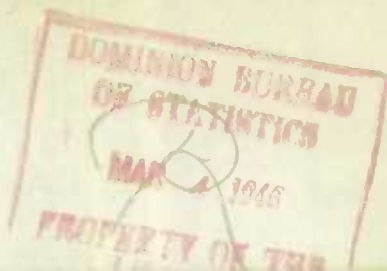


## WEEKLY BULLETIN

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Department of Trade and Commerce



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### Canada's Merchandise Export Trade in January

Virtual disappearance of war materials as such as an element in the export trade of Canada, and the continued heavy movement abroad of foods and other normal peace-time commodities, were features of the January trade, according to figures released by the Dominion Bureau of Statistics. The total value of merchandise exported in January this year was \$189,090,000 as compared with \$230,498,000 in January, 1945.

The pronounced decline in the war materials group of exports from \$114,896,000 in January last year to the low figure of \$109,000 this year, was to be expected. Industry now is being geared for the production of civilian goods, and exports of certain commodities, which during the war years, were classed as war materials, now are entering trade channels for use in peacetime industry. Thus, exports of non-war commodities rose from \$115,602,000 in January 1945 to \$188,981,000.

The export of Canadian agricultural and vegetable products advanced from \$26,400,000 to \$48,155,000 in January, 1946. Wheat shipments continued heavy, increasing from \$6,606,000 to \$23,655,000, while wheat flour advanced from \$5,643,000 to \$8,842,000. The total for the animal products group rose from \$30,513,000 to \$35,114,000, including meats to the value of \$14,302,000 as compared with \$15,875,000, fish and fishery products \$6,729,000 as compared with \$4,361,000, and eggs \$2,767,000 compared with \$2,270,000.

Wood and paper products were exported to the value of \$42,261,000 as compared with \$31,852,000 in January, 1945. Shipments of planks and boards were worth \$7,603,000 as compared with \$6,403,000, wood pulp \$8,249,000 as compared with \$6,922,000, and newsprint paper \$18,728,000 as compared with \$11,316,000. There was a marked decline in the iron and its products group from \$55,721,000 in January last year to \$17,928,000. In this latter classification, motor vehicles and parts fell from \$37,354,000 to \$9,009,000. Aluminum exports were reduced from \$14,415,000 to \$1,685,000 in 1946, and nickel from \$4,911,000 to \$2,996,000.

The United States was the chief destination for Canada's January exports with a total of \$62,323,000 as compared with \$84,703,000, followed by the United Kingdom with \$51,148,000 as compared with \$83,230,000. Russia was third with \$8,834,000 as compared with \$4,380,000, and British India next at \$8,424,000 as compared with \$18,022,000.

Canada's material participation in the rehabilitation of countries of Continental Europe is reflected in the export totals for January. Shipments of Canadian merchandise to Belgium were valued at \$5,059,000, Czechoslovakia \$2,092,000, France \$4,291,000, Greece \$318,000, Italy \$1,735,000, Netherlands \$6,665,000, Norway \$1,405,000, Poland \$2,834,000, Sweden \$376,000, and Yugoslavia \$1,529,000.

### Productive Operations in January

The index of the physical volume of business, according to preliminary calculations, showed a continuance of the downward trend in January. The maximum in history was reached in the early months of 1944 and owing to the decline in war production the index has receded during the last two years. The standing in December was 196.0 and it is probable that the index for January will be at a somewhat lower level.

The majority of the factors indicating the trend of activity in the mining industry recorded advances in the latest month for which statistics are available. Gold receipts at the Mint were 248,308 fine ounces against 194,941 in December.

The flour milling industry was somewhat more active in the latest month for which statistics are available, the index rising from 135 to 214. The manufacture of sugar showed a considerable gain after seasonal adjustment. The tobacco industry was active in the first month of the year, the release of cigarettes rising from 1,166 million to 1,491 millions. The release of cigars rose from 16.6 million to 17.9 million. Canadian raw leaf tobacco showed an increase before seasonal adjustment. The output of the meat packing industry was at a somewhat lower level in January, the rise in the slaughtering of hogs having been offset by the decline in cattle. A minor increase was shown in the output of creamery butter after seasonal adjustment, while the production of cheese recorded decline.



Raw cotton used by the textile industry was greater than in either November or December. The output of newsprint rose from 276,931 tons to 328,414. Declines were shown in the exports of lumber and pulp. Timber scaled in British Columbia showed decline in the latest available month. A majority of the factors indicating the trend in the manufacture of secondary iron and steel products showed advances, contrasting with the lower levels in shipbuilding. The new business obtained by the construction industry was \$27.4 million compared with \$25.8 million. The index of retail sales after adjustment showed recession in the latest month, while wholesale sales rose to a higher level.

Productive Operations in January compared with January 1945 and December 1945

		January 1946	January 1945	December 1945
Physical Volume of Business .....	1935-1939=100	★	228.8	193.0
Gold Receipts at Mint .....	fine ounces	248,308	232,647	194,941
Silver Shipments .....	fine ounces	307,965	346,170	361,309
Inspected Slaughtering -				
Cattle and Calves .....	no.	189,225	193,121	210,739
Sheep and Lambs .....	no.	87,625	73,973	84,305
Hogs .....	no.	477,592	756,446	459,398
Cigarettes Released .....	no.	1,491,168,855	1,159,075,428	1,166,319,434
Cigars Released .....	no.	17,904,565	16,553,214	16,565,216
Raw Cotton Consumption .....	lb.	14,105,993	13,127,147	12,148,555
Cheese, Factory Production .....	lb.	1,844,984	2,556,720	2,955,614
Butter, Creamery Production .....	lb.	9,639,678	11,421,403	10,566,364
Exports -				
Canned Salmon .....	cwt.	77,334	16,974	101,377
Woodpulp .....	cwt.	2,209,328	1,869,343	2,506,802
Shingles .....	squares	97,926	113,823	105,649
Planks and Boards .....	M ft.	144,978	126,398	173,748
Newsprint Production .....	tons	328,414	264,766	276,931

\* According to preliminary calculations the index of the physical volume of business showed recession from December.

Butter Supply Position

Butter production and disappearance figures indicate that the situation has reached a more critical stage, and it is now clear that the shortage forecast during the past six months has become a reality. Followed by a decline in January even greater than that of December, extra butter had to be taken out of storage to meet the deficiency. Consequently, the holdings of creamery butter on January 1 were down almost five million pounds from last year, and on February 1 the decline had reached to almost eight million pounds. Withdrawals from storage in January 1946, were 28 per cent greater than those of the same month last year, and production represented just about 43 per cent of domestic requirements. Last year it was 53 per cent. During the period October, 1945, to January, 1946, the output of creamery butter was approximately 56 per cent of the amount needed to meet the requirements of the domestic market. The comparative percentage for the same period of 1944-45 was 64 per cent.

It is difficult, of course, to determine with any degree of accuracy the position likely to be faced in the next three months. However, production conditions on farms would indicate that a decline in the creamery butter make may be expected to continue throughout the remainder of the out-storage period which terminates on May 1. On the basis of a six-ounce ration it may be assumed that the domestic disappearance would exceed that of a year ago; the increased demand being due to servicemen and their dependents returning to Canada, and to the enlarged purchasing power which continues to exist.

In January the disappearance increased by approximately one million pounds over the same month last year, and by this token an additional three million pounds of butter will be needed to feed the population during the next three months. Obviously, unless something unexpected develops to change the trend of the factory output, production is not likely to exceed 52 million pounds. Combined with stocks in store, this amount would be quite insufficient to meet the domestic needs already indicated. With the weekly ration reduced to four ounces per person for March and April, less butter will be required, and a deficit of several million pounds promises to be changed to a satisfactory position at the end of the storage period on May 1.

At the present time, distributors are experiencing short supplies in many markets. When production is low and stocks are moving rapidly out of storage local shortages are



unavoidable, even when the stock-holdings of the Dominion appear to be adequate. For one thing the demand in a given market can never be measured with absolute precision. Particularly is this the case in a period of readjustment when people are moving to new locations and into different lines of employment. Then again in a country the size of Canada it often requires some time to move the product from one market to another. For these reasons a surplus of at least 10 million pounds is necessary to permit an adequate and satisfactory distribution of butter supplies during the off-production season. The shortages that developed this year came almost a month earlier than usual, owing to the sharp decline in production during the last few months.

The production of creamery butter in January 1946 amounted to 9,640,000 pounds, a reduction of 15.6 per cent from the same month of last year. The cheddar cheese make amounted to 1,845,000 pounds, representing a decline of nearly 28 per cent. Ice cream production was 748,000 gallons, being seven per cent less than that produced in the same month of 1945. January production of concentrated milk products fell to 11,975,000 pounds, being 18 per cent less than that produced in January, 1945. The total milk production of Canada in 1945 is now estimated at 17,618,810,000 pounds as compared with 17,621,851,000 pounds in 1944, a reduction of only one per cent.

#### Stocks and Marketings of Wheat and Coarse Grains

Stocks of Canadian wheat in store or in transit in North America at midnight on February 21 totalled 143,417,294 bushels as compared with 362,797,187 bushels on the corresponding date of last year. This year's visible supply included 126,321,103 bushels in Canadian positions as compared with 330,876,092, and in United States positions, 17,096,191 bushels as compared with 31,921,095 bushels.

Deliveries of wheat from farms in the Prairie Provinces during the week ending February 21 totalled 1,095,379 bushels as compared with 1,017,366 bushels in the preceding week. During the elapsed portion of the present crop year which commenced August 1, 1945, deliveries from western farms amounted to 186,642,177 bushels as compared with 255,860,933 bushels in the similar period of 1944-45.

The following quantities of coarse grains were also delivered from farms in the Prairie Provinces during the week ending February 21, totals for the preceding week being in brackets: oats, 1,196,783 (1,108,653) bushels; barley, 209,602 (217,667); rye, 14,727 (11,053); flaxseed, 5,718 (12,434).

#### Feed Situation in Canada

Partial results of the December live-stock survey indicate that the downward trend in numbers of live stock which was evident last June is continuing. Hog numbers as at December 1945 are estimated to be 23.5 per cent smaller than a year ago, while the indicated number of sows bred to farrow suggest that the spring pig crop of 1946 will be approximately nine per cent smaller than it was in 1945. This disclosure comes at a time when a review of Canada's feed grain supplies reveals that estimated total supplies available for the crop year have had to undergo some downward revision since the issue of the September estimate of feed grain production for 1945. Generally speaking, it is felt that this reduction in the estimated amount of feed grain available for live-stock feeding is compensated for by the estimated reduction in live-stock numbers and that overall supplies should continue to be sufficient to meet requirements for the remainder of the crop year. At the same time, a reduction in live-stock numbers, particularly of hogs, should be instrumental in affording a certain amount of relief to a somewhat tight supply position in the high-protein class of feedstuffs.

Expressed in terms of grain-consuming animal units, the size of Canada's live-stock population expanded significantly during the war years, reaching its peak during the 1944 crop year. Since that time a downward trend has been in evidence and during the year June 1, 1944 to June 1, 1945, the number of grain-consuming animal units declined over seven per cent. Heavy marketings during the fall of 1945 were an important factor in a further liquidation of live-stock numbers. Hog numbers have displayed the most significant decline with the greatest reduction apparent in the Prairie Provinces.

Since live-stock feeders in eastern Canada rely on substantial amounts of western feed grains for their feeding programs, one of the problems they have had to face during the past couple of years has been one of securing an adequate distribution of available supplies. In an effort to mitigate this situation during the present crop year, an all-time record amount of oats, in addition to substantial quantities of barley, was moved down the Great Lakes into eastern positions. As a result, visible supplies of coarse grains in eastern Canada at January 31, 1946 were higher than at the same date for the



two preceding years, and approximately 60 per cent greater than they were on January 31, 1945.

Of the grains used for live-stock feedings, oats seem to be in greatest supply and may prove to be the backbone of feed supplies for the remainder of the year. Up to the end of January, marketings of oats by farmers in the Prairie Provinces totalled over 67 million bushels, as compared with 63 million at the same date in 1945, while supplies in eastern positions were almost twice as large as they were a year ago. Restricted exports of oats are still being maintained by a system of export permits which are issued only after careful consideration of the merits of each request for export supplies. At the beginning of February, all delivery points were placed on an open-quota basis for the delivery of oats, thus releasing the last of grains from marketing restriction.

Barley stocks are scarce and existing supplies are being retained for the Canadian feeder by means of an embargo on all barley exports. It is estimated that over 80 per cent of marketable western barley has already been delivered. Marketings by western farmers so far this year have been substantially reduced. In an effort to expedite its movement to eastern Canada since western "food-bank" reserve requirements have been met, all restrictions on barley shipments eastward out of Alberta have been cancelled as were the restrictions on eastward oat shipments at an earlier date.

In other years, surplus wheat stocks have been regarded as potential reserves for feeding purposes, especially those of the lower grades. During the war years, when surpluses were somewhat burdensome, live-stock consumption of wheat expanded until it reached almost 100 million bushels per year. This year Canada's wheat crop has been grading very high and emphasis will be placed upon its use as human food rather than animal feed. Even now the feed wheat situation is becoming "tight" and not much improvement is anticipated for the remainder of the crop year.

A review of fodder crop production reveals that the production of hay and clover in 1945 was over 15 per cent greater than it was a year ago. Production of alfalfa was up slightly too, but fodder corn declined almost 20 per cent. As far as the eastern feeder is concerned, production distribution was quite satisfactory with above-average crops produced in eastern Canada. With reduced live-stock numbers this year's supplies appear to be quite sufficient.

Millfeed production during the first five months of the 1945-46 crop year gives promise of another record production year. During that time, over 360 thousand tons were produced as compared with 344 thousand for the same period a year ago. Most of this product moves to the feed-deficit areas under the Freight Assistance scheme and so far during the present crop year shipments under this plan seem to be in line with those a year ago. Keen demand for domestic feeders has necessitated restricted exports with the result that during the August-December period of 1945 only about five per cent of total production left the country.

Comparisons between the various feed concentrates used by the Canadian feeder reveal that the high protein feeds are in shortest supply with the fishmeal situation on the Pacific Coast in a particularly acute condition. However, it is felt that supplies are sufficient to meet minimum requirements, provided that the strictest feeding economy is practised. In keeping with the times, some of the high proteing feed manufacturers have instituted a system of voluntary rationing of supplies to their customers in an effort to ensure more equitable distribution of available stocks.

#### Canned Food Production in Canada

The war gave a great impetus to the canning industries of Canada. To meet the greatly increased demand for canned foods of all kinds, production programs were expanded with the result that the value of canned foods in 1943 totalled about \$106,000,000 as compared with \$69,500,000 in 1939. The development of the canned foods industries in Canada showed a remarkable expansion since the beginning of the 20th century. In 1900 the total value did not exceed \$8,250,000.

Production of canned foods in 1943 was as follows by items, figures for 1939 being in brackets: canned fish, \$27,286,951 (\$15,478,961); canned fruits, \$4,225,833 (\$7,769,005); canned vegetables, \$15,331,390 (\$14,526,671); canned meats, \$10,890,282 (\$1,743,227); canned soups, \$10,568,847 (\$9,259,222); other canned foods, \$11,536,549 (\$9,113,941); and concentrated milk products, \$26,105,175 (\$11,575,971).

Exports of canned foods during 1943 amounted to \$32,777,906 as compared with \$26,603,049 in 1939. Of the exports in 1943, canned fish totalled \$20,972,159, con-



centrated milk products \$5,433,172, canned meats and soups \$5,268,760, and canned vegetables \$744,790. Imports of canned foods during 1943 amounted to \$1,886,933 as compared with \$3,814,062 in 1939.

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#### Financing of Motor Vehicle Sales in January

The volume of motor vehicle financing in Canada in January involved 2,311 transactions for a total value of \$1,322,522, higher by 54 per cent in both number and dollar amount than the 1,504 contracts negotiated in January 1945 for an amount of \$856,898, according to figures released by the Dominion Bureau of Statistics. There were 456 new vehicles financed in the month under review while only 191 new units were financed in January, 1945.

Increases in used vehicle financing amounted to 41 per cent in number and 18 per cent in dollar volume over January of last year. Considerably more than half of the transactions were concentrated in Ontario where an 82 per cent increase over January 1945 was recorded. Substantial gains occurred also in the Maritime Provinces and in Alberta, while a minor increase was reported for British Columbia. Results for Manitoba and Saskatchewan combined and for Quebec showed declines of nine and four per cent, respectively. These were in striking contrast with increases for adjacent regions.

The Bureau introduces a new series this month which gives details for passenger and commercial models separately. This development has been possible through the co-operation of Canadian finance companies. The summary for January 1946 reveals the extent to which activity in the new vehicle field is concentrated in the financing of commercial vehicles, while at the same time transactions involving passenger models predominate in the used vehicle field. Of the 456 new vehicles financed, 372 were trucks and buses, while the used vehicle total of 1,855 included 1,361 passenger cars.

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#### Production of Gold in 1945

Production of gold in Canada in 1945 was recorded at 2,651,250 fine ounces as compared with 2,922,911 in the preceding year, according to figures released by the Dominion Bureau of Statistics. Output was as follows, by areas, totals for 1944 being in brackets: Nova Scotia, 3,291 (5,840) fine ounces; Quebec, 654,822 (746,784); Ontario, 1,584,612 (1,731,836); Manitoba and Saskatchewan, 179,238 (196,950); British Columbia, 190,257 (196,857); Yukon, 31,721 (23,818); Northwest Territories, 7,198 (20,775).

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#### Production of Copper and Nickel in 1945

Canadian production of new copper in 1945 was recorded at 477,951,000 pounds as compared with 547,070,000 in the preceding year, according to figures compiled by the Dominion Bureau of Statistics. The 1945 output of nickel totalled 246,196,000 pounds as compared with 274,599,000 in 1944.

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#### Output of Ammonium Sulphate

Production in Canada of ammonium sulphate advanced to 222,000 tons in 1945 from the total for the preceding year of 210,000 tons, and 196,000 tons in 1943, according to figures compiled by the Dominion Bureau of Statistics. Considerable tonnages of this material enter export channels, the total in 1945 amounting to 181,000 tons as compared with 167,000 tons in 1944.

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#### Production of Galvanized Sheets in 1945

Production of galvanized sheets in Canada in 1945 was recorded at 61,600 tons as compared with 53,200 tons in the preceding year, and 39,100 tons in 1943, according to figures released by the Dominion Bureau of Statistics. The factory selling value of the 1945 output was \$4,722,000 as compared with \$3,531,000 in 1943.

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#### Production of Automobiles in January

Production of motor vehicles in Canada in January 1946 numbered 8,495 units as compared with 5,997 in the preceding month and 13,745 units in January 1945, according to figures released by the Dominion Bureau of Statistics. This year's January output in-



cluded 1,391 passenger models, and 7,104 commercial vehicles. Of the passenger cars, 1,200 were 4-door closed models.

#### Commercial Failures in 1945

Fewer commercial failures were recorded in Canada in 1945 than in any other year for which statistics are available, according to figures compiled by the Dominion Bureau of Statistics. The number of business failures in 1945 was 155 as compared with 218 in the preceding year. The standing in 1945 was only one-ninth of the number reported in 1939.

Defaulted liabilities also reached a low point in 1945. A considerable decline was shown from 1944, and the total was less than in any other year since 1923 when the statistics were first collected. The amount was reduced to \$2,219,942 against \$3,101,435 in the preceding year. The total in 1939 was \$15,089,461, while the maximum in the last 22 years was reached in 1923 at \$22,537,537.

#### Car Loadings on Canadian Railways

Car loadings on Canadian railways for the week ended February 16 increased to 67,395 cars from 64,553 cars for the preceding week and 65,999 cars for the corresponding week last year. In the eastern division, loadings increased from 43,854 cars in 1945 to 44,143 cars, and in the western division from 22,145 cars to 23,252 cars.

Loadings of grain declined from 5,878 cars in 1945 to 5,330 cars, vegetables from 1,128 to 660 cars, live stock from 2,217 to 2,023 cars, ores and concentrates from 1,890 to 1,481 cars, iron and steel products from 1,763 to 1,179 cars, and automobiles, trucks and parts from 1,568 to 945 cars. Pulpwood increased from 3,831 to 6,300 cars, wood pulp and paper from 3,348 to 4,006 cars, and merchandise from 14,631 to 16,232 cars.

#### Public Libraries of Canada

Evidence of progress as well as confirmation of the problems occasioned by wartime restrictions and conditions is contained in summarized statistics of the work of public libraries for the year 1943, according to the biennial survey conducted by the Dominion Bureau of Statistics. There has been a consistent decrease in the circulation of adult recreational reading since the first year of the war, but this is the only item which does not record progress. The book stock has been maintained and increased in the face of difficulties affecting supply; the number of registered borrowers has increased; and expenditures are \$300,000 in excess of those in 1939.

Expenditures on public library service rose from \$2,131,000 in 1939 to \$2,485,000 in 1943. About 10 per cent of the increase in total expenditures is the responsibility of Quebec province. Since 1941, educational and municipal authorities have been promoting the establishment of improved library facilities in Quebec. Provincial financial assistance has also increased in other provinces, where it is given, since the last survey. Ontario has increased the grants to individual libraries, based on progress and community service, by 16 per cent. Alberta and Saskatchewan have advanced slightly over 10 per cent. More than 79 per cent of the total expenditures for 1943 were the responsibility of the larger cities.

The number of registered borrowers in the public libraries in the Dominion increased from 1,045,521 in 1939 to 1,105,990 in 1943. There was, however, a decrease in the number of books circulated, the total falling from 20,728,151 in 1939 to 20,056,094, the decrease being due to a reduction in the circulation of books for adults and the closing of a number of small libraries in the West. Circulation of adult fiction volumes fell from 10,225,813 in 1939 to 9,120,203, and adult non-fiction from 3,997,336 to 3,726,994. In the juvenile class, the number of books circulated increased from 5,707,948 in 1939 to 6,227,433. The number of books on the shelves of public libraries increased from 5,175,611 in 1939 to 5,681,291.

Ontario, the prairie provinces and British Columbia report from 22 to 30 per cent of the population as registered borrowers. This includes children. The cities of Ontario that segregate the membership of boys and girls from adults, report 36 per cent of their borrowers as juveniles. The prairie provinces report 33 per cent and British Columbia 25 per cent.

Recent recommendations for the establishment of new libraries propose two books per person in cities of 10,000 to 200,000 and suggest three books per person to provide a

more adequate selection. The book stock per capita for cities of 100,000 and over is 0.9; for cities 25,000 to 99,999 it is 1.08; and for the smaller cities, 10,000 to 24,999, the rate is 1.3.

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#### Cheques Cashed Against Individual Accounts

Active economic conditions were reflected in the amount of cheques cashed in clearing centres during the first month of 1946. The total was \$5,991,000,000 as compared with \$5,070,000,000 in the corresponding month of last year. The increase of 18.2 per cent reflected expansion in business and speculative transactions at a somewhat higher level. Advances were shown in each of the five economic areas, the greatest percentage increase having been recorded in British Columbia. Twenty-eight of the thirty-three clearing centres showed advances in January over the same month of 1945.

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#### Reports Issued During the Week

1. Car Loadings on Canadian Railways - Weekly (10 cents).
  2. Railway Revenue Freight Loadings, January (10 cents).
  3. Cheques Cashed Against Individual Accounts, January (10 cents).
  4. Commercial Failures, 1945 (10 cents).
  5. Canada's Domestic Exports by Countries, January (10 cents).
  6. Summary of Canada's Domestic Exports, January (10 cents).
  7. Monthly Dairy Review of Canada, January (10 cents).
  8. Gold Production, December (10 cents).
  9. Financing of Motor Vehicle Sales, January (10 cents).
  10. Canadian Grain Statistics - Weekly (10 cents).
  11. Canned Food Production, 1943 (15 cents).
  12. Mineral Production of Canada, 1943 (\$1.00).
  13. Libraries in Canada, 1942-44 (35 cents).
  14. Canadian Coarse Grains, Quarterly Review (25 cents).
  15. Galvanized Sheets, 1945 (25 cents).
  16. Ammonium Sulphate, 1945 (25 cents).
  17. Automobile Production, January (10 cents).
  18. Copper and Nickel Production, December (10 cents).
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