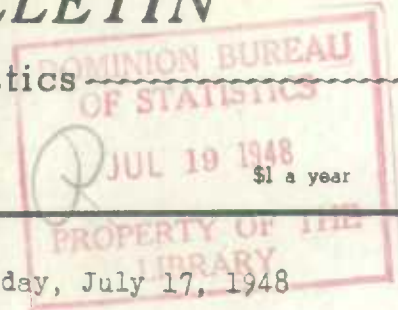




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--- HIGHLIGHTS OF THIS ISSUE ---

CANADA'S ADVERSE TRADE BALANCE with the United States dropped to \$28,700,000 in May, down 72 per cent from the record high of \$102,700,000 in May, 1947.

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FAVOURABLE TRADE BALANCE WITH ALL COUNTRIES in May was \$62,400,000, compared with a deficit of \$11,600,000 in April, and a credit balance of \$30,900,000 in May, 1947.

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MERCHANDISE IMPORTS IN MAY were valued at \$225,100,000 compared with \$240,300,000, and were featured by a further drop in total from the United States, which fell from \$184,708,000 a year ago to \$144,966,000.

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PRODUCTION OF STEEL INGOTS and castings, and pig iron, both reached high points in May, the former amounting to 289,600 tons against 244,100 last year, and the latter, 193,300 tons against 160,200.

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DOLLAR VOLUME OF RETAIL SALES was eight per cent higher in May than in the corresponding month last year.

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CANADIAN RAILWAYS HAD OPERATING REVENUES of \$70,841,880 in April, an increase of 10.8 per cent over April last year.

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ESTIMATED LABOUR INCOME for Canada rose to \$540,000,000 in April from \$533,000,000 in March and was \$65,000,000 larger than in April last year.

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DEPARTMENT STORE SALES increased 23 per cent in June over the corresponding month of 1947.

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OUTPUT OF CRUDE PETROLEUM and natural gasoline in April advanced to 795,700 barrels from last year's total of 602,100 barrels.

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STOCKS OF CANADIAN WHEAT in store or in transit in North America at midnight on July 1 amounted to 48,339,800 bushels compared with 67,668,800 a year ago.

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STOCKS OF CREAMERY BUTTER in nine cities of Canada on July 9 totalled 19,324,000 pounds as compared with 16,217,000 a week earlier.

TRADE DEBIT WITH UNITED STATES
SHARPLY LOWER IN MAY

Continuing the shrinkage of the preceding five months from levels of a year earlier, Canada's adverse trade balance with the United States dropped to \$28,700,000 in May, down 72 per cent from the record month's high of \$102,700,000 in May last year and also substantially below the figure of \$48,000,000 for April this year, according to trade figures released by the Dominion Bureau of Statistics. The May figure brought the adverse trade balance with the United States for the year to date to \$184,600,000 as compared with \$397,500,000 for the January-May period in 1947.

The sharp reduction in the debit balance with the United States in May was the joint result of a substantial decline in Canadian imports from that country and a gain of nearly equal dollar size in shipments to American customers. Imports dropped to \$145,000,000 compared with \$184,700,000 in May last year, and domestic exports to the United States rose to \$114,700,000 as against \$79,800,000. Foreign exports were slightly lower at \$1,600,000 compared with \$2,200,000.

Canada had a favourable trade balance (including foreign exports) with all countries of \$62,400,000 in May as compared with a trade deficit of \$11,600,000 in April and a credit balance of \$30,900,000 in May, 1947. Domestic exports of merchandise totalled \$282,300,000 in May compared with \$267,800,000 last year, while imports from all countries aggregated \$225,100,000 compared with \$240,300,000.

There was a favourable balance of trade with all countries during the five months ended May amounting to \$145,800,000 as compared with \$43,200,000 in the like period of 1947. Domestic exports in the five months aggregated \$1,166,600,000 compared with \$1,055,800,000 last year and foreign exports, \$16,300,000 compared with \$13,100,000; while imports increased slightly to \$1,037,100,000 against \$1,025,700,000.

FURTHER DROP IN IMPORTS FROM UNITED STATES; UP FROM UNITED KINGDOM

Featured by a further sharp drop in imports from the United States, Canada's merchandise import trade in May declined to \$225,100,000 from the preceding month's figure of \$226,700,000, and \$240,300,000 in the corresponding month last year, according to the Dominion Bureau of Statistics. Purchases from the United Kingdom and Latin American countries as a group continued to rise. During the five months ending May imports from all countries were valued at \$1,037,100,000, showing a slight rise over the 1947 five-month aggregate of \$1,025,700,000.

There were declines in May in all of the nine main commodity groups except non-metallic minerals. Decreases in most instances were of moderate proportions, the most pronounced being registered by the fibres and textile group. Among the individual commodities, there were declines in fruits, vegetables, cotton products, and automobiles. Nuts, flax, hemp and jute, farm implements, mining and metallurgical machinery, crude petroleum and petroleum products were among the larger advances.

Imports from the United States in May were valued at \$144,966,000 as compared with \$184,708,000 in May last year, the decline of \$39,742,000 comparing with \$22,100,000 in April and \$26,800,000 in March. Aggregate imports for the five months ending May were \$729,550,000 compared with \$806,270,000 in the similar period of 1947, a decrease of 9.6 per cent.

Imports from the United Kingdom were valued at \$27,424,000 in May -- a new postwar monthly high figure -- as compared with \$24,600,000 in April and \$15,170,000 in May last year. In May, 1938, the value was \$11,930,000. For the five months ending May the aggregate was \$113,127,000 as against \$66,518,000 in the like period of 1947.

Total imports from Latin America rose again in May, being valued at \$18,547,000 as compared with \$12,518,000 a year ago, Brazil, Cuba, Mexico and Venezuela accounting for the major part of the advance. The five-month total stood at \$87,339,000 as compared with \$57,233,000 a year ago. Imports from European countries for the month amounted to \$7,199,000 as against \$5,723,000 a year ago, and in the five months totalled \$22,292,000 compared with \$21,371,000.

Imports from India and Pakistan together rose from \$2,747,000 in May last year to \$7,370,000, Jamaica from \$163,000 to \$2,019,000, British Guiana from \$1,030,000 to \$1,743,000, Australia from \$1,935,000 to \$2,254,000, and Fiji from nil to \$1,111,000. Total from Barbados was reduced from \$3,307,000 to \$1,325,000, Gold Coast from \$1,967,000 to \$609,000, Ceylon from \$1,525,000 to \$731,000, British Malaya from \$3,020,000 to \$1,344,000, and New Zealand from \$1,714,000 to \$608,000.

Among the commodity groups, the non-metallic minerals rose in May to \$45,600,000 from \$38,800,000 in the corresponding month last year, crude petroleum increasing from \$12,349,000 to \$15,952,000, petroleum products from \$5,815,000 to \$7,473,000, and coal from \$10,730,000 to \$10,310,000. Group total for iron and products fell from \$68,660,000 to \$66,214,000, other non-ferrous machinery declining from \$14,692,000 to \$13,450,000, automobiles from \$6,528,000 to \$2,405,000, and cooking and heating apparatus from \$1,406,000 to \$529,000. Rolling mill products rose from \$6,661,000 to \$6,989,000, farm implements and machinery from \$9,601,000 to \$11,706,000, and engines and boilers from \$3,371,000 to \$4,567,000.

The fibres and textile group of commodities down in earlier months, was further advanced during May, being valued at \$34,142,000 as against \$40,426,000. Sharpest drop was shown for cotton products, which fell from \$12,726,000 to \$6,837,000. Wool products were higher at \$6,449,000 compared with \$5,195,000, and artificial silk products lower at \$2,490,000 as against \$3,935,000. Flax, hemp and jute rose from \$2,840,000 to \$4,090,000, and raw and unmanufactured wool from \$4,179,000 to \$5,290,000.

In the agricultural and vegetable products group, which fell from \$34,631,000 in May last year to \$32,095,000, fruits declined from \$7,546,000 to \$4,344,000, vegetables from \$3,802,000 to \$1,090,000, and rubber and products from \$3,525,000 to \$2,034,000. Nuts advanced from \$933,000 to \$4,166,000.

The animal products group total was \$5,718,000 as compared with \$6,822,000 in May last year, furs advancing from \$1,425,000 to \$2,120,000 and "other" animals and products being down from \$2,156,000 to \$1,661,000. The wood and paper group was off from \$8,169,000 to \$6,429,000, while the non-ferrous metals total was down slightly from \$15,418,000 to \$15,062,000.

The remaining groups -- chemicals and miscellaneous commodities -- both were lower, the former falling from \$11,757,000 to \$10,033,000, and the latter from \$15,635,000 to \$9,847,000.

CONDITIONS OF FIELD CROPS Crop prospects for wheat, oats and barley at June 30 this year were considerably less favourable than at the same time last year, according to numerical condition figures released by the Dominion Bureau of Statistics. Rye and flaxseed condition figures were somewhat less than a year ago whereas figures for other crops were nearly the same or slightly higher than those of 1947. Adverse weather in the Prairie Provinces pulled down the average for all Canada especially for wheat and to a lesser degree oats and barley and flaxseed. Fall rye, however, although somewhat lower, has fared better than the other major grain crops. Minor crops are grown more extensively in the eastern provinces and favourable weather this year has resulted in higher condition figures for peas, beans, buckwheat, mixed grains, potatoes and root crops. Hay and clover and pasture conditions are only slightly less favourable than at the same time last year.

The spring wheat condition figures for the Prairie Provinces based on weather factors indicated poorer yields in prospect at June 30 this year than at the same time a year ago when prospects were good. In Alberta and Saskatchewan wheat conditions declined 29 and 34 points respectively, from the reported condition at June 30 a year ago. The decline for Manitoba was not so great and prospects in this province were still above the long-term average.

Prospects for feed grain crops in the Prairie Provinces were also not as encouraging as last year at June 30. Greatly improved conditions in eastern Canada, over a year ago, however, will serve to make up in part for anticipated reductions in output of these crops. In Ontario the condition of the winter wheat crop at 97 points was six points above last year. Other grain crops show greater improvement over the low points reached last year in all eastern provinces except Nova Scotia. In this province wet, cold weather delayed seeding operations and retarded growth. Hay and fodder crops in British Columbia were above normal but, with the exception of spring rye, grain crops are generally 10 to 15 points below normal. Crop conditions throughout this province are extremely variable as a result of the late season and subsequent floods.

Above normal temperatures and continued lack of rainfall have prevailed over the greater part of Alberta and Saskatchewan since July 1. Good rains were received in Manitoba during this period and fair to good rainfall occurred in eastern Saskatchewan, north-eastern Alberta and in the Peace River district. Elsewhere practically no precipitation was received with the result that large areas of crop land in Saskatchewan and Alberta urgently require rain. Favourable weather has prevailed in Ontario since July 1 and the outlook for all crops is excellent.

For all Canada, the condition of field crops at June 30, 1948, expressed in percentage of the long-time yields per acre, was reported as follows, with figures for June 30, 1947 within brackets: fall wheat 97 (91); spring wheat 95 (125); all wheat 95 (125); oats 80 (88); barley 78 (91); fall rye 79 (85); spring rye 75 (89); all rye 78 (87); peas 90 (84); beans 96 (76); buckwheat 96 (87); mixed grains 96 (74); flaxseed 83 (93); corn for husking 94 (78); potatoes 95 (83); turnips, etc. 93 (82); hay and clover 94 (94); alfalfa 92 (91); fodder corn 94 (80); sugar beets 90 (89); pasture 97 (99).

In the Prairie Provinces, the condition of the principal cereal crops at June 30, 1948, was reported as follows, with the figures for June 30, 1947 within brackets: Manitoba - wheat 113 (126); oats 88 (92); barley 87 (92); rye 92 (91); flaxseed 90 (91). Saskatchewan - wheat 93 (127); oats 68 (91); barley 72 (92); rye 73 (86); flaxseed 75 (95). Alberta - wheat 94 (123); oats 76 (93); barley 76 (93); rye 85 (84); flaxseed 82 (93).

CROP CONDITIONS IN THE PRAIRIE PROVINCES

Crop deterioration was temporarily checked throughout most of the drought area of the Prairie Provinces as a result of good rains and scattered showers during the past week. Despite recent rains, however, only light yields will be received in the western half of Saskatchewan, in east-central Alberta and to some extent in northern areas of Alberta. Crop conditions continue to be good in Manitoba, fair to good conditions have been maintained over the eastern half and north-central Saskatchewan and prospects in south-western Alberta are still very favourable.

General crop conditions continue to be good in Manitoba with only a few districts reporting conditions as too dry. Local rains were received in many parts of the province during the past week and with relatively high temperatures crops made rapid development. Growth of late-sown crops was particularly noticeable. In the province as a whole 75 per cent of the wheat is now in head and coarse grains are beginning to head out.

General deterioration of crops in Saskatchewan has been checked since last report by good rains in west-central areas and widely scattered showers throughout most of the province. It is too late, however, for any extensive recovery and only light yields are anticipated in western and north-western districts. Prospects over central areas range from poor to fair. Fair to good condition has been maintained over the eastern half and north-central parts of the province. A relatively low outturn of coarse grains is anticipated but fall rye prospects over most areas remain fair to good.

Some improvement in crop prospects occurred in Alberta during the past week as a result of good general rains in the Peace River district and fair to good rains or showers in other areas of the province. At the time of reporting good rains were falling over a wide area. Prospects in south-western Alberta are still very favourable but in other areas crops show the effects of the drought and prospects are only fair to poor. Most of the wheat is in the shot blade with a small percentage headed. Coarse grain stands are uneven. There has been no material change in the insect situation.

STOCKS AND MARKETINGS OF WHEAT AND COARSE GRAINS

Stocks of Canadian wheat in store or in transit in North America at midnight on July 1 totalled 48,339,800 bushels compared with 49,706,400 on June 24 and 67,668,800 on the corresponding date last year, according to figures released by the Dominion Bureau of Statistics. During the week ending July 1, deliveries of wheat from Prairie farms amounted to 2,815,900 bushels compared with 4,188,000 in the preceding week.

The following quantities of coarse grains were also delivered from farms in the Prairie Provinces during the week ending July 1, totals for the preceding week being in brackets: oats, 850,100 (1,794,400) bushels; barley, 663,600 (1,060,000); rye, 4,000 (5,200); flaxseed, 84,800 (123,300).

Overseas export clearances of wheat during the week ending July 1 amounted to 2,420,200 bushels compared with 4,135,200 in the same period last year.

STOCKS OF DAIRY AND
POULTRY PRODUCTS

Stocks of creamery butter in Canada on July 1 amounted to 30,832,400 pounds, showing a seasonal increase over the June 1 total which stood at 11,725,900 pounds, but down from last year's July 1 stocks of 42,618,400 pounds, according to the Dominion Bureau of Statistics. Cheese stocks on July 1 were 41,178,700 pounds compared with 27,193,300 on June 1 and 41,940,700 on July 1 last year.

Stocks of evaporated whole milk held by or for manufacturers on July 1 were 16,394,600 pounds compared with 9,671,300 on June 1 and 16,717,900 a year ago, while the holdings of skim milk powder were 10,224,300 pounds compared with 6,710,500 on June 1 and 7,782,400 a year ago.

July 1 stocks of shell eggs amounted to 24,042,900 dozen as against 26,080,900 on the same date last year, while the holdings of frozen egg meats totalled 12,752,000 pounds compared with 13,842,300. Stocks of poultry meat amounted to 10,606,200 pounds on July 1 compared with 12,061,400.

BUTTER PRODUCTION HIGHER
IN JUNE, CHEESE LOWER

Creamery butter production increased 3.2 per cent in June, totalling 44,519,000 pounds compared with 43,127,000 in the corresponding month last year, according to figures released by the Dominion Bureau of Statistics. During the first half of this year 121,941,000 pounds were produced compared with 125,980,000 in the similar period of 1947, a decline of 3.2 per cent. Seven of the nine provinces showed increases in June, while in the six-month period, Alberta alone registered a gain.

Cheddar cheese production in June amounted to 18,040,000 pounds compared with 22,736,000 in June last year, and in the six months ended June, 34,663,000 pounds compared with 47,782,000.

June output of concentrated milk products amounted to 56,310,000 pounds compared with 46,763,000 in the same month last year, bringing the cumulative total to 177,020,000 pounds as against 162,442,000 in the first half of 1947.

STOCKS OF CREAMERY BUTTER
IN NINE CITIES ON JULY 9

Stocks of creamery butter in nine cities of Canada on July 9 totalled 19,324,000 pounds as compared with 16,217,000 on July 1. Holdings were as follows by cities, totals for July 1 being in brackets: Quebec, 2,205,000 (2,069,000) pounds; Montreal, 7,377,000 (6,357,000); Toronto, 3,415,000 (2,671,000); Winnipeg, 2,596,000 (2,103,000); Regina, 212,000 (195,000); Saskatoon, 229,000 (203,000); Edmonton, 1,025,000 (814,000); Calgary, 694,000 (580,000); Vancouver, 1,572,000 (1,225,000).

MEAT STOCKS ON JULY 1

Stocks of meat held by packers, wholesale butchers and cold storage warehouses on July 1 amounted to 103,203,000 pounds compared with 115,790,000 on June 1 and 75,640,000 on the corresponding date last year, according to figures released by the Dominion Bureau of Statistics. Stocks of lard totalled 4,154,000 pounds compared with 2,595,000 a year ago.

Increases were shown in the stocks of all types of meat on July 1 as compared with the same date last year. Pork holdings were 74,060,000 pounds (55,625,000 on July 1, 1947), beef 21,261,000 (13,108,000), veal 5,803,000 (5,486,000), mutton and lamb, 2,080,000 (1,422,000).

PRODUCTION OF POULTRY AND EGGS Net production of farm eggs in 1947 totalled 373,696,000 dozen as compared with 325,563,000 dozen in 1946. The value of eggs sold and used for consumption and for hatching on farms in 1947 amounted to \$135,298,000, while in 1946 the revised value was \$113,988,000. Eggs produced in 1947 elsewhere than on farms were estimated at 33,680,000 dozen with a net value of \$12,586,000. For 1946 the comparable figures were 28,778,000 dozen valued at \$10,310,000.

During 1947, 56,252,000 farm poultry weighing 301,389,000 pounds were sold or used for poultry meat at a value of \$81,667,000 compared with 51,815,000 birds weighing 265,171,000 pounds sold for \$73,751,000 in 1946. In addition to the farm birds, producers elsewhere than on farms sold or used for meat 23,105,000 pounds valued at \$6,308,000 in 1947 compared with 20,095,000 pounds valued at \$5,644,000.

COLD STORAGE HOLDINGS OF FISH Stocks of fish in cold storage on July 1 totalled 34,810,000 pounds compared with 31,256,000 on June 1 and 35,847,000 on July 1 last year, according to figures released by the Dominion Bureau of Statistics. Holdings of cod fell from 7,830,000 pounds on July 1 last year to 5,626,000, haddock from 2,058,000 pounds to 1,964,000, sea herring and kippers from 6,663,000 pounds to 6,602,000, and other sea fish from 14,941,000 pounds to 14,421,000. Salmon stocks advanced from 1,878,000 pounds to 2,805,000.

INDEX NUMBERS OF FARM PRICES FOR AGRICULTURAL PRODUCTS The index number of prices received by Canadian farmers for agricultural products, on the base 1935-39=100, advanced to a new high of 239.3 during May as compared with 234.2 a month earlier and 199.8 a year ago, according to the Dominion Bureau of Statistics. Compared with May 1947, the index numbers for all provinces registered substantial increases with higher prices for grains, livestock, dairy products, potatoes and poultry and eggs. Compared with the preceding month, a gain of 5.2 points was due mainly to the increased prices for livestock and potatoes.

The following are provincial indexes for May, with those for May last year in brackets: Prince Edward Island, 279.1 (168.4); Nova Scotia, 222.7 (179.7); New Brunswick, 267.2 (191.7); Quebec, 260.1 (205.5); Ontario, 247.3 (194.6); Manitoba, 238.0 (204.7); Saskatchewan, 219.9 (198.4); Alberta, 233.5 (208.5); British Columbia, 234.5 (200.5).

CARLOADINGS ON CANADIAN RAILWAYS Carloadings on Canadian railways for the week ended July 3 showed the effect of the holiday on July 1 and declined to 71,115 cars from 73,906 cars for the preceding week but were 3.4 per cent above the 1947 total of 68,766 cars, according to the Dominion Bureau of Statistics.

Grain loadings were considerably lighter than last year, declining from 6,374 to 5,044 cars. Grain products decreased from 2,845 to 2,491 cars and live stock from 1,808 to 1,341 cars, but practically all other commodities listed showed increases. Coal increased from 4,230 to 5,033 cars, pulpwood from 5,820 to 6,353 cars, gasoline and oils from 3,898 to 4,513 cars, iron and steel products from 1,123 to 1,520 cars and l.c.l. merchandise from 15,125 to 15,715 cars.

COST-OF-LIVING INDEXES
FOR EIGHT REGIONAL CITIES

The Dominion Bureau of Statistics has released cost-of-living indexes for eight regional cities for June 1, together with those for May 1 and June 2, 1947. Increases were recorded for each of the eight cities between May 1 and June 1, gains ranging between 1.1 points for Toronto and 0.7 points for Saskatoon. This compares with an increase of 1.0 in the Dominion composite index over the same period. Of the city index group changes, food continued to be the principal supporting factor followed by generally higher prices for clothing. Fuel costs were higher at eastern centres while the removal of the federal tax on theatre admissions was reflected in a decline in the miscellaneous index in several cities.

The city indexes show changes in living costs for each city and compare the extent of the price rises between cities. They do not, however, compare actual levels of living costs.

The following table compares the latest city and Dominion cost-of-living indexes:

<u>City</u>	<u>June 2, 1947</u>	<u>May 1, 1948</u>	<u>June 1, 1948</u>
	(August, 1939=100)		
Halifax	131.0	148.3	149.1
Saint John	132.1	151.5	152.3
Montreal	137.7	157.4	158.4
Toronto	133.3	150.5	151.6
Winnipeg	129.7	147.6	148.6
Saskatoon	136.2	156.5	157.2
Edmonton	131.3	148.1	149.0
Vancouver	134.3	153.5	154.3
Dominion	133.8	152.1	153.1

SECURITY PRICE INDEXES

	<u>July 8, 1948</u>	<u>July 2, 1948</u>	<u>June 10, 1948</u>
	(1935-39=100)		
<u>Investors' Price Index</u>			
(100 Common Stocks)	117.7	118.2	120.2
76 Industrials	112.4	112.3	114.7
16 Utilities	127.3	129.2	132.6
8 Banks	129.4	128.6	128.0
<u>Mining Stock Price Index</u>			
(30 Stocks)	78.5	78.8	82.1
25 Golds	60.1	60.0	63.6
5 Base Metals	115.4	116.7	119.0

ESTIMATES OF CANADIAN
LABOUR INCOME IN APRIL

Although there was no appreciable change in employment, the estimated labour income for Canada rose to \$540,000,000 in April from \$533,000,000 in March, 1948. The total is \$65,000,000 larger than the corresponding figure for April, 1947, and about 32 per cent or \$132,000,000 greater than in April, 1947.

Higher levels of average weekly earnings were responsible for the increase from March, which paralleled a one per cent rise in the cost-of-living index over the two months. The increase from April, 1947 reflects increased employment as well as higher average earnings. Moreover, time loss through labour disputes was 49,000 working days in April, 1948 as compared with 366,000 dozen in April, 1947.

Only in logging did labour income payments show a sharp decline from March to April. This was the result of seasonally lower employment in the industry, the index of employment showing a 36 per cent drop. The slack in the total of wages and salaries in logging, however, was somewhat taken up by an increase in total compensation to paid workers in agriculture. In this industry, average earnings by May 15 had reached higher levels than at any time since the inception of farm wage-rate records in 1914.

A gain of \$5,000,000 in labour income occurred in manufacturing. Although the overall index of employment in manufacturing was slightly lower at the end of April, average weekly earnings which stood at \$39.60 on April 1, had risen to \$40.75 by May 1.

With the beginning of summer activity in the construction industry, labour income showed a \$4,000,000 gain. The value of contracts awarded rose from \$43,000,000 in February to \$51,300,000 in March to \$80,800,000 in April, giving impetus to higher levels of employment and earnings.

EMPLOYMENT AND PAYROLLS AT MAY 1

There was a contraction in the volume of employment afforded by leading establishments in the major industrial divisions at May 1 when the loss was the fifth in as many months. Unusually pronounced declines of a seasonal nature were recorded in logging, and there were slight reduction in manufacturing and in trade. On the other hand, heightened activity was indicated in mining, transportation, communications, construction and maintenance, hotels and restaurants and dry-cleaning establishments. The falling-off in trade and manufacturing was contra-seasonal, as was the increase in mining.

The working force of 18,802 establishments from which data were received by the Bureau totalled 1,923,171 persons. This was 7,926 below the April 1 figure. Curtailment had been indicated at May 1 in four of the last five years, although in pre-war days an increase in employment was usual at that date. Based on the 1926 average as 100, the index fell from 186.6 at April 1 to 185.8 at the beginning of May, which was 3.5 per cent above the May 1, 1947 figure of 179.6 previously the highest in the record for that date.

Accompanying the general recession in employment indicated at May 1 as compared with April 1 was a considerable increase in the sums disbursed in weekly salaries and wages by the co-operating establishments. The payrolls reported by the leading establishments aggregated \$76,418,725 as compared with \$75,393,110 when the situation had been affected by the observance of the Easter holidays. The latest total represented an average of \$39.74 per person in recorded employment as compared with \$39.04 at April 1.

RAILWAY REVENUES AND EXPENSES IN APRIL

Canadian railways reported operating revenues of \$70,841,830 for April, an increase of \$6,928,325 or 10.8 per cent over the \$63,913,505 earned during the same month last year. This was a new peak for April and was exceeded only by the July 1945 total of \$70,913,046.

Freight revenue, reflecting the rate increase authorized early in the month, rose from \$50,264,762 to a new maximum of \$57,528,004 or 14.4 per cent over the previous April, while the volume of freight carried was off slightly in the same comparison from 13,842,656 to 13,757,759 tons. Passenger revenues resumed the decline from the same month of 1947 at \$6,098,494, off 8.2 per cent. Mail and express accounts were up 7.9 and 5.3 per cent, respectively, with express revenues increasing nearly \$137,000 over April, 1947.

A feature of the month was that the increase in operating expenses did not exceed that in operating revenues. The operating expense account rose from \$55,583,574 in April last year to \$61,569,236 or by \$5,985,662, up also 10.8 per cent. Maintenance expenditures were \$2,648,148 heavier at \$25,059,447, while transportation rose \$2,835,066 to \$30,948,249, an increase of over 10 per cent.

As a result of improved revenues, and reductions in tax accruals, hire of equipment and rental of joint facilities, operating income showed an advance of \$1,210,282 over the same period of 1947 at \$5,538,910 against \$4,328,628.

Revenue freight carried during the month was down 0.6 per cent from the preceding April at 13,757,759 tons, while the total revenue freight ton miles increased 5.8 per cent. The number of revenue passengers transported dropped 14.7 per cent or by 485,045 to 2,821,333, but the average passenger journey increased from 84 to 85 miles.

Total operating pay roll was \$33,269,846 for the month compared with \$30,730,176 one year earlier, an increase of 8.3 per cent, whereas the number of employees rose less than four per cent. The ratio of operating expenses to revenues improved slightly at 86.91 per cent against 86.97 per cent in April, 1947.

PETROLEUM AND NATURAL GAS PRODUCTION IN APRIL

Output of crude petroleum and natural gasoline in Canada during April amounted to 795,700 barrels as compared with 816,500 in the preceding month and 602,100 in the corresponding month last year, according to figures released by the Dominion Bureau of Statistics. Production for the first four months of this year amounted to 3,169,600 barrels as against 2,336,300 in the same months last year.

Alberta's output in April, 1948 was recorded at 702,700 barrels, including 429,700 barrels from Turner Valley field, 179,600 barrels from Leduc field, and 93,300 barrels from other fields. New Brunswick produced 1,700 barrels; Ontario 13,500 barrels; Saskatchewan 37,800 barrels; and Northwest Territories 40,100 barrels.

Production of natural gas in April totalled 5,302,900 M cubic feet as compared with 6,289,500 M in March and 4,406,100 in April, 1947. Output in the four-month period aggregated 24,638,400 M cubic feet as against 21,880,300 M in the same period a year ago.

MAN-HOURS AND HOURLY EARNINGS There was a slight decline in the number of hourly-rated wage-earners reported in manufacturing at May 1 as compared with April 1, accompanied by advances in the weekly total of hours worked and in the aggregate wages. The Dominion Bureau of Statistics tabulated data from 6,410 leading manufacturers with 775,886 hourly-rated wage-earners; this was a decrease of 0.3 per cent from the preceding month.

The hours worked in their factories numbered 33,423,166, exceeding by 3.3 per cent the total for the week of April 1 when the Easter week-end affected the situation. The wages paid for services rendered in these hours aggregated \$29,882,443, being greater by 3.8 per cent than in the preceding period of observation.

The general average of hours worked in the reporting establishments increased from 41.6 at April 1 to 43.1 in the week of May 1. The hourly earnings reported at the beginning of May averaged 89.4 cents, the highest in the record which goes back to November 1, 1944. Previously, the high was 89 cents at April 1, while at May 1, 1947, the average had been 78.3 cents. In manufacturing as a whole the weekly wages averaged \$38.53 at the beginning of May as compared with \$37.02 in the week ending April 1, and \$33.83 in the week of May 1, 1947.

DEPARTMENT STORE SALES UP 23 PER CENT IN JUNE Department store sales increased 23 per cent in June over the same month last year, according to preliminary figures released by the Dominion Bureau of Statistics. Advances were shown for all sections of the country, the Maritimes, Ontario, Saskatchewan and Alberta showing the largest gains. In the Maritimes the advance was 32 per cent, Quebec 19 per cent, Ontario 25 per cent, Manitoba 19 per cent, Saskatchewan 29 per cent, Alberta 28 per cent and British Columbia 18 per cent.

DOLLAR VOLUME OF RETAIL SALES EIGHT PER CENT HIGHER IN MAY Dollar volume of retail sales was eight per cent higher in May than in the corresponding month last year. This increase was somewhat smaller than the average gain in earlier months of the year, the January-to-May comparison showing sales 11 per cent greater than in the same period of 1947. The unadjusted index of sales for May, on the base 1935-39=100, stood at 267.2 compared with 253.3 for April and 247.4 for May, 1947.

Sales in women's apparel shops have advanced sharply this year, the rate of expansion exceeded that of other types of retail outlets. An increase of 16 per cent in May was the same as that shown in the five-month cumulative results. Increases recorded by department and variety stores in May were in excess of the average gain for the 14 trades covered in this series. Variety store sales were up 13 per cent in May and 15 per cent in the first five months of this year. Department store sales gained 13 per cent in May and the same amount in the five months.

Nine of the 14 trades had closely-grouped increases ranging between four and nine per cent in May. Among these were certain durable goods stores, such as furniture and hardware, and food, men's wear and family clothing stores. Jewellery and radio and electrical stores reported lower sales of seven and three per cent, respectively.

PRODUCTION OF IRON AND STEEL
REACH NEW HIGH POINTS IN MAY

Production of steel ingots and steel castings reached a new high point in May, amounting to 289,600 tons as compared with 264,300 tons in the preceding month and 244,100 in the corresponding month last year. Output for the first five months of this year aggregated 1,336,200 tons against 1,245,000 in the same period last year.

The month's output of pig iron also rose to a new monthly high, totalling 193,300 tons in May, and compares with 170,800 in April and 160,200 in May, 1947. Five-month production totalled 847,900 tons against 813,300 in the like period of 1947.

Production of ferro alloys in May rose to the highest point since June 1945, amounting to 18,400 tons as against 14,500 in the preceding month and 15,300 in May, 1947. The June 1945 output totalled 18,500 tons. During the five months ended May, production aggregated 76,200 tons against 61,500 in the same months last year.

REPORTS ISSUED DURING THE WEEK

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32. Production of Iron and Steel, May (10 cents).
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