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Vol. 7

No. 2

CANADIAN COARSE GRAINS

QUARTERLY REVIEW

FEBRUARY, 1948

Published by Authority of the Rt. Hon. C.D. Howe, M.P.
Minister of Trade and Commerce
Ottawa

Price \$1 a year

CANADIAN COARSE GRAINS - QUARTERLY REVIEW

FEBRUARY 1948

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DOMINION BUREAU OF STATISTICS
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Published by Authority of the Rt. Hon. C. D. Howe, M.P.,
Minister of Trade and Commerce

Dominion Statistician: Herbert Marshall
Director, Agricultural Division: C. V. Parker
Chief, Crop Branch: W. D. Porter

THE FEED SITUATION IN CANADA

The Supply Position - Visible supplies of both oats and barley at February 19 are both in excess of the commercial supply position on the same date a year ago. Oats supplies at 30.2 million bushels exceed last year's figure by nearly a million bushels while barley stocks at 32.1 million are more than 11 million bushels greater than last year. It is also worthy of note that quantities in store at Bay and Lower Lake ports are considerably greater than was the case a year ago. Stocks of oats and barley located at Eastern Lake ports were reported on February 19 this year at 7.8 and 5.3 million bushels respectively. Last year only 3.4 million bushels of oats and 1.1 million bushels of barley were at Eastern Lake ports. Lakehead stocks of barley at 11.5 million bushels are also up 6 million bushels while Lakehead oats stocks at 9.5 million bushels are nearly a million bushels greater than a year ago.

Marketings of oats in the Prairie Provinces during the period August 1 to February 19 of the current crop year were down only 2.5 million bushels from the comparable figure for 1946-47 while barley marketings increased nearly 10 million bushels over deliveries recorded for the same period in 1946-47. From August 1 to February 19 this year deliveries of rye and flaxseed were roughly double the marketings of these grains during the same period of the previous crop year. While the 1947 oats and barley crops were both smaller than in 1946, marketing of the 1947 crop has been facilitated by the early removal of delivery quotas. Due largely to the reduced 1947 wheat crop, the Wheat Board was able to declare an open quota on the delivery of all grains as early as October 14, 1947. The increase in oats and barley prices subsequent to the removal of ceilings has also been a factor in maintaining the flow of deliveries from western farms. The heavier deliveries of flaxseed and rye reflect directly the increased production of these crops in 1947 as well as the high prices prevailing for these grains. In addition to western oats and barley already marketed it is estimated that some 23 million bushels of oats and 14 million bushels of barley remain on western farms to be marketed before the close of the crop year.

While the statistical position as outlined in the November issue of this publication indicated that the net supply of feed grain per grain consuming animal unit was the lowest since 1941-42, several factors have operated to prevent the development of an acute feed shortage. Fall weather was favourable to late pasture feeding in many areas of the country, thus taking some of the pressure off grain supplies. Despite the reduced crop in western Canada, preliminary data on freight assistance shipments indicate that during the first five months of the current crop year approximately 50 million bushels of wheat, oats and barley had moved into Canadian feed deficit areas. This amount compares favourably with the 52.7 million bushels moved during the same period of the 1946-47 crop year. Moreover, hay and clover crops in 1947 were generally excellent and good quantities of fodder have been available as a partial substitute for grain rations in most areas where a shortage of the latter has threatened. Finally, the almost complete embargo on exports of oats, barley and millfeeds has served to retain practically all indigenous supplies of these feedstuffs for domestic use.

In spite of the favourable effect exerted on feed supplies by the factors just outlined, sharply increased marketings of live stock, particularly hogs, evidently reflect the desire of farmers to adjust their live-stock enterprises to a somewhat tight feed grain situation. Also, buyer resistance on the part of feeders to higher grain prices is a factor which cannot be left out of consideration. While official data on December live-stock numbers have not yet been released, evidence available does indicate a reduction in hog numbers on prairie farms. Such a trend would, of course, be a natural concomitant of the relatively high marketings of coarse grains by prairie farmers. However, the February decline in grain prices, together with the January increase in live-stock prices, should offset, at least in part, any general tendency toward liquidation of live-stock holdings which may have developed subsequent to the removal of ceilings on feed grains last fall.

The situation with reference to protein feeds has evidently eased somewhat. The outturn of fishmeal on the West Coast has been much better than anticipated and deliveries of soy beans from Ontario farms have also been greater than looked for. Some other protein feeds may be in better supply than during 1947. Prices of protein feeds increased sharply after the removal of ceilings and buyer resistance was not slow to develop. In recent weeks prices have dropped toward lower levels and buyers are showing rather more interest. Output of millfeeds for the first six months of the current crop year has amounted to 466,240 tons as compared with 483,111 tons during the same period a year ago. However, with mills now operating at reduced capacity it is to be expected that production for the remaining six months of the crop year will lag further behind last year's outturn. Higher prices for millfeeds have induced buyer resistance to these feeds and supplies appear to be sufficient to take care of quantities currently demanded at present prices.

Prices - The current support prices of oats and barley are to be extended to July 31, 1949. Prevailing support levels for these grains are 61 1/2 cents per bushel for No. 1 feed oats and 90 cents per bushel for No. 1 feed barley, both basis in store Fort William-Port Arthur. Other grades are at appropriate differentials to be fixed from time to time by the Wheat Board. A final payment of 50 cents per bushel is to be made to producers who have delivered or will deliver commercial flaxseed to dealers acting as agents of the Wheat Board during the crop year 1947-48. This payment represents a distribution of profits made from export sales of flaxseed and oil and brings the total price of flaxseed delivered during 1947-48 to \$5.50 per bushel, basis the top grade of both eastern and western flaxseed at Montreal and Fort William-Port Arthur respectively.

Proposed Amendment to Canadian Wheat Board Act - On February 27 the House went into committee to consider a resolution as to the presenting of a bill to amend the Wheat Board Act. Among other things, the resolution contains a provision to empower the Governor-in-Council, by regulation, to extend to oats and barley the (marketing) regulations now applicable to wheat. The debate has not yet passed beyond the resolution stage.

Revised Estimate of Value and Production of Field Crops - Only slight changes in the 1947 crop production figures were indicated in the latest (Feb. 24) Bureau of Statistics crop estimate. Oats production in 1947 for all Canada is now placed at 278.7 million bushels with a gross farm value of 189.5 million dollars. The barley outturn is placed at 141.4 million bushels valued at 125.4 million dollars. The rye crop of 13.2 million bushels is valued at 42.3 million dollars, while the flax crop of 12.2 million bushels had a gross value of 63.9 million dollars.

Farmers' Marketings - Marketings of oats in the Prairie Provinces during the period August 1 to February 12 of the current season were down some 2 million bushels from the comparable figure for the previous crop year. Barley marketings, however, increased nearly ten million bushels over deliveries recorded for the same period in 1946-47. From August 1, 1947 to February 12 this year deliveries of rye and flaxseed were approximately double the marketings of these grains between the same dates in 1946-47.

While the 1947 oats and barley crops were both smaller than in 1946, marketing of the 1947 crop has been facilitated by the early removal of delivery quotas. Due largely to the reduced 1947 wheat crop, the Wheat Board was able to declare an open quota on the delivery of all grains as early as October 14, 1947. The increase in oats and barley prices subsequent to the removal of ceilings on October 22, has also been a factor in maintaining the flow of deliveries. Heavier deliveries of rye and flaxseed reflect directly the sharply increased production of these crops in 1947 as well as the high prices prevailing for these grains.

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, 1947 to February 12, 1948

	O A T S		B A R L E Y	
	Bushels	% 1947 Crop	Bushels	% 1947 Crop
Manitoba	9,356,484	24.0	14,707,302	43.3
Saskatchewan	27,836,520	34.8	22,685,357	50.4
Alberta	20,350,388	27.1	19,084,353	36.7
T o t a l	57,543,392	29.7	56,477,012	43.1
Same Period in 1946-47	59,441,812	24.1	46,679,512	34.8

	R Y E		F L A X S E E D	
	Bushels	% 1947 Crop	Bushels	% 1947 Crop
Manitoba	1,232,366	205.4 ^{1/}	3,958,686	76.1
Saskatchewan	5,288,962	78.0	3,611,751	86.0
Alberta	2,952,296	69.5	1,671,036	77.7
T o t a l	9,473,624	81.4	9,241,473	80.0
Same Period in 1946-47	4,654,280	63.9	4,779,782	77.0

^{1/} The excess of deliveries over production is accounted for by inclusion in the deliveries figures of substantial quantities of rye imported from the United States last fall.

PRODUCTION AND MARKETINGS ^{1/} IN THE PRAIRIE PROVINCES

Harvest Year	Seeded 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>							
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	144,046,208	29.2
1944	10,446,900	35.5	370,800,000	61,830,000	432,630,000	135,964,571	31.4
1945	10,749,000	25.4	273,500,000	54,500,000	328,000,000	107,359,887	32.7
1946	8,522,000	29.0	247,000,000	40,902,000	287,902,000	101,234,058	35.2
5-year average	10,234,680	35.0	356,660,000	54,236,800	410,896,800	121,869,159	29.7
1947	7,898,000	24.6	194,000,000	39,812,000	233,812,000	57,543,392 ^{4/}	24.6
<u>BARLEY</u>							
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	85,234,231	34.9
1944	6,763,400	26.4	178,400,000	22,825,000	201,225,000	76,627,540	38.1
1945	6,859,000	21.0	144,000,000	17,000,000	161,000,000	67,255,294	41.8
1946	5,797,000	23.1	134,000,000	13,250,000	147,250,000	69,105,904	46.9
5-year average	6,745,880	26.8	180,280,000	19,453,800	199,733,800	76,816,325	38.5
1947	7,035,000	18.6	131,000,000	15,453,000	146,453,000	56,477,012 ^{4/}	38.6
<u>RYE</u>							
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	4,692,981	39.5
1944	572,550	12.4	7,109,000	1,000,000	8,109,000	4,087,348	50.4
1945	410,000	10.9	4,476,000	465,000	4,941,000	3,096,064	62.7
1946	641,000	11.4	7,278,000	215,400	7,493,400	5,556,483	74.2
5-year average	673,530	13.0	9,546,600	1,565,080	11,111,680	5,459,242	49.1
1947	1,072,000	10.8	11,630,000	212,000	11,842,000	9,473,624 ^{4/5/}	80.0
<u>FLAXSEED</u>							
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	14,409,711	80.1
1944	1,297,500	7.2	9,405,000	814,000	10,219,000	7,172,674	70.2
1945	1,034,000	7.1	7,338,000	750,000	8,088,000	4,732,762	58.5
1946	821,000	7.6	6,208,000	635,000	6,843,000	4,839,112	70.7
5-year average	1,507,380	7.6	11,050,200	520,600	11,570,800	8,509,633	73.5
1947	1,513,000	7.6	11,550,000	436,000	11,986,000	9,241,473 ^{4/}	77.1

^{1/} Includes Peace River Block in British Columbia.

^{2/} Stocks at end of July.

^{3/} August 1 to July 31, 1942-43 to 1946-47.

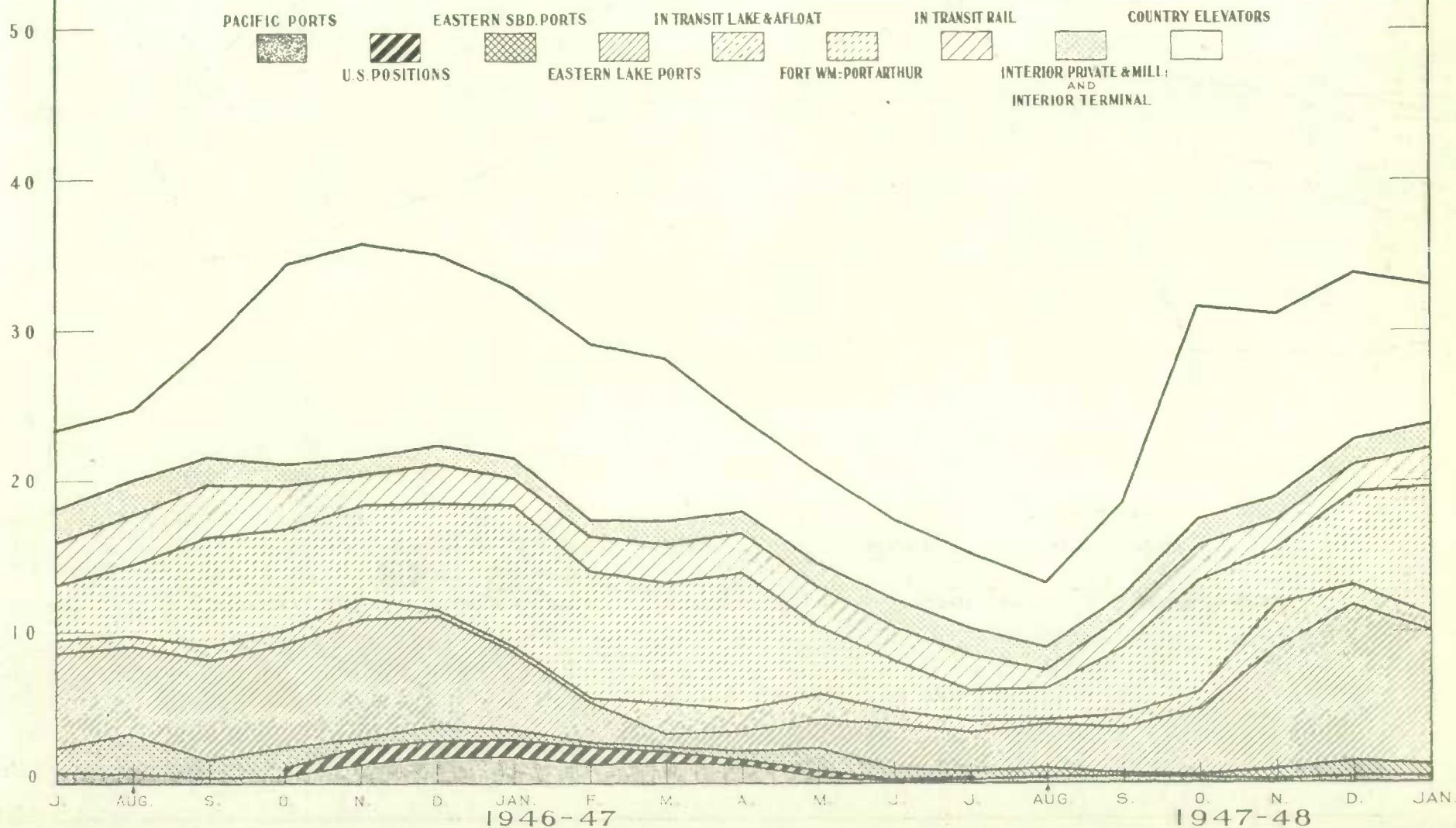
^{4/} August 1, 1947 to February 12, 1948.

^{5/} Includes some Rye imported from U.S.A.

MILLION
BUSHELS

MONTHLY VISIBLE SUPPLY OF CANADIAN OATS BY POSITIONS

CROP YEARS 1946-47, 1947-48



1947-48

LAKE AND RAIL MOVEMENT OF GRAIN FROM FORT WILLIAM-FORT ARTHUR

Lake Shipments - Movement of Canadian grain down the Lakes during the 1947 navigation season exceeded the 1946 movement by about 16 million bushels. Out of 256.4 million bushels moved during the 1947 navigation season 144.2 million bushels were shipped since August 1, the beginning of the new crop year.

Shipments between Opening and Closing of Navigation

Year	Wheat	Oats	Barley	Rye	Flaxseed	Total
- bushels -						
1938	132,230,539	8,812,016	16,623,538	1,477,134	608,919	159,752,146
1939	209,780,420	18,535,455	18,434,141	4,660,217	478,387	251,888,620
1940	174,690,549	16,825,500	10,021,209	3,311,433	1,239,213	206,087,904
1941	232,946,021	9,045,957	11,602,419	6,092,230	2,336,705	262,023,332
1942	178,510,838	17,045,934	10,554,118	1,029,639	4,039,688	211,180,217
1943	246,159,195	39,406,374	44,034,103	5,439,156	8,875,748	343,914,576
1944	304,248,479	80,008,997	56,343,534	8,156,013	7,205,043	455,962,066
1945	344,092,226	84,927,448	45,179,553	4,827,669	4,384,058	483,410,954
1946	147,431,373	56,006,383	30,777,084	3,770,656	2,184,421	240,169,917
1947	167,333,848	46,859,717	29,827,375	9,908,684	2,465,342	256,394,966

August 1 to Closing of Navigation

1946	98,184,285	27,592,564	21,046,090	3,074,506	1,312,278	151,209,723
1947	89,443,911	24,483,218	19,611,353	8,247,108	2,437,633	144,223,223

Rail Shipments - Heavier shipments in January have brought this crop year's rail movement from the Lakehead within fairly close range of the quantities shipped during the August-January period of the 1946-47 crop year.

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

	Wheat	Oats	Barley	Rye
- bushels -				
<u>1947-48</u>				
August	90,574	312,054	50,232	7,500
September	91,366	335,827	105,321	6,000
October	131,290	509,906	152,056	178
November	100,562	193,888	78,016	-
December	691,223	839,315	625,996	222,806
January	3,143,984	1,827,567	904,253	617,911
T o t a l	4,248,999	4,018,557	1,915,874	854,395
<u>1946-47</u>				
August	187,825	578,708	215,598	1,500
September	175,773	724,439	406,947	3,500
October	255,754	605,548	260,834	3,000
November	256,249	375,734	103,740	1,500
December	1,601,883	916,402	282,250	118,812
January	2,462,002	1,326,096	1,159,905	383,622
T o t a l	4,939,486	4,526,927	2,429,274	411,934

Freight Assistance Shipments - Incomplete returns of claims for payment under the Freight Assistance Policy indicate that during the first five months of the current crop year nearly 50 million bushels of wheat, oats and barley moved into Canadian feed deficit areas. This amount compares with a figure of 52.7 million bushels for the corresponding period of 1946-47. Compared with 1946-47 it is noted that movements of wheat and barley were less in 1947, while shipments of oats were slightly greater. Filing of late claims for the current period covered will necessitate upward revisions in the shipments recorded below for the last five months of 1947.

Millfeed shipments under the Freight Assistance Plan are down significantly, thus reflecting the drop in flour production consequent upon the reduced 1947 wheat crop.

The following tables contain the distribution of shipments for the first five months of 1947-48 and the crop year 1946-47:

August 1, 1947 to December 31, 1947

	Wheat	Oats	Barley	Screen-ings	Mill-feeds
	bu.	bu.	bu.	tons	tons
<u>1947-48</u>					
Ontario	4,304,074	11,266,971	6,731,058	12,477	110,044
Quebec	3,237,735	8,842,471	7,308,650	7,105	123,889
New Brunswick	335,788	984,185	679,990	859	20,428
Nova Scotia	351,931	956,112	682,004	472	19,732
Prince Edward Island ..	115,746	136,765	201,502	98	5,053
British Columbia	1,403,052	1,376,505	585,500	927	26,229
Total (5 months)	9,748,326	23,563,009	16,188,704	21,938	305,375
Revised 5 months 1946 .	10,644,713	23,199,117	18,816,478	36,144	364,272

August 1, 1946 to July 31, 1947

<u>1946-47</u>					
Ontario	10,555,923	33,712,385	15,599,542	33,920	311,815
Quebec	7,989,900	22,749,782	17,963,963	26,802	342,795
New Brunswick	847,370	2,936,429	1,738,658	3,747	61,218
Nova Scotia	981,560	3,004,171	1,894,096	2,333	60,862
Prince Edward Island ..	456,787	699,744	604,777	583	17,168
British Columbia	4,633,438	4,602,853	1,661,896	3,191	77,797
Total (12 months)	25,464,978	67,705,364	39,462,932	70,576	871,655

Shipments to the United States - Shipments of grain to the United States for the period August 1 to February 12, totalled 16.9 million bushels as compared with 23.3 million bushels shipped during the corresponding period of the previous crop year. Over 15 million bushels of the movement during the current crop year consists of wheat, most of which has been shipped to Buffalo for re-export. Movements of oats and barley are very light due to the close restrictions on exports of these grains. About 1.2 million bushels of rye have been moved from Eastern Elevators into the United States. Only 1,522 bushels of flaxseed moved into the United States during the period in question.

The following table shows the shipments of the various grains and the areas from which they have been made during the 28 weeks ending February 12, 1948:

	Pacific Coast Terminals	Western Elevators	Fort William- Port Arthur	Eastern Elevators	Total
- bushels -					
Wheat	-	52,986	15,429,812	-	15,482,798
Oats	121,646	15,799	-	-	137,445
Barley	-	2,961	-	-	2,961
Rye	-	-	60,094	1,237,169	1,297,263
Flaxseed	-	1,522	-	-	1,522
T o t a l	121,646	73,268	15,489,906	1,237,169	16,921,929
Same Period 1946-47.	641,643	548,116	21,882,006	181,659	23,253,424

Grading of Crops 1947-48 - A high proportion of tough grades has made the 1947 western grain crop rather difficult to handle due to the large amount of drying required. The flax crop, however, has graded up well and protein content of the barley crop is good.

The following tabulation shows the grading of coarse grain and flaxseed inspected by the Board of Grain Commissioners between August 1 and February 14, 1948. Some old crop grain is included in these inspection returns but the bulk of cars contained grain grown in western Canada in 1947.

OATS	Cars	BARLEY	Cars
2 C.W.	218	1 & 2 C.W. 6-Row	500
Ex. 3 C.W.	503	3 C.W. 6-Row	1,620
3 C.W.	4,295	2 C.W. 2-Row	96
1 Feed	6,524	2 & 3 C.W. Yellow	276
2 Feed	1,525	1 Feed	4,012
3 Feed	251	2 Feed	4,929
Mixed Feed	49	3 Feed	1,391
Tough	6,758	Tough	10,664
All Others	1,218	All Others	1,282
Total Cars	21,341	Total Cars	24,770
Bushel Equivalent	49,031,201	Bushel Equivalent	45,573,085
<u>RYE</u>		<u>FLAXSEED</u>	
1 & 2 C.W.	2,870	1 C.W.	4,555
3 C.W.	1,583	2 C.W.	166
4 C.W.	97	3 C.W.	109
Tough	1,132	Tough	652
All Others	89	All Others	62
Total Cars	5,571	Total Cars	5,544
Bushel Equivalent	9,028,195	Bushel Equivalent	7,259,535

Exports of Canadian Coarse Grains - The following statistics on monthly overseas clearances have been compiled by the Statistics Branch of the Board of Grain Commissioners:-

Overseas Clearances of Oats, Rolled Oats and Oatmeal (including U.S.A. Imports)
for the Six-Month Period August 1947 to January 1948

	January		December		August-January	
	Rolled Oats ^{1/} and Oatmeal	Oats ^{2/}	Rolled Oats ^{1/} and Oatmeal	Oats ^{2/}	Rolled Oats ^{1/} and Oatmeal	Oats ^{2/}
BRITISH EMPIRE	- bushels -		- bushels -		- bushels -	
United Kingdom	74,049	-	141,030	-	998,528	-
Eire	-	-	-	-	4,921	-
<u>Africa</u>						
Br. E. Africa	-	-	-	-	273	-
Br. S. Africa	2,400	-	654	-	11,061	-
Br. W. Africa	315	-	-	-	526	-
Rhodesia	-	-	-	-	17,175	-
<u>Asia</u>						
Ceylon	-	-	133	-	1,503	-
Hong Kong	9,273	-	16,630	-	40,904	-
India	4,976	-	-	-	60,091	-
Malaya	5,539	-	-	-	6,624	-
Pakistan	745	-	-	-	745	-
Palestine	-	-	-	-	6,964	-
<u>Europe</u>						
Malta	-	-	-	-	1,272	-
<u>North America</u>						
Bahamas	388	-	-	-	582	1,997
Barbados	7,406	-	436	-	14,120	-
Bermuda	945	-	1,867	-	5,722	-
British Honduras	-	-	-	-	36	-
Jamaica	-	-	6,085	-	23,085	-
Trinidad-Tobago	-	-	-	-	6,140	-
Other Br. W. Indies .	3,133	-	2,527	-	15,303	-
Newfoundland	2,776	-	7,394	-	41,661	40,771
<u>South America</u>						
Br. Guiana	158	-	109	-	4,322	-
TOTAL BRITISH EMPIRE ..	112,103	-	176,865	-	1,261,558	42,768
FOREIGN COUNTRIES						
<u>Africa</u>						
Egypt	-	-	-	-	393	-
Portuguese Africa ...	-	-	-	-	254	-
<u>Asia</u>						
Burma	-	-	788	-	788	-
China	-	-	-	-	1,066	-
Iraq-Iran	-	-	-	-	109	-
Netherlands E.Indies.	8,182	-	-	-	8,182	-
Philippine Islands ..	-	-	539	-	539	-
Portuguese Asia	-	-	-	-	552	-
Siam	-	-	-	-	181	-

Overseas Clearances of Oats, Rolled Oats and Oatmeal (including U.S.A. Imports)
for the Six-Month Period August 1947 to January 1948 - concluded

	January		December		August-January	
	Rolled Oats <u>1/</u> and Oatmeal	Oats <u>2/</u>	Rolled Oats <u>1/</u> and Oatmeal	Oats <u>2/</u>	Rolled Oats <u>1/</u> and Oatmeal	Oats <u>2/</u>
	- bushels -		- bushels -		- bushels -	
<u>FOREIGN COUNTRIES (con.)</u>						
<u>Europe</u>						
Belgium	71,515	-	35,437	-	399,225	896,506
Iceland	37,976	-	38,758	-	101,054	-
Italy	-	-	-	-	129,176	-
Netherlands	-	-	-	-	-	8,904
Portugal	-	-	1,891	-	2,358	-
Switzerland	4,230	-	-	-	25,733	-
<u>North America</u>						
Costa Rica	-	-	358	-	358	-
Dominican Republic ...	-	-	1,515	-	3,364	-
Guatemala	545	-	545	-	2,314	-
Salvador	-	-	-	-	1,515	-
St.Pierre & Miquelon .	109	-	-	-	261	-
United States for home consumption <u>3/</u>	-	<u>4/</u>	-	<u>4/</u>	-	64,488
<u>South America</u>						
Brazil	3,158	-	812	-	15,952	-
Colombia	-	-	10,449	-	23,401	-
Ecuador	-	-	709	-	3,048	-
Netherlands Guiana ...	-	-	-	-	4,036	-
Peru	-	-	-	-	19,915	-
Venezuela	17,406	-	38,455	-	139,703	-
TOTAL FOREIGN COUNTRIES.	143,121	-	120,256	-	883,477	969,898
<hr/>						
GRAND TOTAL EXPORTED ...	255,224	-	297,121	-	2,145,035	1,012,666

^{1/} Canadian Customs Returns - Conversion Rate - 1 Bushel Oats = 16.5 pounds of rolled oats or oatmeal.

^{2/} Subject to revision.

^{3/} Source - United States Department of Commerce - Bureau of the Census.

^{4/} United States imports not available.

Overseas Clearances of Barley, Rye and Flaxseed (Including U.S.A. Imports)
for the Six-Month Period August 1947 to January 1948

	January ^{1/}	December ^{1/}	August-January ^{1/}
	bu.	bu.	bu.
<u>BARLEY</u>			
<u>FOREIGN COUNTRIES</u>			
<u>Europe</u>			
France ^{2/}	-	4,988	4,988
<u>North America</u>			
United States for home consumption ^{3/}	<u>4/</u>	<u>4/</u>	28,367
GRAND TOTAL EXPORTED	-	4,988	33,355

<u>RYE</u>			
<u>FOREIGN COUNTRIES</u>			
<u>Europe</u>			
Belgium	160,000	29,040	2,256,472
Czechoslovakia	164,000	236,000	400,000
Denmark	-	20,000 ^{2/}	361,478 ^{2/}
France	734,386	497,000	3,060,316 ^{5/}
Iceland	-	-	7,733
Italy	183,625	478,149 ^{2/}	2,646,500 ^{2/}
Netherlands	-	19,636 ^{2/}	19,636 ^{2/}
Norway	-	-	80,000
Switzerland	-	-	230,000 ^{2/}
<u>North America</u>			
United States for home consumption ^{3/}	<u>4/</u>	<u>4/</u>	41,460
GRAND TOTAL EXPORTED	1,242,011	1,279,825	9,103,595

<u>FLAXSEED</u>			
<u>FOREIGN COUNTRIES</u>			
<u>Europe</u>			
Norway	9,622	344,000	353,622
GRAND TOTAL EXPORTED	9,622	344,000	353,622

^{1/} Subject to revision.

^{2/} Original loading advice revised from an authoritative source.

^{3/} Source - United States Department of Commerce - Bureau of the Census.

^{4/} United States imports not available.

^{5/} Revised to include 1,127,462 bushels admitted in November.

QUALITY OF WESTERN CANADIAN BARLEY - 1947 CROP

Malting Quality -

Comparison between grades of this year's barley shows that 2 C.W. Six-row is better by a small but consistent margin than the 3 C.W. Six-row, barley nitrogen being the only factor which is roughly equal. Yellow grades, when compared with the Six-row grades, are higher in nitrogen and lower in extract, but have adequate enzymatic activity. However, the enzymatic activity, when considered in the light of the high barley nitrogen, is actually inferior. Of the two Yellow grades, 2 C.W. is better than 3 C.W. in barley and malt properties. No. 1 Feed is slightly poorer this year than last; but this grade is quite satisfactory in malting quality on the basis of general consideration.

Sampling -

The protein survey of the 1947 crop of barley was made by determining the protein content on samples of Six-row, Yellow, and 1 Feed grades, obtained from carlots of barley inspected in the Western Division, but this year because fewer cars of malting grades and 1 Feed came forward, 320 extra samples were collected from country elevators and inspection points.

More detailed additional information on all the barley inspected during the first quarter in the Western Grain Inspection Division was obtained by making protein determinations on semi-monthly samples representing each grade of barley inspected at each of the Inspection Offices. Analysis of samples representing inspections in the Western Division shows that the average protein content for all grades of barley, both malting and feeding, is 12.3 per cent. This value is 0.7 per cent higher than the value for 1946 taken over a comparable period. The protein content of every grade, with the exception of 2 C.W. Yellow, is higher this year than last.



The map presented here shows the geographic distribution of the survey samples of different protein levels. The different types of hatching are used to designate areas of average protein (11.0-12.9 per cent), above average protein (over 12.9 per cent), and below average protein. The zones represent the average range in the areas, but within each zone samples occur whose protein levels fall outside the protein range indicated by the hatching.

Malting grades of barley form only a small portion of the total barley marketed. This is the third year of relative scarcity of malting grades, and the cause this year is the comparatively poor quality of the crop. Because of the scarcity of Six-row and Yellow barley the better carlots of 1 Feed may have to be selected and cleaned for malting.

The above information on barley quality was obtained from Crop Bulletin No. 27 "The Quality of Western Canadian Barley" by J. A. Anderson and K. Hlynka, published by the Grain Research Laboratory of the Board of Grain Commissioners for Canada. More detailed information on malting quality and the protein survey conducted by this Laboratory may be found in the above-mentioned publication.

QUALITY OF WESTERN CANADIAN FLAX - 1947 CROP

The following information was obtained from Crop Bulletin No. 28 "The Quality of Western Canadian Flax" by J. A. Anderson and I. Levi, published by the Grain Research Laboratory of the Board of Grain Commissioners for Canada.

Quality of Inspection Office Averages - Analyses of representative samples of different grades of the 1947 crop of Western Canadian flax give the following mean quality values: oil content, 41.4 per cent; iodine value 183.8 Wijs' units; and protein content of the oil-free meal, 46.2 per cent. The data were obtained from the study of samples representing 3022 carlots of grades 1 C.W. to 4 C.W. inspected at four offices in the Western Division during the first three months of the 1947-48 crop year. Corresponding data for flax inspections during the whole of the 1946-47 crop year were: oil content, 42.3 per cent; iodine value, 186.7 Wijs' units; and protein content of oil-free meal, 42.3 per cent. Comparison of the data for the two crops indicate that the new crop will be lower in oil content by about 1 per cent; lower in iodine value by about 4 units; and higher in protein content by about 4 per cent.



Flax Quality Survey - A survey of 400 individual samples was also made to obtain additional information on variations in the quality of the new crop. The samples were obtained from 82 stations in Manitoba, from 128 stations in Saskatchewan, and from 28 stations in Alberta. So far as possible, the collection of samples was made on the basis of production by crop districts. As the majority of the samples (89 per cent) graded 1 C.W., differences between grades are relatively unimportant.

Comparison of mean values for provinces shows that Manitoba is highest and the other two provinces are the same for oil content; that Alberta is highest and Manitoba is lowest for iodine value; and that Saskatchewan is highest and the other two provinces are the same for protein content. Mean values for Western Canada, of 40.7 per cent for oil content and 180.9 Wijs' units for iodine value, are the lowest obtained by the laboratory in annual surveys during the past fourteen years.

Map - The map reproduced above shows the distribution of samples of different oil contents. It shows that most of the areas in Alberta, slightly more than one-half of the areas in Saskatchewan, and more than one-third of the areas in Manitoba, produced flax of below average oil content. The remaining areas produced flax of medium oil content.

More detailed information may be obtained by consulting the above-mentioned publication

HOG-BARLEY RATIO

After remaining unchanged since April, the hog-barley ratio rose one and one-half points in September reflecting the increase in hog prices which occurred in that month. With the lifting of price-ceilings on barley, however, on October 22, the ratio dropped sharply and in December stood at 13.9, the lowest point since May 1937. Increased hog prices, resulting from the higher prices announced under the new British contract in January, brought the ratio up to 17.1 for that month.

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 1943 to January 1948:

(Long-time Average = 17.2)

	1943 <u>1/</u>	1944 <u>2/</u>	1945 <u>2/</u>	1946 <u>2/</u>	1947	1948
January	21.4	18.1	18.3	17.1	20.7 <u>2/3/</u>	17.1 <u>5/</u>
February	21.4	18.1	18.3	17.3	21.4 <u>2/</u>	
March	22.0	18.2	18.3	17.1	19.7 <u>4/</u>	
April	22.0	18.2	18.4	18.3 <u>3/</u>	18.1 <u>5/</u>	
May	21.9	18.2	18.5	18.3 <u>3/</u>	18.1 <u>5/</u>	
June	21.2	18.3	19.0	18.4 <u>3/</u>	18.1 <u>5/</u>	
July	20.5	18.3	19.1	18.4 <u>3/</u>	18.1 <u>5/</u>	
August	20.4	18.3	18.0	20.3 <u>3/</u>	18.1 <u>5/</u>	
September ...	20.3	18.3	18.2	21.0 <u>3/</u>	19.6 <u>5/</u>	
October	20.2	18.3	17.2	19.6 <u>3/</u>	17.8 <u>5/</u>	
November	20.8	18.3	17.0	19.5 <u>3/</u>	14.4 <u>5/</u>	
December	21.1	18.3	17.0	19.5 <u>3/</u>	13.9 <u>5/</u>	

1/ If the advance Equalization payment of 15 cents per bushel were 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 Advance Equalization payment on barley and Subsidy on hogs.

3/ Revised. Commencing April 1, the subsidy paid on hogs was reduced from \$3.00 to \$2.00 for Grade A and from \$2.00 to \$1.00 for Grade B-1.

4/ Includes Subsidy on hogs and Advance Equalization payment on barley to March 17, 1947. At that date barley advance equalization payment discontinued.

5/ Includes Subsidy on hogs.

FEED AND LIVE-STOCK INDICES

Up to January 1948, the feed index had risen 48 points from July 1947, due chiefly to the removal of price ceilings on the more important components of the index. The 'animal' index has risen 21.7 points since July as a result of price increases in live stock, milk, eggs, wool and hides.

Index Numbers of Feed Prices and Prices of Live Stock and Live-Stock Products
by Months, 1945-1948 (1926 = 100)

	1945		1946		1947		1948	
	Feed <u>1/</u>	Animal	Feed	Animal	Feed	Animal	Feed	Animal
January ...	115.5	122.7	108.3	125.0	110.5	138.3	172.6	164.4
February ..	117.3	122.7	108.3	126.0	112.9	140.1		
March	118.3	123.6	105.7	126.1	118.8	141.0		
April	113.6	124.2	104.6	126.5	122.2	142.4		
May	113.0	121.1	105.4	127.7	122.7	143.4		
June	113.7	122.4	104.8	130.5	123.1	144.4		
July	114.2	122.3	102.8	130.6	124.6 <u>1/</u>	142.7		
August	109.3	121.4	103.4	129.3	130.0 <u>1/</u>	142.8		
September .	108.5	119.5	105.1	129.2	138.7 <u>1/</u>	142.2		
October ...	107.0	124.8	108.7	135.8	152.2 <u>1/</u>	145.2		
November ..	106.9	125.5	109.6	137.1	166.4 <u>1/</u>	147.5		
December ..	108.3	125.4	110.7	137.0	168.2	156.8		

1/ Revised.

Millfeed Production in Canada - Mills operating at near capacity during August, September and October and at somewhat lower capacity since then turned out 466,240 tons of millfeeds, falling short of last year's record breaking production during the corresponding period by only 16,871 tons. Reduced operations were to be expected because of the smaller wheat crop but production still continues at relatively high levels. In November 1946 a new record production was achieved with 85,495 tons. A further record was established at 88,853 tons in May of 1947, only to be surpassed in October of the same year with an outturn of 88,947 tons.

Exports of millfeeds continue to be severely restricted and exports so far for the current crop year have been somewhat smaller than those for the corresponding period of 1946-47. These restrictions have been instrumental in assuring Canadian feeders the major portion of Canadian production.

Prices quoted by the larger firms in mid-February were Bran \$46.25, Shorts \$49.25 and Middlings \$51.25, all per ton for carlots f.o.b. Montreal and Toronto. These prices are \$11. to \$13. higher than those quoted in mid-November. Prices quoted do not include the freight assistance subsidy.

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

Production and Use of Millfeeds

<u>1947-48</u>	<u>Production</u>	<u>Exports</u>	<u>Domestic Disappearance</u>
	tons	tons	tons
August	85,648	1,077	80,651
September	87,393	1,919	83,878
October	88,947	2,468	90,973
November	76,527	2,183	78,658
December	59,951	2,868	57,071
January	67,774	2,653	70,092 ^{1/}
Total (6 months).	466,240	13,168	461,333

^{1/} Millfeed imports were not available at the time of the compilation of January domestic disappearance figures.

The breakdown of millfeed production during the first six months of the current season with comparative figures for the corresponding period in the crop year 1946-47 is as follows:

	<u>Bran</u>	<u>Shorts</u>	<u>Middlings</u>	<u>Total</u>
	tons	tons	tons	tons
<u>August-January</u>				
1946-47 (Revised)	212,534	193,529	77,048	483,111
1947-48	200,502	186,812	78,926	466,240

SHELLED CORN

The Canadian shelled corn crop estimated at 6,682,000 bushels in the latest estimate of Canada's 1947 field crops is nearly 4 million bushels smaller than the 10,661,000 bushel crop of 1946. Reduced acreages and yields in the province of Ontario were principally responsible for the sharp drop in production in 1947.

The following table sets forth comparisons between acreage, yield and production in 1946 and 1947:

	Acreage		Yield Per Acre		Production	
	1946	1947	1946	1947	1946	1947
	acres		bushels		bushels	
Ontario	240,000	165,700	43.3	38.8	10,392,000	6,430,000
Manitoba	11,700	10,500	23.0	24.0	269,000	252,000
T o t a l ...	251,700	176,200	42.4	37.9	10,661,000	6,682,000

With the exception of 252,000 bushels produced in Manitoba, all of Canada's 1947 corn crop was produced in Ontario. As in other years, the production of shelled corn in Ontario was obtained, for the most part, from the south-western section of the province.

Grading of the 1947 Ontario Corn Crop - The following data on corn inspected up to January 31, are indicative of the grade and moisture content of the 1947 crop of eastern corn.

Inspections of Canadian Eastern Corn, August 1, 1947 to January 31, 1948

<u>Yellow Corn</u>	<u>Bushels</u>	<u>Yellow Corn</u>	<u>Bushels</u>
1 C. E.	165,508	Moist 2 C. E.	647,907
2 C. E.	228,953	Moist 3 C. E.	177,079
3 C. E.	120,073	Moist 4 C. E.	24,872
4 C. E.	22,923	Moist 5 C. E.	1,270
5 C. E.	13,312	Moist 2 C. E. Flint and Dent .	1,726
Tough 1 C. E.	13,535	Wet 1 C. E.	3,420
Tough 2 C. E.	50,213	Wet 2 C. E.	42,120
Tough 3 C. E.	40,970	Wet 3 C. E.	40,184
Tough 4 C. E.	11,450	Wet 4 C. E.	11,705
Tough 5 C. E.	6,270	Wet 5 C. E.	8,888
Damp 1 C. E.	24,863	Ex. Dry 1 C. E.	19,730
Damp 2 C. E.	47,623	Ex. Dry 2 C. E.	51,119
Damp 3 C. E.	14,928	Ex. Dry 3 C. E.	25,460
Damp 4 C. E.	4,115	Ex. Dry 4 C. E.	2,940
Moist 1 C. E.	194,185	Ex. Dry 5 C. E.	3,020

Inspections of Canadian Eastern Corn, August 1, 1947 to January 31, 1948 - Cont'd.

White Corn	Bushels	Mixed Corn	Bushels
1 C. E.	3,235	Tough 1 C. E.	1,630
2 C. E.	10,085	Tough 4 C. E.	2,085
3 C. E.	1,380	Damp 1 C. E.	1,550
Tough 1 C. E.	3,615	Damp 2 C. E.	2,860
Tough 2 C. E.	27,238	Moist 1 C. E.	4,445
Damp 1 C. E.	3,120	Moist 2 C. E.	17,452
Damp 2 C. E.	17,010	Moist 3 C. E.	1,430
Moist 2 C. E.	1,255	Wet 3 C. E.	1,595
Ex. Dry 1 C. E.	12,500		
Ex. Dry 2 C. E.	25,805	Other Grades	
Ex. Dry 3 C. E.	4,130	Tough 2 C. E.	2,790
		Tough Sample C.E.	13,645
Mixed Corn		Moist Sample C. E.	7,645
2 C. E.	3,010	Wet Sample C. E.	2,325
3 C. E.	1,300	Sample C. E.	11,094
4 C. E.	1,260	Sample C. E. Musty	4,370

Total Eastern Corn 2,210,220 bushels

During the first half of the current crop year 2.2 million bushels of Eastern corn were inspected as against a figure of 2.3 million bushels for the same period in the crop year 1946-47. The breakdown of gradings shown in the preceding table indicates that the 1947 Eastern corn crop was of relatively high quality.

Inspections of Canadian Western Corn August 1, 1947 to January 31, 1948

	Cars		Cars
2 C. W. Yellow	1	Tough	2
3 C. W. Yellow	8	Moist	2
4 C. W. Yellow	4	Wet	11
5 C. W. Yellow	2	Sample	5

Total Western Corn 35 Cars

Inspections of Western corn for the first half of the crop year amount to 35 cars as compared with 20 cars for the same period in 1946-47. In terms of bushels, current crop year inspections run to approximately 58,000 bushels as against 32,940 bushels in 1946-47.

Imports of Corn into Canada - Reflecting the small size of the 1947 Canadian corn crop, imports of corn during 1947 exhibited a marked increase over those of 1946. Customs import statistics for the calendar year 1947 indicate total corn imports of 8,085,768 bushels, of which 7,980,043 bushels were obtained from the United States. In 1946 imports of corn amounted to 4,625,246 bushels, with 2,502,868 bushels of this total being obtained from the United States.

OIL-BEARING SEED CROPS

Flaxseed - In the latest crop estimate released on February 24, the Dominion Bureau of Statistics places the 1947 production of flaxseed at 12,240,800 bushels. This estimate is 700,000 bushels greater than that released in November and results from an upward revision of flax acreage and production in the province of Saskatchewan. On February 12 a 50 cents per bushel final payment was announced for the 1947 flaxseed crop, bringing the estimated average farm price for all Canada up to \$5.22 per bushel and the Lakehead price for No. 1 C.W. flax to \$5.50 per bushel. The 1947 crop was produced from 1,571,300 acres, the highest acreage seeded to flax since 1943.

During the calendar year 1947 Canadian oilseed plants crushed 4.6 million bushels of flaxseed, yielding 88.7 million pounds of linseed oil and 165.0 million pounds of linseed oilcake. Crushings in 1946 were somewhat greater with 5.3 million bushels of flaxseed yielding 100.2 million pounds of oil and 182.0 million pounds of oilcake. Out of the 1947 oil production over 12 million pounds were exported.

Western farmers between August 1, 1947 and February 19, 1948 had marketed 9.3 million bushels of flaxseed and on the latter date 6.5 million bushels were still in visible supply. More than half of these visible stocks was located in Lakehead terminals, while 1.4 million bushels were still in country elevators. From August 1, 1947 to January 31, 1948 sales of flaxseed by the Canadian Wheat Board to the domestic oilseed crushing industry amounted to nearly 4 million bushels, while sales to Norway and the United Kingdom accounted for approximately 388,000 bushels. During the same period in the previous crop year 3.2 million bushels were sold to domestic crushers and none for export. It is estimated that sufficient quantities of flaxseed will be available to meet the demands of domestic crushers during the remainder of the current crop year and to provide a further surplus for export.

The price for the 1948 flaxseed crop has not yet been set but it has been stated that an announcement on this subject will be made at the earliest possible date.

Soy Beans - Soy bean inspections in the Eastern Division amounted to 831,000 bushels for the first six months of the current crop year. This amount is far short of domestic requirements and fairly substantial imports would be required if domestic demands for soy bean oil and oilcake are to be met. Imports of soy beans in 1947 amounted to nearly 1.5 million bushels in addition to imports of approximately 46,000 tons of soy bean oil meal and significant quantities of soy bean oil.

Sunflower Seed - The estimate for the 1947 Canadian production of sunflower seed in Canada still stands at 20,000,000 pounds produced from 25,000 acres in the province of Manitoba, a substantial increase over the 1946 crop of 13.4 million pounds. The Canadian Wheat Board is authorized to buy the 1947 crop at six cents per pound for the top grade, f.o.b. shipping points named by the Board. The Minister of Trade and Commerce announced on February 12 that the same policy would apply during the 1948-49 crop year.

Rapeseed - The 1947 commercial crop of rapeseed was confined to the province of Saskatchewan where some 26.2 million pounds were harvested from 58,300 acres. The 1947 outturn was more than double the 1946 crop of 13 million pounds. As in the case of sunflower seed the Canadian Wheat Board is authorized to buy the 1947 and 1948 rapeseed crop at six cents per pound for the top grade, f.o.b. shipping points named by the Board.

DOMESTIC AND EXPORT PRICES OF CANADIAN COARSE GRAINS

With the removal of price ceilings on oats and barley on October 22 prices of these grains advanced sharply, the January averages standing at 85 1/4 cents and \$1.28 1/2 per bushel for No. 1 feed oats and barley respectively. The former ceiling prices of these grains had been 51 1/2 cents for oats and 64 3/4 cents for barley. Prices of all grains on the open market dropped in February in sympathy with the decline on the United States Grain Exchanges. No. 1 feed barley was quoted on February 11 at \$1.06 per bushel, but by February 24 it had dwindled back to \$1.14 1/8.

An important statement was made on March 1, relative to the continuance of support prices on oats and barley. Speaking in the House of Commons, The Right Hon. C. D. Howe, Minister of Trade and Commerce said " During the current crop season support prices for both oats and barley are in effect and the Government intends to extend these to July 31, 1949 at the same support levels prevailing this crop year. Oats will continue to be supported at levels based on 61 1/2 cents for No. 1 feed oats, in store Fort William-Port Arthur, with other grades at appropriate differentials to be fixed from time to time by the Wheat Board. Barley will also be supported at 90 cents per bushel for No. 1 feed barley, in store Fort William-Port Arthur, with other grades at appropriate differentials to be fixed from time to time by the Wheat Board.

The purpose in making this announcement at this time is to enable producers of oats and barley to plan their operations for the coming crop year with the assurance that market prices will not decline below the support levels. As in the present crop year, The Canadian Wheat Board will be directed to implement this policy."

Average prices for the months ending					
	January 1946 1/	January 1947 1/	November 1947	December 1947	January 1948
- cents and eighths per bushel -					
<u>OATS 2/</u>					
(1) Domestic and Country					
2 C.W.	51/4	51/4	87/5	88/5	96/5
Ex. 3 C. W.	51/4	51/4	86	85/3	94/2
3 C.W.	51/4	51/4	85/7	84/3	87/3
Ex. 1 Feed	51/4	51/4	85/5	84/3	86/4
1 Feed	51/4	51/4	85/2	82/4	85/2
2 Feed	50/4	51/4	81/5	77/6	80/5
3 Feed	49	51/4	79/4	75/6	77/2
(2) Export-Schedule of Prices (1) plus equalization fees					
Equalization Fees - East	33/4	41/7	46	52/4	55/2
West	33/4	41/7	46	52/4	55/2
B.C.	33/3	41/7	46	52/4	55/2

1/ Plus an advance equalization payment to producers of 10 cents per bushel. These payments discontinued March 18, 1947.

2/ Price basis in store Fort William-Port Arthur and Vancouver.

Average prices for the months ending					
	Jan. 1946 <u>1/</u>	Jan. 1947 <u>1/</u>	Nov. 1947	Dec. 1947	Jan. 1948
<u>BARLEY</u> <u>2/</u> - cents and eighths per bushel -					
(1) Domestic and Country					
1 C.W. Six-Row	64/6	64/6	137/7	153/1	158
2 C.W. Six-Row	64/6	64/6	137/7	153/1	158/1
3 C.W. Six-Row	64/6	64/6	132/7	148/1	153/1
1 C.W. Two-Row	64/6	64/6	132/7	148/1	153/1
2 C.W. Two-Row	64/6	64/6	132/7	148/1	153/1
2 C.W. Yellow	-	64/6	132	141/1	145/3
3 C.W. Yellow	-	64/6	123/6	129	132/7
1 Feed	64/6	64/6	122/5	127/1	128/4
2 Feed	64/6	64/6	121	124/3	127/7
3 Feed	64/6	64/6	118/2	121/1	123/5
(2) Export Schedule of Prices (1) plus equalization fees					
Equalization Fees - East	49	110	122/7	119/4	111/6
West	45	106	122/7	119/4	111/6
<u>RYE</u> <u>2/</u>					
(1) Domestic and Country					
2 C.W.	205/7	258/2	392/3	402/3	415
3 C.W.	200/3	253/2	387/3	397/3	410
4 C.W.	193/4	245/5	377/3	382/7	390/4
Ergoty	177/1	215/5	357/3	367/3	376/5
Rejected 2 C.W.	180	232/5	372/3	378/3	386/5
(2) Export - same as Schedule 1					
<u>FLAXSEED</u> <u>2/</u>					
(1) Domestic and Country					
(a) Domestic - to crushers					
1 C.W.	275	275	500	500	500
2 C.W.	271	271	495	495	495
3 C.W.	262	262	484	484	484
4 C.W.	258	258	475	475	475
(b) Country					
1 C.W.	275	325	500	500	500
2 C.W.	271	321	495	495	495
3 C.W.	262	312	484	484	484
4 C.W.	258	308	475	475	475
(2) Export - same as Schedule 1					
Equalization Fees - East	-	-	187	no official quotations	
West	-	-	187		

1/ Plus an advance equalization payment to producers of 10 cents per bushel. These payments discontinued March 18, 1947.

2/ Price basis in store Fort William-Port Arthur and Vancouver.

UNITED STATES SITUATION

The following summary is reprinted from the January-February 1948 issue of "The Feed Situation" a publication of the Bureau of Agricultural Economics of the United States Department of Agriculture:

"Farmers will have much less grain to feed their live stock during the first half of 1948 than the very large quantity fed in the first half of last year. Stocks of corn, oats and barley in all positions on January 1 totalled 61.0 million tons, the smallest in any year since 1937, and 25 per cent less than the large supply on hand a year earlier. Total stocks of these grains and stocks per grain-consuming animal unit are both about 14 per cent below the 1938-42 average.

Much of the decrease from 1947 is in corn. On January 1, stocks of corn in all positions totalled 1,567 million bushels, 29 per cent less than at the beginning of 1947. Oats stocks were down 15 per cent, but barley supplies were 7 per cent larger than a year earlier. Supplies of by-product feeds are expected to be larger than average in the first half of 1948, and may be nearly as large as the record supply for that period of 1947.

Prices of most feed concentrates reached record levels in January. Compared with January 1947, feed grain prices were up 90 per cent, wheat mill-feeds more than 100 per cent, and protein feeds 30 to 50 per cent. Hay prices, however, were only slightly above those of a year earlier. Feed prices are expected to continue much higher than a year earlier through this winter and spring.

Feed grains disappeared at a fairly rapid rate during the last quarter of 1947. The combined domestic disappearance of corn, oats, and barley was 6 per cent larger than the 1937-41 average for the quarter, although 8 per cent less than in October-December 1946, when feed grain supplies were near record.

During the first half of this year, farmers are expected to feed around 15 per cent less feed grain to their live stock than in the first six months of 1947. Exports will be small in contrast to the large amount of feed grains sent abroad in the first half of 1947. Carry-over of corn, oats, and barley at the end of the 1947-48 marketing year is expected to be much smaller than the 13.7 million tons on hand a year earlier.

Stocks of hay on January 1 were about as large as on January 1, 1947, and are adequate in most regions for the hay-consuming live stock on farms. Disappearance of hay during May-December was 5 per cent smaller than in the same period of 1946.

Feed supply prospects for the North Atlantic Region, as in most other deficit feed areas, are much less favourable for the first half of 1948 than they were in the first half of 1947. Live-stock and poultry numbers in this region are still fairly large. With the strong demand for feed, the average price paid for mixed dairy feed in mid-January was 35 per cent higher and the price of poultry ration 40 per cent higher than a year earlier. Prices of these feeds were the highest on record."

MARKETING OF AUSTRALIAN OATS AND BARLEY

By kind permission of the Trade Commissioner Service, the Editors of this publication are pleased to publish in full the following reports prepared by Dr. W. C. Hopper, Commercial Secretary for Canada (Agricultural Specialist), Sydney, Australia.

"Marketing Australian Oats"

The establishment of a voluntary pooling system for the 1947-48 oat crop and the granting to the Australian Barley Board of the sole rights to export oats from Australia, was recently announced by the Commonwealth Minister for Commerce and Agriculture, Mr. Pollard. This pool will apply to all States but growers will be free to sell on the open market if they desire. The Government has guaranteed 3/3 (about 52.3 cents at present rates of exchange) a bushel in bags, on rails at growers' sidings, plus 3d. (about 4 cents) a bushel to offset the higher cost of bags or a total of 3/6. It is expected that growers will have to hold their oats for some time in order to give preference in transport to the heavy wheat and barley crops and they will not be permitted to rail oats until advised to do so by the Barley Board. Growers will be responsible for storing their oats either on their farms or at sidings and for any cost incurred up to the trucking stage. From the point of trucking (railroad sidings) however, the Barley Board will accept responsibility.

While last year the export of oats was banned, the coming crop should provide a substantial surplus over local requirements, and it is anticipated that an export market at high prices will be obtained. The British Ministry of Food has agreed to purchase twelve million bushels at 11/6 (about \$1.85).

The remaining stocks of last year's oat crop, which had been purchased by the Government at 3/- a bushel, have been sold for export at a profit. The Government has decided, even though it was a direct purchase of oats and had no obligations to distribute the profits from its activities, that when the exact amount of profit is available it will be paid back to the growers. As a first dividend on this profit a payment of 1/- per bushel on the 1946-47 oats delivered to the Barley Board will be made.

It is expected that the 1947-48 oat crop will be a record one, estimated at 35 to 40 million bushels compared with 16 million bushels in 1946-47 and 26 million bushels in 1945-46. Growers who deliver 1947-48 oats to the Barley Board will share, under the pool, in any profits made from export sales.

Price ceilings on oats have been removed by the Prices Commissioner as supplies are now considered to be adequate to meet all local requirements. To ensure price stability the Barley Board will sell oats for local use at fixed prices, namely, 4/3 (about 69.6 cents) for feed oats and 4/6 (about 72.5 cents) for oats of milling quality.

Oats are grown in all of the six States with the largest production in New South Wales and Victoria and the smallest in Queensland and Tasmania.

The Barley Board offered to purchase oats of the 1944-45 crop for 2/9 for forty pounds but received none. In 1945-46 the Barley Board offered 3/- per bushel and received about 6 1/2 million bushels. The price offered for the 1946-47 crop was also 3/- but only about half a million bushels were purchased. It is expected that the Barley Board will receive large quantities of oats from the 1947-48 crop.

One of the serious problems with respect to the 1947-48 crop will be to obtain adequate storage for the oats.

Marketing Australian Barley

All the barley grown in the states of Victoria and South Australia, where about 95 per cent of Australian barley production occurs, is acquired and marketed by the Australian Barley Board. The authority of this Board is derived from the National Security Regulations. Prior to 1939 Australian barley was all sold on the open market.

The latest estimate of the 1947 barley crop is twenty million bushels. Australian brewers and distillers require five to six million bushels annually, about three to six million bushels will probably be used for live stock feed in Australia, which will leave about nine to eleven million bushels for export. There is never any carry-over from year to year because of the danger of injury from weevils.

The Commonwealth Minister of Commerce and Agriculture stated on December 19 that from this year's record barley crop large surpluses will be available for export and sales are now being made by the Australian Barley Board at high prices. The present export price is about 20/- per bushel of 50 pounds (at present exchange rates about \$3.22 Canadian currency.)

The local Australian price is 6/10 (about \$1.10 Canadian) per bushel which is an advance over the local price of 6/1 (about 98 cents) which prevailed for the past three years. The policy of the Barley Board is to supply Australia's needs first.

The Commonwealth Government provides finances to guarantee initial payments to barley growers. The first advances on this season's crop will be 4/9 (about 76 cents) a bushel, for two-row malting grades, 4/3 (about 68 1/2 cents) for six-row malting grades, 3/7 (about 57 1/2 cents) for two-row feed barley, and 3/4 (about 53 1/2 cents) for 6-row feed barley. All these advances are made at the growers' delivery points or sidings in bags.

The exportable surplus is sold through the Australian Barley Committee in London, which consists of three English merchants who handled the major part of the Australian barley exported prior to 1939. The Australian Barley Board enters into contract with overseas buyers through the medium of the Australian Barley Committee in London. Exports are made to the United Kingdom, Continental Europe, India, and other countries.

Merchants in Australia are licenced as receivers of barley by the Barley Board on a fixed commission. There is no speculation in this crop.

Receipts from all sales are pooled and returns made to producers.

There are four grades of two-row barley, viz., Nos. 1, 2, 3, and feed. Six-row barley is now graded but is sold on sample.

Growers returns in 1945-46 were for two-row 6/- per bushel (about 97 cents) for malting grade and 4/4 (about 69 cents) for the feed grade. For six-row the returns to purchasers were 5/3 (about 84 cents) and 2/9 (about 44 cents). For the 1946-47 crop growers have received to date 7/- (about \$1.12) for two-row, and 6/3 (about \$1.01) for six-row malting grades. Further payments are yet to be made on this crop.

When the emergency powers of the Commonwealth cease to function after December 31, 1948, it is expected that the State Governments in Victoria and South Australia will adopt legislations to continue the method of marketing now in operation by the Australian Barley Board. As a matter of fact the State Government of South Australia has already passed an act relating to the marketing of barley which provides for the marketing of barley produced in South Australia and by a board comprising representatives of South Australia and Victoria and for a pool of barley producers. Similar action is expected by the Government of Victoria. (At present exchange rates 1 shilling equals 16.12 Canadian.)"