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World Wheat Situation

With a record wheat crop in the United States now fairly well assured, and production in Canada much greater than it was in 1943, the total supply of wheat in North America for the 1944-45 season would appear to be as great as it was during the crop year 1943-44. Substantial stocks of wheat are held also in Argentina and Australia, thus assuring ample stocks to take care of a considerable enlargement in international wheat movement during the next twelve months.

The latest official estimate places production of wheat in the United States this year at 1,132,000,000 bushels, a record for that country. The carry-over of old wheat amounted to 316,000,000 bushels and total supplies, exclusive of imports in both years, are only 10,000,000 bushels less for the coming season than they were in 1943-44.

Canada's wheat crop is now being harvested in the Prairie Provinces and while the first official estimate will not be made until September 12, several private estimates have been published indicating a crop of about 450,000,000 bushels. Such a crop, added to the carry-over of 355,000,000 bushels on August 1, would give the Dominion almost as much wheat as was available during the 1943-44 crop year.

Both Canada and the United States greatly reduced their reserve stocks of wheat during the past year but the 1944 harvests promise to offset the reduction in the United States almost wholly, and in Canada very largely. This means that Canada will be in a position to export very liberally and still continue a high rate of domestic utilization during the coming year.

It is significant that Canada disposed of about 533,000,000 bushels of wheat during the twelve months ended July 31, 1944. Exports accounted for about 344,000,000 bushels of this total, including the disappearance of about 160,000,000 bushels of Canadian wheat in the United States. This rate of exports could be maintained in the new season and still leave a carry-over of about 275,000,000 bushels at the end of next July.

The position in Argentina and Australia will be influenced to a large extent by war developments. Both countries have a good supply of surplus wheat, although Australia's new crop prospects are not very promising and her statistical position might be back to normal in 1945. Exports from Australia have been heavier in recent months and drought is a serious threat to the crop that will be harvested in November and December this year.

Argentina is still largely dependent on Brazil and Spain for the reduction of her wheat surplus and is holding heavy stocks. Her new crop prospects are fairly bright and her supply position is likely to remain a little top-heavy during the coming year. Less wheat is likely to be diverted to fuel use in the 1944-45 season and the fact that the Government is offering a bonus to farmers who store wheat on their farms is taken to indicate that the storage problem might become acute in the new season.

Any appraisal of the probable world demand for wheat in the 1944-45 season can be of little value at this time in view of the rapid and far-reaching changes in the war situation in Europe and in the Pacific zone, but even should it reach 700,000,000 bushels, which would be the largest in years, it would be comparatively simple for the four chief exporting countries to furnish this amount during the season.

The news concerning European crops this year continues generally favourable in character. The Continent, with some exceptions, appears to have a fairly good wheat crop in sight, while the United Kingdom again reports a good crop in the making, although acreage might be less than it was in 1943. The total wheat crop in Europe is judged by some authorities to be less than it was last year, and less than average, but in the absence of authentic information from Nazi-dominated areas it is difficult to assess the new crops.

Turkey appears to be the most favoured of the south-eastern countries, while Spain on the other side of the Continent is again harvesting a sub-normal crop, although it is believed to be better than anticipated earlier in the season. Portugal is also short in wheat supplies and will continue to import fairly liberal quantities.

Crop Conditions in Canada

Harvesting is in full swing in all provinces and in general good crops are reported. Local showers have delayed threshing in some areas but another two to three weeks will see much of the work completed. Showers during the past ten days have relieved the situation in the Maritime Provinces considerably. Conditions are now excellent in Prince Edward Island and New Brunswick but more moisture is needed in Nova Scotia. Harvesting of grains is general and yields on the whole are better than average. The prospects for the potato crops in Prince Edward Island and New Brunswick are promising but yields in Nova Scotia are spotty. Harvesting of cereals is now under way in all sections of Quebec and yields generally are good. The potato crop is also promising. In Ontario harvesting of grain is nearing completion and silo filling has commenced in some sections. Potatoes, corn and sugar beets are showing the effects of the drought. The outlook for the dry pea and soybean crops is good but white bean yields are reduced.

Showery weather is delaying harvesting operations in many areas of the Prairie Provinces, however, much of the grain is out and threshing will be general in the next two weeks. Manitoba reports from 50 to 75 per cent of the crop out in the south and from 10 to 40 per cent in the balance of the province. Wheat yields of from 20 to 25 bushels are general but higher yields are indicated in the northern areas. Showers have delayed harvesting in Saskatchewan but late crops have benefited. For the province as a whole 48 per cent of the wheat and 32 per cent of the coarse grains has been cut. Threshing is becoming general and relatively good yields are being reported except from the south-western districts. Good progress is being made with the harvest in Alberta although warm, dry weather is needed in the central areas. In the south where drought was serious, average yields of about five bushels are reported but prospects are good to excellent throughout the central district as far north as Edmonton. In the Peace River area cutting is well advanced and some threshing has been done, with only fair yields. Hail occurred at scattered points during the past week and some frost is reported from northern Saskatchewan and Alberta. However, damage to date has not been severe. Pastures generally are good and livestock is in good condition.

Cool weather and frequent showers have delayed the grain harvest in British Columbia. Cutting of cereals is now well under way. The tree fruit crops will be the largest on record.

Visible Supply of Wheat

Stocks of Canadian wheat in store or in transit in North America at midnight on August 24 totalled 291,660,542 bushels compared with 385,631,384 on the corresponding date of last year. Stocks this year included 270,436,192 bushels in Canadian positions and 21,224,350 in United States positions.

Marketings of Wheat and Coarse Grains

Deliveries of wheat from the farms in the Prairie Provinces during the week ending August 24 amounted to 4,437,363 bushels compared with 1,895,882 in the previous week. The following quantities of coarse grains also were delivered, totals for the previous week being in brackets: oats, 1,391,618 (1,161,092) bushels; barley, 1,284,334 (728,680); rye, 185,754 (91,328); flaxseed, 104,626 (40,635).

Production of Wheat Flour in July

A tapering off in wheat flour production was visible in July with the monthly production amounting to 1,741,564 barrels, the lowest output in any month of the crop year 1943-44. In spite of the lighter production, Canada's wheat flour total for the crop year 1943-44 topped all previous years, the amount being 24,288,877 barrels compared with 23,549,707 barrels in 1942-43.

The amount of wheat ground in Canadian mills during July was 7,710,268 bushels compared with 8,636,790 in July of last year. The following quantities of coarse grains also were ground in July, totals for July 1943 being in brackets: oats, 1,255,736 (1,271,399) bushels; corn, 107,889 (192,650); barley, 499,687 (468,746); buckwheat, 200 (707); mixed grain, 1,440,944 (1,855,812) bushels.

Unemployment Insurance Benefits in July

A total of 3,106 persons applied for unemployment insurance benefit in Canada during July compared with 3,226 in June and 1,087 in July, 1943. The number of persons who signed the live unemployment register during the last six working days of July totalled 4,488 as compared with 4,707 in the similar period of the previous month. During July, 3,850 claims were forwarded to insurance offices for consideration and 3,233 were considered entitled to benefit.

The number of persons paid benefit during July was 4,753 compared with 7,983 in June and 1,868 in July, 1943. These persons were paid a total of \$135,250 for 71,035 compensated unemployed days in July, \$247,891 for 128,922 days in the previous month and \$45,581 for 25,166 days in July, 1943.

The average number of days for which benefit was paid in July was 14.9 compared with 16.1 in June and 13.5 in July of last year, while the average amount of benefit paid per beneficiary was \$28.46 in July this year, \$31.05 in June and \$24.40 in July, 1943. The daily rate of compensation in July was \$1.90 compared with \$1.92 in June and \$1.81 in July of last year.

Output of Central Electric Stations in July

Central electric stations produced 3,149,328,000 kilowatt hours in July as compared with 3,411,697,000 in the corresponding month of last year. Primary power declined by 185,166,000 kilowatt hours or six per cent and secondary power by 77,203,000 kilowatt hours or 24.3 per cent. During the seven months ended July total Canadian output was 23,678,493,000 kilowatt hours compared with 23,085,919,000 in the similar period of 1943.

The use of secondary power in Canada declined from 199,275,000 kilowatt hours in July last year to 126,336,000, and the consumption of primary power, including losses, declined from 2,970,090,000 to 2,789,092,000. There has been an almost continuous decline in the daily average consumption of primary power from the all-time high of 103,479,000 kilowatt hours in November 1943 to 89,997,000 in July.

Exports to the United States in July amounted to 236,514,000 kilowatt hours compared with 242,332,000 in the corresponding month last year, while the total for the seven months ended July aggregated 1,515,441,000 kilowatt hours compared with 1,522,146,000 in the comparable period of 1943.

Civil Aviation in May

Civil air carriers transported 34,778 revenue passengers in May as compared with 25,204 in the corresponding month of last year, an increase of 38 per cent. The amount of revenue freight carried increased from 553,250 pounds to 708,134, or by 28 per cent, while mail decreased from 641,493 to 581,783 pounds. Operating revenues of Canadian licensed carriers increased from \$1,295,722 to \$1,492,544, but operating expenses increased from \$1,232,571 to \$1,570,454, reducing net operating revenues from \$63,151 to a debit of \$77,910.

Financial Statistics of Provincial Governments

The Dominion Bureau of Statistics has issued a bulletin presenting financial statistics of Provincial Governments in Canada for fiscal years ended nearest to December 31, 1941. This publication includes summaries of revenues and expenditures, assets and liabilities and other analytical detail concerning funded debt, etc., for 1941, for each of the nine provinces as well as abstract comparisons with 1940.

One notable improvement over earlier reports of this nature is the inclusion of additional tables which present a combined picture of both ordinary and capital revenues and expenditures. It is planned further to implement desirable changes, and include additional material, following the decisions of the 1943 Dominion-Provincial Conference on Provincial Financial Statistics and work of a Continuing Committee appointed thereat. As a further result of these efforts and with the continued collaboration of Provincial authorities it is also hoped to publish these statistics on a more current and up-to-date basis than has been possible in the past.

Copies of this study may be obtained on application to the Dominion Statistician, price 25 cents.

Index Number of Wholesale Prices in July

The general index number of wholesale prices, on the base 1926=100, stood at 102.5 in July, being unchanged from the June tabulation. It was, however, 2.4 points higher than in July of last year.

Department Store Sales in July

The dollar volume of department store sales in July was four per cent higher than in the corresponding month of last year, but declined 22 per cent from the June level. Unadjusted indexes, on the base 1935-1939=100 stood at 116.8 for July this year, 150.3 for June and 112.5 for July, 1943. Sales in the first seven months of 1944 were eight per cent above sales in the same period of last year.

Country General Store Sales in July

July dollar sales realized by country general stores increased four per cent over the volume of business transacted in the corresponding month of last year. Advances were recorded in all provinces except Manitoba where a minor decline was shown. The general unadjusted index of sales, on the base 1935-1939=100, stands at 170.5 for July, 169.1 for June and 164.0 for July, 1943. Cumulative sales for the seven months ended July advanced nine per cent above the volume of business transacted in the similar period of 1943.

Building Permits in July

The value of building permits issued by municipalities reporting to the Dominion Bureau of Statistics in July was \$12,878,145 compared with \$14,673,080 in the preceding month and \$9,910,304 in the corresponding month of last year. Permits issued during the first seven months of the current year totalled \$76,374,548 compared with \$45,185,921 in the comparable period of 1943.

Cheques Cashed in Clearing Centres in July

Cheques cashed against individual accounts in July recorded an increase of 7.4 per cent over the corresponding month of last year, the total being \$4,733,000,000 compared with \$4,406,000,000. Advances were shown in each of the five economic areas. During the seven months of this year the amount of cheques cashed was \$34,460,000,000 compared with \$29,873,000,000 in the comparable period of 1943, an increase of 15.4 per cent.

Debits were as follows by economic areas in July, totals for July of last year being in brackets: Maritime Provinces, \$104,307,907 (\$104,951,253); Quebec, \$1,384,588,614 (\$1,597,576,117); Ontario, \$2,011,006,672 (\$2,246,513,177); Prairie Provinces, \$936,145,062 (\$957,557,949); British Columbia, \$297,413,283 (\$312,763,137).

Securities Trade in June

Net sales of securities by Canada to other countries were \$10,200,000 in June compared with \$18,700,000 in May and \$6,600,000 in April. The general character of this inflow of capital was the same as formerly, with sales of Canadian bonds remaining the dominant element. In the first half of 1944 the balance of sales to all countries was \$59,900,000 compared with \$99,000,000 in the similar period of last year.

There were net sales of each group of Canadian bonds in the trade with the United States in June. Some concentration occurred in trade in Dominions, net sales of which accounted for \$3,300,000 out of the total net sales of Canadian bonds to the United States of \$8,400,000. While the volume of trading in Canadian stocks was greater than in any earlier month of the year, there was only a negligible balance of sales of these securities. Net repurchases from the United Kingdom of \$1,300,000 were distributed between Canadian bonds and stocks. Trading with other countries produced net sales of \$100,000.

External Trade During Seven Months of 1944

The value of Canada's external trade during the seven months ended July was \$3,063,-480,000, exclusive of gold. This total was higher than in any other similar period in history, and was only slightly below the aggregate for the calendar year 1941. The increase over the corresponding period of 1943 was \$478,285,000, or 18.5 per cent. During the month of July the total was \$430,235,000 compared with \$457,410,000 in July, 1943.

Domestic merchandise exports during the seven months of the current year were valued at \$2,024,980,000 compared with \$1,581,408,000 in the comparable period of 1943, an increase of 28 per cent. The July total was \$278,713,000 compared with \$303,645,000 in July of last year.

Commodity imports during the seven months ended July were valued at \$1,012,981,000 compared with \$990,567,000 in the like period of 1943, an increase of 2.2 per cent. During July the value was \$148,452,000 compared with \$150,883,000 a year ago.

Duties collected on imports during the first seven months of 1944 totalled \$103,-037,000 compared with \$93,798,000 in the same period of 1943, an increase of 10.8 per cent. Collections during the month of July amounted to \$13,278,000 compared with \$15,-023,000 in July, 1943.

Canada's Merchandise Imports in July

Canada's merchandise imports in July were valued at \$148,452,000 compared with \$150,-883,000 in the corresponding month of last year. The total for the seven months ended July was \$1,012,981,000 compared with \$990,567,000 in the similar period of 1943, an increase of 2.2 per cent. The United States accounted for the bulk of the imports, the total in July having been \$124,005,000 compared with \$120,001,000 in July of last year, and in the seven months ended July \$832,972,000 compared with \$808,399,000 a year ago.

Commodity imports from the United Kingdom in July were valued at \$5,863,000 compared with \$14,247,000 in July, 1943, the value for the seven months ended July amounting to \$60,325,000 compared with \$79,538,000 in the comparable period of 1943. July imports from other leading countries were as follows, totals for July 1943 being in brackets: British India, \$2,629,000 (\$1,264,000); British Guiana, \$1,078,000 (\$1,148,000); Jamaica, \$1,191,000 (\$1,311,000); Newfoundland, \$1,352,000 (\$1,183,000); Australia, \$1,597,000 (\$426,000); Colombia, \$1,071,000 (\$123,000); Mexico, \$1,283,000 (\$1,145,000).

The following were amongst the leading commodities imported in July, comparisons with July 1943 being in brackets: fruits, \$6,826,000 (\$5,142,000); cotton, \$8,036,000 (\$6,406,000); wool, \$2,321,000 (\$4,987,000); rolling mill products, \$4,291,000 (\$6,106,000); engines and boilers, \$5,384,000 (\$4,224,000); farm implements, \$5,097,000 (\$2,339,000); machinery, except agricultural, \$5,670,000 (\$10,548,000); vehicles, \$6,863,000 (\$6,911,000); electrical apparatus, \$3,994,000 (\$4,453,000); coal, \$10,180,000 (\$9,133,000); petroleum products, \$8,628,000 (\$9,073,000); chemicals, \$6,471,000 (\$6,082,000).

Production of Crude Petroleum in June

The Canadian production of crude petroleum and natural gasoline in June amounted to 824,507 barrels compared with 858,403 in the previous month and 826,119 in the corresponding month of last year. During the first six months of the current year the output totalled 5,035,837 barrels compared with 5,037,370 in the similar period of 1943. Alberta's production in June was recorded at 700,045 barrels, including 657,850 barrels from the Turner Valley field.

Production of Natural Gas in June

Production of natural gas in Canada in June totalled 2,827,485,000 cubic feet compared with 3,278,079,000 in the preceding month and 2,513,464,000 in June of last year. During the first six months of this year the output aggregated 26,412,289,000 cubic feet compared with 24,274,508,000 in the like period of 1943.

Sales of Gasoline in May

Sales of motor, tractor and aviation grades of gasoline in Canada during May amounted to 95,994,000 gallons compared with 64,214,000 in April and 81,086,000 in the corresponding month of last year. During the five months ended May the sales totalled 345,199,000 gallons compared with 298,500,000 in the same period of 1943.

Hog Numbers on Canadian Farms

Hog production in Canada has passed its peak according to the June 1 survey of the Dominion Bureau of Statistics. Numbers of swine on farms at June 1, 1944 at 7,740,800 are five per cent below those of the same date of 1943 and a decline of 32 per cent is indicated in numbers of sows to farrow in the fall of this year. The relatively small decline in numbers at June 1 will probably not be reflected in commercial marketings as a higher percentage of total hog sales has been entering commercial channels this year in order to secure the advantage of government quality subsidies. It appears likely, however, that marketings in the early months of 1945 from fall farrowed pigs will be substantially below the marketings of the early months of 1944.

Numbers of swine on farms were maintained or increased in the five eastern provinces and in British Columbia but declines are indicated in each of the three Prairie Provinces. These provinces also report the most serious declines in numbers of sows to farrow. Winter hog production increased rapidly in the Prairie Provinces during the war years to meet the increased demand for pork but it appears that farmers in that area are sharply reducing this phase of their production program.

Financing of Motor Vehicle Sales in July

Financing of new and used motor vehicles in Canada in July totalled 3,173 units with a financed value of \$1,377,400. Declines below July, 1943, when 4,368 vehicles were financed for \$1,585,764, amounted to 27 per cent in number and 13 per cent in dollar volume. Included in the July 1944 totals were 214 new vehicles which were financed to the extent of \$266,693. Used vehicle financing declined 31 per cent in number and 24 per cent in dollar volume, 2,959 units being financed for \$1,110,707 compared with 4,289 transactions involving \$1,468,338 in July, 1943. There were 1,236 new vehicles financed in the first seven months of 1944 compared with 437 in the same period of last year, while used vehicles financed totalled 20,107 compared with 23,516.

Variety Store Chains in 1943

Stable conditions in recent years in the variety chain field with little or no change in the number or identity of firms or stores or in the volume of business transacted constitutes the outstanding feature of the results of a survey compiled by the Dominion Bureau of Statistics. There were 19 chain companies operating in Canada in 1943 and these had 521 stores with \$84,366,200 sales, a volume of business practically unchanged from the \$84,319,200 worth of business conducted by the same 19 companies through 523 outlets in 1942.

Factory Sales of Electric Storage Batteries

Sales of electric storage batteries and parts by principal Canadian producers were valued at \$2,525,998 during the second quarter of 1944 compared with \$2,478,435 in the first quarter and with \$2,164,541 in the second quarter of 1943.

Stocks of United States Grain in Canada

Stocks of United States grain in store in Canada on August 24 amounted to 1,510,461 bushels compared with 383,124 on the corresponding date of last year. Wheat stocks totalled 800,401 bushels compared with nil, corn 450,615 bushels compared with 359,598, and soybeans 259,645 bushels compared with nil.

Car Loadings on Canadian Railways

Car loadings on Canadian railways during the week ended August 19 increased to 69,513 cars from 67,847 in the previous week, but decreased from the 72,550 cars loaded in the corresponding week of last year. In the eastern division loadings declined from 46,659 cars in 1943 to 44,405, and in the western division from 25,891 cars to 25,108.

The larger decreases from loadings in the corresponding week of last year were: grain, 287 cars; coal, 1,580 cars; logs and other forest products, 517 cars; petroleum oils, 414 cars; automobiles, 454 cars; and miscellaneous, 673 cars. Live stock increased by 343 cars, pulpwood 171 cars, paper 199 cars and fresh fruit by 187 cars.

Loadings of revenue freight during July amounted to 297,000 cars as compared with 315,000 in June and 293,000 in the corresponding month of 1943.

Reports Issued During the Week

1. Railway Revenue Freight Loadings, July (10 cents).
 2. Car Loadings on Canadian Railways (10 cents).
 3. Sales and Purchases of Securities Between Canada and Other Countries, June (10 cents).
 4. Cheques Cashed in Clearing Centres, July (10 cents).
 5. Canadian Grain Statistics (10 cents).
 6. Milling Statistics, July (10 cents).
 7. Building Permits, July (10 cents).
 8. Indexes of Country General Store Sales, July (10 cents).
 9. Financial Statistics of Provincial Governments, 1941 (25 cents).
 10. Prices and Price Indexes, July (10 cents).
 11. Civil Aviation, May (10 cents).
 12. Preliminary Report on Department Store Sales, July (10 cents).
 13. Central Electric Stations, July (10 cents).
 14. Statistical Report on the Operation of the Unemployment Insurance Act, July (10 cents).
 15. Telegraphic Crop Report, Canada (10 cents).
 16. Petroleum and Natural Gas Production, June; and Petroleum Fuels Sales, May (10 cents).
 17. Summary of Canada's Imports, July (10 cents).
 18. Imports by Principal Countries, July (10 cents).
 19. Trade of Canada, July (10 cents).
 20. Hog Numbers on Canadian Farms, June 1 (10 cents).
 21. Factory Sales of Electric Storage Batteries, Second Quarter, 1944 (10 cents).
 22. Variety Store Chains, 1943 (25 cents).
 23. Financing of Motor Vehicle Sales, July (10 cents).
 24. Monthly Review of the Wheat Situation (10 cents).
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