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--- HIGHLIGHTS OF THIS ISSUE ---

CANADA'S OFFICIAL COST-OF-LIVING INDEX FELL FROM 159.6 to 158.9 between November 1 and December 1, 1948. The fall of 0.7 points was due to a drop in the foods index, all other groups being fractionally higher or unchanged.

CHEQUES CASHED AGAINST INDIVIDUAL ACCOUNTS topped all previously recorded monthly totals in November, amounting to \$8,022,000,000 as compared with \$6,774,000,000 in November, 1947.

DEPARTMENT STORE SALES ROSE 10 PER CENT in November to reach a total of \$89,706,000 as compared with \$81,579,000 in the corresponding month last year.

TOTAL MINERAL PRODUCTION of Canada reached an all-time high value in 1948, with values of main classes of minerals also at record levels.

CANADIAN WHEAT IN STORE OR IN TRANSIT in North America at midnight on December 23 amounted to 172,294,000 bushels, down 2,830,000 bushels from the December 16 figure but up 30,536,000 bushels over last year's corresponding total.

STOCKS OF CREAMERY BUTTER in nine cities of Canada on January 1 this year amounted to 28,665,000 pounds as compared with 28,803,000 a year earlier. Holdings of cheddar cheese totalled 24,051,000 pounds compared with 20,148,000.

SALES OF NEW MOTOR VEHICLES reached a monthly peak for 1948 in November when 21,784 units were retailed for a total of \$41,986,000.

FINANCING OF MOTOR VEHICLE SALES continued above 1947 levels in November when 13,672 units were financed for a total of \$12,693,000 -- 15 per cent higher than the sales of 11,431 vehicles financed for \$11,019,000 a year ago.

DOLLAR SALES OF CANADIAN RETAIL MERCHANTS averaged six per cent higher in November than in the corresponding month of 1947 and were unchanged from October. The average increase for the first 11 months of 1948 was 11 per cent.

ACCIDENTS AT RAIL-HIGHWAY CROSSINGS claimed the lives of 151 persons in Canada in 1947, an increase of 38 over the preceding year.

COST-OF-LIVING INDEX MOVED  
DOWN DURING NOVEMBER

Showing the first decline of any consequence since September, 1945, the Dominion Bureau of Statistics cost-of-living index fell from 159.6 to 158.9 between November 1 and December 1, 1948. During the previous month the index had been unchanged, and the decline during November brought the index back to the same figure as recorded for September 1. The latest index standing compares with 146.0 at December 1, 1947, 127.1 at the same date in 1946, and 120.1 in 1945.

The fall of 0.7 points at December 1 was due to a drop in the foods index, all other group indexes being fractionally higher or unchanged. An unusually sharp decrease in the price of eggs and moderate reductions among meats, vegetables and fruits sent the food index down from 204.7 to 202.0 between November 1 and December 1. In the previous month the food index had declined from 205.4 at October 1, making a two-month's decline of 3.4 points.

As expected, the rent index adjusted quarterly, moved upward, from 121.0 to 121.7, the increase representing the net change from September 1 to December 1. Fuel and light rose fractionally from 129.0 to 129.1, and homefurnishings and services from 166.0 to 166.2. The two remaining group indexes were unchanged, clothing at 181.5 and miscellaneous items at 124.6.

CHEQUES CASHED IN NOVEMBER  
AT ALL-TIME MONTHLY PEAK

Cheques cashed against individual accounts topped all previously recorded monthly totals in November, amounting to \$8,022,000,000 as compared with \$6,774,000,000 in November, 1947. Gains were shown for all five economic areas and all but three of the 33 clearing centres had higher totals.

During the first 11 months of this year the aggregate of cheques cashed was \$72,887,356,000, a rise of more than \$5,200,339,000 over the same period of 1947. Totals for each of the five economic areas, and all but one of the 33 clearing centres moved to higher levels. Relative advances in the Maritime Provinces, Ontario and the Prairie Provinces were greater than in the aggregate for Canada as a whole.

the month, gains ranged from 15.6 per cent for Quebec to 25.9 per cent for the Maritime Provinces. Actual totals for November were as follows by areas, those for November, 1947 being in brackets: Maritimes, \$198,321,000 (\$157,474,000); Quebec, \$2,262,972,000 (\$1,957,010,000); Ontario, \$3,275,765,000 (\$2,737,022,000); Prairie Provinces, \$1,624,869,000 (\$1,356,720,000); British Columbia, \$660,054,000 (\$565,825,000).

STOCKS AND MARKETINGS OF  
WHEAT AND COARSE GRAINS

Stocks of Canadian wheat in store or in transit in North America at midnight on December 23 amounted to 172,294,000 bushels, showing a decline of 2,830,000 bushels from the December 16 figure of 175,124,000 bushels, but 30,536,000 bushels in advance of last year's corresponding total of 141,758,000 bushels.

Deliveries of wheat from farms in the Prairie Provinces during the week ending December 23 totalled 3,071,000 bushels compared with 2,063,000 in the same week a year earlier. Overseas export clearances during the week amounted to 2,913,000 bushels as against 1,069,000 a year ago.

The following quantities of coarse grains were also delivered from farms in the Prairie Provinces during the week ending December 23, totals for the same week of 1947 being in brackets: oats, 735,000 (712,000) bushels; barley, 584,000 (640,000); rye, 131,000 (16,000); flaxseed, 68,000 (26,000).

STOCKS OF BUTTER AND CHEESE Stocks of creamery butter in nine cities of Canada on January 1 this year amounted to 22,665,000 pounds as compared with 28,803,000 on the corresponding date last year. The January 1 stocks included 4,450,000 pounds of imported butter. Holdings of cheddar cheese on January 1 totalled 24,051,000 pounds as against 20,148,000 a year ago. In addition there were 15,561 pounds of imported cheese on hand.

Stocks of creamery butter were as follows by cities on January 1, 1949, those for the same date last year being in brackets (thousands omitted): Quebec, 2,675 (2,098) pounds; Montreal, 8,164 (10,583); Toronto, 3,894 (3,015); Winnipeg, 2,603 (5,772); Regina, 215 (356); Saskatoon, 207 (140); Edmonton, 1,350 (1,990); Calgary, 689 (1,147); Vancouver, 2,868 (3,702).

RETAIL SALES VALUE UP SIX PER CENT IN NOVEMBER Dollar sales of Canadian retail merchants averaged six per cent higher in November than in the corresponding month of 1947 and were unchanged from October, according to the Dominion Bureau of Statistics. The average increase for the first 11 months of 1948 was 11 per cent.

In November, women's wear stores increased six per cent, showing the only gain among the apparel trades. This gain was much below the 17 per cent rise shown in the 11-month cumulative comparison. Men's wear and family clothing stores in November reported sales reductions of six per cent from a year ago, while an even larger decrease of 11 per cent occurred in shoe stores sales. All other trades recorded sales increases, the largest being 12 per cent for radio and electrical and hardware stores and 10 per cent for department stores.

Regional increases for November ranged from nine per cent in the Prairie Provinces to four per cent in Quebec. Gain for British Columbia was eight per cent, Maritime Provinces seven per cent, and Ontario five per cent. In the January-November comparisons, Ontario attained a high of 13 per cent while a low of seven per cent was recorded in the Maritime Provinces.

DEPARTMENT STORE SALES 10 PER CENT HIGHER IN NOVEMBER Department store sales rose 10 per cent in November to reach a total of \$89,706,000 as compared with \$81,579,000 in the corresponding month of 1947. The gain in the month was slightly under the average advance of 13 per cent for the first 11 months of the year. Dollar value of sales for the cumulative period was \$694,904,000 as against \$613,686,000 a year earlier.

With five full days for Christmas shopping in the week ending December 25 this year, department store sales soared 92 per cent over last year's corresponding week which ended December 27 and contained only three pre-Christmas shopping days, according to preliminary figures.

Food departments reported a gain of 19 per cent in the value of November sales. Several other departments showed increases in sales of over 15 per cent, among them being lingerie, piece goods, hardware and stationery. Radio and music departments alone failed to surpass November, 1947 sales volume.

Inventories at the beginning of November were up by 11 per cent, standing at \$186,522,000 as compared with \$167,564,000 a year earlier. Four departments -- millinery, drugs, furniture and radio -- showed declines in inventories. The most substantial growth in stocks occurred in women's apparel, piece goods, home furnishings and shoes.

SALES OF MOTOR VEHICLES  
HIGHER IN NOVEMBER

Sales of new motor vehicles reached a monthly 1948 peak in November when 21,734 units were retailed for a total of \$41,986,000 as compared with 20,690 units sold for \$40,531,000 in the corresponding month of 1947, according to the Dominion Bureau of Statistics.

Cumulative sales for the first 11 months of 1948 were down from a year earlier, totalling 196,098 units sold for \$379,959,000 as compared with 212,607 units sold for \$383,003,000 in the similar period of 1947.

Sales of passenger cars declined to 15,102 units in November from 15,422 in the same month of 1947, while trucks and buses sold advanced to 6,682 from 5,268.

FINANCING OF MOTOR VEHICLE SALES  
INCREASED IN NOVEMBER

Financing of motor vehicle sales continued above 1947 levels in November when 13,672 units were financed for a total of \$12,693,000 -- 15 per cent higher than the sales of 11,431 vehicles financed for \$11,019,000 a year ago. During the 11 months ending November the sales of 143,900 units were financed for a total of \$132,979,000 as compared with 109,600 for \$99,812,000 in the similar period last year.

In November there were 4,729 new vehicles financed for \$6,496,000, of which 3,063 were passenger cars. Financing of trucks and buses was at a lower level, dropping from 1,842 in November, 1947 to 1,666. Used vehicles financed in the month numbered 8,943, up 32 per cent over the 6,802 financed in November, 1947. Passenger models formed a high proportion of the total and showed a gain of 34 per cent.

SECURITY PRICE INDEXES

December 30, 1948      December 23, 1948      December 2, 1948

(1935-39=100)

Investors' Price Index

(100 Common Stocks) . . . . .	115.8	115.0	116.4
76 Industrials . . . . .	111.0	110.4	111.6
16 Utilities . . . . .	120.5	119.0	121.5
8 Banks . . . . .	132.1	131.9	132.5

Mining Stock Price Index

(30 Stocks) . . . . .	85.8	85.9	82.0
25 Golds . . . . .	65.7	65.9	59.8
5 Base Metals . . . . .	126.1	126.1	127.2

AREA OF OCCUPIED FARM LAND  
IN ALBERTA IN 1946

Total area of occupied farm land in Alberta in 1946 was 41,451,000 acres, a decrease of 1,826,000 acres since 1941. The decline was due almost wholly to a decrease in the area of unimproved land, which fell from 23,152,000 acres to 21,420,000 acres. Area of improved land was down only slightly, from 20,125,000 acres to 20,032,000. Of the improved land, 12,866,000 acres were under crops in 1946 compared with 12,284,000 in 1941. The summer fallow acreage was 6,011,000 compared with 6,546,000, while the acreage under pasture was 731,000 compared with 626,000. Prairie or natural pasture comprised the major part of the unimproved farm land -- 18,252,000 acres compared with 18,746,000 in 1941; woodland area was 2,109,000 acres compared with 2,727,000.

CANADA'S MINERAL PRODUCTION VALUE  
REACHED A NEW PEAK FIGURE IN 1948

Total mineral production of Canada reached an all-time high value in 1948, with values of main classes of minerals also at record levels.

According to the preliminary estimate of the Dominion Bureau of Statistics, the year's output amounted in value to \$806,200,000, up 25 per cent above the previous record of \$644,700,000 in 1947. Most of the gain was due to increased prices, but quantities were also generally larger.

The output value of metallics increased 22.4 per cent from \$395,000,000 in 1947 to \$484,000,000. Fuels advanced nearly 44 per cent from \$110,500,000 to \$159,000,000. Other non-metallics gained 19 per cent from \$54,520,000 to \$64,900,000; and structural materials moved up almost 17 per cent from \$84,600,000 to \$98,800,000.

Production of gold at 3.5 million ounces was about a half million ounces greater than in 1947, but still nearly two million ounces less than the record of 5.3 million ounces in 1941. The value, at \$122,339,000, was 14 per cent above the 1947 figure. Silver production amounted to 15.6 million fine ounces valued at \$11,732,000 as compared with 12.5 million fine ounces valued at \$9,003,000 in 1947.

There were substantial increases in the production of copper, lead, zinc, nickel and other base metals. Copper output rose from 451.7 million pounds valued at \$91,542,000 to 479.8 million pounds valued at \$107,100,000, lead from 323.3 million pounds at \$44,200,000 to 336.6 million pounds valued at \$60,700,000, zinc from 415.7 million pounds valued at \$46,700,000 to 464.2 million pounds valued at \$64,700,000, and nickel from 237.3 million pounds valued at \$70,700,000 compared with 257.7 million valued at \$85,600,000.

Coal production at 18.4 million tons was a half million tons below the record reached in 1942, but the value of \$107,299,000 was 70.6 per cent greater than in that year. Striking developments in the Leduc oil field in Alberta were responsible for bringing the output of crude petroleum in the Dominion to a new high of 12 million barrels valued at \$36.8 million. Natural gas, being associated with crude petroleum, increased in output to 56.6 billion cubic feet worth \$14.6 million.

Asbestos production at 707,800 tons worth \$41,300,000 was up seven per cent in quantity and 25 per cent in value from 1947. The gypsum industry again broke its previous high by producing 3,219,000 tons valued at \$5,600,000. Salt production increased to 740,000 tons but the value was slightly lower than in 1947 due to a greater proportion of low-price brine being used by the chemical industry. Sulphur produced in the form of pyrite and sulphuric acid was only slightly less than in the preceding year.

Increased demands by the construction industry resulted in a record output of structural materials. Cement shipments amounted to 14.1 million barrels worth \$27,900,000 as compared with 11.9 million barrels valued at \$22,000,000. Clay products, which includes brick, tile, etc., made from Canadian clay were valued at \$17,300,000. Over a million tons of lime was discharged from the lime kilns in 1947. Stone quarried was in excess of 11 million tons worth \$17,000,000. Each of the industries in the structural materials group reached a new high in value of production.

LUMBER PRODUCTION, SHIPMENTS AND STOCKS IN BRITISH COLUMBIA

Production of sawn lumber and ties in British Columbia was slightly higher in September than in the preceding month but was practically unchanged from a year earlier, according to the Dominion Bureau of Statistics. Shipments were heavier than a year ago, but were down from August, while stocks were up in both comparisons.

The month's output amounted to 236,872 M feet as compared with 231,113 M in August and 236,876 M in September, 1947. Coast mills accounted for 71.5 per cent of the total, and interior mills for the balance of 28.5 per cent.

Shipments in September totalled 226,562 M feet as compared with 222,344 M in the same month of 1947, a rise of 1.9 per cent, with coast mills reporting an increase of 2.7 per cent and interior mills a decrease of 0.6 per cent. Total shipments for September declined by 3.8 per cent from the August figure of 235,557 M feet.

Stocks on hand at the end of September amounted to 272,671 M feet as against 275,671 M at the end of August and 246,342 M in September, 1947. Coast mills reported stocks totalling 184,314 M feet, while interior mills showed 91,357 M feet.

PRODUCTION AND SALES OF ASPHALT ROOFING

Production and sales of asphalt shingles and rolled roofing both were lower in November than in the same month of 1947, according to figures released by the Dominion Bureau of Statistics.

Output in November amounted to 364,000 squares as compared with 458,000 in the same month of 1947. During the first 11 months of 1948, 4,257,000 squares were produced as against 5,130,000 in the similar period of 1947.

In November, sales amounted to 306,000 squares as against 386,000 in the corresponding month of 1947, bringing the aggregate for the 11 months ending November to 4,157,000 squares compared with 4,910,000 in the similar period of 1947.

FELDSPAR AND QUARTZ MINING

Gross value of shipments made by the Canadian feldspar and quartz mining industry in 1947 was \$2,468,000, an increase of \$299,000 over the preceding year, according to the Dominion Bureau of Statistics. The average number of employees rose from 517 in 1946 to 593, while salary and wage payments advanced from \$876,000 to \$1,134,000.

In 1947 there were 38 active firms in the industry and 31 of these properties made shipments during the year. The cost of fuel, electricity, process supplies, containers and freight amounted to \$720,000, which if deducted from the gross output value, yields a net value of \$1,748,000 compared with \$1,728,000 in the preceding year.

FATALITIES HIGHER IN 1947  
IN RAILWAY ACCIDENTS

Accidents at rail-highway crossings claimed the lives of 151 persons in Canada in 1947, an increase of 38 over the preceding year, according to the Dominion Bureau of Statistics in its summary statistics of the operations of steam railways. Twenty-eight of these fatalities occurred at protected crossings, 16 happening in urban areas. Accidents involving motor vehicles accounted for 125 of the fatalities, nine involved other types of vehicles, and the remaining 17 were pedestrians.

In addition to the fatalities, 501 persons suffered injuries at crossings as the result of accidents as compared with 442 in 1946. Accidents in which automobiles were involved accounted for 449 of the number of injured as compared with 377, and other types of vehicles 16 as compared with 20. Trainmen and passengers injured at crossings totalled 28 as compared with 32, and pedestrians eight as compared with 13.

There were 34 passengers killed in train accidents during the year as compared with only two in 1946. The Labor Day collision at Dugald, Manitoba, accounted for 30 of these fatalities. Passenger deaths occurred on only three of the 32 lines operating in 1947.

There were 77 employees killed in accidents resulting from the movement of trains in 1947 as compared with 90 in 1946, and 26 other employees, mostly shopmen and trackmen, met death during 1947 in non-train accidents against 23 in the preceding year. Decided improvement over preceding years is shown in the number of days employees were absent due to injuries, the total declining to 263,470 days compared with 294,258 days in 1946, and 331,667 days in 1945.

DOMESTIC SALES OF FERTILIZERS  
CONTINUE TO INCREASE

The use of commercial fertilizers in Canada has shown marked expansion in the last 20 years, the rise being almost entirely due to a sharply increased consumption of mixtures for general and special purposes. Fertilizer materials, at the same time, have been shipped abroad in substantial volume during recent years.

Combined sales of fertilizer materials and mixtures for consumption in Canada amounted to 672,000 tons during the 12 months ending June 30, 1948 -- highest in the record -- as compared with 661,000 in the preceding 12-month period, and close to four times the sales registered in 1927.

Sales of mixtures in the 12 months ending June, 1948, amounted to 565,000 tons, practically unchanged from the preceding year, but about nine times higher than in 1927. Sales of fertilizer materials in Canada have been relatively stable, amounting to 107,000 tons in 1948, 96,000 tons in 1947, and 105,000 tons in 1927.

Imports of fertilizers in the 12 months of 1947-48 totalled 616,000 tons and included 405,000 tons of natural phosphate rock, 101,000 tons of superphosphate, and 87,000 tons of muriate of potash. In 1947 imports of all types amounted to 640,000 tons. Exports of fertilizers -- very largely materials -- amounted to almost 700,000 tons as compared with 697,000 in the preceding year.

Production of fertilizers during the year comprised 1,078,000 tons of materials and 620,000 tons of mixtures, compared with 1,092,000 tons of materials and 560,000 tons of mixtures in the preceding year.

REPORTS ISSUED DURING THE WEEK

1. Statistics of Steam Railways of Canada, 1947 (50 cents).
2. Area of Field Crops, by Subdivision, 1946; Area and Value of Vegetables, Fruits, Greenhouse and Nursery Products, 1945, and Area, 1946, Alberta (10 cents).
3. Shipments and Inventories of Prepared Stock and Poultry Feeds, October (25 cents).
4. Department Store Sales and Inventories, November (10 cents).
5. Canadian Grain Statistics - Weekly (10 cents).
6. The Fertilizer Trade, July 1, 1947 - June 30, 1948 (25 cents).
7. Price Movements, December (10 cents).
8. Cheques Cashed in Clearing Centres, November (10 cents).
9. Retail Sales, November (10 cents).
10. Stocks of Canadian Butter, Cheese and Eggs in Nine Cities, January 1 (10 cents).
11. Preliminary Estimate of Canada's Mineral Production, 1948 (10 cents).
12. Canadian Statistical Review, November (35 cents).
13. Area and Condition of Occupied Farm Land, Alberta, 1946 (10 cents).
14. Miscellaneous Industrial or Non-Metallic Minerals, 1947 (25 cents).
15. Feldspar and Quartz Mining Industry, 1947 (25 cents).
16. Production, Shipments and Stocks on Hand of Sawmills in British Columbia, September (25 cents).
17. Production and Domestic Sales of Asphalt Roofing, November (10 cents).
18. Sales of New Motor Vehicles, November (10 cents).
19. Financing of Motor Vehicle Sales, November (10 cents).
20. Fertilizer Manufacturing Industry, 1947 (25 cents).
21. Preliminary Report on Coal Statistics, 1947 (25 cents).

Copies of these and other Bureau reports may be obtained on application to the Dominion Statistician, Dominion Bureau of Statistics, Ottawa.

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