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--- HIGHLIGHTS OF THIS ISSUE ---

AVERAGE WEEKLY WAGES OF HOURLY-RATED WAGE-EARNERS employed by leading Canadian manufacturing establishments at June 1 stood at \$40.43 as compared with \$41.91 at the beginning of May, the decrease being due to shorter hours, resulting in the main from the observance of holidays.

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NUMBER OF FOREIGN VEHICLES ENTERING CANADA on traveller's vehicle permits was 11 per cent greater in July than in the same month last year.

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GENERALLY EXCELLENT PROGRESS IN HARVESTING has been made throughout the greater part of the Prairie Provinces during the past two weeks.

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STOCKS OF CANADIAN WHEAT in store or in transit in North America at midnight on August 11 amounted to 52,892,700 bushels compared with 35,778,000 a year ago.

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STOCKS OF CREAMERY BUTTER in nine cities of Canada on August 19 rose to 47,932,000 pounds from last year's corresponding total of 30,790,000 pounds.

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DEPARTMENT STORE SALES DECLINED EIGHT PER CENT during the week ending August 13 as compared with the corresponding week last year.

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OUTPUT OF 10 OF 16 OF CANADA'S LEADING MINERALS was higher in May than in the corresponding month last year, while in the first five months, production was advanced in all but four items.

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SHIPMENTS OF ASBESTOS FROM CANADIAN MINES during June declined sharply both in the month and in the first six months of this year, the decrease in both periods being due to the labour dispute.

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CARLOADINGS ON CANADIAN RAILWAYS for the week ending August 13 totalled 74,192 cars compared with 69,048 cars in the preceding week and 75,971 cars in the 32nd week of last year, a decline of 1,779 cars or 2.3 per cent.

CROP CONDITIONS IN CANADA

Generally excellent progress in harvesting has been made throughout the greater part of the Prairie Provinces during the past two weeks. While scattered showers have caused some delay, harvesting operations are now general except in northern Alberta. Above-normal temperatures during the past week in all three provinces have hastened maturity of grains but only moderate damage is reported from premature ripening.

Excellent progress in harvesting has been made in Manitoba with continued hot weather and only scattered showers. In the southern sections of the province cutting is nearly completed and one-third to one-half of the crops has been threshed. Over the remainder of the province cutting is well advanced and threshing is under way. Continued hot weather has hastened maturity causing reduction in grade and yield particularly of late coarse grains. The wheat sample is reported as mostly No. 1 to No. 3 Northern. Recent rains have been beneficial to peas, corn, sunflowers and beets which are promising crops. Pastures also have shown some improvement. A good start has been made in cultivation of harvested fields.

Continued hot weather in Saskatchewan has hastened ripening and considerable progress has been made with harvesting operations in all districts. About 40 per cent of the wheat and 35 per cent of the coarse grains are now cut or swathed and threshing is about 15 per cent completed. Yield outturns thus far are substantiating the recent production estimates. Head clipping by grasshoppers and considerable sawfly infestation are reported from central and western districts but swathing grain early has reduced loss.

Over most of Alberta harvesting is under way, and with continued favourable weather will become general within the week. Over much of central Alberta second growth will prolong the harvesting of grain although crops are reported to be ripening fast. In the south-western and Peace River areas, crops are fair to good and harvesting is progressing satisfactorily. Elsewhere in the province crops are reported as poor to fair. Considerable hail damage has occurred in central and northern Alberta with the heaviest damage being reported around Daysland. Light to severe frost occurred over a large area of central and southern Alberta but the extent of the damage has not yet been determined. The latest adult grasshopper survey indicates no increase in numbers or infested area. Around Vulcan severe sawfly infestation has been reported but ideal harvest conditions have helped to hold actual loss to a minimum.

Harvesting of spring grains is practically completed in the greater part of southern Ontario. While yields are somewhat below normal they are generally much above earlier indications. After-harvest cultivation is general and, if moisture conditions improve, the acreage to be seeded to fall wheat should equal or exceed that sown last year. Prospects for late-sown crops continue to be generally satisfactory. Prolonged dry weather has seriously affected the feed situation in many parts of Ontario and supplementary feeding of live stock has been necessitated by lack of adequate pasture. Prospects for an excellent corn crop, however, will do much to improve the feed situation on most dairy farms. Harvesting of spring grains is now general in northern Ontario, with variable yields reported.

During the past two weeks drought conditions have prevailed throughout most of Quebec and crops have deteriorated considerably. Unless ample rains come soon the final yields of the crops to be harvested will be disappointing. Pastures and aftermath have dried up and farmers in many districts have been compelled to feed their cows large quantities of green fodder. Despite the provision of those supplementary feeds, dairy production has declined. A much-below-normal hay crop has been cut and most of it stored. The harvesting of other crops is at its peak and yields are expected to be considerably below normal except in the counties of Quebec, Temiscamingue and Saguenay where outturns are expected to be approximately average. Garden crops too are suffering from dry weather and truck gardeners in the Montreal district report that the outlook for vegetables is less promising than it was a year ago.

Rains on August 19 relieved the drought in the Annapolis Valley of Nova Scotia and already all crops are beginning to improve. Good crops of apples, plums and peaches are expected. In New Brunswick the potato, grain and apple crops in the upper Saint John Valley are very promising. Oat yields in this district are the best in years but in the southern and eastern areas grains and pastures are generally poor.

In British Columbia showery, overcast weather has delayed harvesting of cereal crops. Cutting of grains is in progress in southern districts but elsewhere little harvesting has been done. The fruit crops in most areas are promising and good yields of hops and tobacco are anticipated. Harvesting of the dry pea crop has been delayed by unsatisfactory weather. (1)

STOCKS AND MARKETINGS OF WHEAT AND COARSE GRAINS Stocks of Canadian wheat in store or in transit in North America at midnight on August 11 amounted to 52,892,700 bushels compared with 55,259,600 on August 4 and 35,778,200 on the corresponding date last year, according to the Dominion Bureau of Statistics.

Farmers in the Prairie Provinces marketed 2,695,200 bushels of wheat during the week ending August 11 as compared with 1,397,000 in the corresponding week last year, bringing the cumulative total for the crop year to date to 4,036,300 bushels against 2,443,800 in the like period of the preceding crop year.

The following quantities of coarse grains were also delivered from farms in the Prairie Provinces during the week ending August 11, totals for the same date last year being in brackets: oats, 1,008,800 (200,200) bushels; barley, 980,900 (310,100); rye, 369,500 (936,300); flaxseed, 5,700 (11,600).

Overseas export clearances of wheat during the week ending August 11 totalled 3,232,700 bushels compared with 1,955,300 in the same week last year, and in the cumulative period, 5,310,300 bushels compared with 3,029,700. (2)

DOMESTIC DISAPPEARANCE OF BUTTER LOWER IN JUNE AND HALF YEAR The domestic disappearance of butter in Canada in June amounted to 27,500,000 pounds, a decline of 3,500,000 or 11.3 per cent from the same month last year, according to the Dominion Bureau of Statistics. On a per capita basis the disappearance amounted to 2.11 pounds as against 2.41 pounds a year ago. The use of butter substitute explains the decline in the butter disappearance figure during the first half of this year. (3)

STOCKS OF CREAMERY BUTTER
IN NINE CITIES OF CANADA.

Stocks of creamery butter in nine cities of Canada on August 19 rose to 47,932,000 pounds from last year's corresponding total of 30,790,000 pounds, according to the Dominion Bureau of Statistics. Increased holdings were recorded for six of the nine cities, decreases being shown in Quebec, Calgary and Vancouver.

Stocks were as follows by cities on August 19, totals for the same date last year being in brackets (thousands omitted): Quebec, 3,237 (3,975) pounds; Montreal, 18,125 (11,197); Toronto, 9,962 (3,998); Winnipeg, 10,018 (5,452); Regina, 951 (364); Saskatoon, 375 (301); Edmonton, 2,879 (1,737); Calgary, 1,246 (1,546); Vancouver, 1,139 (2,220).

PRODUCTION OF EGGS IN JULY

Production of eggs in Canada in July amounted to 28,473,000 dozen as compared with 30,428,000 in the same month last year. Of this year's July total, 26,058,000 dozen or 91.5 per cent were produced on farms, and 2,415,000 dozen or 8.5 per cent elsewhere than on farms.

Cumulative output for the first seven months of this year totalled 236,357,000 dozen as against 258,689,000 in the similar period of 1948. Eggs per 100 layers were 1,328 compared with 1,391 in July last year.

In July, sales of market eggs amounted to 22,645,400 dozen valued at \$10,839,500, while producers used 5,950,000 dozen, the estimated value being \$2,763,000. (4)

MIN-HOURS AND HOURLY EARNINGS

Average weekly wages of hourly-rated wage-earners employed by leading Canadian manufacturing establishments at June 1 stood at \$40.43 as compared with \$41.91 at the beginning of May, the decrease being due to shorter hours, resulting in the main from the observance of holidays. In the heavy manufactured goods class, the weekly wage figure was \$43.77 as compared with \$45.35 a month earlier, while in the non-durable goods division the average was \$37.15 compared with \$38.37.

The average hourly earnings reported by the larger manufacturing establishments at June 1 reached a new maximum figure of 99.1 cents, a gain of half a cent over the figure recorded for the week of May 1. Wage-earners in the durable goods group received an average of 106.5 cents per hour as compared with 106.2 a month earlier. In the light manufactured goods division, the hourly earnings rose by four-fifths of a cent to a new maximum of 91.5 cents.

There was a decline of 1.7 hours in the average time worked by wage-earners for whom leading manufacturers kept record of hours worked during the week of June 1 as compared with the same pay period at the beginning of May, largely due to the observance of holidays. The working week was shorter in all major divisions, with the exception of animal food processing and pulp and paper mills. (5)

DEPARTMENT STORE SALES
DOWN EIGHT PER CENT

Department store sales declined eight per cent during the week ending August 13 as compared with the corresponding week last year, according to preliminary figures issued by the Dominion Bureau of Statistics. All regions of the country participated in the decrease except Saskatchewan up one per cent, and Alberta which was unchanged. Ontario showed a drop of 13 per cent, followed by Manitoba down nine per cent, Quebec seven per cent, and the Maritimes four per cent. Figures for British Columbia are not available.

FOREIGN VEHICLE ENTRIES
UP 11 PER CENT IN JULY

The number of foreign vehicles entering Canada on traveller's vehicle permits -- excluding points of entry into Newfoundland -- was 11 per cent greater in July than in the same month last year. The greatest proportionate gain was shown in the Western Provinces and the Maritimes where traffic showed gains of 25 and 20 per cent, respectively. Entries during the first seven months of this year were 13 per cent heavier than in the similar period last year. Increased entries were shown in all provinces except Nova Scotia and Yukon Territory both in the month and cumulative period.

According to the Dominion Bureau of Statistics, the number of entries in July totalled 453,200 as compared with 407,900 in the same month a year ago. During the seven-month period, 1,026,300 vehicles entered Canada as against 911,800 in the like period of 1948.

Entries in the month were as follows by provinces, totals for July last year being in brackets: Nova Scotia, 676 (699); New Brunswick, 26,595 (21,924); Quebec, 76,193 (71,391); Ontario, 285,494 (262,791); Manitoba, 7,089 (5,126); Saskatchewan, 3,270 (2,815); Alberta, 10,977 (8,248); British Columbia, 42,593 (34,516); Yukon Territory, 360 (374). (Nom. 1)

SECURITY PRICE INDEXES

August 18, 1949 August 11, 1949 July 21, 1949

(1935-39=100)

Investors' Price Index

(106 Common Stocks)	109.3	108.9	104.3
82 Industrials	102.2	102.1	97.6
16 Utilities	121.4	120.1	114.6
8 Banks	133.6	133.2	130.1

Mining Stock Price Index

(30 Stocks)	90.2	89.5	84.4
25 Golds	76.4	74.2	70.1
5 Base Metals	116.2	119.1	112.1

PRODUCTION OF SAWN LUMBER
ADVANCED 25 PER CENT IN MAY

Production of sawn lumber east of the Rockies in May is estimated by the Dominion Bureau of Statistics at 177,493,000 feet board measure, up 25 per cent over the 142,205,000 feet produced in May last year. During the first five months of this year, output advanced 14 per cent, amounting to 580,065,000 feet board measure as against 508,118,000 in the similar period of 1948. All regions of the country participated in the rise except Saskatchewan and Alberta both in the month and cumulative period.

Output for May was as follows by provinces, totals for the same month last year being in brackets: Prince Edward Island, 466,000 (163,000) feet board measure; Nova Scotia, 16,101,000 (12,872,000); New Brunswick, 21,256,000 (11,571,000); Quebec, 71,613,000 (57,528,000); Ontario, 60,547,000 (53,634,000); Manitoba, 2,759,000 (514,000); Saskatchewan, 1,833,000 (2,220,000); Alberta, 2,918,000 (3,703,000). (6)

PRODUCTION OF LEADING MINERALS IN MAY Output of 10 of 16 of Canada's leading minerals in May was higher than in the corresponding month last year, while in the first five months of this year, production was advanced in all but four items. In the month, declines were shown in asbestos, coal, gypsum, lime, nickel, and salt; in the five-month period, decreases occurred in asbestos, lead, lime, and salt.

Output for May was as follows, totals for May last year being in brackets: asbestos, 22,700 (60,700) tons; cement, 1,471,000 (1,414,000) barrels; clay products, \$1,494,100 (\$1,383,400); coal, 1,339,800 (1,362,400) tons; copper, 43,306,300 (41,488,100) pounds; gold, 332,400 (288,400) fine ounces; gypsum, 265,500 (275,200) tons; iron ore, 261,400 (162,200).

Lead production in May totalled 35,648,100 pounds (25,489,200 pounds in May, 1948); lime, 88,300 (88,500) tons; natural gas, 4,036,900 (3,920,000) M cubic feet; nickel, 22,321,500 (22,820,200) pounds; petroleum, 1,717,900 (917,400) barrels; salt, 60,400 (61,800) tons; silver, 1,355,100 (1,072,700) fine ounces; zinc, 49,625,500 (40,963,800) pounds. (7)

COPPER AND NICKEL PRODUCTION Canadian production of new primary copper amounted to 20,300 tons in June as compared with 21,700 in the preceding month and 20,400 in the same month last year. During the first six months of this year, 128,700 tons were produced as against 122,200 in the similar period of 1948, an increase of five per cent.

Nickel output in June declined to 10,600 tons from 11,200 in May, but was higher than the 10,400 produced a year ago. Cumulative output for the half year rose slightly to 67,000 tons as against 66,200 in the like 1948 period, an advance of one per cent. (8)

ASBESTOS SHIPMENTS DOWN SHARPLY IN JUNE Shipments of asbestos from Canadian mines during June declined sharply both in the month and in the first six months of this year, the decrease in both periods being due to the labour dispute. According to the Dominion Bureau of Statistics, the month's shipments amounted to 29,200 tons as compared with 54,000 in the same month last year. In the cumulative period, 154,700 tons were shipped as against 335,500 in the similar period of 1948.

Exports in May, the latest available, totalled 19,500 tons compared with 60,500 in the like 1948 period, and in the five-month period, 122,700 tons compared with 269,800 last year. (9)

PRODUCTION AND SALE OF RIGID INSULATING BOARD Production and domestic sales of rigid insulating board were both lower in July as compared with June and July last year. During the first seven months of this year, output and sales recorded gains over 1948.

Production in July amounted to 12,199,900 square feet as compared with 21,095,500 in the preceding month and 19,057,000 a year ago. In the cumulative period, 139,126,700 square feet were produced as against 123,393,500 in the similar period of 1948.

Domestic sales in July totalled 13,609,100 square feet compared with 20,162,000 in June and 14,624,000 a year earlier, bringing sales for the seven-month period to 135,100,700 square feet against 102,640,100 in the like 1948 period. (Mem. 2)

PRODUCTION OF COKE
HIGHER IN JUNE

Canadian production of coke from ovens and gas retorts in June amounted to 327,000 tons as compared with 348,000 in the preceding month and 321,000 in the corresponding month last year, according to the Dominion Bureau of Statistics. Output for the first six months of this year rose to 2,029,000 tons as against 1,912,000 in the similar period last year. All producing areas shared in the rise both in the month and cumulative period.

Producers' stocks of oven and retort coke, excluding breeze at the end of June, amounted to 204,300 tons, of which 61,800 tons were located in the eastern provinces, 138,000 tons in Ontario, and 4,600 tons in the western provinces. Stocks of breeze totalled 111,200 tons, the eastern provinces accounting for 19,200 tons, Ontario 87,800 tons, and the western provinces 4,200 tons.

Imports of coke during the month amounted to 69,800 tons compared with 56,500 a year earlier, bringing imports for the cumulative period to 230,400 tons against 280,200 in the like 1948 period. Exports rose in June, amounting to 18,800 tons compared with 5,900 a year ago. In the six-month period, exports advanced sharply to 166,200 tons from 33,700 in the similar period last year. (10)

CONSUMPTION AND PRODUCTION OF RUBBER

Consumption of rubber showed a decline of eight per cent in June, total for the month standing at 13,161,000 pounds as compared with 13,218,000 in the preceding month, according to figures released by the Dominion Bureau of Statistics. Natural rubber consumption rose to 7,191,000 pounds from 7,154,000, reclaim to 2,482,000 pounds from 2,304,000, while synthetic fell to 3,488,000 pounds from 3,760,000.

In terms of end-product use, the consumption of all rubber in the production of tires and tubes, including tire repair materials, decreased by 183,000 pounds, rubber footwear by 119,000 pounds, in wire and cable by 87,000 pounds, while consumption in other products advanced by 333,000 pounds.

Domestic production of synthetic rubber was lower in June, amounting to 9,462,000 pounds as compared with 10,176,000 in May, and reclaim fell to 594,000 pounds from 692,000.

Month-end stocks of natural rubber totalled 13,195,000 pounds compared with 16,782,000 in May, synthetic 8,490,000 pounds compared with 10,651,000, and reclaim 3,273,000 pounds compared with 4,090,000. (11)

PAINT SALES HIGHER IN MAY

Sales of paints, varnishes and lacquers by manufacturers which normally account for all but a small percentage of the all-Canada total amounted in May to \$8,680,100 as compared with \$8,556,800 in the corresponding month last year, according to the Dominion Bureau of Statistics. During the first five months of this year, sales aggregated \$35,109,200 as against \$38,194,900 in the like period of 1948. (12)

PRODUCTION OF SALT IN JUNE

Production of common salt in June amounted to 64,100 tons, down slightly from last year's corresponding total of 66,700 tons, according to the Dominion Bureau of Statistics. This brought the half-year total to 350,200 tons, almost unchanged from last year's figure of 351,600 tons. (13)

CARLOADINGS ON CANADIAN RAILWAYS Carloadings on Canadian railways for the week ending August 13 totalled 74,192 cars compared with 69,048 cars in the preceding week and 75,971 cars in the 32nd week of last year, a decline of 1,779 cars or 2.3 per cent, according to the Dominion Bureau of Statistics. Eastern division volume was off from 51,202 cars to 46,519, while western loadings advanced from 24,769 to 27,673 cars or by 11.7 per cent.

Commodities registering gains over the corresponding week of 1948 included grain, grain products, hay and straw, fresh fruits, dairy products, ores and concentrates, base bullion, logs and cordwood, gasoline and petroleum, canned foods, and l.c.l. merchandise. Declines from 1948 levels were registered in fresh vegetables, live stock, coal, coke, pulpwood, lumber, iron and steel, sugar, autos and trucks, fertilizers, woodpulp and paper and miscellaneous manufactures. (14)

RELEASED 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).

Reports and Bulletins

1. Telegraphic Crop Report, Canada (10 cents).
2. Canadian Grain Statistics - Weekly (10 cents).
3. Dairy Review of Canada, July (25 cents).
4. Poultry Estimates, July (10 cents).
5. Man-Hours and Hourly Earnings, June (25 cents).
6. Production, Shipments and Stocks on Hand of Sawmills East of the Rockies, May (25 cents).
7. Production of Canada's Leading Minerals, May (10 cents).
8. Copper and Nickel Production, June (10 cents).
9. Asbestos, June (10 cents).
10. Coal and Coke Statistics, June (25 cents).
11. Consumption, Production and Inventories of Rubber, June (25 cents).
12. Sales of Paints, Varnishes and Lacquers, May (10 cents).
13. Salt, June (10 cents).
14. Carloadings on Canadian Railways - Weekly (10 cents).
15. Trade of Canada: Exports of Canadian and Foreign Produce, June (25 cents).
16. Products Made from Canadian Clays, May (15 cents).
17. Civil Aviation, 1948 (10 cents).
18. Highway Traffic at Canadian Border Points, June (25 cents).

Memoranda

1. Volume of Highway Traffic Entering Canada on Traveller's Vehicle Permits, July (10 cents).
2. Rigid Insulating Board Industry, July (10 cents).

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