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--- HIGHLIGHTS OF THIS ISSUE ---

INDUSTRIAL EMPLOYMENT AND PAYROLLS showed further small increases at December 1, in spite of seasonal contractions in manufacturing, construction and some other classes, to bring both to new high record levels.

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CHEQUES CASHED AGAINST INDIVIDUAL ACCOUNTS during 1948 exceeded all previous years, the aggregate standing at \$80,687,448,000 compared with \$74,498,093,000 in the preceding year, a rise of 8.3 per cent.

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CANADA HAD A SALES BALANCE ON HER INTERNATIONAL SECURITY TRANSACTIONS in November for the first time since July, and only the fourth time in the 24 months to the end of November.

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DOLLAR VOLUME OF WHOLESALE SALES in November was two per cent below the October level, but seven per cent in excess of November, 1947.

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DEPARTMENT STORE SALES increased 14 per cent during the week ending January 15 this year as compared with the corresponding week a year earlier.

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CANADIAN FARMERS RECEIVED AN ESTIMATED RECORD CASH INCOME of \$1,762,814,000 from the sale of farm products during the first nine months of 1948, an increase of 37 per cent over the same period of 1947.

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CANADIAN PRODUCTION OF STEEL INGOTS last year exceeded 3,000,000 tons for the first time in history.

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CANADIAN RAILWAYS EARNED a record total of \$82,839,900 in October, showing an increase of 18.6 per cent over October last year.

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CANADIAN PRODUCTION OF WHEAT FLOUR in 1948 was down slightly more than 20 per cent from the 1947 all-time record total.

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STOCKS OF CANADIAN WHEAT IN STORE or in transit in North America at midnight on January 13 amounted to 166,687,000 bushels, showing a decline of 3,015,000 bushels from the January 6 figure, but up 31,837,000 bushels over last year's corresponding total.

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CATCH AND LANDED VALUE OF THE PRODUCTS OF THE SEA FISHERIES of Canada both showed substantial increases in 1948 over the preceding year.

CHEQUES CASHED AGAINST INDIVIDUAL ACCOUNTS
IN 1948 EXCEEDED ALL PREVIOUS YEARS

Reflecting the high level of economic activity and advances in prices, cheques cashed against individual accounts during 1948 exceeded all previous years. Total for the year was \$80,687,448,000, according to the Dominion Bureau of Statistics, as compared with \$74,498,093,000 in the preceding year, a rise of 8.3 per cent. The country-wide total has shown advances year by year since 1938, the figure for that year amounting to \$30,924,363,000.

A sharp increase of 14.5 per cent was also shown in the amount of cheques cashed in December. The total for the month was \$7,800,091,000 as compared with \$6,811,076,000 a year earlier. All five economic areas, and all but four of the 33 clearing centres showed advances.

All five economic areas shared in the rise in 1948. Total for the Maritimes advanced from \$1,750,655,000 in 1947 to \$1,970,079,000, Quebec from \$22,919,909,000 to \$23,689,833,000, Ontario from \$30,433,876,000 to \$33,381,605,000, Prairie Provinces from \$12,853,736,000 to \$14,602,310,000, and British Columbia from \$6,539,916,000 to \$7,043,620,000.

Among the 33 clearing centres, Ottawa was the only one to record a decline in 1948, clearings for that centre falling 6.2 per cent to \$3,676,302,000. Total for Montreal rose from \$20,611,366,000 in 1947 to \$20,978,799,000, Toronto from \$20,210,585,000 to \$22,655,185,000, Winnipeg, from \$7,381,393,000 to \$8,375,791,000, and Vancouver from \$5,321,162,000 to \$5,765,370,000.

Cheques cashed in other larger centres in 1948 were as follows, totals for 1947 being in brackets, (thousands omitted): Halifax, \$1,049,266 (\$932,830); Saint John, \$567,250 (\$507,373); Quebec, \$2,433,328 (\$2,077,761); Hamilton, \$1,952,145 (\$1,735,130); London, \$1,069,978 (\$1,013,242); Windsor, \$1,308,939 (\$1,131,584); Calgary, \$2,072,826 (\$1,779,370); Edmonton, \$1,568,265 (\$1,313,138); Regina, \$1,333,318 (\$1,286,896); Victoria, \$951,291 (\$929,641).

SALES BALANCE ON INTERNATIONAL
TRADE IN SECURITIES IN NOVEMBER

Canada had a sales balance on her international security transactions in November for the first time since July, and only the fourth time in the 24 months to the end of November, according to the Dominion Bureau of Statistics.

Net sales to all countries in the month amounted to \$1,600,000, with sales at \$21,800,000 and purchases at \$20,200,000. Transactions with all countries in the first 11 months of 1948 resulted in net purchases of \$17,200,000, compared with net purchases of \$13,900,000 in the same period of 1947 and net sales of \$137,400,000 in the first 11 months of 1946.

The sales balance in November was due for the most part to an excess of \$1,500,000 in purchases by the United Kingdom over sales to that country. All other sales balances in the past seven years have resulted from net sales to residents of the United States and other foreign countries. In trade with the United States in the month the purchase balance was \$100,000. With other countries there was a sales balance of \$200,000.

PRICES AND PRICE INDEXES Price movements in Canada during the nine years 1939 to 1947, embracing war and postwar years, will long remain a fertile field for students of prices, states the Dominion Bureau of Statistics in its publication "Prices and Price Indexes, 1944-47" -- the 21st in a series dating from 1918-1922.

During the early part of the period 1939-1947, Canada with many other countries established a highly organized system of controls over prices, wages and industrial production. Virtually complete control lasted about four years.

Wholesale prices and living costs in Canada during the Second World War followed the same general pattern. During the first few weeks of hostilities, there was a sharp upsurge, followed by a period of gradual but accelerating advance. The general wholesale commodity price index moved upward to 83.2 in March, 1940, from an August 1939 low of 72.3. During the German offensive in the spring of 1940, there was a minor reaction and the wholesale index dropped back to 81.7 in June. From that point it began to recover, at first gradually, and later with increasing rapidity as output of war materials gained in volume. This rise in prices led to the establishment of over-all price "ceilings" in December, 1941, when the index stood at 93.5. By that time the cost-of-living index had moved up from 100.8 in August, 1939 to 115.8.

During the next four years, every effort was made to minimize advances in consumer price levels, and they showed very little change. Producers' and other intermediate prices in some instances were less rigidly held, and by July, 1945, general wholesale prices had reached 104.6. The termination of war was followed by a very slight reaction lasting approximately two months, after which a sharp rise began as the systematic removal of price controls proceeded. There was a lull in the third quarter of 1946 but prices moved ahead again unchecked throughout 1947. By December of that year the general wholesale index had reached 143.5. This was well above any level touched since 1920, but still considerably short of the 164.3 peak recorded for May of that year.

In the four years following the imposition of price ceilings increasing upward pressure on consumer price levels was eased to some extent by the use of subsidies. These were applied at varying price levels. In the important case of milk, production was encouraged by special producer payments, while at the same time a subsidy at the retail level reduced consumer prices. The success of efforts to control the retail price level is indicated by the fact that the cost-of-living index for December, 1945, was 120.1, only 4.3 points above the December, 1941 level.

The decontrol phase may be dated for practical purposes from February, 1946. The removal of price controls and the withdrawal of subsidies proceeded gradually during 1946, but by the end of 1947 rent control was the only major phase of the consumer price stabilization programme still in operation. The reaction of prices to decontrol was sharp, as indicated by a 25.9 point rise in the cost-of-living index during 1946 and 1947.

Although the over-all increase in the cost-of-living index between August, 1939 and December, 1947 was 44.8 per cent, advances in indexes for budgetary groups varied widely from this average increase. Comparable figures showing the average price rise recorded for principal budget groups were as follows: foods, 80.0; rent, 15.5; fuel and light, 21.5; clothing, 59.1; homefurnishings and services, 53.5; and miscellaneous items, 18.3.

Taking account not only of the increases shown by these groups, but also of their comparative importance in calculating the rise of 44.8 per cent in the total index, price changes in each budget group made the following contributions to the over-all increase: foods, 24.5; rent, 2.9; fuel and light, 1.3; clothing, 7.1; homefurnishings and services, 4.8; and miscellaneous items, 4.2.

INDUSTRIAL EMPLOYMENT AND
PAYROLLS AGAIN HIGHER

Industrial employment and payrolls showed further small increases at December 1, in spite of seasonal contractions in manufacturing, construction and some other classes, to bring both to new high record levels. Seasonal expansion in trade and logging in Canada as a whole was the main factor contributing to the small increase.

Preliminary figures released by the Dominion Bureau of Statistics show that the movement of employment was moderately upward in six of the provinces, the largest increases being 0.8 per cent in Ontario and 1.5 per cent in Nova Scotia. Curtailment was indicated in Prince Edward Island, Saskatchewan and British Columbia. The most noteworthy decline -- 2.5 per cent -- was in British Columbia, where manufacturing, logging and some other divisions released employees.

The advance index number of employment rose to 204.1, slightly higher than the November 1 figure of 203.6, and 4.5 points or 2.3 per cent above that of December 1, 1947. Salaries and wages reported were 0.4 per cent higher in the week of December 1 than at November 1 and 12.8 per cent above December 1, 1947. Average weekly earnings at December 1 stood at \$42.20 compared with \$42.15 a month earlier, and \$38.28 at December 1, 1947.

In Manufacturing, the advance index number of employment stood at 208.0 at December 1, slightly below the figure of 208.2 at the beginning of November, but up 1.4 per cent over the December 1, 1947, index of 205.1. The disbursements in weekly salaries and wages in these industries continued to increase, the latest index being 0.6 per cent higher than at November 1 and 12.9 per cent above that recorded in the week of December 1, 1947. Further upward revisions in wage and salary rates contributed to the higher figure. The per capita earnings of persons employed by the larger manufacturing establishments stood at \$43.70 as compared with \$43.39 at November 1 and \$39.25 at December 1, 1947.

SEA FISHERIES PRODUCTION IN 1948

Catch and landed value of the products of the sea fisheries of Canada both showed substantial increases in 1948 over the preceding year. The year's catch totalled 1,276,300,000 pounds, showing an increase of 134,000,000 pounds or about 11 per cent as compared with 1947, while the landed value was \$59,900,000, an increase of 32 per cent over the 1947 figure of \$45,261,000.

Among the principal kinds of fish landed during the year, the largest increase was shown by Pacific herring, total for the year rising to 386,614,000 pounds from 256,340,000 in 1947, but Atlantic herring landings fell to 127,941,000 pounds from 137,780,000. Cod landings moved up to 248,129,000 pounds from 233,611,000, haddock to 51,539,000 pounds from 31,558,000, and lobsters to 36,265,000 pounds from 31,884,000.

The salmon catch fell from 164,847,000 pounds in 1947 to 143,224,000, sardines from 101,586,000 pounds to 89,780,000, halibut from 26,037,000 pounds to 21,186,000, and mackerel from 26,263,000 pounds to 25,382,000. Landings of pollock advanced from 20,860,000 pounds to 21,336,000, and hake from 22,427,000 pounds to 26,982,000.

In the year's processing operations, production of fresh chilled and frozen fillets of cod, haddock, flatfish, etc. all were increased. On the Atlantic coast, reports indicate larger quantities of salted groundfish were produced, especially in the wet-salted form. There was, however, a general decrease in canned fish production on the Atlantic coast, affecting all important species except lobster.

On the Pacific coast the most significant development was the diversion of the herring catch from canning to the production of meal and oil with the beginning of the 1948-1949 season. The Pacific canned salmon pack, although substantially below the 1947 figure, represented a somewhat larger proportion of the catch.

GAIN OF SEVEN PER CENT IN
WHOLESALE SALES IN NOVEMBER

Dollar volume of wholesale sales in November was two per cent below the October level, but seven per cent in excess of November, 1947. Cumulative sales for the 11 months ending November were four per cent higher than in the similar period of 1947. The general unadjusted index of sales, on the base 1935-39=100, stood at 316.2 compared with 321.9 for October and 295.0 for November, 1947.

All regions registered increases in dollar volume of sales over November, 1947, Quebec leading with a gain of 10 per cent, followed by British Columbia with a rise of eight per cent, and the Prairie Provinces seven per cent. Wholesalers in Ontario and the Maritime Provinces showed lesser advances of four and one per cent, respectively.

Wholesalers of fruits and vegetables and of groceries registered declines in dollar sales volume from November, 1947. Sales in the fruits and vegetables trade were down two per cent, while grocery wholesalers reported a decrease of four per cent in dollar volume.

All other trades included in the survey showed increases in sales volume in November compared with November, 1947. Dry goods and hardware wholesalers had the greatest percentage gains at 24 and 25 per cent, respectively. Sales of drug wholesalers were up 17 per cent, clothing wholesalers 15 per cent, tobacco and confectionery wholesalers 11 per cent, and footwear wholesalers nine per cent. Wholesale dealers in automotive equipment registered a gain of five per cent over the already high volume of November, 1947.

Total dollar value of stocks in the hands of wholesalers in the nine lines of trade was 11 per cent higher at the end of November than at the same date in 1947. Tobacco and confectionery and grocery wholesalers reported inventories valued 24 per cent and 21 per cent, respectively, above the value at November 30, 1947, while stocks held by hardware wholesalers were up 16 per cent, dry goods eight per cent, automotive equipment six per cent, and drug wholesalers four per cent.

A decline in value of inventories of 11 per cent was recorded by footwear wholesalers, while fruit and vegetable dealers' stocks were down 19 per cent. Clothing wholesalers reported a drop of 23 per cent in value of stocks on hand.

DEPARTMENT STORE SALES
INCREASED 14 PER CENT

Department store sales increased 14 per cent during the week ending January 15 this year as compared with the corresponding week a year earlier, according to preliminary figures issued by the Dominion Bureau of Statistics. The Maritime Provinces led the Dominion in percentage rise with a gain of 25 per cent, followed by Saskatchewan with 21 per cent, Quebec 18 per cent, Manitoba 13 per cent, Ontario 11 per cent, and Alberta nine per cent. Results for British Columbia are not available.

PRODUCTION OF EGGS
LOWER IN 1948

Net production of eggs in Canada in 1948 declined to 383,076,000 dozen from the preceding year's total of 407,376,000 dozen, according to estimates by the Dominion Bureau of Statistics. Net output on farms in 1948 totalled 351,203,000 dozen compared with 373,696,000 in 1947, and elsewhere than on farms, 31,873,000 dozen compared with 33,680,000.

Estimated output in December was 23,914,000 dozen, a decrease of 17 per cent from December 1947, while the average number of layers fell from 37,827,000 birds to 29,208,000. In December there were 22,113,800 dozen eggs sold for consumption valued at \$9,515,900, and 20,208,000 dozen were used on farms. The number sold for hatching during the month was 200,500,000 dozen.

FARM CASH INCOME AT RECORD LEVEL
IN FIRST NINE MONTHS OF 1948

Canadian farmers received an estimated record cash income of \$1,762,814,000 from the sale of farm products during the first nine months of 1948, an increase of more than 37 per cent over the \$1,282,112,000 shown for the same period of 1947, according to the Dominion Bureau of Statistics. With the inclusion of supplementary cash payments made under the provisions of the Prairie Farm Assistance Act of 1946, 1947 and 1948, the Wheat Acreage Reduction Act of 1946 and 1947, and the Prairie Farm Income Act of 1946, amounting to \$15,821,000, their cash receipts aggregated \$1,778,635,000 as against \$1,292,306,000 for the same period of 1947.

The gain can be attributed in large part to a significant increase in the prices paid for farm products and to the substantial sums paid out as grain equalization and adjusting payments by the Canadian Wheat Board and western grain companies. During the first nine months of 1948, the Canadian Wheat Board paid out in the form of equalization and adjusting payments \$153,560,000 on wheat, \$3,762,000 on oats and \$4,684,000 on flaxseed. In addition, western grain companies paid out a total of \$7,625,000 on oats and barley delivered to them by farmers during the period, August 1 to October 21, 1947.

According to the index number of farm prices of agricultural products, the general level of farm product prices during the first nine months of 1948 was approximately 20 per cent higher than for the corresponding period a year earlier. Generally higher prices for grains, together with increased marketings of wheat and flaxseed, have more than offset smaller deliveries of coarse grains to give an increased cash income from this source in 1948.

Total cash income of \$968,496,000 from the sale of livestock and livestock products during the first nine months of 1948 was 36 per cent higher than for the corresponding period of 1947, while the total derived from the sale of field crops was \$765,986,000 as compared with \$550,552,000, a rise of 39 per cent. The sale of dairy products was the top contributor to the 1948 total, followed by wheat and cattle and calves.

Without exception, gains in cash income from the sale of farm products occurred in all provinces. In absolute terms, the largest gain in cash returns was registered in Saskatchewan, while on a percentage basis the greatest increase took place in Manitoba.

Totals follow by provinces, in thousands, with figures for the nine months of 1947 in brackets: Prince Edward Island, \$15,949 (\$11,341); Nova Scotia, \$25,326 (\$21,870); New Brunswick, \$31,409 (\$24,713); Quebec, \$249,027 (\$203,530); Ontario, \$498,398 (\$387,032); Manitoba, \$183,118 (\$117,563); Saskatchewan, \$378,956 (\$255,306); Alberta, \$304,664 (\$200,674); British Columbia, \$68,342 (\$60,083).

STOCKS OF CREAMERY BUTTER
IN NINE CITIES OF CANADA

Stocks of creamery butter in nine cities of Canada on January 21 amounted to 18,741,000 pounds as compared with 19,831,000 on January 14 and 22,005,000 on the corresponding date last year, according to the Dominion Bureau of Statistics. Holdings were as follows by cities on January 21, totals for the same date in 1948 being in brackets (thousands omitted): Quebec City, 2,383 (1,563) pounds; Montreal, 6,719 (8,103); Toronto, 3,104 (2,311); Winnipeg, 1,844 (4,142); Regina, 191 (226); Saskatoon, 184 (122); Edmonton, 937 (1,507); Calgary, 515 (1,004); Vancouver, 2,864 (3,027).

STOCKS AND MARKETINGS OF
WHEAT AND COARSE GRAINS

Stocks of Canadian wheat in store or in transit in North America at midnight on January 13 amounted to 166,687,000 bushels, showing a decline of 3,015,000 bushels from the January 6 figure of 169,702,000, but up 31,837,000 bushels over last year's corresponding total of 134,850,000.

Deliveries of wheat from farms in the Prairie Provinces during the week ending January 13 amounted to 3,191,000 bushels compared with 2,900,000 in the corresponding week last year. Export clearances during the week totalled 4,336,000 bushels as against 2,690,000 a year ago.

The following quantities of coarse grains were also delivered from farms in the Prairie Provinces during the week ending January 13, totals for the same week last year being in brackets: oats, 977,000 (1,233,000) bushels; barley, 914,000 (973,000); rye, 177,000 (41,000); flaxseed, 56,000 (47,000).

WHEAT FLOUR PRODUCTION IN 1948
DOWN 20 PER CENT FROM 1947

Canadian production of wheat flour in the calendar year 1948 was down slightly more than 20 per cent from the 1947 all-time record total. The year's output amounted to 22,386,000 barrels as compared with 28,057,000 in 1947, the amount of wheat ground during the year falling to 101,456,000 bushels from 126,184,000 in 1947. Exports of wheat flour were also down sharply in the year, totalling 12,378,000 barrels as compared with 18,082,000 in 1947.

In December, 1,728,000 barrels of wheat flour were produced, showing a decrease of 10.8 per cent from the November total, but an increase of about five per cent over the December, 1947 total of 1,692,000. Wheat used in the manufacture of flour in December amounted to 7,691,000 bushels as compared with 7,481,000 a year earlier. Mill stocks of wheat at the end of the year amounted to 3,163,000 bushels.

During 1948, mill grindings of oats totalled 20,645,000 bushels, down almost 28 per cent from the 1947 figure of 28,568,000 bushels. Grind of barley amounted to 9,268,000 bushels compared with 8,841,000, corn 1,517,000 bushels compared with 2,014,000, and mixed grains 18,839,000 bushels compared with 22,185,000.

SUGAR OPERATIONS UP
SHARPLY IN 1948

Canada's sugar refineries had an active year in 1948 with increases in all phases of their operations. Marked increases were shown in the sales and manufacture of refined sugar, while the receipts and meltings and sales of raw sugar also were sharply higher.

The amount of refined sugar manufactured during 1948 rose to 1,375,544,000 pounds from 1,095,232,000 in the preceding year, while the sales advanced to 1,299,466,000 pounds from 1,146,682,000. Stocks on hand at the beginning of 1948 amounted to 150,775,000 pounds as compared with 204,108,000 on the same date in 1947.

Receipts of raw sugar moved up sharply during the year, aggregating 1,222,230,000 pounds as compared with 1,011,318,000 in the preceding year, while the advance in meltings and sales was even more marked, the total rising to 1,231,908,000 pounds from 974,734,000. Stocks at the beginning of 1948 amounted to 147,990,000 pounds compared with 111,414,000 at the beginning of 1947.

As a result of the year's operations, Canada's year-end stocks of refined sugar were substantially above those of a year ago, but the holdings of raw sugar were down from a year earlier. The gain in refined stocks was close to 50 per cent or from 150,775,000 pounds to 226,422,000, while the decline in raw sugar was 10 per cent, from 147,990,000 pounds to 138,256,000.

RAILWAY OPERATING REVENUES
AND EXPENSES HIGHER IN OCTOBER

During October last year Canadian railways earned a record \$82,839,900 from operations, an increase of 4.2 per cent over the previous monthly high of \$79,481,743 in September and of 18.6 per cent over the earnings of \$69,820,158 in October a year earlier. Normally, October is the most active month of the railway year in Canada.

Freight revenues increased over October, 1947, by \$12,516,659 or 22 per cent to \$68,587,000, although carloadings only increased fractionally. Passenger account showed a minor decrease, while mail and express revenues advanced, express rising by \$480,084 or nearly 19 per cent to \$3,046,791, a new peak.

Operating expenses also rose during October, climbing from \$58,675,819 a year earlier to \$69,655,066, an increase of \$10,979,247 or almost 19 per cent. All expenditure accounts were heavier, with maintenance up \$4,867,170 to \$28,807,101. Mainly as a result of augmented wage payments, transportation costs rose \$5,883,113 or by 20 per cent.

Net operating revenue showed a gain for the month of \$2,040,495 over the same month of 1947 at \$13,184,834, but increased taxes and hire of equipment charges reduced this total to an operating income of \$9,864,303 compared with \$8,427,989 a year earlier.

SECURITY PRICE INDEXES

January 20, 1949 January 13, 1949 December 23, 1948

(1935-39=100)

Investors' Price Index

(100 Common Stocks)	113.8	114.9	115.0
76 Industrials	108.9	110.0	110.4
16 Utilities	118.8	119.6	119.0
8 Banks	131.7	133.0	131.9

Mining Stock Price Index

(30 Stocks)	88.5	91.1	85.9
25 Golds	68.7	71.0	65.9
5 Base Metals	128.0	131.2	126.1

PETROLEUM SUPPLIES IN OCTOBER

Canadian production of refined petroleum products increased 22 per cent in October over the corresponding month of 1947, advancing to 8,013,000 barrels from 6,579,000. This brought the cumulative total for the 10 months of the year to 67,549,000 barrels compared with 60,606,000 in the like period of 1947, a rise of 11 per cent.

Receipts of crude oil from all sources during the month rose to 8,588,000 barrels from the October, 1947 total of 6,967,000 barrels, raising the aggregate for the 10-month period to 74,327,000 barrels from 64,116,000 in the like period of 1947.

Receipts of domestic crude again rose sharply in October, totalling 1,132,000 barrels compared with 646,000 a year earlier, and in the 10 months to 9,559,000 barrels compared with 5,639,000. Amount of imported crude received in October was 7,456,000 barrels compared with 6,321,000, and in the cumulative period, 64,768,000 barrels compared with 58,478,000.

1948 STEEL INGOT OUTPUT
ABOVE 3,000,000 TONS

For the first time in history, Canadian production of steel ingots last year exceeded 3,000,000 tons. With December output, in spite of the holiday season, well up to the level of the preceding months, the year's total reached 3,089,027 tons, according to the Dominion Bureau of Statistics, showing an increase of 234,495 tons over the 1947 aggregate of 2,854,532 tons.

Last year's record output compares with the previous top figure of 2,958,906 tons in the wartime year 1942. Production amounted to 2,846,736 tons in 1943, advanced slightly to 2,878,407 in 1944, then declined to 2,747,206 in 1945 and still further to 2,253,437 in 1946. During the last two years production has thus risen about 37 per cent. Indicative of the year's gain, the daily average for 1948 increased to 8,440 tons from 7,821 in 1947.

December output of steel ingots amounted to 271,128 tons, slightly higher than the November figure of 267,671 tons and fourth highest of 1948, being exceeded in March, May and October. It compares with 241,065 in December a year earlier. Daily average last December was 8,746 tons as against 7,882 tons for the same month of 1947.

OUTPUT OF COPPER AND NICKEL

Production of new primary copper in November showed a slight decline from the October total but was well in advance of the figure for the corresponding month of 1947. The month's output amounted to 20,329 tons as compared with 20,454 in October and 18,930 in November, 1947. The November total brought the cumulative output for the first 11 months of 1948 to 220,995 tons as against 206,899 in the like period of 1947.

Nickel output in the month was higher in both comparisons, amounting to 12,691 tons compared with 10,270 in October and 9,914 in November a year earlier. Cumulative production for the 11-month period was 118,066 tons against 107,154 in 1947.

PRODUCTION AND DOMESTIC SALES
OF RIGID INSULATING BOARD

Production and domestic sales of rigid insulating board both were at higher levels last year. With December output well above the preceding month, the year's total reached 220,684,241 square feet as compared with the aggregate of 203,091,237 in 1947. Domestic sales in the year also registered a marked gain, increasing from 160,319,897 square feet in 1947 to 189,814,917.

December production of rigid insulating board amounted to 21,098,436 square feet, showing a slight increase over the November figure of 19,104,287, but was moderately higher than the 17,784,369 in December, 1947. December sales in the month were also up, rising to 20,724,276 square feet from the November figure of 16,489,585, while in December, 1947, sales totalled 15,275,570.

LEATHER FOOTWEAR PRODUCTION
INCREASED IN NOVEMBER

Continuing the increase which has been in evidence since July, 1948, production of leather footwear in Canada in November rose to 3,008,883 pairs as compared with 2,905,143 in the preceding month, according to figures released by the Dominion Bureau of Statistics.

Aggregate output for the first 11 months of 1948 was 29,622,796 pairs as against 33,025,672 in the corresponding period of 1947. Of the November production, 687,921 pairs were soled with materials other than leather.

SHIPMENTS OF PRIMARY IRON
AND STEEL IN OCTOBER

Shipments of primary shapes by Canadian steel mills, exclusive of producers' interchange totalled 236,424 net tons in October compared with 220,492 net tons in September. The October total included 7,860 tons of semi-finished shapes, 17,447 tons of structurals, 22,733 tons of plates, 28,379 tons of rails, 4,046 tons of tie plates and track material, 56,201 tons of hot rolled bars, 13,833 tons of pipes and tubes, 24,241 tons of wire rods, 23,070 tons of black sheets, 9,203 tons of galvanized sheets, 9,091 tons of castings, 4,536 tons of miscellaneous hot rolled products, and 15,784 tons of all other products. The amount of producers' interchange was 78,127 tons in October and 73,300 tons in September.

SAWN LUMBER OUTPUT UP
SLIGHTLY IN NOVEMBER

Canadian production of sawn lumber moved up very slightly in November, but in the 11 months to the end of November there was a slight decline. Among the provinces, British Columbia alone maintained a higher rate of output both in the month and cumulative period. Manitoba was the only other province to show a gain in November, while in the 11 months Alberta showed a gain.

According to the Dominion Bureau of Statistics the all-Canada output of sawn lumber in November amounted to 292,192,000 feet board measure as compared with 291,261,000 a year earlier, and in the 11 months ending November, 5,028,822,000 feet as compared with 5,087,671,000.

Output for the cumulative period was as follows by provinces, totals for the same period of 1947 being in brackets (M board feet): Prince Edward Island, 9,104 (12,372); Nova Scotia, 262,519 (335,673); New Brunswick, 215,212 (286,266); Quebec, 1,032,712 (1,124,916); Ontario, 685,679 (712,307); Manitoba, 46,347 (55,661); Saskatchewan, 80,922 (103,237); Alberta, 235,587 (215,376); British Columbia, 2,460,740 (2,241,863).

USE OF ELECTRIC POWER IN MANUFACTURING
AND MINING INDUSTRIES

During the 23 years from 1923 to 1946 there has been a steady increase in total capacity of power equipment in manufacturing and mining industries, and electric motors driven by central station power, which constitute about 70 per cent of the total power capacity, rose by 400 per cent. The capacity of water wheels increased only 29 per cent, the majority of new installations being in central electric stations. Steam engines also showed a relatively small increase compared to the advance in total power and although internal combustion engines increased in capacity by 811 per cent, they still constitute only 6.3 per cent of the total capacity. These include both diesel or compression ignition engines and electric ignition engines.

CARLOADINGS ON CANADIAN RAILWAYS

Cars of revenue freight loaded during the week ended January 15 aggregated 74,940 cars as against 67,547 in the first week of the year and 76,307 cars for the week ending January 17, 1948. The indicated decline from last year was some 1,337 cars or 1.8 per cent. Loadings of grain increased from 7,497 in the second week of 1948 to 8,385 cars but grain products were off 561 cars. Fresh fruit improved from 171 to 371 cars, coal was up 1,494 cars to 7,234 for the week, coke advanced from 461 to 621 cars, ores from 2,095 to 2,513 cars, gasoline and oils from 3,668 to 4,241 cars, manufactured iron and steel from 1,515 to 1,638 cars, while l.c.l. merchandise improved by 275 cars to 17,205. Declines were shown in live stock off 565 cars from the more active demand of 1948, butter, cheese and eggs were down 100 cars to 149. Pulpwood dropped from 7,156 to 4,878 cars and lumber 1,060 cars to 2,808. Autos and trucks moved in reduced volume reporting 760 cars loaded as against 1,061 cars in the similar period of last year.

ONTARIO'S MANUFACTURING
INDUSTRIES IN 1946

With reconversion to peacetime production under way, gross value of production by the manufacturing industries of Ontario during 1946 declined \$210,545,000 from the 1945 value, amounting to \$3,754,524,000 as against \$3,965,069,000, according to the detailed annual report on Ontario manufacturing by the Dominion Bureau of Statistics. Output of many lines of consumer goods rose substantially during the year, but these gains were outweighed by the decrease in activity through cessation of production of war equipment and materials.

Reports were received by the Bureau from 11,424 establishments operating in 1946, an increase from 10,869 in 1945. Number of their employees totalled 498,120, down from 518,056, and salaries and wages paid amounted to \$845,217,000 as against \$882,483,000 in 1945. Peak figure for wartime employment was 570,017 in 1943 and for salaries and wages, \$975,038,000 in 1944.

Between 1944 and 1946 the volume of manufacturing production in Ontario, measured by the number of persons employed, declined nearly 12 per cent. The iron and steel products group showed the greatest decrease with 69,545 less employees. Next were chemicals and allied products with a drop of 9,246, non-ferrous metal products with 8,878, and miscellaneous industries with 4,730. On the other hand, employment rose 13,682 in the wood and paper products group, 4,377 in textiles, 3,334 in vegetable products, 2,970 in animal products, and 1,764 in non-metallic mineral products.

From the standpoint of gross value of production, the iron and its products group continued to lead the groups in 1946 with an output valued at \$879,157,000, which was down sharply from \$1,185,567,000 in 1945. The vegetable products group was also again in second place, up to \$734,686,000 compared with \$685,590,000. The wood and paper products group moved up to third from fourth place in 1945 with an output value of \$527,825,000 compared with \$422,072,000. Next in order were: non-ferrous metal products, \$415,292,000 (\$456,735,000); animal products, \$397,619,000 (\$380,202,000); textiles and textile products, \$330,901,000 (\$299,521,000); non-metallic mineral products, \$204,854,000 (\$193,065,000); chemicals and allied products, \$199,676,000 (\$230,268,000).

Heading the list of individual industries in production value in 1946 was the automobile industry at \$192,040,000. It was followed by electrical apparatus and supplies with \$170,544,000; pulp and paper, \$162,452,000; slaughtering and meat packing, \$154,470,000; flour and feed mills, \$141,779,000; rubber goods, \$130,925,000; non-ferrous smelting and refining, \$119,240,000; primary iron and steel, \$114,304,000. In number of employees, the electrical and supplies industry ranked first, followed by automobiles, rubber, machinery, primary iron and steel, pulp and paper, bread and other bakery products.

OVER 68,000 DWELLINGS
COMPLETED TO END OF NOVEMBER

During November an estimated 9,701 dwelling units were completed in Canada, bringing the estimated total for the 11 months of 1948 to 68,103 units. November completions were the highest for any month in 1948, comparing with the previous high of 8,164 in October.

During the 11 months of 1948, construction was commenced on 86,348 units and at the end of November the number under construction stood at 61,093. In November, 7,795 units were started as compared with 7,437 in October.

The average length of time required to build the dwelling units completed in November was 6.0 months, showing a slight decline from the October estimate of 6.1 months, but a moderate increase over the low of 5.4 months recorded in September. It is estimated from the types of dwelling units being constructed that 25 per cent of these completed in the first 11 months of 1948 are for rental purposes and the remainder will be owner-occupied.

REPORTS ISSUED DURING THE WEEK

1. Carloadings on Canadian Railways - Weekly (10 cents).
2. Housing Bulletin No. 11: January-November, 1948 (10 cents).
3. Operating Revenues, Expenses and Statistics of Railways, October (10 cents).
4. Production of Leather Footwear, November (10 cents).
5. Wholesale Trade, November (10 cents).
- ✓ 6. Manufacturing Industries of Ontario, 1946 (25 cents).
7. Current Trends in Food Distribution, November (10 cents).
8. Canadian Grain Statistics - Weekly (10 cents).
9. Sugar Report, November 27 to December 31, 1948 (10 cents).
10. Preliminary Report on the Pack of Corn, 1948 (10 cents).
11. Monthly Report on Steel Ingots, December (10 cents).
- ✓ 12. Farms Reporting Certain Crops and Classes of Livestock by Census Division, and Size of Farm, Manitoba, 1948 (10 cents).
- ✓ 13. Trade of Canada: Articles Imported from Each Country, Nine Months Ended September, 1948 (25 cents).
- ✓ 14. Trade of Canada: Volume III -- Imports, 1947 (\$2.00).
15. Advance Statement of Employment and Weekly Earnings, December 1 (10 cents).
- ✓ 16. Chemicals and Allied Products in Canada, 1941-1945 (50 cents).
17. Canadian Milling Statistics, December (10 cents).
18. Primary Iron and Steel, October (10 cents).
19. Production, Shipments and Stocks on Hand of Sawmills East of the Rockies, November (25 cents).
20. Canadian Fisheries Statistics, December (10 cents).
21. Prices and Price Indexes, 1944-1947 (25 cents).
22. Copper and Nickel Production, November (10 cents).
- ✓ 23. Sales of Paints, Varnishes and Lacquers, November (10 cents).
- ✓ 24. Crop Reporting Calendar, 1949
25. Use of Electric Power in Manufacturing and Mining Industries, 1946 (25 cents).
26. Rigid Insulating Board Industry, December (10 cents).
27. Retail Chains in Canada, 1947 (25 cents).
28. Sales and Purchases of Securities Between Canada and other Countries, November (10 cents).
29. Cheques Cashed in Clearing Centres, December (10 cents).
30. Cash Income from the Sale of Farm Products in First Nine Months of 1948 (10 cents).
31. Asphalt Roofing Industry, December (10 cents).
32. Refined Petroleum Products, October (20 cents).
33. Monthly Poultry Estimates, December (10 cents).
- ✓ 34. Pack of Tomatoes and Tomato Juice, 1948 (10 cents).
35. Trade of Canada: Imports Entered for Consumption, November, and 11 Months Ended November, 1948 (25 cents).

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

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