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Crop Conditions in Canada

Generally fair to good conditions have been maintained in the Prairie Provinces over the past week with timely rains falling in many areas where relief was urgently required. Average precipitation since April 1 as compared with normal has improved in all provinces, while temperatures for the week ranged from 3 to 8 degrees below normal. Moderate rainfall and good growing weather over the next four weeks should assure at least an average crop in western Canada this season.

In Manitoba most early-seeded crops have now headed but general rains are required soon. The corn crop is slow and sunflowers are only fair. The outlook for sugar beets and pastures is improved but the hay crop will evidently be light. Hail-storms have occurred in one or two local areas. No further insect infestations have been reported this past week.

Fairly good general rains, particularly in the southern and western districts of Saskatchewan have improved top-soil moisture conditions. Early-sown crops in south-central and southwestern portions of the province are patchy and uneven as a result of unfavourable conditions earlier in the season. Late-sown stands of grain in these areas, however, are reported as good. Reports from the Swift Current, Indian Head and Scott areas are moderately optimistic, but due to the low level of moisture reserves considerably more rainfall will be required to bring all crops along to maturity in a satisfactory condition.

Crop prospects in Alberta continued very promising during the past week, with general precipitation throughout the province maintaining the favourable moisture conditions of the past few weeks. Wheat averages ten to twelve inches in height and most of the crop is in the shot blade. Coarse grains are up eight inches. Only slight hail damage was reported and there has been no change in the insect situation over the week.

Following the cool weather of May and the first two weeks in June, Ontario crop prospects were materially improved by warm weather at the end of the month which brought fodder and grain crops along rapidly. Storm damage in southwestern Ontario does not appear to have been as severe as earlier reports indicated. Haying has started but difficulty is being encountered in taking off the crop through shortage of labour. General crop prospects are favourable and fruit production is expected to be well above last year.

Reports from Quebec stress the seriousness of crop conditions owing to continued drought and the intense heat of the last week of June. Hay yields are well below normal and pasture conditions have deteriorated seriously. This is evident in a decrease in milk production. In order to relieve the situation in some areas hay fields are being used for pasture purposes. All crops are affected by these conditions and fruit crops will yield appreciably below last year's production.

In British Columbia cool weather with abundant rainfall has favoured the growth of most crops. Heavy mixed hay and alfalfa crops are looked for but haying has been delayed by frequent rains which may result in some loss. Stands of both fall and spring grains are excellent and all fruit crops are developing well with large crops in prospect.

Hot, dry weather in the Maritimes during the latter part of June has reduced the hay crop and pastures are becoming short. The grain and potato crops are still promising but the early strawberry crop has been reduced. The prospects for apples are still good.

Bright Prospects for Fruit and Vegetable Crops

The outlook for fruit production in Canada this year is exceedingly bright, according to the first estimate issued by the Dominion Bureau of Statistics. Increases in production over last season are expected for all fruits except grapes which remains unchanged. The estimates for apples, pears, plums and prunes, peaches, apricots, raspberries and grapes all exceed the 10-year, 1935-44, average.

Estimates for this year, with the final estimates for 1945 in brackets are as

follows: apples, 14,409,000 (7,635,000) bushels; pears, 714,000 (600,000) bushels; plums and prunes, 574,000 (486,000) bushels; peaches, 1,906,000 (1,566,000) bushels; apricots, 150,000 (87,000); cherries, 241,000 (237,000); strawberries, 19,767,000 (16,726,000) quarts; raspberries, 14,457,000 (12,548,000) quarts; loganberries, 1,1728,000 (1,447,000) pounds; grapes, 65,730,000 (66,012,000) pounds.

According to a recent survey, the acreage of the major canning crops, including beans, corn, peas and tomatoes, contracted for by processors throughout Canada this season shows an overall increase of 29 per cent over the contracted acreage in 1945. The total area this year amounts to 161,290 acres, while in 1945 the acreage was 125,060 acres. The acreage of each crop is substantially larger this year with beans at 9,140 acres, corn at 45,890 acres, peas at 52,520 acres and tomatoes at 53,740 acres. The comparable figures for 1945 are: beans, 8,060 acres; corn, 36,390 acres; peas, 37,630; and tomatoes, 42,980 acres.

World Wheat Situation

The world is entering the most critical stage of the present famine period. While no effort is being spared to search out and divert into export channels every bushel of grain available in the major exporting countries, no marked improvement in the supply position can be expected until new-crop grain becomes available within the next four to eight weeks. Present indications suggest that the 1946 world harvest will be substantially larger than that of a year ago, but in few, if any, of the war-torn areas, will production reach pre-war levels, with the consequence that a great deal of dependence will continue to be placed on the export surpluses of other countries. Ample evidence exists to show that, even with average or better-than-average yields for the remainder of 1946 and 1947, the world-food situation will remain critical, at least until the harvests of 1947.

For the approaching season the grain supply outlook is anything but reassuring. A preliminary estimate of world food needs and supplies for 1946-47, prepared by the F.A.O. reveals that, in the case of wheat, the import needs of the deficit countries of the world may be as large as 30 million metric tons, if large masses of the world's population are to be maintained at a "minimum subsistence" level of nutrition. On the other hand, assuming average weather conditions, the amount available from the "Big Four" exporters is not likely to exceed 20 million tons.

There are fair prospects of an average crop in western Canada this year. A realization of this prospect would help to offset the extremely small stocks of old wheat which are likely to be carried over at the end of July. Despite dwindling visible supplies, which stood at 54.2 million bushels on June 13, as compared with 268.3 million at the same date a year ago, total exports of wheat and wheat flour are being well maintained. From August 1, 1945 to May 31, 1946 exports of wheat and wheat flour have aggregated 303.3 million bushels. Now that the Canadian lake boats have started to move again, little difficulty is anticipated in reaching, if not exceeding, the 340 million-bushel export goal.

The latest estimate of production for the 1946 United States wheat crop now places the probable outturn at 1,033.1 million bushels, the third consecutive billion-bushel crop in that country and its third largest total production of wheat on record. Total supplies for the 1946-47 season will be somewhat smaller than those of a year ago, as carry-over stocks are expected to be at the lowest level since 1937. The people of the United States are asked to eat at least one-third less wheat than formerly for the duration of the emergency period. With such conservation orders in effect, along with other regulatory measures, the United States hopes to provide 250 million bushels for export during the coming season. Up to June 10 of the present crop year United States exports of wheat and wheat flour have totalled about 345 million bushels. During the remaining 20 days of this season, some 55 million bushels will have to be cleared from United States ports in order to realize the 1945-46 export goal of 400 million bushels.

Ideal weather conditions in the Argentine have favoured seed-bed preparation and the sowing of small grains. As yet no official estimate of the acreage to be devoted to the 1946 wheat crop has been made. Total exports have been small so far this year, running about one-half the amount exported for the same period a year ago. The present estimate of the Australian 1946 wheat acreage is placed at 12.2 million acres and compares with the goal of 15.5 million. Weather conditions vary from poor to excellent. Assuming an average yield, the prospective wheat crop for this year seems to be little larger than the 140 million-bushel crop harvested last December. Exports from the first of the year to the middle of June aggregated 30.9 million bushels.

The European wheat crop has been subjected to excessive rainfall in western and southern areas with the result that prospective wheat yields have had to be revised downward. Unless bright, warm weather is received soon, further deterioration may follow. A private estimate now places the probable outturn in France at 219.2 million bushels. Italian and Spanish wheat crops, too, have come in for estimated reductions. Reports from Russia, on the other hand, suggest a good grain harvest.

Exports of Wheat and Wheat Flour

Canadian wheat and wheat flour are not only playing a vital role in the relief and rehabilitation of hungry peoples in Europe and Asia but are also helping to supply the food needs of many other countries.

During the first ten months of the current crop year, the movement abroad of Canadian wheat, according to figures compiled by the Dominion Bureau of Statistics, was 60,956,000 bushels higher than in the similar period of the 1944-45 crop year, aggregating 250,414,473 bushels as compared with 189,458,912, a monthly average of 25,041,447 bushels as against 18,946,000. As a result of this heavy movement the visible supplies of Canadian wheat at the end of May, as recorded by the Bureau, were less than 23 per cent of the volume held a year earlier.

Canadian wheat went to 43 countries or groups of countries during the past 10 months, of which the United Kingdom was the largest purchaser. Shipments to that country amounted to 86,705,119 bushels as compared with 65,845,217 in the corresponding period of the preceding crop year. The United States was in second place with 57,419,967 bushels compared with 30,035,221, followed by British India with 23,588,775 bushels compared with 1,181,685, Netherlands 15,680,504 bushels compared with nil, Belgium 8,780,200 (838,927), French Africa 6,996,402 (4,007,172), Russia, 6,340,076 (790,318), France 6,233,927 (901,528), Morocco 5,401,860 (312,000), Greece 4,820,843 (4,862,650). Large shipments also were consigned to New Zealand, British South Africa, Malta, Egypt, Norway, China, Colombia, Czechoslovakia, Iraq, Italy, Peru, Poland and Portugal.

Canada's exports of wheat flour also have been heavier, the 10-month total standing at 11,553,563 barrels as compared with 11,162,769 a year ago, and were consigned to no fewer than 73 countries. As was the case with wheat, the United Kingdom was the largest customer. Consignments to that country, amounting to 5,452,139 barrels, accounted for about 50 per cent of total exports. Last year in the same period the total was 5,155,830 barrels. Italy was next in order with 995,143 barrels, followed by Jamaica with 426,340, Philippine Islands 409,119, Newfoundland 364,992, Egypt 322,831, Trinidad and Tobago 321,946, Brazil 262,842, Norway 259,066, Germany 256,647, Russia 152,221, British South Africa 148,284, Venezuela 144,385, Belgium 144,202, and Hong Kong 100,825.

Stocks and Marketings of Wheat and Coarse Grains

Continuing the down-trend in the visible supplies of Canadian wheat, stocks in store or in transit in North American positions at midnight on June 27 stood at 47,008,981 bushels as compared with 50,019,496 a week earlier, a decrease of 3,010,515 bushels, according to figures issued by the Dominion Bureau of Statistics. Stocks on June 29 last year totalled 254,375,770 bushels.

Movement of wheat from farms in the Prairie Provinces was heavier during the week ending June 27 when 3,056,914 bushels were delivered as compared with 2,804,386 in the preceding week. However, during the elapsed portion of the current crop year deliveries fell to 225,593,120 bushels from 322,122,320 in the similar period of the crop year, 1944-45.

Coarse grains were moved in lesser volume from Prairie farms during the week of June 27 than in the preceding week, as shown by the following figures: oats, 1,418,101 (1,667,883) bushels; barley, 468,137 (562,586); rye, 7,008 (14,020); flaxseed, 6,942 (8,994).

Stocks of Butter, Cheese and Eggs on July 1

Further seasonal advance was recorded in the stocks of creamery butter held in nine of the principal cities of Canada on July 1, but the total was still lower than that of July 1, 1945, according to figures released by the Dominion Bureau of Statistics. Holdings on July 1 this year totalled 20,807,279 pounds as compared with 7,613,371 pounds on June 1, and 22,337,985 pounds on the corresponding date of last year.

July 1 stocks of cheese were recorded at 27,992,809 pounds as compared with 14,987,921 pounds on June 1, and 38,610,922 pounds on July 1, 1945. Stocks of cold storage eggs were reduced, totalling 6,136,180 dozen compared with 10,154,549 dozen a year ago, while the holdings of frozen egg meats fell to 7,252,462 pounds from 17,751,931 pounds on July 1, 1945.

Cost-of-Living Index for June 1

Further advance was recorded in the Dominion Bureau of Statistics cost-of-living index for June 1, when it was computed at 123.6 as compared with 122.0 for May 1, a rise of 1.6 points. From August 1, 1939, to June 1 this year there has been an increase of 22.6 per cent from an index level of 100.8. The major part of this increase is attributable to the food group which has risen more than 43 per cent since August 1939.

A general rise of two cents per quart in retail milk prices, following removal of the consumer subsidy of that amount, provided the most important factor in the June advance. There was a rise of 4.4 points in the June food index to 142.1, reflecting higher quotations for fresh vegetables and fruits, eggs, and meats, in addition to the change noted for milk.

Three other group indexes recorded moderate increases: clothing moved up from 123.7 to 124.3, homefurnishings and services from 122.1 to 122.4, and miscellaneous items from 111.5 to 112.1. The fuel and light index was unchanged at 107.2, and rentals remained at 112.6.

May Claims for Unemployment Insurance Benefit About April Level

Applications for unemployment insurance benefit in Canada during May showed a slight decline from the April level, numbering 34,777 as compared with 35,781. During May last year 8,823 claims were filed. Increases of 2,293 in Ontario and 1,247 in British Columbia were recorded in May, and decreases of 507 in New Brunswick, 3,168 in Quebec, 316 in Saskatchewan and 554 in Alberta.

Although the number of cases of unemployment resulting in claims showed no marked change in May from April, there was a decline of 25,140 in the number of live claims at May 31 compared with April 30, indicating that the decline in recorded unemployment among insured persons on any given date that began in March 1946 is continuing. Live claims at May 31 numbered 98,810 (74,130 males and 24,680 females) compared with 123,950 (94,979 males and 28,971 females) at April 30 and 16,645 (10,044 males and 6,601 females) at May 31, 1945. Thus the decline in recorded unemployment of insured persons at May 31, was proportionally greater for males than for females.

Claims adjudicated during May totalled 32,244, of which 23,285 were considered entitled to benefit and 8,959 not entitled to benefit. During May a total of 127,866 persons received benefit payments amounting to \$5,221,870 for 2,719,294 compensated unemployed days compared with 158,168 persons who were paid \$7,011,579 for 3,446,271 days during April and 21,294 persons paid \$672,869 for 349,996 days in May 1945.

The average duration of the unemployment compensated was 21.3 days in May, 21.8 days in April and 16.4 days during May last year. The average amount of benefit paid per beneficiary was \$40.84 in May, \$44.33 in April and \$31.60 in May 1945. The average amount of benefit paid per compensated unemployed day was \$1.92 in May, \$2.03 in April and \$1.92 in May 1945.

Cheques Cashed Against Individual Accounts in May

Cheques cashed against individual accounts showed a decline of 11.3 per cent in May from the same month of last year, the total being \$6,116 million compared with \$6,894 million. The high level reached in May last year reflected the influence of heavy payments on the Eighth Victory Loan. Cheques cashed during the first five months of the present year aggregated \$28,895 million compared with \$26,582 million in the similar period of 1945, an increase of 8.7 per cent.

Speculative factors continued at a high level, the index of common stock prices having been 126.1 in the last week of May compared with 97.2 in the same month of last year, and 125.1 in April of this year. Wholesale prices and the cost of living showed moderate increases, while the index of the physical volume of business in the latest

available month was at a somewhat lower level than in the same month of last year, but higher than in the preceding month.

Cheques cashed in the Maritime Provinces in May rose to \$176 million from \$165.2 million in May last year, a gain of 6.6 per cent. There was a decline in the Province of Quebec of 2.9 per cent, the total for the area standing at \$1,885 million as compared with \$1,941 million. Cheques cashed in Montreal amounted to \$1,730 million compared with \$1,765 million last year.

In Ontario there was a decline of 20.1 per cent in the amount of cheques cashed in May, the aggregate amounting to \$2,544 million compared with \$3,183 million. Considerable declines were shown in Ottawa and Toronto, the drop having been 44.6 and 13.1 per cent, respectively. The prairie Provinces recorded a decline of 13.0 per cent, or from \$1,162 million in May last year to \$1,011. In British Columbia there was an advance of 12.8 per cent, the total rising from \$443 million to \$499 million.

Department Store Sales Continue Advance

Extending further the broad margin of increase recorded in the first four months of the year, department store sales in May advanced 28 per cent over sales in May last year, the Dominion Bureau of Statistics reports. The May increase compares with an average gain of 18 per cent in the preceding four months and brings the cumulative increase for the January-May period to 20 per cent. As compared with April, however, business volume in May showed a reduction of two per cent. Unadjusted indexes, on the base 1935-1939=100, stood at 208.7 for May, 162.8 for May 1945, and 213.2 for April, 1946.

Pronounced improvement was recorded in May over the corresponding month of last year in all sections of the country and in all cases the month's gains were considerably larger than the gains in cumulative results for the first four months. There were identical gains of 31 per cent in Ontario and Quebec, followed by increases of 28 per cent in the Prairie Provinces, 23 per cent in British Columbia and 22 per cent in the Maritime Provinces. Average increases during the first five months ranged within 17 to 23 per cent for the provinces from Quebec to British Columbia, the Maritime Provinces having the somewhat lower increase of 14 per cent.

Sales of radio and household appliances continued their previous expansion with increases in dollar volume of 210 and 109 per cent, respectively, over May 1945. Sales of hardware and kitchen utensils rose 52 per cent, showing a somewhat larger gain than in earlier months, and house furnishings and furniture also exceeded the average gain with an advance of 34 per cent.

Country General Store Sales in May

Sales of country general stores were 14 per cent higher in May than in April and 17 per cent above those of May last year, according to figures compiled by the Dominion Bureau of Statistics from country-wide reports. The increase over May 1945 was on a par with the gain recorded in April over the corresponding month of last year.

For the first quarter of the year the average gain over last year was only eight per cent, but with the increases of 17 per cent for both April and May the cumulative gain for the first five months stands at 12 per cent. Heavy sales of feed, building supplies and materials were cited by some of the retailers reporting to the Bureau as among the more important factors contributing to this recent sales expansion. Unadjusted indexes of sales, on the base 1935-1939=100, stood at 213.4 for May, 186.7 for April, and 182.1 for May 1945.

Except in British Columbia, where a pronounced sales increase of 26 per cent occurred, increases in May were unusually uniform, the provincial average increases being close to the average gain for the country as a whole. For the Maritime Provinces the increase was 15.9 per cent; Quebec, 15.9; Ontario, 19.5; Manitoba, 15; Saskatchewan, 14.5; and Alberta, 16.8 per cent.

Indexes of Wholesale Prices

Due principally to continued strength in animal products, the Canadian farm product wholesale price index, as compiled by the Dominion Bureau of Statistics, rose 0.9 points to 109.7 between May 31 and June 28. A gain of 1.3 to 130.5 in the index for this series reflected higher prices for steers, hogs and eggs which outweighed lower quotations for calves, lambs and fowl. Field products moved up 0.7 in the same interval,

strength in rye, potatoes and onions overbalancing weakness in hay.

Industrial material prices registered strength in June also, the composite index for 30 commodities advancing 0.7 to 103.6 between the weeks of May 31 and June 28. Firmer prices for foods were mainly responsible, the index for this series advancing 2.0 to 108.2 due to increases in steers and hogs. Thirteen manufacturing materials rose 0.6 to 86.3 due to a further increase in raw cotton, while the stable series comprising 12 commodities remained unchanged at 124.0.

May Financing of Motor Vehicle Sales

Financing of motor vehicle sales in Canada during May was at approximately the same level as in April but continued the sharp gains over 1945 recorded in the earlier months of the year, according to figures released by the Dominion Bureau of Statistics.

Sales of 5,158 new and used vehicles were financed to the extent of \$3,986,897 during May as compared with 5,784 vehicles for \$4,065,515 in April and 2,433 vehicles for \$1,150,769 in May 1945. As compared with the latter month, the figures for May this year represent increases of 212 per cent in number and 246 per cent in financed value.

During the first five months of this year an aggregate of 20,262 vehicles have been financed for \$13,785,394 as compared with 10,902 vehicles for \$5,576,786 in the corresponding period of 1945. New vehicles accounted for 7,180 of this year's total as against 1,251 of last year's.

New vehicles financed during May numbered 2,333 and the amount of financing was \$2,702,461 as compared with 2,295 vehicles for \$2,534,982 in April and 276 for \$361,921 in May 1945. Used vehicles financed numbered 2,825 at \$1,284,436 as compared with 3,489 for \$1,530,533 in April and 2,157 for \$788,848 in May last year. The decline in used vehicle financing from April may be attributed to the small increase in the number of new vehicles reaching the retail market. Of the 2,333 new vehicles financed in May, 1,148 were passenger cars and 1,185 commercial vehicles.

Production of Asphalt Roofing

Substantial advance was recorded in the production of asphalt roofing materials in May, when the output included 428,752 squares of shingles and rolled roofing and 4,908 tons of felts and sheathing as compared with 304,208 squares of the former and 3,398 tons of the latter in May 1945, according to figures released by the Dominion Bureau of Statistics.

Car Loadings on Canadian Railways

Car loadings on Canadian railways for the week ended June 22 increased to 71,096 cars from 69,208 cars for the preceding week, which had been depressed by the holiday on June 10. Last year loadings amounted to 74,445 cars. Total loadings in the eastern division increased from 47,357 cars last year to 48,952 cars, but in the western division the total fell from 27,088 cars to 22,144 cars. In the West, loadings of grain were reduced from 9,355 to 3,813 cars.

Reports Issued During the Week.

1. Car Loadings on Canadian Railways -- Weekly (10 cents).
2. Fruit and Vegetable Crop Report (10 cents).
3. Monthly Review of the Wheat Situation (10 cents).
4. Wood-Turning Industry, 1944 (10 cents).
5. Coffins and Caskets, 1944 (10 cents).
6. Planing Mills and Sash and Door Factories, 1944 (10 cents).
7. Carriages, Sleighs and Vehicle Supplies, 1944 (10 cents)
8. Box, Basket and Crate Industry, 1944 (10 cents)
9. Woodenware Industry, 1944 (10 cents).
10. Miscellaneous Wood-Using Industries, 1944 (10 cents).
11. Stocks of Canadian Butter, Cheese and Eggs in Nine of the Principal Cities of Canada, July 1, 1946 (10 cents).
12. Statistical Report on the Operation of the Unemployment Insurance Act, May (10 cents).

13. Preliminary Report on Department Store Sales, May (10 cents).
 14. Asphalt Roofing Industry, May (10 cents).
 15. Country General Store Sales, May (10 cents).
 16. Telegraphic Crop Report, Canada (10 cents).
 17. Cooperage Industry, 1944 (10 cents).
 18. Price Movements, June (Preliminary) - (10 cents).
 19. Dealers' Monthly Report on Non-Ferrous Scrap Metal, April (10 cents).
 20. Prices and Price Indexes, May (10 cents).
 21. Financing of Motor Vehicle Sales, May (10 cents).
 22. Cheques Cashed and Money Supply, May (10 cents).
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