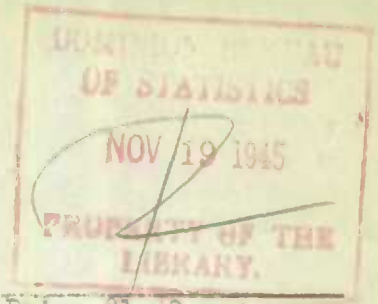


WEEKLY BULLETIN

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Economic Conditions During First Nine Months of 1945

The main factors indicating the trend of economic conditions were uneven in the first nine months of 1945 as compared with the same period of the preceding year. An advance of 16.6 per cent was shown in the index of common stock prices and speculative trading was at a higher level. The advance in commodity and bond prices was of minor proportions. The index of wholesale prices, on the base of 1926, averaged 103.2 in the first nine months against 102.6 in the same period of last year. The price of high-grade bonds was slightly higher as indicated by a decline in yields. Productive operations receded to lower levels, the index of the physical volume of business dropping 20 points to 219.2. The decline amounted to 8.4 per cent.

New business obtained by the construction industry rose nearly 32 per cent to \$309,000,000, and building permits in 58 municipalities were more than 31 per cent greater. The total in the first nine months of the present year was \$95,500,000. The output of steel ingots was 2,248,000 tons against 2,236,000 tons, an increase of 0.5 per cent. The production of pig iron, on the other hand, showed a decline from 1,412,000 tons to 1,367,000.

The index of employment on September 1 last in manufacturing plants producing durable goods was 122.1 against 150.5 on the same date last year. The index of the number employed in manufacturing plants producing non-durable goods also declined from 120.5 to 114.7, but the drop was of lesser proportions than in durable goods. The index of retail sales during the eight months of the present year rose 8.4 per cent over the standing in the same period of 1944. The index was 172.5 against 159.1 in the same period last year. The percentage increase in wholesale sales was even greater, having been 10.9 per cent rather than 8.4 per cent. The index was 198.8 against 182.2, on the base of 1935-39.

The ordinary expenditures of the Dominion Government during the first half of the present fiscal year covering April to September recorded a gain of more than 45 per cent. The total was \$477,600,000 against \$329,100,000 in the same period of 1944. War expenditures, exclusive of Mutual Aid, receded from \$1,628,000,000 to \$1,023,000,000, a decline of 37 per cent. An increase on the other hand was shown in Mutual Aid payments.

The purchasing power in the hands of the public continued at high levels in the first nine months of the present year. The firms reporting in the latest survey of payrolls intimated the disbursement of weekly salaries and wages aggregating \$56,500,000 as compared with \$57,500,000 at the beginning of August. This was a decline of 1.6 per cent, slightly exceeding the general loss of 1.3 per cent in the personnel, with the result that the per capita weekly earnings declined, falling from \$32.09 at August 1 to \$32.04 at September 1. At the beginning of September in earlier years for which information is available, the averages were: 1944, \$31.69; 1943, \$31.30; 1942, \$29.29; 1941, \$26.04.

The decline in the index of the physical volume of business was mainly occasioned by the drop in mineral and manufacturing production. The consumption of firm power also showed a decline from 26,500,000,000 k.w.h. to 24,100,000,000, representing a loss of 9.1 per cent. Minor recessions were also shown in railway traffic. Tons carried one mile by the two main railways during the first eight months showed a decline of 1.8 per cent, while carloadings were 1.3 per cent lower in the nine-month comparison.

Second Estimate of Grain, Root and Fodder Crops

Canada's 1945 wheat production is now placed at 308,600,000 bushels, according to the second estimate issued by the Dominion Bureau of Statistics. Oat production for this year is estimated at 378,300,000 bushels, barley at 156,300,000 bushels and flaxseed at 7,400,000 bushels. The second estimates of grain crops, as compared with those released on September 12, are generally lower, principally due to lower estimates of yields in the Prairie Provinces. The second estimate of wheat production is lower by 12,800,000 bushels, while the oat crop is down 10,000,000 bushels. The reduction from the first estimate in the barley crop amounts to 4,900,000 bushels, while that for flaxseed is raised slightly.

Most of the reduction in the second estimate of the wheat crop occurs in Saskatchewan where the outturn is now placed at 158,000,000 bushels as compared with 167,000,000 bushels in the first estimate. The reductions in the wheat crop estimates for Manitoba and Alberta amount to 2,000,000 bushels each. Oat production has been lowered by 1,000,000 bushels in Manitoba and 4,000,000 bushels in both Saskatchewan and Alberta. The total yield of barley has been cut by 3,000,000 bushels in Manitoba, 1,000,000 bushels in Saskatchewan and 1,000,000 bushels in Alberta.

Total rye production in 1945 is now placed at 5,963,000 bushels, representing a decrease from the 1944 production of 2,563,000 bushels. The second estimate of the rye crop is 489,000 bushels lower than the first estimate. The slight increase in the second estimate of the flaxseed crop is the result of a larger estimate for that crop in Manitoba, although there are slight reductions in Saskatchewan and Alberta.

The second estimates of peas and shelled corn show only slight changes from the figures released in September. Pea production is estimated now at 1,192,000 bushels as compared with the first estimate of 1,171,000 bushels, while the output of shelled corn is reduced by 80,000 bushels to a total of 10,365,000 bushels.

The second estimate of the 1945 potato crop indicates a crop of 36,235,000 hundred-weight, which is an increase over the first estimate of 1,051,000 hundredweight. Sugar beets, now estimated at 610,000 tons are reduced by 8,000 tons from the first estimate.

The estimates of forage crop production are only slightly changed from those previously issued. The 1945 crop of hay and clover at 17,900,000 tons is 2,800,000 tons higher than the 1944 production. Fodder corn at 4,000,000 tons is approximately 400,000 tons lower than in 1944. The alfalfa crop, estimated at 3,900,000 tons, is slightly larger than that of last year.

Stocks and Marketings of Wheat and Coarse Grains

Stocks of Canadian wheat in store or in transit in North America at midnight on November 8 totalled 222,875,053 bushels as compared with 356,043,302 on the corresponding date of last year, a decrease of 37.4 per cent. The visible stocks on the latest date included 202,758,494 bushels in Canadian positions as compared with 323,697,564 bushels, and in United States positions, 20,116,559 bushels as compared with 27,345,738.

Deliveries of wheat from farms in the Prairie Provinces during the week ended November 8 amounted to 10,443,807 bushels as compared with 11,603,058 a year ago. From the commencement of the present crop year to November 8, deliveries of wheat from farms totalled 140,923,769 bushels as compared with 156,567,722 in the similar period of the crop year 1944-45.

The following quantities of coarse grains were also delivered from farms in the Prairie Provinces during the week ended November 8, totals for the preceding week being in brackets: oats, 1,573,340 (2,450,085) bushels; barley, 2,243,460 (3,329,675); rye, 70,096 (169,309); flaxseed, 139,218 (340,464).

Stocks of Foods in Cold Storage

Stocks of creamery butter in cold storages, in dairy factories and in transit at the opening of business on November 1 totalled 64,219,915 pounds as compared with 71,588,806 pounds on October 1, and 63,820,301 pounds on the corresponding date of last year, according to figures released by the Dominion Bureau of Statistics. The quantity of cheese on hand and in transit was 54,939,433 pounds compared with 63,169,930 pounds last month, and 57,409,125 pounds a year ago.

Holdings of evaporated whole milk by manufacturers on November 1 totalled 32,857,204 pounds as compared with 39,513,160 pounds on October 1, and 35,502,566 pounds on November 1, 1944. The chief by-product, skim milk powder, amounted to 4,403,260 pounds as compared with 5,611,224 pounds on October 1 this year, and 3,934,569 pounds on November 1 last year.

Shell eggs have decreased sharply in the past month, stocks on November 1 amounting to 5,396,954 dozen as compared with 13,471,022 dozen on October 1. They were, however, larger than the stocks of November 1 last year, which amounted to 4,374,345 dozen. Frozen egg meats were also reduced; the holdings on November 1 amounted to 22,112,818 pounds as compared with 27,305,153 pounds on October 1, while a year ago the total was 43,332,917 pounds.

Stocks of poultry, while seasonally higher than last month, were considerably lower than the holdings of a year ago. The stocks on November 1 were 9,820,428 pounds, while on October 1 the total was 6,419,241 pounds, and on November 1 last year, 14,105,899 pounds.

The total of all meat in Canada, held by packers, abattoirs, wholesale butchers, and cold storage warehouses, was 76,725,168 pounds as compared with 69,738,326 pounds last month, while a year ago the aggregate was 79,910,341 pounds. Of the current stocks, 27,994,158 pounds were Canadian pork, 35,736,102 pounds beef, 6,741,161 pounds veal, and 6,203,747 pounds mutton and lamb. The quantity of lard on hand was 709,163 pounds, recording a slight decrease from last month when the stocks were 805,069 pounds, but a huge decrease from the November 1, 1944, total of 4,570,491 pounds.

On November 1 there were 38,475,391 pounds of frozen fresh fish as compared with 36,951,727 pounds on October 1 and 42,408,510 pounds on November 1 last year. Holdings of frozen smoked fish amounted to 1,991,250 pounds, while a month ago the total was 1,955,852 pounds, and a year ago, 2,039,086 pounds. On November 1 this year holdings of salmon totalled 10,368,876 pounds, and sea herring 7,352,549 pounds.

The quantity of fruit, frozen and in preservatives, on hand on November 1, totalled 28,855,409 pounds. On October 1 the total was 32,010,781 pounds, while on November 1 last year the aggregate was 33,550,535 pounds. Holdings of vegetables, frozen and in brine, amounted to 5,273,814 pounds as compared with 7,103,710 pounds a month ago and 7,475,725 pounds last year.

Holdings of potatoes at distributing centres only amounted to 23,812 tons as compared with 2,487 tons on October 1, and 76,141 tons on November 1 last year. Onions were 11,971 tons, while a year ago the amount was 19,442 tons. Celery stocks are now beginning to show in storage, the November 1 total amounting to 196,619 crates, while a year ago there were 280,163 crates at distributing centres.

Production of Butter and Cheese in October

The creamery butter position was not materially changed by the October output which showed a reduction of only $1\frac{1}{2}$ per cent as compared with the same month last year; and the January to October make was reduced by one-half of one per cent. October production amounted to 24,025,000 pounds and the ten-month production was 268,300,000 pounds. With the closing of cheese factories and the removal of restrictions on factory patronage it seems possible that the situation may improve somewhat during the last two months of the year.

Cheddar cheese production dropped to 17,600,000 pounds in October, a decline of over 10 per cent compared with the same month of the preceding year. This places the cheddar cheese make for the ten months ended October at 170,800,000 pounds as against 164,500,000 in the same period of 1944. The increase was approximately four per cent. This situation may be credited to the switch-over from cheese to butter as indicated.

The ice cream make dropped to 1,005,000 gallons, a decline of 13 per cent as compared with October, 1944; and the January to October output was 15,500,000 gallons, or approximately $4\frac{1}{2}$ per cent less than that made in the similar period of 1944.

Concentrated milk products registered a sharp decline in October, moving from 22,600,000 pounds in 1944 to 21,200,000 pounds in 1945, a percentage reduction of approximately six per cent. The January to October output was 267,900,000 pounds, an increase of over nine per cent. Whole-milk products reflected the reduction in October, the 17,200,000 pounds being almost nine per cent below that of the same month of 1944; but the 10-month output of 217,900,000 pounds was up nearly seven per cent. Evaporated milk, amounted to 14,095,000 pounds during the current month, a reduction of approximately $1\frac{1}{2}$ per cent, and the make for the 10 months, amounting to 180,900,000 pounds was 13 per cent greater than that shown in the same period of 1944. Skim milk powder also declined in October, the output of 2,400,000 pounds being five per cent less than that shown in the same month of last year; and the total to date was 32,600,000 pounds, or 22 per cent less than that reported in the 10-month period of 1944.

Tobacco Crop Estimates for 1945

The commercial production of leaf tobacco in Canada in 1945 has been estimated by the Dominion Bureau of Statistics at 97,314,850 pounds as compared with 105,415,500 pounds in the preceding year, a decrease of 7.7 per cent. The tobacco acreage this year was 93,697 as compared with 88,495 in 1944. Production of flue cured tobacco totalled 79,046,250 pounds as compared with 86,669,000 in 1944, burley tobacco 11,581,000 pounds as compared with 12,223,000, dark tobacco 1,488,100 pounds as compared with 1,556,700, cigar leaf 2,453,000 pounds as compared with 2,976,000, and pipe tobacco 2,746,500 pounds as compared with 1,990,800.

Canadian Shorn Wool Production

Production of shorn wool in Canada in 1945 has been tentatively estimated at 14,513,000 as compared with 15,128,000 pounds in 1944, according to figures released by the Dominion Bureau of Statistics. The reduction in the 1945 clip is entirely due to a decrease in the numbers of sheep shorn as compared with a year ago. The average weight per fleece at 7.6 pounds in 1945 was fractionally higher than that of the preceding year. The estimated production in 1945 was slightly lower in all provinces except Prince Edward Island, where a slightly higher average weight per fleece offset a minor decline in numbers of sheep shorn.

Sales of Manufactured and Natural Gas in September

Sales of manufactured gas by distributing companies in September totalled 1,728,509,000 cubic feet as compared with 1,737,032,000 in the corresponding month of last year. Of this year's September output, 1,024,570,000 cubic feet were for domestic use, other than house heating; 387,929,000 cubic feet for industrial use; 289,065,000 cubic feet for commercial use; 22,928,000 cubic feet for house heating, and 4,017,000 cubic feet for other uses.

September sales of natural gas amounted to 1,638,577,000 cubic feet as compared with 1,530,130,000 in the same month of last year. In September this year, 617,711,000 cubic feet were for domestic use; 315,429,000 cubic feet for commercial use; 655,318,000 cubic feet for industrial use, and 40,119,000 cubic feet for other uses.

Food Chains in Canada in 1944

Total sales made by all grocery, combination and meat market chains during 1944 amounted to \$204,852,500, recording an increase of 10.2 per cent over the 1943 figure of \$185,974,600, according to a survey conducted by the Dominion Bureau of Statistics. Sales volume of these systems constituted a new high record in 1944. The advance was spread fairly evenly throughout the different economic regions of Canada, less-than-average increases being registered in British Columbia, Manitoba and the Maritime Provinces, where gains of 5.5 per cent, seven per cent, and 7.8 per cent, respectively, were shown.

Births, Deaths and Marriages in September

Births registered in cities, towns and villages of Canada, having a population of 10,000 and over numbered 11,259 in September, deaths 4,551 and marriages 6,081, as compared with 10,422 births, 4,481 deaths and 5,323 marriages in September last year, showing increases of eight, two and 14 per cent, respectively, for births, deaths and marriages.

Man-Hours and Hourly Earnings at September 1

At the beginning of September, manufacturers throughout the Dominion reported a further important decline in the number of wage-earners employed at hourly rates, in the aggregate hours worked and in the hourly earnings of such persons as compared with a month earlier; the average hours worked and the average hourly earnings were also lower, according to information received by the Dominion Bureau of Statistics.

Data were furnished by 6,162 manufacturing establishments employing at September 1 a staff of 775,609 men and women paid at hourly rates. The hours worked by these persons totalled 34,235,010, while the sum of \$23,676,760 was paid for services rendered during these hours. At August 1, the same plants had reported 804,290 hourly-rated wage-earners,

who had put in an aggregate of 35,631,919 hours, receiving \$24,765,073 in payment. There was accordingly a reduction of 3.6 per cent in the number of wage-earners, 3.9 per cent in the aggregate hours worked and 4.4 per cent in the hourly wages disbursed. The average hours per worker fell from 44.3 in the week preceding August 1, to 44.1 in the week preceding September 1, while the average hourly earnings were lowered by 69.5 cents in the former, to 69.2 cents in the latter period of observation.

The reduction in the average hourly earnings in manufacturing as a whole in the month -- the fourth in succession -- resulted in part from important changes taking place in the industrial distribution of the wage-earners for whom statistics of hourly earnings are available; such changes were due to a considerable extent to the cancellation of war contracts, although seasonal movements in industry were also partly responsible. In plants producing durable manufactured goods, there was a decrease of some 28,800 workers employed at hourly rates, while the average hours worked were rather lower, as were the average hourly earnings. On the other hand, there was a small advance in employment for hourly-rated workers in the non-durable goods industries, in which the averages of hours worked, and of hourly earnings were also somewhat higher.

Further curtailment in overtime work, partly resulting from cut backs of wartime production, and during the holiday season, also contributed to the falling-off of 0.3 cents in the general average earnings in manufacturing; this change follows a loss of 0.6 cents indicated in the preceding period of observation. Still another factor in the situation was the increasing employment of workers in those branches of industry in which rates are usually relatively low.

Car Loadings on Canadian Railways

Car loadings on Canadian railways for the week ended November 3 declined to 76,975 cars from 78,755 cars in the preceding week, but were 3,514 cars above the total of 73,461 cars for the corresponding week of last year. In the eastern division, loadings declined from 46,540 cars in 1944 to 46,366 cars, but in the western division the total advanced from 26,921 to 30,609 cars.

Reports Issued Today

1. Car Loadings on Canadian Railways - Weekly (10 cents).
 2. Telegraphic and Cable Statistics, 1944 (10 cents).
 3. Man-Hours and Hourly Earnings, September 1 (10 cents).
 4. Tobacco Crop Report (10 cents).
 5. Registrations of Births, Deaths and Marriages, September (10 cents).
 6. Economic Conditions During First Nine Months of 1945 (10 cents).
 7. Food Chains in Canada, 1944 (25 cents).
 8. Second Estimate of Grain, Root and Fodder Crops. Area and Condition of Fall Wheat and Fall Rye. Progress of Fall Ploughing (10 cents).
 9. Canadian Shorn Wool Production, 1945 (10 cents).
 10. Sales of Manufactured and Natural Gas, September (10 cents).
 11. Operating Revenues, Expenses and Statistics of Railways, August (10 cents).
 12. Monthly Dairy Review of Canada, October (10 cents).
 13. Stocks of Dairy and Poultry Products, November 1 (10 cents).
 14. Stocks of Fruit and Vegetables, November 1 (10 cents).
 15. Cold Storage Holdings of Meat and Lard, November 1 (10 cents).
 16. Cold Storage Holdings of Fish, November 1 (10 cents).
 17. Canadian Grain Statistics - Weekly (10 cents).
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The first part of the report is a summary of the work done in the field of statistics during the year 1967. It is divided into two main sections: a summary of the work done in the field of statistics during the year 1967, and a summary of the work done in the field of statistics during the year 1967.

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Appendix 1: List of Publications

1. Statistics Canada, *Annual Report 1967*, Ottawa, 1968, 100 pages.
2. Statistics Canada, *Annual Report 1967*, Ottawa, 1968, 100 pages.
3. Statistics Canada, *Annual Report 1967*, Ottawa, 1968, 100 pages.
4. Statistics Canada, *Annual Report 1967*, Ottawa, 1968, 100 pages.
5. Statistics Canada, *Annual Report 1967*, Ottawa, 1968, 100 pages.
6. Statistics Canada, *Annual Report 1967*, Ottawa, 1968, 100 pages.
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18. Statistics Canada, *Annual Report 1967*, Ottawa, 1968, 100 pages.
19. Statistics Canada, *Annual Report 1967*, Ottawa, 1968, 100 pages.
20. Statistics Canada, *Annual Report 1967*, Ottawa, 1968, 100 pages.