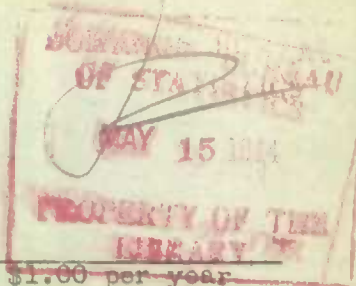


WEEKLY BULLETIN

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Economic Conditions During First Quarter of 1944

Each of the six major factors indicating the trend of economic conditions recorded gains in the first quarter of this year over the same period of 1943. The most influential movements were advances in productive operations and in the deposit liabilities of the chartered banks. An index of the physical volume of business advanced $7\frac{1}{2}$ per cent over the first quarter of 1943. The average of the four main classes of bank deposits recorded during the first three months an increase of 18.6 per cent. The average was \$4,286 million against \$3,615 million in the same period of 1943. Notice deposits rose to a new high position. The increase in the index of wholesale prices over the first quarter of 1943 was slightly more than 5 per cent, the standing on the base of 1926 having been 102.7.

The index of common stocks receded one-half point in March from the preceding month, the standing on the base of 1935-39 having been 81.5. The standing in the first quarter was 81.7, an increase of 4.7 per cent over the same period of 1943. Long term Dominion bonds have shown market stability for some time especially in the last twelve months. The shorter term maturities have advanced in price, the yields having moved to a somewhat lower position. Speculative trading was at a considerably higher level in the first quarter of the present year than in the same period of 1943.

Agricultural marketings recorded a marked gain in the first quarter of the present year. The index of grain marketings in March was 244.2 compared with 108.4 in the same month last year. In the same comparison the index of live stock marketings moved up from 110.7 to 116.4, the average for the quarter recording a marked advance. The index of cold storage holdings which had been 124.2 on April 1 last year rose to 245.3 on the same date of 1944.

Cattle slaughtering rose 32 per cent, the total in the first quarter of the year being 396,000 head. The gain in hog slaughtering was even greater, the total in the period under review having been 2,807,000 head, an increase of more than 77 per cent. Some decline was recorded in the production of creamery butter, while a gain of nearly 21 per cent was shown in the output of factory cheese, the total in the first quarter of the year having been 7.8 million pounds.

While the index of mineral production recorded a gain, decline was shown in the receipts of gold at the Mint. Coal production at 4.6 million tons recorded a decline of nearly 3 per cent. Employment in the mining industry showed recession, the index having been 158.3 against 162.0 in the first quarter of 1943.

An index of manufacturing production rose more than 5 per cent to 302.8 in the first quarter of 1944. The tobacco industry was more active as measured by the release of cigarettes. The total in the first quarter was 3,022 million against 2,872 million, a gain of 5.2 per cent. A slight gain was also shown in the release of cigars. The cotton textile industry was less active, the consumption of cotton dropping from 48.7 million pounds to 43.9 million pounds, a decline of 9.8 per cent. Newprint production recorded a gain of 4.6 per cent over the standing of the first quarter of last year. Minor percentage gains were shown in the output of steel and pig iron over the high levels of the first quarter of 1943. Coke production rose 38 per cent to 1,033,000 short tons.

The consumption of primary power increased from 8.5 billion kilowatt hours to 9.3 billion, the indicated gain having been 9.3 per cent. The construction industry was more successful in obtaining new business. Contracts awarded during the first four months were reported at \$83.7 million, a gain of \$25.6 million or 44 per cent over the same period of 1943.

Production of Coal and Coke in March

The output of coal from Canadian mines during March amounted to 1,549,092 tons as compared with 1,688,463 in the corresponding month of last year, a decrease of 8.2 per cent. Production during the first three months of 1944 totalled 4,635,458 tons compared with 4,826,631 in the similar period of 1943.

Production in March was as follows by provinces, totals for the corresponding month of last year being in brackets: Nova Scotia, 579,678 (603,862) tons; Alberta,

579,159 (752,083); British Columbia, 211,166 (189,535); Saskatchewan, 148,639 (113,202); New Brunswick, 30,450 (29,633).

Production of coke in April amounted to 356,000 tons compared with 331,000 in the previous month and 276,000 in the corresponding month of last year. During the first three months of this year production totalled 1,032,000 tons compared with 758,000 in the similar period of last year.

March imports of coal were recorded at 1,382,819 tons as compared with 1,285,189 in March of last year, while the total for the first quarter was 3,693,823 tons compared with 3,045,976 in the similar period of 1943.

Visible Supply of Wheat

Stocks of Canadian wheat in store or in transit in North America at midnight on May 4 totalled 306,319,670 bushels, including 283,589,881 bushels in Canadian positions and 22,729,789 bushels in United States positions. On the corresponding date of last year the stocks amounted to 414,497,253 bushels.

Farmers' Marketing of Wheat and Coarse Grains

Deliveries of wheat from the farms in the Prairie Provinces during the week ending May 4 amounted to 3,858,316 bushels as compared with 5,629,669 in the previous week, increasing the total for the elapsed portion of the crop year which commenced August 1 to 223,839,257 bushels from 194,118,451 in the similar period of the previous crop year.

The following quantities of coarse grains were also delivered from the farms in the Prairie Provinces during the week ending May 4, totals for the previous week being in brackets: oats, 3,744,189 (4,722,324) bushels; barley, 1,461,099 (1,965,147); rye, 71,650 (93,168); flaxseed, 36,469 (53,305).

Production of Creamery Butter in April

Butter production in April fell to 19,882,000 pounds, a decline of 13.6 per cent from April of last year when the output totalled 23,011,000 pounds. All provinces shared in the decline except Saskatchewan where an increase of 7.5 per cent was shown. Up to the end of April, 55,743,000 pounds were produced, representing a decline of 12.4 per cent as compared with the first four months of 1943. Despite the decline in production, the heavy stock position recorded at October 1, 1943, made it possible to provide sufficient butter for the winter and early spring period. This situation will now be reversed; as the production season opens it will be necessary to build up reserves in order to take care of the requirements during the October to April period of 1944-45.

Pastures have been rather poor to date so that an increase in milk production is not anticipated. The subsidy on cheese is expected to favour the production of this commodity at the expense of butter. This being the case the stocks available on October 1, 1944, are likely to fall below the heavy holdings recorded at the same date in 1943. A bright spot in the situation is the increase in the number of cows on farms and it is believed that a considerable number of heifers will be coming into maturity later on. Whether the cows are milked or sold may depend to a considerable extent on the availability of farm labour.

Production of Cheese in April

Cheese production in April advanced to 7,894,000 pounds, an increase of 35.5 per cent over the same month a year ago. The cumulative output for the first four months of this year was 15,676,000 pounds, or 27.8 per cent above that recorded in the similar period of 1943. All provinces showed increases during the four-month period.

It is apparent that the subsidy of 30 cents per hundred pounds has had a considerable bearing on the increased production of cheese. The fact that the 20-cent subsidy shall prevail during the production season commencing May 1 promises to maintain cheese output at a comparatively high level. Cheese factories are opening up a little earlier than they did a year ago.

Storage Stocks of Food on May 1

Stocks of creamery butter in Canada on May 1 totalled 9,282,697 pounds, including 8,022,697 pounds in storage and 1,260,000 pounds in transit by rail. On April 1, stocks amounted to 11,452,114 pounds while last year's May 1 stocks were 11,315,307 pounds. The five-year average for May 1, 1939-43, was 9,649,000 pounds.

Cheese holdings amounted to 18,888,860 pounds compared with 20,597,960 pounds on April 1 and 17,612,762 pounds on the corresponding date of last year. On May 1 this year 152,000 pounds in transit were included. In transit stocks were not obtained last year. Stocks of evaporated whole milk owned by manufacturers totalled 8,539,119 pounds as compared with 8,663,924 on April 1 and 8,153,616 on May 1, 1943.

Total shell eggs were 10,376,027 dozen as compared with 6,670,196 on April 1 and 5,118,900 on May 1, 1943. Frozen egg meats increased to 21,393,286 pounds from 13,315,136 pounds on April 1 and 5,330,757 on the corresponding date of last year. Poultry stocks at 16,096,855 pounds were also much larger than the holdings of May 1 last year when there were only 4,058,073 pounds in storage. Last month the quantity was 20,205,265.

Apples in storage have decreased rapidly in the last month. There were 223,626 bushels as compared with 621,611 last month and 323,817 on May 1 a year ago. Frozen fruit and fruit in preservatives totalled 25,086,320 pounds. Last month the holdings were 28,530,172 pounds. Vegetables frozen and in brine amounted to 992,969 pounds as compared with 1,394,937 on April 1.

Potato stocks were 104,242 tons, being much larger than last year's total of 60,477 tons, but a decrease from April 1 stocks when the total on hand was 137,655. Onion holdings were down to 147 tons, with another 69 tons of imported stocks. At the same date last year there were 4,806 tons of Canadian onions on hand.

Holdings of frozen fish totalled 18,339,762 pounds. Cod totalled 4,450,584 pounds, haddock 967,461, salmon 1,856,989, sea herring 2,290,009, smoked fillets 810,835 and other frozen fish 7,906,802 pounds.

Stocks of meat were still very large, although there was some reduction from the huge stocks of last month. Pork holdings were 98,845,902 pounds as compared with 104,520,456 on April 1 this year and 54,942,376 a year ago. Beef stocks were down to 30,379,355 pounds from 35,381,287 last month. A year ago there were only 17,672,701 pounds on hand. Veal increased to 4,578,717 pounds from 2,554,246 a month ago and 2,523,183 pounds last year. Mutton and lamb in storage were 5,381,031 pounds as compared with 7,008,234 on April 1 this year and 1,534,892 on May 1, 1943.

Acreage Intentions in Field Crops

An increase of close to 4,000,000 acres in the area to be seeded to wheat this year compared with 1943 was indicated by crop correspondents on April 30 when reporting to the Dominion Bureau of Statistics the 1944 acreage intentions of Canadian farmers. This increase will occur largely at the expense of oats, barley, flaxseed and summer-fallow, and will take place mainly in the three Prairie Provinces. Subsequent developments affecting seeding operations may alter farmers' plans as they stood at the end of April and the figures used herein carry that reservation.

The acreage intended for wheat in 1944 is 21,325,800 acres compared with 17,487,700 acres planted in 1943. This increase of 3,838,100 acres corresponds closely to the decrease which took place in 1943 compared with 1942, so that if this year's intentions are carried out, the wheat acreage in Canada will be back to approximately the 1942 level.

Practically all the change is indicated in western Canada where the 1944 wheat acreage planned is 20,483,000 acres compared with 16,729,000 acres seeded in 1943, an increase of 3,754,000 acres. Saskatchewan indicates an increase of 2,460,000 acres, Alberta 966,000 acres, and Manitoba 328,000.

Oats acreage intended in Manitoba shows very little change from a year ago, but both Saskatchewan and Alberta report a probable decrease of seven per cent. The other six provinces are holding at the 1943 level or proposing an increase, so that the acreage indicated for all Canada is only three per cent down from last year. Total acreage for the Dominion is placed at 14,950,200 acres compared with 15,406,900 acres in 1943.

Barley acreage for all Canada is placed at 94 per cent of the 1943 figures and again the Prairie Provinces indicate most of the reduction, Saskatchewan proposing a 10 per

cent decrease, Alberta five per cent and Manitoba four per cent. The eastern provinces, with the exception of Nova Scotia, report moderate increases in barley acreage in prospect, while British Columbia indicates no change from a year ago. The total for Canada is placed at 7,872,800 acres compared with 8,396,800 acres last year.

The acreage intended for flaxseed in 1944 is reported to be 30 per cent less than the area planted in 1943, or just over 2,000,000 acres compared with nearly 3,000,000 acres a year ago. Most of this crop is produced in western Canada and Saskatchewan leads the way with a proposed reduction of 729,000 acres. Alberta is next with a cut of 104,000 acres and in Manitoba a reduction of 43,000 acres is contemplated.

It was estimated at the end of April that seven per cent of the 735,000 acres seeded to fall wheat in Ontario in 1943 for this year's harvest was winter-killed, leaving 684,000 acres producing at that time. The condition of the crop on April 30 was 91 per cent compared with 83 per cent a year earlier and 102 per cent at the end of April 1942. Approximately 16,000 acres of fall rye in Ontario and the three Prairie Provinces were lost through winter-killing or 6 per cent of the total area seeded last fall. The condition figure at the end of April was 91 per cent of normal, or the same as it was a year earlier.

Indexes of Wholesale Sales in March

The dollar volume of wholesale trading in Canada in March averaged nine per cent higher than in the corresponding month of last year. The general unadjusted index of sales on the base, 1935-1939=100, stands at 189.7 for March, 166.3 for February and 173.4 for March, 1943. Cumulative sales for the first quarter of the year increased 11 per cent over the similar period of last year.

An increase in trading activity was prevalent in each of the economic divisions of the country in March, but the expansion of sales varied from two per cent in British Columbia to 17 per cent in the Maritime Provinces. Gains recorded by regions were as follows: Maritimes, 17 per cent; Quebec, four; Ontario, 11; Prairies, 13; British Columbia two.

Factory Sales of Electric Storage Batteries

Sales of electric storage batteries and parts by principal Canadian producers were valued at \$2,478,000 during the first quarter of 1944 compared with \$2,426,000 in the previous three months and with \$1,959,000 in the first quarter of 1943. Sales included batteries for the ignition of internal combustion engines to the value of \$1,504,000, cells for farm lighting plants value at \$108,000, and batteries valued at \$475,000 for other purposes, including those for telephone switchboards. Miscellaneous parts and supplies for batteries were valued at \$330,000.

Production of Stone in Canada in 1942

The gross value of all varieties of stone produced in Canada during 1942 totalled \$8,747,000 compared with \$8,001,000 in 1941. Comprising the tonnage shipped in 1942 were 6,442,583 tons of limestone valued at \$6,468,525; 1,366,425 tons of granite valued at \$1,946,249; 153,865 tons of sandstone valued at \$226,810; 13,824 tons of marble valued at \$88,209, and 1,369 tons of slate worth \$16,801. To the total value of domestic stone produced in 1942, quarries in the province of Quebec contributed 47.6 per cent, Ontario 34.1, and British Columbia 4.5.

Production of Leather Footwear in March

Production of leather footwear in Canada in March amounted to 3,340,343 pairs, an increase of 5.2 per cent over March of last year when the output totalled 3,173,967 pairs. During the first three months of this year production was recorded at 9,008,825 pairs compared with 8,594,359 in the similar period of last year.

Tuberculosis Institutions in Canada

The number of institutions for the care and treatment of tuberculous patients in Canada rose from 65 in 1939 to 79 in 1942. Beds increased from 10,160 in 1939 to 11,245, or by 10.7 per cent. Admissions in 1939 were 10,751 and 12,050 in 1942, an increase of 12 per cent. Patient days' care increased from 3,394,975 in 1939 to 3,760,284 days in

1942, an increase of 10.8 per cent, while the daily average under care increased from 9,379 to 10,303 in 1942, a percentage increase of 9.9.

Although there was an increase of 1,085 beds in the four-year period, Canada is faced with an acute shortage of beds according to a recent survey made by the Canadian Tuberculosis Association. The supply of beds which has been adequate only in a few provinces has shown but a small increase during the war period while the number of cases diagnosed has increased sharply during the same period due to the X-ray examination of over a million recruits for the armed forces and the increased number of mass surveys. This number will be sharply increased when the armed forces are X-rayed again on demobilization.

Canada's Trade with Bermuda

About 15 per cent of Bermuda's imports last year were received from Canada, the value being \$1,725,000, whereas in 1942 the total of \$1,333,000 was only 3.3 per cent of the whole. The decrease in the value of the merchandise from Canada was accounted for largely by lesser requirements for whiskey, bran, hay, millfeeds, mixed grains, bacon, mutton, cheese, groceries, canned milk, flour and electrical supplies, but there were substantial increases in oats, seed potatoes, malt liquor, lumber, furniture, paper, confectionery, fish, canned fruit, lard substitutes, pork and canned soup.

During the year prior to the war Bermuda's imports from Canada were of the value of \$1,418,000 and the principal item was canned vegetables at \$333,000. Bermuda's exports to Canada in 1943 at \$30,700 were about half the amount in the last pre-war year. The principal commodities in 1943 were lily bulbs, flower bulbs and cut flowers.

The Canadian trade commissioner at New York, in forwarding the information says that although there has been a reduction in Canada's exports to Bermuda, chiefly due to the short supply situation in the Dominion of many products required by Bermuda, there are at present more than 150 Canadian agencies in the colony.

A very interesting item in Bermuda's imports in 1942 was \$8,885,000 from South Africa which declined to \$31 in 1943. The large amount in 1942 represented imports of diamonds. The details of Bermuda's trade may be obtained from the Commercial Intelligence Journal of April 29, 1944.

Stocks of Raw Hides and Skins

Stocks of raw cattle hides held by tanners, packers and dealers in Canada at the end of March amounted to 446,346 as compared with 467,708 at the end of the previous month and 449,184 at the end of March, 1943. Stocks of other types included the following, totals for March of last year being in brackets: calf and kip skins, 399,947 (600,959); goat and kid skins, 135,275 (50,557); sheep and lamb skins, 1,022,672 (957,324).

Car Loadings on Canadian Railways

Car loadings for the week ended April 29 amounted to 71,455 cars as compared with 70,224 in the previous week and 63,832 for the corresponding week of last year. In the eastern division loadings increased from 42,198 cars last year to 43,703, and in the western division from 21,634 to 27,752 cars.

Stocks of United States Grain in Canada

Stocks of United States grain in Canada on May 4 amounted to 2,799,817 bushels as compared with 3,930,990 on the corresponding date of last year. Stocks of wheat totalled 2,071,816 bushels against nil a year ago, corn 715,125 bushels against 3,907,464, and soybeans 12,876 bushels against nil.

Stocks of Canned Fruits and Vegetables

Stocks of canned fruits and vegetables held by canners, wholesale dealers and chain store warehouses in Canada on April 1 were heavier than on the corresponding date of last year. Canned fruit stocks totalled 981,512 dozen cans compared with 959,085 dozen, and canned vegetables 6,152,969 dozen cans as compared with 5,187,626 dozen.

Stocks of canned fruits on hand on April 1 included the following, in dozen cans, totals for April 1 last year being in brackets: apples, including crabapples, 47,547 (17,274); apricots, 17,498 (25,090); blueberries, 38,381 (3,103); cherries, 40,325 (35,027); fruit cocktail and fruits for salad, 4,298 (15,523); grapefruit, 28,069 (25,059); loganberries, 4,108 (345); peaches, 173,538 (380,340); pears, 461,997 (345,704); pineapple, 685 (3,014); plums, gages, etc., 136,550 (91,059); raspberries, 5,022 (6,455); rhubarb, 10,823 (411); strawberries, 1,539 (1,780).

Stocks of canned vegetables on April 1 were as follows, in dozen cans, figures for 1943 being in brackets: asparagus, 58,888 (35,653); green or wax beans, 608,968 (398,862); baked beans, 955,703 (279,740); beets, 50,481 (18,606); carrots, 84,967 (16,828); carrots and peas combined, 13,973 (24,697); corn, 1,061,060 (774,857); mixed vegetables, 9,362 (10,537); peas, 1,549,541 (1,784,622); pumpkin, 318,736 (244,209); spinach, 33,988 (25,703); tomatoes, 1,330,739 (1,528,193).

Reports Issued During the Week

1. Annual Report of Tuberculosis Institutions, 1941 & 1942 (25 cents).
 2. Car Loadings on Canadian Railways (10 cents).
 3. Stocks of Raw Hides and Skins, March (10 cents).
 4. Production of Leather Footwear, March (10 cents).
 5. Canadian Grain Statistics (10 cents).
 6. Ice Cream Production, 1942 (15 cents).
 7. Stone Industry, 1942 (50 cents).
 8. Coal and Coke Statistics, March (10 cents).
 9. Economic Conditions during First Quarter, 1944 (10 cents).
 10. Factory Sales of Electric Storage Batteries, First Quarter, 1944 (10 cents).
 11. Value of Farm Lands, 1943 (10 cents).
 12. Monthly Indexes of Wholesale Sales, March (10 cents).
 13. Current Trends in Food Distribution, March (10 cents).
 14. Cold Storage Holdings of Meat and Lard, May 1 (10 cents).
 15. Stocks of Fruit and Vegetables, May 1 (10 cents).
 16. Stocks of Dairy and Poultry Products, May 1 (10 cents).
 17. Cold Storage Holdings of Fish, May 1 (10 cents).
 18. Monthly Dairy Review, April (10 cents).
 19. Final Report on Stocks of Canned Fruits & Vegetables on Hand, April 1 (10 cents).
 20. Acreage Intentions in Field Crops, 1944 (10 cents).
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