

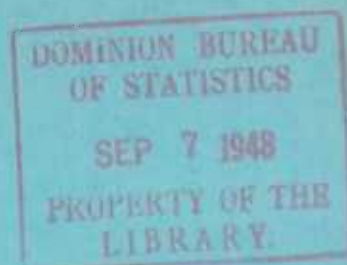
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CANADA

DOMINION BUREAU OF STATISTICS  
AGRICULTURAL DIVISION



Vol. 7

No. 4

# CANADIAN COARSE GRAINS

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## QUARTERLY REVIEW

AUGUST, 1948

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# CANADIAN COARSE GRAINS - QUARTERLY REVIEW

AUGUST 1948

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FEED SITUATION IN CANADA

Supply Position--Oats and Barley - In contrast with the fairly tight situation existing throughout the 1947-48 crop year, a relatively easy coarse grain supply situation is in sight for 1948-49. The first estimate of production released by the Dominion Bureau of Statistics on August 17 places the probable outturn of oats at 338 million bushels and barley at 146 million. Both these estimates represent increased production over last year's levels, the increases amounting to 60 million and 5 million bushels respectively. Carry-over stocks of oats in all positions at July 31 were 47.2 million bushels, 22.4 million lower than on July 31, 1947. Barley stocks of 31 million bushels were up slightly over last year's carry-over of 29.1 million.

The following table has been set up to allow for comparison of the current oats and barley situation with that existing in past years. Imports which are normally quite small have not been included in the supply picture.

Carry-over, Production and Supply of Canadian Oats and Barley  
(Crop Years 1938-39 to 1948-49)

Crop Year	Carry-over at Beginning	Production	Total Supplies
(million bushels)			
<u>OATS</u>			
1938-39 .....	19	371	390
1939-40 .....	49	384	433
1940-41 .....	47	381	428
1941-42 .....	42	306	348
1942-43 .....	29	652	681
1943-44 .....	149	482	631
1944-45 .....	108	500	608
1945-46 .....	98	382	480
1946-47 .....	77	371	448
1947-48 .....	70	279	349
10-year average (1938-39-1947-48)	69	411	480
1948-49 (Preliminary estimate)..	47	338	385
<u>BARLEY</u>			
1938-39 .....	7	102	109
1939-40 .....	13	103	116
1940-41 .....	13	104	117
1941-42 .....	11	111	122
1942-43 .....	11	259	270
1943-44 .....	69	216	285
1944-45 .....	46	195	241
1945-46 .....	29	158	187
1946-47 .....	30	149	179
1947-48 .....	29	141	170
10-year average (1938-39-1947-48)	26	154	180
1948-49 (Preliminary estimate)..	31	146	177

While potential supplies of oats and barley for 1948-49 are considerably below the abnormally high levels of the war years, it will be noted that a quite favourable relationship exists when comparison is made with the pre-war period. It will also be observed that supplies for 1948-49 are significantly greater than the quantities available during the crop-year just completed. Of great importance, too, is the fact that production in 1948 is more evenly distributed between eastern and western Canada, with Ontario anticipating an oat crop of 76 million bushels in comparison with last year's low outturn of 41.5 million. With production east of the Lakes improved this year, it is expected that requirements for western feed grains on the part of eastern feeders will be much less during 1948-49.

Live-stock populations in Canada have declined sharply from the wartime peak. As a result domestic requirements for feed grain have dropped accordingly and, should current 1948 crop prospects be fully realized, significant quantities of Canadian oats and barley will be available for export during 1948-49.

Supply Position--Rye, Flaxseed and Protein Feeds - The August estimate of production places the 1948 rye crop at 26 million bushels, almost double the 1947 outturn. A near-record Canadian flaxseed crop of 18 million bushels is also expected. Last year's flaxseed production was 12.2 million bushels, while the largest flaxseed crop ever harvested in Canada amounted to 26.4 million in 1912. Carry-over stocks of rye at 727,000 bushels were a little below last year's holdings but flaxseed stocks at 3.3 million were up sharply from the July 31, 1947 level of 0.8 million.

High protein feeds, particularly oilcake and meal, have been in better supply for some months past and restrictions on exports have been progressively eased.

Current Policy - On July 21 the Canadian Wheat Board announced that no delivery quotas would be established on rye and flaxseed in the crop year 1948-49. The Board stated that delivery quotas on wheat, oats and barley would be left 'open' after July 31, until new crop deliveries and shipments should reach such a volume as would make necessary the establishment of local delivery quotas for one or more of these grains. On August 27 the Board announced that, effective August 30 the delivery quota on wheat, oats and barley would be 10 bushels per seeded acre, except at certain points now declared 'open'. Wheat, oats and barley delivered by producers between August 1, 1948 and August 28, 1948, in accordance with Board regulations, will not apply against the present delivery quota of 10 bushels per seeded acre.

With a more favourable coarse grain supply developing, export restrictions were progressively eased during the latter part of the 1947-48 crop year. On July 30, the expiry date of export permits for oats and barley was extended to October 1, 1948. Export permits are still required, but since August 1 they have been made available without payment of equalization fees.

On August 2 the Wheat Board announced that oats and barley prices would continue to be supported until further notice. The support prices for all grades with the exception of No. 1 Feed Oats and No. 1 Feed Barley, were increased slightly over the support levels made effective March 18, 1947. Support prices for No. 2 C.W. Oats and No. 1 Feed Barley are currently 66 1/2 cents and 90 cents per bushel respectively, basis in store Fort William-Fort Arthur.

Subsequent to the removal of the price ceiling on flaxseed the Winnipeg Grain Exchange announced that trade in flaxseed, both cash and futures, would commence on August 16. On August 30, No. 1 C.W. Spot Flax was trading on the exchange at \$4.28 1/2 per bushel, 28 1/2 cents above the support price of \$4.00, which became effective August 1.



## ACREAGE AND FIRST ESTIMATE OF CANADA'S 1948 GRAIN PRODUCTION

Production of all grain crops in Canada in 1948, as estimated on August 17 by the Dominion Bureau of Statistics, will be greater than in 1947. The wheat crop for all Canada in 1948 is estimated at approximately 372 million bushels, some 31 million bushels greater than the production in 1947 but about 35 million below the ten-year (1938-47) average outturn. In the Prairie Provinces the wheat crop is expected to yield 340 million bushels as compared with 319 million in 1947. Since there has been a slight reduction in acreage, this indicated increase is wholly attributable to greater yields per acre. Production of fall wheat, if present indications are realized, will represent an increase of more than 50 per cent over the 1947 crop.

The production of oats in 1948 is placed at approximately 338 million bushels, a gain of some 59 million over the 1947 outturn. Although there has been some increase in acreage, the larger 1948 production is due mainly to an excellent crop in Ontario and higher anticipated yields per acre in Quebec and Manitoba. The gains in barley are not as great as in wheat and oats but the estimated production of 146 million bushels is an increase of approximately 5 million over the 1947 crop.

The combined production of spring and fall rye, estimated at 26.3 million bushels, is practically double the 1947 outturn. While average yields are expected to show a slight improvement over last year, most of the increase is the result of the larger 1948 acreage of 2.1 million acres, almost double that of 1947. A near-record Canadian flaxseed crop of 18 million bushels from 1.9 million seeded acres is anticipated this year, the largest flaxseed crop previously harvested in Canada amounting to 26.1 million bushels in 1912.

### August Estimate of Production of Canada's Grain Crops 1948, and Revised Data for 1947

Province and Crop	Area		Yield Per Acre		Production	
	1947	1948	1947	1948	1947	1948
	acres	acres	bu.	bu.	bu.	bu.
<b>Canada</b>						
Fall Wheat .....	712,300	858,500	24.9	32.0	17,736,000	27,472,000
Spring Wheat ...	23,548,100	23,247,400	13.7	14.8	323,022,000	344,495,000
All Wheat .....	24,260,400	24,105,900	14.0	15.4	340,758,000	371,967,000
Oats .....	11,048,500	11,200,300	25.2	30.2	278,670,000	338,269,000
Barley .....	7,465,000	6,495,300	18.9	22.5	141,372,000	146,175,000
Fall Rye .....	840,800	1,605,900	12.2	12.8	10,234,000	20,551,000
Spring Rye .....	315,600	497,200	9.5	11.5	2,983,000	5,717,000
All Rye .....	1,156,400	2,103,100	11.4	12.5	13,217,000	26,268,000
Flaxseed .....	1,571,300	1,934,500	7.8	9.3	12,240,800	18,044,600
			tons	tons	tons	tons
Hay and clover .	10,201,700	9,748,000	1.59	1.61	16,193,000	15,661,000
Alfalfa (first cutting) .....	1,135,100	1,317,300	1.61	1.73	1,825,000	2,280,000
<b>Prairie Provinces</b>			bu.	bu.	bu.	bu.
Wheat .....	23,357,000	23,045,000	13.7	14.8	319,000,000	340,000,000
Oats .....	7,898,000	7,535,000	24.6	27.6	194,000,000	208,000,000
Barley .....	7,035,000	6,082,000	18.6	22.0	131,000,000	134,000,000
Rye .....	1,072,000	1,965,000	10.8	11.9	11,630,000	23,300,000
Flaxseed .....	1,513,000	1,868,000	7.6	9.3	11,550,000	17,300,000

## FARMERS' MARKETINGS

Total marketings of oats, barley, rye and flaxseed by western farmers to July 29 of the current crop year were 158.7 million bushels, a decrease of 19 million from last year's revised marketings of 177.7 million bushels. Marketings of oats were 26.8 million bushels less than last year, accounted for by a 53 million bushel decrease in the Prairie Provinces oat crop and the smaller percentage of the 1947-48 crop marketed.

Barley marketings were down approximately 2 million bushels from the 1946-47 level. Marketings of both rye and flaxseed, however, were considerably larger, with flaxseed marketings being more than double the 1946-47 figure. In the case of both rye and flaxseed, the 1947-48 production was higher than in the previous year and, taking into consideration the absence of marketing quotas and the high prices prevailing throughout the crop year, well over 80 per cent of these crops was marketed.

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 July 29, 1948

	O A T S		B A R L E Y	
	Bushels	% 1947 Crop	Bushels	% 1947 Crop
Manitoba .....	11,486,727	29.5	17,582,069	51.7
Saskatchewan .....	35,045,495	43.8	26,136,279	58.1
Alberta .....	26,447,877	35.3	21,851,740	42.0
T o t a l .....	72,980,099	37.6	65,570,088	50.1
Same Period in 1946-47 ....	99,765,491	40.4	67,518,803	50.4

	R Y E		F L A X S E E D	
	Bushels	% 1947 Crop	Bushels	% 1947 Crop
Manitoba .....	1,253,813	209.0	4,282,655	82.4
Saskatchewan .....	5,509,775	81.3	4,157,650	99.0
Alberta .....	3,036,455	71.4	1,872,070	87.1
T o t a l .....	9,800,043	84.3	10,312,375	89.3
Same Period in 1946-47 ....	5,577,317	76.6	4,795,025	77.2



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

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>							
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	99,765,491	34.7
5-year average ..	10,234,680	35.0	356,660,000	54,236,800	410,896,800	121,595,446	29.6
1947 .....	7,898,000	24.6	194,000,000	39,812,000	233,812,000	72,980,099 <sup>4/</sup>	31.2
<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	67,518,803	45.9
5-year average ..	6,745,880	26.8	180,280,000	19,453,800	199,733,800	76,498,904	38.3
1947 .....	7,035,000	18.6	131,000,000	15,453,000	146,453,000	65,570,088 <sup>4/</sup>	44.8
<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	5,577,317	74.4
5-year average ..	673,530	13.0	9,546,600	1,565,080	11,111,680	5,463,408	49.2
1947 .....	1,072,000	10.8	11,630,000	212,000	11,842,000	9,800,043 <sup>4/5/</sup>	82.8
<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	4,795,025	70.1
5-year average ..	1,507,380	7.6	11,050,200	520,600	11,570,800	8,500,816	73.5
1947 .....	1,513,000	7.6	11,550,000	436,000	11,986,000	10,312,375 <sup>4/</sup>	86.0

<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, 1942-43 to 1946-47.

<sup>4/</sup> August 1, 1947 to July 29, 1948.

<sup>5/</sup> Includes some Rye imported from U.S.A.

# CARRY-OVER STOCKS OF CANADIAN GRAIN AT JULY 31, 1948

Stocks of Canadian wheat, oats and rye in all positions at July 31, 1948 were less than at the end of the 1946-47 crop year, with substantial decreases being registered for both wheat and oats. Stocks of Canadian wheat at 76 million bushels were down 11.4 million or 13 per cent from the revised estimate of last year's carry-over. Continuing heavy exports of wheat relative to available supplies during the post-war years have been largely responsible for the low carry-over stocks. Farm-held stocks of wheat are 13.1 million bushels larger than last year and account for more than half the total carry-over stocks in all positions.

Stocks of oats at 47.2 million bushels are 22.4 millions less than last year, 15 million bushels of this decrease being accounted for by this year's smaller farm-held stocks. Barley stocks in all positions are 31.1 million bushels, an increase of 2 million over 1947. Carry-over stocks of rye at 727,000 bushels were only slightly below last year's holdings but flaxseed stocks at 3.3 millions were up sharply from the July 31, 1947 level of 0.8 million.

## Position of Canadian Grain Stocks,<sup>1/</sup> July 31, 1948

	<u>Wheat</u>	<u>Oats</u>	<u>Barley</u>	<u>Rye</u>	<u>Flaxseed</u>
	- bushels -				
<u>In Canada</u>					
On Farms .....	39,162,000	37,593,000	17,373,000	276,000	295,000
Country & Pte. Term. Elevs. .	12,978,694	1,556,657	3,720,825	305,811	576,337
Western Mills & Mill Elevs. .	2,198,658	911,525	313,718	22,444	-
Interior Terminal Elevators .	113,945	86,071	360,712	63	57,288
Vancouver-New Westminster ...	1,476,535	250,012	120,503	-	-
Victoria and Prince Rupert ..	-	-	-	-	-
Churchill .....	944,522	1,443	-	-	-
Fort William-Port Arthur ....	7,375,423	2,230,286	4,272,151	86,270	1,213,165
In Transit - Lakes .....	1,541,652	553,498	811,317	-	249,117
In Transit - Rail .....	4,060,361	499,164	520,957	33,541	178,924
Eastern Elevators .....	4,743,291	2,012,453	2,863,550	3,139	726,512
Eastern Mills (Estimated) ...	1,363,702	698,777	415,372	192	-
Total in Canada .....	75,958,783	46,392,886	30,772,105	727,460	3,296,343
Canadian Grain in U.S.A. ....	34,652	825,085	295,905	-	-
Total Canadian Grain in Canada and United States ...	75,993,435	47,217,971	31,068,010	727,460	3,296,343
<u>Carry-over on July 31, 1947 - Revised</u>					
In Canada .....	87,279,657	69,559,055	29,112,331	735,172	799,929
In United States .....	87,000	91,000	-	23,000	-
Total in Canada and U.S.A. ..	87,366,657	69,650,055	29,112,331	758,172	799,929

<sup>1/</sup> Subject to revision.

Despite decreased carry-over stocks of wheat and oats in comparison with 1947, Canadian feed supplies should be higher during the current crop year, than in 1946-47 due to the indicated increase in production of all grains. On the basis of the first estimate of Canada's 1948 grain production, total supplies of oats (including carry-over at July 31, 1948) for the current crop year will be 385.5 million bushels, compared with the 1947-48 figure of 348.3 million. Comparable figures for barley are 177.3 million and 170.5 million bushels respectively.

Farm-held stocks of wheat in the Prairie Provinces are considerably above last year's stocks of 24.5 million bushels but oats are down from the 39.8 million bushel carry-over at July 31, 1947. Barley stocks are 1.5 million bushels greater than a year ago. Rye stocks are slightly higher than last year's 212,000 bushels while stocks of flaxseed at 295,000 bushels are down from the 436,000 bushels on western farms at July 31, 1947. The farm-stock position in each of the three Prairie Provinces at the end of July 1948 was as follows:

Farm Stocks of Grain, Prairie Provinces, July 31, 1948

	Wheat	Oats	Barley	Rye	Flaxseed
	- bushels -				
Manitoba .....	3,000,000	4,000,000	3,000,000	5,000	35,000
Saskatchewan .....	22,000,000	15,000,000	6,000,000	200,000	195,000
Alberta .....	13,000,000	13,000,000	8,000,000	70,000	65,000
Prairie Provinces .	38,000,000	32,000,000	17,000,000	275,000	295,000

Farm stocks of wheat, oats and barley in both Eastern Canada and British Columbia at July 31, 1948 were lower than a year ago, reflecting the relatively poor harvest of 1947, particularly in central Canada. As usual, the greater part of farm stocks of all grains are held in the Prairie Provinces. The farm stocks by provinces as of July 31, 1948 are set forth in the following table:

Farm Stocks of Grain, By Provinces, July 31, 1948

	Wheat	Oats	Barley	Rye	Flaxseed
	- 000 bushels -				
Prince Edward Island .	2	299	13	-	-
Nova Scotia .....	-	248	11	-	-
New Brunswick .....	-	427	7	-	-
Quebec .....	3	1,598	87	1	-
Ontario .....	1,098	2,904	245	-	-
Manitoba .....	3,000	4,000	3,000	5	35
Saskatchewan .....	22,000	15,000	6,000	200	195
Alberta .....	13,000	13,000	8,000	70	65
British Columbia .....	59	117	10	-	-
Total - Canada .....	39,162	37,593	17,373	276	295
July 31, 1947 .....	25,988	52,566	16,492	280	441



# CARRY-OVER OF CANADIAN COARSE GRAIN AND FLAXSEED, JULY 31, 1924-48

The steady downward trend in carry-over stocks of Canadian coarse grains since 1943 has continued in oats and rye but has been halted in barley and flaxseed. Stocks of oats at 47.2 million bushels on July 31, 1948 were 22.4 million less than last year's stocks and 21.7 million below the ten-year (1938-47) average of 68.9 million bushels. The highest carry-over of oats during the last twenty-five years was in 1943 with 149.3 million bushels while the lowest point during the same period was recorded in 1937 with 18.3 million bushels.

Barley stocks of 31.1 million bushels are up 2 million from last year and compare favourably with the ten-year average carry-over of 25.7 million bushels. Rye stocks are the second lowest during the last twenty-five years, the record low point occurring in 1937 when only 0.4 million bushels were carried over into the new crop year. Flaxseed, on the other hand, has a carry-over of 3.3 million bushels, approximately four times last year's carry-over and more than twice the ten-year average of 1.5 million bushels.

In the table below grain afloat to United States ports was not reported from 1924 to 1931 but has been included since 1932. Stocks of Canadian grain in U.S. lake and seaboard ports from 1924 to 1931 are for the week-end nearest July 31 for each of those years. Stocks on farms are included in all years.

## Carry-Over of Canadian Coarse Grains and Flaxseed, July 31, 1924-48

<u>At July 31</u>	<u>Oats</u>	<u>Barley</u>	<u>Rye</u>	<u>Flaxseed</u>
	- bushels -			
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	11,093,482	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	10,908,001	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 .....	77,491,528	29,937,099	768,149	1,649,218
1947 <u>1/</u> .....	69,650,055	29,112,331	758,172	799,929
1948 <u>2/</u> .....	47,217,971	31,068,010	727,460	3,296,343

1/ Revised

2/ Preliminary

# RAIL MOVEMENT FROM FORT WILLIAM- PORT ARTHUR

Increases in the rail movement of all grains from the Lakehead during 1947-48 brought total grain shipments to 33.2 million bushels, an increase of 3.5 million bushels over rail shipments in 1946-47. In both crop years the heaviest shipments occurred during the months January through April when, except from April 19 (in both 1947 and 1948) navigation from the Lakehead was closed. In the first four months of 1948 rail shipments from Fort William-Port Arthur amounted to 23.8 million bushels, over 70 per cent of the shipments for the entire crop year. For the same period in 1947 rail movement of all grains from the Lakehead amounted to 17.1 million bushels, less than 60 per cent of the 1946-47 shipments. The peak in rail shipments of wheat during the current crop year occurred in March while the heaviest movements of oats and barley were in April.

## Monthly Rail Shipments of Grain from Fort William-Port Arthur, 1947-48 and 1946-47

	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 .....	100,563	193,888	78,016	-
December .....	691,223	839,315	625,996	222,806
January .....	3,149,421	1,827,567	911,563	617,911
February .....	1,851,773	1,293,611	894,824	161,574
March .....	3,423,684	1,936,144	1,610,673	44,151
April .....	371,950	3,127,735	2,490,516	47,753
May .....	154,551	1,022,859	471,803	18,968
June .....	81,133	573,542	359,917	33,187
July .....	231,414	1,364,906	526,570	12,175
T o t a l .....	10,368,942	13,337,354	8,277,487	1,172,203
<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	282,251	118,812
January .....	2,462,002	1,326,096	1,159,905	283,622
February .....	1,816,087	1,469,150	930,289	158,887
March .....	1,711,013	1,966,427	975,959	66,311
April .....	566,006	1,560,982	625,695	1,500
May .....	361,386	1,924,885	592,483	12,857
June .....	241,475	1,038,141	322,933	2,000
July .....	123,145	551,620	349,984	4,000
T o t a l .....	9,758,598	13,038,132	6,226,618	657,489

# FREIGHT ASSISTANCE SHIPMENTS

Preliminary returns of claims for payment under Federal Freight Assistance Policy indicate that during the first eleven months of the 1947-48 crop year a total of 107 million bushels of wheat, oats and barley was shipped into eastern Canada and British Columbia. This is some 10 million bushels less than the total shipments during the same period last year but this difference will be reduced as further claims are made. Decreases have been registered in the shipments of all grains, with the largest decline occurring in shipments of oats. Shipments of screenings and millfeeds are also below those in 1946-47 but, as with wheat and coarse grains, further claims are likely to bring these shipments to a level approaching the movements in the previous corresponding period.

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

## August 1, 1947 to June 30, 1948

	Wheat	Oats	Barley	Screen-ings	Mill-feeds
	bu.	bu.	bu.	tons	tons
<u>1947-48</u>					
Ontario .....	8,085,463	26,081,805	15,043,503	25,543	236,637
Quebec .....	6,117,268	18,877,970	14,595,990	12,755	266,203
New Brunswick .....	649,980	2,181,444	1,416,752	1,841	43,341
Nova Scotia .....	721,558	2,285,678	1,396,000	1,135	46,027
Prince Edward Island ...	307,752	471,956	567,617	195	12,380
British Columbia .....	3,379,796	3,411,776	1,265,494	2,448	56,976
Total (11 months) .....	19,261,817	53,310,629	34,285,356	43,917	615,537
<u>11 months 1946-47 1/</u> .....	22,596,566	59,502,016	35,603,933	65,490	801,993

## August 1, 1946 to July 31, 1947

<u>1946-47 1/</u>					
Ontario .....	10,556,360	33,713,467	15,600,166	33,920	311,827
Quebec .....	7,989,953	22,750,023	17,964,071	26,802	342,797
New Brunswick .....	847,370	2,936,429	1,738,658	3,747	61,219
Nova Scotia .....	981,602	3,005,700	1,894,302	2,333	60,862
Prince Edward Island ...	456,786	699,744	604,777	533	17,169
British Columbia .....	4,638,335	4,611,553	1,665,523	3,191	77,882
Total (12 months) .....	25,470,406	67,716,916	39,467,497	70,576	871,756

1/ Revised.



## HOG-BARLEY RATIO

The hog-barley ratio in June and July resumed the upward trend which started in December 1947 but which had been temporarily reversed in April and May. The resumption of this upward trend is due almost entirely to the increase in price of hogs, the average price per 100 pounds, dressed weight, B-1 hog at Winnipeg increasing \$2 in the period May to July. During the same period the average price of No. 1 Feed barley showed remarkably little fluctuation.

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 July 1948:

(Long-time Average = 17.2)

	1943	1944	1945	1946	1947	1948
January .....	21.4	18.1	18.3	17.1	20.7	17.1
February .....	21.4	18.1	18.3	17.3	21.4	19.6
March .....	22.0	18.2	18.3	17.1	19.7	20.6
April .....	22.0	18.2	18.4	18.3	18.1	19.3
May .....	21.9	18.2	18.5	18.3	18.1	18.7
June .....	21.2	18.3	19.0	18.4	18.1	19.2
July .....	20.5	18.3	19.1	18.4	18.1	19.9
August .....	16.2	18.3	18.0	20.3	18.1	
September .....	16.2	18.3	18.2	21.0	19.6	
October .....	16.1	18.3	17.2	19.6	17.8	
November .....	16.5	18.3	17.0	19.5	14.4	
December .....	16.7	18.3	17.0	19.5	13.9	

Note:- The above data include the effect of subsidies on hogs from January 1944 to date, and advance equalization payments on barley from August 1943 to March 17, 1947 when such payments were discontinued.

## FEED AND LIVE-STOCK INDICES

Both feed and live-stock indices have shown considerable change in the months of May, June and July but, in contrast to the usual sympathetic movement, the trends have been in opposite directions. The drop in the feed index of 14.3 points from June to July was the greatest single decrease registered during the past three years while the live stock index moved steadily upwards to establish a new record high point of 182.7 since compilation of the present index commenced in 1926. Contributing to the decline in the feed index were lower prices of several commodities, including hay, corn, oats and rye. Increasing live-stock prices have been reflected in the rapidly climbing animal index which has advanced 15.1 points during the last three months under review.

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	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	159.6	164.3
March .....	118.3	123.6	105.7	126.1	118.8	141.0	156.8	163.9
April .....	113.6	124.2	104.6	126.5	122.2	142.4	164.2	167.6
May .....	113.0	121.1	105.4	127.7	122.7	143.4	174.7	171.2
June .....	113.7	122.4	104.8	130.5	123.1	144.4	172.1	180.1
July .....	114.2	122.3	102.8	130.6	124.6	142.7	157.8	182.7
August .....	109.3	121.4	103.4	129.3	130.0	142.8		
September ...	108.5	119.5	105.1	129.2	138.7	142.2		
October .....	107.0	124.8	108.7	135.8	152.2	145.2		
November .....	106.9	125.5	109.6	137.1	166.4	147.5		
December .....	108.3	125.4	110.7	137.0	168.2	156.8		

# DISPOSITION OF CANADIAN COARSE GRAINS

Following upon the poor 1947 crop, the domestic disappearance of oats during 1947-48 reached the lowest ebb since the drought period in the thirties. Domestic disappearance of barley in 1947-48, while lower than in the previous five crop years, was well above the level existing during the prewar years and up until 1941-42. In order to retain sufficient feed grain for the maintenance of domestic live-stock populations, exports were closely controlled during the greater part of 1947-48 and only in the latter months were restrictions eased to allow outward movement of these grains on any scale.

## Disposition of Canadian Coarse Grains (Crop Years 1930-31 to 1947-48)

	Domestic Disappearance <u>1/</u>	Exports <u>2/</u>	Carry- Over
- million bushels -			
<u>OATS</u>			
1930-31 .....	371	11	63
1931-32 .....	346	18	30
1932-33 .....	367	14	42
1933-34 .....	309	10	31
1934-35 .....	308	18	26
1935-36 .....	365	16	40
1936-37 .....	285	9	18
1937-38 .....	271	8	19
1938-39 .....	332	13	49
1939-40 .....	363	24	47
1940-41 .....	372	14	42
1941-42 .....	307	12	29
1942-43 .....	468	63	149
1943-44 .....	448	75	108
1944-45 .....	424	86	98
1945-46 .....	358	44	77
1946-47 .....	349	30	70
10-year average 1937-38-1946-47 .....	369	37	69
1947-48 (Preliminary Estimate) .....	291	10	47
<u>BARLEY</u>			
1930-31 .....	109	19	30
1931-32 .....	76	14	7
1932-33 .....	71	5	11
1933-34 .....	62	2	11
1934-35 .....	54	15	6
1935-36 .....	72	7	10
1936-37 .....	60	17	5
1937-38 .....	66	15	7
1938-39 .....	80	16	13
1939-40 .....	93	11	13
1940-41 .....	103	3	11
1941-42 .....	109	2	11
1942-43 .....	167	34	69
1943-44 .....	203	36	46
1944-45 .....	172	39	29
1945-46 .....	152	4	30
1946-47 .....	143	7	29
10-year average 1937-38-1946-47 .....	129	17	26
1947-48 (Preliminary Estimate) .....	136	3	31

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

2/ Includes oatmeal and rolled oats in terms of oats.



## GRAIN CORN

Preliminary acreage estimates for 1948 place the area seeded to grain corn in Canada at 232,300 acres, an increase of more than 40% over the 176,200 acres seeded in 1947 but still below the 1941-45 average of 283,000 acres. This crop is only grown commercially in the provinces of Ontario and Manitoba. In Ontario, the current year's seeding of 242,400 acres exceeds the 1941-45 average of 232,000 acres but in Manitoba the current year's 9,900 acres are far below the 1941-45 average of 51,000 acres. While no official estimate of 1948 corn production will be available until September 14, crop correspondents indicate that good yields are expected in both provinces.

The proportion of Canada's corn crops sold commercially in past years has been insufficient to satisfy the requirements of the starch and glucose industries, stock and poultry feed manufacturers and other commercial users. Substantial imports of this grain have accordingly been required and while the 1948 crop should exceed last year's production by a good margin, it is expected that corn will again be required from outside the country. Fortunately, the United States has a bumper corn crop in prospect and will doubtless have ample supplies available for export.

Canadian Production and Imports of Corn, Calendar Years 1940-47  
- 000 bushels -

Year	Production	Imports	Year	Production	Imports
1940 .....	6,956	683	1944 .....	11,700	4,214
1941 .....	13,362	2,287	1945 .....	10,365	1,660
1942 .....	14,372	4,632	1946 .....	10,661	4,625
1943 .....	7,775	2,804	1947 .....	6,682	8,086

## FLAXSEED

Assured of a floor price of \$4.00 per bushel for top grades, basis Montreal or Fort William-Port Arthur, Canadian farmers seeded 1.9 million acres to flax in 1948, a considerable increase over the 1947 seeding of 1.6 million. The first official estimate of production issued on August 17 places 1948 production in excess of 18 million bushels. With a carryover into the 1948-49 crop year of 3.3 million bushels and providing harvesting conditions remain normal, Canada's supply of flaxseed for the current crop year will amount to more than 21 million bushels.

Acreage, Yield and Production of Flaxseed in Canada

Year	Acreage	Yield	Production
	acres	bu. per ac.	bu.
1938 .....	210,200	6.0	1,259,000
1939 .....	298,100	6.9	2,044,000
1940 .....	381,500	8.0	3,049,000
1941 .....	996,500	5.8	5,788,000
1942 .....	1,492,200	10.0	14,992,000
1943 .....	2,947,800	6.1	17,911,000
1944 .....	1,323,100	7.3	9,668,000
1945 .....	1,059,200	7.2	7,593,000
1946 .....	840,900	7.6	6,402,700
1947 .....	1,571,300	7.8	12,240,800
10 year average (1938-47) ..	1,112,080	7.3	8,094,750
1948 (first estimate) .....	1,934,500	9.3	18,044,600



## MILLFEEDS

During the first eleven months of the 1947-48 crop year Canada's millfeed production amounted to 801,000 tons, down some 91,000 tons from the production recorded during the same period of the previous crop year. The reduced output may be attributed chiefly to the smaller quantities of wheat available to mills in recent months--a reflection of the relatively poor 1947 wheat crop.

Total exports of millfeeds for the eleven-month period ending June 1948, at approximately 29,000 tons were down about 10,000 tons from the export shipments during the comparable period of 1946-47.

According to the record of claims paid under the Freight Assistance Policy, as indicated elsewhere in this Review, nearly 77 per cent of the millfeeds produced during the first eleven months of 1947-48 moved into feeding areas under this scheme.

### Monthly Production and Distribution of Millfeeds

<u>1947-48</u>	<u>Production</u> tons	<u>Exports</u> tons	<u>Domestic</u> <u>Disappearance</u> 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	70,608
February .....	63,310	1,537	60,951
March .....	66,960	3,787	65,822
April .....	71,381	3,935	66,107
May .....	63,140	3,337	60,367
June .....	69,870	3,009	56,396
Total (11 months) ..	800,901	28,773	771,482

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 1946-47 is as follows:

	<u>Bran</u> tons	<u>Shorts</u> tons	<u>Middlings</u> tons	<u>Total</u> tons
<u>August-June</u>				
1946-47 (revised) .....	392,132	362,337	140,506	894,975
1947-48 .....	334,869	314,977	151,055	800,901

SUMMARY OF TELEGRAPHIC CROP REPORT, AUGUST 24, 1948

Haying in the Maritime provinces is still under way but is nearing completion in some districts. Some early seeded grains have been cut but much of the crop is green and will likely be cut for hay. The main potato crop in New Brunswick is very promising although some blight damage is in evidence.

Haying in Quebec has been completed in all districts except Gaspé, Abitibi, Temiscamingue and Saguenay. Although the hay crop is not as heavy as it was a year ago it compares favourably with an average year. Harvesting is under way and the outlook is much better than was indicated earlier in the season. Commercial crops look very promising especially potatoes, flax and tobacco. Pastures have been substantially improved by rains during the past two weeks. At the present time the over-all picture indicates a better than average production this year.

The harvesting of a near record crop in southern Ontario has continued under generally favourable weather conditions during the past two weeks. Wheat yields have been well above average and the outturn of spring grains in practically all districts has also been quite satisfactory. Harvesting of a large acreage of flaxseed is proceeding rapidly and indications are that yields will be about the same as last year's. Most late crops have shown excellent progress during the past two weeks but rain is needed in central Ontario and in the Niagara Peninsula to promote normal maturity. In northern Ontario, where harvesting is usually later, cutting of oats and barley was started during the second week of August. Yields in this section of the province are not expected to be as favourable as in southern Ontario but, with the exception of Kenora where crops are quite poor, spring grains are about average.

Favourable weather during the past two weeks has further enhanced crop prospects in the Prairie Provinces. This is particularly true for late-sown crops which are filling well. Wet weather in Manitoba, where much of the grain is ready to harvest, has delayed operations somewhat in many parts of that province. In Saskatchewan harvesting is under way in all districts and fair progress is being made. Crops are late in Alberta but are filling satisfactorily. Harvesting of spring grains will be general next week. Grasshopper damage is continuing in the affected areas of Alberta and Saskatchewan and sawflies are causing some damage in southern districts of these provinces.

Frequent scattered showers in Manitoba have delayed harvesting during the past two weeks with the result that only fair progress has been made in some areas. South of the C.P.R. main line over half of the cereal crops is cut or swathed with ten to twenty per cent threshed in some districts. Harvesting in most northern sections is getting well under way. Rust may adversely affect yields from late stands of flax. Reports indicate the cereal crop sample is generally of high quality with yields turning out from good to excellent. Sunflowers, corn and sugar beets also show promise of an excellent crop. Drier weather is now required to promote ripening and to facilitate harvesting and threshing operations.

Harvesting is under way in all districts of Saskatchewan with about 40 per cent of wheat cut in southern and central areas and averaging about 25 per cent for the province as a whole. Favourable weather for filling during recent weeks has resulted in good to excellent quality of all grains. Harvesting of fall rye is nearing completion with outturns somewhat better than anticipated in most areas. Sawfly and grasshopper damage is quite general over southern, western and central districts and many fields are being swathed to



reduce losses. Hail loss has been spotty and mostly confined to southern districts.

Crops in Alberta, though late, are maturing satisfactorily with weather conditions favourable for filling and ripening. Harvesting of spring grains has begun at scattered points and should be general next week. Barring the occurrence of frosts, fair to good yields are anticipated except in the eastern districts of the province where earlier drought damage is still evident. The rye harvest is well advanced with satisfactory outturns reported. Grasshoppers continue to damage cereal crops and flax, and sawfly infestation in early-sown wheat is considerable.

The weather throughout British Columbia has been unsettled with the result that harvesting of both hay and grain has been delayed. Digging of the main potato crop on Vancouver Island has commenced and late blight is reported to be more severe than usual in this district. The harvesting of apricots is now completed and peaches are moving to market in volume.

#### DOMESTIC AND EXPORT PRICES OF CANADIAN COARSE GRAINS

With reasonably good coarse grain crops in prospect over most of the country, prices of oats and barley moved downward toward the end of the crop year. This trend has also carried on during the month of August. Equalization fees on oats and barley also moved downward and were dropped entirely at the beginning of the new crop year.

Rye prices dropped sharply between May and July and prospects of a near-record 1948 crop have exerted a further bearish influence during August. Trading in flax, both cash and futures, began on the Winnipeg Grain Exchange on August 16, with No. 1 C.W. spot flax trading at \$4.50 per bushel. On August 28 the comparable price was \$4.37 3/8.

#### Monthly Average Prices Canadian Coarse Grains and Flaxseed

	July 1946 <u>1/</u>	July 1947	May 1948	June 1948	July 1948
<u>OATS</u> <u>2/</u>	- cents and eighths per bushel -				
(1) Domestic and Producers					
2 C.W. ....	51/4	65	95/7	94/5	86/4
Ex. 3 C.W. ....	51/4	65	93/4	94	83/5
3 C.W. ....	51/4	65	93/2	93/2	83/4
Ex. 1 Feed ....	51/4	65	93	92/4	83/3
1 Feed ....	51/4	65	91/1	92/2	82
2 Feed ....	51/4	65	84/4	90/2	80
3 Feed ....	51/4	65	80/4	86/2	77/2
(2) Export-Schedule (1) plus equalization fees					
Equalization Fees - East	42/6	51/2	36	38/4	19/1
West	42/6	51/2	36	38/4	19/1
B.C.	42/1	51/2	36	38/4	19/1

1/ Plus an advance equalization payment for oats to producers of 10 cents per bu.

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



Monthly Average Prices, Canadian Coarse Grains and Flaxseed

	July 1946	July 1947	May 1948	June 1948	July 1948
<u>BARLEY</u> <sup>2/</sup> - cents and eighths per bushel -					
(1) Domestic and Producers					
1 C.W. Six-Row .....	64/6 <sup>1/</sup>	93	141/5	139/3	125
2 C.W. Six-Row .....	64/6 <sup>1/</sup>	93	141/5	139/3	125
3 C.W. Six-Row .....	64/6 <sup>1/</sup>	93	141/3	138/4	124/5
1 C.W. Two-Row .....	64/6 <sup>1/</sup>	93	138/2	139/3	124/6
2 C.W. Two-Row .....	64/6 <sup>1/</sup>	93	138/2	139/3	124/6
2 C.W. Yellow .....	-	93	134/2	133/4	124/1
3 C.W. Yellow .....	-	93	134/1	133/4	122/1
1 Feed .....	64/6 <sup>1/</sup>	93	118/3	117/5	119/2
2 Feed .....	64/6 <sup>1/</sup>	93	112	113/1	109/6
3 Feed .....	64/6 <sup>1/</sup>	93	106/6	108/5	105/3
(2) Export:- Schedule (1) plus equalization fees					
Equalization Fees - East .....	65	112/1	67/5	58/6	22/2
West .....	61	112/1	67/5	58/6	22/2
<u>RYE</u> <sup>2/</sup>					
(1) Domestic and Producers					
2 C.W. ....	292/4	360/6	447/5	277	234/3
3 C.W. ....	287/4	355/6	442/3	272	229/3
4 C.W. ....	227	295/1	406	-	145/4
Ergoty .....	209	266/2	386	-	135/4
Rejected 2 C.W. ....	219	291/1	406	-	140/4
(2) Export:- same as Schedule (1)					
<u>FLAXSEED</u> <sup>2/</sup>					
(1) Domestic and Producers					
(a) Domestic - to crushers					
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
(b) Producers <sup>3/</sup>					
1 C.W. ....	275	325	550	550	550
2 C.W. ....	271	321	545	545	545
3 C.W. ....	262	312	534	534	534
4 C.W. ....	258	308	525	525	525
(2) Export:- same as Schedule (1a)					
Equalization Fees - East .....			no quotations		
West .....			no quotations		

<sup>1/</sup> Plus an advance equalization payment for barley to producers of 20 cents per bushel.

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

<sup>3/</sup> Effective February 23, 1948 payment to producers was established at \$5.50 per bushel, retroactive to August 1, 1947.

Exports of Coarse Grains and Flaxseed - The following export statistics have been compiled by the Statistics Branch of the Board of Grain Commissioners:

Oversass Clearances Oats, Rolled Oats and Oatmeal, Barley, Rye and Flaxseed including United States Imports

	J U L Y		J U N E		AUGUST - JULY	
	Rolled Oats & Oatmeal 1/	Oats 2/	Rolled Oats & Oatmeal 1/	Oats 2/	Rolled Oats & Oatmeal 1/	Oats 2/
	bu.	bu.	bu.	bu.	bu.	bu.
<u>Oats, Rolled Oats &amp; Oatmeal</u>						
<u>BRITISH EMPIRE</u>						
United Kingdom	92,290	66,000	-	-	1,132,915	66,000
Eire	-	-	-	-	679,691	-
<u>Africa</u>						
Br. East Africa	-	-	-	-	273	-
Br. South Africa	4,533	-	3,151	-	31,582	-
Br. West Africa	4,157	-	42	-	4,853	-
Rhodesia	-	-	-	-	17,175	-
<u>Asia</u>						
Ceylon	-	-	-	-	1,503	-
Hong Kong	-	-	-	-	78,292	-
India	206	-	-	-	66,460	-
Malaya	406	-	310	-	10,485	-
Pakistan	612	-	-	-	1,357	-
Palestine	-	-	-	-	7,812	-
<u>Europe</u>						
Malta	-	-	-	-	1,272	-
<u>North America</u>						
Bahamas	-	-	121	-	1,042	1,997
Barbados	2,521	-	2,424	-	16,980	-
Bermuda	315	-	97	-	9,407	-
Br. Honduras	-	-	115	-	242	-
Jamaica	352	-	2,430	-	80,365	-
Trinidad-Tobago	1,073	-	3,758	-	14,231	-
Other Br. West Indies	3,188	-	2,970	-	30,316	-
Newfoundland	5,739	26,515	6,455	2,500	72,611	75,015
<u>South America</u>						
Br. Guiana	546	-	3,775	-	13,376	-
<u>TOTAL BRITISH EMPIRE</u>	<u>115,938</u>	<u>92,515</u>	<u>25,648</u>	<u>2,500</u>	<u>2,272,240</u>	<u>143,012</u>
<u>FOREIGN COUNTRIES</u>						
<u>Africa</u>						
Egypt	-	-	297	-	690	-
Portuguese Africa	-	-	-	-	254	-
<u>Asia</u>						
Burma	-	-	-	-	788	-
China	-	-	-	-	1,066	-
Iraq-Iran	-	-	-	-	109	-
Netherlands E. Indies	4,067	-	-	-	12,249	-
Philippine Islands	-	-	-	-	539	-
Portuguese Asia	-	-	-	-	552	-
Siam	-	-	-	-	447	-

Overseas Clearances Oats, Rolled Oats and Oatmeal, Barley, Rye and Flaxseed  
including United States Imports (continued)

	J U L Y		J U N E		AUGUST - JULY	
	Rolled Oats & Oatmeal 1/	Oats 2/	Rolled Oats & Oatmeal 1/	Oats 2/	Rolled Oats & Oatmeal 1/	Oats 2/
	bu.	bu.	bu.	bu.	bu.	bu.
<u>Europe</u>						
Austria	-	-	-	-	61,091	-
Belgium	-	263,197	60,607	-	476,074	1,225,552
Denmark	-	-	-	401,621	-	401,621
Greece	-	-	-	-	-	254,727
Germany	280,303	-	343,600	-	684,503	-
Iceland	-	-	-	-	187,781	-
Italy	-	-	-	-	607,770	-
Netherlands	-	953,784	-	199,127	-	1,161,815
Norway	-	-	-	-	-	357,232
Portugal	-	-	3,818	-	6,176	-
Switzerland	6,679	-	-	-	41,757	625,126
<u>North America</u>						
Costa Rica	1,243	-	-	-	1,601	-
Cuba	-	-	-	25,976	-	25,976
Dominican-Republic	4,382	-	491	-	9,601	-
Guatemala	-	-	2,224	-	4,538	-
Haiti	79	-	-	-	79	-
Panama	-	-	49	-	49	-
Salvador	-	-	-	-	1,515	-
St. Pierre-Miquelon	-	-	121	-	643	-
U.S.A. for Home Consumption 4/	-	3/	-	210,106	-	1,192,385
<u>South America</u>						
Brazil	364	-	-	-	19,910	-
Colombia	-	-	79	-	129,528	-
Ecuador	1,200	-	-	-	4,854	-
Netherlands Guiana	-	-	-	-	4,036	-
Peru	2,946	-	-	-	28,376	-
Venezuela	1,091	-	16,188	-	229,571	4,000
<b>TOTAL FOREIGN COUNTRIES</b>	<b>302,354</b>	<b>1,216,981</b>	<b>427,474</b>	<b>836,830</b>	<b>2,516,147</b>	<b>5,248,434</b>
<b>GRAND TOTAL EXPORTED</b>	<b>418,292</b>	<b>1,309,496</b>	<b>453,122</b>	<b>839,330</b>	<b>4,788,387</b>	<b>5,391,446</b>

	JULY 2/	JUNE 2/	AUGUST-JULY 2/
	bu.	bu.	bu.
<u>BARLEY</u>			
<u>BRITISH EMPIRE</u>			
<u>Europe</u>			
Malta	46,666	-	46,666
<u>FOREIGN COUNTRIES</u>			
<u>Europe</u>			
Belgium	114,789	-	140,070
France	-	-	4,988
Italy	-	55,380	68,270
Netherlands	835,438	269,822	1,105,260
Switzerland	14,000	-	14,000



Overseas Clearances Oats, Rolled Oats and Oatmeal, Barley, Rye and Flaxseed  
including United States Imports (concluded)

	JULY 2/	JUNE 2/	AUGUST-JULY 2/
	bu.	bu.	bu.
<u>BARLEY</u> (continued)			
<u>North America</u>			
Mexico	100,675	43,915	144,590
United States for home consumption 4/	3/	446,864	972,126
TOTAL FOREIGN COUNTRIES	1,064,902	815,981	2,449,304
GRAND TOTAL EXPORTED	1,111,568	815,981	2,495,970

RYE

FOREIGN COUNTRIES

<u>Europe</u>			
Belgium	-	-	2,205,157
Czechoslovakia	-	-	400,000
Denmark	-	-	361,478
France	-	-	3,131,184
Germany	-	-	65,000
Iceland	-	-	7,733
Italy	-	144,084	3,247,997
Netherlands	-	-	19,636
Norway	-	-	80,000
Switzerland	-	-	666,613
<u>North America</u>			
United States for home consumption 4/	3/	-	41,460
GRAND TOTAL EXPORTED	-	144,084	10,226,258

FLAXSEED

FOREIGN COUNTRIES

<u>Europe</u>			
Belgium	163,052	-	163,052
Netherlands	-	282,046	282,046
Norway	-	257,817	717,941
Poland	-	101,390	101,390
<u>North America</u>			
United States for home consumption 4/	3/	-	485,886
GRAND TOTAL EXPORTED	163,052	641,253	1,750,315

1/ Canadian Customs Return - Conversion rate 1 bushel oats = 16.5 lb. of rolled oats or Oatmeal.

2/ Subject to revision.

3/ United States Imports for July not available.

4/ Source - United States Department of Commerce - Bureau of the Census.

## UNITED STATES SITUATION

The following summary is reproduced from the July issue of 'The Feed Situation' published by the Bureau of Agricultural Economics, United States Department of Agriculture.

"Ample feed supplies are in prospect for 1948-49, on the basis of the very favourable condition of feed grains in early July. A record corn crop, over 3.3 billion bushels, is indicated and a large oats crop is being harvested. The corn crop is well advanced in most areas, and with a normal season this summer and fall, it should mature to at least average quality. The total production of the four feed grains is estimated to be 126.5 million tons, 30 million more than in 1947 and the largest on record.

If July 1 indications are realized, the supply of all feed concentrates (including byproduct feeds, production and stocks of feed grains, and the estimated quantities of wheat and rye to be fed) will be 16 per cent larger than in 1947-48 and close to the large war-time supplies of 1942-46. Much of the increase from 1947-48 is the result of the 28 per cent increase in the corn supply. Supplies of oats and barley are estimated to be larger than in 1947-48, and byproduct feed supplies may be about as large. With much larger supplies of feed grains, the quantity of wheat fed during the October-September feeding year is expected to be considerably smaller than during 1947-48.

The increase in feed supplies over last year will be especially pronounced in the North Central Region, where the prospective corn supply is up more than one-third. Larger production of corn in this area will result in much larger sales of corn by farmers in 1948-49 than in the present marketing year.

The hay supply of 110 million tons as estimated in July is about 7 per cent smaller than the large supply last year, but is expected to be ample for the fewer live stock on farms. Pastures were in about average condition on July 1.

Domestic disappearance of feed grains during April-June was 20 per cent smaller than a year earlier, and the smallest for that quarter since prewar. Corn disappearance was about one-fourth smaller than in the same months of 1947, and will continue small until the 1948 crop becomes available this fall. Stocks of corn on July 1 were down 36 per cent from a year earlier and the smallest since 1937.

Feed grain prices moved to lower levels during June and early July, influenced by the harvesting of the large oats and wheat crops and continued favourable prospects for corn. Prices of feed generally are expected to decline further this fall with the harvesting of the corn crop. The sharp increase in corn production this year is expected to result in a much greater than usual seasonal drop in corn prices from July to December. Currently corn prices are high in relation to other grains and wheat millfeeds."



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CALENDAR OF COARSE GRAIN EVENTS

- July 9 The Rt. Hon. C. D. Howe, Minister of Trade and Commerce, announced that the Government will pay 5 cents per bushel on oats and 11 cents per bushel on barley delivered and sold by western producers between August 1 and October 21, 1947, when price ceilings on these grains were removed.
- 21 The Canadian Wheat Board announced that there would be no delivery quotas on rye and flaxseed in the crop year 1948-49. Delivery quotas on wheat, oats and barley will be left open until new crop deliveries and shipments reach such a volume as to make necessary the establishment of local delivery quotas from one or more of these grains.
- 22 The preliminary estimate of crop acreages issued by the Dominion Bureau of Statistics placed the Canadian acreage of all wheat at 24.1 million acres, oats at 11.1 million acres, barley 6.5 million acres, all rye at 2.0 million acres and flaxseed at 1.9 million acres.
- 25 The Board of Grain Commissioners announced that elevation charges on wheat, barley, rye and corn were increased to 2 1/2 cents per bushel and that storage charges were increased from 1/30 of a cent to 1/25 of a cent per bushel. Elevation charges on oats were increased to 1 7/8 cents per bushel and on flaxseed to 4 1/2 cents per bushel.
- 30 The expiry date on export permits for both oats and barley was extended to October 1, 1948.
- August 2 Equalization fees formerly charged on the export of oats and barley were discontinued but export permits for these grains are still required.
- The Canadian Wheat Board increased the price of feed wheat by 46 1/2 cents per bushel or \$15.50 per ton.
- The continuation of support prices on oats and barley was announced by the Canadian Wheat Board. For most grades there were slight increases over the support prices announced on March 17, 1947.
- 4 The Winnipeg Grain Exchange announced the resumption of trading in cash flaxseed and flaxseed futures on August 16.
- 10 The August 1st official estimate by the United States Department of Agriculture places the 1948 production of U.S. grain at the following figures (millions of bushels): corn 3,506; all wheat 1,284; oats 1,470; barley 313; rye 27; flaxseed 45.
- 17 Canada's 1948 grain production in millions of bushels as estimated by the Dominion Bureau of Statistics, is as follows: all wheat 372; oats 338; barley 146; all rye 26; flaxseed 18.
- 19 Carry-over stocks of Canadian grain in all positions at July 31, 1948, according to the Dominion Bureau of Statistics, were, in millions of bushels, wheat 76.0; oats 47.2; barley 31.1; rye 0.7 and flaxseed 3.3.
- 27 The Canadian Wheat Board announced that, effective August 30, 1948 the delivery quota on wheat, oats and barley would be 10 bushels per seeded acre, except at specified delivery points.