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## --- HIGHLIGHTS OF THIS ISSUE ---

CANADA'S INTERNATIONAL ACCOUNTS showed a great improvement in 1948. The credit balance on current account with all countries rose to \$453 million from \$47 million in 1947.

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CANADA'S FOREIGN TRADE in January showed a moderate rise of four per cent over the corresponding month last year, amounting to \$462,800,000 compared with \$445,100,000.

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CANADIAN LABOUR INCOME IN 1948 aggregated \$7,130,000,000, an increase of 14 per cent over 1947. Larger sums were paid out in salaries and wages in all industries except forestry.

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AVERAGE WEEKLY EARNINGS of hourly-rated personnel employed by leading manufacturers at January 1 amounted to \$39.46, a decline of \$2.01 from the December 1 figure, but a rise of \$6.29 over the January 1, 1948 average of \$33.17.

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NUMBER OF COMMERCIAL FAILURES in Canada in 1948 reached the highest total since 1941, and showed an increase of almost 50 per cent over 1947.

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THE INDEX NUMBER OF FARM PRICES of agricultural products for January, on the base 1935-39=100, is estimated at 258.0, down 1.4 points from the revised figure for December, but 17.4 points above January last year.

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DEPARTMENT STORE SALES in February were 10 per cent higher than in the same month last year.

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PRODUCTION OF ELECTRIC ENERGY by central electric stations in Canada was slightly lower in January than in the corresponding month last year.

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FOREIGN VEHICLES ENTERING CANADA on traveller's vehicle permits in February totalled 35,800, an advance of seven per cent over the same month last year.

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SALES OF NEW MOTOR VEHICLES in Canada showed a marked recession during January, dropping 16 per cent in number from January last year.

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STOCKS OF CREAMERY BUTTER in nine cities of Canada on March 11 amounted to 9,118,000 pounds, 18.5 per cent greater than last year's corresponding total.

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CANADIAN LABOUR INCOME  
UP 14 PER CENT IN 1948

According to preliminary estimates by the Dominion Bureau of Statistics, Canadian labour income in 1948 aggregated \$7,130,000,000, an increase of \$895,000,000 or 14 per cent over the preceding year. Larger sums were paid out in salaries and wages in all industries except forestry, in which there was a drop of four per cent.

During 1948, the cost-of-living index averaged 14 per cent higher than in 1947, the same increase as total labour income. From these similar percentage changes, the Bureau observes, it would appear that purchasing power of labour income in the aggregate was fairly well maintained, although average weekly earnings tended to lag slightly behind rising consumer price levels.

In December, labour income totalled \$618,000,000, a decline of \$15,000,000 from the November figure, but an increase of \$67,000,000 or 12 per cent over December, 1947. The decline from November reflects the influence of winter weather on employment in agriculture, construction, water transportation and fishing, together with lower levels of employment in other industries during the holiday season.

The index of employment in nine leading non-agricultural industries averaged about four per cent higher in 1948 than in 1947, while average weekly earnings were 11 per cent higher. Preliminary figures compiled by the Department of Labour show a total of 1,500,000 days less lost in strikes in 1948 than in 1947. (1)

MAN-HOURS AND HOURLY EARNINGS

Average weekly earnings of hourly-rated personnel employed by leading manufacturers at January 1 amounted to \$39.46, a decline of \$2.01 from the December 1 figure of \$41.47, but a rise of \$6.29 over the January 1, 1948 average of \$33.17, according to the Dominion Bureau of Statistics.

A new maximum was reached in the four-year record of hourly earnings, the general average rising to 97.2 cents from 96 cents in the week of December 1 and 86.6 cents a year earlier.

The 773,635 wage-earners for whom a record of man-hours is kept in manufacturing as a whole worked an average of 40.6 hours in the holiday week ending January 1, or 2.6 hours less than in the week of December 1, but 2.3 hours more than in the same week last year. (2)

COMMERCIAL FAILURES HIGHER IN 1948  
THAN IN 1947; DOWN FROM PRE-WAR

The number of commercial failures in Canada in 1948 reached the highest level since 1941 and showed an increase of almost 50 per cent over 1947. Despite the sharp rise, the number was considerably lower than in pre-war years. Liabilities in 1948 were up 56 per cent over the preceding year and were the highest since 1935.

According to figures released by the Dominion Bureau of Statistics, failures in 1948 totalled 813 as compared with 545 in 1947, 1,008 in 1941, 1,392 in 1939, and 1,314 in 1935. Liabilities amounted to \$15,724,000 in 1948 compared with \$10,078,000 in 1947, \$9,134,000 in 1941, \$15,029,000 in 1939, and \$17,567,000 in 1935.

Trade accounted for the greatest number of failures, increasing from 153 in 1947 to 289. Failures in manufacturing numbered 188 as against 152; services of all classes, 144 compared with 92; construction, 77 compared with 57; transportation and public utilities, 30 compared with 20.

In the Maritimes, 23 failures occurred last year compared with 15 in 1947. The number in Quebec rose from 422 to 613, Ontario from 72 to 116, Prairie Provinces from 12 to 20, and British Columbia from 24 to 41. (3)

COST-OF-LIVING INDEXES FOR EIGHT REGIONAL CITIES

Varied price tendencies produced divergent movements in the eight city regional cost-of-living indexes between January and February, 1949. Foods were lower at most centres while miscellaneous items -- notably tobacco, cigars and theatre admissions -- moved up. Increases occurred also for homefurnishings and services, while clothing prices averaged slightly lower in most cities.

According to the Dominion Bureau of Statistics, composite city indexes were unchanged between January 3 and February 1 for Saint John at 156.2; Saskatoon at 162.0; and Vancouver at 160.8. Lower indexes were registered for Toronto, down 0.3 to 154.7; Halifax 0.2 to 152.1; and Edmonton 0.1 to 154.4. Advances occurred for Winnipeg, up 0.4 to 153.8, and Montreal 0.1 to 162.4. In the same period the Dominion index receded 0.1 to 158.2.

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

	<u>February 2, 1948</u>	<u>January 3, 1949</u>	<u>February 1, 1949</u>
	(August 1939=100)		
Halifax .....	144.3	152.3	152.1
Saint John .....	147.7	156.2	156.2
Montreal .....	152.8	162.3	162.4
Toronto .....	147.8	155.0	154.7
Winnipeg .....	144.4	153.4	153.8
Saskatoon .....	151.9	162.0	162.0
Edmonton .....	145.1	154.5	154.4
Vancouver .....	148.7	160.8	160.8
Dominion .....	148.9	158.3	158.2

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

SECURITY PRICE INDEXES

	<u>March 10, 1949</u>	<u>March 3, 1949</u>	<u>February 10, 1949</u>
	(1935-39=100)		
<u>Investors' Price Index</u>			
(106 Common Stocks) .....	107.0	105.8	108.5
82 Industrials .....	101.1	100.0	102.6
16 Utilities .....	113.7	112.3	115.4
8 Banks .....	131.2	130.5	131.7
<u>Mining Stock Price Index</u>			
(30 Stocks) .....	83.4	82.9	86.6
25 Golds .....	67.5	66.5	69.6
5 Base Metals .....	114.5	115.2	120.0

FOREIGN TRADE MODERATELY  
HIGHER IN JANUARY

Canada's foreign trade in January showed a moderate rise of four per cent over the corresponding month last year, amounting to \$462,800,000 as compared with \$445,100,000, according to the Dominion Bureau of Statistics. An advance in the value of merchandise imports accounted for a large part of the gain in the month, domestic exports showing a comparatively small rise, and foreign exports a decline.

The overall favourable balance of trade with all countries amounted to \$15,200,000, slightly less than half the balance of \$33,000,000 in the corresponding month last year, and down sharply from the 1948 monthly average of \$39,400,000.

The month's trade resulted in an adverse balance with the United States of \$47,300,000, showing a marked rise over the December figure of \$9,900,000, and the highest adverse balance since April last year when the figure was \$48,000,000. On the other hand it was only moderately above the January, 1948 figure of \$43,200,000 and compares with the monthly average of \$23,600,000 last year.

The favourable balance of trade with the United Kingdom in the month was \$30,500,000 as against \$24,000,000 in December and \$43,400,000 in January last year. The month's figure was only slightly lower than the 1948 average of \$32,400,000. (4)

MERCHANDISE IMPORTS SLIGHTLY  
HIGHER IN JANUARY

Canada's merchandise imports in January were valued at \$223,800,000 -- a new high figure for the month -- showing an advance of 8.6 per cent over last year's corresponding total of \$206,100,000, according to the Dominion Bureau of Statistics. Gains of moderate proportions were recorded by each of the nine major commodity groups.

Imports from the United States, valued at \$164,801,000, were nearly 10 per cent higher than in the same month last year, while the value of shipments from the United Kingdom at \$25,405,000, rose almost 18 per cent. Imports from Latin American countries as a group fell from \$15,498,000 to \$14,182,000, but the total from European countries rose from \$3,845,000 to \$6,649,000 as the result of general gains.

Imports from Venezuela -- third largest individual source of supply during the month -- amounted to \$7,005,000 compared with \$5,783,000. Merchandise purchases from India were valued at \$3,344,000 compared with \$3,134,000, British Malaya \$1,657,000 compared with \$2,016,000, Brazil \$1,647,000 compared with \$1,884,000, and Belgium and Luxembourg \$1,216,000 compared with \$692,000.

The iron and its products group -- largest of the nine -- rose from \$65,565,000 in January last year to \$73,510,000. Rolling mill products, farm implements and machinery, and engines and boilers were among the larger increases, while business and printing machinery, and other non-farm machinery were among the larger declines. Agricultural products as a group moved up from \$24,502,000 to \$25,633,000, with higher values for fruits, coffee and chicory, cocoa and chocolate, and vegetable oils, and lower totals for sugar and products, and rubber and products.

The fibres and textiles group rose from \$31,452,000 to \$35,146,000, cotton products, wool products and artificial silk moving up, and raw cotton and raw wool to lower levels. The non-metallic minerals group with a value of \$40,207,000 showed little change from a year ago. Values of coal and crude petroleum imports were down slightly, but petroleum products moved higher.

Group total for animal products was \$8,891,000 as against \$8,055,000; wood, wood products and paper, \$6,074,000 compared with \$5,488,000; non-ferrous metals and products, \$12,876,000 compared with \$11,414,000; chemicals and allied products, \$10,869,000 compared with \$9,592,000; and miscellaneous commodities, \$10,579,000 compared with \$9,864,000. (5)

MARKED IMPROVEMENT IN 1948  
IN CANADA'S INTERNATIONAL ACCOUNTS

Canada's international accounts showed a great improvement in 1948. The credit balance on current account with all countries rose to \$453 million from \$47 million in 1947, according to a preliminary statement released by the Dominion Bureau of Statistics. These figures compare with \$363 million in 1946 and \$688 million in 1945.

The improvement of \$406 million in the current account balance with all countries was the main contributor to a rise in Canada's official liquid reserves of \$496 million in 1948 as compared with a reduction of \$743 million in 1947. At the end of 1948 the official liquid reserves amounted to \$998 million.

The increase in the credit balance last year, the Bureau's report states, resulted from a rise in the value of exports of goods and services while the total value of imports of goods and services remained virtually unchanged. Most of the increase in the value of exports of goods and services was due to price increases, since the volume -- in the aggregate -- does not appear to have been much altered, although there were important changes in the volume of different groups of goods and services. On the other hand, the volume of imports was materially reduced, chiefly because of the effects of the Emergency Exchange Conservation program introduced in November, 1947.

Canada's accounts with individual countries and areas showed even greater changes than the overall account. The spectacular rise in the value of exports of goods and services to the United States, combined with a reduction in the value of imports of American goods and services -- due to reductions both in the volume of commodity imports and in other current expenditure -- led to a sharp decline in the current account deficit with that country to \$401 million from \$1,135 million in 1947.

In contrast with this reduction in the debit balance with the United States, the current surplus with the United Kingdom and other overseas countries dropped to \$873 million from \$1,220 million in 1947. These figures include exports of official relief of \$19 million and \$38 million, respectively, in the two years. This reduction of \$347 million was chiefly in Canada's surplus with the sterling area, which fell by \$257 million from \$874 million in 1947 to \$617 million. The surplus with the United Kingdom declined from \$633 million the previous year to \$488 million, as exports fell and imports rose, while the surplus with the rest of the sterling area fell from \$241 million to \$129 million with the sharp reduction of purchases in Canada by this group of countries.

The amount of Canada's exports financed by postwar loans and export credits of the Canadian Government was less in 1948 than in the two preceding years, while exports of relief from Canada financed by official contributions were also lower. In consequence, a larger part of exports to overseas countries yielded convertible exchange than in 1947, thus contributing to the improvement in official liquid reserves. Other capital movements also had favourable effects, whereas in 1947 they resulted in the use of reserves. The chief contribution to the year's capital inflows was the sale of \$150 million of bonds by the Canadian Government in the United States. (6)

UNITED STATES DIRECT INVESTMENTS  
IN CANADA INCREASED IN 1947

There was a slight decline in the aggregate value of non-resident investments in Canada at the end of 1947 as compared with a year earlier. United States direct investments in Canada in companies controlled in the United States, on the other hand, were somewhat higher, continuing the advance recorded the previous year.

According to preliminary figures issued by the Dominion Bureau of Statistics, total value of non-resident investments amounted to \$7,175 million in 1947 as compared with \$7,178 million in 1946. Investments held in the United States increased to \$5,187 million from \$5,157 million the previous year, while those held in the United Kingdom declined to \$1,642 from \$1,668 million and in other countries to \$346 from \$353 million.

American investments in Canada in companies controlled in the United States -- that is, in branch plants -- is placed by the Bureau at \$2,544 million for 1947 as against \$2,428 million for 1946 and \$2,304 million for 1945. The increase of \$116 million on the basis of the preliminary figure for 1947 is closely below the advance of \$124 million in 1946 over 1945.

Canadian direct investments in business outside of Canada increased to \$822 million in 1947 from \$772 million the previous year and \$720 million in 1945. Portfolio holdings of foreign securities by Canadians also increased to \$579 million from \$551 million in 1946 but were down from \$621 million in 1945. These figures are exclusive of investments of insurance companies. (6)

HIGHWAY TRAFFIC INTO CANADA SEVEN  
PER CENT HIGHER IN FEBRUARY

Foreign vehicles entering Canada on traveller's vehicle permits in February totalled 35,800, an advance of seven per cent over the same month last year, according to the Dominion Bureau of Statistics. During the first two months of this year, entries totalled 68,400, an increase of 11 per cent over the same period of 1948. In February, increases were recorded in traffic entering through ports in all provinces except Manitoba and British Columbia.

Totals for the month follow by provinces, figures for February, 1948 being in brackets: Ontario, 20,111 (16,705); Quebec, 7,963 (5,919); British Columbia, 4,879 (8,143); New Brunswick, 2,333 (2,068); Alberta, 302 (218); Manitoba, 176 (216); Yukon Territory, 31 (33); Saskatchewan, 30 (26); Nova Scotia, one (nil). (7)

FARM PRICES OF AGRICULTURAL PRODUCTS

The index number of farm prices of agricultural products for January, on the base 1935-39=100, is estimated at 258.0, down 1.4 points from the revised figure for December, but 17.4 points above January last year, according to the Dominion Bureau of Statistics. A high point of 264.1 was reached by the index in August, 1948.

The decline from the December level was due to lower prices paid for grains other than wheat, livestock, furs, poultry and eggs. The decreases in these commodities more than offset increases recorded for dairy products and potatoes.

Since the publication of the index for December, substantial upward revision has been made in the general level of the index from August, 1945 to date. This revision has been occasioned by the recent announcement that the initial Lakehead price of wheat to western producers would be increased 20 cents per bushel and made retroactive to August, 1945. In addition, the prices of oats and barley for the crop year 1947-48 have been advanced to include the final equalization payments of 5.881 cents per bushel for oats and 6.78 cents per bushel for barley. (8)

STOCKS AND MARKETINGS OF  
WHEAT AND COARSE GRAINS

Stocks of Canadian wheat in store or in transit in North America at midnight on March 3 amounted to 142,997,000 bushels, a decrease of 2,458,000 bushels from the February 24 total, but a rise of 40,897,000 over the same date last year, according to the Dominion Bureau of Statistics.

Deliveries of wheat from farms in the Prairie Provinces during the week ending March 3 were 1,323,000 bushels as compared with 833,000 a year ago. Export clearances during the week totalled 1,864,000 bushels as against 4,984,000.

The following quantities of coarse grains were also delivered from farms in the Prairie Provinces during the week ending March 3, totals for the same week last year being in brackets: oats, 558,000 (324,000) bushels; barley, 550,000 (156,000); rye, 39,000 (4,000); flaxseed, 62,000 (16,000). (9)

STOCKS OF CREAMERY BUTTER  
IN NINE CITIES OF CANADA

Stocks of creamery butter in nine cities of Canada on March 11 amounted to 9,118,000 pounds, 18.5 per cent greater than last year's corresponding total of 7,697,000 pounds, according to the Dominion Bureau of Statistics. Holdings were higher in each of the nine cities with the exception of Winnipeg and Calgary.

Stocks on March 11 were as follows by cities, totals for the comparable date last year being in brackets (thousands omitted): Quebec City, 1,078 (478) pounds; Montreal, 2,616 (2,348); Toronto, 1,875 (1,136); Winnipeg, 945 (1,297); Regina, 161 (102); Saskatoon, 159 (87); Edmonton, 489 (391); Calgary, 328 (417); Vancouver, 1,467 (1,441).

MEAT STOCKS LOWER ON MARCH 1

Stocks of meat held by wholesale butchers and cold storage warehouses were lower on March 1, totalling 72,890,000 pounds against 80,001,000 on February 1 and 132,211,000 on March 1 last year.

Current stocks of frozen meat fell sharply to 45,055,000 pounds from 90,927,000 pounds a year ago. Most marked decline was shown in the holdings of pork which were reduced to 15,885,000 pounds from 52,434,000. Frozen beef stocks fell to 21,446,000 pounds from 28,653,000, veal to 2,482,000 pounds from 2,851,000, and mutton and lamb to 3,757,000 pounds from 6,989,000.

Stocks of fresh meat declined to 12,792,000 pounds from 16,847,000 on March 1 last year. Fresh pork stocks fell to 4,222,000 pounds from 5,911,000, beef to 7,144,000 pounds from 9,926,000, veal to 458,000 pounds from 697,000, and mutton and lamb to 163,000 pounds from 313,000.

Holdings of cured meat were down to 15,043,000 pounds from 24,437,000 on the same date last year, pork falling to 13,591,000 pounds from 23,288,000, and beef to 934,000 pounds from 1,149,000. Lard stocks were 3,452,000 pounds compared with 3,560,000. (10)

STOCKS OF FISH ON MARCH 1

Cold storage holdings of fish on March 1 amounted to 28,513,000 pounds, down from the February 1 figure of 32,207,000 pounds, but up slightly from the 28,286,000 pounds held on the corresponding date last year. Stocks on the latest date comprised 26,810,000 pounds frozen fresh and 1,703,000 pounds frozen smoked.

There were increases over a year ago in the stocks of cod, haddock, and inland fish, but holdings of salmon, sea herring, and other sea fish were lower. Totals follow by kinds, those for March 1, 1948 being in brackets: cod, 3,648,000 (1,573,000) pounds; haddock, 1,198,000 (849,000); salmon, 5,556,000 (9,106,000); sea herring, 6,382,000 (7,696,000); other sea fish, 5,785,000 (7,190,000); inland fish, 5,069,000 (1,872,000). (11)

STOCKS OF FRUITS AND VEGETABLES  
AT THE BEGINNING OF MARCH

Stocks of fruit, frozen and in preservatives on March 1 were lower than at the beginning of February, but were higher than a year ago, according to the Dominion Bureau of Statistics. Holdings amounted to 35,211,000 pounds as compared with 37,245,000 on February 1 and 30,060,000 on the corresponding date last year. March 1 stocks of vegetables, frozen and in brine, were down in both comparisons, amounting to 9,284,000 pounds compared with 11,266,000 on February 1 and 9,764,000 on the same date a year earlier.

Storage stocks of Canadian vegetables on March 1 were all increased over a year ago, potatoes being up from 265,446 tons to 281,233, onions from 4,898 tons to 11,257, beets from 586 tons to 1,075, carrots from 1,775 tons to 9,077, cabbages from 258 tons to 1,640, parsnips from 274 tons to 702, and celery from 20 crates to 4,863.

There were 138 tons of imported onions and 13,631 crates of imported celery on hand on March 1. (12)

FEWER HOGS ON CANADIAN FARMS  
AT DECEMBER 1, 1948

Total number of hogs on farms in Canada at December 1, 1948 is estimated at 4,604,200 which is approximately 14 per cent below the 5,381,200 total at December 1, 1947. Decreases occurred in all provinces but were more pronounced in the Prairie Provinces, where they were slightly more than 20 per cent. The fall pig crop was about 90 per cent of that in 1947. Marketings during 1948, however, were greater in relation to total numbers on farms than in 1947.

Indicating increased farmer interest in swine production, the fall pig crop was considerably above the forecast based on breeding intentions reported at the end of May, while breeding intentions reported in December, 1948 indicate that the spring pig crop this year may be almost 20 per cent larger than last year. Increases are indicated for all provinces with the greatest change expected in Manitoba, where a 37 per cent increase is anticipated. However, the substantial rise in the central provinces, with increases of 22 and 19 per cent indicated for Ontario and Quebec, respectively, will have the most significant effect on the size of this year's spring pig crop. (13)

FIBRE FLAX PRODUCTION The value of fibre flax and seed produced in Canada in the 1948-49 season is estimated at \$1,330,000, showing an increase of 70 per cent over the \$782,000 in the 1947-48 season. Seed accounted for \$275,000 of the total value, graded scutched flax \$800,000, and graded scutched tow \$255,000.

Reversing the downward trend of the past three years, acreage in 1948 amounted to 14,116 compared with 11,003 in the preceding year. Production of flaxseed of fibre varieties in 1948-49 has been estimated at 50,000 bushels, the same as the 1947-48 season.

The yield of scutched fibre and scutched tow both were higher, the former amounting to 1,000 tons compared with 411, and the latter 850 tons compared with 515. (14)

DEPARTMENT STORE SALES HIGHER

Department store sales in Canada in February were 10 per cent higher than in the corresponding month last year, according to preliminary figures. Largest gain of 28 per cent was shown for Alberta, Saskatchewan following with a rise of 18 per cent, Manitoba and the Maritimes each 12 per cent, Ontario nine per cent, and Quebec two per cent. During the week ending March 5, sales for the Dominion increased nine per cent. Alberta again showed the largest rise of 28 per cent. Saskatchewan followed with an increase of 17 per cent, Manitoba 16 per cent, Quebec eight per cent, Maritimes four per cent, and Ontario three per cent. Figures for British Columbia are not available.



SALES OF NEW MOTOR VEHICLES  
DOWN SHARPLY IN JANUARY

Sales of new motor vehicles in Canada showed a marked recession during January, dropping 16 per cent in number from January last year. The decline was due almost entirely to a drop of one-third in passenger car sales, bus sales being slightly lower, but truck sales higher. Owing to higher prices, the drop in total value of sales was only nine per cent.

Total number of new motor vehicles sold in the month, was 11,492 compared with 13,732 a year ago and 21,021 in December. The month's total is the smallest since October 1946, when 11,462 units were sold. The aggregate dollar value of January sales was \$24,677,689 compared with \$26,963,872 in January, 1948 and \$41,057,609 in December.

Passenger cars sold in January numbered 6,216 compared with 9,324 a year earlier and 14,840 last December, being the lowest number since August, 1946. There were sizeable reductions in all provinces except Ontario, where the number fell only seven per cent from a year ago. The dollar value of sales was \$13,158,649, down about 24 per cent from \$17,207,853 in January, 1948.

Truck sales in January numbered 5,221 with a retail value of \$10,518,670, up from 4,336 units with a selling value of \$8,443,192 in January last year. Sales of commercial vehicles were lower in the Maritime Provinces, Quebec and British Columbia, but substantially higher in Ontario and each of the Prairie Provinces.

Sales of new buses, reported separately for January for the first time, numbered 55 with a value of \$1,000,370 as compared with 72 valued at \$1,312,827 a year ago. (15)

PRODUCTION OF ELECTRIC ENERGY

Production of electric energy by central electric stations in Canada was slightly lower in January than in the corresponding month last year. The month's output amounted to 3,697,435,000 kilowatt hours compared with 3,754,174,000.

Consumption of primary power rose to 3,404,571,000 kilowatt hours from 3,397,380,000 a year ago, while the figure for secondary power was lower at 143,678,000 kilowatt hours compared with 227,866,000.

Gross exports to the United States during the month amounted to 151,581,000 kilowatt hours compared with 136,292,000 in the same month last year. (16)

REFINED PETROLEUM PRODUCTION  
UP 11 PER CENT IN 1948

Output of refined petroleum products in Canada in 1948 was almost 11 per cent higher than in 1947, major increases being in motor gasoline, kerosene, and fuel oils. The year's aggregate output amounted to 80,969,000 barrels as compared with 73,077,000 in 1947.

During the year, 89,275,000 barrels of crude petroleum were received at Canadian refineries as compared with 76,721,000 the year before, an increase of 16.3 per cent. Receipts of imported crude rose to 77,336,000 barrels from 69,828,000, or by nearly 11 per cent, while the supply from Canadian sources increased to 11,939,000 barrels from 6,893,000, or by 73 per cent. Domestic crude accounted for over 13 per cent of the total in 1948 as against nine per cent in 1947.

Venezuela was the main source of supply of Canada's crude oil imports in 1948, accounting for 37,567,000 barrels as compared with 27,797,000 in 1947, followed by the United States with 33,071,000 barrels compared with 38,909,000. Arabia was the next largest contributor with 3,643,000 barrels compared with nil the previous year, Trinidad 2,357,000 barrels against 1,088,000, Iran 485,000 barrels against nil, and Mexico 213,322 barrels against 224,731. In 1947, 1,808,756 barrels were imported from Colombia, but none last year. (17)

SHIPMENTS OF PRIMARY IRON AND STEEL

Shipments of primary shapes by Canadian steel mills in 1948 -- exclusive of producers' interchange -- increased 11 per cent over the preceding year, according to preliminary figures released by the Dominion Bureau of Statistics. During the year, 2,622,900 tons were shipped as compared with 2,355,463 in 1947. Shipments in December declined to 212,886 tons from 219,363 in November, but showed a substantial gain over the 178,273 in the corresponding month a year earlier.

Producers' interchange, or the tonnage shipped to producers' own works for further processing totalled 965,801 tons in 1948 as compared with 806,347 a year ago, and in December, 66,005 tons compared with 77,298 in November and 84,376 in December, 1947.

The following were the destinations of shipments during the year, figures for 1947 being in brackets: railways and railway car shops, 556,570 (462,845) tons; pressing, forming and stamping plants, 137,112 (131,276); merchant trade products, 313,314 (250,274); building construction, 295,227 (274,168); containers industry, 196,809 (172,046); agricultural equipment, 119,492 (107,360); automotive industry, 139,708 (138,562); machinery plants, 142,448 (164,152); shipbuilding, 48,503 (45,551); mining, lumbering, etc., 79,898 (80,532); miscellaneous industries, 12,846 (14,848). (18)

OUTPUT OF CLAY PRODUCTS UP SUBSTANTIALLY

With all categories of clay products showing substantial increases in 1948 over the preceding year, producers' sales of products made from Canadian clays rose to an all-time record value of \$17,228,000, up sharply from \$13,974,000 in 1947. During the month of December, sales amounted to \$1,471,634, declining from the record monthly high of \$1,744,840 in November, but up moderately over the \$1,150,390 in December, 1947.

Sales for the year 1948 were as follows, those for the preceding year being in brackets: building brick, \$9,400,942 (\$7,566,449); structural tile, \$2,408,563 (\$2,010,522); drain tile, \$842,305 (\$710,354); sewer pipe, \$2,156,875 (\$1,646,880); fireclay blocks and shapes, \$319,519 (\$278,268); pottery, \$1,272,168 (\$1,075,945); other clay products, \$827,645 (\$685,563). (19)

OUTPUT OF CONCRETE BLOCKS

Production of concrete building blocks by manufacturers which normally account for 85 per cent of the total for Canada, amounted to 3,080,083 in January compared with 2,095,116 in the same month last year. Output of concrete brick rose to 1,726,438 from 1,702,209 in the preceding month and 606,360 in the same month a year ago. Production of drain pipe, sewer pipe, water pipe and culvert tile declined in both comparisons, falling to 6,876 tons as compared with 8,376 in December and 9,690 in January last year. (20)

STOCKS OF HIDES AND SKINS AND PRODUCTION OF FINISHED LEATHER

Stocks of raw cattle hides held by tanners, packers and dealers at the end of January amounted to 478,247, a decrease of three per cent from the preceding month's figure of 493,794, and down 31.8 per cent from last year's corresponding total of 701,714. Stocks of calf and kip skins fell from 703,945 a year ago to 576,400, goat and kid skins from 145,216 to 86,404, horse hides from 64,468 to 25,983, while sheep and lamb skins were up from 66,096 dozen to 70,044 dozen.

Production of cattle sole leather in January totalled 1,702,806 pounds as compared with 1,942,806 in the same month a year earlier, cattle upper leather 3,085,692 square feet compared with 3,204,295, and glove and garment leather 564,637 square feet compared with 424,788. Production of calf and kip skin upper leather totalled 1,160,302 square feet in January as compared with 1,354,071 a year ago. (21)

VALUE OF INVENTORIES HELD BY  
MANUFACTURING INDUSTRIES

The estimated total value of inventory held by manufacturing industries at the end of December show a drop of 1.5 points in the index since the end of November, according to the monthly report on inventories and shipments by manufacturing industries issued by the Dominion Bureau of Statistics. The year-end index shows, however, an increase of 8.5 per cent over December, 1947 values.

Of the main industry groupings, inventories of consumers' and producers' goods industries both show slight increases during December, while inventories in the construction goods industries appear to have fallen slightly, and the preliminary figures for inventories of capital goods industries indicate a fall of 16 points in the index. If the latter figures are substantiated by later returns, the value of December inventories in these industries will be at the lowest point since November, 1947. (22)

FISHERIES OF CANADA IN 1947

The marketed value of the products of Canada's fisheries reached a new peak figure of \$124,069,000 in 1947, and showed an increase of 2.4 per cent over the preceding year, according to the advance report on the industry by the Dominion Bureau of Statistics. The total quantity of all kinds of fish taken during the year was 12,208,000 cwt., a decrease of 7.4 per cent from 1946. The sea fisheries accounted for \$110,443,000 or 89 per cent of the total marketed value, and 93.5 per cent of the landings in 1947.

The industry gave employment to 84,050 persons in 1947, although not all of these found year-round employment. The primary operations of catching the fish accounted for 65,419 persons -- 47,249 in the sea fisheries and 18,170 in those of the inland waters -- while the fish processing end of the industry employed 18,631 persons. The primary industry recorded a decrease of 8,095 in the number of employees, and the secondary phase a decline of 765 persons.

The salmon fishery retained the leading position in 1947, the quantity landed increasing by nine per cent. The marketed value was \$36,451,000, an increase of \$11,221,000 or 44 per cent over 1946. Part of the increase was due to the canning in 1947 of cold-storage salmon caught in 1946. Other leading species in order of value: herring, \$17,945,000; cod, \$14,467,000; lobsters, \$10,751,000. (23)

STOCKS AND CONSUMPTION OF  
UNMANUFACTURED TOBACCO

Stocks of unmanufactured tobacco at the end of December amounted to 120,842,000 pounds, showing an increase of four per cent over the 115,937,000 held at September 30 and seven per cent above the 112,262,000 on the corresponding date a year earlier, according to figures released by the Dominion Bureau of Statistics.

PRODUCTION OF LEATHER  
FOOTWEAR IN JANUARY

Production of leather footwear in Canada in January showed a decline of almost 11 per cent from the preceding month, but increased three per cent over the corresponding month last year. The month's output amounted to 2,529,123 pairs as compared with 2,783,922 in December and 2,450,994 in January last year. Of the 2,529,123 pairs produced in January, 758,803 pairs were soled with materials other than leather. (25)

FARM IMPLEMENTS AND MACHINERY INDUSTRY

Gross selling value of products of the farm implements and machinery industry reached a high total in 1947 of \$89,423,469, showing an increase of 41 per cent over the preceding year's figure of \$63,238,542, according to the annual industry report issued by the Dominion Bureau of Statistics. Ontario accounted for 95 per cent of the total output. (26)

CARLOADINGS ON CANADIAN RAILWAYS Carloadings on Canadian railways for the week ended March 5 increased slightly to 73,755 cars from 73,224 cars in the previous week, but were below loadings of 74,610 cars for the corresponding week last year. Grain increased from 4,246 cars last year to 6,142, coal from 5,538 to 6,447 cars, and gasoline and oils from 3,470 to 4,503 cars. Large decreases were recorded for pulpwood, from 8,375 to 5,826 cars, and lumber from 3,720 to 2,981 cars. Livestock declined from 1,850 to 1,443 cars, and miscellaneous freight from 5,325 to 4,873 cars.

REPORTS ISSUED DURING THE WEEK -- (The numbers in this list correspond with those at the end of news items, indicating the report on which an item is based<sup>1</sup>).

1. Monthly Estimates of Labour Income in Canada, December (10 cents).
2. Average Hours Worked and Average Hourly Earnings at Beginning of January (10 cents).
3. Commercial Failures, 1948 (10 cents).
4. Monthly Summary of Foreign Trade, January (10 cents).
5. Imports for Consumption, January (10 cents).
6. Canadian Balance of International Payments, Preliminary Statement, 1948 (25 cents).
7. Volume of Highway Traffic Entering Canada on Traveller's Vehicle Permits, February (10 cents).
8. Index Numbers of Farm Prices of Agricultural Products, January (10 cents).
9. Canadian Grain Statistics - Weekly (10 cents).
10. Holdings of Meat, Lard and Tallow, March 1 (10 cents).
11. Cold Storage Holdings of Fish, March 1 (10 cents).
12. Stocks of Fruit and Vegetables, March 1 (10 cents).
13. Livestock Survey, Swine, December 1, 1948 (10 cents).
14. Fibre Flax Report (10 cents).
15. Sales of New Motor Vehicles, January (10 cents).
16. Central Electric Stations, January (10 cents).
17. Refined Petroleum Products, December (10 cents).
18. Primary Iron and Steel, December (10 cents).
19. Products Made from Canadian Clays, December (10 cents).
20. Concrete Building Blocks and Cement Pipe, January (10 cents).
21. Hides, Skins and Leather, January (10 cents).
22. Monthly Report on Inventories and Shipments by Manufacturing Industries, December 1948, Including Annual Summary (25 cents).
23. Advance Report on the Fisheries of Canada, 1947 (10 cents).
24. Quarterly Report on the Stocks and Consumption of Unmanufactured Tobacco, December (25 cents).
25. Production of Leather Footwear, January (10 cents).
26. Farm Implements and Machinery Industry, 1947 (25 cents).
27. Carloadings on Canadian Railways - Weekly (10 cents).
28. Trade of Canada: Articles Exported to Each Country, 1948 (25 cents).
29. Soaps, Washing Compounds and Cleaning Preparations Industry, 1947 (25 cents).
30. Quarterly Bulletin of Agricultural Statistics, October-December, 1948 (25 cents).
31. Transit Report, November (10 cents).
32. Dwelling Attributes and Household Facilities by Tenure, Type and Size of Dwelling for Cities of 30,000 and Over, Prairie Provinces, 1946 (10 cents).
33. Summary Review of the Gold Mining Industry in Canada, 1947 (50 cents).
34. Machine Shops Industry, 1947 (15 cents).
35. Paints and Varnishes Industry, 1947 (25 cents).
36. Monthly Statement by Ports and Highway Traffic at Canadian Border Points, January (10 cents).
37. Primary Iron and Steel Industry, 1947 (25 cents).
38. Radio Receiving Sets, December (10 cents).

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