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--- HIGHLIGHTS OF THIS ISSUE ---

CANADA'S UNFAVOURABLE TRADE BALANCE WITH THE UNITED STATES -- already substantially cut from 1947 -- was whittled slightly lower in November when domestic and foreign exports to that country exceeded Canadian purchases by approximately \$1,500,000 to reduce the debit figure from \$275,400,000 at the end of October to \$273,700,000. This compares with an adverse balance of \$884,200,000 at the end of November, 1947.

IMPORTS ENTERED FOR CONSUMPTION in November were valued at \$238,200,000, down slightly from the year's monthly high total of \$243,400,000 for October but \$9,100,000 higher than in November, 1947. The cumulative total for the 11 months ending November was \$2,405,000,000, slightly above the \$2,379,800,000 for the similar period of 1947.

TOTAL NON-AGRICULTURAL EMPLOYMENT in Canada increased about 75,000 from the first week of September to the week ending November 20, while, as a result of the seasonal decline in farm activity, employment in agriculture fell about 260,000. Unemployment reached 106,000, about 40,000 higher than in early September.

AVERAGE WEEKLY WAGES OF THE HOURLY-RATED PERSONNEL EMPLOYED by leading Canadian manufacturers rose to a new high figure of \$41.16 during the week ending November 1.

STOCKS OF CANADIAN WHEAT IN STORE or in transit in North America at midnight on January 6 amounted to 169,702,000 bushels, up 32,657,000 bushels over last year's corresponding total.

STOCKS OF CREAMERY BUTTER in nine cities of Canada on January 14 amounted to 19,706,000 pounds compared with 24,006,000 on the corresponding date last year.

CANADIAN MANUFACTURERS TURNED OUT 14,264 domestic electric refrigerators and 30,752 domestic washing machines during November, setting new monthly records for each.

CANADIAN COAL PRODUCTION in 1948 amounted to 18,377,000 tons, largest quantity since 1942.

ANNUAL SALARY RATES FOR TEACHERS in the publicly-controlled schools of eight provinces of Canada -- Quebec excepted -- showed an average advance of \$158 between 1948 and 1947, bringing the cumulative average rise since 1939 to \$532.

SMALL CREDIT BALANCE WITH UNITED STATES  
IN NOVEMBER MERCHANDISE TRADE

Canada's unfavourable trade balance with the United States in 1948 -- already substantially cut from 1947 -- was whittled slightly lower in November when domestic and foreign exports to that country exceeded Canadian purchases by approximately \$1,500,000 to reduce the debit figure from \$275,400,000 at the end of October to \$273,700,000. This compares with an adverse balance of \$884,200,000 at the end of November, 1947.

Both import and export trade with the United States in November reached the highest value for any month in 1948, but imports were below the corresponding month of 1947 while exports were sharply higher. The former were valued at \$163,500,000 as compared with \$174,400,000 a year earlier, and exports at \$163,300,000 against \$92,900,000. Re-exports of foreign produce at \$1,700,000 accounted for the slight excess of Canadian sales over imports. The latest result compares with an adverse balance of \$79,800,000 in November, 1947.

In trade with the United Kingdom, Canada had a favourable balance of \$28,600,000 in November as compared with \$36,500,000 in October and \$51,600,000 in November, 1947. For the 11 months ending November, the credit balance aggregated \$365,200,000, down from \$511,800,000 for the similar period of the previous year.

Canada's total merchandise trade in November amounted to \$534,500,000. Imports were valued at \$238,200,000, domestic exports at \$293,900,000 and foreign exports at \$2,400,000, making the favourable balance of trade with all countries slightly above \$58,000,000.

During the 11 months ending November, total trade reached \$5,195,700,000 as against \$4,920,700,000 in 1947, with imports aggregating \$2,405,000,000 against \$2,379,800,000, domestic exports \$2,759,000,000 against \$2,508,700,000, and foreign exports \$31,700,000 compared with \$52,200,000. The overall favourable balance of trade for the period rose to \$385,800,000 as against \$161,100,000 the previous year.

MERCHANDISE IMPORTS UP  
SLIGHTLY IN NOVEMBER

Imports entered for consumption were valued at \$238,200,000 in November, down slightly from the year's monthly high total of \$243,400,000 for October, but \$9,100,000 higher than in November, 1947. This brought the cumulative total for the 11 months ending November to \$2,405,000,000, slightly above the \$2,379,800,000 shown for the similar period of 1947.

Merchandise imports from the United States were again lower in November, falling to \$163,465,000 from \$174,388,000 in the corresponding month of 1947, bringing the aggregate for the first 11 months of the year to \$1,646,409,000 as against \$1,833,016,000 in the like period of 1947.

Continuing the recent upward movement, imports from the United Kingdom advanced to \$28,319,000 in November from \$17,846,000 in the same month of 1947, and in the 11 months to \$274,869,000 from \$169,115,000 a year ago.

Purchases from Latin American countries rose in the month to \$16,579,000 from \$14,168,000, and in the 11-month period to \$204,372,000 from \$147,563,000 a year earlier. Imports from Brazil, San Domingo, and Venezuela were higher both in the month and cumulative period, and were substantially higher from Mexico in the 11-month period but slightly lower in the month.

Imports from European countries moved up in the month to \$7,742,000 from \$4,920,000, and in the 11 months to \$58,568,000 from \$54,216,000. Imports from Belgium, Czechoslovakia, Denmark, France, Italy, and the Netherlands were higher in both periods, but were down from Portugal, Sweden and Switzerland.

Imports from Australia and New Zealand were higher in November and the 11-month period. Purchases from Australia increased to \$2,852,000 in November from \$586,000 a year earlier, and in the 11 months to \$22,850,000 from \$12,997,000. November imports from New Zealand advanced to \$2,582,000 from \$693,000, and in the 11 months from \$10,122,000 to \$11,388,000.

Small increases were recorded in November by seven of the nine main commodity groups, while in the 11 months advances were shown for only three groups. The non-metallic mineral products group showed the largest gain in the month and cumulative period, being imported in November to the value of \$49,166,000 as compared with \$43,289,000 a year earlier, and in the 11 months, \$559,976,000 compared with \$414,584,000. Major increases were in the imports of coal and crude petroleum.

The iron and its products group -- largest of the nine -- rose from \$65,383,000 in November, 1947 to \$70,587,000, and in the 11-month period from \$703,402,000 to \$715,387,000. Imports of household machinery, automobiles and parts and non-farm machinery were lower in the month, while in the 11 months there were declines in hardware and cutlery, household machinery, automobiles, and cooking and heating apparatus. The value of most other commodities were at higher levels.

Fibres and textiles were imported to the value of \$32,618,000 in November compared with \$31,198,000 a year earlier, and in the 11 months, \$322,368,000 compared with \$361,818,000. The month's imports of agricultural and vegetable products were valued at \$35,743,000, slightly higher than in 1947, but the 11-month total fell from \$327,799,000 to \$314,876,000.

Imports of non-ferrous metals and products moved up in November from \$14,162,000 a year earlier to \$14,975,000, but the 11-month total fell from \$149,851,000 to \$141,709,000. The chemicals and allied products group was higher in both periods, the November total rising from \$9,687,000 to \$10,553,000, and in the 11 months from \$104,508,000 to \$108,050,000.

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CANADIAN LABOUR INCOME Canadian labour income in October is estimated at \$637  
HIGHER IN OCTOBER million, showing an increase of \$82 million over the  
corresponding month of 1947, according to the Dominion  
Bureau of Statistics. This total is \$27 million lower than the estimate of \$664  
million for September, owing to the inclusion of \$31 million in retroactive wage  
increases paid to employees of Canadian railway systems in the month. Discounting  
this lump-sum payment, wages, salaries and supplementary income showed a gain of  
\$4 million during the month.

Labour income in the first 10 months of 1948 is estimated at \$5,879 million, about 15 per cent higher than the corresponding total of \$5,117 million in the same period of 1947.

Small increases in October in both employment and average weekly earnings in the nine leading non-agricultural industries contributed to the \$4 million advance over September. At the same time there were seasonal declines in the aggregate wages and salaries paid in the agriculture and fishing industries. The cost-of-living index remained constant at 159.6 during the month.

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UNEMPLOYMENT UP BY 40,000  
BETWEEN SEPTEMBER AND NOVEMBER

Total nonagricultural employment in Canada increased about 75,000 from the first week of September to the week ending November 20, while, as a result of the seasonal decline in farm activity, employment in agriculture fell about 260,000. Unemployment reached 106,000, about 40,000 higher than in early September. At the same time the civilian labour force, made up of the employed and unemployed, declined about 45,000, dropping below 5,000,000 for the first time since the survey in February, 1948.

These figures are based on the Bureau's quarterly sample survey of a scientifically selected sample of the civilian population of Canada, 14 years of age and over, living outside of institutions. The survey started on November 22 and continued during the rest of November and early December. The main aim of the survey is to provide breakdowns of the total population to show the level of employment and unemployment on the basis of the activity of individuals.

Summary figures of the survey show the civilian labour force totalling 4,964,000 as compared with 5,109,000 in September and 4,934,000 in November, 1947. Total employed last November was 4,858,000 as against 4,847,000 a year earlier, and total unemployed 106,000 compared with 87,000. Aggregate number not in the labour force -- persons going to school, keeping house, retired, too old or unable to work -- increased to 4,229,000 from 4,051,000 in September and 4,069,000 in November, 1947.

Agricultural employment fell to 986,000 in the week ending November 20, a decrease of about 80,000 from the first week in November, 1947. Between September 4 and November 20, the number of men employed in agriculture fell from 1,063,000 to 909,000, and of women from 184,000 to 77,000.

Employment outside of agriculture rose from 3,795,000 in the first week of September to 3,872,000 in the week ending November 20, a pattern similar to that observed in 1946 and 1947. Total nonagricultural employment amounted to 3,779,000 in November, 1947. It has increased from 3,268,000 in November, 1945, first year of the survey, by a little more than 600,000.

The estimates of total employment in the different regions for November of 1945, 1946, 1947 and 1948, contained in the table below, show that total employment in Canada has been increasing continuously, although the growth in the last year has been small. With the exception of a small drop in the Prairies, compensated for by an increase in British Columbia, the changes in regional employment since November, 1947, are remarkably small.

Total Employment  
(thousands of persons 14 years of age and over)

	<u>Maritime Provinces</u>	<u>Quebec</u>	<u>Ontario</u>	<u>Prairie Provinces</u>	<u>British Columbia</u>	<u>Canada</u>
Nov. 17, 1945 .....	372	1,236	1,490	886	342	4,326
Nov. 9, 1946 .....	421	1,322	1,654	944	392	4,733
Nov. 8, 1947 .....	421	1,353	1,726	937	410	4,847
Nov. 20, 1948 .....	424	1,360	1,725	926	423	4,858

WAGES OF HOURLY-RATED EMPLOYEES  
IN MANUFACTURING AT RECORD HIGH

Average weekly wages of the hourly-rated personnel employed by leading Canadian manufacturers rose to a new high figure of \$41.16 during the week ending November 1. This was 48 cents higher than the October 1 figure of \$40.68, previously the maximum, and \$4.82 in advance of the November 1, 1947 average of \$36.34, according to the Dominion Bureau of Statistics.

A new high figure was also shown for hourly earnings, the general average for the week of November 1 standing at 95.5 cents as compared with 94.6 during the week of October 1 and 84.7 a year ago. Revisions in the wage rates in animal food products, lumber products, beverages and other industries, together with the release of lower-paid seasonal labour in canneries, contributed to the increase over October 1.

Wage-earners worked an average of 43.1 hours during the week ending November 1 as compared with 43 hours in the week of October 1 and 42.9 a year earlier.

RECORD NUMBER OF FOREIGN  
VEHICLES ENTER C.N.D.A. IN 1948

The number of foreign vehicles entering Canada on traveller's vehicle permits in 1948 was 1,824,000, a new record for this type of traffic and 10 per cent higher than the previous high mark established in 1947. All provinces shared in the increase over the preceding year except British Columbia which suffered from the effects of floods in May and June.

Foreign entries on permits in December totalled 47,500, an increase of 26 per cent over the same month in 1947, whereas similar traffic in December, 1947 showed a decrease of five per cent from the year before.

Ontario showed the largest absolute gain in tourist car entries in 1948, the total rising from 1,005,194 in 1947 to 1,125,956, Quebec being next in order, the year's total increasing from 300,914 to 335,236. Entries into British Columbia fell from 205,216 to 191,572.

New Brunswick had 102,819 entries as compared with 91,298, Alberta 27,662 compared with 23,476, Manitoba 24,516 compared with 24,407, Saskatchewan 11,663 compared with 9,720, Yukon Territory 2,401 compared with 1,527, and Nova Scotia 2,163 compared with 2,119.

SECURITY PRICE INDEXES

January 13, 1949    January 6, 1949    December 16, 1948

(1935-39=100)

Investors' Price Index

(100 Common Stocks) .....	114.9	116.3	115.7
76 Industrials .....	110.0	111.4	111.0
16 Utilities .....	119.6	121.4	119.6
8 Banks .....	133.0	133.6	132.7

Mining Stock Price Index

(30 Stocks) .....	91.1	88.6	85.0
25 Golds .....	71.0	68.5	64.0
5 Base Metals .....	131.2	129.0	127.5

STOCKS AND MARKETINGS OF  
WHEAT AND COARSE GRAINS

Stocks of Canadian wheat in store or in transit in North America at midnight on January 6 amounted to 169,702,000 bushels, down 1,243,000 bushels from the December 30 total, but up 32,657,000 bushels over last year's corresponding total of 137,045,000 bushels, according to the Dominion Bureau of Statistics.

Deliveries of wheat from farms in the Prairie Provinces during the week ending January 6 amounted to 3,439,000 bushels compared with 2,538,000 in the corresponding week last year. Export clearances during the week amounted to 2,780,000 bushels compared with 3,663,000 a year ago.

The following quantities of coarse grains were also delivered from farms in the Prairie Provinces during the week ending January 6, totals for the same week in 1948 being in brackets: oats, 691,000 (858,000) bushels; barley, 672,000 (842,000); rye, 137,000 (22,000); flaxseed, 96,000 (20,000).

CHEESEY BUTTER STOCKS IN  
NINE CITIES OF CANADA

Stocks of creamery butter in nine cities of Canada on January 14 amounted to 19,706,000 pounds as compared with 24,606,000 on the corresponding date last year. Holdings were as follows by cities, totals for the same date in 1948 being in brackets: Quebec City, 2,502,000 (1,781,000) pounds; Montreal, 7,255,000 (8,982,000); Toronto, 3,338,000 (2,677,000); Winnipeg, 2,169,000 (4,862,000); Regina, 207,000 (312,000); Saskatoon, 192,000 (159,000); Edmonton, 1,140,000 (1,622,000); Calgary, 578,000 (1,069,000); Vancouver, 2,325,000 (3,142,000).

STOCKS OF FISH LOWER ON JANUARY 1

Cold storage holdings of fish were lower on January 1, amounting to 37,058,000 pounds as compared with 43,926,000 on December 1 and 40,927,000 on the corresponding date last year, according to the Dominion Bureau of Statistics. Stocks on the latest date comprised 34,466,000 pounds frozen fresh and 2,592,000 pounds frozen smoked.

There were increases over a year ago in the stocks of cod and inland fish, but holdings of salmon, sea herring and other sea fish were lower. Totals follow by kinds, those for January 1 last year being in brackets: cod, 7,224,000 (4,974,000) pounds; haddock, 1,747,000 (1,717,000); salmon, 8,026,000 (12,803,000); sea herring, 4,726,000 (7,536,000); other sea fish, 8,401,000 (11,372,000); inland fish, 4,746,000 (2,525,000).

DEPARTMENT STORE SALES  
INCREASED 12 PER CENT

Department store sales increased 12 per cent during the week ending January 8 this year as compared with the corresponding week a year earlier, according to preliminary figures released by the Dominion Bureau of Statistics. The Maritime Provinces led the Dominion in percentage rise with a gain of 22 per cent, followed by Manitoba with 18 per cent, Quebec 16 per cent, Alberta 16 per cent, Ontario seven per cent, and Saskatchewan seven per cent. Results for British Columbia are not available.

PASSENGER TRAFFIC ON TRANSIT  
SYSTEMS IN SEPTEMBER

September traffic on transit systems was increased over the corresponding month of 1947. The gain shown by urban systems was comparatively small, while that of interurban lines was substantial, according to the Dominion Bureau of Statistics. Urban systems carried 121,250,552 passengers during the month as compared with 121,137,767 in September a year earlier, and interurban systems, 9,555,193 as compared with 8,527,402.

OUTPUT OF ELECTRIC ENERGY  
SLIGHTLY HIGHER IN NOVEMBER

All-Canada production of electric energy by central electric stations was slightly greater in November than in the corresponding month of 1947, while in the 11 months to the end of November it was slightly less than in 1947. Among the principal power-producing provinces, Quebec and Manitoba showed decreases in the month; in the 11 months, Quebec alone registered a decline.

Total for the month amounted to 5,638,095,000 kilowatt hours compared with 3,780,796,000 in October and 3,613,726,000 in November, 1947. The cumulative total for the 11 months ending November was 40,931,797,000 kilowatt hours as compared with 41,256,633,000 in the similar period of 1947.

Primary output in November rose from 3,330,741,000 kilowatt hours in 1947 to 3,507,087,000, but secondary fell from 282,985,000 kilowatt hours to 131,008,000. Cumulative totals show that primary power output rose from 35,257,360,000 kilowatt hours a year earlier to 38,474,677,000, and that for secondary power fell from 5,999,273,000 kilowatt hours to 2,457,120,000.

Quebec's output in November declined to 1,917,168,000 kilowatt hours from 2,067,162,000, and in the 11-month period to 22,794,414,000 kilowatt hours from 23,773,673,000. In Ontario the November output rose from 903,887,000 kilowatt hours to 957,332,000, and in the 11 months from 10,589,802,000 kilowatt hours to 10,646,309,000. British Columbia's total for the month advanced from 248,604,000 kilowatt hours to 321,207,000, and in the cumulative period from 2,708,947,000 kilowatt hours to 3,059,301,000.

November output in Nova Scotia totalled 60,284,000 kilowatt hours compared with 52,610,000, New Brunswick 65,144,000 compared with 36,187,000, Manitoba 177,926,000 (178,747,000), Saskatchewan 72,047,000 (66,204,000), and Alberta 65,465,000 kilowatt hours (58,676,000).

CIVIL AVIATION IN SEPTEMBER

Canadian scheduled and non-scheduled air carriers both had credit balances on their September operations, according to figures for the month released by the Dominion Bureau of Statistics.

Earnings of scheduled carriers amounted to \$2,826,450, showing an increase of 32 per cent over the September, 1947 figure of \$2,138,550. Operating expenses also increased but by a smaller amount and net operating revenues were increased from \$14,544 to \$251,578. This wiped out the operating loss for the first eight months and produced a credit of \$24,589 as against a debit of \$2,002,061 for the corresponding period in 1947.

Non-scheduled carriers also showed improvement in the financial aspects of the month's operations, increasing their revenues from \$534,117 to \$673,919, and their net operating revenues from \$29,558 to \$139,127.

SALES OF PAINTS, VARNISHES  
AND LACQUERS IN NOVEMBER

Sales of paints, varnishes and lacquers by manufacturers which normally account for all but a small percentage of the total Canadian production, amounted to \$5,766,000 in November, up moderately from the November, 1947 total of \$5,717,000, according to figures released by the Dominion Bureau of Statistics. During the first 11 months of the year, sales aggregated \$71,926,000 as compared with \$66,080,000 in the same period of 1947.

PRODUCTION OF DOMESTIC WASHING MACHINES  
AND REFRIGERATORS UP SHARPLY IN NOVEMBER

Canadian manufacturers turned out more domestic electric refrigerators and domestic washing machines in November than in any other month. The month's output of refrigerators reached a total of 14,264 as compared with 12,736 in October and 8,897 in November, 1947, while the production of washing machines rose to 30,752 from 28,958 in October and 22,239 in the same month of 1947.

Production of both these home appliances has been consistently higher throughout the year. These advances are reflected in cumulative totals for the 11 months to the end of November. In this period, 292,075 domestic washing machines and 126,736 domestic electric refrigerators were turned out, the former comparing with 195,966 and the latter with 88,085 in 1947.

Imports of domestic washing machines and all kinds of refrigerators -- domestic, store and other -- were sharply lower in 1948. Exports of electric refrigerators showed marked expansion, while the exports of washing machines moved lower. During the 11-month period, 1,537 domestic washing machines were imported compared with 64,732 in the same period of 1947, while 12,438 were exported compared with 15,151. Imports of refrigerators of all kinds fell from 53,012 in 1947 to 1,956, while the exports, mainly electric, rose from 5,220 to 15,127.

COAL PRODUCTION UP  
SHARPLY IN 1948

Canadian production of coal rose sharply in 1948 to reach the highest annual total in the past six years. The increase over 1947 was 15.8 per cent, due largely to advances in Nova Scotia and New Brunswick. Imports were up moderately over 1947.

According to preliminary figures, output for the year amounted to 18,377,000 tons as compared with 15,869,000 in 1947, and 18,865,000 in 1942, the previous high annual total. Imports in 1948 totalled 31,050,000 tons compared with 30,564,000.

Mines in Nova Scotia turned out 6,430,000 tons of coal during the year, up sharply from the 1947 total of 4,118,000. Alberta's output amounted to 8,074,000 tons compared with 8,070,000, British Columbia and Yukon 1,772,000 (1,764,000), Saskatchewan 1,586,000 (1,571,000), New Brunswick 514,000 (345,000).

SALES OF CLAY PRODUCTS  
SHOW GREAT INCREASE

Producers' sales of products made from Canadian clays in October declined from the all-time monthly high figure registered in the preceding month. The month's value was \$1,735,351 as compared with \$1,773,697 in September and \$1,414,062 in October, 1947. Aggregate for the 10 months ending October was higher than that shown for the full year 1947, amounting to \$14,009,053 as compared with \$11,521,126 in the same period of 1947, and \$13,973,981 for the 12 months of 1947.

Sales of all types of clay products showed substantial increases in October over 1947. The month's sales were as follows, those for October, 1947 being in brackets: building brick, \$973,351 (\$804,802); structural tile, \$223,257 (\$210,092); drain tile, \$104,142 (\$100,770); sewer pipe, \$209,358 (\$148,406); fireclay blocks and shapes, \$26,105 (\$26,052); pottery, \$122,898 (\$53,852); other clay products, \$76,240 (\$70,088).

PRODUCTION OF ASBESTOS IN NOVEMBER

Canadian production of asbestos was maintained at a high level in November. The month's output amounted to 67,400 tons as compared with 65,800 in the preceding month, 65,700 in the corresponding month of 1947, and the record total of 68,400 tons in September, 1948. Cumulative output for the 11 months ending November totalled 655,900 tons as against 604,400 in the similar period of 1947.



SALES OF MANUFACTURED AND  
NATURAL GAS IN NOVEMBER

Sales of manufactured and natural gas by distributing companies were at high levels both in November and in the first 11 months of 1948, according to figures released by the Dominion Bureau of Statistics.

Manufactured gas sold in November amounted to 2,206,038 M cubic feet as compared with 2,194,350 M in November, 1947. During the 11 months ending November, 23,309,600 M cubic feet were sold as against 22,401,230 M in the same period of 1947.

The month's sales of natural gas totalled 3,846,298 M cubic feet compared with 3,701,679 M in November, 1947, while in the cumulative period, sales totalled 38,421,323 M cubic feet as against 35,307,244 M in 1947.

PRODUCTION OF WIRE NAILS,  
STEEL WIRE AND WIRE FENCING

Production of wire nails, which reached an all-time monthly high in October, was lower in November but well in advance of November, 1947, swelling the earlier gains for 1948 over the preceding year. The month's output amounted to 7,312 tons as compared with 7,974 in October and 6,682 in November, 1947. During the first 11 months of 1948, 78,581 tons were produced as against 70,784 in the similar period of 1947. Shipments in the 11 months were above output, amounting to 81,325 tons.

Steel wire output in November amounted to 29,818 tons as compared with 28,064 tons in October and 28,089 in November, 1947, bringing the aggregate for the 11 months to 295,557 tons as against 290,213 in 1947. Plain wire accounted for 226,343 tons of the aggregate, galvanized wire for 57,796, other coated wire for 2,923, and barbed wire for 8,495 tons.

For the third successive month, production of steel wire fencing, which has been below 1947, moved upward in November, amounting to 2,020 tons as compared with 1,710 in October but was below the output of 2,369 tons in November, 1947. Cumulative output for the first 11 months of 1948 totalled 22,026 tons as against 24,141 in the like period of 1947.

PRODUCTION OF CONCRETE BUILDING  
BLOCKS HIGHER IN OCTOBER

Reflecting the high level of demand for building materials, production of concrete building blocks moved up to 3,984,000 in October compared with 3,807,000 in the preceding month and 3,279,000 in October, 1947. Output of concrete brick rose to 2,619,000 from 2,262,000 in September, and 1,844,000 in 1947. Production of drain pipe, sewer pipe, water pipe and culvert tile, which throughout the year was far above 1947 output, declined to 13,000 tons from the September figure of 18,000 tons, but again exceeded the 1947 output of 12,000 tons.

STOCKS OF NON-FERROUS SCRAP  
METAL AT THE END OF NOVEMBER

Stocks of ingot makers' non-ferrous scrap metal at the end of November were down from the first of the month, amounting to 2,285,900 pounds compared with 2,427,600. The amount purchased or received during the month was 3,629,700 pounds, while the total used or sold aggregated 3,771,400. Month-end stocks of secondary non-ferrous ingots were lower than at the beginning of the month, totalling 2,062,400 pounds as against 2,590,100 while production amounted to 3,664,200 pounds. Total used or sold was 4,191,900 pounds.

SLIGHT RISE IN VALUE OF INVENTORIES HELD BY MANUFACTURING INDUSTRIES

Advance information points to a very slight rise in the value of inventories held by Canada's manufacturing industries during November, states the Dominion Bureau of Statistics. Of the main industry groupings, inventories in the consumers' goods industries appear to have decreased in value to a small extent. Inventories in the producers' goods industries have risen, though not as much as in October. Stocks held in the capital goods industries have also increased, reversing a two-month fall in this group.

A breakdown of the larger groupings shows that, in the consumers' goods group, stocks in the food group have risen, due to increases in the sugar refining and slaughtering and meat packing industries. These more than offset the seasonal decline in the dairy industry, where stocks decreased more than in October, but not as much as in November, 1947, and decreases in the biscuit and confectionery, and miscellaneous foods industries. Inventories in the feed and flour industry increased in value slightly, and those in the pulp and paper industry declined. Stocks in the semi-durable and durable consumers' goods industries decreased slightly, the majority of large industries in these categories, including clothing, rubber goods and footwear, textiles, automobiles, and electrical apparatus and supplies, having all decreased to some extent.

In the capital goods group, all industries except aircraft showed increases in inventory value. The largest was in the shipbuilding industry, but this industry is a somewhat special case since inventories include almost the entire value of current production up to the point where major deliveries are made.

The rise in value of inventories in the producers' goods group was also due to increases in the majority of industries included in this category. The iron and steel industry was the only large industry to show a decline, and it appears to be slight.

In the construction goods group, excluding sawmills, inventory values have risen slightly, the largest increases having been registered in the bridge building and structural steel, and paints, pigments and varnishes industries.

CIGARETTES RELEASED HIGHER IN NOVEMBER

Releases of cigarettes for consumption in Canada increased to 1,479,000,000 in November from the preceding month's figure of 1,429,000,000, and 1,366,000,000 in the corresponding month of 1947, according to the Dominion Bureau of Statistics. This brought the cumulative total for the first 11 months of 1948 to 14,492,000,000, an increase of almost five per cent over the similar period of 1947.

Cigar releases in the month, at 20,800,000 were the highest since October, 1947, when 21,200,000 were released. The November figure compares with 17,900,000 in October, 1948 and 19,000,000 a year earlier. Cut tobacco releases in November rose to 2,343,000 pounds from 2,301,000 in October and 2,120,000 a year earlier, while plug tobacco at 217,000 pounds increased from 199,000 in October but fell from the November, 1947 total of 230,000 pounds.

TEACHERS' SALARIES IN EIGHT PROVINCES OF C.M.D.

Annual salary rates for teachers in the publicly-controlled schools of eight provinces of Canada -- Quebec being excepted -- showed an average advance of \$138 between 1946 and 1947, bringing the cumulative average rise since 1939 to \$592, according to the annual report on teachers' salaries and qualifications by the Dominion Bureau of Statistics. Close to 51,700 teachers were included in the 1947 record, of whom 38,600 were women and 13,100 were men.

Salary rated for all publicly-controlled schools in 1947 averaged \$1,446 as compared with \$1,308 in 1946 and \$854 in 1939. Teachers in city schools had the highest annual average salary at \$2,120 as compared with \$1,926 in 1946 and \$1,613 in 1939, while teachers in one-room rural schools had the lowest at \$1,207 compared with \$1,181 in 1946 and \$607 in 1939.

British Columbia had the highest average salary in 1947 for teachers in all publicly-controlled schools at \$2,042, followed by Alberta at \$1,546, and Ontario at \$1,514. Averages for the other five provinces are: Manitoba, \$1,304; Saskatchewan, \$1,265; Nova Scotia, \$1,241; New Brunswick, \$977; and Prince Edward Island, \$816.

The continued shortage of qualified teachers is indicated by the fact that more than 5,000, or one in 10, were teaching on permits or temporary certificates -- that is without the minimum professional qualifications normally demanded. There was a decline, however, in the number of teachers in this category compared with the preceding year.

The figures for 1947 indicate a return to teaching of a further 2,000 men who had left the profession during the war years. This total, added to a similar figure for 1946, brought the number of male teachers to within less than 2,000 of the number of men in 1939.

Rural teachers continued to be a comparatively transient group, the majority moving from one school to another -- or out of teaching altogether -- every two years or less. The average tenure of city teachers by comparison is about 10 years.

BEER PRODUCTION IN NOVEMBER Beer production in November was lower than in the preceding month but was increased over November, 1947, while the output of new spirits was higher than in October but was down from a year earlier. The month's output of beer amounted to 14,840,000 gallons compared with 15,360,000 in October and 13,940,000 in November, 1947. During the 11 months ending November, 167,530,000 gallons were produced compared with 157,610,000 in the same period of 1947.

New spirits produced in November amounted to 1,960,000 gallons compared with 1,650,000 in October and 2,510,000 in November, 1947, while spirits bottled -- including imported liquors -- totalled 970,000 proof gallons compared with 750,000 in October and 850,000 in November, 1947.

Stocks of distilled liquor at the end of November amounted to 68,890,000 proof gallons compared with 68,840,000 at the end of October and 60,860,000 a year earlier.

CARLOADINGS ON CANADIAN RAILWAYS Carloadings on Canadian railways for the week ended January 8, 1949, totalled 67,547 as against 74,300 cars in the week of January 10th, 1948, a decline of 6,753 cars or 9.1 per cent. The eastern division had 4,375 fewer carloadings while in the west the decline was 2,378 cars.

STOCKS OF CANNED FRUITS AND  
VEGETABLES AT OCTOBER 1

Stocks of canned fruits and vegetables held by packers, canners, wholesale dealers and chain store warehouses on October 1 were substantially higher than a year earlier.

Stocks of canned fruits rose from 2,513,000 dozen containers a year ago to 3,574,000, while the stocks of canned vegetables increased from 12,727,000 dozen to 19,459,000.

CANNED PEAR PACK  
SMALLER IN 1948

Total Canadian pack of canned pears in 1948 was sharply lower than in 1947, amounting to 736,827 as compared with 1,380,075 dozen cans. Packs of Bartlett and of Koiffor and other dessert varieties were both down. Quantity of the latter fell to 522,863 as against 892,248 dozen cans, and the Bartlett pack to 214,024 compared with 487,827 dozen.

REPORTS ISSUED DURING THE WEEK

1. Stocks of Canned Fruits and Vegetables on Hand, October 1 (25 cents).
2. Volume of Highway Traffic Entering Canada on Traveller's Vehicle Permits, December (10 cents).
3. Railway Revenue Freight Loadings, December (10 cents).
4. Carloadings on Canadian Railways - Weekly (10 cents).
5. Vegetable Oil Industry, 1947 (10 cents).
6. Cold Storage Holdings of Fish, January 1 (10 cents).
7. Retail Food Chains, 1947 (25 cents).
8. Statistics of Criminal and Other Offences, 1947 (50 cents).
9. Monthly Estimates of Canadian Labour Income, October (10 cents).
10. Telegraph and Cable Statistics, 1947 (10 cents).
11. Ingot Makers' Monthly Report on Non-Ferrous Scrap Metal and Secondary Non-Ferrous Ingot, November (10 cents).
12. Sales of Manufactured and Natural Gas, November (10 cents).
13. Teachers' Salaries and Qualifications in Eight Provinces, 1947 (25 cents).
14. Sales of Paints, Varnishes and Lacquers, November (10 cents).
15. Preliminary Report on Coal Production, December (10 cents).
16. Products Made from Canadian Clays, October (10 cents).
17. Farm Holdings Cross-Classified by Size, Tenure, Type, and Value of Products, Alberta, 1946 (10 cents).
18. Central Electric Stations, November (10 cents).
19. Transit Report, September (10 cents).
20. Civil Aviation, September (10 cents).
21. Trade of Canada: Exports of Canadian and Foreign Produce, November (25 cents).
22. Canadian Grain Statistics - Weekly (10 cents).
23. Stocks of Fruits and Vegetables, January 1 (10 cents).
24. Summary of Imports for Consumption, November (10 cents).
25. Monthly Summary of Foreign Trade, November (10 cents).
26. Statistics of Average Hours Worked and Average Hourly Earnings at Beginning of November (10 cents).
27. Domestic Washing Machines, November (10 cents).
28. Domestic Type Electric Refrigerators, November (10 cents).
29. Nails, Tacks and Staples, November (10 cents).
30. Steel Wire, November (10 cents).
31. Wire Fencing, November (10 cents).
32. Asbestos, November (10 cents).
33. Concrete Building Blocks and Cement Pipe, September (10 cents).
34. Concrete Building Blocks and Cement Pipe, October (10 cents).
35. Earnings of Wage-Earners by Age and Weeks of Employment, Prairie Provinces 1946 (10 cents).
36. Gross Farm Revenues, Saskatchewan, 1945 (10 cents).
37. Inventories and Shipments by Manufacturing Industries, November (25 cents).
38. Pack of Pears, 1948 (10 cents).
39. Manufacturing Industries of Quebec, 1946 (25 cents).

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