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Business Operations in July

The recession in productive operations in evidence since the beginning of the year was continued in July. The index of the physical volume of business on the five year pre-war base receded from 238.8 in June to 232.2 in the month under review, the five main components participating in the general decline in this comparison. The index of mineral production, however, was nearly maintained, the change being from 225.5 to 225.4. Coal production was 1,171,000 tons against 1,234,000 in the preceding month. Gold receipts at the Mint dropped sharply from 255,400 fine ounces to 215,093.

The index of manufacturing which had been 292.2 in June receded to 287.6. The flour milling industry was more active in the latest month for which statistics are available. The release of tobacco recorded decline, the index receding from 149.8 to 131.5. Cigarettes released from bond amounted to 881.9 million against 934.7 million, the decline being of a contraseasonal character. The meat packing industry showed decline from the high level of the preceding month, the index of the output dropping from 199 to 187. The dairy industry was less active, the output of cheese receding from 30.9 million pounds to 28.1 million. The production of creamery butter was 41.5 million pounds against 45.5 million.

The export of canned salmon showed marked gain in the latest month. The index indicating the trend of operations in the textile industry was 130.9 against 134.5. The shipment of planks and boards showed increase among the factors indicating the trend of forestry operations. The output of newsprint was 244,406 tons against 246,864. Pig iron production rose to a higher point, the output having been 166,000 tons against 161,899. Decline, however, was shown in the production of steel ingots. The index indicating operations in the entire iron and steel group was 583 against 590 in June. The decline in the imports of crude petroleum was less than normal for the season.

New business obtained for the construction industries was at a somewhat lower level, the index receding from 111.8 to 98.8. Declines were shown both in construction contracts awarded and in building permits, the setback in the latter being less than normal for the season. The output of electric power receded from 3,326 million kilowatt hours to 3,149 million. The general index of commodity distribution declined more than 10 points to 170.3. Advances were recorded in distribution from retail and wholesale outlets after the usual adjustment. The index of tons carried by steam railways was 192.9 against 224.4. Merchandise imports receded from \$152.5 million to \$148.5 million. After seasonal and price adjustment, however, the index rose from 171 to 177. Exports, exclusive of non-monetary gold, showed a considerable decline, the total having been \$281.8 million against \$346 million.

Economic Activity in July compared with the Preceding Month
1935-1939=100

	1944	
	July	June
Physical Volume of Business	232.2	238.8
Industrial Production	262.1	266.8
Mineral Production	225.4	225.5
Gold Receipts	68.2	82.4
Coal Production	123.2	124.0
Manufacturing	287.6	292.2
Flour Production*	168.5	157.6
Rolled Oats Production*	58.9	78.0
Inspected Slaughtering	187.3	198.7
Cattle	127.4	120.6
Sheep	68.1	63.9
Hogs	239.7	265.9
Creamery Butter	111.4	116.2
Factory Cheese	138.0	153.8

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Economic Activity in July compared with the Preceding Month
1935-1939=100

	1944	
	July	June
Tobacco	131.5	149.8
Cigar Releases	108.2	131.6
Cigarette Releases	133.4	151.3
Boots and Shoes Production*	142.3	136.0
Textiles	130.9	134.5
Cotton Consumption	111.5	125.4
Forestry	112.8	121.1
Newsprint	95.4	97.0
Iron and Steel	582.9	590.1
Pig Iron Production	250.4	236.0
Steel Production	213.1	230.2
Construction	98.3	111.8
Contracts Awarded	109.7	126.3
Building Permits	135.1	131.2
Cost of Construction	135.6	135.7
Electric Power	154.8	160.2
Distribution	170.3	180.8
Marketings -		
Grain and Live Stock Marketings	361.7	270.4
Grain Marketings - Country Elevators	420.6	307.8
Wheat	633.6	455.4
Oats	772.0	632.3
Live Stock Marketings	106.0	108.3
Cattle	107.0	109.6
Calves	87.5	83.3
Hogs	127.0	133.3
Sheep	57.2	47.9
Cold Storage Holdings, 1st of following month	187.1	197.3
Butter	102.5	115.5
Cheese	155.6	180.2
Beef	183.3	174.4
Pork	188.8	196.6
Mutton	371.4	385.5
Poultry	282.2	246.9
Lard	496.0	563.7
Veal	196.1	192.7

*Preceding Month

Crop Conditions in the Prairie Provinces

Heavy rains delayed harvesting operations in many areas of the Prairie Provinces during the past week. Combining and threshing were at a standstill in almost all areas of Manitoba, in south-eastern and northern Saskatchewan and to a lesser extent in central Alberta. In the areas of heaviest rainfall some deterioration in the grade of grain has taken place through sprouting and clear dry weather is urgently needed. Frost damage has not been severe except in the extreme north-western area of Saskatchewan.

Heavy rains fell in almost all districts of Manitoba and at some points in the Red River Valley as much as six inches fell during the past week. Harvesting has been impossible but more settled weather is indicated early this week. The grades of all cereals will be lowered as much sprouting has occurred in the stock and swath. The corn crop has been badly twisted and much of the area is flooded. Pastures are good in Manitoba.

Saskatchewan crops have been well maintained for the province as a whole, but some deterioration has been caused by heavy rains in the south-east and north-east, by sawfly in the south-central and west-central areas, by hail in the Melfort area and by frost in the extreme north-west. Fifty-seven per cent of the wheat crop and sixty-one per cent of the coarse grain acreage has been cut over the entire province. Pastures are standing up well and livestock are in good condition.

Clear weather at the end of the week permitted the resumption of harvesting operations in Alberta after widespread wet weather. Harvesting is now about 70 per cent completed in the southern part and cutting is about 50 per cent completed in the central and northern areas. Threshing has commenced in scattered areas. Cutting is about completed in the Peace River District and threshing has commenced. No serious frost damage has been reported.

Sawfly damage continues to be reported from south-central and west-central Saskatchewan. Grasshoppers are migrating locally and pale western cutworm moths are flying.

Visible Supply of Canadian Wheat

Stocks of Canadian wheat in store or in transit in North America at midnight on August 31 amounted to 288,892,548 bushels, a decrease of 96,230,610 bushels from the total in store on the corresponding date of last year. Stocks this year included 266,401,563 bushels in Canadian positions and 22,490,985 in United States positions.

Marketings of Wheat and Coarse Grains

Deliveries of wheat from the farms in the three Prairie Provinces during the week ending August 31 totalled 5,917,568 bushels compared with 4,687,547 in the previous week. During the first full month of the crop year 1944-45 deliveries from the farms totalled 14,691,480 bushels compared with 15,487,081 in the same period of the previous crop year.

The following quantities of coarse grains were also delivered from farms in the three Prairie Provinces during the week ending August 31, totals for the previous week being in brackets: oats, 1,350,157 (1,481,214) bushels; barley, 1,960,316 (1,827,656); rye, 148,225 (198,885); flaxseed, 99,391 (108,277) bushels.

Stocks of Butter, Cheese and Eggs in Nine Cities

Butter holdings in nine of the principal cities of Canada at the opening of business on September 1 totalled 42,151,342 pounds compared with 50,016,655 on the corresponding date of last year. Cheese stocks were 40,739,872 pounds compared with 31,872,283. Total shell eggs on hand were 8,254,814 dozen compared with 2,517,547, while frozen egg holdings were 33,175,650 pounds compared with 16,651,972.

Fruit and Vegetable Crop Prospects

The current estimate of production of the various fruit crops grown in Canada shows only a slight change from that of a month ago, except in the case of apples. A reduction of 7.4 per cent is indicated in the apple harvest in Nova Scotia, resulting from the prolonged dry weather and the consequent small sizing of the fruit. This more than offset slight improvement in the Ontario and Quebec crops. The third estimate of 15,391,600 bushels is some 422,000 bushels smaller than the July outlook, but the crop is still 19 per cent greater than that of the 1943 season. The ten-year 1933-42 average production is 14,084,300 bushels.

An increase of approximately four per cent in the total pear crop brings the present estimate to 627,900 bushels compared with 605,300 bushels of a month ago. Increases are recorded in Ontario and British Columbia with the Nova Scotia crop remaining unchanged. The crop this year is only slightly larger than the ten-year 1933-42 average of 601,100 bushels.

The estimate of the plum crop shows a similar increase during the month to bring the crop to 379,200 bushels. The present estimate is only four per cent greater than the 1943 crop, but is 24 per cent above the ten-year average of 304,900 bushels. The peach estimate is practically unchanged from a month ago at 1,712,700 bushels. The crop is 171 per cent greater than that of last season, but is still well below the record crop in 1942 of 2,003,000 bushels. Little change has been made in the estimate of the grape crop since last month with production being set at 54,770,000 pounds. The crop this season is two per cent greater than the 1943 harvest, and is 14 per cent above the ten-year average harvest.

Continued dry weather throughout Eastern Canada has reduced the crop prospects for most vegetables. In British Columbia, on the other hand, frequent showers and cooler weather have favoured vegetable production and adequate supplies of all kinds are now moving rapidly to market.

August 1 Cost of Living Index

The Dominion Bureau of Statistics cost of living index number, on the base 1935, 1939 = 100, declined from 119.0 for July 3 to 118.9 for August 1, 1944. Seasonal decreases in prices for fresh vegetables were mainly responsible for this minor change. The food index fell from 132.0 in July to 131.5 in August with lower quotations for onions, cabbage, carrots, potatoes and lamb being partially offset by increases for eggs, lemons and oranges.

Additional reductions in electricity rates in the provinces of Quebec and Ontario caused the fuel and light index to fall from 108.9 to 108.7. The electricity sub-group index now stands at 93.2. Home furnishings and services advanced fractionally from 118.3 to 118.5 on scattered increases affecting items of furniture, textile furnishings and hardware. Other group indexes remained unchanged, rentals at 111.9, clothing at 121.5, and miscellaneous items at 109.0.

World Cost of Living Movements

Index numbers of living costs in the first half of 1944 continued to rise in most countries. The rate of increase was generally moderate, except in certain countries of Latin America and in Iceland. The United States Bureau of Labor index of living costs has shown only fractional changes since the early summer of 1943. Food prices in June, 1944, averaged 4.4 per cent below June, 1943, a contrast to the rate of increase during the preceding year when food prices had risen 15.2 per cent. Declines in food prices since June, 1943, have been offset by a rise in the home furnishings index which advanced 8.2 per cent in the first half of 1944.

Throughout the first half of 1944 the Canadian cost of living index remained fractionally below the levels reached in the last four months of 1943. The June, 1944, index was 0.3 per cent below that of December, 1943, although still 0.4 per cent higher than in June, 1943. The Ministry of Labour index for the United Kingdom rose 0.5 per cent in February influenced by higher coal prices, and remained at that level through June. Levels of food, rent and miscellaneous items remained unchanged.

The Mexican cost of living index continued an advance which has been unbroken since the end of 1942. It increased 16 per cent in the first half of 1944, due in large measure to a 21 per cent increase for foods. A new series for Peru also showed an accelerated rate of increase of 9.5 per cent between December and June, as compared with 15.3 per cent for the year ending June, 1944.

In Reykjavik, Iceland, living costs after declining sharply in the first half of 1943, have risen again steadily since then. There was a 3.5 per cent increase in the first half of 1944, but the June, 1944, index was still 1.5 per cent below the December, 1942, peak. The wartime increase to June 1944 approximated 160 per cent.

Quarterly cost of living index numbers for Australia, which had recorded their first wartime declines in the second half of 1943, rose only 0.2 per cent in the first half of 1944. The South African official series rose in a more marked degree in this period with an increase of 2.4 per cent between December, 1943 and May, 1944.

Production of Coal and Coke in July

Canadian mines produced a total of 1,170,696 tons of coal in July compared with 1,387,993 in the corresponding month of last year, a reduction of 15.6 per cent. Output during the first seven months of the current year aggregated 9,556,953 tons compared with 10,285,144 in the similar period of 1943.

Coke production in July was recorded at 322,000 tons compared with 328,000 in June and 308,000 in July of last year. The total for the first seven months of 1944 was 2,363,000 tons compared with 1,878,000 in the like period of 1943, an increase of 25.8 per cent.

Coal imports in July were increased to 3,240,896 tons from the July 1943 total of 3,063,078 tons, while the aggregate for the seven months of this year rose to 14,775,702 tons from 13,011,006 in the similar period of 1943. Exports of coal in July amounted to 100,084 tons, making a total of 622,820 for the seven-month period.

Production of Iron and Steel in July

Pig iron production in Canada in July advanced to 166,004 tons from the July 1943 total of 151,369 tons. Output in July this year included 145,484 tons of basic iron, 9,774 tons of foundry iron and 10,746 tons of malleable iron. During the seven months ending July, pig iron production totalled 1,115,527 tons compared with 1,019,158 in the similar period of 1943.

July production of steel ingots and steel castings decreased to 234,418 tons from last year's July total of 250,508 tons. Output of ingots in July of the current year amounted to 224,774 tons and of castings, 9,644 tons. Production of steel ingots and castings during the seven months ended July amounted to 1,747,001 tons compared with 1,749,661 in the comparable period of last year.

Production of ferro-alloys in July was recorded at 14,508 tons compared with 21,408 in July, 1943, while the total for the seven months ended July was 105,750 tons compared with 133,201 in the like period of 1943.

Contract Diamond Drilling in 1943

Firms reporting to the Dominion Bureau of Statistics as having been actively engaged in contract diamond drilling operations in 1943 totalled 27 compared with 28 in 1942. The footage drilled in the Dominion in 1943 amounted to 2,649,708 compared with 2,960,364 in the preceding year. Of the 1943 total, 53.5 per cent was completed in Ontario, 32.2 per cent in Quebec and 10.8 per cent in British Columbia. The total income received by the industry from contract drilling operations in 1943 amounted to \$3,072,431.

Sugar Refining Industry in Canada in 1943

The production of sugar of all kinds by the sugar refining industry in 1943 amounted to 370,557,020 pounds, an increase of 69,437,805 pounds over the preceding year. The output in 1943 included 741,289,010 pounds made from cane and 129,268,010 pounds from beets. The production of cane sugar increased by 129,236,665 pounds and that of beet sugar decreased by 59,798,860 pounds. Granulated sugar comprised over 36 per cent of the total sugar produced.

The production of beet sugar, which reached an all-time high in 1941 with an output of 215,879,271 pounds, declined to 129,268,010 pounds in 1943. The percentage of beet sugar to the total produced was 23.6 in 1942, the highest since the inception of the annual census in 1917. The percentage in 1943, however, was only 14.6.

Prices of refined sugar at the factory were slightly higher in 1943 than in the preceding year. Sugar of all kinds rose from 5.50 cents per pound to 5.72 cents. Granulated sugar rose from 5.52 to 5.75 cents, yellow sugar from 4.94 to 5.10 cents, while icing sugar rose from 6.23 to 6.40 cents.

Indexes of Wholesale Sales in July

Wholesale trading in July increased four per cent over the dollar value of business transacted in the corresponding month of last year, the unadjusted index number on the base 1935-1939=100 rising to 179.6 from 173.2. Cumulative sales for the first seven months of the current year recorded an increase of 10 per cent over the same period of 1943.

Conforming with the June pattern of trading, British Columbia reported a decline from the 1943 sales position, July sales decreasing by four per cent compared with July, 1943. Increases recorded in the other economic divisions of the country follow: Maritime, one per cent; Quebec, three per cent; Ontario, four per cent; Prairie Provinces, eight per cent.

Indexes of Retail Sales in July

The dollar value of consumer purchasing was practically unchanged in July this year compared with last and was down 16 per cent compared with June. The general index of retail sales on the base, 1935-1939=100, stands at 148.8 for July, 176.5 for June and 147.8 for July, 1943. Sales for the first seven months of 1944 averaged 6.6 per cent above the corresponding period of 1943.

Results for individual trades reveal that July sales for all lines of business were within comparatively narrow limits of the level obtaining in July of last year. Changes in the value of sales, ranging from a decrease of five per cent for radio and electrical stores to an increase of eight per cent for candy stores, jewellery stores and hardware stores were reported. Results on a regional basis for six lines of business for which data are available reveal no marked differences from the Dominion averages.

Production of Asphalt Roofing

Production of asphalt roofing in Canada in July included 238,563 squares of shingles, siding and roofing and 2,780 tons of felts and shoothings, compared with 229,903 squares of the former and 2,968 tons of the latter in the corresponding month of last year.

Stocks of United States Grain in Canada

Stocks of United States grain in Canada on August 31 amounted to 1,322,940 bushels compared with 325,571 on the corresponding date of last year. Stocks this year included 630,888 bushels of wheat, 432,415 bushels of corn and 259,645 bushels of soybeans.

Car Loadings on Canadian Railways

Car loadings on Canadian railways during the week ended August 26 increased to 72,595 cars from 69,513 in the previous week and 69,849 in the corresponding week of last year. Loadings in the eastern division increased from 45,252 cars in 1943 to 47,339 cars and in the western division from 24,597 to 25,556 cars.

Grain increased from 8,432 to 10,347 cars, both divisions showing advances. Merchandise loadings rose from 14,797 to 15,314 cars and miscellaneous from 8,827 to 9,368 cars. Coal decreased from 6,137 to 5,320 cars, petroleum oils from 3,243 to 3,036 cars, and other commodities showed minor changes.

Reports Issued During the Week

1. Car Loadings on Canadian Railways (10 cents).
 2. Contract Diamond Drilling Industry, 1943 (10 cents).
 3. Production of Iron and Steel, July (10 cents).
 4. Age by Sex, Conjugal Condition, Etc., British Columbia, 1941 (10 cents).
 5. Fruit and Vegetable Crop Report (10 cents).
 6. Canadian Grain Statistics (10 cents).
 7. Monthly Indexes of Wholesale Sales, July (10 cents).
 8. Monthly Indexes of Retail Sales, July (10 cents).
 9. Production of Coal and Coke, July (10 cents).
 10. Advance Preliminary Statement of Stocks of Butter, Cheese and Eggs in Principal Cities of Canada, September 1 (10 cents).
 11. Domestic Sales of Asphalt Roofing, July (10 cents).
 12. Production of Asphalt Roofing, July (10 cents).
 13. The Sugar Industry in Canada, 1943 (25 cents).
 14. Price Movements, August (10 cents).
 15. Telegraphic Crop Report, Prairie Provinces (10 cents).
 16. World Price Movements, First Half, 1944 (10 cents).
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