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--- HIGHLIGHTS OF THIS ISSUE ---

TOTAL LABOUR INCOME IN CANADA in June is estimated at \$643,000,000, showing an increase of \$24,000,000 over the preceding month, and \$47,000,000 or eight per cent above June last year.

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AVERAGE WEEKLY WAGES OF HOURLY-RATED WAGE-EARNERS employed by leading manufacturing establishments in Canada at July 1 amounted to \$41.38 as compared with \$40.43 at the beginning of June.

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SALES OF CANADIAN RETAIL MERCHANTS were estimated at \$664,000,000 in July, an increase of five per cent over the total of \$630,000,000 for July last year.

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DOLLAR SALES OF WHOLESALEERS were one per cent higher in July than in the corresponding month last year, but down eight per cent from the June volume.

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CANADIAN FARMERS REALIZED A CASH INCOME of \$1,056,500,000 from the sale of farm products during the first six months of this year, showing an increase of 14.7 per cent over the 1948 cash income of \$921,400,000 for the same period.

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VALUE OF INVENTORIES held by manufacturing industries appears to have risen slightly during July, while noticeable declines in shipments were shown.

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SALES AND PURCHASES OF SECURITIES between Canada and other countries were considerably lower in July, the volume of trade amounting to \$20,900,000 compared with \$79,200,000 in the preceding month and \$34,900,000 in July last year.

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STOCKS OF CANADIAN WHEAT IN STORE or in transit in North America at midnight on September 8 amounted to 106,668,400 bushels compared with 86,418,200 on September 1, and 93,493,300 on the corresponding date last year.

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CARLOADINGS ON CANADIAN RAILWAYS for the Labour Day week of September 10 declined to 73,526 cars from the revised total of 85,027 for the preceding week and 76,929 in the same week last year.

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PRODUCTION OF COAL IN CANADA was 10 per cent lower in August than in the corresponding month last year, but was up one per cent in the first eight months of the year. Imports were down 51 per cent in the month and 25 per cent in the cumulative period.

CANADIAN GRAIN CROPS
NEARLY HARVESTED

Harvesting in Manitoba and Saskatchewan is nearly finished, although wet weather has delayed completion of cutting and threshing in some northern areas, particularly Saskatchewan. The harvest is about completed in southern Alberta, but in central and northern areas of the province cool, wet weather has retarded progress to the extent that threshing will not be finished before early October. Heavy frosts have caused considerable grade and yield loss to coarse grains in this area.

Threshing, other than flax, is about completed in Manitoba. Yields of grains have been lower than anticipated when harvesting began. General heavy rains during the past week will benefit next year's moisture supply and aid fall cultivation. Fall work is completed in the Red River Valley, well advanced in the south-west and a start has been made in other areas.

Harvesting is nearing completion in southern and central districts of Saskatchewan. In the north, rains and inclement weather have frequently delayed harvesting operations but despite these conditions good progress has been made. On a provincial basis only about five per cent of the wheat and coarse grains are still standing, while 15 and 20 per cent, respectively, remain to be threshed. Hail losses in Saskatchewan have been relatively light this year. While killing frosts have been reported from some points, no extensive damage is indicated as yet.

Cool showery weather in Alberta has delayed harvesting considerably in most areas of the province. Except in the south, threshing is not expected to be completed until early next month. Severe frost over a large portion of central and northern Alberta has reduced grade and yields, greatest damage being done to coarse grains. The Alberta Hail Insurance Board reports that hail damage this year was about average for the province as a whole, although districts in central Alberta around Lacombe-Ponoka to Clendonald-Marwayne experienced extensive and damaging storms. Forage crop supplies are sufficient for present needs but no over-supply is anticipated. Shortages of food grains have been indicated throughout wide areas of the province.

General rains during the first part of September have slowed up the last of the grain harvesting in northern Ontario and have delayed the harvesting of dry beans and flue-cured tobacco in the southern part of the province. Improved moisture conditions, however, have greatly benefited pastures and late-maturing fruit and vegetable crops and have contributed to the seeding of what may be a record acreage of fall wheat. Conditions for germination and early growth of this crop have been generally excellent. Fall ploughing and cultivation are well advanced. Some non-seeded hay crops have had to be ploughed because of killing by drought and heat early in the summer. Harvesting of burley and dark tobacco is practically completed and the quality is reported as good. Near-record yields are expected for shelled corn and soy beans but the yield of potatoes will be less than last year.

Rainfall during the last few weeks has improved field crop conditions in Quebec. Meadows and pastures have been revived and dairy production has shown some improvement. Harvesting has been completed in all but the districts around Gaspé, lower St. Lawrence, Abitibi and Saguenay. Yields vary from area to area, with the average for the province estimated to be somewhat below normal. The harvesting of fairly satisfactory truck crops is drawing to a close. Reports from the Three Rivers and Joliette districts indicate a fairly large crop of medium-quality flue-cured tobacco. Potato yields appear to be below normal, while the outturns of sugar beets and fodder corn are good. Some fall ploughing has been started.

Harvesting of grains throughout the Maritime Provinces is now practically completed and yields generally have been good. Potato digging is under way in the three provinces and yields are better than those of a year ago. Early frost killed the vines in New Brunswick but the crop was not affected and growers were able to begin full scale digging. Very little blight is reported in Prince Edward Island and Nova Scotia and in New Brunswick the attack is not severe.

Harvesting of grains is completed in most areas of British Columbia. In the southern interior sections yields of cereals have been good but yields of seed peas in the Creston district will be slightly below average. Potato tubers in the Okanagan and Thompson valleys have been severely affected by flea beetles, except where control measures were undertaken. The apple crop in the Okanagan Valley, the main producing area, is sizing and coloring rapidly and the crop is expected to exceed earlier estimates. (1)

STOCKS AND MARKETINGS OF
WHEAT AND COARSE GRAINS

Stocks of Canadian wheat in store or in transit in North America at midnight on September 8 amounted to 106,668,400 bushels compared with 86,418,200 on September 1 and 93,493,300 on the corresponding date last year.

Farmers in the Prairie Provinces marketed 24,685,000 bushels of wheat during the week ending September 8 as compared with 31,488,500 in the corresponding week last year, bringing the cumulative total for the crop year to date to 77,022,800 bushels against 72,541,900 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 September 8, totals for the same date last year being in brackets: oats, 3,955,900 (3,020,800) bushels; barley, 4,598,100 (3,825,500); rye, 483,900 (1,503,900); flaxseed, 65,100 (575,400).

Overseas export clearances of wheat during the week ending September 8 totalled 2,642,700 bushels compared with 1,469,900 in the same week last year, and in the cumulative period, 19,462,300 bushels compared with 11,227,600. (2)

STOCKS OF CREAMERY BUTTER
IN NINE CITIES OF CANADA

Stocks of creamery butter in nine cities of Canada on September 16 amounted to 52,259,000 pounds as compared with 32,869,000 on the corresponding date last year, according to the Dominion Bureau of Statistics. Increased holdings were recorded for six of the nine centres, exceptions being Quebec, Calgary and Vancouver.

Stocks were as follows by cities, totals for the corresponding date last year being in brackets (thousands omitted): Quebec, 3,986 (4,611) pounds; Montreal, 19,358 (11,674); Toronto, 10,672 (3,850); Winnipeg, 10,438 (5,499); Regina, 1,094 (431); Saskatoon, 354 (272); Edmonton, 3,544 (2,059); Calgary, 1,397 (1,761); Vancouver, 1,416 (2,712).

HALF-YEAR FARM INCOME
ABOVE A \$1,000,000,000

Canadian farmers realized a cash income of \$1,056,500,000 from the sale of farm products during the first six months of this year, according to preliminary estimates released by the Dominion Bureau of Statistics. This was 14.7 per cent over the 1948 cash income of \$921,400,000 for the same period and an increase of 45.9 per cent over the \$724,300,000 received during the first half of 1947.

In addition, supplementary payments amounting to more than \$9,000,000 were paid out, during the first six months of this year under the provisions of the Prairie Farm Assistance Act, to farmers in the drought-stricken areas of the Prairie Provinces. This compares with nearly \$10,000,000 in 1947 and more than \$15,000,000 in 1948.

Among the commodity groups, the greatest gain in cash income in 1949 occurred in grains, seeds and hay. Cash returns from this group at \$345,900,000 were 55 per cent above the 1948 returns, and more than double the figure for 1947. The greatest single contribution to the 1949 grain income, as well as to total cash income, was the \$205,000,000 disbursement by the Canadian Wheat Board. This substantial outlay was, for the most part, in the form of equalization payments made on wheat delivered by western farmers during the period August 1, 1945, to March 31, 1949. Cash income from the sale of each of the five principal grains was higher this year than last.

Cash receipts from the sale of livestock -- largest single source -- at \$347,000,000 were about nine per cent higher than in 1948, the greatest gain occurring in cattle and calves. Prices of these livestock were substantially higher this year than last as a result of the lifting in August, 1948, of Canadian export controls on the shipments of Canadian beef cattle and calves into the United States and the consequent movement into the higher-priced United States market. The prices of hogs during the first six months of this year were higher than for the same period last year but due to a decline in marketings cash income from this source was almost 11 per cent below last year.

Income from the sales of dairy products in the half year totalled \$166,000,000, down more than seven per cent from 1948. The drop was due in large part to reduced prices. A decline in the sales of eggs to the end of June accounts almost entirely for a 10 per cent drop in receipts from this source.

Ontario had the largest cash income from the sale of farm products in the half-year with an aggregate figure of \$295,523,000 as against \$284,723,000. Saskatchewan, third in 1948 and 1947, was in second place with a total of \$220,892,000 against \$165,167,000. Alberta followed at \$207,249,000 compared with \$165,719,000, and Quebec with \$157,475,000 compared with \$151,328,000. Manitoba was next with \$93,089,000 (\$72,943,000 in 1948); British Columbia, \$36,110,000 (\$33,888,000); New Brunswick, \$19,422,000 (\$21,090,000); Nova Scotia, \$17,278,000 (\$15,894,000); and Prince Edward Island, \$9,484,000 (\$10,599,000). (3)

SALES AND PURCHASES OF SECURITIES
BETWEEN CANADA AND OTHER COUNTRIES

Sales and purchases of securities between Canada and other countries were considerably lower in July, the volume of trade amounting to \$20,900,000 as compared with \$79,200,000 in the preceding month and \$34,900,000 in July last year. Sales exceeded purchases by \$900,000 compared with a large purchase balance in June.

Trade in the seven months totalled \$256,800,000 as compared with \$274,300,000 in the like 1948 period, purchases exceeding sales by \$1,000,000 as compared with \$13,900,000 in the same period of 1948.

The low volume of trade in July was accounted for by decreases in sales and purchases with the United States, which resulted in a sales balance of \$800,000. Transactions with the United States in July were almost evenly divided between stocks and bonds, while in June Dominion bonds were the principal type of security traded.

Total trade with the United Kingdom resulted in a fall in purchases, while sales remained unchanged, which brought the volume of trade into balance. There was little change in transactions with other countries, sales exceeding purchases by \$100,000. (4)

MAN-HOURS AND HOURLY EARNINGS

Average weekly wages of hourly-rated wage-earners employed by leading manufacturing establishments in Canada at July 1 amounted to \$41.38 as compared with \$40.43 at the beginning of June when the observance of holidays had affected the situation. In the heavy manufactured goods class the average weekly wage was \$45.20 compared with \$43.77, and in the non-durable goods division the figure was \$37.57 as against \$37.06.

The average hourly earnings fell by one-tenth of a cent from June 1 to July 1 to 99 cents at the latter date. This was the first decline shown since March 1, 1946; the June 1 and July 1 averages, however, were the highest in the record. Wage-earners in the durable goods group earned, on the average, 106.6 cents per hour, as compared with 106.5 a month earlier. In the light manufactured goods division, hourly earnings fell three-tenths of a cent to 91.2 cents.

There was an increase of one hour in the average working time reported in manufacturing as a whole during the week of July 1 as compared with the same pay period at the beginning of June, which had included the Victoria and Ascension Day holidays. The working week was decidedly longer in the lumber and iron and steel products, tobacco processing, beverage manufacturing, and a number of other industries. (5)

ENTRIES OF FOREIGN VEHICLES
UP FIVE PER CENT IN AUGUST

Foreign vehicles entering Canada on traveller's vehicle permits in August totalled 426,700, showing an increase of five per cent over the same month last year. This raised the cumulative total for the first eight months of this year to 1,453,070 from 1,319,870, or by slightly more than 10 per cent. There were increased entries shown for nearly all provinces in August, the Maritimes and Prairie Provinces continuing to show higher percentage gains than the Central Provinces and British Columbia. In the eight-month comparison, the greatest proportionate gain was registered in the Prairie Provinces.

Entries were as follows in the eight-month period, totals for 1948 being in brackets: Nova Scotia, 1,643 (1,760); New Brunswick, 86,624 (72,217); Quebec, 252,362 (229,685); Ontario, 393,853 (828,062); Manitoba, 22,738 (17,441); Saskatchewan, 10,500 (8,518); Alberta, 29,169 (22,646); British Columbia, 154,798 (137,969); Yukon Territory, 1,183 (1,572). (Mem. 1)

CANADIAN LABOUR INCOME IN JUNE Total labour income in Canada in June is estimated at \$643,000,000, showing an increase of \$24,000,000 over the preceding month, and \$47,000,000 or eight per cent above June last year, according to the Dominion Bureau of Statistics. This raised the cumulative total for the first six months of 1949 to \$3,687,000,000 from \$3,356,000,000 in the like period of 1948, the advance being attributable to a larger labour force and higher average earnings.

Increases in salaries and wages and supplementary labour income were recorded for all sectors of the economy in June with the largest advances occurring in manufacturing and agriculture. Seasonal increases in employment in manufacturing, particularly in the non-durable goods lines, contributed greatly to higher labour earnings in this industry. A substantial increase occurred in transportation, communication and storage, chiefly because of greater activity in water transportation. Building construction employment continued on the uptrend, accounting for higher salaries and wages in the construction industry.

Preliminary figures for June showed 141,084 man-working days lost through strikes and lockouts compared with 174,150 in May. The index of employment in nine leading non-agricultural industries advanced from 128.0 on June 1 to 130.5 on July 1. Average weekly earnings for the same industries increased from \$42.29 to \$42.88 over the same period. (6)

WHOLESALE SALES UP ONE PER CENT IN JULY Dollar sales of wholesalers were one per cent higher in July than in the corresponding month last year, but down eight per cent from the June volume, according to the Dominion Bureau of Statistics. Cumulative sales for the first seven months of this year were four per cent in advance of the same period of 1948. The general unadjusted index of sales, on the base, average for 1935-39=100, stood at 285.2 compared with 283.5 for July last year, and 310.6 for June.

Fruit and vegetable wholesalers, with sales 21 per cent higher than in July last year, was the only trade to register a marked advance in sales volume. Hardware sales were up five per cent, drugs four, and automotive equipment three. Tobacco and confectionery wholesalers' sales were two per cent lower, groceries four, footwear 15, clothing 16, and dry goods two per cent.

Only two of the five regions of the country showed increases in sales in July. In the Prairie Provinces, a gain of four per cent was recorded, while sales in Ontario were two per cent higher. A decrease of four per cent was registered in British Columbia, and seven per cent in the Maritimes. Quebec's figures remained practically unchanged. (7)

RETAIL TRADE UP FIVE
PER CENT IN JULY

Bureau of Statistics.

Sales of Canadian retail merchants were estimated at \$664,000,000 in July, an increase of five per cent over the total of \$630,000,000 for July last year, according to the Dominion Bureau of Statistics. The seven months total for this year was \$4,213,000,000 as compared with \$3,936,000,000 in the like period of 1948, a rise of seven per cent.

The advance in July was due in the main to heavy purchases of motor vehicles, sales of motor vehicle dealers showing an overall increase of 44 per cent. Appliance and radio dealers have shown a stronger sales position in recent months with a sales gain of 16 per cent in July. Small increases were reported for other trades, including food, department, lumber and building, restaurant and jewellery trades. The decreases, while more numerous, were of minor proportions in all cases except coal and wood dealers with a decline of 21 per cent.

Almost all trades showed a higher dollar volume of sales in the first seven months of this year, furniture and coal and wood dealers with respective declines of one and nine per cent being the only exceptions. Increases in the seven-month period were uniformly moderate, only the automotive trades showing gains of 10 per cent or more.

All provinces reported retail trade higher in July and also in the first seven months of this year. Manitoba's gain of 15 per cent was the highest in July. Alberta had a gain of nine per cent, while the Maritime Provinces and Ontario fell slightly short of the average gain of five per cent for Canada.

The January-to-July comparisons show more larger gains for the Prairie Provinces than elsewhere in Canada. Increases were 13 per cent in Alberta and 13 per cent in both Manitoba and Saskatchewan. Other provinces reported gains ranging from two per cent in the Maritimes to six per cent in Ontario. (8)

SECURITY PRICE INDEXES

	<u>September 15, 1949</u>	<u>September 8, 1949</u>	<u>August 18, 1949</u>
	(1935-39=100)		
<u>Investors' Price Index</u>			
(106 Common Stocks) ...	110.4	108.9	109.3
82 Industrials	102.6	100.9	102.2
16 Utilities	125.4	124.4	121.4
8 Banks	135.8	134.5	133.6
<u>Mining Stock Price Index</u>			
(30 Stocks)	89.4	90.0	90.2
25 Golds	74.9	75.4	76.4
5 Base Metals	117.3	118.0	116.2

MANUFACTURERS' INVENTORIES
UP SLIGHTLY IN JULY

The value of inventories held by manufacturing industries appears to have risen slightly during July, while noticeable declines in shipments were shown for the great majority of industries -- due in most cases to annual holiday periods. The preliminary index number of inventories stood at 131.6 per cent of the average 1947 value as against 130.5 at the end of June. This is two per cent below the high reached in February, but 5.7 per cent above the level of July, 1948.

Of the main industry groupings, inventory values in the consumer goods industries remained at approximately the same level as in June, and the index, at 127.3, is 5.2 per cent above last year's level. In the capital goods industries, inventory values fell 1.2 points in July to reach 108.3; the index is 20 per cent below the high reached last November and 14 per cent below July, 1948. Values of stocks in the producers' goods industries rose 2.9 points to reach a new high for the group at 146.5 -- 16 per cent above last year's level.

A breakdown of the larger groupings shows that, in the consumers' goods group, inventories of non-durable consumers' goods industries rose by 1.3 points in July. In the semi-durable consumers' goods group, there was a fractional decline in inventory values, with no large changes in any of the industries. Durable consumers' goods industries showed a two-point drop, the largest changes being declines of eight and six points in the automobile and automobile supplies industries, and an increase of 10 points in the heating and cooking apparatus industry.

In the capital goods industries, the transportation equipment industries remained almost unchanged in total, although there was a five-point drop in shipbuilding inventories, and a six-point rise in the aircraft industries. Of the other large industries in the capital goods group, the boilers, tanks and platework industry showed a six-point drop and stocks in the agricultural implements industry fell seasonally by seven points.

In the producers' goods industries, the iron and steel group rose four points, while the non-ferrous metals group remained almost unchanged. The fertilizers industry showed a seasonal increase of 17 points. The other large industries in this group did not show any important changes from June levels. In the construction goods industries, planing mills showed a six-point rise and the cement industry declined seasonally by 23 points. (9)

PRODUCTION AND SHIPMENTS OF
SAWN LUMBER IN BRITISH COLUMBIA

Production of sawn lumber and ties in British Columbia totalled 250,811 M feet in May as compared with 210,821 M in May last year, an increase of 16 per cent. Production of coast mills showed an advance of 7.9 per cent and interior mills up 40.2 per cent.

Shipments in May amounted to 244,791 M feet compared with 230,128 M a year ago, a gain of six per cent, with coast mills registering an increase of 1.6 per cent and interior mills 28.4 per cent higher. Stocks on hand at the end of May totalled 374,435 M feet compared with 254,009 M at the end of May, 1948. Coast mills reported stocks totalling 250,213 M feet, and interior mills showed 124,222 M feet. (10)

PRODUCTION OF SAWN LUMBER
UP 19 PER CENT IN JUNE

Production of sawn lumber east of the Rockies in June is estimated at 244,520,000 feet board measure, up 19 per cent over the 205,913,000 produced in June last year. During the first six months of this year, output advanced 15 per cent, amounting to 824,585,000 feet board measure as against 714,031,000 in the similar period of 1948. All regions of the country participated in the rise in the month, while in the cumulative period, Saskatchewan and Alberta were lower.

Output for June was as follows by provinces, totals for the same month last year being in brackets: Prince Edward Island, 441,000 (282,000) feet board measure; Nova Scotia, 18,639,000 (17,646,000); New Brunswick, 24,598,000 (17,560,000); Quebec, 111,939,000 (89,333,000); Ontario, 77,290,000 (71,367,000); Manitoba, 4,889,000 (4,075,000); Saskatchewan, 733,000 (571,000); Alberta, 5,891,000 (5,077,000). (11)

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 July amounted to 386,400, an increase of 8.5 per cent over last year's corresponding total of 357,600, according to the Dominion Bureau of Statistics. Stocks of calf and kip skins fell from 738,400 a year ago to 758,700, goat and kid skins from 210,700 to 110,600, horse hides from 25,300 to 17,600, and sheep and lamb skins from 42,600 dozen to 28,700.

Production of cattle sole leather in July totalled 1,400,800 pounds as compared with 1,413,100 in the same month last year; cattle upper leather, 2,261,600 square feet compared with 2,202,300; and glove and garment leather, 100,400 square feet compared with 248,400. Production of calf and kip skin upper leather totalled 819,500 square feet compared with 998,500. (Mem. 2)

PRODUCTION AND SALE OF
RIGID INSULATING BOARD

Production and domestic sales of rigid insulating board both were lower in August than in the same month last year, according to figures released by the Dominion Bureau of Statistics. During the first eight months of this year, output and sales recorded gains over 1948.

Production in August amounted to 13,899,100 square feet compared with 19,362,100 in August last year. In the cumulative period, 153,025,800 square feet were produced as against 142,755,600 in the same months last year.

Domestic sales in August totalled 13,601,300 square feet as compared with 15,945,900 a year earlier, bringing sales for the eight months ending August to 148,702,000 square feet against 118,586,000 in the like 1948 period. (Mem. 3)

SALES OF ELECTRIC STORAGE BATTERIES

Sales of electric storage batteries and parts by principal Canadian producers were valued at \$833,253 in July compared with \$741,503 in the same month last year, an increase of 12 per cent. Output for the first seven months of this year was valued at \$8,013,747, an advance of four per cent over last year's figure of \$7,670,267. (12)

PRICES OF EXPORTS AND IMPORTS
MORE THAN DOUBLE PRE-WAR YEARS

Prices of Canadian domestic produce exported and those of commodities imported into Canada for consumption during 1948 were both more than twice as great as the average prices of the years 1935 to 1939, the rise in export prices being slightly more than in import prices, according to a new series of price indexes for commodity exports and imports prepared and recently released by the Dominion Bureau of Statistics. Both export and import prices advanced considerably more than wholesale prices in Canada over the same period.

Based on 1935-39 equals 100, the new indexes indicate that Canada's exports of domestic produce as a whole were 114.5 per cent higher last year than in the base period. Prices of the year's imports for consumption were close behind in rate of gain with a rise of 113.7 per cent. In comparison, the Bureau's index of wholesale prices, which is based on 1926 equals 100, rose from an average of 77.1 for the years 1935-1939 to 153.4 for 1948, an increase of 99 per cent.

From 1939 to 1946 there was a greater rise in export than import prices, according to the indexes, but during the last three years import prices moved up more steeply, export prices showing a lesser rate of advance in 1948 than in 1947 and the increase in import prices slowing only slightly. For 1939 the exports index stood at 96.7 and the imports index at 99.2. In 1946 the former had risen to 171.5 and the latter to 164.1, increases of approximately 63 and 57 per cent, respectively. From the 1946 level the exports index rose nearly 24 points to 195.2 for 1947 and about 19 points more to 214.5 for 1948. At the same time the imports index moved up some 25 points to 189.2 for 1947 and 24.5 points more to 213.7 for 1948.

The new series of export and import price indexes are designed to serve as a means of measuring the effect of price movements on recorded trade values. At the same time they supply a means of measuring changes in the physical volume of trade, thus meeting in large degree the demand for information on trends in the latter.

Applying the indexes to compare the value and volume of trade in 1948 with 1938, a special Bureau release two months ago showed that the rise in physical volume of exports was 1.7 times as against a rise of 3.7 times in value, while in the case of imports physical volume was up 1.8 times as against 3.9 times for value. Stated another way, while exports rose from a recorded value of \$848 million in 1938 to \$3,110 million in 1948, the latter figure in constant 1938 dollars would be \$1,464 million. Similarly, while the recorded value of imports rose from \$678 million to \$2,637 million, the 1948 value in constant 1938 dollars would be \$1,223 million.

Included in the series are indexes for commodity groups and selected individual commodities. These indexes show wide variations in the price movements of both. Among commodities exported, wood products and paper show the greatest price increase over the 1935-39 period, the index for the group standing at 266.5 in 1948 as compared with 224.6 for fibres and textiles, next in rate of increase, 208.8 for agricultural and other primary products, and 203.1 for iron and steel and their products. Non-ferrous metals and their products stood at 189.1, non-metallic minerals at 165.4, and the miscellaneous group at 157.2. Chemicals and fertilizer at 130.2 had the smallest rise.

In the case of imports, the index for fibres and textiles was highest in 1948 at 277.5, next in order being agricultural and other primary products at 254.0 and non-metallic minerals and their products at 221.5, these three being the only groups more than double the 1935-39 level. The index for non-ferrous metals stood at 192.8; wood products and paper, 178.5; iron and steel group, 173; miscellaneous, 169.3; and chemicals and fertilizer, 160.1.

Still wider ranges in price changes, of course, are found in the indexes for individual commodities. For instance, the index for export prices of planks and boards in 1948 was at 362.9, fresh beef and veal at 346.2, pig and refined lead at 491.9, zinc spelter at 375.5, wheat flour at 239.0 and wheat at 203.6, wood pulp at 260.0 and newsprint at 231.7, cheese at 219.7, fish and fish products at 246.1, and automobiles, trucks and parts at 203.2, while farm implements and machinery stood at only 142.7, fertilizer at 149.1, furs and products at 126.3, nickel at 109.8, and aluminum bars, ingots and blooms at 71.6

Among individual commodities imported, the indexes for food items provide the sharpest contrasts in price increases. The index for cocoa beans was up to 586.9 in 1948, while green coffee stood at 297.0 and black India tea at 210.5. Raw sugar for refining was at 279.4, raisins at 183.3 and oranges, mandarines and tangerines at 130.7 (down from 207.3 in 1946). Among textiles and fibres, the index for raw cotton was 274.1, washed or scoured wool 208.7, artificial silk and fabrics 141.7, sisal, istle and tampico fibre 347.2 and unbleached jute fabric 377.2. Indexes for iron and steel and other metal imports show generally smaller advances, tinplate steel sheets standing at 125.5, tin in blocks, pig and bars at 210.7, iron ore at 167.0, farm implements and machinery at 141.8, other machinery and equipment at 188.7, automobiles, trucks and parts at 186.7. Crude petroleum for refining was 227.1, paints and paint materials 194.6, acids, drugs and pharmaceuticals 189.0, fertilizer 149.9, anthracite coal 210.5 and bituminous coal 276.8.

COAL PRODUCTION LOWER IN AUGUST Continuing the downward trend of recent months, production of coal in Canada was 10 per cent lower in August than in the corresponding month last year, but was up one per cent in the first eight months of the year. Imports were down 51 per cent in the month and 25 per cent in the cumulative period.

According to figures released by the Dominion Bureau of Statistics, the all-Canada output in August totalled 1,243,100 tons as compared with 1,383,700 a year earlier. During the eight-month period, 11,430,700 tons were produced as against 11,327,500 in the same months last year. Imports were down to 2,102,600 tons in August compared with 4,370,200 a year ago, bringing total imports for the year to date to 14,492,000 tons against 19,236,800 in the like period of 1948. (13)

CARLOADINGS ON CANADIAN RAILWAYS Carloadings for the Labour Day week of September 10 declined to 73,526 cars from the revised total of 85,027 for the preceding week and 76,929 in the same week last year. Loadings in the western division continued heavier than last year at 28,860 cars compared with 28,565, while in the eastern division the total fell from 48,364 to 44,666 cars. (14)

UNMANUFACTURED TOBACCO STOCKS AND CONSUMPTION IN SECOND QUARTER Stocks of unmanufactured tobacco at the end of June amounted to 155,606,000 pounds, down from 171,201,000 at the end of March, but almost 13 per cent above the 137,828,000 pounds held at June 30 last year, according to the Dominion Bureau of Statistics. (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. Cash Income from the Sale of Farm Products, by Quarters, Canada 1947-49 (10 cents).
4. Sales and Purchases of Securities Between Canada and Other Countries, July (10 cents).
5. Man-Hours and Hourly Earnings, July (25 cents).
6. Estimates of Labour Income, June (10 cents).
7. Wholesale Trade, July (10 cents).
8. Retail Trade, July (10 cents).
9. Monthly Report on Inventories and Shipments by Manufacturing Industries, July (10 cents).
10. Production, Shipments and Stocks on Hand of Sawmills in British Columbia, May (25 cents).
11. Production, Shipments and Stocks on Hand of Sawmills East of the Rockies, June (25 cents).
12. Factory Sales of Electric Storage Batteries, July (10 cents).
13. Preliminary Report on Coal Production, August (10 cents).
14. Carloadings on Canadian Railways - Weekly (10 cents).
15. Quarterly Report on the Stocks and Consumption of Unmanufactured Tobacco, June (25 cents).
16. Women's Factory Clothing Industry, 1947 (25 cents).
17. Consumption, Production and Inventories of Rubber, July (25 cents).
18. Production of Leather Footwear, July (10 cents).
19. Sales of Paints, Varnishes and Lacquers, June (10 cents).
20. Sales of Paints, Varnishes and Lacquers, July (10 cents).
21. Quarterly Bulletin of Agricultural Statistics, April-June (25 cents).
22. Civil Aviation, March (10 cents).
23. Transit Report, May (10 cents).
24. Central Electric Stations, July (10 cents).
25. Railway Revenue Freight Loadings, August (10 cents).
26. Radio Receiving Sets, June (25 cents).
27. Tale and Soapstone Industry, 1948 (15 cents).

Memoranda

1. Volume of Highway Traffic Entering Canada and Traveller's Vehicle Permits, August (10 cents).
 2. Stocks of Hides, Skins and Leather, July (10 cents).
 3. Rigid Insulating Board Industry, August (10 cents).
 4. Preliminary Statistics on Motion Picture Theatres, 1948 (10 cents).
 5. Pack of Raspberries, 1949 (10 cents).
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