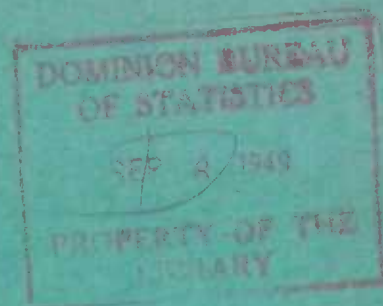


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CANADIAN COARSE GRAINS

QUARTERLY REVIEW

AUGUST, 1949



DOMINION BUREAU OF STATISTICS
DEPARTMENT OF TRADE AND COMMERCE

CANADIAN COARSE GRAINS
QUARTERLY REVIEW

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CANADIAN COARSE GRAINS - QUARTERLY REVIEW

AUGUST 1949

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THE FEED SITUATION IN CANADA

The 1948-49 Feed Situation - Feed supplies in the crop year ended July 31, 1949 were adequate to meet domestic requirements and to leave substantial quantities for export and carry-over. The 1948 production of all major grains exceeded that of 1947, with available supplies of oats and barley exceeding the 1947-48 totals by 59 million and 16 million bushels respectively. Export restrictions on coarse grains were removed at the beginning of the crop year in view of the improved feed situation in prospect at that time. Although marked increases in exports offset to some extent the larger available supplies, the 1948-49 domestic disappearance of oats increased by 35 million bushels while that of barley remained at the same level as in 1947-48.

The improved feed grain supply situation in eastern Canada during the past crop year resulted in reduced quantities of feed grains moving into this area from the Prairie Provinces under the Freight Assistance Plan. Preliminary claims filed for payment indicate that freight-assisted shipments of feed wheat, oats and barley during the first eleven months of 1948-49 were approximately 30 million bushels below the corresponding period of 1947-48. While the amount of the actual decrease in freight-assisted shipments will not be available for some months, it is quite evident that 1948-49 shipments will be well below the 1947-48 total of almost 119 million bushels of wheat, oats and barley.

Although the total supply of oats in 1948-49 was 73 million bushels below the average for the previous ten years, it should be noted that supplies in three of those years, 1942-43 to 1944-45, exceeded 600 million bushels, an abnormally high level for Canada. Domestic disappearance of oats during 1948-49 was also below the ten-year average but was well above the 1947-48 level despite increases in exports and year-end carry-over stocks. In view of the decline in live-stock numbers in recent years, 1948-49 supplies of oats were much more favourable than is indicated by comparisons of absolute quantities.

Supply and Disposition of Canadian Oats, 1938-39 to 1948-49 and Estimated Supply, 1949-50

Crop Year	Supply			Disposition		
	Carry-over at Beginning	Production	Total Supply	Exports	Domestic Disappearance	Carry-over at End
			<u>1/</u>	<u>2/</u>	<u>3/</u>	
- million bushels -						
1938-39	19	371	394	13	332	49
1939-40	49	384	433	24	362	47
1940-41	47	380	427	14	372	41
1941-42	41	306	347	12	306	29
1942-43	29	652	681	63	469	149
1943-44	149	482	631	75	448	108
1944-45	108	500	608	86	424	98
1945-46	98	382	480	44	359	77
1946-47	77	371	448	30	349	69
1947-48	69	279	348	10	290	48
10-year average						
1938-39-1947-48	69	411	480	37	371	72
1948-49 <u>4/</u>	48	359	407	23	325	59
1949-50 <u>4/</u>	59	317 <u>5/</u>	376			

1/ Includes imports which are normally quite small.

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

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

4/ Subject to revision.

5/ Based on first estimate of production.

With carry-over stocks and production in excess of both 1947-48 and the ten-year average, total supplies of barley in Canada during 1948-49 amounted to 186 million bushels. Despite an increase of 18 million bushels in exports over the comparatively low 1947-48 total, domestic disappearance of barley in 1948-49 remained at 136 million bushels, the same as for the previous crop year. Year-end carry-over stocks, however were down by 2 million bushels.

Supply and Disposition of Canadian Barley, 1938-39 to 1948-49
and Estimated Supply, 1949-50

Crop Year	Supply			Disposition		
	Carry-over	Production	Total	Exports	Domestic	Carry-over
	at Beginning		Supply		Disappearance	at End
			<u>1/</u>		<u>2/</u>	

- million bushels -						
1938-39	7	102	109	16	80	13
1939-40	13	103	116	11	92	13
1940-41	13	104	117	3	103	11
1941-42	11	110	121	2	108	11
1942-43	11	259	270	34	167	69
1943-44	69	216	285	36	203	46
1944-45	46	195	241	39	173	29
1945-46	29	158	187	4	153	30
1946-47	30	149	179	7	143	29
1947-48	29	141	170	3	136	31
10 year average						
1938-39-1947-48	26	153	179	15	136	28
1948-49 3/	31	155	186	21	136	29
1949-50 3/	29	127 4/	156			

1/ Includes imports which are normally quite small.

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

3/ Subject to revision.

4/ Based on first estimate of production.

Supplies of both rye and flaxseed were more than adequate to meet domestic and export requirements, with the result that year-end carry-over stocks were at very high levels. Stocks of rye at July 31 were 12 million bushels, the third largest on record, while flaxseed stocks at 10.7 million bushels reached an all-time high.

The Outlook for 1949-50 - Current indications are that supplies of both feed grains and fodder in 1949-50 will be somewhat below the 1948-49 levels. The first estimate of production released by the Dominion Bureau of Statistics on August 16 placed the probable outturn of oats at 317.3 million bushels and barley at 126.5 million bushels. Since these estimates were based on conditions at July 31, when harvesting of spring grains had not yet become general in the major producing areas, they may be subject to considerable revision as the harvesting season progresses.

Lack of adequate rainfall over fairly large sections of Alberta, Saskatchewan and Ontario during the critical germination and growing periods reduced yields considerably in the more seriously affected areas. Yields of spring grains in many sections of Ontario, however, were considerably above earlier

expectations and the results of actual harvesting operations in western Canada could change the over-all situation considerably. Based on the August estimate of production, 1948-49 supplies of oats and barley would be 376 million and 156 million bushels respectively. The second estimate of Canada's 1949 grain production will be released on September 15, when a more up-to-date picture of potential feed supplies for the current crop year will be available.

Prospective fodder supplies for 1949-50 are well below those of 1948-49. In the first production estimate, the outturn of hay and clover was placed at 11.9 million tons compared with 16.1 million tons last year. Lack of adequate pasture has necessitated supplementary feeding of many dairy herds, thus reducing feed supplies intended for the coming winter. In addition, many farmers pastured fields of alfalfa and clover intended for second cutting and this will further decrease winter fodder supplies. One compensating factor, particularly in Ontario, is the generally excellent fodder corn crop which will help to improve the feed situation on many dairy farms.

CURRENT POLICY

Canadian Wheat Board Undertakes the Marketing of Western Oats and Barley -

On June 1, 1949 the Rt. Hon. C.D. Howe, Minister of Trade and Commerce, announced that the government intended to authorize the Canadian Wheat Board to undertake the marketing of western Canadian oats and barley delivered by producers during the 1949-50 crop year. This policy was authorized by an amendment to the Canadian Wheat Board Act, passed by Parliament during the 1948 session. It was subsequently indicated by Mr. Howe that the Canadian Wheat Board would be authorized to undertake the marketing of oats and barley on condition that the governments of the Prairie Provinces would indicate their support by passing complementary legislation. The necessary complementary legislation was passed by the Saskatchewan legislature in 1948 and by the Alberta and Manitoba legislatures in 1949.

On July 20, 1949 an official press release gave the major details of the new marketing procedure for oats and barley grown in western Canada. The complete text of the release follows:

"Effective August 1, 1949, oats and barley produced in the three Prairie Provinces will be marketed through an oats pool and a barley pool operated by the Canadian Wheat Board, it was announced today by the Right Honourable C. D. Howe, Minister of Trade and Commerce.

Initial payments will be made on the basis of the 1949-50 support prices announced by the Dominion Government on March 15, 1949, less all charges before delivery in store Fort William or Port Arthur. The 1949-50 support prices announced last March were 61 1/2 cents for oats and 90 cents for barley basis No. 1 Feed grades in store Fort William or Port Arthur.

In explaining the adjustments to be made in determining the new initial payments Mr. Howe pointed out that deductions would include an allowance of 1 1/2 cents per bushel on oats and 3 cents per bushel on barley, this to constitute a reserve against country carrying charges and pool operating expenses to the Lakehead. Mr. Howe said that total deductions under the pool system including the reserve of 1 1/2 cents for oats and 3 cents for barley would be about equivalent to deductions which have been made at country elevators under the price support policy.

The Dominion Government guarantees a minimum return to the oats and barley pools of 61 1/2 cents for oats and 90 cents for barley on the basis of

No. 1 Feed grades in store Fort William or Port Arthur for the total handling of the pools.

The Canadian Wheat Board will establish related initial payments for other grades of western oats and barley and these will be announced before the end of July. These will include initial payments for the basic grades of oats and barley set forth in Section IV(a) of the Canadian Wheat Board Act. These basic grades are for oats, Grade No. 2 Canada Western for which the initial payment will be 65 cents per bushel basis in store Fort William or Port Arthur, after deduction of the allowance; and for barley, Grade No. 3 Canada Western Six-Row, for which the initial payment will be 93 cents per bushel on the same basis.

Producers will receive the established initial payments at the time of delivery and sale of their oats and barley to the Board. At the same time they will receive a producer's certificate covering the quantities and grades so delivered and sold, which entitles producers to share in any surpluses accumulated by the Board in the sale of oats and barley delivered to the Board between August 1, 1949, and July 31, 1950.

Mr. Howe stated that both the Government and the Board had given consideration to the manner in which selection premiums would be paid to producers for special qualities of western oats and barley. It has been decided that the Board will purchase oats and barley on the basis of initial payments applicable to the established grades and that special quality premiums will be reflected to producers by handling companies in the same manner as in the past. The producer should therefore make his own arrangements with the handling companies for malting and other premiums, the Canadian Wheat Board being responsible only for the basic grade price.

Mr. Howe said that the Canadian Wheat Board would shortly be announcing further plans in respect to the handling of oats and barley in 1949-50, but in general it is the intention of the Board to use existing facilities for the distribution of these grains.

On August 1, 1949 parts III and IV of the Canadian Wheat Board Act will be brought into force by the Canadian Wheat Board Regulations approved by the Governor in Council. The authorities in the three Prairie Provinces will be consulted with a view to having their Acts proclaimed.

With regard to flaxseed, the Government has asked the Canadian Wheat Board to conduct a voluntary pooling operation during 1949-50. The initial payment will be \$2.50 per bushel basis No. 1 C.W. flaxseed in store Fort William or Port Arthur with appropriate prices for lower grades. The Board is already carrying substantial stocks of flaxseed from 1948-49 operations and the Government has asked the Board to give sales priority to any 1949-50 Board flax receipts. It is not known at this time whether or not an alternative flaxseed market will be provided in Winnipeg."

Sales Procedures for Oats and Barley - In respect to the sale of oats and barley, the Canadian Wheat Board issued the following statement to the trade on August 4, 1949:

"At this time the Board has the following comments to make in regard to the sale of oats and barley:

- (1) The Board intends to sell oats and barley freely and to the best advantage, using the methods which suit these purposes;
- (2) The Board will sell oats and barley to dealers and others for distribution to users of these grains;

- (3) The Board recognizes that there are stocks of old crop oats and barley in Canada which are not the property of the Board and which are in the process of being marketed by the present holders.

With these considerations in mind, the Board will use the sales procedures which it considers desirable and advantageous. The Board will use the futures market in the selling of oats and barley. At the same time, the Board is prepared to make outright sales of oats and barley in store Fort William-Port Arthur where buyers wish to purchase on this basis. To give effect to this policy, the Board will quote prices for principal grades of oats and barley basis in store Fort William-Port Arthur. The Board will also establish prices for oats and barley for sale at country points in Western Canada and for shipment to British Columbia. These Board sale prices will be on a Fort William-Port Arthur basis.

It will be appreciated that the Board is concerned only with oats and barley delivered by producers on and after August 1, 1949. It will therefore be several weeks before the Board has stocks of oats and barley available at the Lakehead. However, the Board is prepared to sell limited quantities of cash oats and barley for delivery at the Lakehead in forward positions and the Board will also sell futures."

Flaxseed Marketing Procedure - Western Canada producers of flaxseed have the option of marketing their product in 1949-50 through the voluntary producers' pool operated by the Wheat Board, with an initial payment of \$2.50 per bushel basis No. 1 C.W. in store Fort William-Port Arthur, or selling on the open market. Trading in flax futures resumed on the Winnipeg Grain Exchange on August 29 with quotations for October and December deliveries closing at \$3.40 1/2 and \$3.37 per bushel, respectively.

Fixed Minimum Carlot Prices Announced by Canadian Wheat Board - On July 28, 1949 the Canadian Wheat Board released its 1949-50 schedules of fixed minimum carlot prices for oats, barley and flaxseed, basis in store Fort William-Port Arthur. Prices of oats and barley are based on the support prices announced on March 15, with deductions of one and one-half cents per bushel for oats and three cents per bushel for barley to constitute a reserve against country carrying charges and pool operating expenses to the Lakehead. In the case of flaxseed, the price of No. 1 C.W. flaxseed was fixed at \$2.50 per bushel by Order in Council No. 3713, dated July 20, 1949 and the remaining prices were fixed by the Board in relation to the price of No. 1 C.W.

Price List for Canada Western Oats, Barley and Flaxseed, 1949-50
In Carload Lots, Basis in Store Fort William-Port Arthur

Oats		Barley		Flaxseed	
Grade	Price Per Bu.	Grade	Price Per Bu.	Grade	Price Per Bu.
	\$		\$		\$
2 C.W.	65	1 C.W. 6-Row	95	1 C.W.	2.50
Ex. 3 C.W.	62	2 C.W. 6-Row	95	2 C.W.	2.45
3 C.W.	62	3 C.W. 6-Row	93	3 C.W.	2.35
Ex. 1 Feed	62	1 C.W. 2-Row	93	4 C.W.	2.28
1 Feed	60	2 C.W. 2-Row	93	Tough 1 C.W. ..	2.42
2 Feed	55	1 Feed	87	Tough 2 C.W. ..	2.37
3 Feed	50	2 Feed	83	Tough 3 C.W. ..	2.25
		3 Feed	79	Tough 4 C.W. ..	2.18

ACREAGE AND FIRST ESTIMATE OF 1949 PRODUCTION OF CANADA'S PRINCIPAL FIELD CROPS

Production of Canada's principal field crops in 1949 as estimated by the Dominion Bureau of Statistics on August 16, will be below that of 1948. Marked declines in acreages, particularly in rye and flaxseed, have been a major contributing factor in decreased production prospects for some crops. Lower average yields, however, have affected the anticipated outturns of all crops and have more than offset acreage increases in spring wheat and oats.

Canada's 1948 wheat crop is estimated at 391.5 million bushels, only 1.8 million bushels below last year's outturn but about 18.6 million below the ten-year (1939-48) average production. In the Prairie Provinces the wheat crop is expected to yield 362 million bushels, one million bushels less than in 1948. Production of wheat in the remainder of Canada is placed at 29.5 million bushels, of which Ontario fall wheat accounts for 24.2 million.

Present prospects indicate decreases in the production of both oats and barley, Canada's principal feed grains. Production of oats is estimated at 317.3 million bushels, a reduction of 41.5 million from 1948. Barley production, currently estimated at 126.5 million bushels, is down 28.5 million bushels from the 1948 level. Sharp decreases in acreage, combined with lower anticipated average yields than in 1948, have lowered the expected outturns of rye and flaxseed to 9.9 million and 2.5 million bushels, respectively. Production of hay and clover and the first cutting of alfalfa is also down from 1948, due largely to late frosts and lack of rainfall over many of the major producing areas during June.

August Estimate of the 1949 Production of Principal Field Crops in Canada, Compared with Revised Data for 1948

Crop	Area		Yield Per Acre		Production	
	1948	1949	1948	1949	1948	1949
	acres	acres	bu.	bu.	bu.	bu.
CANADA						
Fall Wheat ...	858,500	805,000	30.3	30.0	26,013,000	24,150,000
Spring Wheat .	23,247,400	26,733,600	15.8	13.7	367,332,000	367,355,000
All Wheat ..	24,105,900	27,538,600	16.3	14.2	393,345,000	391,505,000
Oats	11,200,500	11,288,900	32.0	28.1	358,807,000	317,319,000
Barley	6,495,300	6,040,300	23.9	20.9	155,018,000	126,517,000
Fall Rye	1,605,900	873,000	12.4	8.0	19,876,000	6,990,000
Spring Rye ...	497,200	308,000	11.0	9.4	5,464,000	2,889,000
All Rye	2,103,100	1,181,000	12.0	8.4	25,340,000	9,879,000
Flaxseed	1,876,500	321,100	9.4	7.9	17,683,000	2,525,000
			tons	tons	tons	tons
Hay and Clover	9,748,000	9,573,200	1.65	1.24	16,073,000	11,884,000
Alfalfa (first cutting)	1,317,300	1,466,600	1.73	1.29	2,280,000	1,888,000
PRAIRIE PROVINCES						
			bu.	bu.	bu.	bu.
Wheat	23,045,000	26,490,000	15.8	13.7	363,000,000	362,000,000
Oats	7,535,000	7,339,000	29.7	27.3	224,000,000	200,000,000
Barley	6,082,000	5,617,000	23.3	20.5	142,000,000	115,000,000
Rye	1,965,000	1,061,100	11.4	7.1	22,350,000	7,560,000
Flaxseed	1,810,000	303,500	9.3	7.7	16,830,000	2,330,000

FARMERS' MARKETINGS

Total marketings of oats, barley, rye and flaxseed in the Prairie Provinces during 1948-49 amounted to 185.6 million bushels, an increase of 27.5 million over the 1947-48 total of 158.1 million bushels. With the 1948 production of each of the four grains exceeding that of the previous year and with farmers maintaining delivery rates (expressed as a percentage of production) at approximately the same levels as in 1947-48, deliveries of all grains during the crop year ending July 31, 1949 were well above the previous year's totals.

Deliveries of oats, at 83.7 million bushels, were 11.2 million bushels above the 1947-48 total while barley marketings, at 69.1 million bushels, exceeded the previous year's by 4.2 million. The greatest proportional increases, however, occurred in deliveries of rye and flaxseed, with 1948-49 marketings exceeding the 1947-48 totals by approximately 73 and 45 per cent, respectively. During the 1948-49 crop year Saskatchewan led in deliveries of oats and barley, Alberta in rye and Manitoba in flaxseed.

Farmers' Marketings of Coarse Grains in the Prairie Provinces, August 1, 1948 to July 31, 1949

(Source: Statistics Branch, Board of Grain Commissioners)

	O A T S		B A R L E Y	
	Bushels	% 1948 Crop	Bushels	% 1948 Crop
Manitoba	20,221,914	33.7	23,004,856	51.1
Saskatchewan	37,912,308	42.6	23,233,143	55.3
Alberta	25,582,761	34.1	22,887,045	41.6
T o t a l	83,716,983	37.4	69,125,044	48.7
Same Period in 1947-48	72,530,760	37.4	64,926,907	49.6

	R Y E		F L A X S E E D	
	Bushels	% 1948 Crop	Bushels	% 1948 Crop
Manitoba	1,518,189	77.9	8,079,812	89.4
Saskatchewan	7,977,146	76.0	4,404,932	92.9
Alberta	8,020,786	81.0	2,750,485	90.2
T o t a l	17,516,121	78.4	15,235,229	90.5
Same Period in 1947-48	10,140,144	87.1	10,487,224	90.8

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>							
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
1947	7,898,000	24.6	194,000,000	39,812,000	233,812,000	72,530,760	31.0
5-year average ...	9,881,080	29.9	295,460,000	59,808,800	355,268,800	111,933,383	31.5
1948	7,535,000	29.7	224,000,000	32,000,000	256,000,000	83,716,983 ^{4/}	32.7
<u>BARLEY</u>							
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
1947	7,035,000	18.6	131,000,000	15,453,000	146,453,000	64,926,907	44.3
5-year average ...	6,870,080	23.0	158,280,000	21,705,600	179,985,600	72,312,555	40.2
1948	6,082,000	23.3	142,000,000	17,000,000	159,000,000	69,125,044 ^{4/}	43.5
<u>RYE</u>							
1943	496,100	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	7,276,000	215,400	7,493,400	5,577,317	74.4
1947	1,072,000	10.8	11,630,000	212,000	11,842,000	10,140,144 ^{5/}	85.6
5-year average ...	638,730	11.4	7,272,600	1,578,480	8,851,080	5,518,771	62.4
1948	1,965,000	11.4	22,350,000	275,000	22,625,000	17,516,121 ^{4/}	77.4
<u>FLAXSEED</u>							
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
1947	1,513,000	7.6	11,550,000	436,000	11,986,000	10,487,224	87.5
5-year average	1,516,780	6.9	10,420,200	604,000	11,024,200	8,319,479	75.5
1948	1,810,000	9.3	16,830,000	295,000	17,125,000	15,235,229 ^{4/}	89.0

1/ Includes Peace River Block in British Columbia.

2/ Stocks at end of July.

3/ August 1 to July 31, 1943-44 to 1947-48.

4/ August 1, 1948 to July 31, 1949.

5/ Includes some Rye imported from U.S.A.

CARRY-OVER STOCKS OF CANADIAN GRAIN AT JULY 31, 1949

With the exception of barley, stocks of Canadian grains in all positions at July 31, 1949 were well above the totals at the end of the 1947-48 crop year. Total stocks of Canadian wheat at the end of the 1948-49 crop year were 98.7 million bushels, an increase of 21.0 million over the July 31, 1948 revised carry-over total of 77.7 million bushels. Carry-over stocks of wheat are still at a relatively low level, however, when compared with the average of 205.3 million bushels for the past twenty years (1929-48).

Total stocks of Canadian oats on July 31 were 59.1 million bushels, of which 48.4 million were held on farms. Last year's total oat stocks were 47.9 million bushels with 37.6 million in farmers' hands. Barley stocks in all positions this year amounted to 29.0 million bushels, of which 18.5 million were on farms. Comparable figures for July 31, 1948 were 31.4 million and 17.4 million bushels, respectively. No Canadian oats and only 112,000 bushels of Canadian barley were held in United States positions at July 31 this year. Sharp increases have occurred in this year's carry-over stocks of both rye and flaxseed. On July 31, 1949 rye stocks were almost 12 million bushels as against 0.9 million a year ago while flaxseed stocks of 10.7 million bushels were more than three times last year's carry-over stocks of 3.4 million bushels.

Position of Canadian Grain Stocks July 31, 1949 ^{1/}

	Wheat	Oats	Barley	Rye	Flaxseed
- bushels -					
<u>In Canada</u>					
On Farms	42,423,000	48,363,000	18,482,000	4,187,000	191,000
Country Elevators	14,372,583	3,020,899	2,298,719	1,760,063	141,113
Int.Private & Mill Elevs..	3,036,840	664,945	1,838,276	15,630	11,294
Interior Terminal Elevs. .	61,768	3,889	267,565	14,219	11,870
Vancouver-New Westminster.	5,411,004	117,682	14,845	38,509	246
Victoria and Prince Rupert	-	-	-	-	-
Churchill	1,205,444	186	-	-	-
Fort William-Port Arthur .	3,478,716	1,511,418	2,326,232	2,858,688	5,891,137
In Transit - Lakes	1,816,809	346,554	701,597	116,889	-
In Transit - Rail	6,257,443	2,141,493	1,273,842	484,236	188,144
Eastern Elevators	18,854,040	2,329,413	1,380,955	1,752,871	4,275,876
Eastern Mills	1,550,400	389,800	197,200	-	-
Western Mills	178,800	186,200	70,300	1,400	-
Total in Canada	98,646,847	59,075,479	28,851,531	11,229,505	10,710,680
Canadian Grain in U.S.A. .	68,494	-	112,344	728,026	-
Total Canadian Grain in Canada and United States.	98,715,341	59,075,479	28,963,875	11,957,531	10,710,680
<u>Comparative Stocks, July 31, 1948 ^{2/}</u>					
In Canada	77,675,758	47,065,974	31,153,555	903,746	3,371,226
In United States	34,652	825,085	295,905	-	-
Total in Canada and United States	77,710,410	47,891,059	31,449,460	903,746	3,371,226

^{1/} Subject to revision.

^{2/} Revised.

Stocks on Farms - In view of current prospects for reduced production of Canadian coarse grains, the carry-over stocks, particularly on farms, are of considerable importance in any attempt at assessing the feed situation for the 1949-50 crop year. While wheat normally constitutes a relatively small proportion of Canadian feed grain supplies, it must be taken into consideration as a potential reserve. Farm stocks of wheat at July 31, 1949 were 42.4 million bushels, an increase of 3.3 million bushels over the corresponding total at the end of 1947-48. Approximately 43 per cent of the total wheat stocks at July 31, 1949 was held on farms.

Farm-held stocks of oats at 48.4 million bushels were 10.8 million bushels above the 1948 level and should help to offset the anticipated decrease in this year's crop. Barley stocks, however, were only 1.1 million bushels above last year's carry-over. Stocks of rye on farms were 4.2 million bushels, in marked contrast to last year's 276,000 bushels. Farm-held stocks of flaxseed were at a very low level as farmers marketed practically all available supplies prior to the expiry of the \$4.00 per bushel support price on July 31.

Farm Stocks of Grain in Canada, July 31, 1949

	Wheat	Oats	Barley	Rye	Flaxseed
- 000 bushels -					
Prince Edward Island .	5	460	15	-	-
Nova Scotia	-	196	13	-	-
New Brunswick	-	640	7	-	-
Quebec	10	2,023	117	4	-
Ontario	1,359	6,906	311	83	-
Manitoba	2,000	5,000	3,000	300	30
Saskatchewan	24,000	18,000	6,000	2,500	105
Alberta	15,000	15,000	9,000	1,300	56
British Columbia	49	138	19	-	-
Total - Canada	42,423	48,363	18,482	4,187	191
July 31, 1948	39,162	37,593	17,373	276	295

Since the bulk of farm stocks of grain is held in western Canada, stocks in the Prairie Provinces, have been segregated from the above table for ease in comparison with last year's totals. It will be noted that increases have taken place in this year's totals for all grains except flaxseed in the Prairie Provinces. With the exception of wheat stocks in Manitoba, carry-over stocks of wheat, oats, barley and rye in each of the Prairie Provinces either equalled or exceeded those of July 31, 1948.

Farm Stocks of Grain in the Prairie Provinces, July 31, 1949

	Wheat	Oats	Barley	Rye	Flaxseed
- bushels -					
Manitoba	2,000,000	5,000,000	3,000,000	300,000	30,000
Saskatchewan	24,000,000	18,000,000	6,000,000	2,500,000	105,000
Alberta	15,000,000	15,000,000	9,000,000	1,300,000	56,000
Prairie Provinces	41,000,000	38,000,000	18,000,000	4,100,000	191,000
July 31, 1948	38,000,000	32,000,000	17,000,000	275,000	295,000

CARRY-OVER OF CANADIAN COARSE GRAIN AND FLAXSEED, JULY 31, 1924-49

Carry-over stocks at the end of crop year 1948-49 have showed a marked increase over the July 31, 1948 totals for all coarse grains with the exception of barley. Stocks of oats on July 31, 1949 at 59.1 million bushels, were 11.2 million more than last year's total of 47.9 million or an increase of 23 per cent. Compared with the 25-year average carry-over of 49.7 million bushels, stocks of oats were 9.3 million greater on July 31 this year, an increase of 19 per cent. The 1948-49 carry-over stocks of oats, however, were down 90.2 million from the record carry-over stocks of 149.3 million bushels in 1943.

Barley stocks of 29.0 million bushels were down 2.4 million from last year, but were considerably above those of the 25-year average of 17.4 million. Rye stocks for July 31 of 12.0 million bushels were the third highest on record during the last twenty-five years and approximately 13 times those of July 31, 1948, when rye stocks were down to .9 million bushels. Stocks of flaxseed at 10.7 million bushels reached an all-time high for the last twenty-five years and were 7.3 million above those of a year ago when carry-over stocks were 3.4 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, 1924-49

Year	Oats	Barley	Rye	Flaxseed
- 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>	69,483,926	28,764,387	755,163	796,918
1948 <u>1/</u>	47,891,059	31,449,460	903,746	3,371,226
25-year average 1924-48 ...	49,734,789	17,410,239	4,124,558	1,307,459
1949 <u>2/</u>	59,075,479	28,963,875	11,957,531	10,710,680

1/ Revised. 2/ Preliminary.

Visible Supply of Canadian Oats, August 11, 1949 Compared with
Approximately the Same Date, 1948 and 1947

	1949	1948	1947
	- 000 bushels -		
Country Elevators - Manitoba	848	340	755
Saskatchewan	1,480	764	2,290
Alberta	523	319	1,155
T o t a l	2,851	1,423	4,200
Interior Private and Mill Elevators	658	770	1,416
Interior Terminals	9	81	281
Vancouver-New Westminster	88	221	451
Churchill	-	1	-
Fort William and Port Arthur	2,026	2,165	2,794
In Transit - Rail (Western Division)	2,070	548	927
Eastern Elevators - Lake Ports	2,374	1,597	2,936
St. Lawrence and Seaboard Ports	196	506	446
In Transit - Lake	301	327	366
In Transit - Rail (Eastern Division)	59	26	-
United States Ports	-	825	-
In Transit - U.S.A.	-	-	72
T o t a l	10,632	8,490	13,889

Visible Supply of Canadian Barley, August 11, 1949 Compared with
Approximately the Same Date, 1948 and 1947

	1949	1948	1947
	- 000 bushels -		
Country Elevators - Manitoba	909	434	1,010
Saskatchewan	901	655	1,840
Alberta	831	479	805
T o t a l	2,641	1,568	3,655
Interior Private and Mill Elevators	1,888	2,135	2,647
Interior Terminals	258	323	158
Vancouver-New Westminster	6	121	54
Fort William and Port Arthur	2,346	3,621	1,863
In Transit- Rail (Western Division)	955	499	637
Eastern Elevators - Lake Ports	788	2,096	2,045
St. Lawrence and Seaboard Ports	238	866	322
In Transit - Lake	1,112	1,088	103
In Transit - Rail (Eastern Division)	16	20	-
United States Ports	-	229	-
T o t a l	10,248	12,566	11,484

Visible Supply of Canadian Rye, August 11, 1949 Compared with
Approximately the same Date, 1948 and 1947

	1949	1948	1947
- 000 bushels -			
Country Elevators - Manitoba	185	7	11
Saskatchewan	849	330	501
Alberta	762	74	154
T o t a l	1,796	411	666
Interior Private and Mill Elevators	13	26	14
Interior Terminals	14	-	-
Vancouver-New Westminster	44	-	-
Fort William and Port Arthur	3,150	88	125
In Transit - Rail (Western Division)	399	97	237
Eastern Elevators - Lake Ports	611	5	65
St. Lawrence and Seaboard Ports	1,259	2	121
In Transit - Rail (Eastern Division)	-	-	58
United States Ports	728	-	13
T o t a l	8,014	629	1,299

Visible Supply of Canadian Flaxseed, August 11, 1949 Compared with
Approximately the Same Date, 1948 and 1947

	1949	1948	1947
- 000 bushels -			
Country Elevators - Manitoba	-	116	16
Saskatchewan	15	291	102
Alberta	5	127	34
T o t a l	20	534	152
Interior Private and Mill Elevators	28	49	12
Interior Terminals	1	31	1
Fort William and Port Arthur	6,049	1,316	162
In Transit - Rail (Western Division)	96	285	14
Eastern Elevators - Lake Ports	3,289	526	39
St. Lawrence and Seaboard Ports	744	303	-
In Transit - Lake	78	122	-
T o t a l	10,305	3,166	380

RAIL MOVEMENT FROM FORT WILLIAM--PORT ARTHUR

Total rail movement of wheat, oats, barley and rye from the lakehead during 1948-49 amounted to 42.4 million bushels, an increase of approximately 28 per cent over the previous crop year's total of 33.2 million bushels. Wheat, oats and barley moved in greater volume during 1948-49 but rye shipments, normally accounting for only a small part of the total, dropped sharply.

Following the usual seasonal pattern, rail shipments from the lakehead were heaviest when navigation was closed. Approximately 65 per cent of the 1948-49 crop year's total moved during the December-March period, with peak shipments of all grains except rye occurring in January. Rail movement tapered off in April, following the opening of navigation but shipments of oats continued in fairly substantial volume up to the end of the crop year.

Rail Shipments of Canadian Grain from Fort William-Port Arthur August-July 1948-49 and 1947-48

	Wheat	Oats	Barley	Rye
- bushels -				
<u>1948-49</u>				
August	51,283	890,903	487,304	3,000
September	30,017	580,249	327,166	2,000
October	46,274	956,304	708,458	9,000
November	138,600	638,379	451,113	-
December	1,740,405	1,896,025	1,564,776	-
January	3,794,390	3,682,566	1,927,479	58,643
February	3,720,733	2,114,026	1,199,113	25,665
March	1,510,905	2,515,714	1,560,537	29,234
April	659,467	1,219,096	763,419	15,000
May	884,171	1,677,798	725,081	15,500
June	330,348	1,138,692	309,945	85,100
July	469,796	1,181,764	236,430	-
T o t a l	13,376,389	18,491,516	10,260,821	243,142
<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

LAKE SHIPMENTS OF CANADIAN GRAIN

Lake shipments of the five major grains from Fort William-Port Arthur from the opening of navigation to July 31, 1949 amounted to 107.7 million bushels, an increase of 41.5 million bushels over the comparable period of 1948. Wheat shipments, at 71.6 million bushels, accounted for 67 per cent of this year's total to date while shipments of oats and barley amounted to 12.4 million and 13.1 million bushels respectively. Lake shipments of rye and flaxseed, at 5.8 million and 4.8 million bushels respectively, were the highest during the eleven-year period under review.

Lake Shipments of Canadian Grain from the Opening of Navigation to July 31, 1949 and to Approximately the same Date, 1939 to 1948

	Wheat	Oats	Barley	Rye	Flaxseed	Total
	- bushels -					
1939	71,490,633	8,452,323	6,336,463	1,613,861	23,117	87,916,397
1940	88,400,739	8,547,348	3,348,939	1,928,859	222,789	102,448,674
1941	131,149,151	4,740,477	3,299,574	2,914,677	596,361	142,700,240
1942	103,119,251	1,151,331	1,661,988	698,423	269,986	106,900,979
1943	95,933,819	20,413,003	23,546,432	1,259,098	1,899,435	143,051,787
1944	142,503,031	31,783,928	21,725,309	5,261,776	3,624,801	204,898,845
1945	162,672,023	51,016,119	20,942,433	2,770,345	1,920,678	239,321,598
1946	49,247,088	28,413,819	9,730,994	696,150	872,143	88,960,194
1947	77,889,937	22,376,499	10,216,022	1,661,576	27,709	112,171,743
1948	44,021,942	9,853,146	8,620,463	301,929	3,372,308	66,169,788
1949	71,626,299	12,406,241	13,056,298	5,813,791	4,767,109	107,669,738

SHIPMENTS TO THE UNITED STATES

Shipments of the five principal grains to the United States, for either re-export or retention, amounted to 54.8 million bushels during the 1948-49 crop year. With the removal of export restrictions on coarse grains, there has been a sharp increase over the 1947-48 shipments of 21.9 million bushels. Oats moved in the greatest volume to the United States during the crop year ending July 31, 1949, with shipments almost as large as the 1947-48 total for all grains. Approximately 88 per cent of the 1948-49 total shipments to the United States originated at Fort William-Port Arthur.

Shipments of Canadian Grain to the United States, by Points of Origin
August 1, 1948—July 31, 1949

	Pacific Coast Terminals	Western Elevators	Ft. William- Pt. Arthur	Eastern Elevators	Total
	- bushels -				
Wheat	-	-	14,507,253	136,000	14,643,253
Oats	1,828,050	630,880	16,047,679	3,134,784	21,641,393
Barley	-	787,406	10,035,771	199,285	11,022,462
Rye	-	-	7,375,424	100,705	7,476,129
Flaxseed	-	12,123	2,940	-	15,063
T o t a l	1,828,050	1,430,409	47,969,067	3,570,774	54,798,300
August 1, 1947 to July 29, 1948 .	340,611	147,063	19,437,620	1,929,102	21,854,396

FREIGHT ASSISTANCE SHIPMENTS

Preliminary claims filed for payment indicate that shipments of wheat, oats and barley from the Prairie Provinces to Eastern Canada and British Columbia under the Freight Assistance Plan amounted to 79.7 million bushels during the first eleven months of 1948-49. Shipments of the three grains during the August-June period of 1948-49 were almost 30 million bushels below the total for the comparable period of 1947-48. While some upward revision of the 1948-49 shipments will be necessitated by the filing of late claims, there will still be a considerable drop from the 1947-48 totals.

Ontario and Quebec continue to receive the bulk of freight-assisted shipments of feed grains, screenings and millfeeds. Based on claims filed to date these two provinces received approximately 68 per cent of the wheat, 83 per cent of the oats and 85 per cent of the barley shipped under the Freight Assistance Plan during the first eleven months of 1948-49. Freight-assisted shipments of screenings during the period under review amounted to 48,499 tons as against 44,691 tons for the first eleven months of 1947-48. Millfeed shipments, at 511,281 tons were approximately 26 per cent below the comparable figure for 1947-48.

Provincial Distribution of Freight-Assisted Shipments, 1948-49 and 1947-48

	Wheat	Oats	Barley	Screen- ings	Mill feeds
	bu.	bu.	bu.	tons	tons
<u>August 1, 1948 to June 30, 1949</u>					
Ontario	3,383,616	18,992,861	11,919,536	20,519	168,441
Quebec	2,867,384	15,334,599	12,819,761	21,424	218,036
New Brunswick	228,755	1,256,118	1,079,394	1,541	33,266
Nova Scotia	315,117	2,092,126	1,453,844	1,879	39,306
Prince Edward Island	112,196	294,738	519,884	528	8,480
Newfoundland	5,453	71,450	16,108	69	327
British Columbia	2,233,273	5,471,085	1,183,653	2,539	43,425
T o t a l	9,145,794	41,512,977	28,992,180	48,499	511,281
<u>August 1, 1947 to July 31, 1948</u>					
Same Period 1947-48 .	19,973,834	54,508,627	34,955,189	44,691	691,078
<u>August 1, 1947 to July 31, 1948</u>					
Ontario	9,261,650	28,670,463	16,449,819	27,323	263,391
Quebec	6,819,300	20,796,294	15,956,423	13,782	299,342
New Brunswick	737,757	2,406,885	1,544,927	1,956	50,368
Nova Scotia	825,006	2,564,503	1,561,648	1,248	54,410
Prince Edward Island	363,508	518,267	621,417	221	14,333
British Columbia	4,200,201	3,970,808	1,434,210	2,668	67,036
T o t a l	22,207,422	58,927,220	37,568,444	47,198	748,880

EXPORTS OF CANADIAN COARSE GRAINS AND FLAXSEED

Overseas Clearances and United States Imports of Canadian Oats and Barley
August 1948—July 1949

(Source: Statistics Branch, Board of Grain Commissioners, Fort William)

	May	June	July	August-July
<u>OATS</u> ^{1/}				- bushels -
<u>COMMONWEALTH COUNTRIES</u>				
<u>Asia</u>				
Hong Kong	5,882	-	2,941	11,764
<u>North America</u>				
Newfoundland	-	-	-	27,625
TOTAL COMMONWEALTH COUNTRIES .	5,882	-	2,941	39,389
<u>FOREIGN COUNTRIES</u>				
<u>Europe</u>				
Belgium	435,450	531,283	387,571	2,552,263
Netherlands	-	-	-	82,429
Portugal	-	-	-	329,412
Switzerland	-	-	-	95,416
<u>North America</u>				
Cuba	32,941	-	-	32,941
Hawaii	-	-	-	3,823
Panama	3,530	-	7,588	28,647
United States for home consumption ^{2/}	452,007	144,929	^{3/}	18,109,862
<u>South America</u>				
Brazil	-	-	-	5,882
Colombia	-	-	-	5,823
Unknown	-	-	-	5,882
TOTAL FOREIGN COUNTRIES	923,928	676,212	395,159	21,252,380
GRAND TOTAL EXPORTED	929,810	676,212	398,100	21,291,769
<u>BARLEY</u> ^{1/}				
<u>COMMONWEALTH COUNTRIES</u>				
<u>Europe</u>				
Malta	-	-	-	46,667
<u>FOREIGN COUNTRIES</u>				
<u>Europe</u>				
Belgium	1,008,692	799,238	138,156	3,908,112
Denmark	-	-	-	2,492,745
France	-	-	-	29,000
Italy	-	-	-	165,118
Netherlands	-	-	-	2,707,135
Norway	-	-	69,709	1,391,535
Portugal	-	-	-	6,795
Switzerland	-	-	-	84,000
<u>North America</u>				
Hawaii	-	-	-	22,499
Mexico	-	-	-	229,470
United States for home consumption ^{2/}	467,622	613,945	^{3/}	10,182,912
TOTAL FOREIGN COUNTRIES	1,476,314	1,413,183	207,865	21,219,321
GRAND TOTAL EXPORTED	1,476,314	1,413,183	207,865	21,265,988

^{1/} Subject to revision. ^{2/} Source: United States Department of Commerce, Bureau of the Census. ^{3/} United States imports for July not available.

Overseas Clearances and United States Imports of Canadian Rye and Flaxseed
August 1948—July 1949

(Source: Statistics Branch, Board of Grain Commissioners, Fort William)

	May	June	July	August-July
<u>RYE</u> 1/	- bushels -			
<u>FOREIGN COUNTRIES</u>				
<u>Asia</u>				
Israel	-	-	80,000	80,000
<u>Europe</u>				
Belgium	140,547	172,621	-	1,006,766
Netherlands	-	-	-	955,085
Norway	-	-	139,995	779,478
Portugal	-	-	200,000	605,828
<u>North America</u>				
United States for home consumption 2/	132,774	323,459	3/	6,793,971
GRAND TOTAL EXPORTED	273,321	496,080	419,995	10,221,128
<u>FLAXSEED</u> 1/				
<u>COMMONWEALTH COUNTRIES</u>				
Eire	-	-	-	20,490
<u>Africa</u>				
British South Africa	16,099	12,061	-	54,649
<u>Asia</u>				
Hong Kong	-	-	-	142
<u>Europe</u>				
Malta	6,645	-	-	6,645
<u>Oceania</u>				
New Zealand	-	-	-	121,908
TOTAL COMMONWEALTH COUNTRIES	22,744	12,061	-	203,834
<u>FOREIGN COUNTRIES</u>				
<u>Asia</u>				
Israel	3,000	-	-	3,000
Japan	-	-	-	219,567
<u>Europe</u>				
Belgium	269,291	232,863	33,815	2,339,038
France	-	-	-	122,554
Germany	-	-	-	36,695
Italy	-	-	-	99,772
Netherlands	-	-	-	531,455
Norway	-	100,340	-	503,086
Portugal	-	-	-	208,279
<u>North America</u>				
United States for home consumption 2/	9,776	740	3/	145,767
TOTAL FOREIGN COUNTRIES	282,067	333,943	33,815	4,209,213
GRAND TOTAL EXPORTED	304,811	346,004	33,815	4,413,047

1/ Subject to revision.

2/ Source: United States Department of Commerce, Bureau of the Census.

3/ United States imports for July not available.

Customs Exports of Canadian Oatmeal and Rolled Oats, August 1948--July 1949

	May	June	July	August-July
- bushels -				
<u>COMMONWEALTH COUNTRIES</u>				
United Kingdom	58,006	47,061	62,618	582,600
<u>Africa</u>				
Br. South Africa	2,164	-	230	16,248
<u>British West Africa</u>				
Gold Coast	-	-	-	3,303
Sierra Leone	588	273	242	2,461
<u>Asia</u>				
Aden	-	-	-	18
Ceylon	-	-	55	55
Hong Kong	3,546	12,909	4,152	87,406
India	-	182	-	358
Malaya	-	-	-	5,648
Pakistan	-	1,364	-	1,364
<u>North America</u>				
Bahamas	333	-	67	1,697
Barbados	3,515	1,982	-	13,473
Jamaica	11,964	709	4,103	81,370
Trinidad-Tobago	1,121	2,793	1,188	31,872
Leeward & Windward Is. ..	903	1,285	606	22,042
Bermuda	1,224	400	485	9,582
British Honduras	103	85	-	424
Newfoundland	-	-	-	52,024
<u>South America</u>				
British Guiana	1,194	96	945	20,915
<hr/>				
TOTAL				
COMMONWEALTH COUNTRIES	84,661	69,139	74,691	932,860

Customs Exports of Canadian Oatmeal and Rolled Oats, August 1948—July 1949

	May	June	July	August-July
	- bushels -			
<u>FOREIGN COUNTRIES</u>				
<u>Africa</u>				
Abyssinia	-	-	-	218
<u>Asia</u>				
Indonesia	-	-	-	3,727
Japan	-	-	-	79
Palestine	-	-	-	18,812
Philippine Islands	-	406	406	2,479
Siam	-	133	-	315
<u>Europe</u>				
Belgium	-	-	-	4,006
Germany	-	-	-	109,091
Iceland	-	-	-	13,352
Italy	-	-	-	310,358
Netherlands	-	6,679	-	6,679
Switzerland	-	-	13,358	60,394
<u>North America</u>				
Costa Rica	4,770	-	-	10,170
Dominican Republic	-	-	-	7,345
El Salvador	-	-	-	455
Guatemala	1,564	2,782	-	13,479
Honduras	-	-	-	273
Netherlands Antilles	-	-	-	36
Nicaragua	-	-	-	224
Panama	-	109	36	236
St. Pierre & Miquelon	-	-	-	388
United States	363	291	-	18,988
<u>South America</u>				
Brazil	273	5,018	545	7,127
Colombia	-	-	-	8,812
Ecuador	-	3,049	-	4,715
Netherlands Guiana	951	-	-	976
Peru	7,667	552	-	103,503
Venezuela	9,733	7,854	7,497	153,533
<hr/>				
TOTAL FOREIGN COUNTRIES	25,321	26,873	21,842	859,770
<hr/>				
GRAND TOTAL EXPORTED ..	109,982	96,012	96,533	1,792,630

Note:- Conversion rate 1 bushel of oats = 16.5 pounds of oatmeal and rolled oats.

GRADING OF CROPS, 1948-49

Inspections of Canadian coarse grains and flaxseed during the 1948-49 crop year indicate that a relatively high proportion of all grains fell into the higher grades. Generally favourable harvesting conditions in the autumn of 1948 were reflected in the small percentages grading tough, ranging from 0.5 per cent of the inspected flaxseed to 6.0 per cent of the inspected barley. Of the 85,352 cars inspected by the Board of Grain Commissioners during 1948-49, oats and barley together accounted for slightly more than three quarters of the total. In terms of bushel equivalents, total inspections of oats, barley, rye and flaxseed during 1948-49 amounted to 168.3 million bushels.

The 1948 crops of both oats and barley were generally high in feeding quality, with 84 per cent of the oats and 60.9 per cent of the barley grading No. 1 Feed or better. Another 25 per cent of the inspected barley graded No. 2 Feed. Top grades of oats and barley were well represented and were generally adequate for milling and malting requirements, respectively.

Slightly more than 90 per cent of the 9,149 carloads of rye inspected during 1948-49 graded No. 3 C.W. or better, with over half the total grading No. 2 C.W. The grading quality of last year's flaxseed crop was exceptionally high, with 94.4 per cent of the 11,069 inspected carloads classified as No. 1 C.W.

Grading of Coarse Grains and Flaxseed Inspected by the Board of Grain Commissioners August 1, 1948—July 31, 1949

Grain and Grade	Cars	Per Cent	Grain and Grade	Cars	Per Cent
<u>OATS</u>			<u>BARLEY</u>		
2 C.W.	557	1.7	2 C.W. 6-Row	3,061	9.2
Ex. 3 C.W.	3,368	10.5	3 C.W. 6-Row	6,748	20.4
3 C.W.	7,311	22.8	2 C.W. 2-Row	149	0.4
Ex. 1 Feed	3,836	12.0	2 & 3 C.W. Yellow.	174	0.5
1 Feed	11,837	37.0	1 Feed	10,054	30.4
2 Feed	3,021	9.4	2 Feed	8,281	25.0
3 Feed	638)	2.0	3 Feed	2,342	7.1
Mixed Feed	16)		Tough	1,966	6.0
Tough	1,301	4.1	All Others	321	1.0
All Others	153	0.5			
Total Cars ...	32,038	100.0	Total Cars	33,096	100.0
Bushel Equivalent	74,537,048		Bushel Equivalent.	62,529,928	
<u>RYE</u>			<u>FLAXSEED</u>		
1 C.W.	161	1.8	1 C.W.	10,445	94.4
2 C.W.	4,867	53.2	2 C.W.	327	2.9
3 C.W.	3,257	35.6	3 C.W.	138	1.2
4 C.W.	205	2.2	Tough	52	0.5
Tough	394	4.3	All Others	107	1.0
All Others	265	2.9			
Total Cars ...	9,149	100.0	Total Cars	11,069	100.0
Bushel Equivalent	15,818,712		Bushel Equivalent.	15,463,172	

HOG-BARLEY RATIO

During the 1948-49 crop year the hog-barley ratio remained well above the long-time average of 17.2, ranging from a high of 24.1 in September, 1948 to a low of 19.8 in July 1949. Only minor changes have occurred in the ratio during the May-July period as increases in hog prices were generally offset by firmer prices for feed barley. Prices of B1 hogs at Winnipeg averaged \$30.29 per hundredweight, dressed weight basis, during June while the price of No. 1 feed barley averaged \$1.17 per bushel.

Number of Bushels of No. 1 Feed Barley Equivalent in Price to
100 Pounds of B-1 Hog at Winnipeg, By Months, 1944-1949
(Long-time Average= 17.2)

	1944	1945	1946	1947	1948	1949
January	18.1	18.3	17.1	20.7	17.1	21.0
February	18.1	18.3	17.3	21.4	19.6	21.2
March	18.2	18.3	17.1	19.7	20.6	22.0
April	18.2	18.4	18.3	18.1	19.3	21.5
May	18.2	18.5	18.3	18.1	18.7	21.0
June	18.3	19.0	18.4	18.1	19.2	21.5
July	18.3	19.1	18.4	18.1	19.9	19.8
August	18.3	18.0	20.3	18.1	22.8	
September	18.3	18.2	21.0	19.6	24.1	
October	18.3	17.2	19.6	17.8	22.4	
November	18.3	17.0	19.5	14.4	20.7	
December	18.3	17.0	19.5	13.9	21.7	

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

Index numbers of prices for both feed and live-stock products were slightly higher in the last month of the 1948-49 crop year than in July 1948. The feed index in July 1949 stood at 160.5, the highest for the past year, and 12.5 points above the May level. The sharp increase in the feed index during June and July was largely the result of higher prices for hay and feed grains, particularly barley. Live-stock prices have remained at fairly high levels throughout the entire crop year although there has been some tapering off from the peak of 189.3 established in August 1948.

Index Numbers of Feed Prices and Prices of Live Stock and Live-Stock Products
by Months, 1946-1949 (1926=100)

	1946		1947		1948		1949	
	Feed	Animal	Feed	Animal	Feed	Animal	Feed	Animal
January ...	108.3	125.0	110.5	138.3	172.6	164.4	149.6	184.0
February ..	108.3	126.0	112.9	140.1	159.6	164.3	143.7	178.3
March	105.7	126.1	118.8	141.0	156.8	163.9	143.7	180.9
April	104.6	126.5	122.2	142.5	164.2	167.6	147.0	183.5
May	105.4	127.7	122.7	143.2	174.7	171.2	148.0	183.4
June	104.8	130.5	123.1	144.4	172.1	180.1	153.1	184.8
July	102.8	130.6	124.6	142.7	157.7	182.7	160.5	184.6
August	103.4	129.3	130.0	142.8	152.3	189.3		
September .	105.1	129.2	138.7	142.2	151.0	188.4		
October ...	108.7	135.8	152.2	145.3	153.7	186.8		
November ..	109.6	137.1	166.4	147.5	154.8	186.5		
December ..	110.7	137.0	168.2	156.9	150.9	186.3		

GRAIN CORN

Preliminary acreage estimates for 1949 place the area seeded to grain corn in Canada at 270,100 acres, an increase of 7 per cent over the 252,300 acres seeded in 1948 and 10 per cent over the average of 246,480 acres for the past ten years. Grain corn is currently grown commercially in only Ontario and Manitoba, with the former province accounting for all but 20,000 acres of this year's seeded acreage. While no official estimate of the 1949 corn production will be available until September 15, current indications are that near-average yields will be harvested.

Despite the fact that last year's corn crop was almost double that of 1947, imports were maintained at fairly high levels to meet the requirements of the starch and glucose industries, stock and poultry feed manufacturers and other commercial users. All of Canada's imports of corn during the past crop year have come from the United States which last year harvested a record crop of 3.4 billion bushels of grain corn.

Canadian Production and Imports of Corn, Crop Years 1939-40--1948-49

Crop Year	Production	Imports	Crop Year	Production	Imports
- 000 bushels -					
1939-40	8,097	8,490	1944-45	11,700	2,290
1940-41	6,956	7,174	1945-46	10,365	1,671
1941-42	13,362	5,017	1946-47	10,661	8,561
1942-43	14,372	4,318	1947-48	6,682	5,975
1943-44	7,775	4,721	1948-49	12,417	6,932 ^{1/}

^{1/} August—June.

FLAXSEED

With a greatly improved world supply situation existing in linseed oil, demand for the chief product of the Canadian crushing industry has tapered off considerably during the past year. As a result of this development and the 1948 near-record Canadian production of 17.7 million bushels of flaxseed, available supplies were more than adequate to meet export and crushing requirements during 1948-49. In view of current conditions, Canadian farmers sharply decreased the acreage sown to flaxseed in 1949. The first official estimate of production on August 16 placed the 1949 production at only 2.5 million bushels, but a record carry-over of 10.7 million bushels should ensure adequate supplies throughout 1949-50.

Acreage Yield and Production of Flaxseed in Canada, 1939-49

Year	Acreage	Yield	Production
	acres	bu. per acre	bu.
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
1948 (revised)	1,876,500	9.4	17,683,000
10-year average 1939-48	1,278,710	7.6	9,737,150
1949 (preliminary)	321,100	7.9	2,525,000

MILLFEEDS

Preliminary returns indicate that **Canada's 1948-49 millfeed production** amounted to 693,466 tons, a decrease of approximately 20 per cent from the previous crop year total of 866,724 tons. Except for the three-month period, September to November, Canadian flour mills operated at less than 70 per cent of **their** rated capacity, in marked contrast to the situation existing during recent years. Peak production in 1948-49 occurred in September when the output of millfeeds amounted to 75,395 tons.

The removal of export restrictions on millfeeds resulted in a substantial export movement of 53,969 tons in 1948-49 as against 30,502 tons in 1947-48. Imports have been comparatively small, although the total for the first eleven months of 1948-49 is somewhat higher than the 1947-48 total. As a result of decreased production and increased exports, domestic disappearance during 1948-49 has fallen approximately 23 per cent below the 1947-48 level of 842,391 tons. Prices of bran and shorts declined during the last three months and at mid-August were quoted by wholesalers at \$51.50 and \$53.50 per ton, respectively, with freight assistance payments deducted, f.o.b. Toronto and Montreal. Quotations for middlings on the same basis remained at \$56.50 per ton.

Supply and Distribution of Millfeeds, 1948-49 and 1947-48

1948-49	Production	Imports	Exports	Apparent Domestic Disappearance <u>1/</u>
- tons -				
August	57,100	396	1,319	56,918
September	75,395	812	4,782	71,305
October	69,131	1,479	7,255	64,215
November	67,023	1,408	5,842	64,216
December	58,348	911	3,349	56,115
January	49,614	550	711	49,587
February	48,967	571	515	45,649
March	56,429	474	5,462	54,946
April	53,723	732	10,502	46,631
May	52,634	1,180	5,982	46,089
June	56,005	948	2,803	53,087
July	49,097	<u>2/</u>	5,447	42,736 <u>2/</u>
T o t a l	693,466	9,461	53,969	651,494
1947-48 (revised).	866,724	9,101	30,502	842,391

1/ Adjusted for changes in stocks in mills.

2/ Imports for July not available.

The breakdown of millfeed production during 1948-49 with revised figures for the crop year 1947-48 is as follows:

Production of Millfeeds, 1948-49 and 1947-48

	Bran	Shorts	Middlings	Total
- tons -				
1948-49	283,699	266,852	142,915	693,466
1947-48 (revised)	360,613	338,809	167,302	866,724

DOMESTIC AND EXPORT PRICES OF CANADIAN COARSE GRAINS

While cash grain prices for oats, barley and rye showed firmness during the final quarter of 1948-49, the July 1949 averages were below those of the same month in 1948 for both oats and rye. Barley prices advanced sharply during July 1949, and the monthly average of \$1.23 1/2 per bushel for No. 1 Feed was 6 1/8 cents above the average for the preceding month. Rye prices also made gains during the May-July period but the July average of \$1.41 1/8 for No. 2 C.W. was 93 1/4 cents below the average for the same month last year. On May 9 the Canadian Wheat Board reduced the selling price of No. 1 C.W. flaxseed to \$3.80 per bushel, basis in store Fort William-Port Arthur. Prices to producers, however, remained at the support price of \$4.00 per bushel until July 31.

Support prices were in effect for oats, barley and flaxseed throughout the 1948-49 crop year. In the case of flaxseed, prices dropped to the support level of \$4.00 per bushel in September and, with minor exceptions, remained there for the remainder of the crop year. Generally speaking, prices of oats and barley remained well above the support levels, established at 61 cents per bushel for No. 1 Feed Oats and 90 cents per bushel for No. 1 Feed Barley, basis in store Fort William-Port Arthur. Prices for No. 1 Feed Oats ranged from a high of 85 cents per bushel on November 16 to a low of 67 1/2 cents on February 19, the latter price being within 6 cents of the support level. High and low prices for No. 1 Feed Barley during 1948-49 were established on July 25 and September 7 at \$1.34 and \$0.99 5/8 per bushel, respectively. Prices for both oats and barley are being supported in 1949-50 at the same levels as in 1948-49.

Monthly Average Prices, Canadian Coarse Grains and Flaxseed (Basis in Store Fort William-Port Arthur)

	July 1947	July 1948	May 1949	June 1949	July 1949
- cents and eighths per bushel -					
<u>OATS</u>					
(1) Domestic and Producers					
2 C.W.	65	86/4	78/4	76/7	78/7
Ex. 3 C.W.	65	83/5	76/2	76	76/1
3 C.W.	65	83/4	76/2	76	76/1
Ex. 1 Feed	65	83/3	76/1	75/1	76
1 Feed	65	82	74/5	74/6	74/7
2 Feed	65	80	71/7	71/3	73/1
3 Feed	65	77/2	68/4	67/4	70/3
(2) Export-Schedule (1) plus equalization fees					
Equalization Fees - East	51/2	19/1	-	-	-
West	51/2	19/1	-	-	-
B.C.	51/2	19/1	-	-	-

Monthly Average Prices, Canadian Coarse Grains and Flaxseed
(Basis in Store Fort William-Port Arthur)

	July 1947	July 1948	May 1949	June 1949	July 1949
- cents and eighths per bushel -					
<u>BARLEY</u>					
(1) Domestic and Producers					
1 C.W. Six-Row	93	125	126/6	121/1	130/4
2 C.W. Six-Row	93	125	126/6	121/1	130/4
3 C.W. Six-Row	93	124/5	120/1	119/7	128/3
1 C.W. Two-Row	93	124/6	118/2	117/4	126/7
2 C.W. Two-Row	93	124/6	118/2	117/4	126/7
2 C.W. Yellow	93	124/1	118/2	117/4	126/7
3 C.W. Yellow	93	122/1	117/2	117/3	125
1 Feed	93	119/2	116/4	117/3	123/4
2 Feed	93	109/6	115/1	116/2	122/2
3 Feed	93	105/3	110/3	111/4	118/7
(2) Export:- Schedule (1) plus equalization fees					
Equalization Fees - East	112/1	22/2			
West	112/1	22/2			
<u>RYE</u>					
(1) Domestic and Producers					
2 C.W.	360/6	234/3	125/7	129/6	141/1
3 C.W.	355/6	229/3	121/2	125/3	136/2
4 C.W.	295/1	145/4	115/7	120	131/1
Ergoty	266/2	135/4	107/7	112	123/1
Rejected 2 C.W.	291/1	140/4	112/7	117	128/1
(2) Export:- same as Schedule (1)					
<u>FLAXSEED</u>					
(1) Domestic and Producers					
(a) Domestic - to crushers					
1 C.W.	325	500	384/6*	380	380
2 C.W.	321	495	-	-	-
3 C.W.	312	484	-	-	-
4 C.W.	308	475	-	-	-
(b) Producers					
1 C.W.	325	550	400	400	400
2 C.W.	321	545	395	395	395
3 C.W.	312	534	384	384	384
4 C.W.	308	525	375	375	375
(2) Export:- same as Schedule (1a)					

* Effective May 9, 1949 Domestic and Export Prices \$3.80 per bushel.

UNITED STATES FEED 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.

"A record large supply of feed grains and other concentrates is in prospect for the 1949-50 feeding season, principally as a result of very favorable weather for feed crops through early July and the large stocks of feed grains on hand from the 1948 season. The total production of the 4 feed grains was estimated on July 1 to be about 130 million tons, only 6 per cent less than the record large production in 1948. If July 1 indications are realized, the supply of all feed concentrates, including the grains and byproduct feeds, will be about 8 per cent larger than the big supply for 1948-49 and one-third larger than in the immediate prewar period. In relation to the number of live stock to be fed during 1949-50, the supply is expected to be about 6 per cent above the record supply per animal unit last year.

Much of the increase from 1948-49 would result from the 15 per cent prospective increase in the corn supply. In addition to the big 1949 corn crop, estimated in July at 3.5 billion bushels, a carry-over of about 800 million bushels is in prospect for next October 1. A corn crop of 3.5 billion bushels would be much larger than the prospective domestic and export requirements in the 1949-50 marketing year, and a further increase in the carry-over of corn is expected. The ~~oat~~ supply for 1949-50 is about as large as last year and much above average, while the barley supply is a little smaller than a year ago. Another large supply of byproduct feeds is in prospect, although it may be a little smaller than for the current season. With large supplies of other feeds, the quantity of wheat fed in the 1949-50 feeding season is expected to be near the low level of 1948-49.

Feed supplies will be especially large in the North Central region, where another big corn crop is in prospect and a record carry-over of corn will be available from the 1948 crop. The large supply of corn in this area is expected to result in some further increase in the total quantity of corn going under the Government support program during 1949-50.

For the country as a whole, the hay supply of 113 million tons, as estimated in July is a little smaller than in most recent years, but it is expected to be adequate for the fewer hay consuming live stock on farms. On July 1 pastures were in about average condition.

Domestic disappearance of feed grains during April-June was about one-fourth larger than a year earlier, and about equal to the 1943-47 average. Corn disappearance during October-June was about 9 per cent larger than during the first 9 months of 1947-48, but otherwise was the smallest for the period since 1940-41. Stocks of corn on July 1 totaled 1,277 million bushels, about 300 million bushels larger than the previous record stocks for that date. Of the total July 1 stocks about 533 million bushels or 42 per cent were under loan or Government purchase agreement."



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CALENDAR OF COARSE GRAIN EVENTS

- June 1 The Rt. Hon. C. D. Howe, Minister of Trade and Commerce, announced that it is the government's intention to authorize the Canadian Wheat Board to undertake the marketing of western Canadian oats and barley commencing August 1.
- July 20 It was officially announced that oats and barley produced in the Prairie Provinces will be marketed through an oats pool and a barley pool operated by the Canadian Wheat Board, effective August 1, 1949. Initial payments to producers will be based on the 1949-50 support price of 61 1/2 cents for oats and 90 cents for barley, basis No. 1 Feed grades in store Fort William-Port Arthur. Deductions of 1 1/2 cents per bushel on oats and 3 cents per bushel on barley are to be made to **constitute** a reserve against country carrying charges and pool operating expenses to the Lakehead.
- 21 The preliminary estimate of crop acreages issued by the Dominion Bureau of Statistics placed the Canadian acreage of all wheat at 27.5 million acres, oats at 11.3 million, barley 6.0 million, all rye 1.2 million and flaxseed at 334,800 acres.
- 28 The fixed minimum carlot prices for all grades of oats, barley and flaxseed for the 1949-50 season, basis in store Fort William-Port Arthur, were announced by the Canadian Wheat Board. Prices for No. 2 C.W. oats, No. 1 C.W. 6-row barley and No. 1 C.W. flaxseed were set at 65 cents, 95 cents and \$2.50 per bushel, respectively, with prices for other grades fixed at appropriate differentials.
- 30 The Canadian Wheat Board announced that there would be no delivery quotas on rye and flaxseed in the crop year 1949-50. 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 for one or more of these grains.
- August 11 Effective August 12, delivery quotas of 10 bushels per seeded acre are to be in effect for both wheat and oats except at specified points declared open.
- 16 Canada's 1949 grain production in millions of bushels, as estimated by the Dominion Bureau of Statistics, is as follows: all wheat 391.5; oats 317; barley 126.5; all rye 9.9 and flaxseed 2.5.
- 17 The Canadian Wheat Board announced that all persons or companies who wish to import grain or grain products must obtain written permission from the Board. The order, issued under the authority of the Canadian Wheat Board Act, applies to grain whether it is imported in bond, or for consumption or storage.
- 18 Carry-over stocks of Canadian grain in all positions at July 31, 1949 were, in million of bushels, wheat 98.7; oats 59.1; barley 29.0 rye 12.0 and flaxseed 10.7.
- 29 Trading in flax futures was resumed on the Winnipeg Grain Exchange, with quotations for October and December deliveries closing at \$3.40 1/2 and \$3.37 per bushel, respectively.