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MONTHLY DAIRY REVIEW OF CANADA 1947

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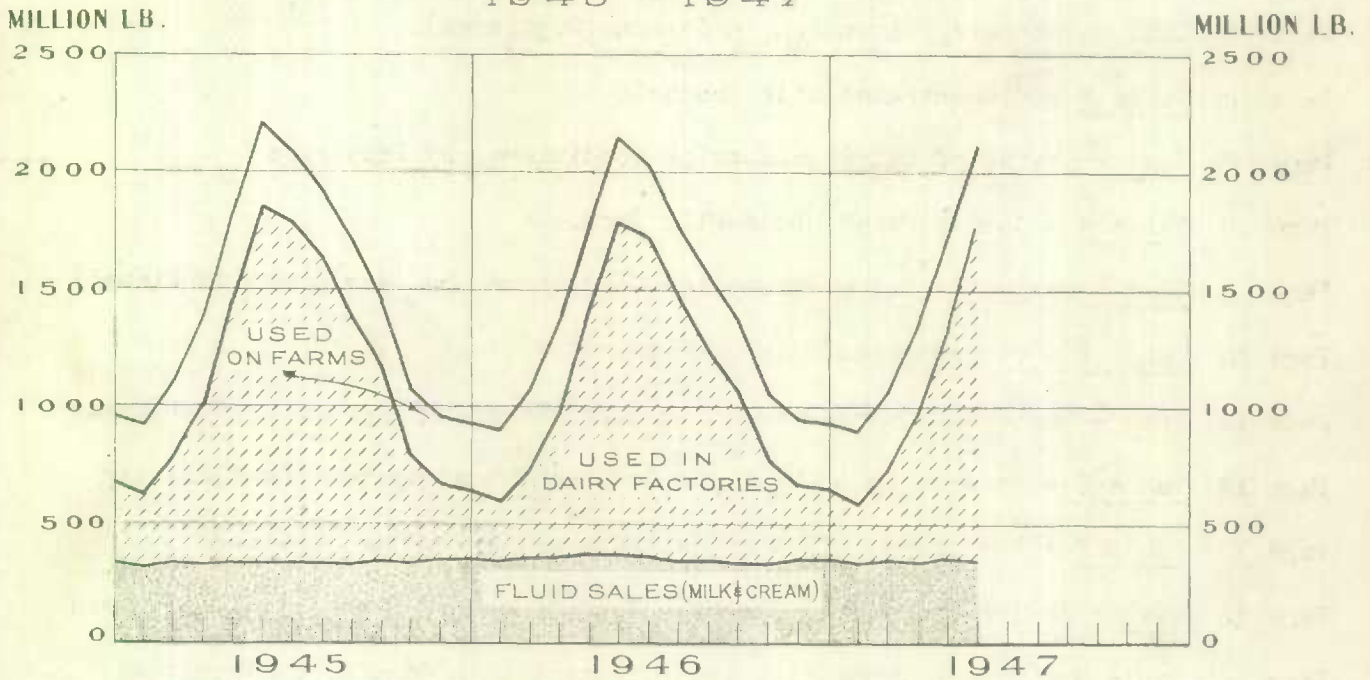
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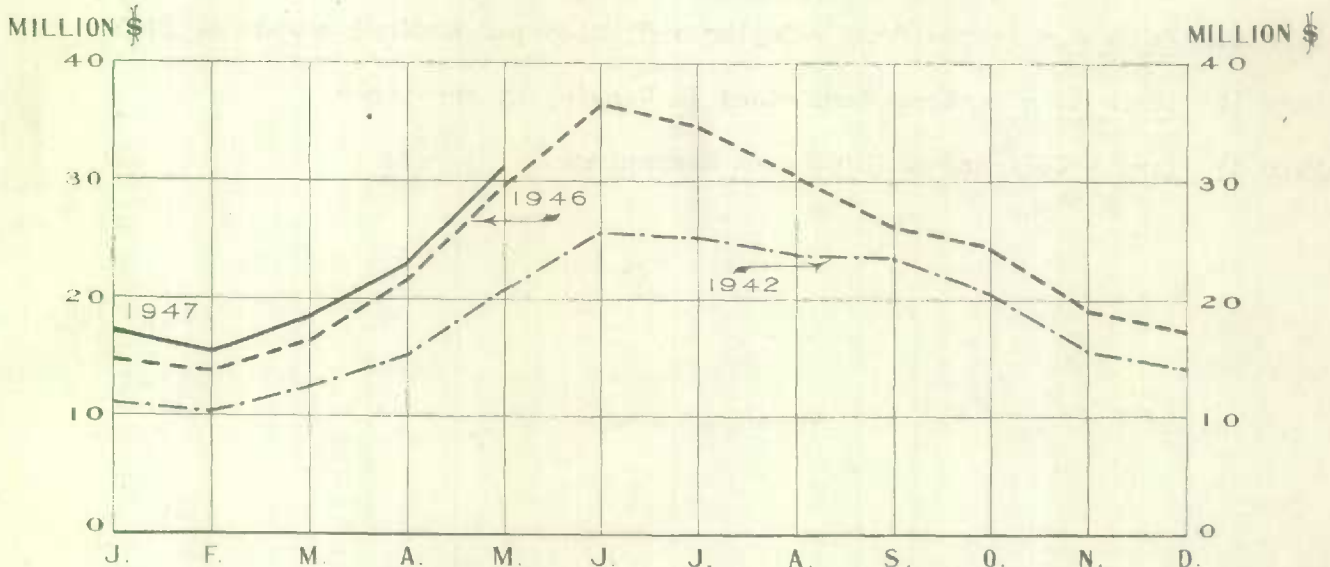
July

Published August 28, 1947.

MILK PRODUCTION AND UTILIZATION 1945 - 1947



SALES INCOME FROM DAIRYING



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THE DAIRY POSITION IN BRIEF

The upward trend in creamery butter production continued during July, showing an increase of 3 per cent over that produced in the same month of the preceding year. Although Stocks in store and transit moved up to 58 $\frac{1}{2}$ million pounds on August 1, this amount was practically the same as that held at the same date a year ago.

The dairy butter make for July, 1947 was estimated at 4 $\frac{1}{2}$ million pounds, being a 4 per cent increase as compared with that produced in July, 1946. Whey butter production amounted to 390 thousand pounds, an increase of 6 per cent.

The total butter supply (obtained by adding creamery, dairy and whey butter production to stocks on hand at the beginning of the month) advanced to 90 million pounds in July as compared with 86 million pounds in the same month a year ago. Butter exported from Canada during July amounted to 180 thousand pounds as against 333 thousand pounds in July, 1946.

The domestic disappearance of butter (creamery, dairy and whey butter) reached a total of 31 million pounds in comparison with a little more than 26 $\frac{1}{2}$ million pounds in July, 1946. Thus, while there was a gain of 5 per cent in the total supply of butter, there was an increase of 16 per cent in domestic disappearance.

Wholesale butter prices at Montreal quoted by the Canadian Commodity Exchange averaged 49 $\frac{7}{8}$ cents per pound in July as against 39 $\frac{3}{8}$ cents in the same month of 1946. Cheese prices averaged 26 cents. In July, 1946, the average was 23 cents.

Fluid milk sales in the month of June were estimated at 364 million pounds. This includes almost 69 million pounds sold in the form of cream and approximately 295 million pounds sold as milk. While milk sales declined 7 per cent from the same month last year, cream sales (in terms of milk) increased 33 per cent.

The total milk production of Canada for the month of June has been estimated at approximately 2,121 million pounds, only 1 per cent less than that produced in June, 1946. Almost 66 per cent of the supply was used in factory products.

Farm income from the sale of dairy products in the month of May amounted to \$30,124,000. This represented an increase of \$226,000 over that of May, 1946. The average per hundred pounds of milk was \$2.19 as against \$2.07 a year ago.

Milch cow numbers as reported by Dairy Correspondents in June, showed a decrease of 2 per cent in comparison with the holdings of June, 1946. This rate of decrease has remained almost constant for three months in succession.

The labour situation is still causing concern. Wages are high and it is difficult to procure the class of help required for dairy farmers.

Weather reports in July revealed normal temperatures in the Eastern Provinces, with less sunshine and more precipitation than in the same month a year ago. In the Western Provinces a heat wave developed about the middle of the month, causing a semi-drought condition in some areas.

Pastures stood up well throughout the month of July. In the Eastern Provinces and in Manitoba the growth was better than last year, while in the three remaining provinces pasture conditions were below the averages of July, 1946. A heavy hay crop of below average quality has been gathered in the Eastern Provinces. Haying operations were delayed on account of the late spring and wet weather during July. The coarse grains harvest in the Prairie Provinces is expected to show a decline of about one-fifth from last year, and in Eastern Canada a still greater reduction is anticipated.

Table I - PRODUCTION AND DOMESTIC DISAPPEARANCE OF CREAMERY, DAIRY AND TOTAL BUTTER

In Canada, July, and Cumulative January-July, 1935-1947.

	Creamery Butter		Dairy Butter 1/		Total Butter 2/	
	July	Jan.-July	July	Jan.-July	July	Jan.-July
PRODUCTION						
	'000 lb.	'000 lb.	'000 lb.	'000 lb.	'000 lb.	'000 lb.
1935	37,071	135,718	7,981	61,559	45,237	198,025
1936	37,284	143,517	7,828	60,206	45,321	204,572
1937	36,012	140,783	7,720	59,066	43,984	200,883
1938	38,858	152,312	7,526	57,270	46,637	210,618
1939	38,058	152,400	7,225	55,035	45,535	208,470
1940	39,699	154,218	6,942	53,062	46,921	208,430
1941	39,095	166,057	6,808	52,183	46,204	219,470
1942	40,343	159,966	6,473	49,474	47,192	210,981
1943	44,445	186,550	4,614	34,775	49,414	222,493
1944	41,526	177,446	4,433	34,369	46,368	213,228
1945	42,509	176,709	4,285	33,476	47,280	211,874
1946	41,000	165,076	4,332	34,150	45,700	200,476
1947	42,240	167,931	4,511	35,264	47,141	204,298

DOMESTIC DISAPPEARANCE IN POUNDS PER CAPITA

1935	1.80	11.68	.71	5.67	2.53	17.42
1936	1.90	11.84	.70	5.49	2.62	17.42
1937	1.97	12.29	.69	5.34	2.68	17.72
1938	1.94	12.08	.66	5.11	2.62	17.28
1939	2.00	12.41	.63	4.90	2.65	17.41
1940	1.98	12.71	.59	4.63	2.59	17.45
1941	2.13	12.82	.58	4.53	2.73	17.46
1942	2.17	13.81	.55	4.24	2.75	18.19
1943	2.00	12.37	.37	2.92	2.40	15.39
1944	2.07	13.93	.37	2.88	2.47	16.93
1945	2.11	13.05	.35	2.77	2.50	15.94
1946	1.80	11.47	.35	2.78	2.17	14.35
1947	2.13	12.71	.37	2.87	2.52	15.67

JULY MAKE, 1935 TO 1947, EXPRESSED AS INDEXES OF THE SAME MONTH IN 1939 AND 1946 3/

	1939	1946	1939	1946	1939	1946
	%	%	%	%	%	%
1935	97.4	90.4	110.5	184.2	99.3	99.0
1936	98.0	90.9	108.3	180.7	99.5	99.2
1937	94.6	87.8	106.9	178.2	96.6	96.2
1938	102.1	94.8	104.2	173.7	102.4	102.1
1939	100.0	92.8	100.0	166.8	100.0	99.6
1940	104.3	96.8	96.1	160.2	103.0	102.7
1941	102.7	95.4	94.2	157.2	101.5	101.1
1942	106.0	98.4	89.6	149.4	103.6	103.3
1943	116.8	108.4	63.9	106.5	108.5	108.1
1944	109.1	101.3	61.4	102.3	101.8	101.5
1945	111.7	103.7	59.3	98.9	103.8	103.5
1946	107.7	100.0	60.0	100.0	100.4	100.0
1947	111.0	103.0	62.4	104.1	103.5	103.2

1/ Data for July, 1947 are preliminary; revisions for June appear on Table 7.

2/ Includes Whey Butter amounting to 367,600 pounds in July, 1946 and 390,347 pounds in July, 1947.

3/ Note the base index in each column is shown as 100.

THE DAIRY SITUATION IN CANADA

Butter Supplies: The upward trend in creamery butter production continued during the month of July, registering a 3 per cent gain over the same month last year. The stocks at August 1 did not reflect this gain in production, the holdings of 58,660,000 pounds being only 128 thousand pounds greater than those shown at the same date twelve months ago. The total supply of creamery butter available for distribution in July was approximately 85 million pounds as against 67 million pounds in June and 81 million in July, 1946. However, the disappearance increased more rapidly than supply. In the month of July the domestic disappearance of creamery butter was 26 million pounds as against 22 million pounds in the same month a year ago. On a per capita basis this amounted to 2.13 pounds for July, 1947 as compared with 1.80 pounds a year ago.

While the creamery butter dominates the supply position, consideration should also be given to dairy butter which is now being made in somewhat larger quantities. The upward movement in production has been accelerated by the removal of price restrictions; and since many patrons have a preference for this product, producers in some areas have been encouraged to increase the supply. This is particularly the case in isolated communities where producers are not being adequately served with alternative marketing outlets. In June, the peak month of the season, the output moved up to nearly 6 million pounds, an increase of approximately 5 per cent. In July, the preliminary estimate showed an increase of 4 per cent although the quantity produced dropped to $4\frac{1}{2}$ million pounds.

The analysis of the butter position shown in Table 1, reveals a total butter output (including creamery, dairy and whey butter), of approximately 47 million pounds in the month of July. This was $2\frac{1}{4}$ million pounds less than the output for the same month in 1943, the peak year of production, but $1\frac{1}{2}$ million pounds greater than that of July, 1939. For the seven-month period to date, the production of approximately 204 million pounds compared with 222 million pounds in 1943 and 208 million pounds in 1939. The increase in the July make over the same month of the preceding year was nearly $1\frac{1}{2}$ million pounds, and the cumulative production for the seven months ended July was about 4 million pounds greater than that produced in the same period of 1946.

The total supply of butter for the month of July (all classes included), amounted to approximately 90 million pounds, whereas less than 86 million pounds were available in the same month a year ago. However, the domestic disappearance also increased; it moved up to approximately 31 million pounds as against $26\frac{3}{4}$ million pounds in July, 1946. Thus, while there was a gain of 5 per cent in butter supplies, there was an increase of 16 per cent in disappearance.

Supplies of other Factory Products: Cheddar cheese production in the month of July fell to less than $22\frac{1}{2}$ million pounds, and the cumulative to date is now $67\frac{1}{2}$ million pounds. Compared with July, 1946, the former represents a decline of approximately 3 million pounds and the latter a decline of 16 million pounds. The production of cheddar cheese has just about reached the pre-war level (see Table 2), but still exceeds that of 1938.

The production of concentrated whole milk products in July moved up to approximately 32 million pounds, compared with 29 million pounds in July, 1946. Milk by-products also increased to over 10 million pounds as compared with $7\frac{1}{2}$ million pounds a year ago. With the removal of restrictions on ice cream, there has also been a considerable increase in the output of this product.

Table 2 - CHEESE PRODUCTION, EXPORTS, IMPORTS AND TOTAL SUPPLY
In Canada, July, and Cumulative January-July, 1935 to 1947

	Cheddar Cheese 1/		Other Cheese		Total Cheese 2/	
	July	Jan.-July	July	Jan.-July	July	Jan.-July
	PRODUCTION					
	'000 lb.	'000 lb.	'000 lb.	'000 lb.	'000 lb.	'000 lb.
1935	-	-	-	-	-	-
1936	22,008	58,130	-	-	22,097	58,749
1937	25,251	67,615	-	-	25,335	68,201
1938	21,679	59,830	-	-	21,757	60,375
1939	23,069	65,143	-	-	23,140	65,642
1940	25,609	74,419	175	666	25,852	75,562
1941	25,930	76,868	235	897	26,232	78,231
1942	30,740	117,199	181	691	30,987	118,350
1943	27,333	82,036	124	926	27,520	83,405
1944	28,714	96,768	166	989	28,943	98,197
1945	30,807	105,098	180	1,076	31,051	106,611
1946	25,200	83,390	386	2,583	25,649	86,411
1947	22,307	67,558	303	1,842	22,674	69,837
	EXPORTS		IMPORTS		TOTAL SUPPLY	STOCKS, AUG. 1
1935	5,361	9,515	133	642	-	29,598
1936	11,541	24,762	78	511	46,548	30,700
1937	15,071	27,712	107	811	56,013	35,508
1938	11,695	24,151	106	776	54,431	38,978
1939	12,750	28,140	55	671	61,975	45,668
1940	19,195	37,569	30	857	55,002	33,396
1941	22,362	32,964	62	497	60,353	32,374
1942	19,787	59,493	55	478	94,153	67,798
1943	5,593	46,860	58	285	71,839	51,710
1944	9,084	37,985	21	388	82,235	61,134
1945	9,269	31,020	24	247	97,065	68,773
1946	162	16,129	56	637	77,321	52,821
1947	2,795	6,129	=	=	=	48,693

JULY MAKE, 1935 TO 1947, EXPRESSED AS INDEXES OF THE SAME MONTH IN 1939 AND 1946

	1939	1946	1939	1946	1939	1946
	%	%	%	%	%	%
1935	-	-	-	-	-	-
1936	95.4	87.3	-	-	95.5	86.2
1937	109.5	100.2	-	-	109.5	98.8
1938	94.0	86.0	-	-	94.0	84.8
1939	100.0	91.5	-	-	100.0	90.2
1940	111.0	101.6	-	45.3	111.7	100.8
1941	112.4	102.9	-	60.9	113.4	102.3
1942	133.3	122.0	-	46.9	133.9	120.8
1943	118.5	108.5	-	32.1	118.9	107.3
1944	124.5	113.9	-	43.0	125.1	112.8
1945	133.5	122.3	-	46.6	134.2	121.1
1946	109.2	100.0	-	100.0	110.8	100.0
1947	96.7	88.5	-	78.5	98.0	88.4

1/ Includes other cheese produced in Quebec, 1936 to 1939.

2/ Farm-made cheese is included in data shown in this column.

- Not available

= Imports not available (see Trade Report No. 101 for data).

Fluid Sales: Estimates for the month of June reveal total sales of 364 million pounds of fluid milk and cream for direct consumption. Of this amount 299½ million pounds were sold in the form of fluid milk and 68¾ million pounds in the form of fluid cream. The former represented a decline of over 7 per cent while the latter advanced approximately 33 per cent over the same month a year ago. It is evident, therefore, that while the public are purchasing less milk, the net change is not particularly significant. June sales of milk and cream on a milk basis, were only 1½ per cent less than those of the same month of a year ago. It is expected that this strong demand for cream will continue to assert itself during the remainder of the summer period and may be expected to have a pronounced effect on the quantity of milk available for other purposes.

Milk Production: Milk production in the month of June was approximately 1 per cent less than that produced in the same month last year. The lush pasture growth in the central provinces contributed to this favourable situation; and in this section of the Dominion, the farm output was almost equal to that produced in June, 1946. A very favourable situation was revealed in Manitoba and Alberta, although both provinces showed slight declines in milk production.

The quantity of milk used in factory production though declining 2 per cent, still represented approximately the same proportion of the total output (66 per cent), as that shown in the Dominion figures a year ago. The same might be said for fluid milk sales which accounted for slightly more than 17 per cent of the total farm milk supply. An increase of 4½ per cent in the production of dairy butter was responsible for an increase in the additional volume of milk used in farm production. But, while the removal of restrictions has increased the dairy butter make, it is significant that many creameries report an increase in the quantities of creamery butter purchased by farmer-patrons.

Sales Income: During the month of May, the income obtained from the sale of dairy products represented a total of \$30,124,000 as against \$29,898,000, in the same month of 1946. The average price per hundred pounds of milk was \$2.19 as against \$2.07. Fluid milk contributed principally to this increase with an average of \$3.29 as against \$2.79 in May, 1946. There was also a slight increase in the price realized by farmers for creamery butter-fat while milk for concentration moved up from \$2.03 to \$2.18 per hundred pounds of milk.

Production Conditions on Farms: The weather in the Eastern Provinces during the month of July was inclined to be cool with less than the usual amount of sunshine. Temperatures were not substantially different from those of a year ago, but there was a considerable increase in precipitation. The usual midsummer drought did not take effect until practically the end of the month. In Western Canada, a heat wave developed around the middle of July which extended across the Prairie region, causing damage to pastures and grain crops. Manitoba and southern Saskatchewan withstood the warm weather owing to good moisture reserves, while south-western sections of the Prairie region extending as far west as Lethbridge, and west central areas north of the Red Deer and South Saskatchewan Rivers that had received inadequate moisture supplies earlier in the season, were the most seriously affected. Precipitation was only slightly below normal in British Columbia, although in the interior of the province a definite shortage of moisture was indicated.

Pasture growth was well maintained in the five Eastern Provinces and in Manitoba, the average condition in all these provinces being better than that of a year ago. A marked improvement was shown in New Brunswick and Quebec where pasture conditions exceeded the long-time average. A reverse situation was reported from the three Western Provinces, however, where pasture conditions fell considerably below the ratings of a year ago. The Saskatchewan rating fell to 72, while Alberta

Table 3 - CONCENTRATED MILK PRODUCTS

Production and Domestic Disappearance, July and Cumulative, January-July, 1935 to 1947

	Whole Milk Products		Milk By-Products		Ice Cream	
	July	Jan.-July	July	Jan.-July	July	Jan.-July
	'000 lb.	'000 lb.	'000 lb.	'000 lb.	'000 gal.	'000 gal.
1935	8,370	48,900	3,236	17,132	-	-
1936	9,245	48,110	3,192	17,169	-	-
1937	12,021	62,936	3,403	17,874	-	-
1938	13,262	81,065	4,408	21,678	-	-
1939	15,294	74,571	3,984	21,193	1,473	5,761
1940	18,416	95,458	4,161	22,460	1,794	7,009
1941	22,500	122,548	4,042	23,397	2,299	8,990
1942	24,413	130,910	4,536	25,578	2,465	9,650
1943	26,712	137,345	4,937	24,494	3,061	10,983
1944	26,820	142,066	5,867	28,249	2,821	11,253
1945	26,732	155,872	7,007	34,440	2,728	10,578
1946	28,922	153,641	7,478	36,530	2,754	10,140
1947	31,662	158,014	10,311	45,403	3,909	13,505

DOMESTIC DISAPPEARANCE IN POUNDS PER CAPITA

					gal.	gal.
1935	.40	2.89	.24	1.40	-	-
1936	.42	3.20	.30	1.54	-	-
1937	.55	3.85	.28	1.50	-	-
1938	.49	4.37	.24	1.44	-	-
1939	1.34	5.93	.29	1.86	.13	.51
1940	.65	5.68	.31	1.99	.16	.62
1941	.83	6.27	.27	2.04	.20	.78
1942	1.15	7.81	.41	2.04	.21	.83
1943	1.34	9.00	.40	1.96	.26	.93
1944	.95	7.15	.42	2.15	.23	.94
1945	1.54	8.85	.39	2.18	.23	.88
1946	1.56	9.47	.54	2.66	.22	.83
1947	1.64	9.79	.63	2.85	.32	1.10

JULY MAKE, 1935 TO 1947, EXPRESSED AS INDEXES OF THE SAME MONTH IN 1939 AND 1946 1/

	1939	1946	1939	1946	1939	1946
	%	%	%	%	%	%
1935	54.7	28.9	81.2	43.3	-	-
1936	60.4	32.0	80.1	42.7	-	-
1937	78.6	41.6	85.4	45.5	-	-
1938	86.7	45.9	110.6	58.9	-	-
1939	100.0	52.9	110.0	53.3	100.0	53.5
1940	120.4	63.7	104.4	55.6	121.8	65.1
1941	147.1	77.8	101.5	54.1	156.1	83.5
1942	159.6	84.4	113.9	60.7	167.3	89.5
1943	174.7	92.4	123.9	66.0	207.8	111.1
1944	175.4	92.7	147.3	78.5	191.5	102.4
1945	174.8	92.4	175.9	93.7	185.2	99.1
1946	189.1	100.0	187.7	100.0	187.0	100.0
1947	207.0	109.5	258.8	137.9	265.4	141.9

1/ Note that base index in each column is shown as 100.

and British Columbia, which had better than normal pasture growth in July, 1946, fell to 81 and 94, respectively. The first crop estimate based on reports made at the end of July revealed an important development in the coarse grain situation which will be of interest to dairymen. Converting the production estimates for oats and barley as published in the Crop Report of August 13th, to a tonnage basis, there would be a total harvest of 9,626,000 tons in 1947 as compared with 12,320,000 tons in 1946, a decline of 22 per cent. The combined output of the Prairie Provinces, the main source of supply, will suffer a reduction of one fifth as compared with last year; and with a still greater reduction in the quantities of home-grown grains in the other provinces, the entire feed supply position will be materially weakened. Farmers of Eastern Canada have gathered in a very heavy hay crop, although operations were seriously delayed on account of the late spring and frequent showers during the month of July. In many sections the clover was killed out by early spring frosts, and coupled with the long delay in gathering, the quality is not expected to be as good as that produced on farms a year ago.

There appears to be very little change in the numbers of milch cows on farms. The Dominion figures compiled from reports of Dairy Correspondents showed a reduction of approximately 2 per cent from that of June, 1946. Freshenings also seem to be on the decline, but the proportion of cows milking remained at 86 per cent, the same as that of June, 1946. The average production of milk per cow in the month of June was practically unchanged being 23.1 as against 23.3 pounds in the same month a year ago.

The labour situation is still causing grave concern and dairy farmers are finding it difficult to procure the class of assistance that would normally be coming forward for employment. Wages are high and farmers are endeavouring to avoid the necessity of hiring additional help during the summer months.

REVIEW OF DAIRY PRODUCTION CONDITIONS BY PROVINCES

Prince Edward Island: The output of milk in this province suffered a further reduction in the month of June, the estimated production of 18,587,000 pounds being nearly 19 per cent less than that recorded in the same month of the previous year. This reduction was reflected to a significant degree in the deliveries to dairy factories which fell off 27 per cent. Fluid milk sales dropped 9 per cent, but with a substantial increase in cream sales the combined reduction on a milk basis represented a decrease of only 5 per cent. The lack of labour on farms, a decline in the production of milk per cow combined with a substantial reduction in cow numbers were important factors causing decreased production. Comparatively dry weather prevailed throughout the greater part of the month of July, but intermittent showers maintained a verdant growth. While pastures were not exceptionally good, the general condition is better than it was a year ago. However, the late season and delayed haying operations reduced the acreage available for forage. The hay crop promises to yield a much larger tonnage than last year, although due to a lack of clover and late harvesting, the quality is below average.

Nova Scotia: A $5\frac{1}{2}$ per cent decline in milk production during the month of June as compared with the corresponding month a year ago is indicative of a general departure from dairying which has been developing this season. Factory production suffered to the greatest extent with an 8 per cent decline from last year, while fluid sales were also reduced by 6 per cent. The latter was less pronounced on account of a 55 per cent advance in cream sales; milk sales alone being reduced 11 per cent. Reports of Dairy Correspondents in the month of June indicated a 2 per cent decline in cow numbers but an increase in freshenings. There is a tendency, however, to favour cash crops and Observers report that it is easier to obtain help on fruit farms than to tend dairy herds. The month of July was characterized by comparatively warm

Table 4 - CONCENTRATED WHOLE MILK PRODUCTS
 Production, Exports and Imports of Principal Products
 July, and Cumulative, January-July, 1935 to 1947.

	Evaporated Whole Milk		Condensed Whole Milk		Whole Milk Powder	
	July	Jan.-July	July	Jan.-July	July	Jan.-July
PRODUCTION						
	'000 lb.	'000 lb.	'000 lb.	'000 lb.	'000 lb.	'000 lb.
1935	7,204	41,525	856	5,522	285	1,343
1936	8,373	41,600	558	4,410	290	1,624
1937	10,384	52,433	1,025	6,889	584	2,997
1938	11,576	70,123	972	5,841	682	4,330
1939	13,839	65,293	775	4,052	631	4,008
1940	15,517	83,143	2,114	7,133	749	4,335
1941	18,737	104,890	2,911	12,222	815	4,885
1942	20,787	111,197	2,347	12,401	1,243	6,702
1943	22,765	113,005	2,292	14,750	1,564	9,182
1944	22,116	114,795	2,762	16,893	1,801	9,781
1945	23,438	128,387	1,735	16,889	1,422	9,554
1946	24,608	126,252	2,529	17,148	1,506	8,839
1947	26,484	130,460	2,952	15,780	1,859	10,068
EXPORTS						
1935	1,867	9,747	235	1,357	383	1,831
1936	1,729	5,981	108	734	301	2,726
1937	2,847	10,562	343	2,750	248	1,677
1938	3,734	15,907	307	1,911	341	2,431
1939	2,157	14,357	42	737	353	2,883
1940	3,562	10,922	542	2,259	141	3,119
1941	5,960	26,932	2,288	7,423	500	2,857
1942	4,020	19,707	1,923	7,354	364	1,279
1943	4,792	13,965	1,964	8,984	137	972
1944	3,224	11,176	1,264	10,056	58	610
1945	3,182	26,017	1,844	11,302	375	1,639
1946	6,826	17,631	1,942	9,529	199	2,160
1947	5,028	15,627	2,289	11,517	424	1,965
	TOTAL SUPPLY	STOCKS, AUG. 1	TOTAL SUPPLY	STOCKS, AUG. 1	IMPORTS	
1935	17,444	11,814	1,668	813	5	17
1936	18,653	11,534	1,201	1,732	(2)	158
1937	21,845	13,783	3,841	2,861	(2)	379
1938	30,180	21,285	1,619	948	43	474
1939	21,825	5,497	1,266	554	5	41
1940	35,053	25,255	3,170	1,699	(2)	6
1941	46,823	32,200	3,847	1,006	(2)	326
1942	49,347	32,750	4,256	2,003	-	25
1943	41,357	22,276	4,825	2,711	126	151
1944	58,216	46,208	5,382	3,015	(2)	167
1945	69,817	49,707	5,861	3,186	(2)	19
1946	53,456	29,134	5,295	2,606	(2)	34
1947	51,801	19,414 (4)	5,934	2,605	(3)	(3)

(1) Includes stocks at the beginning of the month, plus production and imports during the month.

(2) Less than 500 lbs.

(3) Not available on date of publication.

(4) In hands of wholesalers not available.

weather, low rainfall and high humidity. Pastures are much better than was the case last year and the drought which usually strikes the Province in July was delayed by about two weeks. Consequently, the growth and condition of grass was good and the milk flow was well maintained. There was a heavy hay crop, but the yields of clover have been very disappointing. Much of it was killed out by early spring frosts. With many areas now suffering from a delayed drought, the milk production in August promises to show a greater decline than that recorded in July.

New Brunswick; A 3 per cent reduction in the output of milk was indicated in the estimate for the month of June as compared with the same month a year ago. This follows the downward trend which commenced in the month of May. Its effect was reflected in an 8 per cent drop in factory deliveries and a 2 per cent decline in fluid milk sales. Due to a heavier fat content, cream sales on a milk basis advanced approximately 46 per cent. This placed the overall estimate of milk and cream combined, at 2 per cent above that of a year ago. The production of dairy butter is now on the increase, the June estimate showing an advance of 4 per cent over the June make of 1946. The removal of price ceilings and sales restrictions has provided farmers with an opportunity to increase their income by distributing this product direct to consumers. The increase in make, however, seems to be confined largely to areas where creameries or cheese factories are not within a convenient hauling distance from farms. Reports from Dairy Correspondents indicate that fewer cows are being kept. A reduction of 3 per cent was shown in June as compared with the same month of the previous year, and freshenings were also shown to be on the decline. Despite the satisfactory pasture growth, the production of milk per cow showed quite a sharp reduction from that of June, 1946. The month of July was comparatively warm with heavy rainfall to promote pasture growth. At Fredericton, 6.38 inches was recorded as compared with 1.55 inches a year ago. The latter was considerably below normal. Pastures were maintained in excellent condition, and the hay crop promises to be almost, 20 per cent greater than last year. The corn crop has made excellent progress during the past month. However, the reduced acreage resulting from the late season will provide smaller supplies of home-grown grains for winter use. The excessive heat promises to cause deterioration of pastures in August and a more pronounced decline in the production of milk is anticipated.

Quebec; Milk production is being well maintained in this province. The output of approximately 651 million pounds estimated for the month of June was only three-quarters of one per cent less than that of a year ago. This favourable position was reflected in fluid sales and in the production of farm-made products. Fluid sales were even with the same month last year while farm-made products, principally dairy butter, advanced 10 per cent. Although fluid milk sales dropped 6 per cent, fluid cream sales on a milk basis were nearly 38 per cent greater than those of a year ago. Cow numbers were approximately the same as last year and the milk production per cow also corresponds closely with that reported in June, 1946. While warm weather prevailed during the month of July, the abundant precipitation kept pasture growth in an excellent condition. Reports from Crop Correspondents revealed a rating of 101 in July as against 80 per cent of normal in the same month last year. While pests were more plentiful this year, less harm was done to dairy cattle on account of approved preventative measures now being applied. The shortage of labour still places a limitation on the production of dairy products although the situation is not as serious as in 1946. Indications point to a fairly satisfactory milk supply in August, although the effects of hot weather are likely to be more pronounced than in the two previous months.

Ontario; The farm output of milk in June, amounting to 729 million pounds was almost equal to that produced in the corresponding month of 1946. With approximately the same amount of milk available, fluid milk sales fell 7 per cent, while creamery butter production moved up 6 per cent. Fluid cream sales used nearly 6

Table 5 - CONCENTRATED MILK BY-PRODUCTS
 Production, Exports and Imports of Principal Products
 July, and Cumulative, January-July, 1935 to 1947

	Skim Milk Powder		Condensed Skimmilk		Casein	
	July	Jan.-July	July	Jan.-July	July	Jan.-July
PRODUCTION						
	'000 lb.	'000 lb.	'000 lb.	'000 lb.	'000 lb.	'000 lb.
1935	2,318	11,528	463	2,943	156	867
1936	2,224	11,378	471	2,863	147	829
1937	2,356	11,397	501	3,110	173	1,197
1938	3,160	14,773	485	3,027	221	975
1939	2,967	15,530	401	1,579	171	1,228
1940	3,172	16,450	309	2,299	158	1,040
1941	3,066	17,128	341	2,651	127	759
1942	3,072	17,221	437	3,423	412	2,000
1943	2,896	14,737	388	2,554	477	1,837
1944	3,860	18,024	419	2,569	432	1,768
1945	4,980	24,074	394	2,569	464	2,292
1946	5,329	26,555	298	1,905	611	2,290
1947	7,547	31,991	341	2,737	908	3,530
EXPORTS			IMPORTS (1)			
1935	128	610	-	-	1	40
1936	100	909	-	-	11	80
1937	83	559	-	-	1	142
1938	148	569	-	-	3	128
1939	103	1,873	-	-	156	513
1940	119	588	-	-	239	1,412
1941	90	441	-	-	1	685
1942	49	244	-	-	536	1,212
1943	64	349	-	-	25	89
1944	-	21	-	-	3	471
1945	1,447	1,947	-	-	1	51
1946	154	1,017	-	-	2	88
1947	2,539	4,687	-	-	(2)	(2)
DOMESTIC DISAPPEARANCE IN POUNDS PER CAPITA						
1935	.17	.95	.03	.22	.01	.07
1936	.20	.97	.05	.28	.02	.10
1937	.19	.94	.05	.27	.01	.11
1938	.16	.94	.04	.23	.01	.08
1939	.19	1.29	.03	.15	.03	.13
1940	.22	1.33	.03	.19	.02	.21
1941	.18	1.41	.04	.23	.01	.13
1942	.24	1.27	.05	.29	.06	.22
1943	.24	1.13	.03	.21	.03	.17
1944	.26	1.31	.03	.19	.03	.17
1945	.27	1.51	.04	.20	-	.10
1946	.40	1.90	.02	.16	.01	.12
1947	.40	1.81	.03	.22	.07	.26

(1) Condensed skimmilk is not separately listed in import returns. Condensed milk designated as such shown in trade reports consists principally of condensed whole milk products.

(2) Not available at date of publication.

million pounds more milk, making an advance of 41 per cent over the June sales a year ago. The diversion of milk into the fluid cream channel produced a net decline of only 2 per cent in the sales of the two products combined. With a substantial drop in the production of cheese, the deliveries of milk to dairy factories for all purposes was slightly greater than that of June, 1946. The holdings of milch cows in June were only 2½ per cent below those of the same month last year. In May, there was a decline of nearly 4½ per cent. July was a favourable month for dairying, and frequent rains kept pastures in a good condition. At Ottawa, 8.14 inches of rain were recorded as against 7.80 inches a year ago and a normal of 5.65 inches. The temperatures were about the same but there were fewer hours of sunshine. Haying is just about completed although operations were greatly delayed by wet weather. The tonnage will be considerably above last year, but the quality promises to fall below average. The grain crop is spotty and the quantity of grains will be very considerably reduced from last year. The prospects for milk production in August are less favourable on account of warm weather and drought.

Manitoba: Milk production in this province is being well maintained despite a substantial reduction in cow numbers as compared with June, 1946. The farm output this June was within 1 per cent of that produced a year ago, but the milk supply was differently utilized. Total fluid sales remained unchanged; and while milk sales declined 6 per cent, cream sales advanced 24 per cent. Factory production suffered a 2 per cent decline while the production of dairy butter moved upward in exactly the same degree. With a substantial fall-off in freshenings, the numbers of cows on farms fell 6 per cent below those of June, 1946, but the production of milk per cow remained almost equal to that of a year ago. There was a great deal of hot weather in July and the rainfall was considerably below requirements. Nevertheless, moisture reserves were sufficient to keep pastures fairly green, so that dairy herds did not suffer materially from a lack of forage. Flies and pests were quite bad this season and may have had an adverse effect on production. Labour is still scarce and probably placed some limitations on dairying operations. The production situation is not expected to show any great change in the course of the next two months.

Saskatchewan: Milk production in this province showed approximately the same relationship to last year as that of a month ago. The 218 million pounds estimated for the month of June was 3 per cent less than that of June, 1946. The general diversion from milk to cream sales, noted in other provinces, was reflected in the figures. Milk sales fell 3 per cent while cream sales increased 10 per cent. Milk used in factory production declined 4½ per cent from last year. Observers report that greater quantities of dairy butter are being made in certain isolated areas where transportation is inadequate. In other districts there is a tendency to make less butter and to purchase creamery butter. The net result is that very little change has occurred, the estimated output being only 1 per cent more than last year. Cow numbers dropped 4 per cent in June and there appears to be no indication that the situation will improve in future months. The milk production per cow was slightly reduced. A devastating heat wave which injured pastures and caused premature ripening of grain crops, swept across the Prairies about the middle of July. In the extreme south-west and in the west-central areas north of the Saskatchewan River, a drought condition has persisted throughout the season. In these areas pastures have been dried up and the feed prospects are exceedingly grim. Southern Saskatchewan received more adequate supplies of rain, and while forage crops suffered from the extreme heat wave, the general condition was very little below normal. It will be observed from Table 10 that the condition of pastures for the province as a whole fell to 72 as compared with 82 a year ago. Subsequent rains have improved the situation, but in the low-rainfall areas, the season is now too far advanced for any substantial recovery to take place.

Table 6. - PRODUCTION OF MILK PER COW AND PERCENTAGES OF COWS MILKING
Reported by Dairy Correspondents, for June 1943 to 1947.

Province	Milk production per cow in pounds per day						Percentage of Cows Milking					
	1943	1944	1945	1946	1947	Av.	1943	1944	1945	1946	1947	Av.
CANADA	22.0	21.0	23.0	23.3	23.1	22.5	86.1	84.8	86.5	87.5	86.2	86.2
Prince Edward Island.	19.8	19.8	22.7	24.2	22.5	21.8	87.5	80.0	86.9	91.2	90.2	87.2
Nova Scotia	22.1	19.7	21.7	22.6	22.1	21.6	89.5	82.0	88.2	88.8	85.9	86.9
New Brunswick	18.0	21.3	23.9	25.4	19.6	21.6	90.2	87.9	91.5	90.4	81.6	88.3
Quebec	23.0	21.8	23.6	23.6	23.7	23.1	93.2	89.9	93.7	92.9	92.6	92.5
Ontario	24.3	21.8	26.0	25.9	25.7	24.7	88.9	85.6	86.1	89.8	87.2	87.5
Manitoba	17.8	18.6	20.3	21.3	21.0	19.8	79.0	80.4	80.0	80.3	82.8	80.5
Saskatchewan	18.7	20.1	22.8	20.5	19.6	20.3	74.2	80.1	82.9	81.2	79.3	79.5
Alberta	23.0	20.0	20.3	22.2	22.5	21.6	76.7	80.0	79.2	80.8	82.8	79.9
British Columbia	19.4	21.6	22.9	22.8	22.8	21.9	85.2	83.4	82.7	84.2	85.2	84.1

Table 7. - PRODUCTION OF DAIRY BUTTER AND WHEY BUTTER IN CANADA
By Provinces, June, 1945, 1946 and 1947.

Province	DAIRY BUTTER			WHEY BUTTER		
	1945	1946	1947	1945	1946	1947
	'000 lb.	'000 lb.	'000 lb.	lb.	lb.	lb.
CANADA	5,656	5,686	5,946	403,826	351,720	299,708
Prince Edward Island.	58	58	64	-	-	-
Nova Scotia	256	256	261	-	-	-
New Brunswick	528	539	561	-	-	-
Quebec	899	872	959	46,700	50,596	21,724
Ontario	1,160	1,125	1,204	347,789	294,739	270,996
Manitoba	544	571	582	6,977	2,826	4,502
Saskatchewan	1,249	1,311	1,324	-	-	-
Alberta	828	816	849	455	2,018	1,568
British Columbia	134	138	142	1,905	1,543	918

Alberta: The quantity of milk produced in June amounted to approximately 191 million pounds, a decline of three-quarters of one per cent from the same month last year. This situation was reflected in the quantities of milk used in dairy factories, while fluid sales fell off 4 per cent. Milk sales, represented in the latter, dropped 12 per cent as against an increase of 30 per cent in cream sales on a milk basis. With fewer cows on farms (June reports showed a reduction of 3 per cent from last year), and little change in freshenings, there is no indication of any substantial improvement in future months. In fact, a more pronounced reduction may occur as pasture growth becomes depleted. The relatively satisfactory situation which has prevailed so far this season, may be credited to a greater percentage of cows milked and good pasture growth during the month of June. A reverse situation developed in July when a devastating heat wave materially affected the forage in south-eastern Alberta and in the east-central area north and south of the Red Deer River. The average condition of pastures in the province fell to 81 per cent of normal as compared with 101 in the same month a year ago.

British Columbia: Total milk production in the month of June fell to approximately 81 million pounds, or 5 per cent less than that recorded in the same month of a year ago. There was a decline of $5\frac{1}{2}$ per cent in factory production and a decrease of 6 per cent in fluid sales. Milk sales dropped 15 per cent, while fluid cream sales advanced 20 per cent. There appears to be very little change in the numbers of cows on farms, but fewer cows were freshened in the month of June than in the same month last year. A greater percentage of cows were milked, and the production of milk per cow was about equal to that of a year ago. There seemed to be sufficient rain in July throughout the lower mainland, but the condition of pastures in the province as a whole fell to 94 as compared with 101 in July, 1946. The interior and border sections of British Columbia suffered to the greatest extent from the midsummer heat. Observers indicate that milk production might be expected to continue in a downward direction.

Table 8. - MILK PRODUCTION AND UTILIZATION IN CANADA, BY PROVINCES
June, 1945, 1946 and 1947

(Section A)

	Total Milk Production	Factory Production						Farm Production	
		1	2	3	4	5	6		
		Creamery Butter	Factory Cheese	Conc. Milk	Ice Cream	Dairy Butter	Farm Cheese		
	'000 lb.	'000 lb.	'000 lb.	'000 lb.	'000 lb.	'000 lb.	'000 lb.		
CANADA	1945	2,205,364	1,033,193	368,333	83,733	31,581	132,521	709	
	1946	2,147,177	991,628	316,663	86,450	29,081	133,224	708	
	1947	2,120,565	1,010,489	253,330	91,204	43,799	139,315	708	
P.E.I.	1945	24,883	15,628	2,395	-	129	1,359	1	
	1946	22,859	14,480	1,448	-	86	1,359	1	
	1947	18,587	10,450	1,092	-	129	1,500	1	
N.S.	1945	51,788	25,258	-	1,638	2,001	5,998	28	
	1946	49,839	23,524	-	2,120	1,386	5,998	28	
	1947	47,081	21,181	-	1,685	2,015	6,116	28	
N.B.	1945	58,094	28,842	2,774	-	886	12,371	4	
	1946	56,389	27,975	1,883	-	772	12,629	4	
	1947	54,617	26,265	913	-	1,100	13,144	4	
Que.	1945	671,611	339,009	125,859	22,360	6,516	21,064	28	
	1946	655,779	340,414	95,693	24,056	6,474	20,431	28	
	1947	650,997	368,273	56,419	27,188	8,217	22,469	28	
Ont.	1945	753,257	256,886	222,009	49,648	13,232	27,179	145	
	1946	728,969	235,706	204,419	50,586	12,732	26,359	145	
	1947	728,792	250,045	181,506	52,563	20,192	28,210	145	
Man.	1945	156,455	95,805	7,405	-	2,472	12,746	112	
	1946	152,910	92,853	6,218	-	1,872	13,379	111	
	1947	151,226	89,549	6,713	-	2,529	13,636	111	
Sask.	1945	227,962	134,840	1,025	-	1,515	29,264	134	
	1946	224,595	128,607	969	-	1,315	30,717	134	
	1947	217,775	121,977	858	-	2,229	31,021	134	
Alta.	1945	196,404	115,299	5,875	4,180	2,044	19,400	212	
	1946	192,083	110,098	5,175	3,909	1,972	19,119	212	
	1947	190,779	108,012	5,116	4,125	2,915	19,892	212	
B.C.	1945	64,910	21,626	991	5,907	2,786	3,140	45	
	1946	63,754	17,971	858	5,779	2,472	3,233	45	
	1947	60,711	14,737	713	5,643	4,473	3,327	45	

Table 8. - MILK PRODUCTION AND UTILIZATION IN CANADA, BY PROVINCES
June, 1945, 1946 and 1947

(Section B)

		7	8	9	10	1-4	5-6	7-10	
		Milk Otherwise Used				Recapitulation			
		Fluid Milk	Fluid(1) Cream	Farm-Home Consumed	Fed to Livestock	Factory Production	Farm Production	Otherwise Used	
	'000 lb.	'000 lb.	'000 lb.	'000 lb.	'000 lb.	'000 lb.	'000 lb.		
CANADA	1945	286,978	50,030	141,209	77,077	1,516,840	133,230	555,294	
	1946	318,269	51,833	141,640	77,681	1,423,822	133,932	589,423	
	1947	295,250	68,760	139,879	77,831	1,398,822	140,023	581,720	
P.E.I.	1945	1,484	273	2,476	1,138	18,152	1,360	5,371	
	1946	1,557	341	2,426	1,161	16,014	1,360	5,485	
	1947	1,416	387	2,474	1,138	11,671	1,501	5,415	
N.S.	1945	9,819	1,232	4,107	1,707	28,897	6,026	16,865	
	1946	10,156	895	4,025	1,707	27,030	6,026	16,783	
	1947	8,999	1,389	3,944	1,724	24,881	6,144	16,056	
N.B.	1945	6,220	630	5,173	1,194	32,502	12,375	13,217	
	1946	6,044	601	5,251	1,230	30,630	12,633	13,126	
	1947	5,914	864	5,146	1,267	28,278	13,148	13,191	
Que.	1945	94,466	16,396	27,750	18,163	493,744	21,092	156,775	
	1946	104,875	17,073	28,027	18,708	466,637	20,459	168,683	
	1947	98,461	23,487	27,747	18,708	460,097	22,497	168,403	
Ont.	1945	115,990	14,233	39,509	14,426	541,775	27,324	184,158	
	1946	130,527	14,021	39,904	14,570	503,443	26,504	199,022	
	1947	121,924	19,733	39,904	14,570	504,306	28,355	196,131	
Man.	1945	12,681	3,700	12,418	9,116	105,682	12,858	37,915	
	1946	13,780	3,584	12,542	8,571	100,943	13,490	38,477	
	1947	12,912	4,452	12,667	8,657	98,791	13,747	38,688	
Sask.	1945	11,029	3,228	28,021	18,906	137,380	29,398	61,184	
	1946	12,196	3,772	27,601	19,284	130,891	30,851	62,853	
	1947	11,815	4,153	26,497	19,091	125,064	31,155	61,556	
Alta.	1945	16,902	4,225	18,113	10,154	127,398	19,612	49,394	
	1946	18,883	4,357	18,204	10,154	121,154	19,331	51,598	
	1947	16,641	5,669	17,840	10,357	120,168	20,104	50,507	
B.C.	1945	18,387	6,113	3,642	2,273	31,310	3,185	30,415	
	1946	20,251	7,189	3,660	2,296	27,080	3,278	33,396	
	1947	17,168	8,626	3,660	2,319	25,566	3,372	31,773	

(1) Cream expressed as milk.

Table 9. - FARM INCOME FROM DAIRYING AND PRICE AVERAGES PER HUNDRED POUNDS OF MILK
By Provinces and By Products, May 1946 and 1947

	Income		Price		Income		Price	
	1946	1947	1946	1947	1946	1947	1946	1947
	TOTAL INCOME				(1) FLUID SALES (MILK ONLY)			
	\$ 000	\$ 000	\$	\$	\$ 000	\$ 000	\$	\$
CANADA	29,898	30,124	2.07	2.19	9,004	9,841	2.79	3.29
P.E.I.	201	186	1.93	2.07	38	47	2.34	3.03
N.S.	757	741	2.35	2.35	359	336	3.28	3.26
N.B.	599	633	2.15	2.20	197	193	3.14	3.22
Que.	9,095	9,630	2.04	2.20	2,687	3,186	2.61	3.34
Ont.	11,826	11,473	2.22	2.31	3,791	4,116	2.82	3.31
Man.	1,752	1,760	1.87	1.95	371	351	2.85	2.95
Sask.	2,128	2,071	1.74	1.86	326	358	2.73	3.22
Alta.	2,137	2,284	1.83	1.92	547	595	2.67	3.12
B.C.	1,353	1,346	2.35	2.52	688	659	3.23	3.47
	(2) FLUID CREAM				(3) MILK FOR CONCENTRATION			
CANADA	916	1,334	1.75	1.96	1,515	1,591	2.03	2.13
P.E.I.	4	7	1.66	2.21	-	-	-	-
N.S.	13	32	1.56	1.87	28	25	2.10	2.57
N.B.	10	26	1.53	2.21	-	-	-	-
Que.	313	431	1.80	1.83	403	482	2.14	2.28
Ont.	263	394	1.69	2.00	399	333	2.01	2.15
Man.	62	106	1.89	2.40	-	-	-	-
Sask.	50	68	1.50	1.74	-	-	-	-
Alta.	81	112	1.74	1.76	60	69	1.80	1.98
B.C.	115	158	1.87	2.32	125	132	1.95	2.11
	(4) CHEESE MILK				(5) ICE CREAM			
CANADA	4,317	2,920	2.22	2.09	470	721	1.95	2.18
P.E.I.	4	5	1.77	1.96	2	4	1.90	2.12
N.S.	-	-	-	-	25	39	2.11	2.16
N.B.	24	21	2.04	1.96	13	19	1.93	2.27
Que.	379	535	1.99	1.96	101	148	2.03	2.29
Ont.	3,200	2,172	2.31	2.16	202	288	1.92	2.18
Man.	99	90	2.08	1.90	27	35	1.77	1.83
Sask.	12	6	1.90	1.80	21	42	1.77	1.89
Alta.	81	78	1.94	1.82	27	54	1.78	2.06
B.C.	18	13	1.95	1.83	52	92	2.13	2.42
	(6) CREAMERY BUTTER-FAT				(7) DAIRY BUTTER			
CANADA	13,220	13,103	50.6	51.1	456	614	40.3	46.0
P.E.I.	152	119	53.4	52.6	1	4	40.0	47.0
N.S.	310	269	53.4	52.6	22	40	42.0	47.0
N.B.	334	318	53.3	53.6	21	56	41.0	48.0
Que.	4,553	4,591	52.5	52.5	154	257	40.0	47.0
Ont.	3,445	3,549	52.6	52.4	26	71	42.0	47.0
Man.	1,130	1,134	48.0	49.8	13	44	37.0	44.0
Sask.	1,606	1,523	46.5	48.4	113	74	40.0	43.0
Alta.	1,319	1,330	46.3	47.2	72	46	40.0	43.0
B.C.	321	270	49.1	49.0	34	22	40.0	47.0

Government subsidies and Bonuses are Represented in Income and Price Data.

Table 10. PASTURE CONDITIONS IN CANADA, BY PROVINCES, JUNE AND JULY, 1943 TO 1947.

Province	June						July					
	1943	1944	1945	1946	1947	Av.	1943	1944	1945	1946	1947	Av.
CANADA	104	94	99	93	99	98	104	90	99	82	97	94
Prince Edward Island	86	107	104	99	88	97	102	104	106	76	79	93
Nova Scotia	95	92	107	92	102	98	101	79	101	78	96	91
New Brunswick	96	95	101	86	98	95	95	88	102	77	101	93
Quebec	108	88	103	93	99	98	111	90	103	80	101	97
Ontario	106	97	97	94	99	99	106	91	102	83	98	96
Manitoba	102	104	94	69	102	94	105	102	99	87	98	98
Saskatchewan	98	107	82	84	91	92	85	93	75	82	72	81
Alberta	95	89	84	108	102	96	85	83	65	101	81	83
British Columbia ...	96	97	98	106	101	100	90	83	92	101	94	92

CALENDAR OF IMPORTANT HAPPENINGS

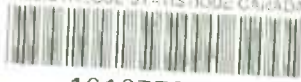
June 9: Effective as at this date, Butter Rationing Order No. 465 was rescinded by the Wartime Prices and Trade Board.

June 9: Board Order No. 701 covering the priority sales of evaporated milk was revoked.

July 31: Feed grain subsidies amounting to 10 cents per bushel on oats and 25 cents per bushel on barley are to be continued according to an announcement made by Honourable Ernest Bertrand, Acting Minister of Agriculture. The following statement was released for publication:

"The need for continuing the payment of subsidies on feed grain has been reviewed. Having in mind the present disappointing crop prospects and the delayed harvesting of the hay crop in Eastern Canada, the Government has given assurance that payment of subsidies on feed wheat, oats and barley will not be withdrawn until the ceilings on all major animal products are removed. It should be understood also that, as previously announced by the Minister of Agriculture, provision has been made by the Government for the continued payment of freight assistance in accordance with present regulations until July 31st, 1948."

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