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Ottawa, July 3, 1925, 4 p.m. The Dominion Bureau of Statistics reports the receipt of the following telegrams on the condition of crops in Canada at the end of June.

NOVA SCOTIA.- From the Dominion Experimental Farm at Kentville, June 30: "June rains abundant for grass lands and indicate normal hay crops. Pastures excellent. Cereal crops good. Corn fair. Roots and potatoes making bigger start. Apples set fair to good. Strawberry season started with prospects fair to good. Yields of plums and cherries light to fair." Amherst: "June has been exceptionally wet; rain recorded on thirteen days. All crops have made splendid growth to date but excessive rainfall if continued will be detrimental to grain, particularly barley and wheat. It has been impossible to keep weeds under control in hoed crops. Hay prospects excellent; pastures good."

NEW BRUNSWICK.- From the Dominion Experimental Farm at Fredericton, June 30: "Good growing conditions since June 15. Good stand of grass and clover; hay short owing to unfavourable weather in May and first half of June. Apples good set; strawberries promising. Turnips and vegetables damaged by cutworms; corn and sunflowers promising; grain promising, splendid colour."

QUEBEC.- From the Quebec Bureau of Statistics, June 30: "Seeding which was delayed by the cold and the spring rains, was completed between the end of May and June 8. Cattle have been at pasture since the beginning of June. Pastures and meadows are very fine. On the other hand rain has caused appreciable damage in some districts to fodder corn, corn for husking and root crops. Otherwise the general appearance of the crops is good."

ONTARIO.- Fall wheat is reported as in good condition and heading out nicely. Western and central Ontario have suffered to some extent from drought, but the damage is not material. In other parts of the province there have been abundant rainfalls and the crops are in excellent condition.

MANITOBA.- From the Manitoba Department of Agriculture, June 26: "June abnormally wet over all Manitoba. Crops on high land making very rank growth, and look well. Lower lands suffering somewhat. Rains curtailed late seeding. Luxurious pastures. Butter-make large. Plant growth well advanced. Fall rye headed some time." Dominion Experimental Farm, Brandon, June 30: "Rain has fallen on 18 days in June. Crops generally have grown rapidly. Some damage from flooding. In some districts re-seeding was necessary on a number of fields due to cutworm damage." Morden: All crops excellent. Wheat heading out. Some leaf rust. Hay good."

SASKATCHEWAN.- From the Saskatchewan Department of Agriculture, July 2: "With good growing weather during June and heavy precipitation crops have made good progress and are generally in healthy condition, except in some districts in southwest where hot winds have done some damage. Most of wheat coming in to shot blade. Very little hail damage has occurred. Considerable injury from cutworms as reported previously." Dominion Experimental Station, Swift Current, June 30: "Due to hot weather and light rainfall crops generally much farther advanced than average. Wheat on fallow seeding. Other land dry and crops suffering. Hay crops fair. Corn making good growth. Another week of dry weather will seriously damage all grain crops."

ALBERTA.- From the Department of Agriculture, June 26: "Crop conditions throughout province are generally satisfactory. The precipitation in most districts is better than for some years. The weather has been continuously warm with rainy intervals. Hail storm has done slight damage in several districts. Serious damage by worms in east central

portion and few districts in southeast. The yield in these districts will be only 40 p.c. of seeding area. Considerable portions have been reseeded to other crops. A big increase of fodder crops in southern districts. New sugar beet crop in the south doing well. Owing to abandonment of large wheat area in the southeast parts, the general increase of the wheat acreage is small."

BRITISH COLUMBIA.-- From the British Columbia Department of Agriculture June 30: "Fine warm rains during early part of June greatly benefited all crops. Grain crops in most sections are looking excellent. The earlier sowings are now well out in head. Haying general and yields will be considerably better than last year. Cattle in good condition and pasturage fairly good. Outworms reported in several districts."

THE WORLD'S WHEAT SITUATION.

Fairly complete figures are now available as to the areas sown to winter wheat for the harvest of 1925. In Europe the large wheat-growing countries of France and Italy show an increase of about 2 or 3 p.c. but in Spain there is a decrease of nearly the same proportion. In April the figures available showed that the total areas under winter wheat, including those in Europe and America, had increased by 4 p.c., as compared with 1924 and by 3.8 p.c., as compared with the five-year average, but the revised figures of May show that instead of an increase the total area has decreased by 0.8 p.c., as compared with 1924, and by 0.6 p.c., as compared with the average, the change being principally due to the large abandonment of areas winter killed in the United States. The latest totals of the areas under winter wheat are therefore 132,223,700 acres in 1925, as against 133,288,400 acres in 1924, and 133,074,800 acres, the average from 1919 to 1923. As the winter crops constitute nearly three-quarters of the total area under wheat, we may conclude that so far as area goes there will not be any considerable difference between the two years 1924 and 1925.

As regards production, the indications are that the European crops will on the whole prove decidedly better than those of 1924; but the influence which these conditions may exercise are likely to be counteracted by others in the exporting countries. Up to the present, production estimates have been issued by the International Institute for Italy (224,137,000 bushels, as against 170 million bushels in 1924), Poland (47 million bushels, as against 32 million bushels), Bulgaria (43½ million bushels, as against 28.3 million bushels) and Spain (129,044,000 bushels, as against 122,883,000 bushels). It is also estimated that the French wheat crop will be about 312 million bushels, as against 282 million bushels in 1924, and that Hungary's crop will be 62,400,000 bushels as against 50 million bushels. These countries all show a considerable increase as compared with 1924 and may be taken as indicating the general trend for European countries. On the other hand the estimates for the United States (661 million bushels as against 873 million bushels in 1924) and India (328,608,000 bushels against 364,148,000 bushels) show a decided decrease; so that including North Africa (Algeria, French Morocco and Tunis) the estimated yield of which is 104 million bushels, as compared with 47,705,000 bushels in 1924, the total yield reported to date for 11 countries is 1,911,689,000 bushels, as compared with 1,970,036,000 bushels in 1924, a decrease of 58,347,000 bushels. For Russia estimates published by Broomhall place the expected surplus for export at about 4.8 million tons, but this includes all grains, and there appears to be no information at present respecting wheat alone.

The salient features of the existing situation are therefore the comparatively small crops of India and of the United States, which must apparently reduce the exportable surpluses of those countries to negligible proportions. With a total crop of 372,660,000 bushels in 1923, the total exports of wheat and flour from India for the 12 months ended July 31, 1924, were 20½ million bushels. Doubtless the quantity available for export from India depends upon the yield from other crops, principally rice, but with a yield in 1925 of 228½ million bushels, or 44 million bushels less than in 1924, it does not appear likely that India this year will have any considerable surplus for export. Possibly the situation as regards the wheat production of the United States may improve and strong opinions are held to this effect in certain quarters; but should the present anticipated yield of 661 million bushels be not materially increased, it appears as if the

United States will have little if any surplus for export. This creates a new factor in the world's wheat situation, because the exports from the United States used to exceed 200 million bushels. The actual exports for the year ended July 31, 1924, were 91,100,000 bushels, as compared with 148,826,000 bushels in 1923. For the five years ended June 30, 1924, the annual average exports of wheat and flour amounted to 248,740,000 bushels, against which must be set the imports, averaging for the same period 26,997,000 bushels. The home requirements of the United States for food, seed and reserves may be placed approximately at 650 million bushels, which if the final output of this year's harvest should not exceed the latest estimate of 661 million bushels, leaves only about 11 million bushels for export. As stated in the U.S. Crop report of the 9th instant, the requirements of wheat for domestic consumption do not greatly differ from the estimated production.

These facts render therefore the forthcoming Canadian wheat harvest of peculiar interest. With special inducements on account of good prices to increase the acreage under this crop, it does not appear likely that there will be any very great difference between the area sown this year and that of 1924. The Bureau's preliminary estimate of areas sown, based upon the returns of crop correspondents on June 30 will be published on July 10. Meanwhile the provincial government reports have indicated a decrease in area for Manitoba and an increase amounting to about 10 p.c. in Alberta. In the latter province, however, the damage done by cutworms in certain districts has been so great that areas sown to wheat have had to be reseeded to other crops and the increased area under wheat is not now therefore expected to be large. On ~~May~~ 30 the numerical condition of wheat throughout Canada, as reported by crop correspondents, averaged 102 p.c. of the decennial yield, the condition thus representing, upon an acreage equal to that of last year, a total yield of about 350 million bushels, or 10 million bushels above the annual average of 340 million bushels for the five years 1920-24. Splendid rains have fallen this year in the west during the critical period of growth, and, should favourable conditions continue, the yield may well be considerably larger than that above indicated. On the other hand, there is always risk of rapid deterioration. The crops of Argentina and Australia are uncertain factors for the future, but the practical elimination of the United States as an exporting country next year points to a likelihood of the maintenance of good prices from which Canada should benefit to the extent of her exportable surplus. This, roughly, is the amount by which her home requirements of about 100 million bushels may be exceeded.

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