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CANADIAN GRAIN ESTIMATES: Canada's 1948 wheat crop is now placed at 391,000,000 bushels, according to the second estimate by the Bureau of Statistics. This production is being obtained from an estimated seeded area of 24,100,000 acres yielding at the rate of 16.2 bushels per acre. Oat production is currently estimated at 361,700,000 bushels, barley at 157,100,000, rye at 26,600,000 and flaxseed at 17,700,000, with the outturn of hay and clover being placed at 15,700,000 tons, and alfalfa at 3,100,000 tons.

The second estimates of production of grain crops are, in general, higher than the estimates released on August 17. Exceptionally good maturing and harvesting weather prevailed quite generally throughout August and accounts largely for the enhanced production prospects.

The wheat crop of 391,000,000 bushels exceeds the 1947 outturn by some 50,000,000 bushels but is about 16,000,000 below the 10-year, 1938-47 average production. In the Prairie Provinces the wheat crop is now expected to reach 358,000,000 bushels as compared with 319,000,000 in 1947 and 383,000,000 for the 10-year average.

Canada's 1948 oat crop, now estimated at 361,700,000 bushels is 30 per cent greater than the 1947 outturn of 278,700,000 bushels, but is 12 per cent below the 10-year average of 410,700,000 bushels. The increase over 1947 is particularly heavy in Ontario where production is expected to reach 78,700,000 bushels, the largest oat crop that province has harvested since 1942.

Barley production at 157,100,000 bushels in 1948 is 15,700,000 above the 1947 outturn of 141,400,000 and compares favourably with the 10-year average of 153,800,000 bushels.

The combined output of fall and spring rye is placed at 26,600,000 bushels, a little more than double the 1947 crop -- most of the increase being attributable to the much larger acreage sown for the 1948 harvest.

The 1948 flaxseed crop is now estimated at 17,700,000 bushels, some 300,000 bushels less than in the August estimate. An outbreak of rust in south-western Manitoba has caused a reduction of 1,000,000 bushels in the estimated flax crop for that province but this has been offset in large part by increases in the probable flax yields in Alberta and Saskatchewan.

Production of dry peas is placed at 1,646,000 bushels, down somewhat from the 1947 crop of 1,788,000 bushels. Increased yields per acre have served to largely offset a fairly sharp decline in acreage. The 1948 dry bean crop at 1,731,000 bushels exceeds last year's 1,446,000 bushels by a good margin. In this crop the effect of a decrease in acreage has

been more than offset by higher yields per acre.

The estimated 1948 outturn of shelled corn at 12,869,000 bushels is nearly double the 1947 crop. If the present estimate is realized, the 1948 corn crop will be Canada's largest since 1942 when 14,400,000 bushels were harvested. Ontario will account for almost all the 1948 corn production.

With both the all-Canada acreage and yield in excess of 1947 levels the 1948 outturn of potatoes is placed at 50,800,000 cwt., an increase of 5,700,000 cwt. over the 1947 crop. Average production for the 10-year period (1938-47) amounted to 41,900,000 cwt. If the current 1948 estimate is realized, Canada will harvest the largest potato crop since 1931 when production reached 52,300,000 cwt.

Sugar beet production for 1948 is currently placed at 611,000 tons, slightly above the 1947 crop of 605,600 tons.

The present estimate places the all-Canada outturn of hay and clover at 15,700,000 tons and alfalfa at 3,100,000 tons. Comparative figures for 1947 were 16,200,000 tons and 2,600,000 tons, respectively. Fodder corn production in 1948 is placed at 5,000,000 tons, well above the 1947 figure of 3,900,000.

The acreage seeded to buckwheat declined considerably from 1947 and, despite higher yields, production is placed at only 4,300,000 bushels compared to last year's 5,200,000. Acreages and yields of mixed grains are sharply above 1947 levels with the result that 1948 production is expected to reach 62,700,000 bushels, far above the 1947 crop of 34,900,000. The 1948 production of turnips and mangels for live-stock feed, excluding the Prairie Provinces for which data are not currently available, is placed at 22,200,000 cwt. as against 21,000,000 cwt. last year. An all-time record Canadian soy bean crop of 1,974,000 bushels is forecast for 1948. Canadian production of this crop is currently confined to Ontario. A revised estimate places the 1947 outturn of this crop at 1,110,000 bushels.

CANADIAN CONSTRUCTION INDUSTRY: The value of work performed by the Canadian construction industry moved up sharply in 1947, aggregating \$803,646,000 compared with \$523,187,000 in the previous year, according to preliminary figures released by the Bureau of Statistics. Final value of the work performed in 1946 was placed at \$775,452,000; final total for 1947 will thus be somewhat higher than that presently indicated. New construction work was valued at \$675,596,000 compared with \$367,705,000, and additions, alterations and repairs, \$128,050,000 compared with \$155,482,000. Completed reports were received by the Bureau from 19,688 concerns or contractors, an increase of 1,378 over the preceding year.

CANADA AND THE UNITED STATES

EUROPEAN RECOVERY: In an address on the occasion of the celebration of Canada Day at the 99th Annual Michigan State Fair at Detroit, Mich., September 12, the Minister of Health and Welfare, Mr. Martin, spoke in part as follows:

It is customary for speakers who are discussing the close relations between our two countries to say that they should serve as an example to the rest of the world. So they should. I do not think, however, that you and I are going to suppose that our example alone will have very much effect upon the countries that could most profit by it. Certainly we have been getting along famously with each other, for everyone to see, for a good many decades now. Yet, a glance at the world situation indicates that our example hasn't been very widely followed.

Are the relations between Canada and the United States, then, of very much practical importance to the world at large? I think that they are, and am going to mention one or two ways in which the interplay of our relations with other countries is affected by our relations with each other, to our mutual advantage and to that of those countries which share our ideals of world peace and co-operation.

The first instance that comes to my mind in this connection is that of European recovery. Everyone knows of the role your country is playing in this magnificent endeavour. It is also a matter of great importance to us in Canada. Of course, to neither of us is this interest in European recovery dictated solely by altruism -- and I say that without wishing to detract in any way from the fact that your Economic Co-operation Act is one of the most unselfish gestures that history can record. But we are trading countries and, quite apart from the human misery involved, Europe became as a result of the war, a dangerous unstable vacuum in the normal pattern of world trade. While, before the war, Western Europe, including the United Kingdom, was easily the most important trading area in the world, by the middle of 1947, Europe's share of world trade was only two-thirds of what it had been.

I can demonstrate the importance of this to my country by pointing out that Canada now ranks third among all the trading nations of the world. We entered the war in fifth place in the world trade hierarchy and now rank only behind the United States and the United Kingdom. And our population, remember, is less than a tenth of yours. On a per capita basis, our foreign trade exceeds that of any of the other leading trading nations of the world, including your own, and roughly one third of our national income is derived from foreign trade. It is obvious, therefore, that any major disruption of world trade patterns is of at least as great concern to us as it is to you.

Everyone knows, as I said, what the United States is doing about European recovery. But what has Canada done, and how do the relations between Canada and the United States enter the picture?

Since the end of the war, Canada has helped Europe -- by credits and by outright grants -- to the tune of nearly two billion dollars. You are used to astronomical figures in connection with your own European recovery effort, and that may not sound like very much. On the basis of our respective national incomes, however, two billions is to us what more than thirty-five billions would be to you. We feel that we have been keeping up our end.

CANADA AND E. R. P.

And now the second part of the question. How are relations between Canada and the United States involved in European recovery? To answer that, I must touch briefly on the normal pattern of Canadian trade. In a normal year before the war, Canada had a favourable balance of trade -- that is to say, we sold more to other countries than we bought from other countries. But at the same time we regularly had an adverse balance with the United States. That was not a serious matter because our favourable balance with other countries -- mostly the United Kingdom and Western Europe -- more than made up for our adverse balance with you.

We have seen the effect of the war on Europe's trade. And I have mentioned the help Canada has extended to Europe by gifts and loans. But trade that is based on gifts and loans does not provide us with the hard cash we need to keep our accounts balanced with the United States. And our adverse balance with you has continued. In round figures, we bought two billion dollars' worth of goods from you last year, and you only bought one billion dollars' worth of goods from us. It is easy to see that that kind of process could not continue for very long, and, as a matter of fact, we had to draw heavily on our reserves of United States dollars last year and consequently have had to protect our exchange position by drastically restricting imports from dollar countries.

Now to come back to the European Recovery Program. Living as close to us as you do, you may have heard Canadians speculating on the volume of dollars made available by the Economic Co-operative Administration which may be spent in Canada to purchase goods for Europe. It is a question in which we are keenly interested. But it would be a great mistake to assume that, because E.C.A. dollars are being spent in Canada, we will be profiteering out of your aid to Europe. As a matter of fact, it would be unwise to expect that E.C.A. purchases will do more than enable us to maintain the volume of our shipments to Europe -- without at the same time going bankrupt in our