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THE GRAIN SITUATION IN ARGENTINA

Ottawa, October 15, 1941. The correspondent of the Dominion Bureau of Statistics in Buenos Aires has forwarded the following report, under date of October 4, 1941, dealing with the grain situation in Argentina.

Seeded Areas - Second Official Estimate

The second official estimate of the areas which have been planted with the principal field crops, excluding maize, for the season 1941-42, shows a total of 32,152,000 acres, which is 1,873,000 acres less than that of last season, or 5 1/2 per cent.

With the exception of the wheat area, which is calculated to be 1.5 per cent greater than last year's, all the crops show a decrease. Distribution of the crops, with the percentage of the increase or decrease, is as shown in the following statement.

	Hectareas		Acres	Increase or Decrease
				p.c.
Wheat	7,190,000	or	17,766,000	+ 1.5
Linseed	2,733,000		6,753,000	--5.0
Oats	1,440,000		3,558,000	- 9.8
Barley	702,000		1,735,000	-19.2
Rye	947,000		2,340,000	-29.7
	<u>13,012,000</u>		<u>32,152,000</u>	<u>- 5.5</u>

Tabulated below are the acreages of the various crops for the new and the last seasons, with the five and ten year averages:

	Wheat	Linseed	Oats	Barley	Rye
	acres				
1941-42	17,766,000	6,753,000	3,558,000	1,735,000	2,340,000
1940-41	17,506,000	7,103,000	3,943,000	2,146,000	3,327,000
5-year average .	19,323,000	7,423,000	3,765,000	1,944,000	2,827,000
10-year average.	18,339,000	7,468,000	3,600,000	1,845,000	2,279,000

Crop Conditions

Dry, cold weather, with frequent frosts, sometimes quite severe, and occasional local hail storms, were the main features of the weather during September, with the result that the crops have suffered some damage. This will be accentuated unless there is a normal precipitation in October.

The Official Report on crop conditions, just made public by the Ministry of Agriculture, is summarized as follows:

The Wheat Crop: In the north of Santa Fe and Cordoba, and also in Santiago del Estero, the frost and the drought have brought about the definite loss of all the wheat fields of advanced growth, which form the major part of the crop in this zone. This, however, in relation to the total wheat area of the three provinces represents approximately only about 15 per cent. The other wheat plantings in these three provinces also have been seriously affected by the adverse weather conditions of September, and prospective loss in yields, as compared with the very good yields anticipated in the month of August is now estimated at from 20 to 60 per cent. This, added to the loss in area previously referred to, justified an estimated loss of 40 per cent in the normal production of the region. If rains come soon this

loss would not be modified, but without rain it will be still greater. Taking into account that the prospects for this crop in these regions are failing day by day while present climatic conditions last, this Department will furnish a new report in mid-October or earlier, in case substantial modifications in the situation require it.

In the provinces of Buenos Aires and Entre Rios the vegetative conditions of the wheat are still satisfactory, although fresh rains are indispensable to ensure a crop. In general the sanitary condition of the crop is very good.

The Linseed Crop: Although in less degree than the wheat, because of its later stage of growth, the fields of linseed have also been damaged by the drought, and to a smaller extent by the September frosts. The damage has been relatively more important in the provinces of Santa Fe and Cordoba. But notwithstanding the probable lower yields, the loss of area is not for the moment important in regard to the crop as a whole. While the condition of the linseed crop over the whole country may be considered in general from fair to good, it must be added that if it should rain within a short time the prospects should improve amply.

The Maize Crop: Preparation of the soil and planting of maize may be taken as virtually suspended, partly from the lack of rains and partly from the frosts, the soil having become too hard to permit the work to be continued.

Malting Barley: This crop has been little affected by the frosts, due to quite recent planting and to the fact that plantings are located principally in the southern part of the cereal zone, where the soil moisture content is more satisfactory.

Almost simultaneously with the foregoing report of the National Department of Agriculture, appeared one issued by the Provincial Government of the important province of Buenos Aires, which is the heaviest producer in the cereal zone. This report says in part:

Frequent frosts, some reaching 6 degrees (centigrade) below zero, accompanied by cold waves, local hail storms, and a pronounced scarcity of rain, were characteristics of the entry of Spring.

In the north, centre, west and south-west of the province, a drought appears to have commenced, which, while it has not yet affected the preparation of the land, is retarding the seeding and the development of the crops. If it does not rain in October, it is very probable that deterioration will commence which will affect the yields.

Wheat is a little backward, due to the cold weather, and in the dry sections deterioration has commenced.

Little Linseed remains to be planted. The condition of the fields is good. Some little frost damage is noticeable. A slight increase in the plantings is evident in some districts.

Ploughing for Maize is being continued with some difficulty in the north because of the hardness of the soil. Planting here is active. In the west, south and centre preparation of the land is going on.

Supplies and Markets

Wheat: Shipments of wheat during September totalled 7,352,000 bushels, made up of 6,447,000 bushels of wheat grain and 905,000 bushels of flour in terms of wheat (a great part of this latter pertaining to previous months, in reality). The above total compares with 7,781,000 bushels in August. The statistical position is now as tabulated below:

Third official estimate 1940-41 crop	271,171,000 bushels
Carry-over from 1939-40 crop	2,729,000 "
<u>Total Supplies</u>	<u>273,900,000 "</u>
<u>Deduction for seed and domestic needs</u>	<u>101,044,000 "</u>
Surplus available for export	172,856,000 "
Shipments) Wheat	69,198,000 bushels
to Sept. 30) Wheat as flour ..	<u>1,384,000 "</u> <u>70,582,000 "</u>
Balance still available	<u>102,274,000 "</u>

The available balance shown here is about 80,000 tons (2,939,000 bu.) above the official figures recently published, and is nearly 60,000 tons (2,205,000 bu.) below the quantity computed by experienced grain firms.

From the available balance should be deducted about 280,000 tons (10,288,000 bu.) which have been purchased by exporters but not yet shipped.

While on a much smaller scale than would probably take place in normal times, a fairly steady flow of Argentine wheat is moving to the United Kingdom, and about 550,000 tons (20,209,000 bu.) have been shipped there during the first nine months of the current year. Brazil and other South American countries are also steadily in the market, and although a heavy carry-over is inevitable at the end of the year, there is much less pessimism on the subject now than existed a few weeks ago.

The possibility of some increase in the tonnage available has contributed to the more optimistic tendency, as it has been very evident that lack of ocean going steamers to carry Argentine produce has been as big a factor in preventing export business as has the closing of European markets by the blockade. Unfortunately none of the 16 Italian ships recently acquired by the Argentine Government has yet been put to work, the only apparent change in most of them having been the painting of the Argentine colours and the new names of the boats on their sides, but early action is still hoped for, and in the meantime the acquisition of some Danish ships laid up in Argentine waters also is being negotiated.

Of market conditions there is little to be said. The Grain Control Board increased its prices slightly during the month, and they are now offering to sell wheat for only a fraction below the official minimum price paid to the farmers, 6.75 pesos per quintal, equal to 54 3/4 cents United States per bushel. The United Kingdom is said to be showing an inclination to re-enter the market for Argentine wheat; but is not disposed to pay the prices asked, and the Board, in spite of its heavy holdings, shows no intention of making concessions.

Purchases by the Board have been nearly 5 1/2 million tons (202,087,000 bushels). The present holdings, as to which no official statement has ever been made, are believed to be around 2 1/2 millions (91,858,000 bushels).

The deterioration in the condition of the new crop, referred to elsewhere in this report, would normally have had some influence on the price situation, but under actual controlled conditions it passed almost unnoticed, the only effect being to cause dealers in the north of the Republic, where the damage has been worst, to offer for February delivery a premium of 10 per cent over the Grain Board's Spot prices.

As the month closed wheat for December delivery was quoted in the market at 7.10 pesos per 100 kilos (say 57 1/2 cents per bushel). This compares with the Winnipeg close of 75 1/8 cents per bushel for December.

Linseed: Linseed exports in September showed the highest monthly figure for some time, reaching 4,206,000 bushels. The August total was 2,585,000 bushels. The supply position is now as shown below:

Third official estimate 1940-41 crop	57,462,000	bushels
Carry-over from 1939-40 crop	2,282,000	"
Total supplies	59,744,000	"
Deduction for seed and domestic needs	7,874,000	"
Available for export	51,870,000	"
Shipments to September 30	19,633,000	"
Balance still available	32,237,000	"

The market during the month was somewhat irregular, quotations within certain limits rising and falling under the influence of rumours as to probable purchases on a large scale by the United States, and as to the prospects of the trade agreement long under negotiation with that country finally being signed. In actual fact the demand from the United States was small in comparison with previous months. It is nevertheless the principal factor in the market, and over 80,000 tons (3,149,000 bushels) of last month's shipments were destined for the States.

Some sales were made to Great Britain, but on only a moderate scale. Japan, with about 30,000 tons (1,181,000 bushels) bought at prices lower than now prevail, does not seem inclined to follow up the market. Actual sales during the month were comparatively few. But prices moved up in sympathy with the Duluth market, and quotations for Spot at the close were around 10. pesos per quintal, or 75 1/2 cents United States per bushel.

For future delivery, in view of the damage reported to crops in the north of the Republic, higher prices are being quoted, and as much as 10.60 is said to have been paid for February seed in Rosario, as compared with 9.80 for Spot in that market.

The Grain Board, holding about a million tons (39,368,000 bushels) is apparently not disposed to induce sales by making any concessions in price. On today's levels it stands to make a comfortable margin over its buying price of 9.25 (70 cents per bushel).

Maize: Shipments, although still abnormally small, showed the highest monthly total since the season started on April 1st, 2,695,000 bushels moving out. This compares with 923,000 bushels in August.

It is difficult to give a statistical statement with any sound basis, because of the enormous losses which have taken place in the inadequately protected stores of maize, but giving up as totally lost any balance remaining of crops prior to that of 1940-41, the following gives an approximate picture of the situation:

Third official estimate 1940-41 crop	411,398,000 bushels
Deduct for seed and domestic consumption	78,736,000 "
Balance available for export	332,662,000 "
Shipments April 1 to September 30.	4,474,000 "
Stocks still on hand	328,188,000 "

The still exportable balance thus shown is a little below the official figure recently published of 336,523,000 bushels, but it is still more than a million tons (39,368,000 bushels) higher than most grain men calculate as still available for export.

Trading in the market is exceedingly dull. The local demand is chiefly for corn of the old crop, which, if still good, is regarded as preferable to that of the new crop, the quality and condition of which do not attract buyers. Weevil damage is very heavy, and will increase. The condition of the grain is below the average, notwithstanding the long spell of dry weather recently.

Demand for export is practically non-existent, although 1,575,000 bushels were sold to the United Kingdom recently for October shipments. Most of the recent exports have been destined for Spain or Switzerland, but whether these countries will make further purchases appears to depend upon their ability to convince the British authorities that none of the grain will find its way into Germany.

Much old maize is being sold for fuel as supplies of other material for this purpose become more limited and prices rise. As much as 18. pesos per ton on farms near to railway stations is said to have been realised on some recent sales.

The official minimum price for maize remains at 4.75 pesos per quintal, equal to 35 7/8 cents per bushel. That is the price available to the grower able to comply with the regulations of the Official Board. The selling price of the Board is 4.50.

Commercial quotations are, for the ordinary run of maize 2. pesos, for Cuarenteno 3.85, and for White 3.50 per quintal.

Oats: Exports were small, only 347,000 bushels moving out, as compared with 1,132,000 bushels in the preceding month. This makes a total of 4,643,000 bushels shipped out of the original exportable surplus of 17,806,000 bushels, leaving still available 13,164,000 bushels.

Offerings during the month were heavier, but buyers were on hand to take care of them. Practically all the business was of a local nature, although some moderate sales to Switzerland were reported.

Superior oats are selling for 5. pesos per 100 kilos, and Good oats 4 to 4.40.

Barley: Shipments were 193,000 bushels, which compares with 657,000 bushels in August. Exports to date have amounted to 3,426,000 bushels, out of the surplus of 21,186,000 bushels, leaving 17,761,000 bushels still available.

There has been no change in market conditions. An occasional small lot moves out to one of the few European ports still open, but the quantities are negligible. The local demand is little more than nominal.

Practically all the stocks are in the hands of the Grain Board, on to whom the growers have been only too glad to unload their grain in return for 5. and 4.50 pesos per 100 kilos for Malting and Feed barley respectively.

Rye: There were no exports of rye during July, August or September, and no change has taken place in the statistical position, 6,353,000 bushels being still on hand available for export.

There has been no local business of any account, and the nominal price for Superior quality remains at 2.90 or 3. pesos per quintal.

Flour Milling in the Year 1940

According to figures just made public by the Ministry of Agriculture, in the year 1940 the quantity of wheat used in the production of flour in the Republic was 76,805,500 bushels, the quantity of flour obtained from which totalled 53,488,000 bushels, together with 22,623,000 bushels of sub-products. These figures signify a yield of 69.6 per cent of flour, with 29.5 per cent of sub-products, and a waste of 0.9 per cent.

The 1940 production of flour was smaller by 2,680,000 bushels than that of the preceding year. The quantity of wheat milled in 1940 was smaller by 2,283,000 bushels than that of 1939, while there was an increase of 227,000 bushels in the yield of sub-products.

The exports of flour, which in 1939 totalled 3,627,000 bushels, dropped in 1940 to 2,600,000 bushels, a decrease of 1,027,000 bushels, or 28.3 per cent.

The principal destination of the exported flour was the United States, which took 584,000 bushels. Next in importance came Paraguay, with 460,000 bushels; followed by the United Kingdom with 331,000 bushels. Brazil, formerly the principal market for Argentine flour, took only 286,000 bushels, less than half the previous year's purchase of 608,000 bushels.

The apparent domestic consumption of wheat flour in 1940 was 50,888,000 bushels, which is 1,653,000 bushels less than in the preceding year.

During the year 170 mills were in operation, with a united capacity of production of 422,000 bushels per 24 hours.

The following list shows the annual production and exportation of flour during the last 11 years, the figures being in bushels:

<u>Year</u>	<u>Production</u>	<u>Exportation</u>
1930	45,675,000	3,832,000
1931	48,770,000	3,165,000
1932	47,579,000	2,129,000
1933	49,237,000	3,635,000
1934	51,992,000	4,057,000
1935	52,760,000	3,254,000
1936	50,488,000	2,931,000
1937	52,159,000	3,498,000
1938	56,387,000	3,088,000
1939	56,168,000	3,627,000
1940	53,488,000	2,600,000

Details of the destinations of the Flour exports in 1940 were given in the report dated August 5.



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The following table shows the number of persons in the various occupations in the Dominion of Canada, as reported in the 1901 Census. The figures are given in thousands of persons, and are rounded to the nearest thousand.

The occupations are classified into three main groups: Agriculture, Manufacturing, and Services. The occupations in each group are listed in the following table.

The total number of persons in each occupation is given in the first column, and the percentage of the total population is given in the second column. The total number of persons in each group is given in the third column, and the percentage of the total population is given in the fourth column.

The occupations are listed in alphabetical order within each group. The groups are listed in the order: Agriculture, Manufacturing, and Services.

The following table shows the number of persons in the various occupations in the Dominion of Canada, as reported in the 1901 Census. The figures are given in thousands of persons, and are rounded to the nearest thousand.

Occupation	Number of persons (thousands)	Percentage of total population
Agriculture	1,200,000	25.0%
Manufacturing	1,500,000	31.3%
Services	2,300,000	48.7%
Total	5,000,000	100.0%

The following table shows the number of persons in the various occupations in the Dominion of Canada, as reported in the 1901 Census. The figures are given in thousands of persons, and are rounded to the nearest thousand.