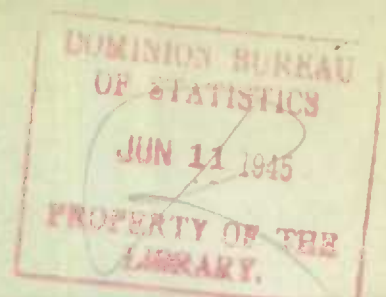


WEEKLY BULLETIN

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Economic Conditions During Four Months of 1945

A majority of the factors indicating the trend of economic activity recorded increases in the first four months of 1945 over the same period of last year. Distribution of commodities through retail outlets recorded a gain of more than 11 per cent, the index rising from 145 to 161.6. The increase in the sale of commodities at the wholesale level also recorded an advance, the index rising from 173 to 187.8, a gain of 8.5 per cent.

Although construction contracts awarded in the first four months were at a somewhat lower position than in the same period of 1944, the index of employment indicated expansion in actual operations. Contracts awarded receded from \$33,700,000 to \$27,600,000, a decline of slightly more than six per cent. Building permits in 58 municipalities rose from \$23,900,000 last year to \$30,000,000 in the period under review, a gain of 25.8 per cent. The index of employment in construction generally rose from 90.9 to 96.1.

Further increase was shown in the export trade over the high level of the early months of 1944. The total was \$1,099,000,000 compared with \$1,052,000,000, an increase of 4.5 per cent. Imports, on the other hand, showed a decline of eight per cent, resulting in a considerable increase in the active balance of trade. Taking the net export of non-monetary gold into consideration, it is estimated that the active balance of trade rose about 16 per cent.

There is evidence that recession has occurred in the payment of salaries and wages, notwithstanding the higher level of rates during the first four months of the present year. During the first quarter, per capita weekly earnings recorded increases month by month over the same period of 1944. The trend was somewhat reversed in April when the rate showed reaction both from the preceding month and from the same month of 1944. The general index of employment, based on the first four months, receded from 182.8 to 178.6, a decline of 2.3 per cent. The somewhat higher level of rates was insufficient to offset the recession in employment. Aggregate weekly payrolls for the period under review consequently showed a slight recession from the same period of last year.

Dividend payments according to an unofficial computation rose from \$82,600,000 in the first four months of last year to \$88,200,000, a gain of more than three per cent. The reported payments of interest on the Dominion government debt rose considerably in the early part of the present year, the advance having been occasioned by heavy payments in January.

Commodity production in the first four months of 1945 was at a somewhat lower level than in the same period of the preceding year, the index of the physical volume of business having been about 7.5 per cent less. The index, however, showed recovery in March and April but the downward trend of 1944 accounts for the recession of 7.5 per cent from the high level of the early part of last year.

Statistics bearing on agricultural marketings indicate that the income originating in the industry was at a considerably lower level during the first four months of this year. Betterment was indicated in April over the preceding months when marketings were somewhat depressed. Grain marketings showed a contra-seasonal gain in April while the index of livestock sales on stockyards receded to a considerably lower point compared with the preceding month.

Newsprint production showed a gain of 4.4 per cent in this comparison, the total this year having been 1,013,632 tons. A considerable increase in the outward flow of planks and boards occurred this year, especially in the last three months. The standing in April was 133,800,000 feet against 100,900,000 in the same month last year. The index of employment in logging operations rose more than 15 per cent. An appreciable increase in the income originating in forestry was indicated for the first four months of 1945.

According to the index, the decline in manufacturing production from the first four months of 1944 was 9.4 per cent. The index of employment receded 5.6 per cent in the same comparison, prices of manufactured goods having been a trifle higher. The national income was \$726,000,000 in April against \$735,000,000 in March and \$731,000,000 in April last year.

Business Operations in April

Productive operations recorded an increase in April over the preceding month, constituting the second consecutive advance. The index of the physical volume of business was 232.2 in April against 225.2 in March, due allowances having been made for seasonal tendencies. The standing was considerably below the level of the same month of last year when the index was 239.5.

The index of grain marketings rose from 128.4 in March to 269.3 in the month under review. The index is based on the deliveries of five classes of grain at country elevators in the Prairie Provinces. The sales of livestock on stockyards receded to a lower level in the month under review, declines having been shown both in cattle and hogs. The index of livestock sales consequently receded from 131.6 in March to 106.8 in April.

The activities of the forestry industry showed recession in the fourth month of the year. The output of newsprint receded from 263,776 tons to 245,429. The exports of planks and boards were 134 million feet against 155 million in March. Export of fishery products rose from \$5,447,000 in March to \$6,006,000. The export of furs, on the other hand, showed a decline, the value having been \$1,945,000 against \$2,527,000.

The index of mineral production rose from 173.5 in March to 183.2. The output of coal was 1,316,000 tons against 1,467,482, but the decline was less than normal for the season. An increase was shown in the output of aluminum for the second consecutive month. The index of gold receipts at the Mint rose from 63 to 70.

The output of manufacturing plants was maintained in April at the level of the preceding month, the index remaining at 271.1. The standing was about 20 points below that of April last year. The index of the output of the flour milling industry was slightly less than in the preceding month. The increase in the release of cigarettes counterbalanced the decline in other classes of tobacco, the index remaining unchanged at 236. Operations of the meat packing industry receded to a lower level, the index dropping from 186 to 171. The gain in the dairy output was much greater than normal for the season. Canned salmon exports were at a much higher level. The index of operations in the textile industry receded from 133.6 to 128.4. Considerable decline was shown in the cotton used by the textile industry. The index of operations in the primary and secondary iron and steel plants showed an increase over the preceding month of more than one point to 513.8. The index of the output of electric power rose more than 10 points to 165.5. The standing in April last year was 153.1.

Aggregate weekly payments, suggestive of the trend in the payment of salaries and wages, were lower in the first week of April than for either March or April last year. Dividend payments receded from \$19,757,000 to \$16,809,000, according to an unofficial computation. Interest payments by the Dominion Government dropped from \$9.3 million in April last year to \$5.2 million in the month under review.

Available information relating to expenditures was mainly constructive in April. Contracts awarded rose from \$19.7 million in March to \$34.3 and a considerable increase was also shown in building permits issued in 58 municipalities. Employment in the construction industry has been at a somewhat higher level during the early part of 1945. Exports were \$318 million in April against \$307 million in the preceding month. The standing in April last year was \$286.7 million, the record for the first four months having been somewhat higher than in the same period of 1944. Owing to a decline in imports, the active balance of trade showed a substantial increase even after taking into account the net exports of non-monetary gold.

The ordinary expenditure of the Dominion Government was somewhat higher in April this year than in the same month of 1944, while marked decline was shown in war and Mutual Aid expenditures.

Cost of Living Index on May 1

The Dominion Bureau of Statistics cost-of-living index, on the base 1935-1939=100, advanced from 118.7 on April 2 to 119.0 on May 1, 1945. Although the responsibility for this increase lay mainly with the food group, rents, clothing, homefurnishings and services, and miscellaneous items also recorded small gains. Fuel and light declined fractionally from 106.7 to 106.6. The food index moved up from 131.0 to 131.7, as higher prices for fresh vegetables and fruits outweighed small declines for dairy products and eggs. The rental index advanced from 112.0 to 112.1. Scattered increases in clothing and homefurnishings produced gains of 0.2 and 0.4 in these group indexes, which moved to 122.0 and 118.9, respectively. Hospital rates and barbers' fees

were mainly responsible for the change in the miscellaneous items section from 109.2 to 109.4.

Merchandise Imports in April

The value of merchandise imported into Canada in April was \$133,827,000 as compared with \$137,487,000 in the corresponding month of last year, a reduction of \$3,660,000. During the first four months of the present year the value was \$508,371,000 as compared with \$553,012,000 in the comparable period of 1944, a decrease of \$44,641,000, or 8.1 per cent.

The United States was the principal source of supply, the valuation of merchandise imported from that country in April amounting to \$102,697,000 as compared with \$114,352,000 in April of last year, and in the four months ended April \$402,651,000 as compared with \$459,680,000 a year ago. April imports from the United Kingdom were valued at \$11,974,000 as compared with \$8,445,000 in April 1944, the total for the four months ended April standing at \$37,392,000 as compared with \$32,006,000.

The following were amongst the leading commodities imported in April, totals for the corresponding month of last year being in brackets: fruits, \$5,128,000 (\$4,145,000); cotton and products, \$7,205,000 (\$7,951,000); rolling mill products, \$5,063,000 (\$3,924,000); farm implements, \$4,491,000 (\$2,707,000); machinery, except agricultural, \$8,052,000 (\$7,696,000); vehicles, \$7,734,000 (\$8,479,000); electrical apparatus, \$4,226,000 (\$5,308,000); coal, \$7,513,000 (\$8,473,000); petroleum products, \$7,389,000 (\$6,562,000); chemicals, \$6,801,000 (\$7,368,000).

Index Numbers of Wholesale Sales in April

Wholesale sales in April increased 13 per cent over the dollar volume of trading realized in the corresponding month of last year, according to reports received from establishments representing many lines of business. The general unadjusted index of sales on the base, 1935-1939=100, stands at 195.5 for April compared with 201.8 for March and 173.0 for April, 1944. Aggregate sales for the first four months of the present year were 11 per cent higher than for the same period of 1944.

While all trades reported an increase in sales over April 1944, gains varied greatly for the different lines. The footwear trade was first from point of view of increased trading, recording an advance of 38 per cent. The automotive equipment trade followed with a 32 per cent gain. Hardware sales advanced 18 per cent; the fruits and vegetables trade reported 16 per cent more business transacted; drug sales were 14 per cent higher and the tobacco and confectionery trade registered a 13 per cent gain. Sales made by wholesale grocers were 10 per cent greater than in 1944, while minor gains of two per cent and one per cent were recorded by the clothing trade and dry goods trade, respectively.

April Employment Situation

In conformity with the trend in 20 of the previous 24 years of the record, industrial employment throughout Canada showed curtailment at the beginning of April. The general decline approximated that reported at April 1 in 1944, but was nevertheless rather below average in extent according to the experience of pre-war years. Most of the recession took place in manufacturing and logging, from which some 7,100 and 12,700 persons, respectively, were released by the co-operating firms. The contraction in manufacturing as a whole was contra-seasonal, although it repeats that indicated a year earlier; there was a moderate falling-off in the production of both durable and non-durable manufactured goods, when the largest losses were in iron and steel and animal foods. On the other hand, heightened activity was noted in lumber and non-ferrous metal products and in communications, transportation, services and trade, the greatest expansion being that of a seasonal character in transportation and trade.

Data were tabulated by the Dominion Bureau of Statistics from 15,189 firms, whose employees numbered 1,803,015 at April 1; compared with 1,816,022 at the beginning of March, this was a reduction of 13,007 persons, or 0.7 per cent. Of the latest aggregate, 1,340,181 were men and boys, and 462,834 were women and girls, the latter constituting 257 per thousand of both sexes. This proportion was somewhat lower than that of 261 per thousand indicated at October 1, 1944, and also at April 1 of last year.

The shrinkage in employment at April 1 this year lowered the crude index number on the base 1926 equals 100, from 178.2 on March 1 to 176.9 at April 1 and 180.5 on April 1, 1944. Since then, there has been a loss of two per cent in employment, accompanied by that of three per cent in the aggregate weekly payrolls, the observance of the Easter holidays had an effect on the latest figures. The percentage decrease in employment between March 1 and April 1 was rather less-than-average according to the experience of past years, so that the seasonally adjusted index number showed an upward movement, advancing from 185.7 at the former date to 187.4.

The weekly payrolls at April 1 of the firms furnishing statistics in the eight leading industries aggregated \$57,694,461 as compared with \$59,580,035 distributed on or about March 1. The decrease, which amounted to 3.2 per cent, resulted from loss of working time during the Easter holidays, as well as from reductions in the personnel. The weekly average earnings of the typical individual in recorded employment fell from \$32.81 in the last return, to \$32.00 at April 1. On April 1 of last year the average was \$32.37. It may be added that in the last two years, Easter did not fall within the pay period for which the earnings were reported at April 1.

Industrial Employment in 1944

The year 1944 was characterized by a greater degree of stability in industrial employment as a whole than has been indicated in any earlier year for which statistics of employment are on record, i.e., since 1920. This situation is an obvious development in view of the stage reached in the progress of the war itself, and in production for military needs, and in consequence of the heavy drains made on the man-power of the Dominion since the outbreak of hostilities. Pre-war experience shows that in general, the trend from the beginning of January to the end of the year is favourable, there normally being a gain of over six per cent in this comparison, while in the period, 1939 - 1943, the seasonally buoyant movements were inflated by wartime demands on industry. As a result, the rise in employment from January 1 to December 1 in these years has been extremely pronounced; in 1944, however, the indexes of employment at those two dates coincided, and were the highest figures in the 12 months.

There were six general increases and an equal number of decreases during 1944, when the variation between the low and the high index numbers was 7.5 points; in 1943, the range had been 12.3 points, while that in 1942 was 21.4 points. The normal variation, according to the experience of the years, 1929 - 1937, used in calculating the factors for seasonal adjustment, amounts to nearly eleven points. In the first quarter of 1944, industrial employment was at a higher level than in the same months of any earlier year; in subsequent months, this superior position was lost, the disparity between the indexes for the same dates in 1943 and 1944 increasing as the year progressed, until at December 1, 1944, the index was lower by 2.5 per cent than at the same date in 1943. The level was also slightly below that at the beginning of December in 1942. The annual index for 1944, however, at 183.0 per cent of the 1926 average, was very little lower than the 1943 mean of 184.1, and was otherwise the highest in the record of 25 years. Increasingly acute shortages of labour during 1944 were reflected in the employment of important numbers of female workers, many of whom were engaged on a part-time basis. The growth of the number of women in recorded employment, however, was not so pronounced as that previously indicated.

During 1944, the Dominion Bureau of Statistics compiled a total of 175,700 returns on employment and payrolls in the eight leading industries as follows: manufacturing, logging, mining, transportation, communications, construction, services and trade. The average number of reports received monthly was 14,641; the staffs of the co-operating employers averaged 1,850,851, ranging from 1,796,340 at May 1 to 1,887,752 at the beginning of December. In 1943, the 13,756 establishments furnishing data had reported a monthly average of 1,848,534, varying from a minimum of 1,788,320 at the first of May, to a maximum of 1,916,588 at December 1. Increased coverage of industry as a result of growth in the number of respondents accounts for the apparently higher number in recorded employment in 1944, a factor for which adjustment is made in the index. Standing at 183.0, this was 0.6 per cent below the 1943 mean. The latest average, however, was 5.4 per cent above that of 173.7 in 1942, and exceeded by 60.7 per cent the 1939 annual index of 113.9. The pre-war high figure was that of 119.0 in 1929.

Although there was in 1944 a minor decline from 1943 in the general index of employment, a moderate increase in the same comparison was shown in the reported payrolls. In the eight leading industries the amounts distributed in one week in each month averaged \$58,917,047, indicating the disbursement of some \$3,063,686,000 during the year by the larger employers in the eight leading industries. The sums reported represented an average earned income of \$31.84 per week for the typical individual in recorded employment, as compared with \$30.78 in 1943, \$28.56 in 1942, and \$26.17 in the seven months of 1941 for which statistics are available.

In addition to the data for the eight leading industries, information was furnished by 800 financial institutions and branches, with staffs averaging 65,329 per month. The weekly payrolls of these persons were stated as \$2,116,334, a mean of \$32.35 per employee during 1944, as compared with \$31.19 in 1943 and \$30.20 in 1942. When these figures are included with those for the eight leading industries, the total labour force of whose employment and weekly earnings there is current record aggregated 1,916,180.

Thus, the weekly payrolls in the nine industrial divisions in 1944 averaged \$61,033,-381, representing an estimated annual payroll of approximately \$3,173,785,800 disbursed in salaries and wages by the co-operating establishments. The per capita weekly figure in the nine industries in 1944 was \$31.85, as compared with \$30.79 in 1943 and \$28.61 in 1942.

World Wheat Situation

The government's action in placing a firm limitation upon wheat deliveries in 1945-46, together with a cool backward spring, has served to increase the planting of coarse grain and flax in Canada while decreasing the acreage to be devoted to wheat. The seeding of wheat has been virtually completed in the Prairie Provinces and warm weather is needed everywhere. Central Alberta and southern Saskatchewan need rain. Although most of the crop was late in being seeded, this factor does not rule out the possibility of an excellent crop. Weather conditions during June and July will largely determine the outcome.

The Canadian transportation authorities have been making plans to move out a record volume of Canadian grain for export during the next seven months. It is hoped it may be possible to place approximately 250 million bushels of wheat in export position during this period. Canadian wheat is required for liberated Europe whether distributed by the army, UNRRA, or purchased by those countries which are handling their own supplies. In order to meet these requirements it is estimated that it will be necessary to move from 28 to 40 million bushels of grain a month through Canadian ports and from 10 to 12 million bushels a month through United States ports.

The magnitude of this task is impressive as clearances through Canadian ports during the eight months from April to November 1944 averaged 8.9 million bushels and did not exceed 10.8 million bushels during any one month. Clearances of Canadian wheat through American ports averaged 3.8 million bushels for this period and during October reached a high of 6.1 million bushels. During the 1944 season of navigation, however, the United States imported from 8 to 25 million bushels of wheat per month and much of the transportation capacity which this movement required will now be available for the movement of wheat to seaboard ports for overseas export. In addition to the clearance of wheat an export movement of Canadian flour of between five and six million bushels per month, wheat equivalent, is expected to continue.

Crop prospects in the United States continue to be very favourable with winter wheat headed as far north as Kansas, although probable yields have been reduced in recent weeks by excessive moisture in some areas, drought in others and the occurrence of rust in the south-west. The condition of the crop at May 1 was such as to indicate a prospective yield of 835 million bushels, which, although 27 million bushels lower than the estimate of a month earlier, would still be a record. The planting of spring wheat is now virtually completed. Barring exceptionally unfavourable conditions between now and harvest time another billion bushel crop seems likely. The addition of a billion bushels of wheat to the prospective 350 million bushel carry-over at July 1 this year would result in an even larger stock figure at July 1, 1946, despite large scale exports and continued relative heavy domestic disappearance.

Wheat seeding is now general in Argentina under relatively favourable conditions and government spokesmen are reported to be urging the seeding of a larger acreage. Critical food shortages now existing in Europe are considered such as to warrant maximum production. The latest reports suggest a probable increase of 10 per cent over the 15.4 million acres which were seeded in 1944. The realization of average yields on this increased acreage would result in a crop of about 205 million bushels, of which at least 80 million bushels would be available for export. As Argentina's exportable wheat surplus at May 1 is estimated at 174 million bushels and exports are averaging about 10 million bushels per month, a fair carry-over of old wheat at November 30 appears likely.

The government of Argentina has announced that it will continue to control the marketing of grains. A plan has been announced whereby the government will buy the crops of wheat, corn and flaxseed at a level sufficiently high to cover costs of production and permit a profit to the producer. Any surpluses derived from the sale of these grains in the export market will be made available for the betterment of the primary producer. Such forms of assistance as relief in cases of crop failure, advances

to farmers for capital improvements and development of more economic methods of marketing are contemplated.

Moisture conditions in the wheat growing sections of Australia have been improved by recent rains, but some areas are still very dry and farmers are looking for rain to permit the beginning of seeding operations. An acreage objective of 11.5 million acres has been established which, if attained and average yields are realized, would result in a crop of about 138 million bushels. The feeding of wheat to live stock is being limited in order to spread the use of present stocks fairly evenly over the remainder of the year and any year-end carry-over will of necessity be small. Unless sufficient supplies of animal feedstuffs are available in 1945-46 to permit Australia to reduce her domestic use of wheat below the 90 million bushel level of the last two years, her exportable surplus from the crop now being seeded will be small.

Stocks and Marketings of Wheat and Coarse Grains

Stocks of Canadian wheat in store or in transit in North America at midnight on May 31 totalled 282,573,810 bushels as compared with 278,510,467 on the corresponding date of last year. Stocks on the latest date included 263,984,116 bushels in Canadian positions and 18,594,394 bushels in United States positions.

Deliveries of wheat from farms in the Prairie Provinces during the week ending May 31 totalled 3,951,764 bushels as compared with 2,210,532 in the preceding week. During the elapsed portion of the present crop year 303,256,018 bushels of wheat were marketed in western Canada as compared with 236,171,337 in the corresponding period of 1943-44.

The following quantities of coarse grains were also delivered from farms in the Prairie Provinces during the week ending May 31, totals for the preceding week being in brackets: oats, 2,604,279 (1,748,546) bushels; barley, 423,706 (281,260); rye, 32,181 (26,182); flaxseed, 18,590 (8,866).

Interprovincial Migration in Canada

The extent of interprovincial migration of the population of Canada during the decade 1931 to 1941 has been determined by the Dominion Bureau of Statistics, the tabulation being based on answers to special questions dealing with previous place of residence incorporated in the 1941 Census. It is, of course, impossible to conjecture how the Post War development will affect the currents of population movement, nor can it be foretold whether the direction will be similar to that which characterized the war years, when the movement was mainly from the thinly settled sections to the densely settled parts, and in particular to the metropolitan areas of the larger cities. Knowledge of the past 20 years indicates that a movement of the population from the farm to the cities is characteristic of eras of economic prosperity, and from the cities to the farms when economic activity is lower.

During the inter-censal decade the greatest exodus of the population of the individual provinces was recorded by Saskatchewan, 188,204 persons leaving the province, while in-migrants totalled 30,659, leaving a net decrease in the population through migration of 157,545. The net decrease in the population of Manitoba through migration was 48,478; Alberta 41,841; New Brunswick 10,177; Prince Edward Island 2,672; Quebec 1,584. On the other hand, the net increase through migration in the population of the Province of British Columbia was 82,498, Ontario 77,484, and of Nova Scotia, 7,848.

The figures which follow show the number of in-migrants to the provinces during the inter-censal decade, 1931-41, with the totals of out-migrants in brackets: Prince Edward Island, 3,074 (5,746); Nova Scotia, 27,646 (19,798); New Brunswick, 16,551 (26,728); Quebec, 38,369 (89,953); Ontario, 200,993 (123,509); Manitoba, 47,571 (96,049); Saskatchewan, 30,659 (188,204); Alberta, 53,934 (95,775); British Columbia, 138,008 (55,510).

Stocks of Food Commodities in Cold Storage

Creamery butter on hand in nine of the principal cities of Canada as at the opening of business on June 1 totalled 10,212,048 pounds, according to preliminary figures, as compared with 6,072,367 on May 1 and 7,557,264 on the corresponding date of last year. Cheese holdings were 21,243,738 pounds as compared with 12,869,839 on May 1 and 17,191,116 on June 1, 1944. Shell eggs on hand on June 1 amounted to 9,002,663 dozen. Last year the

quantity was 8,052,021 dozen and a month ago, 8,328,445 dozen. The holdings of frozen eggs aggregated 11,720,833 pounds, a little more than half of last year's stocks which amounted to 22,091,348 pounds. On May 1, the stocks of frozen eggs totalled 6,723,242 pounds.

Trends in Food Distribution in April

Wholesale sales of food products in April exceeded by a considerable margin the volume recorded in the corresponding month of last year. Statements received by the Dominion Bureau of Statistics from 74 of the larger wholesale grocery houses and 46 fruit and vegetable wholesalers revealed increases of 10 and 13 per cent for the respective trades.

Sales in April of 935 chain store units operating in the food retailing field were on a par with the sales of 954 units in April, 1944. Average sales per store in April this year were \$15,965 as compared with \$15,638 a year ago. Sales reported by 1,213 independent retail food stores in April averaged one per cent higher than in April, 1944.

Index Numbers of Retail Sales in April

Sales in Canadian retail stores in April were practically unchanged from the dollar value of sales in the corresponding month of last year, and were 10 per cent lower than in March when pre-Easter buying and unseasonably warm weather combined to effect a remarkably high level of trading. The unadjusted index of sales, on the base 1935-1939=100, stood at 174.4 for April this year, 194.2 for March, and 175.3 for April, 1944. Sales during the first four months of this year averaged eight per cent above the similar period of 1944, and were 46 per cent higher than in the same four months of 1941.

Furniture stores and hardware stores reported a substantially higher volume of business for April this year than last while a number of other trades experienced minor gains in the April comparison. Sharp declines occurred in the trades which comprise the clothing group. This was due in part to the fact that these trades were most affected by pre-Easter buying and early spring conditions prevailing in March and thus benefited most from the heavy consumer demand which existed in that month. Department store sales showed a fractional gain between April of the two years.

Revenues and Expenses of Railways in March

Canadian railways earned \$64,689,022 in March as compared with \$67,123,259 in the corresponding month of last year. Freight revenues declined by \$2,815,707 or 5.6 per cent, but passenger revenues increased by \$275,498 or 2.9 per cent, and express revenues by \$204,358 or 9.4 per cent. Operating expenses increased from \$50,728,086 to \$51,725,556, reducing the operating income from \$11,767,706 to \$9,237,782. For the first three months of 1945 operating revenues declined from \$135,982,556 in 1944 to \$179,189,494; operating expenses increased from \$146,137,114 to \$151,443,598, and the operating income declined from \$27,547,981 to \$18,301,499.

Operating revenues of Canadian lines of the Canadian National Railway declined to \$32,403,100 in March from \$33,492,700 in 1944. Operating expenses decreased from \$26,386,168 to \$25,786,894, and the operating income fell from \$6,690,819 to \$6,040,830. Operating revenues of the Canadian Pacific Railway Company declined to \$26,425,929 in March from \$27,200,480 in March of last year, and with operating expenses increasing by \$1,542,601 the operating income decreased from \$3,883,868 to \$2,603,897.

Car Loadings on Canadian Railways

Car loadings on Canadian railways for the week ended May 26 amounted to 70,250 cars as compared with 73,155 cars for the preceding week and 67,952 cars for the corresponding week of last year. The non-statutory holiday on May 24th was undoubtedly the reason for the decline from the total for the preceding weeks. In the eastern division, loadings increased from 42,721 cars in 1944 to 44,728, and in the western division from 25,231 cars to 25,522.

Total grain loadings increased from 11,038 cars in 1944 to 12,983 cars, automobiles, trucks and parts from 1,338 cars to 1,653, pulpwood from 1,950 cars to 3,336, and wood pulp and paper from 2,964 cars to 3,131. Loadings of live stock declined from 2,453 cars to 1,806, coal from 4,750 cars to 4,144, and ores and concentrates from 4,237 cars to 3,851.

Births, Deaths and Marriages in April

Births registered in cities, towns and villages of Canada having a population of 10,000 and over numbered 11,817 in April, deaths 4,815 and marriages 3,335 as compared with 11,370 births, 4,976 deaths and 3,925 marriages in April last year, showing an increase of four per cent in births and decreases of three per cent in deaths and two per cent in marriages.

Petroleum Refining Industry in 1943

Thirty-five petroleum refineries operated in Canada during 1943 with a capacity of 242,215 barrels of crude oil per day. During the year, 1,746,982,235 gallons of imported crude oil and 337,070,674 gallons of crude oil and absorption gasoline from Canadian wells, or a total of 2,084,052,909 gallons was put through Canadian refineries, this amounting to about 66 per cent of the rated capacity. Of the total crude input, about 69 per cent was imported from the United States and nearly 15 per cent from other countries, while about 16 per cent came from Canadian wells. The total cost at the refineries of all crude oil and naphtha charged to stills during the year was \$127,907,890.

Refinery production of gasoline in 1943 amounted to 869,238,237 gallons, and in addition the refineries used for blending about 21,647,290 gallons of imported casinghead gasoline which is not included in the Canadian production figures. The gallonage of gasoline made in 1943 was 16 per cent over 1942, which, in turn, was 12 per cent under 1941. The refinery selling value of the gasoline made during the year was \$110,043,999. Stocks of gasoline held by the refineries on December 31 included 81,654,646 gallons of straight run or cracked gasoline and 1,036,670 gallons of imported casinghead gasoline. In 1943 there was an output of 16,319,590 gallons of natural gasoline from absorption plants in Alberta. This was practically all sold to refineries and is included with the gallonage charged to stills, and the refined gasoline made therefrom is included in the refinery output figures.

Imports of gasoline, including casinghead, amounted to 97,504,792 gallons during 1943, which, added to the production of 869,238,237 gallons less the increase in producers', distributors', and consumers' stocks of 27,819,974 gallons and less the exports of 21,494,799 gallons, made an apparent Canadian consumption of 917,478,256 gallons. Actual sales as reported to the Bureau on a monthly basis, amounted to 903,592,163 gallons.

Production of fuel and gas oils, excluding any made and used for cracking purposes, totalled 893,649,905 gallons, of which 809,950,476 gallons were made for sale and 83,699,429 gallons for use as fuel in the producing plant. Imports amounted to 53,570,321 gallons and exports to 54,687,171 gallons. Stocks of fuel oil and distillate at the end of the year stood at 275,469,561 gallons, or about 43,669,103 gallons more than in 1942. Output of tractor and engine distillate was 39,433,111 gallons in 1943, imports amounted to 596,503 gallons, and producers' stocks declined 2,217,713 gallons. The apparent consumption of fuel oils and distillate in Canada, as calculated from the above figures, amounted to 891,111,279 gallons.

Drug Retailing in Canada in 1941

Retail sales of drugs and drug sundries through all types of retail outlets amounted to \$56,206,300 in 1941. This total consists of prescriptions to the value of \$11,732,000, pharmaceuticals and patent medicines valued at \$36,323,900 and drug sundries valued at \$8,150,400. Prescriptions are sold through drug stores or through the drug departments of department stores. The census sales figure of \$11,732,000 does not include the sales of medicines through physician's office dispensaries.

About 90 per cent of the sales of pharmaceuticals and patent medicines were made through drug stores. The other 10 per cent was sold by department stores, by stores specializing in the sale of patent medicines, perfumes, extracts, etc. and by variety stores. Drug sundries, consisting of rubber goods, sick room supplies, etc., were sold by drug stores to the extent of 78 per cent of the total. Department stores accounted for 17 per cent, while variety stores and general merchandise stores accounted for the remaining five per cent.

Crop Conditions in Argentina

The official crop report of the Argentine Ministry of Agriculture, which has recently been issued, states that the planting of wheat has been started in the western part of the province of Buenos Aires and in the eastern part of the Pampa territory. The planting of other cereals for the dual purpose of pasture and grain production has also become general. Up to the third week of April the field work was rendered difficult by lack of rain, but afterwards general precipitation moistened the soil and facilitated planting operations. The harvesting of maize and rice is proceeding normally, and the crops of alfalfa and sorghos look well. The condition of pastures is good.

Production of Asphalt Roofing in April

Production of asphalt roofing in April included 294,047 squares of shingles, siding and roofing and 3,033 tons of felts and sheathing, as compared with 203,107 squares of the former and 2,922 tons of the latter in the corresponding month of last year.

Facts of Interest from Bureau Records

The making of barrels is divided into two divisions - slack and tight cooperage. Slack cooperage, or barrels made with comparatively loose seams, for the shipping of dry products such as lime, potatoes, apples, dry fish, flour, cereals, nails and other products which do not require a water-tight container, is probably the most important. Tight cooperage includes the manufacture of water-tight barrels only. These are mostly used for containing liquids, such as syrup, cider, vinegar and oil. These are also used for pork and fish packed in salt or brine. Elm, poplar, maple, spruce, beech, ash, basswood, birch and pine are a few of the woods used in the making of barrel staves. The gross value of products manufactured by firms included in the cooperage industry of Canada in 1942 was \$4,103,000 as compared with \$2,197,000 in 1939.

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Canadian production of chromite is relatively small and is far short of domestic requirements. The world production just prior to the war was about 1,300,000 tons. Russia, Turkey and Southern Rhodesia were each producing 200,000 tons or more a year, while South Africa, the Philippines, Cuba, New Caledonia, Yugoslavia, Greece and India were each producing 50,000 tons or more. When it was evident that shipping difficulties might impede the imports of chromite into Canada, steps were taken to encourage production from the known deposits in Quebec. Chromite is used in the manufacture of refractory brick, as ferro-chrome in the manufacture of certain ferrous alloys, and in the metallic form in certain non-ferrous alloys. Production in Canada rose from 335 tons in 1940 to 27,720 tons in 1944.

Reports Issued During the Week

1. Grain Situation in Argentina (10 cents).
2. Canadian Grain Statistics - Weekly (10 cents).
3. Economic Conditions in Canada During First Four Months of 1945 (10 cents).
4. Current Trends in Food Distribution, April (10 cents).
5. The Petroleum Products Industry, 1943 (50 cents).
6. Car Loadings on Canadian Railways - Weekly (10 cents).
7. Operating Revenues, Expenses and Statistics of Railways, March (10 cents).
8. Production of Asphalt Roofing, April (10 cents).
9. Sales of Asphalt Roofing, April (10 cents).
10. Annual Review of Employment and Payrolls, 1944 (25 cents).
11. Monthly Review of the Wheat Situation (10 cents).
12. Price Movements, May, 1945 (10 cents).
13. Imports by Principal Countries, April (10 cents).
14. Summary of Canada's Imports, April (10 cents).
15. Registration of Births, Deaths and Marriages, April (10 cents).
16. Monthly Indexes of Retail Sales, April (10 cents).
17. Interprovincial Migration in Canada, 1931-1941 (10 cents).
18. Drug Retailing in Canada, 1941 (25 cents).
19. The Aircraft Industry, 1943 (15 cents).
20. Indexes of Wholesale Sales, April (10 cents).
21. Employment Situation at Beginning of April, 1945 (10 cents).
22. Advance Preliminary Statement of Stocks of Butter, Cheese and Eggs in Nine of the Principal Cities of Canada, June 1 (10 cents).



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