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Economic Conditions in Canada During 1944

Economic activity in Canada during 1944 was greater than in any other year. The index of the physical volume of business based on factors representing the trend of production and distribution averaged 236.8 compared with 235.9 in the preceding year. Productive operations reached a new high point in 1944, despite the recession in the later months of the year. The spectacular advance from the outbreak of hostilities to about one year ago resulted in a level of operations far in advance of any other period in Canada's history. The index in the last month of the year showed a slight increase over the preceding month, the year ending on an optimistic note.

The deposit liabilities of the chartered banks recorded a marked advance during the war period, reaching a new high level at the beginning of December last year. The average for the first eleven months of 1944 was \$4,667,000,000 against \$3,969,000,000, an increase of no less than 17.6 per cent. Wholesale prices were relatively stable during 1944. The index, however, was 2½ per cent. above the average for the preceding year. The marked advance between September 1939 and the latter part of 1943 re-established the parity with the base. The index passed through the base line in July 1943 and has since fluctuated slightly above that level, the index averaging 102.5 during 1944. High-grade bond prices were relatively steady during the year, an upward drift having been discernible. The index of bond yields consequently showed recession in 1944 from the preceding year. The index on the base of 1935-39 averaged 97.1 against 97.5, a decline of 0.4 per cent. Bond prices have been relatively steady since the beginning of 1940, the levels of 1943 and 1944 being slightly above the three preceding years.

Speculative factors including the prices of common stocks and the number of shares traded on the stock exchange recorded less fluctuation in 1943 and 1944 than in most other periods of similar duration. An index of common stock prices on the five year pre-war base was 83.8 in 1944 against 83.5 in the preceding year, a gain of 0.4 per cent.

The national income of Canada on a tentative footing, moving up to \$9,186,000,000 in 1944, exceeded all previous records. The increase over 1943 was 5.3 per cent, the total in that year having been \$8,724,000,000. Income originating in agriculture showed a marked gain, while increases in manufacturing and government were of lesser proportions.

The maximum monthly income was reached in October last year when agricultural marketings attained a high level. The standing in December was \$766,300,000 compared with \$777,700,000 in November. The total in the last month of the year was below the level of December 1943 computed at \$785,300,000.

The components of the index of the physical volume of business were uneven in 1944 compared with the preceding year. Mineral and manufacturing production were at slightly lower levels. The construction industry was more successful in obtaining new business. The distribution of commodities was in a considerably heavier volume than in the preceding year. The consumption of firm power showed a decline of 1.6 per cent.

The index of mineral production based on 15 factors receded from 242 to 226, a drop of 6.5 per cent, while that for manufacturing production declined one-half per cent to 292.3. The new business obtained by the construction industry recorded a marked expansion. Contracts awarded rose 41.7 per cent, while building permits in 58 municipalities were 55 per cent greater. The consumption of firm power was 35,151,000,000 kilowatt hours as compared with 35,719,000,000 in the preceding year. The general index of employment, despite the recession in war production was nearly maintained in 1944. The index dropped, however, from 184.1 to 183.0, a decline of 0.6 per cent.

The export trade recorded a marked expansion in 1944. The total was \$3,483,000,000, an increase of 16 per cent over 1943. As the imports showed only minor percentage gain the active balance of trade exclusive of gold rose more than 88 per cent to \$1,724,000,000. The net exports of non-monetary gold receded from \$142,000,000 to \$109,700,000.

Inventories of Food Commodities in Cold Storage

Stocks of creamery butter on hand in dairy factories, in cold storages and in transit on the railways at the opening of business on February 1 totalled 30,618,570 pounds as compared with 40,789,705 on January 1 and 33,345,748 on the corresponding date of last year. The apparent net 'out-of-storage' movement during the month of January was 9,702,133 pounds. Cheese stocks on February 1 this year aggregated 32,427,835 pounds as compared with 40,340,439 on January 1 and 33,296,819 on February 1, 1944.

The stocks of evaporated whole milk owned and held by manufacturers on February 1 were 22,837,615 pounds as compared with 32,401,762 on January 1 and 5,381,867 on February 1, 1944. Holdings of skim milk powder, the chief by-product, totalled 3,206,813 pounds as compared with 3,231,089 on January 1 and 861,205 on February 1, 1944.

Shell eggs in storage and in transit and frozen eggs on February 1 amounted to the equivalent of 829,828 cases as compared with 895,097 cases a month ago and 299,385 cases on February 1, 1944. The total of dressed poultry on February 1 was 21,073,527 pounds as compared with 24,219,275 on January 1 and 26,796,840 on February 1, 1944. Of the current stocks, 8,791,526 pounds were chickens, 6,178,448 pounds fowl and 3,955,499 pounds turkeys.

Holdings of pork were much reduced from last year, the total standing at 48,437,987 pounds as compared with 93,359,645 pounds. Last month the total was 48,685,933 pounds. Beef stocks were 34,937,504 pounds as compared with 31,828,198 a month ago and 38,661,387 a year ago. Veal stocks were lower, amounting to 3,682,030 pounds as compared with 5,132,612 last month and 4,439,394 last year. Stocks of mutton and lamb were 5,936,405 pounds as compared with 6,918,350 on January 1 and 9,081,105 on February 1, 1944.

Frozen fish holdings on February 1 this year totalled 21,258,308 pounds, of which 19,731,683 pounds were frozen fresh and 1,526,625 frozen smoked. The frozen fresh fish stocks last year were 26,803,415 pounds and last month, 28,055,669 pounds while the frozen smoked holdings a year ago were 1,649,962 pounds and a month ago, 2,021,743 pounds. The February 1, 1945 holdings of cod were 3,298,431 pounds, haddock 410,775, smoked fillets 676,214, salmon 4,018,679, and sea herring 5,829,413 pounds.

Apples in storage on February 1 totalled 3,852,733 bushels as compared with 5,844,494 bushels on January 1 and 2,608,399 bushels last year. Pears on hand amounted to 4,607 bushels of Canadian and 10,421 bushels of imported. Fruit, frozen and in sulphur dioxide or benzoate of soda, totalled 28,708,270 pounds. At the same date of last year the total was 29,309,034 pounds, while a month ago there were 30,549,014 pounds in store.

Stocks of Canadian-grown fresh vegetables on February 1 were: potatoes 259,080 tons, onions 16,235 tons, beets 1,402 tons, carrots 5,864 tons, cabbages 3,540 tons, parsnips 1,255 tons and celery 13,480 crates. In addition, there were imported stocks consisting of 39 tons of potatoes, 109 tons of onions, 57 tons of carrots, 27 tons of cabbages and 11,269 crates of celery.

Dairy Production in January

Creamery butter production in January amounted to 11,424,000 pounds, an increase of over five per cent as compared with the same month of the preceding year; the quantity of cheddar cheese manufactured in January fell to 2,418,000, a decline of 6.5 per cent. The most pronounced increases in the creamery butter make were recorded in Prince Edward Island and Quebec due to the closing of cheese factories and the diversion of milk to the butter-making channel. A factor of some importance in so far as Quebec is concerned was the cancellation of the provincial subsidy of two cents a pound on cheese.

Milk production reported for the month of December amounted to 986,000,000 pounds which represented an increase of approximately one half of one per cent over the same month of the preceding year. For the whole of 1944 milk production has been tentatively estimated at 17,598,000,000 pounds, exceeding that of 1943 farm milk supply by nearly 79,000,000 pounds. The December records showed very little change in the use of milk for different purposes as compared with that used in the same month of 1943. Fluid sales advanced only 1.3 per cent and this was offset by a decline in milk used in farm homes; while the total used in manufacture reflected the slight advance recorded in the total milk supply.

Despite the intensely cold weather and heavy snow falls in December and early January the production situation on the whole has been relatively satisfactory. The milk flow suffered to some extent from temperature extremes in December. In January cold spells

were of short duration and it was easier for farmers to procure feed supplies and make regular deliveries to market. Feeds appear to be quite plentiful in most sections of the Dominion, but there is a shortage of hay in the Eastern Provinces. Labour shortages have been reported from many localities and it is apparent that the shortage of labour may become a formidable factor in achieving war-time objectives during the forthcoming season.

Sales income from dairy production for 1944 is estimated at \$264,000,000 as compared with \$243,000,000 in 1943 and \$219,000,000 in 1942. Milk used in the production of butter represented 41.5 per cent of the 1944 income; while that for fluid was 36.8 per cent, and milk used for the production of factory cheese, concentrated milk products and ice cream represented 15.4 per cent, 4.7 per cent and 1.6 per cent respectively. The weighted average income for all products in 1944 amounted to \$1.87 per hundred pounds of milk in 1944 as compared with \$1.73 and \$1.57 in 1943 and 1942 respectively.

Fisheries Production of the Province of Quebec

The fisheries production of the Province of Quebec was valued at \$5,817,000 in 1943, an increase of nearly 39 per cent over the preceding year. The increase was due more to higher prices than to greater quantities caught as the latter increased by less than two per cent. The sea fisheries accounted for 86 per cent of the total marketed value, and the inland fisheries the remaining 14 per cent, the respective values standing at \$5,012,000 and \$805,000. Cod was the chief fish in marketed value, amounting to \$3,086,000, followed by herring at \$576,000, and mackerel at \$441,000. The quantity of fish of all kinds, including shell fish, taken by Quebec fishermen during 1943 totalled 1,136,781 cwt. as compared with 1,115,848 in 1942.

Crop Reporting Program for 1945-46

The Dominion Bureau of Statistics has made public its annual crop reporting calendar, showing the dates of issue and subject matter of a series of 25 crop reports to be released during 1945-46.

The first crop report of the year is to be issued on May 9. This report will measure the extent to which farmers intend to plant field crops, together with an estimate of winter-killing and spring condition of fall wheat, fall rye and hay and clover meadows. A progress report of spring seeding will be included.

Fortnightly telegraphic crop reports covering the whole Dominion will be issued commencing May 15 and continuing throughout the growing season. Similar releases for the three Prairie Provinces will be made public. Statements showing the condition of crops at the end of June, July and August are to be released.

A preliminary estimate of the areas sown to field crops is to be issued by the Bureau on July 20, and on August 9 the first estimate of production of fall wheat, fall rye and alfalfa will be announced. On August 17 the stocks of grain in Canada at the end of the crop year 1944-45 will be made known.

The first estimate of production of principal spring-sown grain crops and hay and clover will be released on September 12, and the first estimate of production of root, fodder and late-sown crops on October 11. On November 14, the second estimate of production of grain, root and fodder crops will be published together with a recording of the area and condition of fall wheat, fall rye, and a progress report of fall ploughing. The first estimate of the value of field crops produced during the year is to be published on December 12.

The third estimate of production and value of field crops is to be issued on January 22, 1946, and on April 17 an estimate of the stocks of grain as at the end of March 1946 will be made public.

Car Loadings on Canadian Railways

Car Loadings on Canadian Railways for the week ended February 6 showed a slight increase over the preceding week, advancing from 65,342 cars to 65,471 cars. There was, however, a decrease of 2,331 cars from last year's corresponding total of 67,802 cars. In the eastern division loadings declined from 42,651 cars in 1944 to 41,982 cars, and in the western division from 25,151 to 23,489 cars.

Loadings of grain decreased from 7,393 cars in the corresponding week of last year to 6,746 cars, hay and straw from 1,011 to 518 cars, live stock from 2,854 to 2,409 cars, logs, piling, cordwood and other forest products from 2,653 to 1,842 cars, and ores and concentrates, base bullion, matte, and other mine products from 3,595 to 2,327 cars.

Canada's Domestic Merchandise Exports in January

Canada's domestic merchandise exports in January 1945 were valued at \$230,498,000 as compared with \$242,011,000 in the corresponding month of last year, a decrease of \$11,513,000, or 4.8 per cent. The value of basic war materials exported during the first month of 1945 amounted to \$114,898,000 as compared with \$118,878,000 in January 1944.

Domestic merchandise exports to the United Kingdom in January of this year were valued at \$83,230,000 as compared with \$94,813,000 in January 1944, and to the United States \$84,703,000 as compared with \$85,325,000. Exports to British India rose to \$18,022,000 from \$7,505,000, and to Italy to \$12,711,000 from \$7,908,000.

Merchandise exports to other leading countries in January 1945 were as follows, totals for January 1944 being in brackets: British South Africa, \$2,365,000 (\$457,000); Newfoundland, \$3,787,000 (\$2,350,000); Egypt, \$2,314,000 (\$12,725,000); France, \$2,300,000 (nil); Russia, \$4,380,000 (\$7,845,000); Jamaica, \$1,591,000 (\$894,000); Trinidad and Tobago, \$1,357,000 (\$951,000); Australia, \$1,790,000 (\$2,787,000); New Zealand, \$1,382,000 (\$1,788,000); French Possessions, \$1,146,000 (\$5,056,000).

Exports of meats in January of this year advanced to \$15,875,000 from \$12,645,000 in the corresponding month of last year, while wheat exports declined to \$6,606,000 from \$22,856,000 and wheat flour to \$5,643,000 from \$6,638,000. The total of fibres and textiles rose to \$5,033,000 from \$2,987,000. Newsprint exports increased to \$11,313,000 from \$11,033,000, and planks and boards to \$6,402,000 from \$6,253,000. Export of motor vehicles and parts advanced to \$37,354,000 from \$26,317,000.

Other principal commodity exports in January 1945 were as follows, totals for January 1944 being in brackets: vegetables, \$1,525,000 (\$1,054,000); alcoholic beverages, \$2,197,000 (\$1,705,000); seeds, \$1,560,000 (\$1,214,000); fishery products, \$4,361,000 (\$5,743,000); furs, \$3,900,000 (\$4,557,000); eggs, \$2,270,000 (\$1,276,000); wood pulp, \$6,922,000 (\$5,637,000); chemicals, \$8,011,000 (\$8,331,000).

Births, Deaths and Marriages in December

Births registered in cities, towns and villages having a population of 10,000 and over numbered 10,982 in December, deaths 4,859 and marriages 4,184 as compared with 10,442 births, 6,390 deaths and 4,496 marriages in December 1943, showing an increase of five per cent in births and decreases of seven per cent in marriages and 24 per cent in deaths.

Civil Aviation in October

The number of revenue passengers transported by civil air carriers in October 1944 was 33,948 as compared with 36,748 in the preceding month and 26,819 in October 1943. Decreases were recorded in the totals of freight and mail carried, the former declining to 1,042,378 pounds from 1,120,669 pounds in October 1943, and the latter to 537,129 pounds from 598,156. Operating revenues of Canadian licensed carriers increased to \$1,357,169 from \$1,306,320, and operating expenses advanced to \$1,548,223 from \$1,495,964.

Revenues, Expenses and Operational Statistics of Steam Railways in 1943

Railway revenues established a new high record in 1943, aggregating \$778,914,565 as compared with \$663,610,570 in the preceding year, an increase of 17.4 per cent. The increase in freight revenue was \$65,396,112, or 12.9 per cent, and in passenger revenue \$32,328,484, or 35.3 per cent. Other services also showed substantial increases. Comparisons with 1939 show increases in freight revenues of 98.6 per cent, in passenger revenues of 242 per cent and in total revenues of 112 per cent. Monthly reports show that the revenues continued to increase in 1944 but at a considerably lessened rate,

the increase for the first 11 months amounting to 2.9 per cent. Operating expenses in 1943 increased to a new peak of \$560,597,204 as compared with \$485,783,584 for 1942 and \$304,373,285 for 1939.

Freight traffic reached a new high record in 1943 with an increase of 13.8 per cent in tons of revenue freight carried. There were increases over 1942 of 5.7 per cent in freight train miles, 5.5 per cent in loaded car miles and also in empty freight car miles. Passenger traffic showed a still better record, passengers carried increasing by 20.1 per cent, passenger miles by 30.8 per cent, for an increase in passenger train miles of only 5.7 per cent. These results were due to heavier average loading of trains and heavier loading of cars.

The number of employees, which is the average of counts made each month, increased from 157,740 in 1942 to 169,663 or by 7.6 per cent, and the pay roll increased from \$291,416,755 to \$323,801,645 or by 11.1 per cent. Pay roll charged to operating expenses increased to \$294,075,723 from \$262,981,536 in 1942 or by 11.8 per cent. Comparisons with 1939 show an increase in the number of employees of 31 per cent, in operating pay roll of 59 per cent, in operating revenue of 112 per cent, in revenue ton miles of 103 per cent and in passenger miles of 272 per cent.

During the year, 4,346 freight cars were retired from service and 7,637 were added, making a net increase of 3,291 cars. There was a net increase in passenger equipment of 28 first class coaches, 14 second class and 10 immigrant cars. No parlour cars were added but 36 were retired and there was a net decrease of 13 sleeping cars; some of these parlour and sleeping cars were converted into coaches. Baggage, express and postal cars increased by 83 and there was a net increase of 69 in all passenger train cars. Including leased locomotives there was a net increase of 16 passenger, 35 freight, five switching and three electric switching, and the capacity of all locomotives owned by the railways increased by 2.3 per cent.

During the year 112 employees were killed in train accidents as against 103 in 1942. The number of passengers killed was reduced from 43 in 1942 to nine, and other persons killed amounted to 197, including 82 trespassers and 96 motorists, making a total of 318 deaths from train accidents. The persons injured in train accidents included 2,942 employees, 417 passengers and 586 other persons, making a total of 3,945 persons. This was an increase over 1942 of 779 employees and a decrease of 222 passengers and 42 other persons. During the war years the number of employees killed and injured has increased each year at a greater rate than the number of persons employed. The average for the four years 1940-43 was 88 employees killed and 1,985 injured as compared with the average for 1935-39 of 55 killed and 1,056 injured, and a total of 345 persons killed and 3,050 injured in 1940-43 as against 316 killed and 2,047 injured in 1935-39.

Coal Supplies of Canada in 1944

Production of coal in Canada during the calendar year 1944 amounted to 17,010,117 tons as compared with 17,859,057 in the preceding year, a decline of 848,940 tons or 4.8 per cent. During December 1944, the output totalled 1,524,220 tons as compared with 1,627,210 in December, 1943.

Imports of coal during 1944 advanced to 28,926,925 tons from the total for the preceding year of 28,852,654, while the exports declined to 1,010,240 tons from 1,110,101 in 1943. Imports in December 1944 were recorded at 1,430,470 tons as compared with 2,069,055 in December 1943, and the exports 81,493 tons as compared with 107,785.

Coke production in 1944 advanced to 4,001,000 tons from the 1943 total of 3,550,000 tons. During December 1944 the output totalled 330,000 tons as compared with 344,000 in December 1943.

Stocks and Marketings of Wheat and Coarse Grains

Stocks of Canadian wheat in store or in transit in North America at midnight on February 8 amounted to 368,014,958 bushels as compared with 344,435,378 on the corresponding date of last year. Stocks in Canadian positions on the latest date totalled 334,861,586 bushels, and in United States positions, 33,153,372 bushels.

Deliveries of wheat from farms in the Prairie Provinces during the week ending February 8 amounted to 3,184,677 bushels as compared with 5,414,276 in the preceding

week. During the elapsed portion of the present crop year 250,445,088 bushels were marketed as compared with 156,769,747 in the similar period of the preceding crop year.

The following quantities of coarse grains were also delivered from farms in the Prairie Provinces, totals for the preceding week being in brackets: oats, 3,313,439 (6,014,333) bushels; barley, 659,992 (1,271,429); rye, 48,922 (58,843); flaxseed, 12,800 (19,427).

Sales of Clay Products in November

Sales by producers of clay products made from domestic clays in Canada during November 1944 were valued at \$697,000 compared with \$741,000 in the preceding month and \$623,000 in November 1943. November sales included the following, totals for October being in brackets: building brick, \$344,910 (\$361,712); structural tile, \$86,462 (\$92,551); drain tile, \$49,599 (\$54,550); sewer pipe, \$90,364 (\$98,049); fireclay blocks and shapes, \$16,957 (\$19,693); pottery, \$68,185 (\$72,701).

Production of Carbonated Beverages in 1943

The value of soda water and other carbonated beverages produced in Canada in 1943 amounted to \$36,785,000 as compared with \$36,646,000 in the preceding year, and \$37,156,000 in 1941.

Reports Issued During the Week

1. The Aerated Waters Industry, 1943 (25 cents).
 2. Civil Aviation, October (10 cents).
 3. Car Loadings on Canadian Railways - Weekly (10 cents).
 4. Registration of Births, Deaths and Marriages, December (10 cents).
 5. Advance Report on the Fisheries of Quebec, 1943 (10 cents).
 6. Biscuit, Confectionery, Cocoa and Chocolate Industries, 1943 (25 cents).
 7. Canadian Grain Statistics - Weekly (10 cents).
 8. Coal and Coke Statistics, December (10 cents).
 9. Sand-Lime Brick Industry, 1943 (10 cents).
 10. Monthly Review of Business Statistics, January 1945 (10 cents).
 11. Statistics of Steam Railways, 1943 (50 cents).
 12. Canada's Domestic Exports by Principal Countries, January (10 cents).
 13. Summary of Canada's Domestic Exports, January (10 cents).
 14. Clay Products Made from Canadian Clays, November (10 cents).
 15. Stocks of Dairy and Poultry Products, February 1 (10 cents).
 16. Cold Storage Holdings of Meat and Lard, February 1 (10 cents).
 17. Stocks of Fruit and Vegetables, February 1 (10 cents).
 18. Cold Storage Holdings of Fish, February 1 (10 cents).
 19. Monthly Dairy Review of Canada, January (10 cents).
 20. Economic Conditions in Canada During 1944 (10 cents).
 21. Production of Canada's Leading Minerals, November (10 cents).
 22. Copper and Nickel Production, November (10 cents).
 23. Silver, Lead and Zinc Production, November (10 cents).
 24. Crop Reporting Program, 1945-46.
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