/</sup> Stocks at end of July.

<sup>3/</sup> August 1 to July 31, 1940-41 to 1944-45.

<sup>4/</sup> August 1, 1945 to July 31, 1946.

# CARRY-OVER STOCKS OF CANADIAN GRAIN AT JULY 31, 1946

The Canadian carry-over of wheat at July 31, 1946 stood at 69,858,181 bushels as against 258,072,830 bushels at the end of July 1945 and is the lowest carry-over figure recorded since 1938. The reduction was due mainly to a small wheat crop in 1945 and the high level of exports achieved during the crop year. Reductions also occurred in the carry-over of oats, rye and flaxseed.

Stocks of grain remaining on farms were also reduced during the crop year. Stocks of wheat on farms at 27,203,000 bushels were moderately below the 28,650,000 bushels on farms at the same date a year ago and compare with 53,871,000 bushels at the end of July 1944. Farm stocks of coarse grains are below those of July 31, 1944.

## Position of Canadian Grain Stocks, July 31, 1946

	<u>Wheat</u>	<u>Oats</u>	<u>Barley</u>	<u>Rye</u>	<u>Flaxseed</u>
	- bushels -				
<u>In Canada</u>					
On Farms .....	27,203,000	51,087,000	13,884,000	253,000	643,000
Country & Pte. Term. Elevs. .	11,200,198	5,446,800	5,868,896	210,363	60,921
Western Mills & Mill Elevs. .	3,974,865	1,329,429	321,643	30,021	65,073
Interior Terminal Elevators .	44,159	874,091	1,078,713	-	47,785
Vancouver-New Westminster ...	1,628,845	730,467	96,301	-	-
Victoria and Prince Rupert ..	-	-	-	-	-
Churchill .....	1,877,737	57	-	-	-
Fort William-Port Arthur ....	3,035,317	3,572,850	2,314,086	70,364	338,017
In Transit - Lakes .....	1,672,784	865,116	532,161	20,000	15,975
In Transit - Rail .....	6,437,303	2,849,757	1,255,765	40,538	12,556
Eastern Elevators .....	9,853,173	7,922,521	3,806,084	81,750	459,932
Eastern Mills .....	2,796,800	543,400	372,500	8,450	-
<b>Total in Canada .....</b>	<b>69,724,181</b>	<b>75,221,488</b>	<b>29,530,149</b>	<b>714,486</b>	<b>1,643,259</b>
<b>Canadian Grain in U.S.A. ....</b>	<b>134,000</b>	<b>-</b>	<b>104,540</b>	<b>-</b>	<b>-</b>
<hr/>					
<b>Total Canadian Grain in Canada and United States ...</b>	<b>69,858,181</b>	<b>75,221,488</b>	<b>29,634,689</b>	<b>714,486</b>	<b>1,643,259</b>
<hr/>					
<u>Carry-over on July 31, 1945 - Revised</u>					
In Canada .....	238,480,041	94,749,878	28,253,191	2,023,933	2,932,111
In United States .....	19,592,789	3,505,284	665,990	-	-
<b>Total in Canada and U.S.A. ..</b>	<b>258,072,830</b>	<b>98,255,162</b>	<b>28,919,181</b>	<b>2,023,933</b>	<b>2,932,111</b>

A small crop of feed grains in Canada last year coupled with a fairly heavy feeding program during the 1945-46 season has resulted in a further reduction of farm-held stocks of grain this year as compared with 1944 and 1945. Despite the substantial shipments of feed grains into eastern Canada under the Federal Freight Assistance Policy, the July 31, 1946 feed supplies in that area were at very low levels when considered in the light of the present productive capacity of these provinces.

The condition of the coarse grain crops in Canada as of July 31, 1946 was substantially better than at the same date a year ago. Offsetting this favourable situation, however, is an indicated reduction in the acreage devoted to these crops this year. Consequently, there seems to be little prospects of any substantial increase in feed grain production for the present season.

On July 31, 1945 the farm stocks of wheat in the Prairie Provinces amounted to 27.0 million bushels, while the carry-over of oats totalled 54.5 million bushels and barley 17.0 million. Rye stocks in 1945 aggregated 465,000 bushels, or more than twice the amount carried over this year, while flaxseed stocks this year were nearly 15 per cent less than a year ago. The farm-stock position in each of the three Prairie Provinces at the end of July 1946 was as follows:

Farm Stocks in Prairie Provinces, July 31, 1946

	<u>Wheat</u>	<u>Oats</u>	<u>Barley</u>	<u>Rye</u>	<u>Flaxseed</u>
	- bushels -				
Manitoba .....	1,773,000	6,166,000	2,830,000	7,400	57,000
Saskatchewan .....	15,283,000	21,688,000	4,966,000	111,000	489,000
Alberta .....	8,785,000	13,048,000	5,454,000	97,000	89,000
Prairie Provinces .	25,841,000	40,902,000	13,250,000	215,400	635,000

A general decline in the carry-over of farm-held grain stocks in the feed-deficit areas of eastern Canada and British Columbia was quite evident, except in the case of Quebec. The year-end stocks of grain in that province revealed a gain of nearly 40 per cent as compared with the same date a year ago. In eastern Canada year-end stocks in Ontario displayed the greatest absolute decline, while the largest decrease on a percentage basis occurred in Nova Scotia. The position in each of the nine provinces is shown in the following table:

	<u>Wheat</u>	<u>Oats</u>	<u>Barley</u>	<u>Rye</u>	<u>Flaxseed</u>
	- bushels -				
Prince Edward Island	-	220,000	8,000	-	-
Nova Scotia .....	-	96,000	2,000	-	-
New Brunswick .....	-	711,000	15,000	-	-
Quebec .....	36,000	4,166,000	228,000	11,000	-
Ontario .....	1,250,000	4,849,000	376,000	25,000	-
Manitoba .....	1,773,000	6,166,000	2,830,000	7,000	57,000
Saskatchewan .....	15,283,000	21,688,000	4,966,000	111,000	489,000
Alberta .....	8,785,000	13,048,000	5,454,000	97,000	89,000
British Columbia ...	76,000	143,000	5,000	2,000	8,000
Total - Canada .....	27,203,000	51,087,000	13,884,000	253,000	643,000
July 31, 1945 .....	28,650,000	64,825,000	17,819,000	505,000	754,000

## 24-YEAR RECORD OF COARSE GRAIN CARRY-OVER

With the exception of barley, the carry-over of Canadian grains as of July 31, 1946 reveals a continuation of the decline from the high bench marks of 1943. Since 1943 the year-end carry over stocks of oats have been cut in half. Scarcity of other feed grains during 1945-46 necessitated an increasing dependence on oats for the Canadian feeding program, with the result that the carry-over at the end of July 1946 was down to 75.2 million bushels as against 98.3 million at the same date in 1945.

A discontinuance of barley exports from Canada during the greater part of the past season has been instrumental in maintaining the carry-over stocks slightly above the year-end carry-over figure of a year ago. However, they have been reduced substantially below the high marks of three years ago. July 31 rye stocks this year are at their lowest level since 1937.

The following is a 24-year record of the carry-over of Canadian coarse grain and flaxseed both in Canada and the United States.

	Oats	Barley	Rye	Flaxseed
	- bushels -			
September 1, 1923 ....	21,711,431	3,507,614	3,344,205	203,900
August 1, 1924 ....	55,144,854	3,529,753	2,588,567	554,329
1925 ....	35,370,628	4,606,415	1,322,488	1,540,414
1926 ....	46,140,394	8,562,809	1,354,833	2,603,714
1927 ....	23,079,267	5,684,767	1,307,145	2,068,869
1928 ....	28,665,256	6,589,531	2,088,714	1,296,347
1929 ....	45,301,314	13,271,663	4,294,819	524,281
1930 ....	21,723,135	24,637,747	9,795,946	538,412
1931 ....	63,444,729	29,580,254	14,419,542	833,914
1932 ....	29,849,319	7,195,655	5,766,334	1,321,358
1933 ....	42,044,758	11,338,322	6,006,488	1,179,575
1934 ....	31,060,497	11,092,030	4,050,207	471,295
1935 ....	26,470,703	6,018,787	3,165,715	312,979
1936 ....	40,379,860	10,234,224	3,685,252	269,287
1937 ....	18,266,043	4,796,213	408,864	464,967
1938 ....	19,498,653	6,630,934	1,000,576	219,027
1939 ....	48,887,155	12,804,186	2,921,434	118,822
1940 ....	46,931,028	12,653,875	5,351,661	583,307
1941 ....	41,563,379	10,642,658	4,919,122	620,313
1942 ....	28,607,188	10,821,462	3,353,203	1,027,040
1943 ....	149,340,515	69,278,502	15,267,755	3,740,121
1944 ....	108,479,383	45,949,269	5,594,285	3,648,642
1945 ....	98,255,162	28,919,181	2,023,933	2,932,111
1946 ....	75,221,488	29,634,689	714,486	1,643,259

## SHIPMENTS OF FEED GRAIN TO THE U.S.A.

The smaller supplies of feed grains in Canada during the 1945-46 season as compared with a year earlier were reflected in the drastically reduced shipments of these grains to the United States during that period. According to the Statistics Branch of the Board of Grain Commissioners only 17.6 million bushels of oats and 4.2 million bushels of barley were shipped to the United States during the period August 1, 1945 to July 31, 1946 as against 74.1 million bushels of oats and 23.8 million bushels of barley during the previous twelve-month period.

Action on the part of the Feeds Administrator was largely responsible for the sharp curtailment of the feed grain movement southward. Early in the 1945-46 crop year, barley exports to all destinations were prohibited and oats shipments placed on an export permit basis. While small quantities of barley have continued to move out of the country throughout the greater part of the season, they have been shipments against commitments made prior to the institution of the embargo.

The total vessel movement of oats to the United States amounted to nearly 13 million bushels or more than 70 per cent of the total shipments. It is interesting to note that the entire amount shipped by boat was consigned to Buffalo from the Lakehead.

As in the case of oats, 1945-46 witnessed a barley movement to the United States made largely over the water route. Out of the total of 4.2 million bushels exported nearly 4 million were moved by boat during the past season. Of this amount 3 million bushels were shipped from Fort William-Port Arthur to the twin ports of Duluth-Superior. The remainder was sent to Buffalo. Almost all of the barley moving by rail was shipped from country points and amounted to only .2 million bushels. Since the week ending March 14, 1946, no barley has been moving into the United States.

Grades of oats and barley shipped to the United States from Canada included 30 per cent of the higher quality grains, while the remainder was made up of feed and other grades. During the crop year 1945-46, the figures reveal that only .6 million bushels of No. 3 C.W. six-row represented the entire higher grades of barley shipped south. At the same time, oats shipments included 5.7 million bushels of Nos. 2 C.W., Ex. 3 C.W., and 3 C.W. oats. This amount almost equals one-third of the total movement of oats by rail and water to the United States.

### Outlook for 1946-47

Estimates based on August 1 condition figures place the United States oats crop for 1946 at 1,499 million bushels, only 49 million bushels below the all-time record crop produced in 1945. However, the barley crop at 251.8 million bushels is about 5 per cent below the 1945 production and the smallest since 1937.

Carry-over stocks of oats as of July 1 this year totalled 281 million bushels as against 219 million bushels a year ago, while barley stocks at June 1, 1946 were estimated at 51.5 million bushels, 26 million less than a year earlier, the smallest carry-over since 1938.

With a record crop of corn in prospect this year, the indicated supply of feed grain for the 1946-47 season, including carry-over of old-crop grain plus new production, is the largest on record, both in total tonnage and on the basis of animals to be fed. Consequently, it is felt that the extremely tight feed situation which has existed in the United States for several months has passed its most critical stage and it is expected to ease materially during the next few months.

# RAIL MOVEMENT FROM FORT WILLIAM—PORT ARTHUR

Total shipments of grain from Fort William-Port Arthur by rail during the crop year 1945-46 were about 30 per cent larger than they were for the same period a year ago. The greater part of this increase can be attributed to the substantially increased movement of wheat which rose from 5.8 million bushels in 1944-45 to 13.0 million in 1945-46. While barley and rye shipments posted slight gains during the past year, oats shipments declined slightly. Need for wheat to export to starving Europe undoubtedly placed the emphasis on the shipments of this grain which accounted for about 40 per cent of the total rail movement of grain from the Lakehead in 1945-46.

The seasonal decline in rail shipments from Fort William-Port Arthur which usually occurs after the opening of navigation in the spring was retarded somewhat during May and June and may be accounted for in part by the Canadian seamen's strike on the Great Lakes at that time.

The following table shows the shipments monthly during the present crop year, together with comparative figures for last season.

	Wheat	Oats	Barley	Rye
	- bushels -			
1945-46				
August .....	23,255	119,004	73,451	28,000
September .....	57,533	245,986	233,729	11,000
October .....	73,776	224,426	123,897	3,000
November .....	99,197	135,740	35,941	21,732
December .....	2,280,636	1,035,367	688,060	11,310
January .....	4,533,707	2,313,500	1,624,006	183,000
February .....	1,127,764	1,192,514	824,524	37,450
March .....	2,223,266	1,756,601	799,149	230,982
April .....	1,015,730	2,157,563	1,063,837	35,891
May .....	536,462	1,093,681	524,346	20,614
June .....	920,233	964,538	282,190	25,500
July .....	130,276	806,941	293,199	4,000
T o t a l .....	13,021,835	12,045,861	6,566,329	612,479
1944-45				
August .....	91,891	104,111	92,112	-
September .....	169,603	60,650	133,892	3,000
October .....	86,571	147,886	130,979	-
November .....	97,512	219,456	118,020	2,000
December .....	1,236,339	2,485,676	848,466	27,829
January .....	1,936,038	3,667,010	1,081,368	64,091
February .....	764,629	2,095,612	919,559	21,507
March .....	1,091,909	2,372,905	1,615,269	39,828
April .....	196,042	1,374,638	567,098	4,500
May .....	66,154	195,700	148,845	9,500
June .....	58,642	84,795	98,946	16,500
July .....	52,726	82,538	54,106	10,500
T o t a l .....	5,848,056	12,890,977	5,808,660	199,255

## FREIGHT ASSISTANCE SHIPMENTS

During the eleven-month period ending June 30, 1946 more than 102 million bushels of western Canadian feed grains were moved into eastern Canada and British Columbia under the Federal Freight Assistance Policy. This amount compares with some 91 million bushels shipped under this scheme during the corresponding period a year earlier. This increase in 1945-46 can be largely attributed to the less favourable crop conditions prevailing in the Canadian feed-deficit provinces and the resultant smaller feed grain supplies available in these areas during the past season as compared with the previous year.

Shipments of oats displayed the greatest increase, while wheat and barley revealed only moderate gains. With rye prices maintained at a high level during the past season, very little of it has found its way into eastern feed-lots by way of the Freight Assistance plan. Screening shipments were reduced considerably in 1945-46, while the movement of millfeeds remains substantially unchanged. Nearly one-half of the total grain shipments during the 1945-46 period was consigned to Ontario, with Quebec claiming the second largest share.

The following tables contain the distribution of shipments for the first eleven months of 1945-46 and the crop year 1944-45.

### August 1, 1945 to June 30, 1946

	Wheat	Oats	Barley	Rye	Screen- ings	Mill- feeds
	bu.	bu.	bu.	bu.	tons	tons
<u>1945-46</u>						
Ontario .....	11,150,398	22,921,240	14,528,564	977	31,112	227,582
Quebec .....	7,990,090	15,406,858	12,979,475	1,155	15,803	283,819
New Brunswick .....	860,320	1,966,333	1,349,148	-	2,590	49,692
Nova Scotia .....	953,611	2,164,137	1,407,638	-	879	51,241
Prince Edward Island .	488,929	498,141	510,525	-	86	13,428
British Columbia .....	3,292,058	3,307,834	1,071,615	-	2,404	58,511
Total (11 months) ....	24,735,406	46,264,543	31,846,965	2,132	52,874	684,273

### August 1, 1944 to July 31, 1945

<u>1944-45</u>						
Ontario .....	11,573,820	20,578,206	12,802,125	9,371	39,026	234,870
Quebec .....	8,294,162	14,887,094	13,390,619	9,227	23,893	300,675
New Brunswick .....	883,238	1,751,805	1,348,448	150	2,530	50,828
Nova Scotia .....	1,130,533	1,931,518	1,409,856	70	687	58,348
Prince Edward Island .	407,586	243,291	412,690	-	216	11,883
British Columbia .....	3,742,623	3,303,573	1,213,608	36	1,889	62,331
Total (12 months) ....	26,031,962	42,695,487	30,577,346	18,854	68,241	718,935

## HOG-BARLEY RATIO

In the following table is shown the number of bushels of No. 1 Feed barley equivalent in price to 100 pounds of B-1 hog at Winnipeg, by months, from January 1941 to July 1946.

(Long-time Average = 17.2)

	1941	1942	1943 <u>1/</u>	1944	1945 <u>2/</u>	1946 <u>2/</u>
January .....	21.4	20.0	21.4	18.1	18.3	17.1
February .....	20.4	20.0	21.4	18.1	18.3	17.3
March .....	17.6	19.7	22.0	18.2	18.3	17.1
April .....	17.7	19.5	22.0	18.2	18.4	18.9
May .....	21.0	18.9	21.9	18.2	18.5	19.0
June .....	22.0	18.3	21.2	18.3	19.0	19.0
July .....	23.1	19.4	20.5	18.3	19.1	19.1
August .....	24.9	21.3	20.4	18.3	18.0 <u>3/</u>	
September .....	22.1	21.0	20.3	18.3	18.2 <u>3/</u>	
October .....	22.3	23.4	20.2	18.3	17.2 <u>3/</u>	
November .....	22.4	23.5	20.8	18.3	17.0	
December .....	21.1	23.5	21.1	18.3	17.0	

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.

3/ Revised.

## FEED AND LIVE-STOCK PRICES

During the past three months the margin between the index of live stock and animal product prices and that of feed prices increased nearly 6 points and can be attributed to an increase in the former and a decline in the latter index. Lower prices for hay more than offset increased rye prices to give an over-all loss for the feed price index. The index of live stock and animal products prices rose sharply above the April figure as a result of increased prices for lambs, hogs and eggs.

Index Numbers of Feed Prices and Prices of Live Stock and Live-Stock Products  
by Months, 1943-1946 (1926 = 100)

Month	1943		1944		1945		1946	
	Feed	Animal	Feed	Animal	Feed <u>1/</u>	Animal	Feed	Animal
January ..	96.3	116.2	101.4	123.8	115.5	122.7	108.3	125.0
February .	100.2	116.8	103.0	124.1	117.3	122.7	108.3	126.0
March ....	100.0	117.8	102.4	123.7	118.3	123.6	105.7	126.1
April ....	99.2	118.2	102.6	123.4	113.6	124.2	104.6	126.5
May .....	100.0	118.7	102.8	119.6	113.0	121.1	105.4	127.7
June .....	99.7	119.4	102.7	120.2	113.7	122.4	104.8	130.5
July .....	99.1	119.4	102.0	119.0	114.2	122.3	102.8	130.6
August ...	97.2	118.6	102.1	117.9	109.3	121.4		
September.	97.8	117.6	107.7	117.8	108.5	119.5		
October ..	99.8	125.0	115.6	122.0	107.0	124.8		
November .	101.3	125.7	116.1	122.5	106.9	125.5		
December .	101.4	126.1	116.4	122.0	108.3	125.4		

1/ Revised.

## CONSUMPTION OF FEED GRAINS IN CANADA

When compared with the data of the previous year, preliminary estimates for the crop year 1945-46 indicate that the domestic consumption of oats and barley in Canada declined by about 15 and 12 per cent respectively. Since the amounts used for human food, seed and industrial purposes remain fairly constant from year to year, the decrease in domestic consumption can be largely attributed to smaller quantities used as live-stock feed during the past season.

While the domestic disappearance of Canadian feed grain in 1945-46 was substantially below the peak domestic consumption years of 1942-43 for oats and 1943-44 for barley, it was still well above the five-year average of 1934-35 to 1938-39. Only once since 1939 has the domestic consumption of oats fallen below the five-year average.

The bumper crops of 1942 provided ample supplies for the sharp mid-war increase in domestic feed-grain consumption and during 1942-43 the disappearance of oats soared to 469 million bushels. A year later barley reached the high mark of 203 million bushels. Since that time, smaller crops, reduced year-end carry-over stocks and a declining live-stock population have resulted in a gradual but steady decrease in the amounts of oats and barley consumed in Canada.

During the past few years the domestic utilization of oats for human food and seed is estimated to be about 35 to 38 million bushels, while the use of barley for food, seed and industrial purposes ranges between 17 and 20 million bushels. Live-stock feed and waste account for the remainder.

The following is a summary of the total disposition of the oats and barley crops during the past twelve years:

	Domestic Disappearance <u>1/</u>	Exports	Carry-over
	- million bushels -		
<u>Oats</u>			
Average 1934-35 to 1938-39 ....	312	11	30
1939-40 .....	362	24	47
1940-41 .....	371	15	42
1941-42 .....	306	12	29
1942-43 .....	469	63	149
1943-44 .....	448	75	108
1944-45 .....	418	92	98
1945-46 (estimate) .....	358	47	75
<u>Barley</u>			
Average 1934-35 to 1938-39 ....	66	14	9
1939-40 .....	92	11	13
1940-41 .....	103	3	11
1941-42 .....	108	2	11
1942-43 .....	167	34	69
1943-44 .....	203	36	46
1944-45 .....	171	41	29
1945-46 (estimate) .....	151	6	30

<sup>1/</sup> Includes human food, animal feed, seed, waste and industrial use.

## HIGH PROTEIN FEEDS

In compiling this table it was impossible to determine the breakdown of Canada's oilcake and meal exports according to their derivation and thus subtract from each of the cake and meal products its export quantity to arrive at the exact number of tons of each product available for domestic consumption. Consequently, it should be kept in mind that exports of oilcake and meal totalled 1,154 tons in 1945 and 1,051 tons during the first six months of 1946.

However, these quantities do little to alter significantly the over-all supply of Canada's high-protein feeds available during the first six months of 1946. When compared with supplies of the same period of a year ago, they appear to be somewhat smaller. A gain of over ten per cent in the supplies of vegetable protein feed supplies available during the January to June period of this year has been more than offset by a substantial decline in supplies of protein feeds derived from animal by-products. This shortage of animal proteins has created a big demand for vegetable proteins.

In the production of vegetable proteins this year substantial gains have been noted in the case of soy bean cake and meal, with the six-month production of 1946 about equal to the total production of the entire year of 1945. Alfalfa meal too, is experiencing expanding production. The restricted use of grains for alcoholic purposes has curtailed the production of brewers' and distillers' high-protein by-products. Reduced slaughterings of live stock and the part-time operation of fish meal plants on the Pacific Coast from January to June of this year has cut the production of animal proteins as compared with a year ago.

The outlook for high-protein feed supplies in 1946-47 appears to differ little from that of the past season. Therefore, the suggestion of economical feeding proposed a year ago, seems no less applicable this year if supplies are going to meet minimum requirements.

The following table sets out the total amounts of available protein feeds, January to June 1946, along with supplies available in 1945:

	Total Supply January-June 1946	Total Supply 1945
	- tons -	
Linseed cake and meal .....	39,748	86,512
Soy bean cake and meal .....	24,058	24,194
Sunflower cake and meal .....	811	1/
Rapeseed cake and meal .....	867	2,133
Copra cake and meal .....	3,845	7,043
Palm kernel meal .....	-	2,899
Peanut cake and meal .....	7,342	11,615
Cottonseed cake and meal .....	-	-
Gluten feed .....	16,500	33,000
Brewers' and distillers' dried grains ....	20,000	45,000
Malt sprouts .....	3,000	6,500
Alfalfa meal .....	16,500	30,000
<b>Total Vegetable Protein .....</b>	<b>132,671</b>	<b>248,896</b>
Fish meal .....	8,200	27,058
Tankage, blood meal, meat scrap .....	16,215	40,638
Milk, buttermilk and whey powder 2/.....	1,800	3,500
<b>Total Animal Protein .....</b>	<b>26,215</b>	<b>71,188</b>
<b>Total Protein Supplies .....</b>	<b>158,886</b>	<b>320,084</b>

1/ Confidential, only one firm reporting.

2/ Estimated amount used by the prepared stock and poultry feeds industry.

## GRAIN CORN

Preliminary acreage figures for 1946 indicate that the area sown in Canada to grain for corn was 244,000 acres, only about 3 per cent above the 1945 figure of 237,000 acres. Since 1942, when the Canadian corn grain acreage reached its all-time record of 358,000 acres, the area sown to this crop has been maintained at a much lower level, ranging all the way from 25 to 35 per cent below the 1942 figure. The significant feature in this decline has been the sharp reduction in the Manitoba corn grain acreage since the peak year. Manitoba, the only area outside of Ontario to produce husking corn in Canada, entered the field in 1941, and planted 100,000 acres the following year. Since then, its acreage has fallen precipitously and during this season only 8,000 acres were devoted to this crop. Ontario, on the other hand, has been able to maintain its corn grain acreage somewhat more consistently.

A good crop of corn would be most welcome this year as corn for industrial use has been in extremely short supply for well over a year. Normally, domestic requirements total between 10 to 12 million bushels annually with the starch and glucose industries consuming about one-half of this amount, and substantial quantities being directed into the stock and poultry feed industries. In recent years between 40 and 50 per cent of the domestic crop has been marketed as commercial grain, the remainder being fed to live stock on the farms where it is grown.

Acreage and production of grain corn in Canada during the past several years were as follows:

	<u>Acreage</u> acres	<u>Yield</u> bu.	<u>Production</u> bu.
1938 .....	180,100	42.7	7,690,000
1939 .....	183,200	44.2	8,097,000
1940 .....	186,000	37.4	6,956,000
1941 .....	320,400	41.7	13,362,000
1942 .....	358,000	40.1	14,372,000
1943 .....	230,000	33.8	7,775,000
1944 .....	270,000	43.3	11,700,000
1945 .....	237,000	43.7	10,365,000

Usually no difficulty is encountered in obtaining the balance of domestic commercial corn requirements through import channels. However, the 1945 harvest season in the United States was similar to the extremely wet season experienced in Canada, and owing to the resultant high moisture content of much of the corn in that country large quantities had to be fed to live stock in the area where it was grown. In addition, a stringent feed situation prevailing in the United States during the 1945-46 season was instrumental in further restricting American exports. As the United States has been the only source of Canadian import supplies of corn since 1941 until this year, total corn shipments into Canada during the 1945-46 season were the smallest in several years.

During June heavy rains in south-western Ontario caused extensive flooding and considerable damage to the corn crops in the two most productive counties, Essex and Kent. However, as soon as conditions permitted much of the flooded land was replanted and at July 31 the corn grain condition figure for the country as a whole was 91 per cent or 14 points higher than a year ago.

At the same time, a record crop of 3.5 million bushels was indicated in the United States at August 1. With a somewhat smaller live-stock population and an overall supply of feed grains, estimated to be the largest on record, there is a possibility that somewhat larger corn imports may be forthcoming from the United States during 1946-47. Furthermore, imports of Argentine corn into Canada, which were cut off in 1941, were resumed this year.

## MILLFEEDS

Millfeeds production in Canada is still being maintained at very high levels. During the first eleven months of the year 1945-46, Canada's production of these flour milling by-products amounted to 809,680 tons, or 54,688 tons above total production for the corresponding period a year earlier and within about 6,000 tons of the twelve-month all-time record production established in 1944-45.

Despite record production the demand by the Canadian feeder exceeds available supplies and it has been necessary during the past few years to resort to export restrictions in order to provide the Canadian farmers with the greater share of Canada's millfeed output. Exports during the eleven-month period ending June 30, 1946, amounted to a little less than 4 per cent of total production as compared with approximately 30 per cent prior to the outbreak of World War II.

According to the record of claims paid under the Freight Assistance policy, as shown on page 11 of this Review, nearly 85 per cent of the millfeeds produced in Canada during the 1945-46 period was moved into feeding areas under this scheme.

In the table which follows, the production, exports and domestic disappearance are shown by months:

### Production and Use of Millfeeds

<u>1945-46</u>	<u>Production</u>	<u>Exports</u>	<u>Domestic Disappearance</u>
	tons	tons	tons
August 1945 .....	68,104	3,716	63,696
September .....	68,403	4,272	61,824
October .....	75,259	3,551	72,406
November .....	76,768	3,255	74,349
December .....	72,425	3,397	68,857
January 1946 .....	74,088	4,018	70,824
February .....	71,118	2,742	68,094
March .....	79,318	3,313	77,949
April .....	72,795	1,242	69,950
May .....	78,154	1,601	76,920
June .....	73,248	519	69,312
Total (11 months) .	809,680	31,626	774,181

The breakdown of millfeed production during the first eleven months of the current season with comparative figures for the corresponding period in the crop year 1944-45 is as follows:

	<u>Bran</u>	<u>Shorts</u>	<u>Middlings</u>	<u>Total</u>
	tons	tons	tons	tons
<u>August-June</u>				
1944-45 (Revised) ..	311,300	295,011	148,681	754,992
1945-46 .....	347,945	322,361	139,374	809,680

## FLAXSEED

The acreage seeded to flaxseed in western Canada in 1946 totals 990,000 acres, or 4 per cent smaller than that of a year ago. At the same time, this acreage is substantially below the Dominion-Provincial recommendations of December 1945. At that time it was estimated that the construction program and the backlog of domestic protective coating requirements would absorb 6 million bushels of flaxseed, exclusive of any export business which might develop during the 1946-47 season. Since Canada has the crushing capacity to handle this volume and in view of world requirements it was recommended that at least 1,250,000 acres be planted to flaxseed in Canada, with 1,224,000 acres in the Prairie Provinces.

The following table set forth the average acreage seeded to flaxseed in the Prairie Provinces during the five-year period, 1936-40, along with seeded acreages during the years 1943 to 1946:

	<u>1936-40 Average</u>	<u>1943</u>	<u>1944</u>	<u>1945</u>	<u>1946</u>
	- acres -				
Manitoba .....	65,980	284,000	167,000	260,000	343,000
Saskatchewan ....	215,920	2,084,400	939,000	655,000	557,000
Alberta .....	25,280	550,000	191,500	119,000	90,000
Prairie Provinces	307,180	2,918,400	1,297,500	1,034,000	990,000

Although the fixed price to the producer was raised to \$3.25 per bushel, basis in store Fort William-Port Arthur, for the 1946 crop, the area devoted to this crop in the Prairie Provinces this season was the smallest since 1941 and two-thirds smaller than the record of 2,918,400 acres planted in 1943.

Deliveries during the 1945-46 crop year, together with the estimated production in the Prairie Provinces, are as follows:

	<u>Estimated Production 1944</u>	<u>Farmers' Deliveries August 1, 1944 to July 31, 1945</u>
	- 000 bushels -	
Manitoba .....	2,800	1,646
Saskatchewan .....	3,800	2,567
Alberta .....	738	561
Prairie Provinces .....	7,338	4,774

Flaxseed acreage in Manitoba increased by 32 per cent this year, but the condition figure at the end of July was only 3 points higher than it was at the same date a year ago. Offsetting this substantial acreage increase in Manitoba, are the lower acreages seeded in Saskatchewan and Alberta. In part, the decrease may be attributed to unfavourable weather at seeding time in certain areas in Saskatchewan and Alberta, where a good deal of flax is normally grown. However, condition figures at July 31 were 26 points higher in Saskatchewan and 31 points higher in Alberta than in 1945. Although no estimate of the acreage seeded in Ontario this year is as yet available, it is not expected to differ greatly from the 23,200 acres sown a year ago.

Flax deliveries during the 1946-47 season are not subject to delivery quotas and the Canadian Wheat Board remains the only marketing agent. As has been the case in the past no participation certificates will be issued.

## SOY BEANS

The acreage goal for soy beans in Canada this year was set at 49,080 acres, about 12 per cent above the 43,650 acres planted for seed purposes a year ago. Although there are no official 1946 acreage figures available at the present time, it is expected that the seeded acreage in Ontario will be much higher than in 1945. Manitoba, the only other province in Canada to grow soy beans for commercial purposes, appears to be abandoning this crop. From an area of 2,500 acres in 1943, the acreage dwindled to 200 in 1945.

The distribution of soy bean production areas follows the same pattern as in other years with Ontario, particularly the counties of Essex and Kent producing the bulk of the Canadian crop. Compared with last year Kent County shows an increase of from 40 to 50 per cent and Lambton County 100 per cent. Other counties appear to have become increasingly interested in soy beans and considerably expanded acreages are reported in Middlesex, Elgin, Norfolk and Simcoe Counties. Pelee Island, an important source of soy beans in Ontario is reported to have seeded some 6,000 acres this year and a production of 125,000 bushels is anticipated.

As a rule, some of the soy bean crop is cut for hay; last year over 17 per cent of the crop was harvested in this manner. In addition, many of the soy beans raised in Ontario are fed on the farm where they are grown and consequently they do not find their way into commercial channels.

Soy bean cake and meal, a by-product of the crushing industry, forms an important source of high-protein feedstuffs for the Canadian live-stock feeder. During the first six months of the present season well over 20 thousand tons were produced by Canadian crushers, nearly as much as was produced during the entire year of 1945.

The United States has been an important source of soy beans to supplement our domestic production. In 1945 about 1.3 million bushels were imported from that country as compared with only 0.3 million in 1944. So far this year, 0.2 million bushels have been imported. Smaller prospective high-protein feeds supplies for 1946-47 in the United States, together with a sharply reduced soy bean acreage this year would suggest that total imports from that source in 1946 may be somewhat below those of a year ago.

The ceiling price for Nos. 1 and 2 Canada grade soy beans is \$2.15 per bushel delivered at Toronto, Winnipeg, Lethbridge or Vancouver. The basis for the maximum price is determined on a soy bean moisture content of 14 per cent or less. For each increase of one per cent moisture content over 14 per cent and up to 19 per cent there is a discount of 2 1/2 cents per bushel from the ceiling price. Beyond 19 per cent moisture content there is a discount of 3 cents per bushel for each one per cent increase.

### RAPESEED

Except for a preliminary figure of 6,500 acres in Manitoba, little information concerning the 1946 acreage devoted to rapeseed in Canada is available at this time. A substantial acreage is thought to have been seeded in Saskatchewan, but acreages in Alberta are estimated to be negligible.

During the crop year 1945-46 the Canadian Wheat Board took delivery of 6.6 million pounds of rapeseed as compared with 3.5 million a year earlier and only 0.9 million in 1943-44. This seed was crushed in western Canada yielding 2 thousand tons of meal in addition to oil, which is the primary reason for its production in this country. The domestic production of more than 2 million pounds of oil in 1945-46 was nearly twice the quantity produced in 1944-45. Imports during the eleven-month period ending June 1946 amounted to only 7,200 pounds as against 1.2 million pounds in 1944-45.

The Canadian Wheat Board has again been authorized to purchase rapeseed of the 1946 crop at 6 cents per pound for seed in a reasonably clean condition with a moisture content not exceeding 10 per cent, delivered f.o.b. shipping points named by the Board. The discount on seed having a moisture content of from 10.5 per cent to 13.5 per cent is 1/4 of a cent per pound and over 13.5 per cent is 1/2 cent per pound. A schedule of discounts is also established for rapeseed containing an admixture of mustard seed and for musty and broken seed. There is no discount on seed containing less than one per cent mustard, while seed containing from 25 to 50 per cent mustard is discounted at 3 cents per pound. The Board reserves the right to refuse to accept rapeseed which contains an admixture of over 50 per cent mustard seed.

### SUNFLOWER SEED

It is estimated that Manitoba, the major sunflower producing province in Canada, seeded 25,000 acres to this crop in 1946. This compares with the total Canadian acreage of 9,212 acres in 1945. Deliveries of seed during the past crop year amounting to less than 3 million pounds as against 4.7 million pounds in 1944-45, serve to reflect the substantial reduction in production of this crop last year.

Sunflower seed produced a high quality edible oil in addition to an excellent high protein oil meal for live-stock feeding. The Fats and Oil Administrator requested that a minimum of 28,000 acres be planted to sunflower seed in 1946. On the basis of preliminary data, it would appear that this goal should be easily reached this year. During the first eleven months of the 1945-46 season about 4.2 million pounds of sunflower seed oil was imported from Argentina and compares with 24.4 million pounds imported during the twelve months of 1944-45.

## TELEGRAPHIC CROP REPORT

The following summary is quoted from the telegraphic crop report issued by the Dominion Bureau of Statistics on August 20:

While rain improved all crops in Nova Scotia the drought continues in New Brunswick. Grains are short in the straw but yields are better than anticipated. Early potatoes are yielding light but late crops are more promising. The Nova Scotia apple crop is now estimated at one and a half million barrels.

All crops show considerable improvement in Quebec following the rain in mid-August. Although the outlook was poor during July, with continued favourable weather yields are now expected to be satisfactory. Harvesting of cereals is under way in most sections and pulling of flax has commenced. With improved pastures and meadows, milk production has been maintained at a high level.

Harvesting of grain crops throughout Ontario is nearly completed and the yields are reported to be average or better. Some showers have relieved the drought but more rain is needed to prevent further deterioration. Milk production is declining as a result of extremely dry pastures. Tobacco harvesting is general in the flue-cured areas. Early apples and peaches are being marketed. In the south-west the harvesting of early tomatoes has been completed. More rain is needed to benefit potatoes and hoe crops.

Reports from Manitoba reveal that broken weather during the past week has delayed harvesting, especially threshing. Most of the crops in the southern districts have been cut and about 20 per cent threshed. In the north swathing is becoming general. Most of the wheat is expected to yield well. Early-sown oats and barley outturns are expected to be only fair, while the late-sown coarse grains appear to be poor. Rains have benefited flax, sunflowers, beets and potatoes. Outside of some hail, crop damage has been held to a minimum.

Harvesting operations in Saskatchewan are reported to be making good progress in southern and central districts, while in others they are just getting under way. From 20 to 40 per cent of the wheat has been cut, swathed or combined in the more advanced areas and the cutting of the coarse grains is progressing favourably in southern and central sections. For the province as a whole, it is estimated that 17 per cent of the wheat, 23 per cent of the oats and 34 per cent of the barley has been cut or harvested. Generally speaking, crop prospects have been maintained in most areas and good to fair yields are expected in the eastern half of the province and on the heavy soils of the west-central district. In other regions prospects are fair to poor. Sawfly infestation is serious in south-central and south-western districts and farmers are swathing the wheat crop to prevent heavy losses. Recent rains have benefited late-sown crops but have delayed cutting operations in many districts. Hail damage is reported in some areas. Live stock generally are in good condition and pastures have improved as a result of the rains.

Cooler weather prevailed over Alberta during the past week with heavy rains in the central districts and lighter showers elsewhere. Cutting is general in southern and Peace River districts and is expected to be general in the remaining districts in two weeks. Some cutting of early crops has occurred in the central and northern areas. Yields in the south-east are poor to fair and in the Peace River district outturns are fair but below average. Yield prospects elsewhere in the province are fair to good. Losses from the wheat stem sawfly have been severe in parts of southern Alberta. The pale western cutworm moth is reported in flight.

In British Columbia the weather during the past two weeks has been generally cool with scattered showers. Harvesting of fall grains is now in full swing and some oats have been cut. Spring wheat is ripening rapidly.

PRICES

Monthly Average of Closing Prices, Basis in Store Fort William-Port Arthur

	July		1945-1946		
	1944	1945	May	June	July
- cents and eighths per bushel -					
<u>OATS</u>					
No. 2 C. W. ....	51/4	51/4	51/4	51/4	51/4
No. 3 C. W. ....	51/4	51/4	51/4	51/4	51/4
No. 1 Feed .....	51/4	51/4	51/4	51/4	51/4
No. 2 Feed .....	51/4	50/6	51/4	51/4	51/4
No. 3 Feed .....	51/4	49/3	51/4	51/4	51/4
<u>BARLEY</u>					
Nos. 1 and 2 C.W. 6-Row .....	64/6	64/6	64/6	64/6	64/6
No. 3 C.W. 6-Row .....	64/6	64/6	64/6	64/6	64/6
Nos. 1 and 2 C.W. 2-Row .....	64/6	64/6	64/6	64/6	64/6
No. 1 Feed .....	64/6	64/6	64/6	64/6	64/6
No. 2 Feed .....	64/6	64/6	64/6	64/6	64/6
No. 3 Feed .....	64/6	64/6	64/6	64/6	64/6
<u>RYE</u>					
No. 2 C.W. ....	108/3	161/5	274	290/7	292/4
No. 3 C.W. ....	103/1	156/3	268	285/7	287/4
No. 4 C.W. ....	98/1	145/7	252	251/1	227
Ergoty .....	95/1	130/7	224	232/2	209
Rejected 2 C.W. ....	97/1	135/7	240	243/1	219
<u>FLAXSEED</u>					
No. 1 C.W. ....	250	275	275	275	275
No. 2 C.W. ....	246	271	271	271	271
No. 3 C.W. ....	237	262	262	262	262
No. 4 C.W. ....	233	258	258	258	258
<u>CORN</u>					
No. 3 C.W. Yellow, moisture content 20% .....	80	97/4	97/4	97/4	97/4

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The extreme scarcity of grain supplies, which has characterized the United States feed situation for the past several months, was eased somewhat when the new-crop oats, barley and wheat started to become available early in July. With prospects for seasonally large marketings of new-crop grain, the tight feed supply situation is expected to materially improve during the next few months. By October or November it is anticipated that the new-crop corn will become available in large quantities and generally speaking for the entire 1946-47 season the availability of feed grain supplies is expected to return to a more normal basis than in 1945-46.

Most encouraging supply prospects for the 1946-47 season were evident in July. At August 1, an all-time record corn crop of 3.5 billion bushels was estimated, and the second largest crop of oats, 1.5 billion bushels, was being harvested. On the other hand, barley production at 250.8 million bushels is considerably below that of a year ago and the lowest since 1937. Offsetting this larger production are smaller carry-overs of corn and barley. The combined carry-over of old-crop corn, oats and barley this year is expected to be at the comparatively low level of about 10.6 million tons, a decrease of 3.4 million tons from a year ago, and slightly less than the low level reached in 1944. Nevertheless, the indicated total supply of feed grain for 1946-47, including carry-over of old-crop grain plus new production, is the largest on record, both in total tonnage and on the basis of animals to be fed.

Total supplies of by-product feeds for the 1946-47 season are likely to be slightly smaller than in 1945-46 and the smallest in five years. However, supplies per animal units on farms may be about as large as a year ago.

After balancing increased production for some feeds concentrates against decreased production for others, it is estimated that over-all supply for the 1946-47 season, including feed grains, by-product feeds and the amounts of wheat and rye fed will be somewhat larger than the 1945-46 supply of 160 million tons. But with decreases taking place in the numbers of live stock, the 1946-47 supply per animal unit on farms may be 7 to 8 per cent larger than in 1946. Hay supplies appear ample for the number of live stock to be fed, although they are slightly smaller per animal unit than the large supplies of a year ago.

Even with prices higher than they were during the war, it is anticipated that the use of feed grain, particularly corn, for food and industrial purposes, as well as for export, is likely to be large in 1946-47. As a result of government restrictions, the use of wheat for feed probably will be considerably less than in 1945-46. The consumption of wheat as feed on farms where grown is likely to depend on the level of feed-grain prices, particularly corn, relative to the price of wheat during the coming year.

Immediately following the expiration of price controls on July 1, prices of many feeds advanced very sharply. Corn prices advanced nearly 50 per cent, while the price of oats increased 15 to 20 per cent and that of barley jumped 15 to 25 per cent. Corn futures advanced sharply—January and March futures at Chicago reaching \$1.70 at mid-July. By the first of August, however, they had declined below June ceiling price levels. Oats, too, dropped rapidly and by August 1, they were well below June ceilings on the Chicago market. This reaction can be partially attributed to favourable prospects for the corn and oats crops this year. With the higher prices prevailing, marketings of oats and barley increased somewhat more than seasonally during the first two weeks in July. Corn marketings also increased in early July, despite the small supply remaining on farms and in country elevators.

The present outlook appears to favour high prices during the current season. The continuing high requirements for live-stock feed, food, industrial purposes and export, as well as the high level of the national income are likely to result in feed prices at fairly high levels during 1946-47.