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Economic Conditions in March

The volume of productive operations according to preliminary calculations rose to a higher level in March than in the preceding month, due allowances being made for seasonal variation. The index of the physical volume of business was 181.2 in February, and it appears that the downward trend in evidence since the early months of 1944 was reversed in the third month of the year.

Inspected slaughterings recorded a decline from March 1945 in two of the main divisions. The number of sheep and lambs increased 58 per cent, while declines in cattle and hogs were 7.4 per cent and 30.2 per cent, respectively. The exports of copper recorded an increase of 3.7 per cent in March over the same month of last year. The outward movements of nickel and zinc were at a comparatively lower level.

Minor increase was shown in cotton consumption by the textile industry in March over the same month of last year. The increase was from 14,988,000 pounds to 15,080,000. The dairy industry was less active than in the same month of 1945. The decline in the output of factory cheese was 28.8 per cent, while the output of creamery butter was 18.7 per cent loss.

A marked increase was recorded in the production of newsprint over the same period of last year. The tonnage was 26.7 per cent greater at 334,127. Moderate declines were shown in the outward shipments of wood pulp, planks and boards, and shingles. The index of the cost of living on the base of 1935-1939 was 120.1 in March against 118.7 in March last year, an increase of 1.2 per cent.

Bank deposits during the same period recorded a gain of 16 per cent, the index rising from 215.5 to 250.2. Bank debits or cheques cashed against individual accounts in clearing centres rose 6.6 per cent to 5.7 billion dollars.

Business Operations in March Compared with February and March, 1945

		March 1946	February 1946	March 1945
Index of Physical Volume of Business	1935-1939=100	*	181.2	225.2
Cotton Consumption	lb.	15,079,767	14,258,465	14,987,978
Cheese, Factory Production	lb.	2,513,329	1,294,371	3,532,325
Butter, Creamery Production	lb.	11,813,174	8,631,597	14,524,825
Newsprint Production	tons	334,127	308,382	263,776
Inspected Slaughterings				
Cattle and Calves	no.	183,538	152,523	198,137
Sheep and Lambs	no.	71,369	61,854	45,158
Hogs	no.	419,451	373,681	601,317
Exports				
Copper	cwt.	277,958	176,376	268,160
Nickel	cwt.	180,953	93,838	254,201
Zinc	cwt.	399,063	353,011	550,965
Canned Salmon	cwt.	55,421	70,597	14,609
Wood Pulp	cwt.	2,304,947	2,426,209	2,616,523
Planks and Boards	M ft.	151,237	127,444	154,749
Shingles	squares	143,694	148,171	165,548
Cost of Living	1935-1939=100	120.1	119.9	118.7
Bank Deposits	1935-1939=100	250.2	249.4	215.5
Bank Debits	\$000	5,678,171	5,335,919	5,328,959

* According to preliminary calculations, the index of the physical volume of business showed an increase over February.

National Accounts, Income and Expenditure, 1938-1945

A booklet entitled "National Accounts, Income and Expenditure, 1938-1945" has been released by the Dominion Bureau of Statistics. This is the second edition of a study prepared in limited quantity for the Dominion-Provincial Conference on Reconstruction held in November, 1945. Minor revisions have been made since that date. From now on, the Bureau will publish regular reports in this field.

The principal tables of the report present gross national product and gross national expenditure in the form of balancing accounts. The totals for the years 1938-1945 are summarized as follows, in millions of dollars: 1945 (preliminary), \$11,359; 1944, \$11,771; 1943, \$11,124; 1942, \$10,296; 1941, \$8,335; 1940, \$6,628; 1939, \$5,495; 1938, \$5,075.

Gross national product and gross national expenditure measure the same total in two different ways. The former is defined as the value of all final goods and services produced in a given year measured by analysis of the costs involved in production. Gross national expenditure, on the other hand, is defined as the value of all final goods and services measured by analysis of sales of these goods and services to all sections of the community. Both sides of these balancing accounts have been estimated independently and in detail, and represent a large scale statistical undertaking. It is interesting to note what a small discrepancy remains as a balancing item between the two sides, amounting to a maximum of $3\frac{1}{2}$ per cent of the total in the year 1944 and practically disappearing in some of the other years.

The principal part of gross national product is the net national income at factor cost. In non-technical terms, it is the income earned by persons in productive pursuits, whether their services are rendered to business firms, to government, or directly to the consuming public. Net national income at factor cost is shown to have increased steadily from a level of \$3,940 million in 1938 to \$9,685 million in 1944, followed by a slight recession in the total for 1945.

Other tables are published, including personal income payments for Canada, salaries and wages broken down by provinces, and net income of individual enterprise by provinces.

A detailed statement is presented of the economic concepts which are involved, and the methods of estimation are summarized in the book. As quickly as time and resources permit, additional overall tables will be published, together with more detailed statements regarding the various items which are estimated.

A special study of distribution of income recipients and aggregate income by income classes for Canada and four groups of provinces in 1942, excluding agriculture, is reprinted as an appendix. These materials were prepared for the Dept. of Finance.

World Price Movements

World wholesale price index numbers in the second half of 1945 showed fairly numerous declines, ranging from less than one per cent to four per cent, according to figures released by the Dominion Bureau of Statistics. The number of increases recorded was not preponderant as has been the case usually during the past six years. Price series for Canada and the United States recorded fractional percentage gains, 0.1 and 0.9, respectively, between June and December, 1945. Mexico was exceptional in the western hemisphere with a rise of 9.5 per cent between June and December.

Among European countries wholesale price indexes showed varying trends. Series for the United Kingdom, Switzerland, Sweden, Denmark and Norway moved down in the second half of 1945; with the exception of the United Kingdom all recorded net declines for the year. The Bulgarian index which had increased by 30 per cent in the first half of 1945, advanced only three per cent between June and December. Index numbers for France and Finland, on the other hand, continued to show substantial gains. A provisional index for France, based on regulated wholesale prices, rose 13 per cent between June and September, 1945. This increase was moderate, however, compared with a 39 per cent rise in the previous quarter. The wholesale index for Finland, showing an accelerated rate of increase in the second half of the year, rose 56 per cent from June to November.

Small changes continued to be the rule among cost-of-living series. Declines of less than two per cent from June to December 1945, were recorded by series for Newfoundland, New Zealand, South Africa, Switzerland and the United Kingdom. Increases ranged from fractional percentage gains for Australia, Canada and the United States, to net gains of three to four per cent for Argentina, Peru, and Iceland. Beyond these limits, Mexico showed a June-December rise of 11 per cent, and Finland an advance of 67 per cent between June and December, 1945. The cost-of-living index for Bulgaria was down six per cent in December from the June 1945 peak of 575.

Canada's Merchandise Export Trade in March

Canada's domestic merchandise exports in March continued at the lower level of recent months, being valued at \$178,377,000 as compared with \$301,175,000 a year ago, according to figures released by the Dominion Bureau of Statistics. The decrease was due to the virtual disappearance of shipments abroad of war materials and equipment, as reflected especially in the totals for the iron, non-ferrous metals, and miscellaneous groups of commodities. Advances, on the other hand, were recorded in agricultural and vegetable products, and wood and paper products. The same general picture was presented by first-quarter totals, which this year amounted to \$520,610,000 as compared with \$768,037,000 in the three months ended March, 1945.

Sharp reductions were recorded in the value of merchandise exported in March to the United States, the United Kingdom and British India, while exports to countries of Continental Europe, including France, Belgium, Netherlands, Norway, Poland, Portugal, were considerably higher. Increases also were shown in the exports to almost all countries of South America.

March exports to the United States were valued at \$66,465,089 as compared with \$103,343,683 in the corresponding month of last year, while the total for the first three months of this year stood at \$186,350,746 as compared with \$279,564,495. Commodity exports to the United Kingdom in March amounted to \$50,549,374 as compared with \$108,801,612, and in the first quarter \$139,582,503 as compared with \$259,482,839. Exports to British India in March totalled \$4,819,005 as compared with \$31,929,962, and in the first three months of this year \$20,568,197 as compared with \$72,032,526.

Merchandise exported to Belgium in March was valued at \$5,923,824 compared with \$717,834 in March last year, to France \$8,743,012 compared with \$6,380,367, French Africa \$3,256,672 compared with \$1,706,992, Netherlands \$3,160,562 compared with \$214,256, Norway \$3,032,897 compared with nil, Poland \$1,083,021 compared with \$827,203, Portugal \$282,974 compared with \$22,059, and China \$2,041,830 compared with \$16,818.

Exports in March to Argentina were valued at \$1,174,856 compared with \$486,785 a year ago, Brazil \$1,324,485 compared with \$723,096, Venezuela \$837,039 as compared with \$404,033, Mexico \$793,103 compared with \$680,221, Chile \$327,234 compared with \$216,118, Colombia \$429,775 compared with \$411,219, South Africa \$4,137,340 compared with \$2,956,328, Australia \$2,438,816 compared with \$581,220, New Zealand \$926,657 compared with \$866,674, and Newfoundland \$2,102,982 compared with \$2,971,866.

Exports of Agricultural and vegetable products advanced to \$47,703,000 in March this year from \$41,949,000 a year ago. Wheat exports were almost twice as heavy, the total being \$24,078,000 compared with \$12,971,000; wheat flour advanced slightly to \$8,252,000 from \$8,188,000. Meats fell to \$12,598,000 from \$21,761,000, while fish and fishery products advanced to \$6,830,000 from \$5,447,000. In the wood and paper group, newsprint paper exports rose to \$19,527,000 from \$14,125,000, planks and boards to \$7,824,000 from \$7,467,000, while wood pulp fell to \$8,660,000 from \$9,845,000.

Exports in the iron and its products group moved sharply lower in March, dropping to \$18,167,000 from \$67,620,000, due chiefly to the decline in automobiles and parts to \$7,558,000 from \$41,634,000. Exports of non-ferrous metals and their products as a group were reduced to \$13,379,000 from \$40,356,000, due mainly to decreases in aluminum, brass, nickel, and electrical apparatus. Chemicals and allied products also fell to \$5,634,000 from \$12,924,000.

January Gold Production.

Canada's gold production during January totalled 238,450 fine ounces as compared with 239,749 fine ounces in December, 1945, and 233,210 fine ounces in January, 1945, according to figures released by the Dominion Bureau of Statistics. Value of the January, 1946, output was \$9,130,325.

Output by provinces in January (figures for January, 1945, in brackets) was as follows: Nova Scotia, 439 fine ounces (654); Quebec, 56,042 (59,836); Ontario, 147,303 (141,063); Manitoba and Saskatchewan, 16,120 (13,847); British Columbia, 15,903 (17,810) fine ounces. Production of 307 fine ounces from the Yukon and 1,456 for the Northwest Territories was also recorded.

Production of Automobilos in March

Production of motor vehicles in Canada in March numbered 11,373 units as compared with 7,484 in the preceding month and 14,912 in the corresponding month of last year, according to figures released by the Dominion Bureau of Statistics. The output for March this year included 5,039 passenger automobiles and 6,334 commercial vehicles. Of the passenger cars produced, 3,982 were made for sale in Canada and 1,057 were for export, while in the commercial vehicle class, 2,890 were made for sale in Canada and 3,444 were for export.

During the first three months of the current year, 27,352 motor vehicles were produced as compared with 41,747 in the corresponding period of last year. Passenger car output for the first quarter of this year was recorded at 9,352 units, of which 8,284 were made for sale in Canada, and 1,068 were for export. First quarter output of commercial vehicles amounted to 18,000 units, including 6,643 units intended for sale in Canada and 11,357 units for the export market.

Financing of Motor Vehicle Sales in March

Expansion in the financing of motor vehicle sales was recorded in March when 4,092 new and used vehicles were financed to the extent of \$2,565,034, an advance of 68 per cent in number and slightly more than double the amount of financing in March 1945 when 2,441 vehicles were financed for \$1,273,867. Growth in new vehicle financing continued to exceed the rate of increase for used vehicles, 1,235 transactions involving new vehicles, whereas only 257 new units were financed in March, 1945. The financed value of the vehicles was \$1,440,618 as compared with \$376,630.

Used vehicles financed in March numbered 2,857, being 31 per cent more than the 2,184 units financed in March of last year. Corresponding amounts of financing were \$1,124,416 in March 1946 and \$897,187 in the same month of 1945, an increase of 25 per cent. An increase of 163 per cent in the Maritime Provinces reflects the low degree of activity in March a year ago in that region of the country. Increases in Quebec, Ontario and Alberta were grouped about the average increase for the country as a whole, while more moderate advances occurred in the combined totals for Manitoba and Saskatchewan and also in British Columbia.

Sales of Radio Receiving Sets in January

Indicative of the resumption of production for civilian use, sales of radio receiving sets by Canadian producers totalled 31,659 units in January as compared with sales of 44,343 units in the twelve months of 1945, 595 in 1944, 22,201 in 1943 and 209,163 in 1942, when the manufacture of civilian sets was discontinued for the duration of the war, according to figures released by the Dominion Bureau of Statistics. Value of the January sales at list prices was \$1,061,125.

Standard electric table models formed 23,757, or about 75 per cent of the total January sales; short-wave table models, 3,588; standard battery table models, 2,795; portable battery sets, 1,369; short-wave console models, 143; and standard and short-wave combinations, seven. The distribution of sales in January, by provinces, was as follows: Ontario, 13,767 units; Quebec, 5,615; British Columbia, 3,275; Maritimes, 3,030; Manitoba, 2,432; Alberta, 1,994; and Saskatchewan, 1,546 units.

Domestic Washing Machines

Production of domestic-type washing machines during February amounted to 9,515 units, consisting of 8,129 electric, 555 gasoline, and 831 hand-operated machines, according to figures released by the Dominion Bureau of Statistics. The February output compares with 8,942 units for January, making a total production for the two months of 18,457 units, comprising 15,851 electric, 1,023 gasoline and 1,583 hand-operated machines. Imports of domestic washing machines totalled 509 units during February and 1,134 during the two months, while exports numbered 318 and 474 units, respectively.

Births, Deaths and Marriages in Second Quarter of 1945

Live births registered in Canada during the second quarter of 1945 numbered 73,042 (preliminary figures) giving an equivalent annual rate of 24.2 per 1,000 population as compared with 76,041 births and a rate of 25.5 for the second quarter of 1944, according to figures released by the Dominion Bureau of Statistics. Deaths totalled 28,288 with a rate of 9.4 per 1,000 population as compared with 29,320 and a rate of 9.8. Deaths under one year of age numbered 3,676 and the infant mortality rate was 50 per 1,000 live births as compared with 4,007 deaths and a rate of 53 for the corresponding period of 1944. The natural increase for the quarter was 44,754 giving a rate of 14.8 per 1,000 population as against 46,721 and a rate of 15.7. There were 28,661 marriages during the quarter as against 28,986.

For the first six months of 1945 the comparative figures are as follows (figures for the corresponding period of 1944 in parentheses: live births, 142,810 (145,898); birth rate, 23.8 (24.5); illegitimate births, 6,581 (6,696); percent of total live births, 4.6 (4.5); stillbirths, 3,328 (3,500); rate per 1,000 live births, 23.3 (24.6); deaths, 57,660 (60,667); death rate, 9.6 (10.2); natural increase, 85,150 (85,231); rate of natural increase, 14.2 (14.3); deaths under one year, 7,759 (7,962); rate per 1,000 live births, 54 (55); maternal deaths, 355 (412); rate per 1,000 live births, 2.5 (2.8); marriages, 42,931 (44,293); marriage rate, 7.2 (7.4).

Traffic on Transit Systems in December

Urban electric railways and bus systems carried 133,076,535 passengers during December, 1945, as compared with 129,224,346 in December, 1944, according to figures released by the Dominion Bureau of Statistics. Electric cars carried 71.6 per cent of the total, motor buses of street railway systems and of motor bus systems carried 26.8 per cent, trolley buses 1.6 per cent, and less than one-tenth of one per cent were carried in chartered service.

Interurban transit systems carried 8,782,070 passengers as compared with 7,484,400 in December, 1944. Over 75 per cent of these travelled in motor buses in regular service, and the remainder in interurban electric railway cars and in vehicles in chartered service. Interurban traffic was 17.4 per cent heavier in December than in 1944, and the vehicle miles increased by 19.8 per cent. On urban systems the increase in traffic was three per cent for an increase in vehicle miles of 4.3 per cent.

Warehousing in Canada in 1944

Total revenues in 1944 of 133 warehousing establishments which reported their activities to the Dominion Bureau of Statistics amounted to \$14,543,355, of which \$6,631,069 or 45.6 per cent was derived from storage, \$875,525 or six per cent from handling and extra labour services, \$1,488,024 or 10.2 per cent for miscellaneous services, and the remaining \$5,548,737 or 38.2 per cent was derived from cartage, moving and office rentals. Operating expenses amounted to \$11,874,163, of which \$4,205,906 or 35.4 per cent was for wages and bonuses to warehousemen, drivers and helpers. The net occupiable space for household goods was 1,884,625 square feet or 37 per cent of the total dry storage space. The cold storage space amounted to 12,437,270 cubic feet.

Jewellery and Silverware Industry in 1944

Manufacturers of jewellery, silverware, and other precious metal products reported the value of their 1944 production at \$26,664,087, which was 11.5 per cent over the total of \$23,913,367 for 1943, and was more than double the 1938 valuation of \$13,374,183, according to figures released by the Dominion Bureau of Statistics. Production of jewellery in 1944 was valued at \$8,038,411 as compared with \$6,613,107 in the preceding year, and \$3,301,364 in 1938, flatware \$2,220,323 compared with \$1,552,564 in 1943, hollow-ware \$713,396 compared with \$945,019, and clocks and watches \$1,046,416 compared with \$715,384.

Rubber Industry of Canada in 1944

The value of production in the Canadian rubber industry in 1944 was \$169,511,036, an advance of \$39,353,256 over the preceding year, according to figures released by the Dominion Bureau of Statistics. There was an increase in the selling value of tires and inner tubes, the value of production rising from \$64,720,133 in 1943 to \$70,521,791 in 1944. The volume of footwear also increased from 11,984,908 pairs in 1943 to 14,038,409 pairs in 1944 with a corresponding increase in value from \$14,495,794 to \$17,717,137. Rubber heels and soles, rubber belting and hose, medical and druggists' supplies, mechanical rubber goods, synthetic rubber, etc., increased in value from \$50,941,853 to \$81,272,108.

Of the three main classes of products manufactured in the rubber industry in 1944, rubber tires and tubes accounted for \$70,521,791 or almost 42 per cent of the total, rubber footwear for \$17,717,137 or over 10 per cent, and other rubber goods for the balance of \$81,272,108 or 48 per cent. Compared with the preceding year the output of rubber tires and tubes increased in value by \$5,801,658 or nine per cent, rubber footwear advanced by \$3,221,343 or over 22 per cent, and other rubber goods by \$30,330,255 or almost 60 per cent, due mainly to the inclusion of synthetic rubber.

The consumption of synthetic rubber in 1944 amounted to 55,465,182 pounds, including 51,629,539 pounds of Buna-S, 1,660,281 of Butyl, and 2,175,362 pounds of other types. The total used in the manufacture of tires and tubes in 1944 was 43,085,047 pounds.

Fur Farms in Prairie Provinces and British Columbia in 1944

Revenues of fur farms in the Prairie Provinces and British Columbia from the sale of live fur bearing animals and pelts was \$3,966,395 in 1944 as compared with \$3,844,995 in 1943, an increase of 3.2 per cent, according to figures released by the Dominion Bureau of Statistics. The sale of pelts amounted to \$3,534,075, or 89 per cent of the total, showing a slight decline from the figure of \$3,610,125 for 1943, while the sale of live animals at \$432,320 (11 per cent of the total) compared with \$234,870 for 1943. There was a decline in the number of pelts sold and an increase in the number of live animals, higher prices obtaining for most kinds.

Reports Issued During the Week

1. The Inks Industry, 1944 (15 cents).
 2. Advance Report on the Fur Farms of the Prairie Provinces and British Columbia, 1944 (10 cents).
 3. Gold Production, January (10 cents).
 4. Canada's Domestic Exports by Countries, Excluding Gold, March (10 cents).
 5. Summary of Canada's Domestic Exports, Excluding Gold, March (10 cents).
 6. Monthly Review of Business Statistics, March (10 cents).
 7. National Accounts, Income and Expenditure, 1938-1945 (50 cents).
 8. Factory Sales of Electric Storage Batteries, Fourth Quarter, 1945 (10 cents).
 9. Births, Deaths and Marriages in Second Quarter of 1945 (25 cents).
 10. Sand and Gravel Industry, 1944 (25 cents).
 11. Warehousing, 1944 (25 cents).
 12. Transit Report, December (10 cents).
 13. World Price Movements (25 cents).
 14. Jewellery and Silverware Industry, 1944 (15 cents).
 15. Oiled and Waterproofed Clothing Industry, 1944 (15 cents).
 16. Rubber Industry of Canada, 1944 (25 cents).
 17. Nails, Tacks and Staples, February (10 cents).
 18. Radio Receiving Sets, January (10 cents).
 19. Financing of Motor Vehicle Sales, March (10 cents).
 20. Fertilizer Manufacturing Industry, 1944 (15 cents).
 21. Aerated Waters Industry, 1944 (15 cents).
 22. Steel Ingots, March (10 cents).
 23. Automobile Production, March (10 cents).
 24. Domestic Washing Machines, February (10 cents).
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