THE
# Livestock and Wool SITUATION

BUREAU OF AGRICULTURAL ECONOMICS
UNITED STATES DEPARTMENT OF AGRICULTURE

LWS-46 MAY - JUNE 1946

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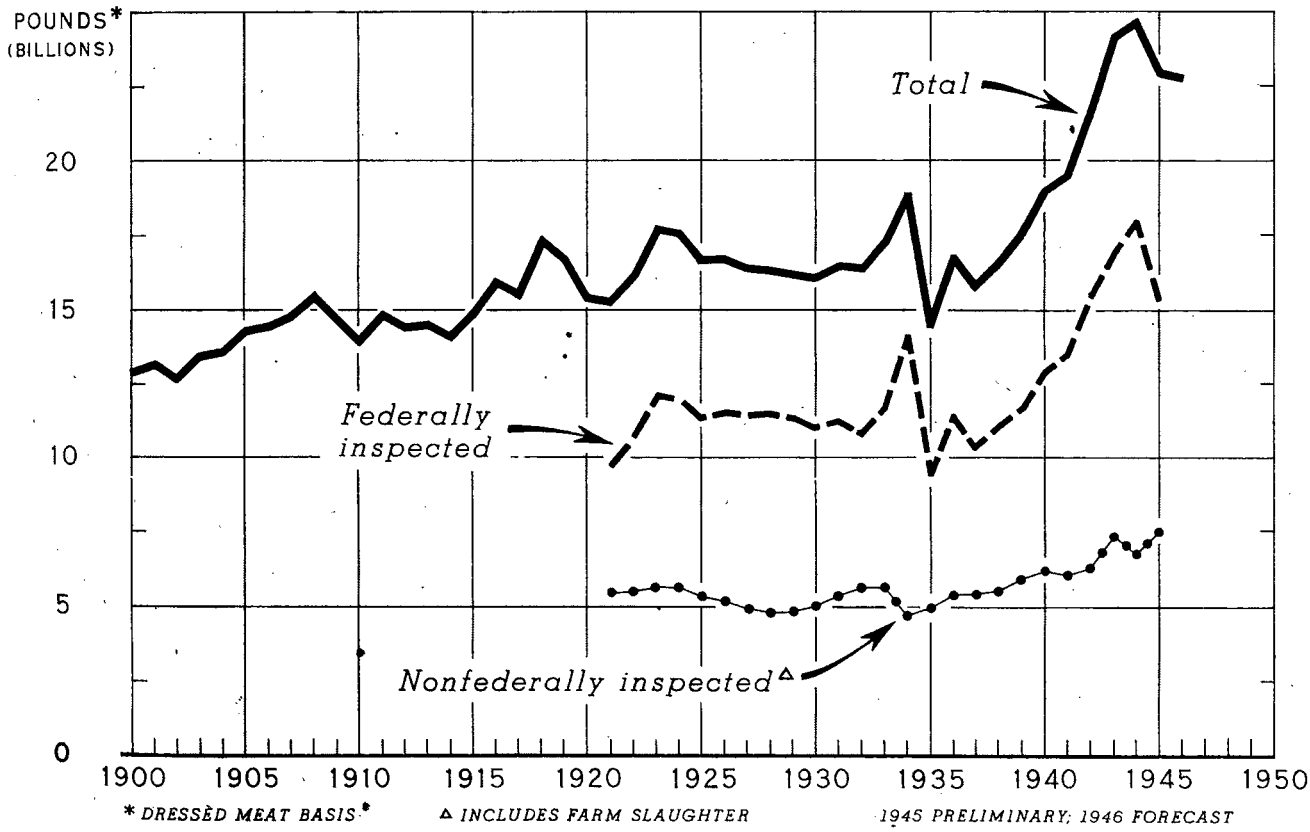
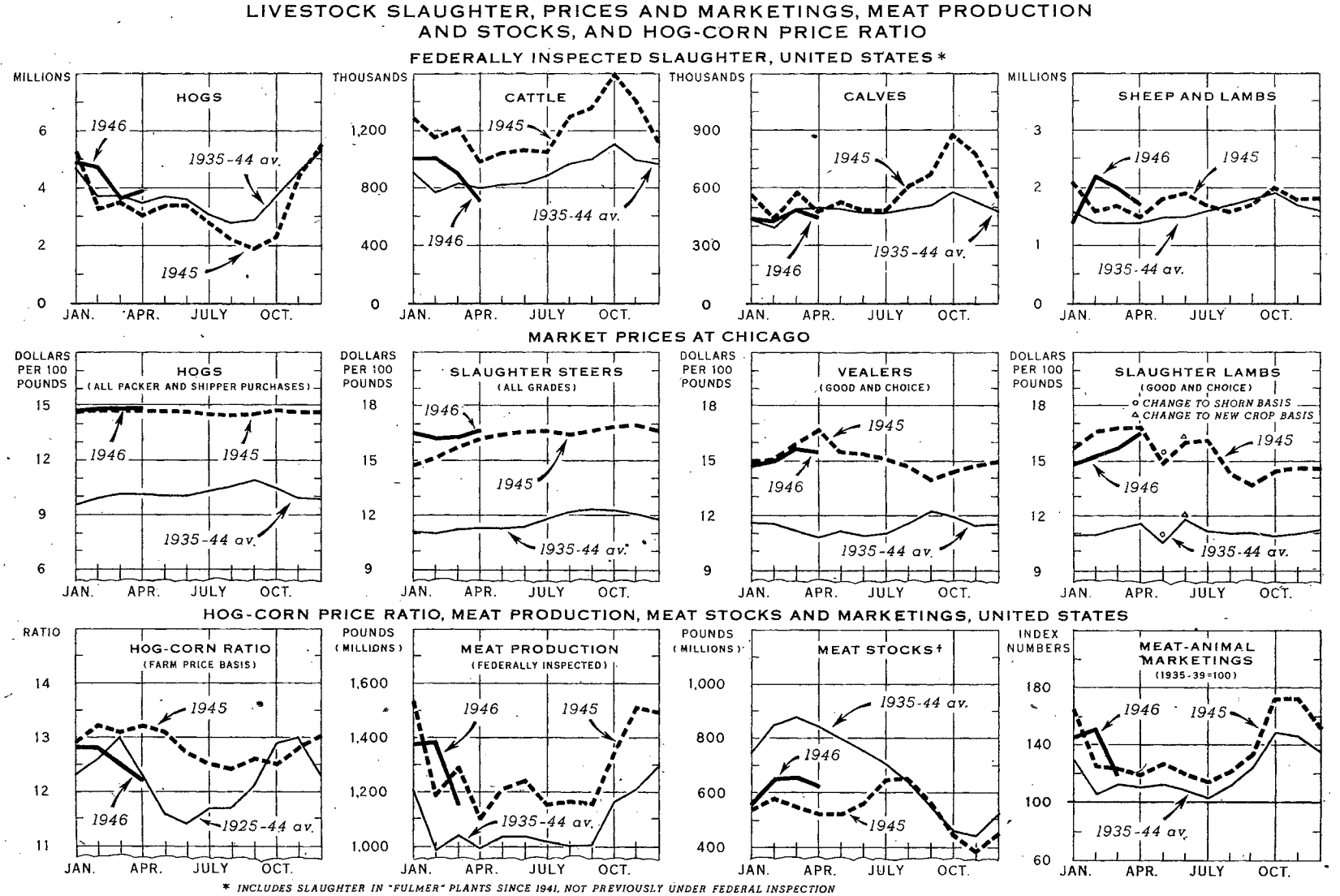
## TOTAL MEAT PRODUCTION, PRODUCTION UNDER FEDERAL INSPECTION, AND NONINSPECTED PRODUCTION, UNITED STATES, 1900-1946




U.S. DEPARTMENT OF AGRICULTURE NEG. 45943 BUREAU OF AGRICULTURAL ECONOMICS

Meat production, after reaching a peak of over 24 billion pounds in 1943 and 1944, is now trending downward. Output in 1945 was estimated to be 22.9 billion pounds, dressed meat basis. Meat production in 1946 probably will be moderately less than in 1945, with decreases occurring in beef and veal and lamb and mutton. Pork production is likely to be moderately greater than in 1945, partly as a result of a 12-percent increase in the fall pig crop last year.




* INCLUDES SLAUGHTER IN "FULMER" PLANTS SINCE 1941, NOT PREVIOUSLY UNDER FEDERAL INSPECTION

† BEEF, LAMB, MUTTON, PORK, AND MISCELLANEOUS MEATS IN MEAT PACKING PLANTS AND COMMERCIAL COLD STORAGE HOUSES, BEGINNING OF MONTH

U. S. DEPARTMENT OF AGRICULTURE

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FIGURE 1

# THE LIVESTOCK AND WOOL SITUATION

Approved by the Outlook and Situation Board May 24, 1946

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## SUMMARY

A production of meat nearly as large as the 22.9 billion pounds produced in 1945 (wholesale weight) is now forecast for 1946. This would be about two billion pounds less than the record output of 24.7 billion achieved in 1944. Pork production is likely to be larger this year than last, while output of beef, veal, and lamb probably will be less.

Smaller pork production in 1947 and a downward trend in beef and lamb production may result in a total output of meat in 1947 at least a billion pounds less than in 1946.

Higher prices and smaller supplies of feed grains and other concentrates compared with a year earlier are likely to result in relatively large marketings late this year of 1946 spring pigs, and also in a much smaller pig crop in the fall of 1946 than in the fall of 1945. Through December, hog slaughter will continue large compared with last year. However, beginning early in 1947, hog slaughter will be less than that of corresponding months of 1946 because of the anticipated small proportion of the spring pig crop remaining for market after December. The reduction in hog slaughter probably will become most pronounced in the spring and summer next year, when 1946 fall pigs reach market weights.

The number of hogs slaughtered in 1946 probably will be around 10 percent greater than the 68.5 million slaughtered in 1945, the result of delayed marketings of 1945 spring pigs, a 12 percent increase in the 1945 fall pig crop, now being marketed, and early marketings of 1946 spring pigs. Weights of hogs slaughtered this year, however, will average less than the record weights in 1945.

Total cattle and calf slaughter in 1946 probably will be 5 to 7 percent under the record slaughter of 34.9 million head in 1945. With total cattle numbers only slightly below a year earlier, marketings of grass-cattle may be nearly as large as 1945. But marketings of grain-fed cattle which normally account for about a third of the beef supply (excluding veal) will be materially less than the large marketings of 1945. The number of cattle on feed in the Corn Belt April 1 was 17 percent below a year earlier. Feeding operations will be curtailed more than usual this summer and next fall as a result of the withdrawal of the 50-cent producer's subsidy June 30, the recently increased prices of feed concentrates, and current high prices for feeder stock.

Production of lamb and mutton will fall below 1945 levels during the second half-year, reflecting the 10 percent reduction in the number of breeding ewes on farms and ranches January 1, and the substantial drop in this year's lamb crop.

Civilian consumption of meat from October through March was 85 pounds per person compared with 83 pounds in the same period of 1943-44 and was the largest for the six-month period in over 35 years. The rate of consumption has declined moderately since winter. At current meat prices, supplies will continue less than demand at least through the first half of 1947.

United States exports of meat this year will exceed the 1.2 billion pounds (dressed meat basis) exported in 1945, but will be considerably below the 2.5 billion pounds exported in 1943 and the 1.9 billion pounds exported

in 1944. After European feed supplies are restored to a more nearly normal level, the United Kingdom will be the principal export outlet. At present continental Europe is importing substantial quantities of meat from the United States; although that area was a net exporter of meat in prewar years.

Commodity Credit Corporation will continue to purchase wool from domestic growers until November 1 under the current purchase program. Resales to mills are being made at prices generally competitive to those for imported wools. Prices of foreign wool are determined largely by the British program for selling Australian, New Zealand, and South African wools. In the new season which begins in July, the British Joint Organization will regulate offerings when auctions are resumed. It will also be prepared to buy British Dominion wool at a "stabilization price", if the wool is not sold to commercial interests at this price or higher. Such action will tend to support prices in foreign markets.

United States mill consumption of apparel wool in 1946 now seems likely to be close to the wartime annual average of a billion pounds, grease basis, and will be much larger than in any previous peacetime year. Weekly average consumption in March of about 21 million pounds, grease basis, was equivalent to an annual rate of about 1,100 million pounds. Present demand for wool clothing and demand for fabrics and clothing for commercial inventory replenishment undoubtedly would support a current rate of mill consumption even higher than at present.

United States stocks of apparel wool have increased considerably during the past year. Stocks reported by mills and dealers and stocks held by the United States Government totaled about 835 million pounds, grease basis, on April 1 compared with 679 million pounds a year earlier. Government stocks of domestic wool on April 1, totaling approximately 460 million pounds, grease basis, were 168 million pounds larger than a year earlier. The 1946 clip is now arriving in volume for appraisal and purchase, and CCC stocks will increase rapidly unless sales to mills are greatly increased. March sales at an annual rate were equivalent to little more than half of expected 1946 domestic production.

OUTLOOK

## 1946 Meat Output Close to 1945; Production to Decline in 1947

On the basis of slaughter in the first 5 months of 1946 and current prospects for the balance of the year, meat production in 1946 is likely to be nearly equal to the 1945 total, estimated at 22.9 billion pounds, dressed meat basis. Pork production probably will be moderately greater than a year earlier, when output was slightly over 10 billion pounds. The number of hogs slaughtered in 1946 may be as much as 10 percent greater than in 1945, but yields of pork per hog will be down from last year because of lighter weights resulting from higher feed-grain prices and scarcer supplies of corn. Beef and veal production in 1946 is likely to be within 5 to 7 percent of the record output of 1945 when approximately 11.8 billion pounds were produced, almost 50 percent more than the average for 1935-39. Lamb and mutton production in 1946 will be somewhat less than the 1,053 million pounds produced in 1945.

Total meat production in the first 5 months of 1946 apparently was about the same as a year earlier, with increased output of pork largely off-setting reduced beef and veal production. Meat production in nonfederally inspected plants assumed record proportions in early 1946.

The tight feed-concentrate supply and increases in ceiling prices of feed grains have sharply changed the livestock picture from what seemed probable a few months ago. The hog-corn price ratio declined sharply in May. This came at a time when hog breeding for fall farrowing was in full-swing. As a result, the number of fall pigs saved this year will be materially less than the 35 million pigs saved in the fall of 1945. If hog and corn prices continue at present ceilings during the summer and early fall, the hog-corn price ratio will be about 20 percent below the 1925-44 average for that period. Such an unfavorable ratio would cause a sharp reduction in hog output, especially if returns to dairy producers are increased during the second half of 1946, as now seems likely. Because of the relatively high corn prices, the proportion of the 1946 spring pig crop marketed in October-December this year, is likely to be larger than usual, and considerably larger than last year. Thus even if the spring pig crop of 1946 is as large as that of 1945, the number of hogs marketed in January-March 1947 will be less than in the first quarter of 1946. The reduced pig crop this fall will be reflected primarily in smaller marketings of hogs in the spring and summer of 1947 than in the spring and summer this year.

Relatively few cattle are put on grain feed during the spring and summer and very little grain is used for feeding lambs during those seasons.

Cattle and calf slaughter will total somewhat less in 1946 than in 1945, and a further moderate reduction is probable in 1947. Sheep and lamb slaughter has continued large during the past four years and numbers of sheep on farms have dropped sharply. A halt in the downswing in sheep numbers would necessitate a sharp reduction in slaughter. Such a reduction may occur in 1947 if the farm labor supply increases sufficiently and if sheep and lamb prices rise.

Table 1.- Estimated livestock slaughter and meat and lard production, average 1935-39, annual 1940-45 and indicated 1946

| | Average 1935-39 | | | 1940 | | | 1941 | | | 1942 | | | 1943 | | | 1944 | | | 1945 1/ | | | Indicated 1946 | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Head | Total live-weight | Total pro-duction | Head | Total live-weight | Total pro-duction | Head | Total live-weight | Total pro-duction | Head | Total live-weight | Total pro-duction | Head | Total live-weight | Total pro-duction | Head | Total live-weight | Total pro-duction | Head | Total live-weight | Total pro-duction | Head | Total live-weight | Total pro-duction |
| | Thous. | Mil. lb. | Mil. lb. | Thous. | Mil. lb. | Mil. lb. | Thous. | Mil. lb. | Mil. lb. | Thous. | Mil. lb. | Mil. lb. | Thous. | Mil. lb. | Mil. lb. | Thous. | Mil. lb. | Mil. lb. | Thous. | Mil. lb. | Mil. lb. | Thous. | Mil. lb. | Mil. lb. |
| **Livestock slaughter and meat production** | | | | | | | | | | | | | | | | | | | | | | | | |
| **Cattle:** | | | | | | | | | | | | | | | | | | | | | | | | |
| Federally inspected | 2/10,024 | 3/9,195 | 4/4,847 | 9,756 | 9,175 | 4,971 | 10,946 | 10,517 | 5,739 | 12,347 | 11,773 | 6,347 | 11,727 | 11,197 | 5,970 | 13,960 | 12,905 | 6,655 | 14,538 | 13,775 | 7,240 | | | |
| Other wholesale and retail | 4,455 | 3,620 | 1,858 | 4,644 | 3,842 | 1,984 | 4,916 | 4,114 | 2,126 | 5,047 | 4,314 | 2,249 | 5,416 | 4,535 | 2,340 | 5,532 | 4,415 | 2,273 | 6,244 | 5,224 | 2,700 | | | |
| Farm | 591 | 452 | 231 | 571 | 445 | 227 | 571 | 445 | 227 | 587 | 460 | 235 | 572 | 417 | 213 | 570 | 406 | 207 | 590 | 426 | 217 | | | |
| Total | 15,070 | 13,267 | 6,936 | 14,971 | 13,462 | 7,182 | 16,433 | 15,076 | 8,092 | 17,981 | 16,547 | 8,831 | 17,715 | 16,149 | 8,523 | 20,062 | 17,726 | 9,135 | 21,372 | 19,425 | 10,157 | 20,000 | 18,400 | 9,600 |
| **Calves:** | | | | | | | | | | | | | | | | | | | | | | | | |
| Federally inspected | 2/ 5,765 | 3/1,098 | 4/ 615 | 5,359 | 1,024 | 568 | 5,461 | 1,070 | 599 | 5,760 | 1,197 | 667 | 5,209 | 1,080 | 597 | 7,770 | 1,693 | 926 | 7,020 | 1,501 | 823 | | | |
| Other wholesale and retail | 3,117 | 587 | 335 | 3,003 | 569 | 328 | 3,107 | 612 | 354 | 3,317 | 697 | 399 | 4,111 | 846 | 480 | 5,247 | 1,028 | 583 | 5,884 | 1,316 | 729 | | | |
| Farm | 804 | 152 | 88 | 728 | 142 | 82 | 684 | 132 | 76 | 625 | 127 | 73 | 594 | 144 | 83 | 602 | 152 | 87 | 584 | 146 | 83 | | | |
| Total | 9,686 | 1,837 | 1,038 | 9,090 | 1,735 | 978 | 9,252 | 1,814 | 1,029 | 9,702 | 2,021 | 1,139 | 9,914 | 2,070 | 1,160 | 13,619 | 2,873 | 1,596 | 13,488 | 2,963 | 1,635 | 13,000 | 2,700 | 1,500 |
| **Sheep and lambs:** | | | | | | | | | | | | | | | | | | | | | | | | |
| Federally inspected | 17,486 | 1,485 | 696 | 17,351 | 1,495 | 702 | 18,125 | 1,600 | 750 | 21,625 | 1,926 | 880 | 23,363 | 2,118 | 958 | 21,876 | 1,956 | 887 | 21,220 | 2,003 | 913 | | | |
| Other wholesale and retail | 3,699 | 312 | 148 | 3,651 | 315 | 150 | 3,605 | 316 | 150 | 3,383 | 299 | 140 | 3,134 | 267 | 122 | 2,918 | 248 | 114 | 2,850 | 257 | 117 | | | |
| Farm | 624 | 56 | 27 | 581 | 52 | 25 | 582 | 53 | 25 | 578 | 52 | 25 | 573 | 51 | 24 | 550 | 49 | 22 | 572 | 50 | 23 | | | |
| Total | 21,809 | 1,853 | 871 | 21,583 | 1,862 | 877 | 22,312 | 1,969 | 925 | 25,586 | 2,277 | 1,045 | 27,070 | 2,436 | 1,104 | 25,344 | 2,253 | 1,023 | 24,642 | 2,310 | 1,053 | 21,000 | 1,900 | 900 |
| **Hogs:** | | | | | | | | | | | | | | | | | | | | | | | | |
| Federally inspected | 34,262 | 7,874 | 4,584 | 50,398 | 11,716 | 6,614 | 46,520 | 11,214 | 6,345 | 53,897 | 13,229 | 7,562 | 63,431 | 16,141 | 9,308 | 69,017 | 16,859 | 9,456 | 40,960 | 10,837 | 6,387 | | | |
| Other wholesale and retail | 8,871 | 1,827 | 1,037 | 13,057 | 2,722 | 1,546 | 12,088 | 2,594 | 1,473 | 12,117 | 2,769 | 1,571 | 5/17,779 | 3,996 | 2,260 | 5/14,016 | 2,971 | 1,697 | 5/13,500 | 3,078 | 1,831 | | | |
| Farm | 13,656 | 3,114 | 1,716 | 14,155 | 3,262 | 1,798 | 12,789 | 2,957 | 1,629 | 12,463 | 2,886 | 1,590 | 14,063 | 3,233 | 1,781 | 13,826 | 3,200 | 1,763 | 14,051 | 3,318 | 1,828 | | | |
| Total | 56,789 | 12,815 | 7,337 | 77,610 | 17,700 | 9,958 | 71,397 | 16,765 | 9,447 | 78,477 | 18,884 | 10,723 | 95,273 | 23,370 | 13,349 | 96,859 | 23,030 | 12,916 | 68,511 | 17,233 | 10,046 | 76,000 | 18,500 | 10,600 |
| **All meat animals:** | | | | | | | | | | | | | | | | | | | | | | | | |
| Federally inspected | — | 19,652 | 10,742 | — | 23,410 | 12,855 | — | 24,401 | 13,433 | — | 28,125 | 15,456 | — | 30,536 | 16,833 | — | 33,413 | 17,924 | — | 28,116 | 15,363 | | | |
| Other wholesale and retail | — | 6,346 | 3,378 | — | 7,448 | 4,008 | — | 7,636 | 4,103 | — | 8,079 | 4,359 | — | 9,644 | 5,202 | — | 8,662 | 4,667 | — | 9,875 | 5,377 | | | |
| Farm | — | 3,774 | 2,062 | — | 3,901 | 2,132 | — | 3,587 | 1,957 | — | 3,525 | 1,923 | — | 3,845 | 2,101 | — | 3,807 | 2,079 | — | 3,940 | 2,151 | | | |
| Total | — | 29,772 | 16,182 | — | 34,759 | 18,995 | — | 35,624 | 19,493 | — | 39,729 | 21,738 | — | 44,025 | 24,136 | — | 45,882 | 24,670 | — | 41,931 | 22,891 | — | 41,500 | 22,600 |
| **Production lard and rendered pork fat** | | | | | | | | | | | | | | | | | | | | | | | | |
| Federally inspected | | | 944 | | | 1,527 | | | 1,526 | | | 1,724 | | | 2,080 | | | 2,367 | | | 1,311 | | | |
| Other wholesale and retail | | | 219 | | | 327 | | | 312 | | | 312 | | | 491 | | | 356 | | | 323 | | | |
| Farm | | | 467 | | | 489 | | | 443 | | | 433 | | | 485 | | | 480 | | | 498 | | | |
| Total | | | 1,630 | | | 2,343 | | | 2,281 | | | 2,469 | | | 3,056 | | | 3,203 | | | 2,132 | | | 2,300 |

1/ Preliminary.
2/ Includes 187,000 cattle and 39,000 calves in 1935, and 4,000 cattle in 1936 slaughtered for Government account.
3/ Includes an estimated 114 million pounds of cattle and 10 million pounds of calves slaughtered under the drought purchase programs in 1935 and early 1936.
4/ Includes an estimated 57 million pounds of beef and 5 million pounds of veal produced under the emergency Government relief purchase program in 1935.
5/ Includes some animals slaughtered on farms for nonfarmers and slaughtered by or for nonfarmers for their own use.

Total Cattle Slaughter Large Despite Reduction in Inspected Slaughter

Total cattle and calf slaughter in the first 4 months of 1946 continued at a high rate. Federally inspected slaughter was reported to be 18 percent less than a year earlier but a substantial diversion of cattle to non-federally-plants occurred during this period. Slaughter supplies of grain-fed cattle for the year as a whole will be less than in 1945, but the number of grass-fat cattle slaughtered in the late summer and fall may not be greatly different from the large slaughter of 1945.

Bluestem pastures in Kansas and Oklahoma are well stocked with cattle this year, and prospects for spring and summer grazing in those areas are good to excellent. Most of the cattle from these pastures are usually marketed prior to the peak movement of grass-cattle marketings, which normally occurs in October.

Grain Feeding of Cattle Lower This Year Than Last

The number of cattle on feed in the Corn Belt on April 1 was estimated to be 17 percent (around 350,000 head) less than a year earlier. This percentage reduction was the largest on record except for the years following the droughts of 1934 and 1936. The sharpest reduction in the number of cattle on feed April 1 this year occurred in the 6 Western Corn Belt States, where numbers were down about 20 percent. With the recent sharp advance in feed prices and the uncertainty as to price ceilings and subsidies, the number of cattle put on feed in the next 6 months may be sharply reduced. The discontinuance on June 30, 1946 of the 50-cent per 100 pound subsidy on sales of higher-grade cattle will be another factor tending to discourage feeding.

Unless feed-grain production is unusually large this year or unless there is a sharp drop in feeder cattle prices, the movement of cattle to feedlots in the fall will be restricted and many feeder-type cattle that normally would be grain fed will go straight to slaughter. A relatively narrow spread between prices of feeder and fat cattle has existed since last fall. Feeder-cattle prices have continued at record levels, while prices of fed cattle have been held at levels only slightly above 1945.

Hog Slaughter Up From Year Age: Lamb Slaughter to be Below 1945

Hog slaughter under Federal inspection in January-April totaled 17.1 million head, 13 percent greater than a year earlier but otherwise the lowest since 1941. Marketings hit a seasonal low in late March but increased somewhat in April and early May as marketings of fall pigs got underway in volume. Hog slaughter during the remainder of 1946 probably will continue larger than a year earlier. The 1945 fall pig crop was 1[illegible] percent greater than a year earlier. Hogs from the 1946 spring crop are likely to be marketed earlier than those from the 1945 spring crop, reflecting smaller supplies and higher prices of corn during the summer and early fall than a year ago. Total slaughter of hogs for the year may be around 10 percent greater than the 68.5 million head slaughtered in 1945.

Lamb and mutton production through early April was greater than a year earlier as a result of a large movement of grain-fed lambs and sheep, including breeding stock, and heavy market weights of lambs. Ewe slaughter, though somewhat reduced, continued to make up a larger-than-usual proportion of the total slaughter. March and April were generally rather favorable for the development of the early lamb crop, and the condition of early lambs on May 1 was above average for that date.

Lamb slaughter beginning in May fell below a year earlier. Slaughter is likely to continue below 1945 for the remainder of the year, chiefly reflecting the 13-percent reduction in the early spring crop and a probable reduction in the late crop of lambs. The total lamb crop will be materially less than the 28.2 million head of 1945. Total slaughter of sheep and lambs in 1946 may be the smallest since 1941.

## Civilian Meat Supplies Large; Demand to Exceed Supplies

During the last quarter of 1945 and the first quarter of 1946, meat production was at a high level, second only to the corresponding period of 1943-44. Nevertheless, supplies were insufficient to meet the strong demand at ceiling prices. Military purchases were sharply reduced during this period; as a result, disappearance of meat into civilian channels during the 6-month period was approximately 85 pounds per capita two pounds greater than the wartime high attained in the fall and winter of 1943-44. Storage holdings of meat increased less than seasonally in late 1945 and early 1946.

Table 2. - Total and per capita civilian consumption of meat, dressed meat basis, United States, 1935-39 average, 1940-45.

| Year | Total | | | | | Per capita | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | Beef | Veal | Lamb and mutton | Pork, excluding lard | All meats | Beef | Veal | Lamb and mutton | Pork excluding lard | All meats |
| | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Pounds | Pounds | Pounds | Pounds | Pounds |
| 1935-39 average | 7,111 | 1,038 | 868 | 7,286 | 16,303 | 54.8 | 8.0 | 6.7 | 56.1 | 125.6 |
| 1940... | 7,265 | 978 | 874 | 9,615 | 18,732 | 54.7 | 7.3 | 6.6 | 72.4 | 141.0 |
| 1941... | 8,024 | 1,003 | 906 | 8,830 | 18,763 | 60.5 | 7.6 | 6.8 | 66.5 | 141.4 |
| 1942... | 8,104 | 1,054 | 948 | 8,139 | 18,245 | 61.2 | 8.0 | 7.2 | 61.5 | 137.9 |
| 1943... | 6,434 | 1,028 | 824 | 9,380 | 17,666 | 49.6 | 7.9 | 6.4 | 72.4 | 136.3 |
| 1944... | 6,905 | 1,466 | 865 | 9,949 | 19,185 | 53.4 | 11.3 | 6.7 | 77.0 | 148.4 |
| 1945.1/ | 7,617 | 1,502 | 928 | 7,811 | 17,858 | 58.7 | 11.6 | 7.2 | 60.2 | 137.7 |

1/ Preliminary

Meat supplies will decline until late summer as production decreases seasonally. Although civilian supplies will be greater than a year ago, supplies will not be large enough in the remaining months of the year to fill all demands at current retail prices. Per capita civilian meat consumption for 1946 may be 145 to 150 pounds (dressed meat basis), 7 to 10 pounds greater than in 1945 but 15 to 20 pounds less than potential demand at currently reported retail prices. Distribution for meat to civilians was controlled by rationing in 1945. Although supplies will be larger in 1946, they will not be so well distributed among users and by geographical areas.

Military purchases of meat (dressed carcass equivalent) are not likely to exceed 800 million pounds this year compared with net purchases of approximately 3.3 billion pounds in 1945. But exports and shipment from the United States may be somewhat larger than the 1.2 billion pounds exported in 1945.

Cash Income From Meat Animals in 1946 to be Near 1945; Sales Reduced But Prices Higher

Cash receipts from farm marketings of meat animals reached a record high in 1943 of 5,865 million dollars, almost 2-1/2 times as great as the 1937-41 average. Receipts declined to 5,702 million dollars in 1944 but increased to 5,826 million dollars in 1945.

Cash receipts to farmers from sales of meat animals in 1946 probably will be close to the estimated 5,826 million dollars of 1945. Because of smaller marketings of cattle and lambs farm sales may be reduced 3 to 5 percent from those of 1945. Meat-animal prices averaged higher than a year earlier through May. If price ceilings on meats and meat animals are continued at present levels in the second half of 1946, prices of meat animals for the year are likely to average higher than in 1945, or around 80 percent above the 1937-41 average.

Prices received by farmers for all meat animals as a group in April and May this year were slightly higher than a year earlier and were exceeded only in the spring and summer of 1919. Prices were well above parity for all species, except sheep. Hog prices were the highest since 1917-19. Cattle prices were the highest on record. Unit returns from sales of lambs, including producers' subsidies, exceeded those of 1917-19, the previous record.

Meat-Animal Production on Farms In 1945 the Fourth Largest on Record

Liveweight production of meat animals on farms, which reached a low of 23.2 billion pounds in 1937 following the mid-1930 droughts, increased greatly in the following 6 years. Production exceeded 40 billion pounds for the first time in 1942 and reached a record high of 46.3 billion pounds in 1943. Total production of meat animals declined in 1944 and 1945, mostly because of a decrease in hog production.

Meat-animal production on farms and ranches in 1945 totaled 40.2 billion pounds, liveweight -- the fourth largest on record. Production of cattle and calves at 19.0 billion pounds was slightly larger than a year earlier and was the greatest ever produced. Hog production, estimated at 19.2 billion pounds, was the smallest since 1941. Sheep and lamb production was the lowest since 1937.

Table 3.- Cash income, sales, and prices received by farmers for meat animals, 1937-41 average, 1942-45 annual, and forecast 1946

| Item | Unit | 1937-41 average | 1942 | 1943 | 1944 | 1945 | 1946 (forecast |
|---|---|---|---|---|---|---|---|
| Cash receipts from farm marketings: | | | | | | | |
| Cattle and calves .. | Mil.dol. | 1,358 | 2,293 | 2,581 | 2,604 | 3,219 | |
| Hogs ..... | " " | 949 | 2,192 | 2,942 | 2,813 | 2,288 | |
| Sheep and lambs .... | " " | 184 | 307 | 342 | 303 | 319 | |
| | | 2,491 | 4,792 | 5,865 | 5,720 | 5,826 | 5,800 |
| Sales of meat and meat animals: | | | | | | | |
| Cattle and calves (live weight basis) | Mil.lb. | 17,890 | 21,142 | 21,424 | 23,589 | 26,290 | |
| Hogs (live weight basis) ..... | " " | 12,642 | 16,697 | 21,358 | 21,411 | 16,175 | |
| Sheep and lambs, (live weight basis) | " " | 2,471 | 2,947 | 3,039 | 2,825 | 2,827 | |
| | | 33,003 | 40,786 | 45,821 | 47,825 | 45,292 | 43,500 |
| Average price received by farmers 2/: | | | | | | | |
| Beef cattle (100 lb) | Dol. | 7.41 | 10.62 | 11.90 | 10.80 | 12.10 | |
| Veal calves (100 lb) | " | 8.72 | 12.45 | 13.50 | 12.50 | 13.20 | |
| Hogs (100 lb.) ..... | " | 7.59 | 13.04 | 13.70 | 13.10 | 14.00 | |
| Sheep (100 lb.) .... | " | 4.20 | 5.78 | 6.57 | 6.01 | 6.35 | |
| Lambs (100 lb.) .... | " | 8.28 | 11.74 | 12.96 | 12.51 | 13.00 | |
| Index of prices received by farmers, all meat animals 3/.. | --- | 123 | 188 | 209 | 200 | 210 | 220 |

1/ Preliminary. 2/ Weighted average: 1937-41 is the simple average of the weighted annual average for each of the 5 years. 3/ August 1909-July 1914 = 100.

Table 4.- Meat-animal production on farms and ranches, liveweight, United States, averages 1924-28, 1929-33, and 1934-38, annual 1939-45

| Year | Cattle and calves | Hogs | Sheep and lambs | Total |
|---|---|---|---|---|
| | Mil. lbs. | Mil. lbs. | Mil. lbs. | Mil. lbs. |
| 1924-28 average | 12,672 | 15,399 | 1,603 | 29,674 |
| 1929-33 average | 13,796 | 16,047 | 1,906 | 31,749 |
| 1934-38 average | 14,077 | 12,583 | 1,917 | 28,577 |
| 1939 | 15,097 | 17,082 | 2,041 | 34,220 |
| 1940 | 15,583 | 17,043 | 2,087 | 34,713 |
| 1941 | 16,718 | 17,473 | 2,267 | 36,458 |
| 1942 | 17,967 | 21,054 | 2,332 | 41,353 |
| 1943 | 18,707 | 25,470 | 2,134 | 46,311 |
| 1944 | 19,012 | 20,757 | 1,980 | 41,749 |
| 1945 1/ | 19,028 | 19,190 | 1,959 | 40,174 |

1/ Preliminary.

## GOVERNMENT ACTIONS

### Livestock Slaughter Control Program in Operation

Following the establishment of quotas on cattle and calf slaughter by custom slaughterers April 1 (OPA RMPR 169, Amendment 69), the Department of Agriculture and Office of Price Administration on April 15 announced a plan to limit cattle, calf, and hog slaughter by commercial slaughterers. The object of the program is to prevent undue diversion of meat animals from regular slaughter establishments. The program became effective April 28 (except for noninspected slaughterers whose quota periods began May 1). Controls for federally inspected plants are contained in WFO 75-7, administered by the Department of Agriculture. Slaughter controls for non-inspected slaughterers are contained in a new order, OPA Control Order No. 2.

The new slaughter control program, similar to OPA's Control Order No. 1, which was in effect from April 30 to September 8, 1945, sets quotas for cattle and calf slaughter for individual slaughterers at 100 percent of their kill in the comparable month or accounting period of 1944. Quotas for hog slaughter were originally set at 80 percent of a slaughterer's monthly kill in 1944. However, reflecting the substantial increase in hog marketings an increase in the hog slaughter quotas to 90 percent beginning with the May accounting period was announced May 13. The new order (WFO 75-7) limits total slaughter in federally inspected plants for the first time. No quotas are set for "Certified" federally inspected slaughterers, as such controls are specifically prohibited by the Patman Amendment to the Price Control Act. No restrictions are placed upon delivery of meat, as in Control Order No. 1. Slaughter by farmers is not restricted.

To implement the slaughter-control program, Reconstruction Finance Corporation will withhold subsidy payments from slaughterers in violation of quotas.

### Pork and Lard Set-asides Increased

Beginning May 5, federally-inspected and "Certified" slaughterers were required to set aside for Government purchase a quantity of pork equal to 15 percent of liveweight hog slaughter. The previous or set-aside was 13 percent. The lard set aside also was increased, from 5 percent to 6 percent of liveweight slaughter. The lard set-aside provisions were amended so that rendered pork fat as well as lard may be delivered to the Government. Slaughterers in the 4 states, Kentucky Tennessee, Virginia and West Virginia, formerly exempt from the pork and lard set-asides, were required to set aside pork products for government purchase beginning May 12. Seven southern States are now exempt from the pork and lard reservation order.

### Feed-Price, Livestock-Production Policy Announced; Fall Pig-Crop Goal Set

Sharp increases in feed-grain and protein-feed prices effective May 13, a price policy for feed, and a livestock-production policy were announced by the Office of Economic Stabilization, the Department of Agriculture and the Office of Price Administration May 8.

Authorized increases in price ceilings on feed grains per bushel were: Corn, 25 cents; wheat, 15 cents; oats, 5 cents; barley, 9 cents; and rye, 10 cents. The increase in grain-sorghum prices was 18 cents per hundredweight. The grain-price schedule is intended to cover possible further increase in parity; it was stated that the new price schedule can be expected to continue without change at least until June 30, 1947.

The following increases in price ceilings for protein feeds, per ton were made: Cottonseed, soybean, linseed and peanut meals, $14.00; fish meal, $10.00; fish scrap, $7.50; tankage, $7.50; meat scrap, $10.00; corn germ meal, $10.00; gluten feed and meal, $14.00 and minor meals and byproduct feeds $10.00.

The policy of the Government as announced in the May 8 release is to discourage heavy grain feeding of cattle and to encourage marketing of hogs at lighter market weights, the production of fewer hogs, and less poultry and eggs. Object is to conserve grain for direct human consumption. A 1946 fall pig-crop goal of 31.5 million head was announced by the Department of Agriculture May 12. The goal, 10 percent less than the fall pig crop of 1945, reflects the newly-announced policy to conserve grain.

No price ceiling increases are planned for pork, top grades of beef, eggs, or poultry during the year ahead, except as may be required by changes in parity as provided by law. Because of the desirability of maintaining milk production at a high level, increases in feed costs will be considered in any further adjustment that may be provided in returns to dairy farmers.

The 30-cent bonus corn purchase program of the Department of Agriculture was terminated May 11. About two-thirds of the quantity called for in the original goal was purchased and all the corn scheduled for export was obtained before the program was terminated.

## UNITED STATES EXPORTS AND IMPORTS OF MEAT AND MEAT ANIMALS

### Meat Exports to be Large in 1946

United States exports of meat this year probably will exceed the 1.2 billion pounds, dressed meat basis, exported in 1945, but are likely to fall below those of 1942-44. Exports of meat, including shipments to United States territories, declined steadily after World War I, reaching the very low average of 197 million pounds a year in 1935-39. Exports rose sharply with the beginning of the lend-lease program in 1941, and reached a record high of 2.5 billion pounds in 1943 (Table 5).

Exports of meat to the U. K. and U. S. S. R. continued relatively large in early 1946. (Table 6.) Exports to other countries, in the first quarter of 1946 were greater than in any war year. The destinations of meat shipped from the United States this year will be much different from those of 1945, when the United Kingdom received approximately 40 percent of total exports and shipments, Russia 30 percent, and other countries the remaining 30 percent. Under present plans for 1946, U. K. will receive approximately 20 percent of the total, Russia will receive a much smaller quantity than in 1945, and countries receiving meat distributed through UNRRA will receive almost 40 percent of the total. Other major recipients of meat will be France, Belgium, and the Netherlands East Indies. Small quantities will be exported to Latin American Republics.

## Imports Low in 1945-46

United States imports of meat, which averaged 262 million pounds a year in 1935-39 (dressed meat basis), reached a peak of 315 million pounds in 1941. Imports totaled 228 million pounds and 246 million pounds, respectively, in 1942 and 1943, but dropped to practically nothing in 1944 and 1945. Meat exports from the principal exporting countries of the world are under Combined Food Board allocation, and the United States will receive only a very small quantity of imported meat in 1946.

## Imports and Exports of Meat Animals Small

Exports of cattle, sheep, and hogs from the United States in immediate prewar years were small, and although exports have increased during the past 5 years, they are still small relative to livestock numbers or slaughter. Exports of slaughter, feeder and stocker cattle, sheep and hogs go principally to Mexico, Canada, and Central American Republics. Purebred or improved breeding stock are shipped from the United States to other countries in relatively small numbers. A relatively small number of cattle have been shipped to Europe by UNRRA since the end of the war. A strong demand for meat in Mexico and high livestock prices in that country contributed to the export of 19,564 cattle, 4,881 sheep, and 23,324 hogs from the United States in 1945. Comparable averages for 1937-39 were 3,562 cattle, 1,590 sheep, and 513 hogs.

Imports of cattle into the United States in the first 3 months of 1946 were reported to be 180,136 head. Imports have averaged below prewar during the war years, as Mexico has set export quotas and Canada has embargoed shipments of slaughter cattle. Imports of cattle by the United States in 1945 totaled 511,619 of which 435,435 were from Mexico. Average imports into the United States in 1937-39 were 569,767 head, including 321,512 head from Mexico.

A record member of sheep and lambs entered the United States from Canada in late 1944 and early 1945 after the lifting of an embargo on the shipment of slaughter stock from that country. The Canadian Government reinstituted the embargo July 6, 1945.

Table 5 .- Exports and imports of meats, dressed meat basis, 1899-1945

| Year | Exports 1/ | | | | Imports | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | Beef and veal | Pork excluding lard | Lamb and mutton | All meats | Beef | Veal | Pork excluding lard | Lamb and mutton | All meats |
| | Million pounds | Million pounds | Million pounds | Million pounds | Million pounds | Million pounds | Million pounds | Million pounds | Million pounds |
| 1899 .... | 493.2 | 939.8 | 0.7 | 1,433.7 | 0.4 | 0.2 | 0.5 | 0.1 | 1.2 |
| 1900 .... | 525.2 | 854.1 | .8 | 1,380.1 | .7 | .2 | .5 | .1 | 1.5 |
| 1901 .... | 548.9 | 865.0 | .3 | 1.414.2 | .8 | .1 | .6 | .1 | 1.6 |
| 1902 .... | 501.6 | 649.3 | 3.8 | 1,154.7 | .6 | .1 | .8 | .1 | 1.6 |
| 1903 .... | 530.0 | 569.4 | 3.2 | 1,102.6 | .6 | .1 | .9 | .2 | 1.8 |
| 1904 .... | 457.4 | 585.1 | 1.3 | 1,043.8 | .6 | .1 | 1.0 | .2 | 1.9 |
| 1905 .... | 531.8 | 685.3 | 1.3 | 1,218.4 | .7 | .1 | 1.0 | .2 | 2.0 |
| 1906 .... | 451.3 | 728.7 | 1.3 | 1,181.3 | .7 | --- | 1.0 | .2 | 1.9 |
| 1907 .... | 404.0 | 617.7 | 1.7 | 1,023.4 | .6 | .1 | .9 | .3 | 1.9 |
| 1908 .... | 269.8 | 637.8 | 2.1 | 909.7 | .6 | --- | .8 | .3 | 1.7 |
| 1909 .... | 203.2 | 493.1 | 2.2 | 698.5 | .9 | --- | .9 | .5 | 2.3 |
| 1910 .... | 140.0 | 331.7 | 2.5 | 474.2 | 1.2 | --- | 1.2 | .5 | 2.9 |
| 1911 .... | 123.9 | 480.6 | 3.0 | 607.5 | 1.3 | --- | 1.4 | .2 | 2.9 |
| 1912 .... | 84.5 | 466.6 | 5.8 | 556.9 | 3.2 | --- | 1.4 | .2 | 4.8 |
| 1913 .... | 66.8 | 479.3 | 5.5 | 551.6 | 41.9 | .6 | 1.4 | .7 | 44.6 |
| 1914..... | 150.4 | 398.9 | 4.6 | 553.9 | 276.6 | 3.2 | 28.3 | 20.1 | 328.2 |
| 1915 .... | 518.0 | 931.6 | 5.0 | 1,454.6 | 111.4 | 1.0 | 5.8 | 12.0 | 130.2 |
| 1916 .... | 385.4 | 1,033.3 | 6.1 | 1,424.8 | 21.0 | .9 | 1.2 | 15.8 | 38.9 |
| 1917 .... | 488.4 | 959.9 | 3.6 | 1,451.9 | 51.4 | .9 | 2.9 | 5.7 | 60.9 |
| 1918 .... | 954.3 | 1,809.7 | 2.3 | 2,766.3 | 375.4 | .9 | 3.8 | .6 | 380.7 |
| 1919 .... | 405.7 | 1,895.9 | 3.5 | 2,305.1 | 75.8 | 4.9 | 5.8 | 8.3 | 94.8 |
| 1920 .... | 219.8 | 949.3 | 4.0 | 1,173.1 | 51.0 | 9.8 | 2.5 | 102.2 | 165.5 |
| 1921 .... | 85.1 | 788.2 | 2/ 64.6 | 927.9 | 29.6 | 4.0 | 1.1 | 25.7 | 60.4 |
| 1922 .... | 87.9 | 753.6 | 2.1 | 843.6 | 33.7 | 5.6 | 1.2 | 12.1 | 52.6 |
| 1923 .... | 90.1 | 1,036.7 | 2.7 | 1,129.5 | 29.9 | 2.8 | 1.6 | 5.6 | 39.9 |
| 1924 .... | 86.1 | 767.3 | 2.0 | 855.4 | 31.6 | 4.6 | 7.1 | 2.2 | 45.5 |
| 1925 .... | 80.4 | 578.3 | 2.0 | 660.7 | 33.0 | 3.7 | 9.3 | 2.7 | 48.7 |
| 1926 .... | 70.6 | 449.6 | 1.7 | 521.9 | 72.2 | 3.9 | 12.6 | 3.2 | 91.9 |
| 1927 .... | 69.1 | 344.1 | 1.5 | 414.7 | 133.8 | 7.6 | 22.5 | 2.8 | 166.7 |
| 1928 .... | 59.0 | 363.3 | 1.5 | 423.8 | 181.9 | 8.0 | 13.4 | 3.4 | 206.7 |
| 1929 .... | 63.5 | 407.5 | 1.4 | 472.4 | 245.5 | 5.2 | 8.9 | 4.0 | 263.6 |
| 1930 .... | 59.0 | 339.3 | 2.1 | 400.4 | 134.3 | 1.9 | 2.6 | .7 | 139.5 |
| 1931 .... | 58.1 | 224.4 | 1.6 | 284.1 | 52.1 | .3 | 4.1 | .2 | 56.7 |
| 1932 .... | 32.3 | 175.4 | 1.4 | 209.1 | 63.2 | .1 | 6.1 | .1 | 69.5 |
| 1933 .... | 39.2 | 201.8 | 1.6 | 242.6 | 104.3 | .1 | 3.1 | --- | 107.5 |
| 1934 .... | 55.9 | 210.8 | 1.9 | 268.6 | 117.8 | --- | 1.7 | --- | 119.5 |
| 1935 .... | 52.5 | 136.2 | 2.3 | 191.0 | 200.7 | .2 | 11.1 | --- | 212.0 |
| 1936 .... | 54.3 | 118.3 | 1.9 | 174.5 | 225.6 | .1 | 44.9 | --- | 270.6 |
| 1937 .... | 50.6 | 114.4 | 2.0 | 167.0 | 226.6 | .2 | 80.2 | .1 | 307.1 |
| 1938 .... | 52.6 | 152.5 | 2.2 | 207.3 | 199.6 | .1 | 57.2 | --- | 256.9 |
| 1939 .... | 52.4 | 191.8 | 2.1 | 246.3 | 219.1 | .2 | 44.9 | .1 | 264.3 |
| 1940 .... | 55.5 | 162.8 | 2.5 | 220.8 | 167.4 | .1 | 5.9 | .2 | 173.6 |
| 1941 .... | 105.3 | 568.7 | 2.9 | 676.9 | 302.3 | .2 | 12.4 | .1 | 315.0 |
| 1942 .... | 40.0 | 1,610.3 | 27.5 | 1,677.8 | 226.0 | .2 | 1.3 | .5 | 228.0 |
| 1943 .... | 197.5 | 2,201.4 | 132.0 | 2,530.9 | 237.8 | .2 | 7.5 | .8 | 246.3 |
| 1944 .... | 136.2 | 1,690.2 | 73.0 | 1,899.4 | 5.5 | --- | .3 | --- | 5.8 |
| 1945 3/ .. | 259.8 | 903.9 | 28.9 | 1,192.6 | --- | --- | 2.2 | --- | 2.2 |

1/ Including shipments to United States territories.
2/ Mostly reexports.
3/ Preliminary.
Source: 1899-1939, U.S.D.A. Technical Bulletin No. 764, Trends in Production and Foreign Trade for Meats, 1941, page 58, converted to a dressed meat basis from Department of Commerce data; 1940-45 from records and reports of the Department of Agriculture and the Department of Commerce.

Table 6.- Exports of meats from the United States to United Kingdom, USSR, and other countries, excluding shipments to territories - 1937-39 average, 1940-46

| Item | Average 1937-39 | 1940 | 1941 | 1942 | 1943 | 1944 | 1945 | Jan.-March 1946 |
|---|---|---|---|---|---|---|---|---|
| | Thous.lb. | Thous.lb. | Thous.lb. | Thous.lb. | Thous.lb. | Thous.lb. | Thous.lb. | Thous.lb. |
| | | | | United Kingdom | | | | |
| Beef and Veal | | | | | | | | |
| Fresh and frozen, pickled and cured | 237 | 80 | 258 | 867 | 25,113 | 17,214 | 33,207 | 57,866 |
| Corned beef, beef hash, roast beef and canned beef | 1,546 | 297 | 7,786 | 5,002 | 112 | 797 | 1/ | 4 |
| Pork | | | | | | | | |
| Fresh and frozen | 5,328 | 7,044 | 190 | 71,105 | 315,805 | 549,464 | 227,921 | 13,963 |
| Hams and shoulders, cured | 42,868 | 7,719 | 50,144 | 61,925 | 129,297 | 76,920 | 52,745 | 3,284 |
| Bacon | 1,975 | 2,618 | 63,508 | 57,084 | 21,373 | 116,551 | 10,106 | 64 |
| Cumberland and Wiltshire sides | 2,478 | 5,027 | 4,790 | 110,249 | 72,700 | 2,783 | 7,551 | --- |
| Pickled or salted | 1,228 | 3,439 | 36,786 | 15,478 | 3,133 | 80,760 | 223 | 72 |
| Canned | 6,902 | 4,022 | 48,757 | 118,680 | 95,610 | 18,702 | 1,145 | 8,282 |
| Lamb and Mutton | 70 | 24 | 11 | 4,535 | 123,742 | 24,709 | 8,772 | 7,161 |
| Sausage, bologna and frankfurters | 28 | --- | --- | 997 | 175 | 1,092 | 1/ | --- |
| Sausage, canned | 53 | 3 | 74,272 | 241,037 | 175,903 | 26,253 | 110 | 6,584 |
| Canned meat, other | 835 | 469 | 43,134 | 23,828 | 141,875 | 8,743 | --- | 43 |
| TOTAL | 63,548 | 30,732 | 329,636 | 710,787 | 1,104,838 | 923,988 | 341,780 | 97,323 |
| | | | | USSR | | | | |
| Beef and Veal | | | | | | | | |
| Corned beef, beef hash, roast beef and canned beef | --- | --- | --- | 2,731 | 4,482 | 77 | 9,421 | 15,950 |
| Pork | | | | | | | | |
| Hams and shoulders, cured | --- | --- | --- | 6,384 | 17,662 | 1,675 | 1,635 | --- |
| Bacon | --- | --- | --- | 29,620 | 16,852 | 4,068 | 19,992 | --- |
| Pickled or salted | --- | --- | --- | 43,644 | 254,476 | 150,527 | 81,020 | --- |
| Canned | --- | --- | --- | 64,531 | 121,757 | 62,477 | 47,538 | 1,706 |
| Sausage, bologna and frankfurters | --- | --- | --- | 674 | 198 | 422 | 8 | 40 |
| Sausage, canned | --- | --- | --- | 122,792 | 191,244 | 194,149 | 81,229 | 6,583 |
| Canned meat, other | --- | --- | --- | 14,530 | 213,987 | 202,942 | 28,324 | 69,256 |
| TOTAL | --- | --- | --- | 284,906 | 822,065 | 616,337 | 269,167 | 93,535 |
| | | | | Other Countries | | | | |
| Beef and Veal | | | | | | | | |
| Fresh and frozen, pickled and cured | 11,586 | 15,829 | 19,534 | 11,699 | 10,399 | 8,185 | 22,089 | 109,403 |
| Corned beef, beef hash, roast and canned beef | 570 | 448 | 781 | 965 | 673 | 1,764 | 29,337 | 52,062 |
| Pork | | | | | | | | |
| Fresh and frozen | 9,583 | 32,766 | 6,987 | 3,444 | 3,098 | 1,801 | 837 | 1,334 |
| Hams and shoulders, cured | 7,116 | 9,611 | 16,650 | 2,957 | 2,032 | 2,957 | 2,224 | 1,144 |
| Bacon | 5,760 | 6,556 | 10,627 | 5,993 | 2,655 | 1,345 | 2,169 | 300 |
| Cumberland and Wiltshire sides | 21 | 3 | 34 | 489 | 40 | --- | --- | 1/ |
| Pickled or salted | 11,460 | 12,340 | 26,135 | 12,239 | 9,716 | 16,057 | 26,425 | 4,395 |
| Canned | 1,415 | 2,689 | 3,521 | 47,317 | 25,075 | 40,269 | 23,638 | 10,953 |
| Lamb and Mutton | 442 | 591 | 603 | 632 | 451 | 603 | 1,051 | 478 |
| Sausage, bologna and frankfurters | 1,213 | 1,935 | 2,502 | 2,879 | 372 | 492 | 576 | 345 |
| Sausage, canned | 1,490 | 1,254 | 2,276 | 26,790 | 29,383 | 35,494 | 10,465 | 15,325 |
| Canned meat, other | 1,206 | 1,463 | 2,251 | 2,214 | 12,443 | 3,378 | 133,399 | 183,690 |
| TOTAL | 51,862 | 85,485 | 91,901 | 117,627 | 96,285 | 112,345 | 252,210 | 379,429 |
| | | | | Total, all countries, excl. U.S. territories | | | | |
| Beef and Veal | | | | | | | | |
| Fresh and frozen, pickled and cured | 11,823 | 15,909 | 19,792 | 12,566 | 35,512 | 25,399 | 55,296 | 167,269 |
| Corned beef, beef hash, roast and canned beef | 2,116 | 745 | 8,567 | 8,698 | 5,267 | 2,638 | 38,758 | 68,016 |
| Pork | | | | | | | | |
| Fresh and frozen | 14,911 | 39,810 | 7,177 | 74,549 | 318,903 | 551,265 | 228,758 | 15,297 |
| Hams and shoulders, cured | 49,984 | 17,330 | 66,794 | 71,266 | 148,991 | 81,552 | 56,604 | 4,428 |
| Bacon | 7,735 | 9,174 | 74,135 | 92,697 | 40,880 | 121,964 | 32,267 | 364 |
| Cumberland and Wiltshire sides | 2,499 | 5,030 | 4,824 | 110,738 | 72,740 | 2,783 | 7,551 | 1/ |
| Pickled or salted | 12,688 | 15,779 | 62,921 | 71,361 | 267,325 | 247,344 | 107,668 | 4,467 |
| Canned | 8,317 | 6,711 | 52,278 | 230,528 | 242,442 | 121,448 | 72,321 | 20,941 |
| Lamb and Mutton | 512 | 615 | 614 | 5,167 | 124,193 | 25,312 | 9,823 | 7,639 |
| Sausage, bologna and frankfurters | 1,241 | 1,935 | 2,502 | 4,550 | 745 | 2,006 | 584 | 385 |
| Sausage, canned | 1,543 | 1,257 | 76,548 | 390,619 | 396,830 | 255,896 | 91,804 | 28,492 |
| Canned meat, other | 2,041 | 1,922 | 45,385 | 40,672 | 368,305 | 215,063 | 161,723 | 252,989 |
| TOTAL | 115,410 | 116,217 | 421,537 | 1,113,311 | 2,021,833 | 1,652,670 | 863,157 | 570,287 |

1/ Less than 500 lbs.
Compiled from reports of the U. S. Department of Commerce.

Table 7.- United States exports of cattle, sheep and hogs from the United States, 1937-39 average, 1940-46

| Country of destination | Average 1937-39 | 1940 | 1941 | 1942 | 1943 | 1944 | 1945 | January-March 1946 |
|---|---|---|---|---|---|---|---|---|
| | Number | Number | Number | Number | Number | Number | Number | Number |
| | | | | Cattle | | | | |
| Mexico | 2,172 | 2,271 | 3,940 | 4,184 | 4,003 | 7,988 | 11,424 | |
| Venezuela | 277 | 103 | 84 | 8 | 36 | 336 | 1,882 | |
| Panama Canal Zone | 107 | 299 | 261 | 37 | --- | 202 | 203 | |
| Cuba | 243 | 261 | 166 | 287 | 6 | 41 | 67 | |
| Canada | 216 | 126 | 251 | 190 | 106 | 226 | 197 | |
| Chile | 30 | 87 | 3 | --- | --- | 1 | --- | |
| British Malaya | 72 | 66 | 92 | --- | --- | --- | --- | |
| Panama Republic | 89 | 5 | 3 | --- | --- | 157 | 88 | |
| Other countries | 356 | | | | | | 5,703 | |
| Total | 3,562 | 3,892 | 5,752 | 4,834 | 4,402 | 10,215 | 19,564 | 9,554 |
| | | | | Sheep and lambs | | | | |
| Mexico | 690 | 773 | 1,554 | 1,277 | 2,471 | 23,617 | 4,605 | |
| Canada | 253 | 40 | 18 | 123 | 31 | 186 | 11 | |
| Venezuela | 33 | --- | --- | --- | --- | 1,041 | --- | |
| China | 425 | --- | --- | --- | --- | --- | --- | |
| Japan | 119 | --- | --- | --- | --- | --- | --- | |
| Other countries | 70 | 31 | 40 | 4 | 21 | 22 | 265 | |
| Total | 1,590 | 844 | 1,612 | 1,404 | 2,523 | 24,866 | 4,881 | 362 |
| | | | | Hogs | | | | |
| Canada | 269 | 1,004 | 2 | 3 | 20 | 315 | 9 | |
| Mexico | 49 | 86 | 478 | 42 | 549 | 27,901 | 23,042 | |
| Other countries | 195 | 222 | 211 | 84 | 44 | 288 | 273 | |
| Total | 513 | 1,312 | 691 | 129 | 613 | 28,504 | 23,324 | 2,770 |

Compiled from Foreign Commerce and Navigation of the United States and other official records of the Department of Commerce.

Table 8.- United States imports of cattle, sheep and hogs for consumption and breeding, 1937-39 average, 1940-46

| Country of origin | Average 1937-39 | 1940 | 1941 | 1942 | 1943 | 1944 | 1945 | January-March 1946 |
|---|---|---|---|---|---|---|---|---|
| | Number | Number | Number | Number | Number | Number | Number | Number |
| | | | | Cattle | | | | |
| Mexico | 321,512 | 411,445 | 496,384 | 455,623 | 587,936 | 301,126 | 435,435 | 148,623 |
| Canada | 245,838 | 232,260 | 252,353 | 213,139 | 64,647 | 57,125 | 76,130 | 31,513 |
| British West Indies | 695 | --- | --- | --- | --- | --- | --- | --- |
| Other countries | 1,722 | 1,531 | 545 | 89 | 27 | 18 | 54 | --- |
| Total | 569,767 | 645,236 | 749,282 | 668,851 | 652,610 | 358,269 | 511,619 | 180,136 |
| | | | | Sheep and lambs | | | | |
| Mexico | 3,853 | --- | 7,847 | --- | 1,189 | 2,064 | | |
| British West Indies | 634 | --- | --- | --- | --- | --- | | |
| French West Indies | 190 | --- | --- | --- | --- | --- | | |
| Canada | 2,593 | 3,376 | 4,326 | 5,410 | 3,087 | 138,544 | | |
| Other countries | 1,360 | 7 | 29 | 53 | 12 | 125 | | |
| Total | 8,630 | 3,383 | 12,202 | 5,463 | 4,288 | 140,733 | 101,140 | 534 |
| | | | | Hogs 1/ (In thousand pounds) | | | | |
| Canada | 5,507 | 55 | 8,249 | 10 | 16 | 5 | 16 | 1 |
| Mexico | 6 | --- | 774 | 82 | --- | --- | --- | --- |
| Other countries | 53 | --- | --- | --- | --- | --- | --- | --- |
| Total | 5,566 | 55 | 9,023 | 92 | 16 | 5 | 16 | 1 |

1/ Excludes a small number for breeding.
Compiled from Foreign Commerce and Navigation of the United States and official records of the Department of Commerce.

## European Meat Production at Low Level

The United Kingdom, the principal meat importing country of the world, had prewar imports of around 3.4 billion pounds of meat a year. Continental Europe, excluding USSR, had a prewar net export balance of 300 to 400 million pounds a year. Only a relatively small part of the United Kingdom's imports were from the United States.

Table 9.- Meat production, consumption and world trade prewar, and estimated world meat production 1944 and 1945 1/

| Country | Prewar | | | 1944 | 1945 |
|---|---|---|---|---|---|
| | Production | Net imports or net exports (-) | Consumption 2/ | Production 3/ | Production 3/ |
| | Mil. lb. | Mil. lb. | Mil.lb. | Mil.lb. | Mil.lb. |
| United States | 16,182 | 65 | 16,303 | 24,648 | 22,891 |
| Canada | 1,417 | -161 | 1,256 | 2,620 | 2,408 |
| United Kingdom | 2,577 | 3,382 | 5,913 | --- | --- |
| Australia | 2,094 | -496 | 1,598 | 2,321 | 2,016 |
| New Zealand | 1,127 | -594 | 533 | 1,104 | 1,173 |
| Continental Europe (Excl. USSR) | 24,100 | -370 | 23,730 | 17,040 | 13,150 |
| South America | 8,200 | -2,030 | 6,170 | 8,500 | 7,800 |
| Other countries | 10,103 | --- | --- | --- | --- |
| Total 4/ | 65,800 | --- | --- | 66,100 | 59,300 |

1/ Carcass meat excluding edible offal.
2/ Or apparent disappearance.
3/ Preliminary.
4/ Total includes 40 countries, which in 1938 produced 66.3 billion pounds of meat out of an estimated total of 70 billion pounds for 67 countries excluding China.
Foreign data from Office of Foreign Agricultural Relations, USDA.

Hog numbers in Europe (including U.K. and Eire but excluding Russia) in early 1946, estimated at around 46 million head, were 57 percent less than the average for 1936-40. Total hog numbers in the United Kingdom were less than half as large as prewar. Hog numbers in Europe declined sharply during the war, chiefly because of a lack of imported feeds. The present world shortage of feed and food grains will prevent any great increase in hog numbers on the continent and in the United Kingdom in the next year or two. European hog numbers also declined during the first World War; it was not until 1926, or 8 years after the Armistice, that numbers were restored to about the prewar level. Meat production Europe, excluding the Soviet Union, was estimated to be 57 percent of prewar in 1945, compared with 71 percent of prewar in 1944.

The number of cattle in continental Europe in 1945 was estimated to be less than 90 percent of 1936-40, although cattle numbers in the United Kingdom were around 10 percent greater than prewar. Some increase in European cattle numbers, mostly dairy stock, is expected this year.

The British Ministry of Food, on behalf of the United Kingdom and other United Nations, has agreed to purchase Argentina's exportable meat surplus, excepting supplies for neutrals and other Latin American countries, until October 1, 1948. This will be principally beef, and on the basis of present livestock trends, purchases under the agreement will total 1,600 million pounds to 2,000 million pounds annually, dressed weight equivalent. The United Kingdom has agreed to purchase a minimum of 350 million to 400 million pounds of bacon and ham from Canada in 1947 and 1948. Exports this year from Canada to the United Kingdom will total at around 360 million pounds compared with an average of 165 million in 1934-38. Prewar exports of meat from Australia and New Zealand totaled around 1,100 million pounds and went chiefly to the United Kingdom. Exports from Australia and New Zealand in 1945 were around 25 percent greater than prewar, and with average weather in the next few years could easily be continued at this rate.

Table 10.- Total meat production, production under Federal inspection and non-inspected production, United States, 1900-46

(Data for cover page chart)

| Year | Total meat production excluding lard | Year | Meat production excluding lard: Total | Federally inspected | Other | Year | Meat production excluding lard: Total | Federally inspected | Other |
|---|---|---|---|---|---|---|---|---|---|
| | Mil. lb. | | Mil. lb. | Mil. lb. | Mil. lb. | | Mil. lb. | Mil. lb. | Mil. lb. |
| 1900 | 12,847 | 1916 | 15,907 | | | 1932 | 16,418 | 10,756 | 5,662 |
| 1901 | 13,141 | 1917 | 15,501 | | | 1933 | 17,317 | 11,651 | 5,666 |
| 1902 | 12,625 | 1918 | 17,341 | | | 1934 | 18,830 | 14,123 | 4,707 |
| 1903 | 13,362 | 1919 | 16,642 | | | 1935 | 14,423 | 9,424 | 4,999 |
| 1904 | 13,592 | 1920 | 15,334 | | | 1936 | 16,762 | 11,387 | 5,375 |
| 1905 | 14,219 | 1921 | 15,178 | 9,785 | 5,393 | 1937 | 15,709 | 10,312 | 5,397 |
| 1906 | 14,471 | 1922 | 16,138 | 10,657 | 5,481 | 1938 | 16,479 | 10,983 | 5,496 |
| 1907 | 14,782 | 1923 | 17,708 | 12,069 | 5,639 | 1939 | 17,534 | 11,609 | 5,925 |
| 1908 | 15,393 | 1924 | 17,595 | 11,982 | 5,613 | 1940 | 18,995 | 12,855 | 6,140 |
| 1909 | 14,740 | 1925 | 16,598 | 11,285 | 5,313 | 1941 | 19,493 | 13,433 | 6,060 |
| 1910 | 13,998 | 1926 | 16,649 | 11,465 | 5,184 | 1942 | 21,738 | 15,456 | 6,282 |
| 1911 | 14,869 | 1927 | 16,321 | 11,384 | 4,937 | 1943 | 24,136 | 16,833 | 7,303 |
| 1912 | 14,453 | 1928 | 16,248 | 11,439 | 4,809 | 1944 | 24,670 | 17,924 | 6,746 |
| 1913 | 14,475 | 1929 | 16,147 | 11,296 | 4,851 | 1/1945 | 22,891 | 15,363 | 7,528 |
| 1914 | 14,103 | 1930 | 16,016 | 10,992 | 5,024 | 2/1946 | 21,500 | | |
| 1915 | 14,886 | 1931 | 16,456 | 11,147 | 5,309 | | | | |

1/ Preliminary. 2/ Forecast.

Table 11.- Index numbers of physical volume of farm marketings, meat animals, 1935-44 average and 1945-46, 1935-39 = 100 1/

(Data for one section of inside cover page chart)

| Year | Jan. | Feb. | Mar. | Apr | May | June | July | Aug. | Sept. | Oct. | Nov. | Dec. |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1935-44 av. | 128 | 105 | 112 | 110 | 112 | 108 | 102 | 111 | 124 | 148 | 146 | 135 |
| 1945 | 163 | 124 | 122 | 118 | 126 | 119 | 113 | 121 | 133 | 172 | 172 | 151 |
| 1946 | 144 | 150 | 118 | | | | | | | | | |

1/ Unadjusted for seasonal variation.

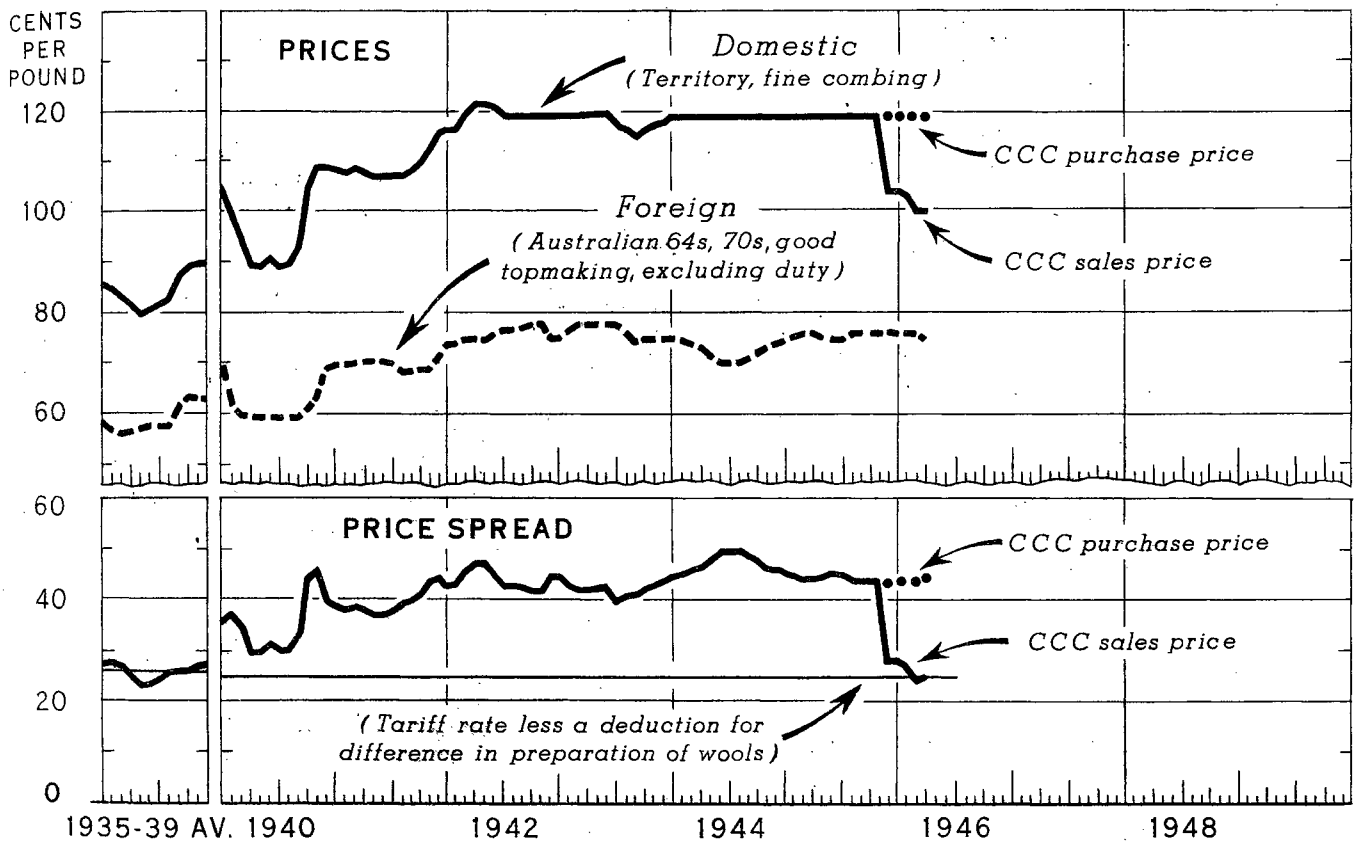
Livestock prices per 100 pounds (except where noted), marketings and slaughter statistics, by species, April 1946, with comparisons

PRICES

| Item | January-April 1944 | January-April 1945 | January-April 1946 | 1945 April | 1946 Feb. | 1946 March. | 1946 April |
|---|---|---|---|---|---|---|---|
| | Dol. | Dol. | Dol. | Dol. | Dol. | Dol. | Dol. |
| Cattle and calves | | | | | | | |
| Beef steers sold out of first hands, Chicago: | | | | | | | |
| Choice and prime | 16.38 | 16.74 | 17.46 | 17.27 | 17.46 | 17.35 | 17.24 |
| Good | 15.17 | 15.67 | 16.42 | 16.11 | 16.36 | 16.37 | 16.46 |
| Medium | 13.45 | 14.14 | 15.09 | 14.47 | 14.96 | 15.17 | 15.44 |
| Common | 11.51 | 12.02 | 12.56 | 12.47 | 12.32 | 12.84 | 13.21 |
| All grades | 14.97 | 15.46 | 16.36 | 16.14 | 16.14 | 16.26 | 16.56 |
| Good, grade cows, Chicago | 12.68 | 14.53 | 14.12 | 14.94 | 13.64 | 14.37 | 14.44 |
| Vealers: Gd. and ch., Chicago | 14.50 | 15.68 | 15.23 | 16.68 | 14.99 | 15.66 | 15.50 |
| Stocker and feeder steers, Kansas City | 12.59 | 13.22 | 14.84 | 13.90 | 14.71 | 15.22 | 15.86 |
| Av. price rec'd by farmers: | | | | | | | |
| Beef cattle | 11.72 | 12.05 | 12.80 | 13.10 | 12.60 | 13.10 | 13.70 |
| Veal calves | 13.08 | 13.45 | 13.98 | 13.90 | 13.90 | 14.10 | 14.30 |
| Hogs | | | | | | | |
| Av. market price, Chicago: | | | | | | | |
| Barrows and gilts | 13.70 | 14.74 | 14.84 | 14.75 | 14.85 | 14.85 | 14.85 |
| Sows | 12.70 | 14.00 | 14.08 | 14.00 | 14.10 | 14.10 | 14.10 |
| All purchases | 13.54 | 14.69 | 14.78 | 14.71 | 14.77 | 14.80 | 14.81 |
| Av. price rec'd by farmers for hogs | 12.90 | 13.98 | 14.18 | 14.10 | 14.20 | 14.20 | 14.20 |
| Av. price rec'd by farmers for corn 1/ | 113.8 | 106.8 | 112.8 | 107.0 | 111.0 | 114.0 | 116.0 |
| Hog-corn price ratio, U. S. 2/ | 11.4 | 13.1 | 12.6 | 13.2 | 12.8 | 12.5 | 12.2 |
| Sheep and lambs | | | | | | | |
| Lambs, gd. and ch., Chicago | 16.16 | 16.46 | 15.60 | 16.82 | 15.28 | 15.69 | 16.53 |
| Feeding lambs, gd. and ch., Omaha | 13.03 | 13.68 | 15.16 | 14.00 | 15.50 | 15.38 | 15.30 |
| Ewes, gd. and ch., Chicago | 8.56 | 8.98 | 7.94 | 9.48 | 7.90 | 8.01 | 8.60 |
| Av. price rec'd by farmers: | | | | | | | |
| Sheep | 6.61 | 6.70 | 6.73 | 7.17 | 6.64 | 6.88 | 7.03 |
| Lambs | 13.20 | 13.52 | 13.48 | 13.90 | 13.30 | 13.60 | 14.00 |
| Index retail meat prices 3/ | 130.5 | 130.6 | --- | 130.8 | 131.3 | 131.3 | |
| Index income of industrial workers 4/ | 339 | 331 | --- | 323 | 219 | 238 | |
| Number slaughtered under Federal inspection and market statistics | | | | | | | |
| | Thous. | Thous. | Thous. | Thous. | Thous. | Thous. | Thous. |
| Cattle | 4,179 | 4,624 | 3,645 | 979 | 1,015 | 904 | 715 |
| Calves | 2,029 | 2,054 | 1,796 | 477 | 427 | 484 | 445 |
| Sheep and lambs | 6,350 | 6,926 | 7,350 | 1,507 | 2,196 | 1,978 | 1,736 |
| Hogs | 28,674 | 15,106 | 17,103 | 3,066 | 4,698 | 3,636 | 3,858 |
| Av. live weight of hogs, 7 markets | Lb. 248 | Lb. 255 | Lb. 258 | Lb. 266 | Lb. 264 | Lb. 253 | Lb. 252 |
| Percent packing sows are of all purchases, 7 markets | Pct. 6 | Pct. 4 | Pct. 4 | Pct. 3 | Pct. 5 | Pct. 3 | Pct. 2 |

1/ Cents per bushel. 2/ Number of bushels of corn equivalent in value of 100 pounds of live hogs. 3/ Bureau of Labor Statistics, 1935-39 = 100. 4/ 1935-39 = 100.

# PRICES OF DOMESTIC AND FOREIGN FINE WOOLS, SCOURED BASIS, AT BOSTON, AND SPREAD BETWEEN THESE PRICES, 1935-39 AVERAGE, AND 1940-46




PRICES OF DOMESTIC AND FOREIGN WOOL COMPILED FROM REPORTS OF THE PRODUCTION AND MARKETING ADMINISTRATION

U.S. DEPARTMENT OF AGRICULTURE NEG. 45633 BUREAU OF AGRICULTURAL ECONOMICS

FIGURE 2.

As a result of recent reductions in Commodity Credit Corporation selling prices, prices paid by United States mills for domestic wools are now in more nearly normal relationship with prices of imported wools than at any time since 1939. The spread between Boston prices (scoured basis) of domestic fine combing territory wool and imported fine topmaking Australian wool, before payment of duty, was about 25 cents a pound in April. This was about the same as the 1935-39 average spread and was about equal to the import duty of 34 cents a pound with adjustment for the better preparation of imported fine wools.

# THE WOOL SITUATION

## Wool Prices will continue to Depend on Government Program

Prices of domestic wool to United States growers and to mills, at least until November 1, 1946, will continue to be determined by Government's purchase and sales program. Prices to growers will continue about at present levels during this period, since the CCC will continue to purchase wool until that date under the current purchase program. Since November 27, 1945, under a policy designed to permit sales of domestic wool at prices more or less in line with comparable foreign wool, CCC has been making domestic wool available to mills at prices much below the purchase price.

Prices of foreign wool are now largely determined by the prices at which the British Joint Organization is selling Australian, New Zealand and South African wool. These prices will remain unchanged through June 30, the end of the present selling season in those countries. Prices after June 30 will be determined largely by the British program for the new season. The British Joint Organization will regulate offerings when auctions are resumed. It will also be prepared to buy British Dominion wool at a "stabilization price" if the wool is not sold to commercial interests at this or a higher price. This will act as a support for prices in foreign markets.

World supplies of wool are unusually large, but most of the supply for export is controlled by the British Joint Organization. The Organization held about four-fifths of the 1945 total carry-over in the principal exporting countries and will hold an equally large part of the 1946 carry-over. Prices in South American markets have been firm in recent months and for most grades appear to be fully in line with prices of similar Australian and New Zealand wools.

## CCC Sales of Domestic Wool Relatively Small, Stocks Large

The increase in CCC sales of domestic wool which immediately followed the February price reduction was not maintained in following weeks. A year's sales at the March rate would amount to little more than half of our 1946 indicated domestic production. The 1946 clip is now arriving in volume for appraisal and purchase, and CCC stocks will increase rapidly unless sales to mills are greatly increased.

The greater part of CCC stocks of domestic wool are fine and halfblood wools. These grades constituted 75 percent of the shorn wool and about 47 percent of the pulled wool stocks (actual weight). About 17 percent of the shorn wool and 49 percent of the pulled wool stocks graded 3/8 blood and 1/4 blood.

## April 1 Carryover of Apparel Wool Much Larger than a Year Earlier

United States stocks of apparel wool have increased considerably during the past year. On April 1, stocks of apparel wool held by mills and dealers, and Government owned wool available to domestic mills, totaled abbut 835* million pounds, grease basis, compared with 679 million pounds a year earlier. Although current mill consumption is only about twice as large as the pre-war rate of consumption, stocks this year were about 4 times as large as the 1935-39 average April 1 stocks. These stocks do not include any appreciable quantity of the new seasons production, since little new-clip wool had moved to dealers by that date. In addition to these stocks, about 181 million pounds of British owned wool were stored in this country on April 1. This wool is being reexported however, and it is unlikely that any of it will be available for commercial use in the United States.

Privately owned stocks on April 1--largely foreign wool--were about 50 million pounds larger than a year earlier, reflecting large imports by commercial interests during the past year. United States Government stocks of domestic wool at 460 million pounds were 168 million larger than a year earlier. Because of the low rate of consumption of domestic wool, a considerable part of the 1945 domestic production went into Government stocks. United States Government stocks of foreign wool, which totaled 66 million pounds on April 1, 1945 have all been sold to domestic users, or allocated to foreign countries.

Table 11. - Stocks of domestic wool owned by the Commodity Credit Corporation on March 31, 1946, by grades

| Grade | Shorn | | Pulled | | Total | |
|---|---|---|---|---|---|---|
| | Greasy | Scoured | Greasy | Scoured | Actual weight | Grease basis 1/ |
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| Fine, 64/70s | 229,921 | 1,657 | 2,752 | 1,306 | 235,636 | 239,528 |
| Fine medium and 1/2 blood 60/64s and 60s | 68,116 | 2,136 | 7,309 | 5,587 | 82,948 | 89,591 |
| 3/8 blood, 58s - 56s | 46,603 | 1,887 | 6,267 | 10,098 | 64,855 | 71,651 |
| 1/4 blood, 50s - 48s 2/ | 20,439 | 531 | 396 | 887 | 22,253 | 23,088 |
| Low 1/4 blood, 46/48s | 2,874 | 132 | 68 | 285 | 3,359 | 3,562 |
| Common & braid, 36s - 44s | 1,830 | 15 | 15 | 99 | 1,959 | 1,998 |
| Other 3/ | 27,951 | 356 | 162 | 701 | 29,170 | 30,049 |
| Total | 397,734 | 6,714 | 16,969 | 18,763 | 440,180 | 459,467 |

1/ Approximate
2/ Include 50/56S scoured wool.
3/ Includes all offsorts which were not reported by grade.

Compiled from reports of the Commodity Credit Corporation
*As determined from scoured basis figures in Census' Advance Report.

Table 12.- Wool: Stocks held by mills and dealers and Government owned stocks, April 1, 1935-39 average and 1944-46 1/

| | 1935-39 average | 1944 | 1945 | 1946 1/ |
|---|---|---|---|---|
| | Million pounds | Million pounds | Million pounds | Million pounds |
| Wool available for domestic use | | | | |
| Apparel wool | | | | |
| Privately owned | | | | |
| Domestic wool | 163 | 77 | 74 | 78 |
| Foreign wool | 49 | 210 | 247 | 3/ 297 |
| Total | 212 | 287 | 321 | 375 |
| Government owned | | | | |
| Domestic wool (CCC) | --- | 184 | 292 | 460 |
| Foreign wool (DSC) | --- | 274 | 66 | --- |
| Total | --- | 458 | 358 | 460 |
| Total apparel wool | 212 | 745 | 679 | 835 |
| Carpet wool, privately owned | 46 | 40 | 66 | 96 |
| Wool held for shipment abroad | | | | |
| Onwed by British Government 4/ | --- | 465 | 447 | 181 |
| Owned by U. S. Government | --- | --- | -- | 5/ 1 |

1/ Excludes wool of the current years production except for small quantities which have moved to dealers prior to April 1.
2/ Determined in part from scoured basis figures in Census' Advance Report.
3/ Includes about 2 million pounds owned by War Assets Crop.
4/ Wool stored for the British Government is being reexported. None of this wool is likely to be available to commercial interests in the United States.
5/ Foreign wool held by Treasury Procurement but allocated to foreign countries.
Based on data from the Commodity Credit Corporation, Defense Supplies Corp. and Bureau of the Census. Reporting dates vary, but are approximately as of April 1. Privately owned stocks and CCC stocks converted to a grease basis. Stocks of foreign wool owned by the Defense Supplies Corp. and by the British Government are in actual weight but consist largely of grease wool.

## Record peacetime Consumption of Wool Indicated for 1946

United States mill consumption of apparel wool in 1946 probably will be close to the wartime annual average of a billion pounds, grease basis, and will be much larger than in any previous peacetime year. Weekly average consumption in March of about 21* million pounds, grease basis, was equivalent to an annual rate of about 1,100* million pounds. The rate of consumption in the first quarter of 1946 was about 20 percent higher than in the latter half of 1945. Present demand for wool clothing and demand for fabrics and clothing for commercial inventory replenishment undoubtedly would support an even higher rate of mill consumption.

Completion of the reconversion to civilian production and improvement in the labor situation contributed to the increase in mill consumption in the early months of the year. In February, 153,900 workers were employed in this industry compared with 134,300 at the low point in August 1945. Employment in February was 5 percent larger than a year earlier. A further increase was indicated for March. In recent months, the absence of strikes, increasing wages, and prospects of steady employment, have increased the attractiveness of employment in the woolen and worsted industry in relation to many other manufacturing industries. Average hourly earnings in the industry were 98.8 cents in February compared with 92.2 cents in January and 85.8 cents in February 1945. Weekly wages averaged $41.04 in February compared with an average of $40.60 for all manufacturing industries.

## Production of Civilian Fabrics Up Sharply

United States production of woolen and worsted woven fabrics totaled about 142 million linear yeards in the first quarter of 1946 compared with 123 million yards in the final quarter of 1945. January-March production was only 7 percent larger than that of a year earlier. Practically all of the production this year was for civilian use. In the early months of 1945 about half of the production was for military. The January-March rate of fabric production, on an annual basis, was half again as large as the 1939 rate of production. Total production of civilian fabrics in 1946 will likely be much larger than in any previous peacetime year. The increase in total production in the first quarter of the year compared with 1939 was chiefly in women's wear fabrics. Production of men's wear fabrics was only a sixth higher than the 1939 rate of production, while production of women's wear fabrics was more than twice as high.

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* As determined from scoured basis figures in Census Advance Report.

To stimulate production of men's wear fabrics, the OPA in February removed certain suiting fabrics from the provision of the Maximum Average Price Regulation for manufacturers who exceeded their base period production of these items. Similar exemption was later provided for overcoatings. These modifications, and provisions for channelling a greater part of available supplies of heavy-weight fabrics to the men's clothing industry under the low-cost clothing program are intended to improve the situation at retail. However, a shortage of linings, pocket material, and bindings has added to the difficulty of increasing production of men's wool clothing.

Table 13.- Woven wool cloth: Production by United States mills, annual 1939, 1942-44 and by quarters, 1945-46

| | Apparel fabrics | | | | | Non-apparel fabrics | | | Total woven fabrics |
|---|---|---|---|---|---|---|---|---|---|
| | Mens wear | Womens wear | General use 1/ | Other Apparel | Total Apparel | Blankets | Other 2/ | Total 2/ | |
| | Mil.yds. | Mil.yds. | Mil.yds. | Mil.yds. | Mil.yds. | Mil.yds. | Mil.yds. | Mil.yds. | Mil.yds. |
| 1939 | 178.9 | 107.1 | 25.7 | 9.4 | 321.1 | 19.6 | 31.3 | 50.9 | 372.0 |
| 1942 | 277.0 | 107.6 | 63.4 | 8.8 | 456.8 | 64.1 | 6.9 | 71.0 | 527.8 |
| 1943 | 256.8 | 132.1 | 44.0 | 7.7 | 440.6 | 89.3 | 6.6 | 95.9 | 536.5 |
| 1944 | 218.5 | 171.3 | 46.9 | 5.1 | 441.8 | 78.9 | 8.2 | 87.1 | 528.9 |
| 1945 | | | | | | | | | |
| 1st quarter | 54.0 | 37.3 | 15.4 | 1.6 | 108.3 | 23.0 | 2.1 | 25.1 | 133.4 |
| 2nd quarter | 61.2 | 22.3 | 12.4 | 2.3 | 98.2 | 27.8 | 1.6 | 29.4 | 127.6 |
| 3rd quarter | 44.0 | 32.1 | 9.8 | 1.9 | 87.8 | 18.0 | 2.2 | 20.2 | 108.0 |
| 4th quarter | 44.6 | 49.6 | 11.0 | 2.0 | 107.2 | 11.4 | 5.9 | 17.3 | 124.5 |
| Total | 203.8 | 141.3 | 48.6 | 7.8 | 401.5 | 80.2 | 11.8 | 92.0 | 493.5 |
| 1946 | | | | | | | | | |
| 1st quarter | 51.9 | 55.0 | 12.9 | 2.1 | 121.9 | 12.8 | 7.4 | 20.2 | 142.1 |

1/ Includes melton, mackinaw, snow and ski-suit cloth, linings and inter-linings, and bathrobe flannels.

2/ Excludes woven felts which are reported by weight.

All yardage is on an equivalent 54-inch linear yard basis, except blankets which are on a 72-inch linear yard basis.

Compiled from Bureau of the Census Facts for Industry and Advance Reports.

Prices per pound of wool and other textile fibers, United States, 1943-46

| Item | Annual average 1943 | Annual average 1944 | Annual average 1945 | 1945 Mar. | 1945 Apr. | 1946 Mar. | 1946 Apr. |
|---|---|---|---|---|---|---|---|
| | Cents | Cents | Cents | Cents | Cents | Cents | Cents |
| Prices received by farmers, grease basis, 15th of month | 41.6 | 42.4 | 41.9 | 40.5 | 40.7 | 40.7 | 41.4 |
| Boston, market: 1/ | | | | | | | |
| Territory, scoured basis- | | | | | | | |
| 64s, 70s, 80s, staple combing | 117.8 | 119.0 | 117.7 | 119.0 | 119.0 | 99.5 | 99.5 |
| 56s combing | 104.2 | 104.5 | 103.5 | 104.5 | 104.5 | 38.5 | 38.5 |
| Bright fleece, greasy- | | | | | | | |
| 64s, 70s, 80s delaine | 46.9 | 47.0 | 47.0 | 47.5 | 47.5 | 40.0 | 40.0 |
| 56s combing | 54.2 | 54.5 | 54.0 | 54.5 | 54.5 | 46.5 | 46.5 |
| Foreign wool, in bond: | | | | | | | |
| Scoured basis- | | | | | | | |
| Australian 64s, 70s good top-making 2/ | 75.9 | 72.1 | 75.2 | 75.5 | 75.5 | 75.5 | 74.7 |
| Cape, short combing | 72.5 | 72.5 | 72.5 | 72.5 | 72.5 | 3/67.5 | 3/67.5 |
| Grease basis- | | | | | | | |
| Montevideo 60-64s | 41.4 | 39.4 | 39.6 | 39.2 | 39.4 | 41.5 | 41.5 |
| Montevideo 1s (56s) | 41.4 | 40.7 | 42.2 | 42.5 | 42.5 | 42.5 | 42.5 |
| Other textile fibers: | | | | | | | |
| Cotton, 15/16-inch | | | | | | | |
| Middling 4/ | 20.6 | 21.2 | 22.6 | 21.8 | 22.1 | 26.8 | 27.7 |
| Rayon staple fiber 5/ | | | | | | | |
| Viscose 1-1/2 denier | 24.4 | 24.8 | 25.0 | 25.0 | 25.0 | 25.0 | 25.0 |
| Acetate 5 denier | 43.0 | 41.9 | 38.0 | 38.0 | 38.0 | 38.0 | 38.0 |

Domestic wool prices are from the Production and Marketing Administration; foreign wool prices are from the Boston Commercial Bulletin except as noted, and are before payment of duty.
1/ Domestic wool prices based on CCC selling prices, 1944 to date. 2/ Quotations from the Production and Marketing Administration. 3/ New series beginning 1946 prices are for Cape 10-12 months superior spinners style, and are not strictly comparable with earlier data. 4/ Average at 10 markets. 5/ F.o.b. producing plants, Bureau of Labor Statistics.

Wool: Mill consumption in the United States, 1944-46

| Item | Total 1944 | Total 1945 | Weekly averages 1945 Jan. 1/ | Weekly averages 1945 Feb. 2/ | Weekly averages 1946 Jan. 1/ | Weekly averages 1946 Feb. 2/ |
|---|---|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| Grease basis: | | | | | | |
| Apparel wool- | | | | | | |
| Domestic | 318,595 | 251,735 | 8,326 | 8,290 | 2,107 | 2,562 |
| Foreign | 690,364 | 761,046 | 13,379 | 14,370 | 15,975 | 17,442 |
| Total | 1,008,959 | 1,012,781 | 21,705 | 22,660 | 18,082 | 20,004 |
| Carpet wool | 61,166 | 76,087 | 1,237 | 1,094 | 2,808 | 3,504 |
| Scoured basis | | | | | | |
| Apparel wool- | | | | | | |
| Domestic | 150,861 | 120,357 | 3,970 | 3,978 | 1,020 | 1,245 |
| Foreign | 426,152 | 468,891 | 8,164 | 8,817 | 9,779 | 10,660 |
| Total | 577,013 | 589,248 | 12,143 | 12,795 | 10,799 | 11,905 |
| Carpet wool | 45,757 | 55,885 | 898 | 799 | 2,020 | 2,492 |

Compiled from reports of the Bureau of the Census.
1/ 5-week period. 2/ 4-week period.

## BAE "SITUATION" REPORTS

| | |
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| The Cotton Situation | (Monthly) |
| The Dairy Situation | (Monthly) |
| The Demand and Price Situation | (Monthly) |
| The Farm Income Situation | (Monthly) |
| The Fats and Oils Situation | (Monthly) |
| The Feed Situation | (Monthly) |
| The Fruit Situation | (Quarterly) |
| The Livestock and Wool Situation | (Monthly) |
| The Marketing and Transportation Situation | (Monthly) |
| The National Food Situation | (Monthly) |
| The Poultry and Egg Situation | (Monthly) |
| The Tobacco Situation | (Quarterly) |
| The Vegetable Situation | (Quarterly) |
| The Wheat Situation | (Bi-monthly except monthly for July and August) |
| The World Sugar Situation | (Annually) |

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