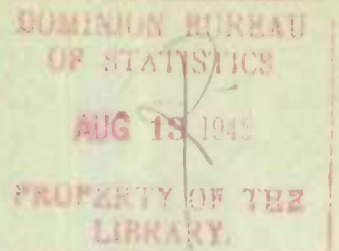


WEEKLY BULLETIN

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Condition of Field Crops of Canada

The condition of the wheat and principal coarse grain crops deteriorated during July this year for the country as a whole. The condition of spring wheat, based on weather factors, improved in Manitoba and Alberta during the month but lost ground in Saskatchewan. The improvement in Alberta is chiefly attributable to the very backward condition of these crops at June 30, but the average condition for the province is still poorer than in Saskatchewan. The condition of oats and barley, expressed as a percentage of the long-time average yield per acre, improved in Ontario, held constant in Manitoba, and deteriorated sharply in both Saskatchewan and Alberta. Spring rye suffered a setback in all three provinces during the month.

The condition of spring wheat and coarse grains improved in all five eastern provinces during July. Flaxseed slipped badly during the month owing to a marked recession in Alberta and Saskatchewan, although no diminution in yield prospects occurred on the small acreage in Ontario. The grain corn crop improved slightly in the principal producing area of Ontario, although it failed to hold its own on the relatively small acreage in Manitoba.

The Ontario winter wheat crop has made excellent progress, and the first appraisal places the outturn at 20,777,000 bushels as compared with 20,908,000 bushels in 1944. The acreage remaining for harvest this year is 679,000 acres, a slight increase over the 668,000 acres a year ago, while the yield per acre is estimated at 30.6 bushels as compared with 31.3 bushels in 1944. The record outturn for this crop in recent years is the 23.4 bushels which were harvested in 1942.

Fall rye production in the four provinces growing this crop is estimated at 4,274,000 bushels as compared with 5,628,000 bushels last season. Although the province of Saskatchewan usually produces nearly half of the fall rye crop, its output this year is only slightly greater than that of either Alberta or Ontario. The yield per acre for this crop is 13.7 bushels as compared with 13.5 bushels in 1944. The decline in production is attributable to a smaller seeded acreage.

With the exception of such forage crops as hay and clover and pasture, together with sugar beets, the condition of field crops at the end of July 1945 is decidedly poorer than at July 31 a year ago. This deterioration is most marked in the case of all grains in Alberta and Saskatchewan, although less pronounced in Manitoba and Ontario. Crop conditions, generally, in New Brunswick and Quebec do not compare unfavourably with those prevailing at July 31, 1944, although crops in Nova Scotia and Prince Edward Island do not measure up to those of a year ago. Although conditions in British Columbia are not as good as those of last year for most crops, the margin between the two years is small.

Forage crops, generally, are in good condition this year, especially in eastern Canada, although drought has taken its toll in Saskatchewan and Alberta. Sugar beet prospects are better than those of 1944 and this improvement is most marked in Manitoba. Potato and turnip crops are slightly below those of last year, largely as a result of the deterioration in Ontario and the Prairie Provinces. The condition of dry peas and beans is poorer than in 1944 as these crops were adversely affected by the late spring.

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Visible Stocks of Canadian Wheat

Stocks of Canadian wheat in store or in transit in North America on August 2 amounted to 222,010,122 bushels as compared with 297,931,963 on the corresponding date of last year, a reduction of 75,921,841 bushels. Stocks this year included 206,959,597 bushels in Canadian positions and 15,050,525 bushels in United States positions.

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Production of Butter and Cheese in July

Creamery butter production in Canada in July was recorded at 42,445,303 pounds as compared with 41,446,100 in the corresponding month of last year, an advance of 2.4 per cent. For the first seven months of the current year the amount produced was 175,763,061 pounds as compared with 177,166,534 in the same period of 1944, a minor decrease of 0.8 per cent. All sections of the country with the exception of the three Prairie Provinces produced more butter in July and in the cumulative period than in 1944.



Cheddar cheese production in July amounted to 30,126,423 pounds as compared with 28,402,777 in the corresponding month of 1944, an increase of 6.1 per cent, while the total for the first seven months of this year aggregated 101,576,639 pounds as compared with 95,746,100 pounds in the similar period of the preceding year, an advance of 6.1 per cent.

#### Business Conditions in June

A moderate increase was shown in the index of the physical volume of business in June over the preceding month, the advance having been from 218.6 to 219.5. The increase was of moderate proportions compared with the reaction of the preceding month. A downward trend has been shown since the early months of 1944 when a historical maximum was reached. A contraseasonal decline was shown in the index of industrial employment at the beginning of the month. Wholesale prices recorded a minor advance, but a large measure of stability in the general level has been displayed since the later months of 1943.

The advance in the index of the physical volume of business was occasioned by increases in the new business obtained by the construction industry and the higher level of commodity distribution. Declines were shown in the indexes of mineral production, manufacturing and the output of electric power. Construction contracts awarded were \$58.9 million in June compared with \$38.3 million in the preceding month. The index of building permits recorded an increase after seasonal adjustment.

The index of wholesale sales rose nearly five points in the latest month for which statistics are available. Imports in June were \$146.5 million against \$143.8 million in May, while exports advanced from \$318.7 million to \$327.1 millions. The net result was that the distribution index advanced about six points to 134.9.

#### Man-Hours and Hourly Earnings as at June 1

In manufacturing as a whole, there was a further decline in the number of wage-earners employed at hourly rates accompanied by reductions in the aggregate and average hours worked and in the wages paid at June 1, as compared with May 1, according to the latest statistics of man-hours and hourly earnings tabulated by the Dominion Bureau of Statistics. The observance of Victoria Day as a holiday in certain establishments throughout the country is partly responsible for the decreases in the average hours and the average earnings. The 6,094 co-operating manufacturers reported a total of 829,216 wage-earners employed at hourly rates at the date under review; these persons had worked an aggregate of 36,756,120 hours in the last week in May, when their earnings had amounted to \$25,823,318. The 840,075 hourly-rated employees on the staffs of the same firms at May 1 had worked a total of 38,188,462 man-hours in the week preceding, for which they had received the sum of \$26,908,221 in wages. The decline at June 1 as compared with May 1 was 1.3 per cent in the number of wage-earners, 3.8 per cent in man-hours, and four per cent in the wages of hourly-rated employees.

The latest average of hours worked in manufacturing, standing at 44.3 per week, was lower than in any other period in the eight months of the record, with the exception of January 1 and April 1, when the observance of the year-end and the Easter holidays, respectively, had seriously affected the situation. As already stated, loss of working time on Victoria Day - observed as a holiday in some centres and establishments - was largely responsible for the relatively low average at the date under review. Apart from this important factor, however, curtailment in overtime was reported by a number of employers.

The hourly earnings of persons employed in the durable goods industries at June 1 averaged 77.5 cents per hour, as compared with 78.1 cents per hour at May 1. These averages were considerably higher than those of 70.3 and 70.5 cents per hour at May 1 and June 1, respectively, in manufacturing as a whole. Within the former category, the highest hourly rates at June 1 were indicated as usual, in the metal-using industries, in which the proportions of male workers are high.

In the non-durable manufactured goods, the average hourly rate at the latest date was 61.4 cents, being slightly higher than that of 60.9 cents at May 1 and also at April 1. These figures in each case were below the general average in manufacturing as a whole, partly due to the employment of unusually high proportions of female labour, and consequently of relatively young persons.



There was a small fractional increase in the average hourly rate in mining, which rose from 83.9 cents at May 1 to 84.1 cents at June 1; the advance took place mainly in the mining of metallic ores. In building, there was a moderate reduction in the hourly rate, but a small increase was noted in highway construction. Little change, on the whole, was shown in the service division.

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#### Indexes of Retail Sales in June

The dollar volume of retail sales in Canada increased 10 per cent in June of this year over last and was eight per cent greater than in May 1945, according to reports received by the Dominion Bureau of Statistics from a sample number of firms representing 14 trades. June stands higher in sales volume than any other month of the year to date, the unadjusted index, on the base 1935-1939=100, moving to 196.3 from 182.0 for May, and 178.1 for June, 1944. Sales in the first half of this year were seven per cent above those for the same period in 1944.

Purchases by service personnel returning from overseas, added to current high level expenditures of civilian consumers, brought about large increases in sales of apparel and gift merchandise. There was a strong demand for footwear and sales of shoe stores increased 23 per cent over June of last year. Family clothing stores and women's apparel shops reported gains of 15 and 14 per cent. Personal clothing requirements of returned men do not feature large in June sales of men's specialty shops which were up 12 per cent over June a year ago. A marked upward trend in sales of furriers has been attributed to heavy gift demand by returned men. Sales of retail fur shops were 28 per cent greater in June of this year than last. Jewellery stores, benefiting from the removal of restrictions affecting styles and manufacture some months ago, have been able to secure a more diversified range of merchandise. This factor, combined with continued heavy gift demand, led to a gain of 17 per cent in sales for this trade over June, 1944.

Furniture and hardware stores, under the impetus of an improved supply situation which began several months ago, continue to record sizeable gains in line with those shown for earlier months of this year. June increases amounted to 14 per cent for furniture stores and 12 per cent for hardware dealers. The four per cent increase in sales of radio and electrical stores may be attributed to the increased flow of small appliances to retail outlets, rather than to distribution of heavier gas and electrical household appliances. Although many of the restrictions imposed upon this type of merchandise were removed some time ago, output is delayed owing to the pre-occupation of manufacturers with war contracts and the difficulty of securing materials and labour. Food store sales were up nine per cent over June a year ago.

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#### June Indexes of Wholesale Sales

Sales of wholesale merchants were nine per cent higher in dollar volume in June of this year than last, according to statements received from wholesale establishments representing nine different lines of trading. For the first six months of the current year, sales averaged nine per cent greater than in the similar period of 1944. The composite index of sales for June, on the base 1935-1939=100, stands at 207.5 as compared with 205.7 for May and at 190.0 for June, 1944.

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#### Trends in Food Sales in June

Sales of wholesale grocery merchants in June were maintained on a par with May and were six per cent higher than the volume of business transacted in June, 1944. Sales in June of 938 chain store units in the food retailing field were eight per cent higher than sales of 965 units operated in June a year ago, while a similar advance was recorded by 1,226 independent retail food stores.

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#### July Cost-of-Living Index

The Dominion Bureau of Statistics cost-of-living index number, on the base 1935-1939=100, continued upward from 119.6 on June 1 to 120.3 on July 3, 1945, for a wartime rise of 19.3 per cent. Further advances in fresh vegetables accounted for most of the increase over June 1, with the food index mounting from 133.4 to 135.6. Eggs and a few meats also showed gains, although oranges and raisins averaged somewhat lower. The clothing index moved fractionally from 122.1 to 122.2, and homefurnishings and services increased from 118.9 to 119.2. The fuel and light index recorded the only group decline from 106.6 to 106.5. Rentals remained at 112.1, and miscellaneous items at 109.4.

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### Commercial Failures in Second Quarter of 1945

Commercial failures dropped to a low level in the second quarter of the present year. The total number receded to 34, a lower point than in any year since 1922 when the statistics were first compiled by the Dominion Bureau of Statistics. This compares with 61 in the same period of 1944, and with 346 in 1939. The same favourable trend was shown in the first half of the present year, when the total was 86 as compared with 137 in the same period of 1944. Failures numbered 1,996 in the first half of 1923, the maximum for the period for which statistics are available.

The liabilities of failing concerns were also at a lower point in the present year than at any other time since 1923. Liabilities in the second quarter were about \$209,000 as compared with \$585,000 in the same period of last year. The total for the first six months was only \$1,202,856 against \$2,621,000 in the same period of 1944. Failures in trade declined from 10 in the second quarter of 1944 to seven in the second quarter of 1945, and in manufacturing there was a decline from nine to six.

### Silver Production in June

Silver production in Canada was reduced in June, the total being 1,099,541 ounces as compared with 1,198,327 in the preceding month and 1,160,245 in the corresponding month of last year. During the first six months of the current year, production amounted to 6,723,106 ounces as compared with 7,265,326 in the corresponding period of 1944. Quotations for silver on the New York market in June averaged 49.23 cents per fine ounce. Based on this price, the value of the June 1945 output was \$541,304.

### Production of Lead in June

Production of unrefined lead in Canada in June amounted to 25,175,850 pounds as compared with 25,555,454 in the preceding month and 19,744,120 in June, 1944. Lead output has been greater in recent months than in 1944, and the total for the first half of 1945 rose to 164,275,342 pounds from last year's corresponding output of 152,234,710 pounds.

### June Production of Primary Zinc

June production of primary zinc was recorded at 43,469,170 pounds as compared with 45,427,551 in May and 39,759,143 in June of last year. For the first six months of the current year, production of newly-mined zinc aggregated 274,006,199 pounds as compared with 267,059,405 pounds in the similar period of 1944.

### Manufactures of the Non-Metallic Minerals

According to a preliminary compilation of returns, the production in 1944 by the manufacturing industries which used non-metallic minerals as their principal materials amounted to \$406,934,995 at factory prices, an increase of 4.7 per cent over the corresponding 1943 value of \$388,713,942. A gain of \$16,000,000 in the petroleum products industry accounted for most of this advance.

### Production of Motor Vehicles in June

Production of motor vehicles in Canada in June totalled 14,532 units as compared with 15,045 in the preceding month and 14,317 in the corresponding month of last year. During the first six months of 1945, 85,675 units were produced as compared with 79,938 in the first half of 1944. Production in June and in the cumulative period was limited to commercial and military vehicles.

### Civil Aviation in April

Civil air carriers transported 32,858 revenue passengers in April as compared with 30,166 in the corresponding month of last year. The revenue passenger miles flown increased from 9,714,090 to 10,153,200. Freight declined from 762,878 to 602,898 pounds, and mail decreased from 561,389 to 523,230 pounds. Revenues of Canadian licensed carriers fell from \$1,454,325 in April last year to \$1,254,722, operating expenses from \$1,595,283 to \$1,360,831, and the net operating deficit was reduced from \$140,958 to \$106,109.



### Stocks of Raw Hides and Skins

Stocks of raw cattle hides held by tanners, packers and dealers in Canada at the end of June amounted to 652,044 as compared with 643,842 at the end of May, and 436,141 at the end of June, 1944. Calf and kip skins on hand increased from 552,572 in May to 623,251. Stocks of other types at the end of June this year included 78,569 dozen sheep and lamb skins, 290,970 goat and kid skins and 15,781 horse hides.

### Renewals of Unemployment Insurance Books

Unemployment insurance books were renewed for 2,209,850 persons as at April 1, 1944, including 1,447,530 males and 762,320 females, according to a tabulation compiled by the Dominion Bureau of Statistics. Books renewed in Ontario numbered 942,770, Quebec 647,110, British Columbia 198,620, Manitoba 125,530, Nova Scotia 93,970, Alberta 85,410, New Brunswick 59,980, Saskatchewan 51,970, and Prince Edward Island 4,490. These numbers represent employment in insurable employment as at April, 1944.

According to the tabulation, 1,191,290 persons were employed in manufacturing, which comprised the largest industrial category. In other industrial classifications, numbers employed were as follows: trade, 313,430; service, 253,880; transportation and communications, 178,190; mining and quarrying, 78,020; construction, 67,110; and finance and insurance, 63,930.

The age composition of the employed persons was quite different for the two sexes, 75 per cent of the females and 42 per cent of males being under 35 years of age. In all age groups, with the exception of those from 16 to 24 years, the book renewals for males were in the majority by considerable margins. This reflects the increased employment of young females to replace males enlisted in the armed forces.

### Revenues and Expenses of Railways in May

Canadian railways earned \$66,311,535 in May as compared with \$66,598,556 in May, 1944. Freight revenue showed a slight increase but passenger revenue declined by \$568,393 or 5.6 per cent. Operating expenses increased from \$50,862,564 to \$51,963,839, and the operating income declined from \$11,204,016 to \$10,758,994. The total pay roll increased from \$29,438,326 to \$29,558,051. For the five months ended May, operating revenues declined from \$316,116,920 in 1944 to \$310,273,246, operating expenses increased from \$245,255,700 to \$253,303,261, and the operating income declined from \$49,364,586 to \$39,832,454.

Operating revenues of Canadian lines of the Canadian National Railway increased from \$32,138,400 in May 1944, to \$33,269,700, or by 3.5 per cent. Passenger revenue declined by \$243,900 but freight revenue increased by \$1,210,700. Operating expenses increased by \$593,625 and the operating income increased from \$5,698,460 to \$6,352,271. For January - May, system operating revenues declined from \$176,190,000 to \$174,212,000, operating expenses increased from \$143,642,000 to \$144,162,000, and the operating income was reduced from \$27,733,899 to \$25,395,135.

Operating revenues of the Canadian Pacific Railway Company declined from \$27,479,078 in May 1944, to \$26,662,150. Both freight and passenger revenues declined but other items showed increases. Operating expenses increased by \$933,975 or 4.6 per cent and the operating income was reduced from \$4,470,359 to \$3,536,949. For the period January to May, operating revenues amounted to \$127,109,669 in 1945 to \$128,483,785 in 1944, operating expenses increased from \$96,671,311 to \$105,156,231, and the operating income was reduced from \$18,141,958 to \$12,567,321.

### Car Loadings on Canadian Railways

Car loadings on Canadian railways for the week ended July 28 increased to 73,442 cars from 71,810 cars for the preceding week and 71,268 for the corresponding week of last year. In the eastern division, loadings increased from 44,566 cars in 1944 to 45,946, and in the western division from 26,702 to 27,496 cars. Grain loadings continued heavy, increasing from 11,871 cars last year to 13,570. Loadings of fresh vegetables increased from 213 to 410 cars, coke from 580 to 890 cars, sand, stone, gravel, etc. from 3,387 to 3,985 cars, pulpwood from 2,491 to 3,024 cars, automobiles, trucks and parts from 1,203 to 1,585 cars, and wood pulp and paper from 2,783 to 3,217 cars. Live stock declined from 2,444 to 2,186 cars, and coal from 5,059 to 4,520 cars.



Press Fill from Bureau Records

Douglas fir is the largest tree in Canada. It usually attains a height of from 150 to 200 feet, and a diameter of three to six feet, but it is sometimes found reaching heights of over 300 feet and diameters up to 15 feet. The trunk is straight and free of limbs for 70 feet or more. It has the heaviest bark of any tree in Canada, sometimes 10 to 12 inches thick. In Canada this tree ranges from the east slope of the Rocky Mountains in Alberta through to the coast in British Columbia, but the best commercial stands are on Vancouver Island and the adjacent mainland. As a source of the largest-sized structural timbers in commercial quantities, this species is unsurpassed. Douglas fir is obtainable clear from defect in large dimensions and has a wide range of uses - particularly as a structural timber. Flooring for dwelling houses and for heavy dock construction, general building purposes, water-pipes, silos, veneers and plywoods are some of its various channels of utilization. Production of Douglas fir lumber in Canada in 1943 amounted to 1,233,953,000 feet board measure valued at \$38,113,000.

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Reports Issued During the Week

1. Employment Covered by the Unemployment Insurance Act as of April, 1944 (25 cents).
  2. Current Trends in Food Distribution, June (10 cents).
  3. Statistics of Man-Hours and Hourly Earnings, June 1 (10 cents).
  4. Monthly Traffic Report of Railways, April (10 cents).
  5. Operating Revenues, Expenses and Statistics of Railways, May (10 cents).
  6. Production of Silver, Lead and Zinc, June (10 cents).
  7. Stocks of Raw Hides and Skins, June (10 cents).
  8. Car Loadings on Canadian Railways - Weekly (10 cents).
  9. Production of Iron and Steel, June (10 cents).
  10. Civil Aviation, April (10 cents).
  11. Price Movements, July (10 cents).
  12. Commercial Failures in Second Quarter of 1945 (10 cents).
  13. Monthly Indexes of Wholesale Sales, June (10 cents).
  14. Automobile Production, June (10 cents).
  15. Manufactures of the Non-Metallic Minerals, 1944 (15 cents).
  16. Monthly Review of the Dairy Situation, July (10 cents).
  17. Canadian Grain Statistics - Weekly (10 cents).
  18. Monthly Indexes of Retail Sales, June (10 cents).
  19. First Estimate of Production of Fall Wheat, Fall Rye and Alfalfa. Condition of Field Crops, July 31 (10 cents).
  20. Telegraphic Crop Report, Canada (10 cents).
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