

WEEKLY BULLETIN

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Department of Trade and Commerce



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Productive Operations in February

Further decline was shown in the volume of production during the second month of the year. The reduction in the operations of a number of industries engaged mainly in war production was accentuated. The shortage of materials contingent upon the steel strike in the United States also contributed to the low level of operations. The index of the physical volume of business, which had been 195.4 in January, receded to 181.2 in the month under review.

The majority of the factors indicating the trend of mineral production showed increases in the latest month for which statistics are available, due allowances being made for seasonal tendencies. The output of coal showed an advance, the index moving up from 122.7 to 131.3. Gold receipts at the Mint were 228,564 fine ounces, showing an increase over the first month of the year after the usual adjustment. Considerable decline was recorded in the operations of the aluminum industry.

The index of manufacturing production receded from 202.8 to 197.9. The milling industry was slightly more active in the latest available month. Decline was shown in the manufacture of sugar in the second four-week period of the year. The tobacco index receded sharply in February. The release of cigarettes was 1,105 million against 1,491 million. The output of cigars rose from 17.9 million to 18.7 million. A decline was shown in the operations of the meat-packing industry, the slaughtering of the three main classes of live stock having receded to a lower position. Dairy products were lower in volume, although creamery butter showed a slight gain after seasonal adjustment. The general index for the textile industry was nearly maintained at 131.3 against 131.6. Considerable increase was recorded in the operation of the forestry industry. The output of newsprint at 308,382 tons showed an increase after the usual adjustment. Gains were recorded in the exports of wood pulp and shingles, while the outward shipments of planks and boards dropped to a lower position. An increase was shown in the amount of timber scaled in British Columbia after seasonal adjustment. Shipbuilding recorded further recession, while other industries in the secondary iron and steel group were more active.

The index of construction contracts awarded rose from 221 to 256 in the month under review. Building permits on the other hand showed decline from the high level of the preceding month. The index of electric power production rose about one point to 152.9. Decline was shown in both divisions of external trade. Retail sales were at a higher position in the latest available month, while distribution of wholesale outlets receded.

February Employment Situation

There was a further recession in industrial activity throughout Canada at the beginning of February, repeating the movement indicated at mid-winter in seven of the last eight years. Previously, employment had frequently, though not invariably, shown partial recovery at February 1 from the year-end lay-offs. The 15,612 firms in the eight leading industries furnishing information to the Dominion Bureau of Statistics at the date under review had a combined working force of 1,701,579 persons, as compared with 1,715,109 at January 1. This was a decline of 13,530 persons, or 0.8 per cent; the percentage loss coincided with that noted at February 1, 1945.

The index number of employment, based on the 1926 average as 100, fell from 168.2 at the first of January 1946, to 166.9 at February 1, when it was 6.7 per cent below that of 178.9 at the same date a year ago. This contraction did not conform to the seasonal movement at the beginning of February in the experience of the period, 1929-37, used in calculating the factors of seasonal variation, so that the seasonally-adjusted index was also reduced, falling from 174.8 at January 1 to 173.4 at the date under review.

The resumption of work on a more usual scale following the interruption occasioned by the year-end holidays resulted in a rise of 5.9 per cent in the amounts disbursed in weekly payrolls at the beginning of February. This increase was proportionately very similar to that of six per cent which had been indicated at February 1, 1945. The weekly salaries and wages paid at February 1 this year by the co-operating establishments totalled \$54,348,721, a sum which exceeded by \$3,026,840 the disbursements reported at January 1 for the holiday week.

Employment in manufacturing showed considerable recovery at the date under review, although the gain of some 12,700 persons, or 1.3 per cent from the preceding month was below the average at mid-winter in the years since 1920. On the other hand, the latest advance was rather larger than that at February 1 in either 1945 or 1944. Part of the increase indicated at the date under review was due to the re-employment of automotive workers who had been on strike for over three months, but very general improvement was shown in the many other branches of manufacturing, that in the textile division being most noteworthy. There were important seasonal losses in animal-food processing, and chemical factories also showed lowered activity.

Taken as a unit, the non-manufacturing industries reported curtailment, which in many groups was seasonal in character. The largest reductions were those of 6,860 persons in construction, and 16,668 in trade, in each of which the percentage decline was slightly below-average. The trend was also unfavourable in logging and transportation, while heightened activity was indicated in mining, communications and services. The advances were not pronounced.

World Wheat Situation

The over-all position with respect to wheat has varied little during the past month. Supplies to date have been coming forward more or less in accordance with past commitments. No change has been made in the estimate of the world's exportable surplus of 11 to 12 million long tons, but a recheck of deficit areas indicates that the estimate of requirements of over 17 million long tons quoted last month should be revised upward by at least 20 per cent. The failure of the Indian Monsoon, the droughts which struck France and North Africa, the lack of adequate fertilizer supplies and the dislocation occasioned by war took a terrible toll of food production in Europe, Asia and Africa last year. This, combined with below-average crops in three of the four large exporting countries, inevitably brought about the current shortage. The United States Department of Agriculture's Office of Foreign Agricultural Relations states that the 1945 world wheat production of 5,200 million bushels was the smallest since 1929 and eight per cent less than in 1944.

Further programs intended to reduce domestic consumption of foodstuffs, thereby providing additional exportable supplies, have been announced by both the Canadian and United States Governments. Canada hopes to increase her available exportable surplus by reducing the amount of wheat used by distillers and millers by encouraging conservation practices, and by offering certain concessions to farmers which will permit them to deliver their old wheat now and take cash settlement any time in 1946, 1947 or 1948. President Truman has established a Famine Emergency Committee to draw up recommendations and to institute programs designed to reduce appreciably the quantities of wheat, fats and oils used by householders and by hotels, restaurants and other members of the public feeding industry.

The United States Crop Reporting Board states in a release of March 20 on prospective plantings for 1946 that "farmers are responding to the currently heavy peacetime demands upon them and their farms in much the same manner that resulted in four successive seasons of heavy wartime production. An acreage of principal crops equaling the relatively high level of recent years will be planted this year if weather permits farmers to carry out their plans as reported in March to the Crop Reporting Board. Producers anticipate that they will have to contend with more than usual difficulty with respect to certain major factors essential to their operations, chiefly in the matter of adequacy of the supply of hired labour and new machinery for replacements".

In a report issued by the Argentine Ministry of Agriculture, the exportable wheat surplus, as of February 15, was placed at 69.7 million bushels. When compared with the January 15 estimate of 69.4 million bushels and an allowance made for 2.5 million bushels exported during that four-week period, it will be noted that an upward revision of nearly three million bushels was made.

As in the case of Argentina, Australian wheat prices to farmers may be a deciding factor in the acreage sown to wheat this year. The acreage goal has been set at 15.5 million acres, but private opinion doubts whether this can be achieved unless prices are raised substantially. Australian exports since the first of the year, have averaged nearly a million bushels a week, all to non-European destinations.

In their endeavour to prevent widespread starvation in Europe, Canada and the United States are exporting wheat as quickly as ocean and rail transport can be made available. So far, there has been no substantial assistance from Australia, Argentina, Russia, or the Balkans, and European supplies are running very short. It is reported

that Italy will add 20 per cent of oat flour to the standard bread flour and that Belgium is going to mix wheat and rye flour for breadmaking. France expects some wheat from Russia to help maintain her present bread ration until the home crops are harvested in August.

European crops of winter wheat appear much more favourable than they did a year ago. With larger acreages and some improvement in fertilizer supplies it is expected that the outturn may be considerably larger this year. Beneficial rains in the Mediterranean area have dispelled all fears of drought for this season and as these crops are harvested much earlier than in the more northern sections it should be possible to reduce shipments now being made to these areas before the end of June or July.

Dairy Production in February

Creamery butter production data for February reveal a situation even less satisfactory than that reported in the preceding month. The decline of 18 per cent in the February make, combined with a 15.6 per cent reduction in January, made it necessary to draw more heavily on storage stocks. Consequently, holdings dropped from approximately 36 million pounds on January 1 to less than 10 million pounds on March 1; and total supplies of creamery butter available for domestic consumption in February were nearly 10 million pounds less than those of the same month of the preceding year. In January the domestic disappearance of creamery butter amounted to 22.7 million pounds while in February it fell to 21.3 million pounds. The opposite situation is revealed in the average daily disappearance which advanced from 733 pounds in January to 762 pounds in February; and to continue on this basis for a 31-day period the disappearance would have exceeded that of January by well over three-quarters of a million pounds. The actual disappearance in February was approximately $1\frac{1}{2}$ million pounds greater than that of the same month last year.

The outlook for the future offers little opportunity for optimistic speculation. Milk production was approximately 926 million pounds for January, which represents a decline of three per cent as compared with the same month of 1945. A detailed examination of the various items which make up this production figure would indicate that the most significant decline occurred in the quantities of milk used for cheese making and for the manufacture of concentrated milk products, both being reduced 20 per cent as compared with the same month last year. Milk used for the production of creamery butter registered a reduction of only 16 per cent, but the latter is of greater relative importance, taking approximately one-quarter of the milk supply as compared with only five per cent used for the two products just mentioned. The total used in all factory products, showed a decline of 18 per cent below that of January 1945. Fluid sales, on the other hand, advanced from 337 million pounds in January 1945 to 359 million pounds in the same month of 1946, an increase of seven per cent. Notwithstanding the scarcity of butter and the high prices offered for dairy products, farmers appear to be using greater quantities of milk and cream for home consumption. This development began during the latter part of 1945, and in January 1946 an increase of three per cent was indicated.

Production of creamery butter in February was recorded at 8,632,000 pounds as compared with 10,559,000 in the corresponding month of last year, and in the first two months of the year, 18,271,000 pounds as compared with 21,981,000. February cheese make was 1,294,000 pounds as compared with 2,037,000, and in the cumulative period, 3,139,000 pounds as compared with 4,594,000. February output of concentrated milk products amounted to 11,590,000 pounds as compared with 12,635,000, and in the two months, January and February, 23,565,000 pounds were produced as compared with 27,256,000.

Stocks of Butter, Cheese and Eggs

Stocks of Canadian butter in nine of the principal cities of Canada at the opening of business on April 1 amounted to 1,894,659 pounds as compared with 5,569,156 pounds on March 1, and 6,280,256 pounds on April 1, 1945, according to figures released by the Dominion Bureau of Statistics. April 1 holdings of cheese totalled 11,803,560 pounds as compared with 14,235,418 pounds on March 1, and 12,022,654 pounds on April 1, 1945.

Stocks of cold storage eggs in the principal cities on April 1 were recorded at 1,284,375 dozen as compared with 416,550 dozen on March 1, and 1,097,074 dozen on April 1, 1945. Holdings of fresh eggs amounted to 1,469,974 dozen as compared with 913,094 dozen on March 1, while the stocks of frozen egg meats amounted to 3,124,585 pounds as compared with 3,750,345 pounds on March 1, and 7,404,996 pounds on April 1, 1945.

Cost-of-Living Index for March 1

The Dominion Bureau of Statistics cost-of-living index, on the base 1935-1939=100, advanced from 119.9 for February 1 to 120.1 for March 1, 1946. The increase since August 1939 was 19.1 per cent. Although foods contributed the major part of the rise over February 1, clothing, homefurnishings and services, and fuel also registered moderate increases.

The food index moved up from 132.5 in February to 133.1 for March, as increases were recorded for vegetables, eggs, and dairy products. Clothing advanced from 122.7 to 123.1, and homefurnishings and services from 120.1 to 120.4. The fuel and light index moved up from 107.1 to 107.2, while two groups were unchanged, rentals at 112.3, and miscellaneous items at 110.9.

External Trade of Canada in February

The external trade of Canada, excluding gold, was valued at \$271,731,000 in February as compared with \$352,736,000 in the corresponding month of last year, a decrease of 33 per cent, according to figures released by the Dominion Bureau of Statistics. The decline in total trade was due to the sharp curtailment in the export movement of war supplies. For the first two months of the current year, external trade aggregated \$603,384,000 as compared with \$716,282,000 in the similar period of 1945.

The merchandise export trade of Canada in February was valued at \$153,143,000 as compared with \$236,364,000 in February 1945, a decline of 35 per cent. The figures reflect the continued reduction in the export of war supplies. In February last year the export of war materials amounted to \$120,850,000, whereas in February this year, exports in this category amounted to only \$134,000. Exports of non-war commodities advanced from \$115,514,000 in February 1945 to \$153,009,000, or by 33 per cent.

An advance was recorded in the value of merchandise imported in February, the total standing at \$116,996,000 as compared with \$112,373,000 in February 1945, while the total for the first two months of the year rose to \$257,306,000 from \$242,058,000 a year ago.

February exports of foreign commodities amounted to \$1,591,000 as compared with \$3,998,000 in February, 1945. The January-February total was \$3,845,000 as compared with \$7,362,000 in the like period of 1945.

Canada's Merchandise Imports in February

Canada's merchandise imports in February were valued at \$116,996,000 as compared with \$112,373,000 in February 1945, according to figures released by the Dominion Bureau of Statistics. The total for the first two months of the current year was \$257,306,000 as compared with \$242,058,000 in the similar period of 1945. Commodity imports from the United States, the principal source of supply, were valued at \$86,046,000 in February as compared with \$92,805,000 in February 1945, while the total from the United Kingdom was \$12,994,000 as compared with \$6,741,000.

Commodity imports from Mexico in February were valued at \$1,724,000 as compared with \$1,065,000 in the corresponding month of last year, Australia \$1,272,000 as compared with \$467,000, Venezuela \$1,207,000 as compared with \$1,086,000, Jamaica \$1,135,000 as compared with \$211,000, Honduras \$982,000 as compared with \$382,000, New Zealand \$909,000 as compared with \$81,000, Brazil \$876,000 as compared with \$295,000, British South Africa \$814,000 as compared with \$594,000, British India \$745,000 as compared with \$1,363,000, Newfoundland \$649,000 as compared with \$359,000, and Colombia \$671,000 as compared with \$539,000.

Output of Central Electric Stations

Central electric stations produced 3,183,011,000 kilowatt hours during February as compared with 3,124,235,000 in the corresponding month of last year, according to figures released by the Dominion Bureau of Statistics. Output of primary power was reduced from 2,645,482,000 to 2,594,679,000 kilowatt hours, but secondary power was increased from 478,753,000 to 588,332,000 kilowatt hours.

Consumption of primary power, including all line losses, was recorded at 2,488,479,000 kilowatt hours in February as compared with 2,534,835,000 in February last year.

Exports to the United States increased from 152,659,000 kilowatt hours in February 1945 to 178,661,000, primary declining from 110,647,000 to 106,200,000 kilowatt hours, and secondary increasing from 42,012,000 to 72,461,000 kilowatt hours.

Building Permits in February

Building permits issued by municipalities which reported to the Dominion Bureau of Statistics reached the value of \$16,156,047 in February, exceeding the February 1945 total of \$7,224,439 by 124 per cent. Permits for new construction were issued in February to the value of \$12,608,713 and additions, alterations and repairs, \$3,547,-334. For the first two months of the current year, permits were granted to the value of \$31,408,395 as compared with \$12,618,666 in the comparable period of 1945, an advance of 149 per cent.

New housing units represented in the building permits issued in February by the reporting municipalities numbered 1,903, of which 1,682 were new buildings and 221 were conversions. In February last year, 1,099 permits were issued for housing units, including 834 for the construction of new buildings and 265 for conversions. The aggregate value of new residential buildings, additions and repairs thereto, was \$7,819,812 in February this year as compared with \$3,449,565 in February, 1945.

Permits for the construction of 3,918 new dwelling units were granted during the first two months of the present year as compared with 1,905 in the same period of 1945. The permits for 1946 included 3,445 for new buildings and 473 conversions. The value of new residential buildings, and additions and repairs thereto amounted to \$16,004,-749 during the first two months of this year as compared with \$5,850,257 in the same period of 1945.

Sales of Manufactured and Natural Gas

Sales of manufactured gas by distributing companies totalled 2,284,081 M cubic feet during January as compared with 2,211,808 M cubic feet in the corresponding month of last year, according to figures released by the Dominion Bureau of Statistics. January sales of natural gas amounted to 4,561,350 M cubic feet as compared with 4,474,170 M cubic feet a year ago.

Shipments of Steel Wire in January

Shipments of steel wire by Canadian producers amounted to 9,883 tons during January 1946, including 6,612 tons of plain wire, 1,955 tons of galvanized wire, 314 tons of other coated wire, and 1,002 tons of barbed wire, according to figures issued by the Dominion Bureau of Statistics.

Production of Rock Wool

Rock wool production in February included 44,975 square feet of four-inch batts, 1,017,940 square feet of three-inch batts, 2,142,430 square feet of two-inch batts, 249,140 square feet of one-inch batts, 436,790 cubic feet of granulated wool, 68,058 cubic feet of bulk or loose wool and 59,786 cubic feet of industrial wool. Imports of rock wool in February totalled 887,104 pounds valued at \$32,840, and imports of glass wool were valued at \$28,102.

January Production of Wire Fencing

Production of steel wire fencing in January totalled 2,385 tons, including 2,231 tons of farm fencing, 17 tons of lawn fencing and 137 tons of woven chain link fabric, according to figures released by the Dominion Bureau of Statistics. During the calendar year 1945, 23,451 tons of farm woven wire and lawn fencing were produced.

Production of Nails, Tacks and Staples

January production of iron and steel wire nails was recorded at 6,394 tons, while the total output for the calendar year 1945 was 70,021 tons, according to figures released by the Dominion Bureau of Statistics. Production of iron and steel cut nails in January totalled 82 tons, steel wire staples 126 tons, and tacks of steel, brass and copper 202 tons.

February Output of Gypsum Products

Production of gypsum wallboard in February was recorded at 13,436,366 square feet as compared with 13,146,748 in the preceding month, according to figures released by the Dominion Bureau of Statistics. Output of gypsum lath amounted to 6,782,138 square feet as compared with 6,888,806, and gypsum plasters 6,341 tons as compared with 6,684 tons.

Production of Automobiles

February production of passenger cars increased to 2,922 units from the previous month's total of 1,391, according to figures released by the Dominion Bureau of Statistics. Of the February output, 2,270 were 4-door closed models, 533 were 2-door closed models, and 119 were coupes. Production of commercial cars, including trucks, buses, chassis and military vehicles totalled 4,562 units as compared with 7,104 in January. Output of all types of motor vehicles in February was 7,484 units as compared with 8,495 in January and 13,090 in February, 1945.

Production of Asphalt Roofing

Production of asphalt roofing materials in February included 323,820 squares of shingles and rolled roofing and 3,280 tons of felts and sheathing as compared with 315,525 squares of the former and 3,573 tons of the latter in February 1945, according to figures released by the Dominion Bureau of Statistics. Domestic sales in February included 294,200 squares of shingles and rolled roofing as compared with 258,695, and of felts and sheathing 3,220 tons as compared with 3,111.

Production of Domestic Washing Machines

Production of domestic type washing machines in January amounted to 8,942 units, including 7,722 electric, 468 gasoline and 752 hand-operated models, according to figures released by the Dominion Bureau of Statistics. Monthly production figures for earlier years were not compiled by the Bureau, but on the basis of annual totals the January 1946 output would appear to be running close to the average output recorded in pre-war months.

Production of domestic type washing machines was under strict government control during the war years with the result that the annual output declined from 128,262 units in 1941 to 13,200 units in 1943 -- the lowest level in years. With the relaxation of restrictions, however, production again advanced, rising to 34,934 units in 1944 and 59,396 in 1945.

The curtailment during the war was especially noticeable in the production of electric and gasoline-operated types. Output of electric models fell from 104,583 in 1941 to 5,373 in 1943, but by the end of 1945 the total had risen again to 44,408. Production of gasoline-operated models, which had been 13,697 units in 1941, almost ceased in 1943, but in 1945 output advanced to 5,267 units. Production of hand-operated models, although reduced during the war years was not affected to the same extent as the other types, declining only from 9,992 in 1941 to a low of 7,789 in 1943.

Imports in 1945 of electric washing machines and parts were valued at \$140,000, and imports of types other than electric totalled \$1,200. Exports of domestic washing machines and parts were appraised at \$176,000 compared with \$33,000 in 1944 and \$6,000 in 1943.

Indexes of Country General Store Sales

February sales of country general stores were practically unchanged from January and were 10 per cent higher than in February a year ago, according to figures released by the Dominion Bureau of Statistics. Cumulative sales for the first two months of 1946 stand 9.3 per cent above the similar two-month period of 1945. Unadjusted indexes of sales, on the base, 1935-1939=100, stood at 139.8 for February, 138.1 for January, and 127.3 for February, 1945.

Civil Aviation in December

Civil air carriers transported 44,135 revenue passengers in December 1945 as compared with 28,815 in December 1944, an increase of 57 per cent, according to figures released by the Dominion Bureau of Statistics. Traffic on international routes increased from 11,671 to 17,033, or by 46 per cent, and on Canadian routes from 17,144 to 27,091 passengers, or by 58 per cent. Revenue passenger miles flown on Canadian routes increased from 6,996,486 to 9,376,044, or by 34 per cent. Freight increased from 635,004 to 1,065,847 pounds, but mail decreased from 641,926 to 567,724 pounds. Revenues of Canadian carriers increased from \$1,390,423 to \$1,412,595 and operating expenses increased from \$745,149 to \$1,311,595, reducing the net operating revenue from \$645,274 to \$101,000.

Car Loadings on Canadian Railways

Car loadings on Canadian railways for the week ended March 23 amounted to 71,104 cars as compared with 71,372 cars for the previous week and 67,270 cars for the corresponding week last year. Total loadings in the eastern division increased from 46,067 cars in 1945 to 47,123 cars, and in the western division from 21,203 to 23,981 cars.

Reports Issued During the Week

1. Car Loadings on Canadian Railways - Weekly (10 cents).
2. Transit Report, November (10 cents).
3. Indexes of Country General Store Sales, February (10 cents).
4. Domestic Washing Machines, 1945 (25 cents).
5. Civil Aviation, December (10 cents).
6. Central Electric Stations, February (10 cents).
7. Trade of Canada, February (10 cents).
8. Summary of Canada's Imports for Consumption, February (10 cents).
9. Imports Into Canada for Consumption, by Countries, February (10 cents).
10. Building Permits, February (10 cents).
11. Dairy Production, February (10 cents).
12. Price Movements, March (10 cents).
13. Prices and Price Indexes, February (10 cents).
14. Rock Wool, February (10 cents).
15. Wire Fencing, January (10 cents).
16. Nails, Tacks and Staples, January (10 cents).
17. Steel Wire, January (10 cents).
18. Sales of Manufactured and Natural Gas, January (10 cents).
19. Production of Automobiles, January (10 cents).
20. Monthly Report on Gypsum Products, February (10 cents).
21. Monthly Review of the Wheat Situation (10 cents).
22. February Employment Situation (10 cents).
23. Asphalt Roofing Industry, February (10 cents).
24. Advance Preliminary Statement of Stocks of Canadian Butter, Cheese and Eggs in the Principal Cities of Canada, April 1 (10 cents).



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