

WEEKLY BULLETIN

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Business Conditions in December

While, on a preliminary footing, the index of industrial production showed a recession in the last month of 1945 compared with November, the index of the physical volume of business recorded a minor advance. The operations of the mining industry showed revival in the latest month for which statistics are available. The flour milling industry was slightly less active in the latest month. The meat packing industry, based upon the slaughterings of the three main classes of livestock, was at a lower position. A gain was shown in the output of factory cheese after seasonal adjustment, while the production of creamery butter showed further decline.

Cotton used by the textile industry was less in December than in any other month since July. The total was 12.1 million pounds against 13.5 million in November. The output of newsprint was 276,931 tons against 299,158, but the decline was less than normal for the season. Planks, boards and wood pulp were exported in larger volume during the last month of the year. Timber scaled in British Columbia showed a reduction in November from the high level of the preceding month. The secondary iron and steel industry recorded lesser decline than in preceding months. The new business obtained by the construction industry was \$25.8 million against nearly \$45 million in November. Retail and wholesale sales were at higher levels in the latest available month.

Business Conditions in December 1945 compared with November 1945 and December 1944

	December 1945	December 1944	November 1945
Physical Volume of Business.....1935-39=100	(x)	233.0	189.9
Copper Exports.....cwt.	439,417	396,644	432,652
Nickel Exports.....cwt.	129,657	189,973	152,768
Cheese, Factory Production.....lb.	2,955,614	4,358,005	6,859,773
Butter, Creamery Production.....lb.	10,566,364	12,360,914	14,354,316
Newsprint Production.....tons	276,931	244,970	299,158
Planks and Boards Exported.....M. ft.	173,748	181,063	192,118
Wood Pulp Exported.....cwt.	2,506,802	2,253,483	2,406,609
Raw Cotton Consumption.....lb.	12,148,555	12,748,022	13,526,062
Slaughterings -			
Cattle and Calves.....No.	210,739	186,679	310,282
Sheep and Lambs.....No.	84,305	83,779	213,066
Hogs.....No.	459,398	767,669	527,803
Construction Contracts Awarded.....\$000	25,787	12,730	44,998

(x) the index of the physical volume of business, on a preliminary footing, showed a slight increase in December over the preceding month.

Canada's Merchandise Export Trade in 1945

The aggregate value of Canada's merchandise export trade in the calendar year 1945 recorded a decline of 6.4 per cent from the historical maximum reached in the preceding year, the total being \$3,218,330,000 as compared with \$3,439,953,000, according to figures released by the Dominion Bureau of Statistics. Sharp curtailment was shown in the export movement of war materials, the value of goods in this category falling from \$1,555,157,000 in 1944 to \$1,161,096,000 in 1945, a reduction of 25.3 per cent. On the other hand, the movement abroad of non-war goods rose from \$1,884,796,000 in 1944 to \$2,057,234,000, or by 9.1 per cent.

Domestic merchandise exports to the United States during 1945 were valued at \$1,196,977,000 as compared with \$1,301,322,000 in 1944, a decrease of eight per cent. The value of exports to the United Kingdom was \$963,238,000 as compared with \$1,235,030,000, a decline of 22 per cent. Exports to British India were worth \$307,461,000 as compared with \$174,794,000, Italy \$89,470,000 as compared with \$160,118,000, France \$76,917,000 as compared with \$15,865,000, Russia \$58,820,000 as compared with \$103,264,000, Newfoundland \$40,515,000 as compared with \$47,950,000, and the Netherlands \$39,970,000 as compared with \$94.

The following were other leading destinations for Canada's domestic merchandise exports in 1945, totals for 1944 being in brackets: British South Africa, \$31,593,000 (\$23,597,000); Australia, \$32,226,000 (\$43,513,000); Belgium, \$34,618,000 (\$1,000); Egypt, \$36,417,000 (\$108,290,000); Greece, \$25,563,000 (\$8,574,000); Ireland, \$14,278,000 (\$11,971,000); Jamaica \$14,404,000 (\$13,884,000); Trinidad and Tobago, \$16,433,000 (\$16,474,000); New Zealand, \$19,102,000 (\$11,916,000); Brazil, \$16,748,000 (\$7,324,000); French Africa, \$16,908,000 (\$32,163,000); Switzerland, \$10,922,000 (\$16,129,000); Yugoslavia, \$11,711,000 (nil); Ceylon, \$8,290,000 (\$6,199,000); Mexico, \$8,165,000 (\$6,273,000); Morocco, \$9,192,000 (\$1,282,000); Poland, \$9,249,000 (nil); Norway, \$7,842,000 (nil).

The total value of agricultural products exported rose from \$741,265,000 in 1944 to \$819,445,000 in 1945. Wheat exports advanced from \$384,150,000 to \$475,787,000, and wheat flour from \$90,001,000 to \$97,855,000. The aggregate value of animal-product exports moved up from \$372,926,000 to \$398,063,000. Fishery products advanced from \$63,854,000 to \$80,226,000, while meats were lower at \$166,974,000 as compared with \$192,001,000; meat exports have been increasing in recent months. A sharp decline was recorded in the iron products group, from \$772,935,000 in 1944 to \$555,090,000. In this latter group, motor vehicles and parts fell from \$433,247,000 in 1944 to \$351,889,000 in 1945. The value of planks and boards rose from \$20,119,000 to \$98,935,000, wood pulp from \$101,563,000 to \$106,055,000, newsprint paper from \$157,191,000 to \$179,451,000. The total value of wood and paper products moving into export channels rose from \$440,901,000 in 1944 to \$488,041,000.

Other large exports during 1945 were as follows, figures for 1944 being in brackets: alcoholic beverages, \$29,406,000 (\$21,109,000); rubber, \$31,328,000 (\$25,667,000); furs, \$29,572,000 (\$27,029,000); cheese, \$27,909,000 (\$27,062,000); processed eggs, \$27,297,000 (\$21,268,000); wool, \$19,559,000 (\$24,592,000); pulp wood, \$23,882,000 (\$20,012,000); engines and boilers, \$22,654,000 (\$12,781,000); farm implements and machinery, \$20,196,000 (\$13,434,000); aluminum, \$133,567,000 (\$105,520,000); copper, \$40,860,000 (\$40,544,000); nickel, \$54,778,000 (\$68,401,000); zinc, \$20,373,000 (\$15,209,000); electrical apparatus, \$60,957,000 (\$71,700,000); asbestos, \$22,184,000 (\$19,830,000); explosives, \$29,248,000 (\$19,072,000); fertilizers, \$30,428,000 (\$24,000,000).

Third Estimate of Production and Value of Field Crops

The production of wheat in Canada in 1945 is now estimated at 305,912,000 bushels with a total value of \$324,227,000. This is a reduction of \$116.2 million from the value of the 1944 wheat crop, all of which is attributable to lower production in the 1945 season, the average farm value per bushel of \$1.06 being the same for both years. In the three Prairie Provinces, total wheat production in 1945 is placed at 282 million bushels compared with the final estimate for the 1944 crop of 391.7 million bushels.

The 1945 oat crop totals 381.6 million bushels which compares with a 1944 production of 499.6 million bushels. The 1945 barley crop, now estimated at 157.8 million bushels, is appreciably below the 1944 production of 194.7 million bushels. Rye production for 1945 at 5.9 million bushels compares with a 1944 production of 8.5 million bushels. Likewise flaxseed production, now estimated at 7.6 million bushels for 1945, is 2.1 million bushels lower than the 1944 production.

With the exceptions of flaxseed and rye, the average values per bushel at the farm for the major field crops are approximately the same as in 1944. The value per bushel for spring and fall rye for 1945 is \$1.25 compared with 96 cents in 1944. On the other hand, flaxseed shows a slight reduction of eight cents per bushel, the 1945 farm value being estimated at \$2.44 per bushel. The farm values for the 1945 crops, however, are based upon prices received during the first five months of the 1945-46 crop year and price changes occurring during the remainder of the crop year will be taken into account in subsequent revisions. In the case of the wheat crop, no account has been taken of any values likely to arise to holders of participation certificates, and accordingly, the values of the 1943, 1944 and 1945 crops may be subject to revision on this account in the future. The 1945 crop estimates are also subject to revision in January of 1946 when information on disposition is available.

Dry bean production in 1945 shows a decrease of 138,000 bushels from the crop of 1944. This reduction is due to decreases in both yield and acreage. Production of dry peas in 1945 was slightly below that of 1944. Potato production in Canada for 1945 at approximately 36 million cwt. is over 13 million cwt. below the 1944 crop. This decrease is attributable to reductions in both acreage and yield. The reduction in potato output was general with the only increase in the 1945 crop being recorded for the province of Manitoba.

As contrasted to the reductions in production of grain crops, the hay and clover and alfalfa crops were above those of 1944. A slightly higher yield and an increase in acreage contributed to a larger 1945 crop of sugar beets, the total being estimated at 619,000 tons compared with 564,200 tons in 1944.

The total gross farm value of the field crops produced on 62.8 million acres in 1945 amounts to nearly \$1,089,700,000. This represents a decrease of \$207.3 million from 1944. There are a number of miscellaneous crops not included in the total acreage and value estimates given above. These would not appreciably change a comparison of total values between the two years.

Stocks and Marketings of Wheat and Coarse Grains

Stocks of Canadian wheat in store or in transit in North America at midnight on January 17 totalled 176,989,939 bushels as compared with 372,537,178 bushels on the corresponding date of last year. Visible stocks in Canadian positions amounted to 149,738,421 bushels as compared with 333,175,021 bushels, and in United States positions, 27,251,518 bushels as compared with 39,362,157 bushels.

Deliveries of wheat from farms in the Prairie Provinces during the week ending January 17 amounted to 4,161,914 bushels as compared with 4,687,608 bushels in the preceding week. Marketings of wheat during the elapsed portion of the present crop year, which commenced August 1, 1945, totalled 179,786,964 bushels as compared with 235,443,194 bushels in the corresponding period of the crop year 1944-45.

The following quantities of coarse grains were also delivered from farms in the Prairie Provinces during the week ending January 17, totals for the preceding week being in brackets: oats, 5,260,999 (5,978,138) bushels; barley, 665,269 (840,147); rye, 25,339 (31,243); flaxseed, 49,340 (57,798).

Production of Dairy Factories in 1944

The value of all products manufactured by dairy factories in Canada in 1944 totalled \$248,806,528 as compared with \$243,843,220 in the preceding year, a decrease of \$4,963,308, according to figures released by the Dominion Bureau of Statistics. The total number of dairy factories in operation in 1944 was 2,308, including 1,132 creameries, 953 cheese factories, 197 combined butter and cheese factories and 26 concentrated milk plants.

Production of creamery butter in 1944 amounted to 298,777,262 pounds valued at \$101,534,710, compared with 311,709,476 pounds valued at \$105,103,734 in 1943. The quantity made in 1944 was the second highest in the history of the industry. The average price per pound was 33.98 cents, an increase over 1943 of 0.26 cents. All provinces shared in the decrease in output, except New Brunswick, Saskatchewan and British Columbia.

The production of factory cheese in 1944 amounted to 181,117,830 pounds valued at \$36,659,129, an increase in quantity over 1943 of 15,590,097 and an increase in value of \$3,108,803. The average price per pound in 1944 was 20.24 cents, compared with 20.27 cents paid in 1943. The production of cheese in Ontario represented 59 per cent and that of Quebec 35 per cent of the total output for the Dominion.

Production of concentrated milk -- whole milk products, and milk by-products -- amounted to 269,964,424 pounds valued at \$27,708,427, as compared with 255,225,057 pounds valued at \$26,013,590 in the preceding year.

Manufacturing Industries of Ontario in 1943

Under the impetus of war production, the manufacturing industries of Ontario in 1943 continued to expand their operations. Compared with the previous year there were increases of 5.0 per cent in the number of persons employed, 13.7 per cent in the salaries and wages paid, and 10.6 per cent in the gross value of production.

In 1943, reports were received from 10,587 establishments operating in Ontario. Their combined output was valued at \$4,221,101,063. Employment was furnished to 570,017 persons who were paid \$956,399,212 in salaries and wages. The cost of materials used was valued at \$2,278,871,511, while the value added by manufacture amounted to \$1,844,651,587. The investment in fixed and current assets totalled \$2,994,953,988.

Ontario is the most important manufacturing province in the Dominion. This favourable position is not of recent growth, but has been maintained over a long period of years.

In spite of the rapid industrial development in recent years in other provinces, such as Quebec, British Columbia and Manitoba, Ontario is maintaining a manufacturing production equal to that of the remainder of the Dominion. In 1942 the percentage was 50.5. Due to the relatively greater expansion in war production in other provinces in 1943 the percentage dropped to 48.3.

Ontario has also the greatest diversification of manufacturing production of any province. Outstanding among the industries in which this Province is preeminent are those of automobiles, agricultural implements and starch manufacture which are carried on practically in this province alone. Other important industries in which Ontario leads, with the percentage which the production of each bears to that of the Dominion total in 1943 are as follows: leather tanneries 88, rubber goods 77, primary iron and steel 71, electrical apparatus and supplies 69, fruit and vegetable preparations 62, castings, iron 61, flour and feed mills 58, furniture 57, and hosiery and knitted goods 56.

In gross value of production the automobile industry with an output valued at \$351,-765,839 again headed the list. Miscellaneous chemical products with a value of production of \$193,083,839 ranked second. Other leading industries in the order of their importance are: non-ferrous metal smelting and refining \$186,600,741, miscellaneous iron and steel products \$175,507,602, automobile supplies \$171,536,667, electrical apparatus and supplies \$169,654,250, primary iron and steel \$159,789,576, etc.

Financing of Motor Vehicle Sales in December

Financing of motor vehicle sales recorded a substantial increase in December 1945, compared with the same month of 1944. There were 1,815 units financed for \$1,029,589 in December 1945, up 14 per cent in number and 21 per cent in amount of financing over the 1,589 transactions involving \$853,068 in December of the preceding year. New vehicles included in the December 1945 total numbered 263.

Increases in used vehicle financing amounted to 13 per cent in number and 18 per cent in dollar volume, 1,552 used vehicles being financed for \$647,871 in December 1945, as compared with 1,370 vehicles financed in December 1944 for \$550,690. Preliminary totals for the full year 1945 showed 3,628 new vehicles financed, whereas only 2,371 units were financed in 1944. Used vehicles financed number 24,387 in 1945 and 30,599 in 1944.

Production of Copper and Nickel in November

The Canadian production of new copper in November 1945 amounted to 32,239,787 pounds as compared with 35,171,852 in the preceding month and 43,811,150 in November, 1944. During the first 11 months of 1945, production aggregated 443,019,969 pounds as compared with 501,245,928 in the similar period of 1944.

Nickel production in November 1945 was recorded at 15,483,999 pounds as compared with 17,244,911 in October and 22,259,195 in November 1944, while the total for the 11 months ended November stood at 230,920,272 pounds as compared with 252,830,425 in the corresponding period of 1944.

Stocks of Raw Hides and Skins in November

Stocks of raw cattle hides held by tanners, packers and dealers amounted to 824,435 at the end of November 1945, as compared with 724,354 at the end of October, and 523,110 at the end of November, 1944. Calf and kip skins on hand increased from 532,816 at the end of October to 578,239 at the end of November, 1945. Stocks of other types at the end of November, 1945 included 102,484 dozen sheep and lamb skins, 405,584 goat and kid skins and 20,425 horse hides.

November Production of Leather Footwear

Production of leather footwear in November 1945 amounted to 3,655,440 pairs, as compared with 3,746,710 in the preceding month and 3,130,972 in November 1944. During the first 11 months of 1945, 35,894,916 pairs were produced as compared with 32,658,465 in the similar period of 1944.

Wood-Using Industries of Canada

Total production in the wood-using industries of Canada during 1943 reached a value of \$187,904,552, an increase of almost fourteen million dollars over the output of \$174,217,154 reported in 1942. The 2,076 establishments engaged in this line of manufacture represented a capital investment of \$124,701,572 and gave employment to an average of 45,650 employees. The cost of materials used in these industries amounted to \$94,129,300, as against \$88,791,041 in 1942, and the value added by manufacture was \$90,860,922, as compared with \$82,717,124 in 1942.

Production of Automobiles in December

The production of motor vehicles in Canada in December 1945 totalled 5,997 units as compared with 1,575 units in the preceding month and 12,530 units in December 1944, according to figures released by the Dominion Bureau of Statistics. The December 1945 total included 1,612 passenger models and 4,385 commercial vehicles. During the calendar year 1945, 132,796 motor vehicles were produced as compared with 158,117 in the preceding year.

Car Loadings on Canadian Railways

Car loadings on Canadian railways for the week ended January 12 increased to 69,476 cars from 50,700 cars for the preceding week and 65,386 cars for the corresponding week last year. The seasonal increase was greater than for some years and the index number rose to 155.0 from 137.6. In the eastern division, car loadings increased from 40,836 cars in 1945 to 42,851 cars, and in the western division from 24,550 to 26,625 cars.

Total loadings of grain increased from 7,271 cars in 1945 to 7,858, sand, stone, gravel, etc. from 1,488 to 2,234 cars, pulpwood from 3,133 to 4,838 cars, wood pulp and paper from 3,180 to 3,964 cars, and merchandise from 13,705 to 15,080 cars. Live stock declined from 3,035 to 2,373 cars, ores and concentrates from 1,972 to 1,429 cars, and automobiles, trucks and parts from 1,967 to 1,038 cars.

Reports Issued During the Week

1. Sales of Fertilizers in Canada, Year Ended June 30, 1945 (10 cents).
 2. Silver, Lead and Zinc Production, November (10 cents).
 3. Canada's Domestic Exports by Countries, December, 1945 (10 cents).
 4. Summary of Canada's Domestic Exports, December, 1945 (10 cents).
 5. Third Estimate of Production and Value of Field Crops (10 cents).
 6. Production of Dairy Factories, 1944 (10 cents).
 7. Automobile Production, December (10 cents).
 8. Monthly Review of Business Statistics, December (10 cents).
 9. Production of Leather Footwear, November (10 cents).
 10. Financing of Motor Vehicle Sales, December (10 cents).
 11. Manufacturing Industries of Ontario, 1943 (25 cents).
 12. Railway Revenue Freight Loadings, December (10 cents).
 13. Car Loadings on Canadian Railways - Weekly (10 cents).
 14. Stocks of Raw Hides and Skins, November (10 cents).
 15. Canadian Grain Statistics - Weekly (10 cents).
 16. Wood-Using Industries in Canada, 1943 (35 cents).
 17. Copper and Nickel Production, November (10 cents).
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