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HIGHLIGHTS OF THIS ISSUE

HIGHER RENTS, FOOD PRICES were mainly responsible for increases of 0.2 to 0.6% in the 10 regional consumer price indexes in May... The index of farm prices of agricultural products rose 0.8% as gains in livestock and potato prices overbalanced drops in the prices of dairy products, poultry and eggs. (Page 2)

MANUFACTURING: Production of steel ingots slumped nearly 30% from the 1953 level in May, was off 25% in the first five months this year... Washing machines output was cut by one-quarter in the first four months... Manufacturers' shipments were down 3.5% in value in the first quarter, an increase in consumers' goods being more than offset by declines in producers' goods, capital goods and construction goods. (Page 8)

AVERAGE WEEKLY WAGES were lower in manufacturing, transportation and construction at May 1 than a month earlier, but higher in mining and the service industries. April labour income was 0.8% higher this year, gains in construction, distribution, finance and services outweighing drops in manufacturing and the primary industries. Reduced employment, a shorter average work week and less overtime pay contributed to the decline in manufacturing. (Page 7)

SALES of motor vehicle dealers, department stores, chain shoe stores, chain hardware stores, women's clothing chain stores and variety chain stores were lower this May, but sales were above last year's level in chain grocery and combination stores and chain drug stores. (Pages 3 & 4)

VALUE OF CHEQUES CASHED in clearing centres in May was up 8% from a year earlier, and the total for the first five months of 1954 was up almost 5%. (Page 10)

FOOD STOCKS: July 1 holdings of creamery butter, skim milk powder, ice cream, poultry, eggs and process cheese were higher this year, but stocks of cheddar cheese, evaporated whole milk, frozen cream, margarine and meat were lower than at the start of July last year. (Page 13)

RAILWAY CARLOADINGS were off 5% from last year in the last nine days of June, averaged 10% lower in the first half of 1954... A 13% drop in operating revenues and a 9% cut in operating expenses resulted in a 74% reduction in the operating income of Canada's 16 largest railways this April. (Page 5)

P R I C E S

Consumer Price Indexes For Regional Cities Advances ranging from 0.2 to 0.6% were registered for each of the 10 regional consumer price indexes between May 1 and June 1, due mainly to increases in foods and rents. Food indexes were substantially higher in all cities as general increases were recorded for meats, fresh vegetables, fresh and canned fruits, tea, and coffee. Butter and chicken prices were generally lower. Rents moved up in eight centres and were unchanged in two.

Clothing was lower in five cities and higher in one as a result of small changes affecting a few items, notably nylon hosiery. No over-all movement was recorded in the remaining four cities. Changes in electrical appliance prices were mainly responsible for the movements of the household operation indexes. Decreases for cotton sheets, garbage cans and lawnmowers and increases in laundry, dry-cleaning and shoe repair services were also reported in a number of cities. Group indexes were lower in five cities, higher in two and unchanged in three. Other commodities and services remained at the same level in eight cities, while the St. John's series advanced 0.1% and the Saskatoon-Regina index declined by the same amount.

Total indexes for June 1 and May 1, and June 1 group index detail are shown in the following table. These indexes show changes in retail prices of goods and services in each city. They do not indicate whether it costs more or less to live in one city than another.

Consumer Price Indexes for Regional Cities
(Base 1949 = 100)

	Total Indexes		Group Indexes - June 1, 1954				
	May 1, 1954	June 1, 1954	Food	Shelter	Clothing	Household Operation	Other Commodities and Services
St. John's*	102.2	102.5	100.0	107.3	102.3	104.0	102.7
Halifax	113.6	113.9	105.7	122.9	116.3	119.2	116.2
Saint John	115.8	116.2	109.1	120.8	118.5	116.5	123.0
Montreal	116.3	117.0	114.3	133.1	110.6	115.8	116.8
Ottawa	115.5	116.1	110.8	127.7	113.5	115.8	118.6
Toronto	117.7	118.2	110.9	140.6	111.4	116.4	118.6
Winnipeg	114.8	115.3	111.0	123.4	115.2	113.6	117.4
Saskatoon-Regina	113.5	114.1	110.6	113.9	116.6	118.5	112.9
Edmonton-Calgary	114.4	114.8	110.4	119.4	114.2	115.8	118.2
Vancouver	116.9	117.1	111.6	124.7	113.4	124.3	118.9

* Index on the base June 1951 = 100.

Farm Prices Index Moved Upward In May Due largely to higher prices for live stock and potatoes, which more than offset lower prices for dairy products, poultry and eggs, the Bureau's index number of farm prices of agricultural products for Canada (Newfoundland excluded) rose 1.8 points in May to 232.8 from 231.0 in April. The May advance followed successive declines in March and April from February when the index stood at 233.8.

Eight of the nine provincial indexes also advanced in May from April, the exception being the Quebec index. Provincial indexes, with those for April in brackets, were: Prince Edward Island, 180.2 (177.3); Nova Scotia, 215.8 (214.4); New Brunswick, 206.4 (205.1); Quebec, 265.2 (265.3); Ontario, 254.1 (252.2); Manitoba, 218.6 (216.7); Saskatchewan, 197.1 (196.7); Alberta, 227.5 (223.3); and British Columbia, 256.3 (253.2). (1)

Security Price Indexes

	<u>July 8, 1954</u>	<u>July 2, 1954</u> (1935-39=100)	<u>June 10, 1954</u>
<u>Investors' Price Index</u>			
Total Common Stocks	182.8	179.5	178.7
Industrials	182.2	179.2	178.4
Utilities	169.4	166.5	166.1
Banks	220.1	213.1	211.1
<u>Mining Stock Price Index</u>			
Total Mining Stocks	91.2	91.1	89.6
Golds	63.5	64.0	64.0
Base Metals	154.6	153.2	148.2

M E R C H A N D I S I N G

Sales And Financing Of Sales Of Motor Vehicles Down Again In May Sales of new motor vehicles continued to fall in May when retail dealers across Canada sold 44,007 units, 16.9% below last year's 52,978. The retail value was off 15% to \$113,350,000 from \$133,302,000. This put January-May sales at 189,255 units, down 17% from 227,969 a year ago, and the retail value dropped 14.5% to \$487,664,000 from \$570,337,000. There were decreases in both passenger and commercial vehicle sales, the decline in the latter being most pronounced.

New passenger car sales in May dropped to 35,996 units from 40,783 a year earlier and the retail value was cut to \$92,969,000 from \$103,295,000. In the five months of this year the sales were down to 153,795 units from 177,333, and the retail value was off to \$395,312,000 from \$445,954,000.

Sales of new commercial vehicles were down about one-third both in volume and value in May. The number of units sold was 8,011 as compared with 12,195 and the retail value was \$20,381,000 as compared with \$30,007,000. In the January-May period the unit sales were down to 35,460 from 50,636, and the value was off to \$92,352,000 from \$124,383,000.

Financing of sales of new motor vehicles was also down in May and the five months. In May the sales of 13,973 new passenger cars were financed for a total of \$25,578,000 as compared with 14,978 financed for \$25,878,000 a year ago. In the five-month period 55,360 units were financed for \$99,771,000 as compared with 64,061 units financed for \$108,130,000.

In the new commercial vehicle class the number of units financed in May was reduced to 3,005 units from 4,866 and their financed value declined to \$6,751,000 from \$10,857,000. In the January-May period the number of units declined to 13,035 from 18,979 and the financed value dropped to \$27,939,000 from \$39,591,000.

Financing of sales of used passenger cars in May declined to 35,129 units from 41,172, and the financed value fell to \$29,410,000 from \$35,207,000, bringing five-month financing to 132,684 units involving \$111,678,000 as compared with 163,103 units involving \$138,828,000 a year ago.

In May 5,933 used commercial vehicles were financed for a total of \$5,100,000 as compared with 7,271 units financed for \$6,841,000. In the five-month period this year, 22,970 units were financed for \$20,097,000 as compared with 28,328 units financed for \$26,497,000. (2)

Department Store Sales Declined 3% In Week Department store sales declined 3% during the week ending July 3 as compared with a year earlier. There were sales declines in all provinces except British Columbia where the increase was 11.5%. The drop in the Atlantic Provinces was 1.8%, Quebec 5.1%, Ontario 8.2%, Manitoba 3.1%, Saskatchewan 2.3%, and Alberta 6.4%.

Department Store Sales Were 1% Lower This May Department stores across Canada rang up a total of \$85,168,000 in sales this May, down 1% from last year's May sales of \$86,085,000. May sales were higher this year in the Atlantic provinces and British Columbia, but lower from Quebec to Alberta.

Sales in the Atlantic provinces increased 4% this May to \$7,334,000 from \$7,052,000 last year, and in British Columbia rose almost 9% to \$14,441,000 from \$13,285,000. Largest percentage drop in May sales was in Saskatchewan, where the total fell 8.5% to \$4,588,000 from \$5,014,000. Sales fell almost 7% in Manitoba to \$7,416,000 from \$7,940,000, 4% in Ontario to \$27,599,000 from \$28,780,000, 1% in Alberta to \$8,247,000 from \$8,330,000, and slightly less than 1% in Quebec to \$15,543,000 from \$15,684,000.

Only 10 of the 29 departments listed in the Bureau's monthly report had higher sales this May. There were increases in departments retailing food and kindred products, hardware and housewares, sporting goods and luggage, major appliances, radios and music, men's clothing, stationery, books and magazines, furs, women's and misses' coats and suits, and lingerie and corsets. There were sales declines in departments handling women's and misses' dresses and sportswear, girls' and infants' wear, aprons, housedresses and uniforms, millinery, hosiery and apparel accessories, women's, misses' and children's shoes, men's furnishings, boys' clothing and furnishings, men's and boys' shoes, toiletries, cosmetics and drugs, photographic equipment and supplies, piece goods, linens and domestics, smallwares, china and glassware, home furnishings, furniture and jewellery. April-end stocks were higher this year in 16 of the 29 departments. Largest gain of 21% was in hardware and housewares, while the sharpest drop was 8% in furniture departments. Total value of department store stocks was \$255,254,000, up over 4% from \$244,407,000 at the end of April last year. (3)

Food Chain Store Sales Up 10%, Drug 0.8%, But Others Declined Grocery and combination store sales increased 10% in May as compared with a year earlier and drug chain sales were up a moderate 0.8%. At the same time chain shoe store sales declined 9.7%, hardware 2.1%, women's clothing 0.4%, and variety stores 0.3%.

May 1 stocks held by grocery and combination chains were valued 20.7% higher than a year ago, hardware 25.9% higher, drug stores 9.8%, and shoe stores 3.3%. Women's clothing chain store stocks declined 2.8% in value, and variety store inventories were 0.6% lower.

May sales for the six types of chains, with last year's figures in brackets, were as follows (in thousands): grocery and combination stores, \$74,973 (\$68,153); variety stores, \$15,617 (\$15,668); women's clothing stores, \$4,214 (\$4,231); shoe stores, \$3,682 (\$4,078); drug stores, \$2,833 (\$2,811); and hardware stores, \$1,260 (\$1,287). May 1 inventories follow (in thousands): grocery and combination stores, \$51,389 (\$42,560); variety stores, \$51,044 (\$51,375); shoe stores, \$23,307 (\$22,570); drug stores, \$10,523 (\$9,581); women's clothing stores, \$10,382 (\$10,682); and hardware stores, \$6,870 (\$5,457). (4)

TRANSPORT

Decline In Urban, Interurban Transit Line Passengers Continued This April The decline in transit company passengers continued in April with urban and interurban lines carrying 116,929,492, some 1,834,590 or 1.5% fewer than in the same month last year. Urban passengers numbered 109,994,911 against 111,357,164 a year earlier, and interurban passengers 6,934,581 against 7,406,918. Ontario and Saskatchewan were the only provinces with higher urban traffic this year, while interurban travel increased in New Brunswick, Quebec, Saskatchewan and Alberta.

Combined revenue was \$13,319,681 this April, \$41,743 less than last year, receipts on urban lines dropping to \$10,006,184 from \$10,075,297, but receipts on interurban lines increasing to \$3,313,497 from \$3,286,127. Urban revenues were down in all provinces except Ontario, Saskatchewan and Alberta, and interurban revenues were lower in all except Quebec, Manitoba, Saskatchewan and Alberta. (5)

10% Less Cars Loaded On Railways In First Six Months Of This Year There were 1,745,416 cars loaded on Canadian railways in the first six months of this year, 193,778 or 10% less than in the first half of 1953 and 258,686 or 13% less than in January-June, 1952. Leading decline was a 42% slump in grain shipments, with only 151,169 cars loaded in the first half of 1954 as compared with 259,917 in the first six months of last year.

Iron ore shipments were down to 9,887 cars from 17,099 and logs to 24,689 from 32,523 cars. Lumber shipments were off to 87,734 cars from 97,646, and miscellaneous carloads to 110,771 cars from 119,608. L.C.L. shipments fell to 363,094 cars from 402,937, but coal loadings were up to 120,154 from 112,890.

In the last 9 days of June loadings totalled 104,573 cars, a 5% drop from the 110,367 loaded in the corresponding period of last year. Both eastern and western divisions reported reduced loadings, with the eastern total down 4,351 cars to 66,028 and the western total off 1,443 cars to 38,545. (6)

Railway Freight Movement Down About 4.6% In March Canadian railways carried a total of 11,515,383 tons of revenue freight during March, a decrease of 559,490 tons or about 4.6% from the total of 12,074,873 tons carried in March last year. Proportionately, the decrease was less than recorded for February (6.5%) and January (16%) from the corresponding months of 1953.

Loadings were down in March to 8,700,275 tons from 9,028,784 tons a year earlier. Receipts from foreign connections destined to Canadian points were also lower at 1,397,842 against 1,480,064 tons and intransit freight at 1,417,266 compared to 1,566,025 tons. Loadings were lower than last year in Newfoundland, Prince Edward Island, Ontario, Saskatchewan and British Columbia, and higher in the other five provinces.

Freight carried in Ontario fell to 4,921,886 from 5,672,925 tons, while the total in Quebec rose to 2,118,642 against 2,035,827 tons. Freight carried in Alberta climbed to 914,302 from 751,538 tons, while the Saskatchewan total was off to 703,852 from 813,664 tons. Other increases and decreases were smaller. (7)

Railway Operating Income Was 74% Lower This April A 13% drop in operating revenues and a 9% cut in operating expenses left Canada's 16 largest railways with an operating income of \$1,573,267 this April, \$4,513,469 or 74% less than in the same month last year. Revenues fell to \$88,492,676 from \$101,728,379 and expenses to \$83,113,618 from \$91,350,815.

The cut in April income was felt by both C.N.R. and the C.P.R., but the drop was more pronounced in the former. This year the C.N.R. reported an operating loss of \$776,733 for April as compared with a credit balance of \$2,851,460 a year earlier. April operating income of the C.P.R. was \$2,011,790 this April, \$84,278 less than last year.

The 16 railways reported freight revenues of \$70,713,409 this April as against \$82,-925,668 last year. Passenger receipts were off to \$6,399,034 from \$6,514,905, express revenues to \$4,285,803 from \$4,661,827 and water line revenues to \$156,155 from \$408,703. Mail revenues were up to \$1,227,461 from \$1,080,795, and other passenger train revenues to \$931,441 from \$920,087, but all other revenues totalled only \$4,779,373 as against \$5,216,394. Traffic and general expenses were higher this April but all other expenses were lower.

Revenue tons carried were off 14% to 11,589,655 tons from 13,441,084 last year, and revenue ton miles fell 15% to 4,362,020,000 ton miles from 5,133,942,000. Passengers numbered 2,280,141, some 18,461 less than a year earlier, and passenger miles dropped slightly more than 1% to 222,006,000 from 224,782,000. Freight train miles were 17% lower this April at 5,873,561 against 7,104,923, and passenger train miles were down 3% to 3,724,273 from 3,844,686. (8)

T R A V E L

2% Fewer Entered Canada By Rail, Bus, Boat And Plane During April During April 175,100 persons entered Canada from the United States by rail, bus, boat and plane, 3,700 or 2% less than in the same month last year. Foreign travellers numbered 61,300, up less than 1% from 60,800 last year, while returning Canadians numbered 113,800, down 3.5% from 118,000.

This put total rail, bus, boat and plane entries in the first four months of 1954 at 578,774, a drop of 3% from 596,737 a year earlier. Foreign travellers were about 1% fewer than in 1953 at 219,228 versus 221,688, while returning Canadians were 4% fewer at 359,546 versus 375,049.

April boat entries of foreign travellers were up 23% this year at 3,174 versus 2,631, and plane arrivals 12% at 15,404 versus 13,775, while rail entries were off 5% at 27,534 versus 29,052, and bus arrivals 1% at 15,189 versus 15,377. In the four months a drop in rail entries of foreign travellers to 107,666 from 117,319 outweighed gains of 3% to 50,941 from 49,316 in bus arrivals, 9% to 7,635 from 6,978 in boat arrivals, and 10% to 52,986 from 48,075 in plane arrivals.

Plane arrivals of returning Canadians were up over 5% in April this year at 22,060 versus 20,938, but this increase was more than offset by declines in rail arrivals to 48,263 from 49,992, bus arrivals to 38,299 from 41,321, and boat arrivals to 5,182 from 5,793. In January-April, rail traffic was down 4% to 151,472 from 158,112, bus traffic 7% to 119,671 from 128,770 and boat traffic 24% to 15,058 from 19,861, while plane traffic was up 7% to 73,345 from 68,306. (9)

A C C I D E N T S

Fewer Motor Vehicle Accidents Reported In Prince Edward Island And Quebec Last Year There were fewer motor vehicle accidents reported last year than in 1952 in Prince Edward Island and Quebec, while fewer were killed in Prince Edward Island, New Brunswick, Manitoba and British Columbia and fewer were injured in Quebec and Saskatchewan, according to the Bureau's annual report.

Motor vehicle accidents reported in Prince Edward Island numbered 982 last year as against 1,041 in 1952, and in Quebec totalled 88,699 versus 99,153. In Nova Scotia the number reported increased to 8,984 from 8,519, in New Brunswick to 4,886 from 4,329, in Ontario to 65,866 from 58,515, in Manitoba to 12,838 from 10,254, in Saskatchewan to 16,758 from 9,463, in Alberta to 16,964 from 14,697, in British Columbia to 22,096 from 21,189, and in the Yukon and Northwest Territories to 337 from 245.

The number killed in motor vehicle accidents decreased in Prince Edward Island to 13 from 28 the year before, in New Brunswick to 97 from 117, in Manitoba to 101 from 107 and in British Columbia to 208 from 209. The number of deaths increased in Nova Scotia to 124 from 120, in Quebec to 901 from 859, in Ontario to 1,082 from 1,010, in Saskatchewan to 124 from 106, in Alberta to 220 from 139, and in the Yukon and Northwest Territories to 7 from 4.

The number of persons injured in motor vehicle accidents dropped to 8,923 from 12,706 in Quebec and to 3,393 from 3,451 in Saskatchewan. The number injured rose to 234 from 189 in Prince Edward Island, to 2,536 from 2,315 in Nova Scotia, to 1,507 from 1,228 in New Brunswick, to 24,353 from 23,634 in Ontario, to 3,102 from 2,867 in Manitoba, to 4,238 from 3,839 in Alberta, to 7,737 from 7,197 in British Columbia and to 109 from 90 in the Yukon and Northwest Territories.

There were 2,692 motor vehicle accidents in Newfoundland last year and 29 persons were killed and another 602 injured. Comparable figures for 1952 are not available. (10)

EMPLOYMENT & EARNINGS

Hourly Earnings Higher, Work Week Shorter In Manufacturing At May 1 Average hourly earnings in manufacturing rose to a new peak of 141.9 cents at May 1 from 141.0 at April 1, but a drop of 0.3 hours in the length of the average working week to 40.6 from 40.9 hours resulted in a small decline in average weekly wages to \$57.61 from \$57.67. In durable goods plants, average hourly earnings rose 0.7 cents from the April 1 level, due largely to wage-rate increases and overtime work at premium rates of pay. Average hourly earnings in non-durable goods plants were up 1.1 cents at May 1, due partly to the lay-off of seasonal help in tobacco and other industries, and partly to wage increases and overtime payments. The average working week was shorter in both branches of manufacturing.

The mining industry as a whole reported longer working hours and the average hourly and weekly earnings were also higher at May 1 than a month earlier. Employment in coal mines continued to fall off but the average working week was substantially longer than at April 1. The averages of hours and earnings were lower in both branches of the construction industry as employment of lower-paid casual help increased considerably. Wage-rate increases were reported in the hotel and restaurant group.

Average Hours and Earnings of Hourly-Rated Wage-Earners
Reported in Specified Industries in Weeks Ending Dates Shown

Industry	Average Hours			Average Hourly Earnings			Average Weekly Wages		
	May 1	Apr. 1	May 1	May 1	Apr. 1	May 1	May 1	Apr. 1	May 1
	1953	1954	1954	1953	1954	1954	1953	1954	1954
	no.	no.	no.	c	c	c	\$	\$	\$
Manufacturing	41.8	40.9	40.6	135.5	141.0	141.9	56.64	57.67	57.61
Durable Goods	42.2	41.0	40.9	146.8	151.7	152.4	61.95	62.20	62.33
Non-Durable Goods	41.5	40.7	40.4	122.4	129.0	130.1	50.80	52.50	52.56
Mining	42.4	41.6	42.1	153.7	157.3	158.0	65.17	65.44	66.52
Electric and Motor									
Transportation	45.1	45.4	45.2	134.5	139.0	139.3	60.66	63.11	62.96
Construction	41.0	40.4	39.4	144.3	152.8	151.4	59.16	61.73	59.65
Service	42.2	41.0	41.2	78.1	82.4	83.4	32.96	33.78	34.36

Labour Income Higher In April Canadian labour income in April totalled \$954,000,000, slightly larger than the preceding month's \$943,000,000 and moderately above last year's \$946,000,000 which included retroactive wage payments to railway employees. The January-April total was \$3,792,000,000, 1.5% above last year's \$3,727,000,000. Advances in total wages and salaries were recorded during April in construction (\$5,000,000) and in the distributive industries (\$6,000,000), accompanying the seasonal revival of activity in building, water transportation and trade; there was also an increase of \$3,000,000 in the finance and services group.

The totals for the primary industries and for manufacturing decreased \$3,000,000 and \$1,000,000, respectively. The loss in the primary group reflected further reductions in logging operations which outweighed a modest upturn in agriculture. Leather products, clothing, iron and steel products, and transportation equipment were some of the manufacturing groups with declines. Contraction not only in employment but also in the average factory week and premium overtime pay contributed to the decline in manufacturing. The index of employment (1949=100) for manufacturing stood at 107.3 at the end of April as compared with 113.1 a year earlier. Average hours worked per week declined to 40.9 from 42.1. On the other hand, hourly wage rates were up about 3%. April labour income by main groups, with last year's figures in brackets (in millions): agriculture, forestry, fishing, trapping, mining, \$59 (\$60); manufacturing, \$322 (\$328); construction, \$59 (\$63), utilities, transportation, communication, storage, trade, \$251 (\$251); finance, services, including government, \$229 (\$210); and supplementary labour income, \$34 (\$34). (11)

MANUFACTURING

Steel Ingot Output Down In May Canadian production of steel ingots in May amounted to 252,988 tons, slightly above the preceding month's 247,872 tons but nearly 30% below last year's May output of 358,896 tons. Cumulative production for this year's January-May period was 1,290,627 tons, 25% under last year's 1,723,649. Daily average output for May was 8,161 tons compared with 8,262 in April and 11,577 a year ago. The five-month daily average worked out at 8,547 tons as compared with 11,415. (12)

Washing Machine Output Cut One-Quarter In Four Months Production of domestic-type washing machines was cut by one-quarter in the first four months of this year to 67,821 from 90,455 in January-April last year. April output dropped to 18,633 from 24,798. Factory shipments were off to 21,059 from 22,445 in the month, and to 70,813 from 83,445 in the four months. April-end stocks were up to 26,343 from 25,263 last year.

More washing machines were shipped this April to dealers in Quebec, the Prairie Provinces and British Columbia, but fewer to those in Newfoundland, the Maritime Provinces and Ontario. January-April shipments were higher only to British Columbia. Export shipments were lower in both April and the four months. (13)

Manufacturers' Shipments Down 3.5% In Value In First Quarter Canadian manufacturers' shipments in the first 1954 quarter were valued at \$4,111,797,000, down 3.5% from the preceding year's \$4,260,202,000, according to estimates contained in the second issue of a new quarterly publication by the Bureau.

Shipments of consumers' goods in the quarter were slightly higher at \$2,605,780,000 as compared with \$2,603,723,000. Non-durables rose to \$1,562,803,000 from \$1,478,009,000, but semi-durables fell to \$524,051,000 from \$600,775,000, and durables to \$518,926,000 from \$524,939,000. Shipments of producers' goods declined to \$753,437,000 from \$837,809,000, capital goods to \$477,074,000 from \$513,833,000, and construction goods to \$275,506,000 from \$304,837,000.

Shipments were highest in value in the foods and beverages group of industries at \$786,360,000 compared with \$754,539,000, second highest in transportation equipment at \$549,752,000 compared with \$555,403,000, and third highest in iron and steel products at \$437,317,000 as compared with \$503,972,000. Paper products followed with shipments valued at \$385,970,000 (\$367,136,000 in the same 1953 period), non-ferrous metals at \$264,141,000 (\$310,254,000), and wood products at \$254,330,000 (\$278,562,000).

The quarter's shipments by manufacturers of chemicals and allied products were valued at \$216,552,000 (\$220,002,000); products of petroleum and coal, \$203,043,000 (\$185,437,000); clothing, \$200,594,000 (\$225,801,000); electrical apparatus, \$199,179,000 (\$208,263,000); textile products, except clothing, \$153,480,000 (\$197,159,000); printing and publishing, \$144,324,000 (\$130,426,000); non-metallic mineral products, \$78,631,000 (\$81,548,000); rubber products, \$65,940,000 (\$69,209,000); leather products, \$60,663,000 (\$62,697,000); tobacco and tobacco products, \$50,446,000 (\$48,340,000); and miscellaneous industries \$61,045,000 (\$61,454,000). (14)

Municipal Waterworks Used More Chemicals Last Year Municipal waterworks across Canada used more of most chemicals last year than in 1952, according to a special survey by the Dominion Bureau of Statistics. Consumption of alum, the principal chemical in quantity terms in Quebec, Ontario, Saskatchewan and Canada as a whole, increased to 15,827,000 pounds from 14,843,000 in the preceding year. Consumption of lime, the main chemical used in Manitoba and Alberta, rose to 12,556,000 from 12,025,000 pounds. Consumption of chlorine, the principal chemical in the Maritime Provinces and British Columbia, advanced to 2,681,000 from 2,468,000 pounds. (15)

PROVINCIAL FINANCE

Per Capita Net Direct & Indirect Debt
Decreased In Four Provinces Last Year

Four provinces reduced their per capita net direct and indirect debt last year, but increases in the other provinces raised the 10-province average \$10.24 or 5% to \$228.57 per Canadian, the Bureau discloses in its annual report on this aspect of provincial finances. Provincial net direct and indirect debt totalled \$3,372,766,000 at March 31 last year, \$277,722,000 or 9% more than on the same date in 1952.

The decreases in per capita net direct and indirect debt ranged from a drop of \$19.63 to \$214.33 in British Columbia to a slight decline of one cent to \$158.27 in Quebec. A reduction of \$8.34 to \$105.92 gave Alberta the lowest per capita figure, and in Prince Edward Island the average was cut by \$3.90 to \$169.48.

Sharpest increases were \$30.76 to \$319.60 in Ontario and \$27.75 to \$126 in Newfoundland, which in 1952 had the lowest per capita figure. In Manitoba the average rose by \$15.71 to \$191.91, and in Saskatchewan by \$7.25 to \$202.72. New Brunswick continued to have the highest per capita figure with an increase of \$2.92 to \$338.04. Smallest advance was \$2.80 to \$279.09 in Nova Scotia.

Total net direct and indirect debt was reduced 6% in British Columbia and 4% in Alberta last year. Increases in the other provinces ranged from less than 1% in Prince Edward Island to 31% in Newfoundland. In Ontario the total rose by 14%, in Manitoba 10%, in Saskatchewan 6%, in New Brunswick 3%, and in Quebec and Nova Scotia by 2%. Both net direct debt and net indirect debt decreased in Alberta during the fiscal year, but in British Columbia a drop in net direct debt outweighed an increase in net indirect debt. Declines in net indirect debt in Nova Scotia, Quebec, Manitoba and Saskatchewan were more than offset by advances in net direct debt, while in Newfoundland, Prince Edward Island, New Brunswick and Ontario both net direct debt and net indirect debt increased.

Total Net Direct & Indirect Debt		
March 31		
	1952	1953
	\$'000	\$'000
Nfld.	36,744	48,258
P.E.I.	17,859	17,965
N. S.	180,416	185,035
N. B.	176,269	181,190
Que.	660,269	675,647
Ont.	1,376,611	1,565,118
Man.	140,605	155,255
Sask.	164,784	174,537
Alta.	110,829	106,131
B.C.	280,275	263,640
Total	3,145,044	3,372,766

The 10-province totals of both net direct debt and net indirect debt rose in 1953, with the largest increase in the latter. Provincial net direct debt advanced \$83,207,000 or 4% to \$2,280,642,000, the per capita figure increasing \$2.01 to \$154.56. Provincial net indirect debt rose by \$144,515,000 or 15% to \$1,092,124,000

and the per capita figure advanced by \$8.27 to \$74.01. At March 31 last year per capita net direct debt ranged from \$38.40 in Newfoundland to \$318.43 in New Brunswick, and per capita net indirect debt ranged from 49 cents in Manitoba to \$146.44 in Ontario. (15)

Proportion Of Bonded Debt Of Provinces Payable
Only In Canadian Funds Dropped Again Last Year

For the second year in a row the total bonded debt of the 10 provinces increased in 1953 while the proportion payable only in Canadian funds decreased. Provincial bonded debt totalled \$2,371,033,000 at March 31 last year, \$161,714,000 or 7% more than on the same date in 1952, and 64% as compared with 66% was payable only in Canada. As in the preceding fiscal year, the proportion payable only in New York rose, increasing to 15% from 12%.

Prior to 1952, the proportion of the bonded provincial debt payable only in Canadian funds had been on the increase for many years, reaching a peak of 73% in 1951. The reverse had been true for the proportion payable only in New York, which had dwindled to nothing by 1949, was still nil in 1950, and amounted to less than 1% in 1951.

Last year the total amount payable only in Canada increased by \$72,463,000 or 5% to \$1,522,623,000, while the total amount payable only in New York rose by \$93,230,000 or 35% to \$358,255,000. The amount payable in New York and Canada showed a slight advance to \$297,243,000 from \$296,047,000. The amount payable only in London was unchanged at \$16,643,000, as was the amount payable in London and Canada at \$3,499,000, but the amount payable in London, New York and Canada declined to \$172,770,000 from \$177,945,000 at March 31, 1952.

The proportion of the gross bonded debt payable only in Canadian funds dropped in both 1952 and 1953 in all provinces except Newfoundland, Prince Edward Island and Manitoba. All of Newfoundland's bonded debt was payable only in Canada in the last two years as compared with four-fifths of the total in 1951. In Prince Edward Island the proportion dropped sharply in 1952, but increased slightly last year. Manitoba's proportion rose last year to a higher figure than in 1951, following a marked decrease in 1952. At March 31 last year the proportion of the gross bonded debt payable only in Canadian funds was lowest in Alberta (where 18% of the total is payable in New York and Canada) at 1.5%, and, except for Newfoundland, was highest in Prince Edward Island at 87%.

Percentage Of Bonded Debt Payable Only In Canada	At March 31		
	1951	1952	1953
Nfld.	80	100	100
P.E.I.	100	86	87
N.S.	85	74	63
N.B.	80	79	77
Que.	81	75	73
Ont.	74	66	65
Man.	70	65.5	71
Sask.	66	62	51
Alta.	2	1.8	1.5
B.C.	75	55	54
Total	73	66	64

In 1951 only Saskatchewan and British Columbia had amounts payable only in New York, but in both 1952 and 1953 all provinces except Newfoundland and Alberta reported such amounts. At the end of March last year the proportion of the gross bonded debt payable only in New York ranged from 5% in New Brunswick to 31% in Saskatchewan. In Ontario it was 17%, in Quebec 16%, in British Columbia 15%, in Manitoba and Prince Edward Island 13%, and in Nova Scotia 11.5%. During the fiscal year the amount payable only in New York increased in Quebec, Ontario and Saskatchewan, showed no change in Prince Edward Island, Nova Scotia, Manitoba and British Columbia, and declined in New Brunswick. (16)

BUSINESS & BANKING

Cheques Cashed In Clearing Centres Increased 8% In May

Cheques cashed in clearing centres in May rose 8% as compared with a year earlier and the advance in the January-May period was almost 5%. The month's total was \$12,611,000,000 as compared with \$11,630,000,000, bringing the cumulative figure to \$60,497,000,000 as compared with \$57,682,000,000.

Debits were lower in the Prairie Provinces both in May and the five-month period, but there were advances in the other four economic areas. The rise in the Atlantic Provinces in May was 0.5% (6.7% in January-May); Quebec, 17.3% (8.7%); Ontario, 11% (5.1%); and British Columbia, 0.9% (7.6%). The decline in the Prairie Provinces was 6% in the month and 3.8% in the cumulative period.

January-May totals by economic areas, with last year's figures in brackets, were as follows (in thousands): Atlantic Provinces, \$1,768,992 (\$1,657,618); Quebec, \$17,331,463 (\$15,941,299); Ontario, \$27,410,290 (\$26,067,883); Prairie Provinces, \$9,192,116 (\$9,558,672); and British Columbia, \$4,794,334 (\$4,456,824). (17)

FOOD & AGRICULTURE

Crop Conditions Across Canada In Prince Edward Island and Nova Scotia the weather has been dry recently and this is beginning to have some detrimental effect on crops. Haying is about one-third completed with a satisfactory crop reported in Prince Edward Island. Grain is looking well and beginning to head, and the potato crop is promising.

In the eastern area of Nova Scotia dry weather has reduced grain and hay prospects, but elsewhere the outlook is better although the weather has been dry and rain is needed. Hay-making is about half completed and the crop is described as fair to good. Potatoes are in bloom. In New Brunswick the weather has continued cool and wet, hampering farm work. The hay crop is heavy and, although later than usual, grain and potatoes are growing well with early fields starting to blossom.

Cutting of fall wheat has begun in early areas in Ontario and is expected to be fairly general in the major producing counties by next week. Yields are expected to be about average and quality appears to be excellent. Hay crops developed well during the past month and good yields are expected in all regions except the counties bordering Lake Erie where lack of rain has resulted in below-average yields. Haying is somewhat later than normal, particularly in Eastern Ontario where excessive rainfall and humid weather have interfered with curing. A large volume of grass silage was put up this year.

Spring grains have improved greatly in all parts of the province except in the area bordering Lake Erie where yields may be reduced by as much as 25 per cent. Late crops have developed well except for special crops in Essex, Kent, Elgin and parts of Middlesex and Lambton where growth has been adversely affected by lack of rainfall. Tobacco is also developing well, and fruit and vegetable crops have improved as a result of rains and warmer weather in most areas. Pastures have been fairly good except in the dry area but now need rain in the southern counties of the central and southwestern parts of the province.

An above-average crop of hay is being harvested in Quebec. However, frequent rains have hampered haying operations and adversely affected quality. Large quantities of grass silage have been put up. Cereals, which were sown two weeks later than usual have germinated well but have begun to yellow in low, poorly drained soils. Pastures are excellent in all areas. Special crops are doing well.

The strawberry harvest is completed in the Montreal area and is at its peak around Quebec where yields so far have been good. Other small fruits and early vegetables also promise a good crop. Orchards are now being sprayed. Blossoms on fruit trees were plentiful and fruit crop prospects are good. In general, crop conditions are satisfactory throughout the province. However, if rains persist the outlook in a number of areas might be altered within a matter of days.

A general improvement in crop conditions has occurred during the past week in the Prairie Provinces. Warmer weather and generally adequate moisture supplies have promoted rapid growth in most areas. Early-seeded grains are heading, especially in southern areas. A considerable proportion of the grain, however, in most areas was seeded late and development varies greatly with some crops just nicely started.

Moisture supplies are generally sufficient to support the heavy stands but rain is needed now in west-central Saskatchewan and southern Alberta. Rust still constitutes a threat to the crop over wide areas with the extent of loss dependent upon weather conditions between now and harvest. It is difficult to assess the extent of crop drowning but it has been serious in local areas. Losses from hail and insects have been minor to date but the potential threat of frost to late seeded crops remains.

During the first ten days of July the weather in British Columbia was generally cool and cloudy with frequent showers. Since the week end of July 10-11 warmer and more settled weather has prevailed. Moisture conditions appear quite adequate in practically all areas. Although growth of grain crops is about ten days to two weeks behind normal, the condition of these crops is generally satisfactory. Haying operations have been quite difficult due to wet weather throughout the province and an increase in the amount of grass silage is evident. Fall-seeded cereals are reported in head in the Quesnel district. (18)

Wheat Supplies 45% Larger Than Last Year At June 30

Visible supplies of Canadian wheat in store or in transit in North America totalled 349,451,000 bushels at June 30, some 6,809,000 or 2% more than a week earlier and 108,206,000 or 45% more than on July 2 last year. During the week ended June 30 Prairie farmers marketed 11,074,000 bushels, twice as much as the 5,524,000 bushels marketed in the week ending July 2, 1953. However marketings in the first 11 months of the current crop year totalled only 336,629,000 bushels, some 106,565,000 or 24% less than in the August-June period of the 1952-53 crop year.

Marketings of oats by Prairie farmers during the week ended June 30 were up to 2,418,000 bushels from 2,105,000 in the week ended July 2 last year. Marketings of barley were up to 2,441,000 bushels from 1,945,000, and rye to 355,000 from 311,000, but flaxseed declined to 57,000 from 75,000. In the first 11 months of the current crop year marketings of oats were down to 78,540,000 bushels from 90,153,000 a year earlier, barley to 84,323,000 from 136,309,000, rye to 8,936,000 from 14,012,000 and flaxseed to 7,092,000 from 7,814,000. (19)

Wheat Supplies And Exports Of Four Major Exporting Countries

Supplies of wheat remaining on or about June 1 in the four major wheat export countries for export and for carryover at the end of their respective crop years amounted to 1,725,100,000 bushels, some 40% greater than the 1,232,100,000 a year ago.

Estimates supplies in each of the four countries on June 1, with year earlier figures in brackets, were as follows: United States, 878,300,000 bushels (574,300,000); Canada, 614,500,000 (457,200,000); Australia, 132,500,000 (79,000,000); and the Argentine, 99,800,000 (121,600,000).

Total exports of wheat and wheat flour from these four countries in the first 10 months (August-May) of the current Canadian crop year amounted to 525,000,000 bushels, down 23% from last season's shipments of 681,500,000 bushels. Exports from Canada declined to 208,700,000 bushels from 297,500,000, the United States to 169,900,000 from 279,900,000, and Australia to 52,300,000 bushels from 84,800,000, but Argentina's exports rose to 94,100,000 bushels from 19,200,000.

While Canadian exports have declined about 30% from a year earlier, exports from the United States and Australia have dropped by some 39% and 38%, respectively. Reduced shipments from these three countries have been only partially offset by the sharp increase (390%) in Argentine exports from the extremely low level of shipments from that country in August-May, 1952-53.

Canada's share of the total exports from the four countries has remained relatively constant between the two periods, shipments during the first ten months of the 1952-53 crop year having accounted for 43.7% of the total as compared with 39.8%. The United States' share dropped to 32.4% from 41.1%, while Australia's share declined to 10% from 12.4%. Following a near crop failure in 1951-52 the Argentine harvested larger crops in 1952-53 and 1953-54. Reflecting the improved supply position, Argentina's share of the four countries' exports during August-May, 1953-54 amounted to 17.9% as against 2.8%.

These four countries account for the bulk of the world's wheat exports. However, preliminary and incomplete data indicate that total exports during the current season from countries other than the four principal exporters are remaining ahead of a year ago. (21)

More Creamery Butter, Poultry, Eggs, Skim Milk, Ice Cream In Stock July 1 Stocks of creamery butter, skim milk powder, ice cream, poultry and eggs were higher at the start of July than on the same date last year, but holdings of cheddar cheese, evaporated whole milk and frozen cream were lower. Creamery butter stocks totalled 74,162,000 pounds, 13,600,000 more than a year earlier. Cheddar cheese holdings amounted to 33,608,000 pounds, some 2,600,000 below last year. Stocks of evaporated whole milk were 5,800,000 pounds lower at 48,950,000, while holdings of skim milk powder were up 388,000 pounds at 14,233,000. Ice cream stocks were 215,000 gallons higher at 1,293,000, and frozen cream holdings were 239,000 pounds lower at 330,000. Stocks of poultry totalled 14,649,000 pounds, 7,500,000 more than on July 1 last year, and holdings of eggs amounted to 513,000 cases, some 9,000 more than last year. (21)

Dairy Factory Production Up In June And Half Year More creamery butter, cheddar cheese, ice cream and concentrated milk products were made in June and the first six months this year than in the same periods of 1953. Domestic disappearance of creamery butter and ice cream also increased in both periods in 1954.

Creamery butter output rose 1% in June to 46,450,000 pounds from 46,185,000 last year, and domestic disappearance advanced 5% to 24,366,000 pounds from 23,243,000. January-June production was up 2% this year to 139,690,000 pounds from 136,536,000, and domestic disappearance 5% to 136,678,000 pounds from 130,233,000. June output of cheddar cheese was 11% higher this year at 13,565,000 pounds versus 12,204,000, while six-month production was 1% higher at 33,423,000 pounds versus 33,081,000.

June output of ice cream was up 8% this year at 3,856,000 gallons versus 3,581,000 last year, and domestic disappearance was 4% higher at 3,767,000 gallons against 3,628,000. January-June production rose 2% to 13,151,000 gallons from 12,955,000, and domestic disappearance 1% to 12,677,000 gallons from 12,587,000. Production of concentrated milk products advanced 1% in June to 63,148,000 pounds from 62,767,000, and 2% in the half year to 225,097,000 pounds from 221,327,000. Output of whole milk products was about the same as a year earlier in June and was 3% higher in the half year, with more whole milk powder and evaporated milk made but much less condensed milk produced. Production of milk by-products was up 3% in June but down 2% in the six months, with increases for condensed buttermilk and casein in the half year but decreases for condensed skim milk, evaporated skim milk, skim milk powder, powdered buttermilk and whey powder. (22)

6% More Process Cheese Made In First Six Months Of 1954 Despite an 11% cut in June production this year to 2,966,000 pounds from 3,334,000 last year, output of process cheese was up 6% in the first six months this year to 22,016,000 pounds from 20,840,000 in the first half of 1953. The June production was 3% above the revised May output of 2,876,000 pounds. Stocks held by manufacturers at the end of June totalled 1,254,000 pounds, down from 1,731,000 a month earlier but up from 1,092,000 last year.

More Margarine Made In First Six Months Margarine production in the first half of 1954 amounted to 56,496,000 pounds, an increase over the 54,120,000 pounds made in the first six months of last year. June output rose to 9,547,000 pounds from 9,394,000 last year, and followed increases in the four previous months and a decline in January. July 1 stocks totalled 3,385,000 pounds, up from 3,152,000 a month earlier but down from 3,556,000 on the same date last year. (23)

Meat Stocks Reduced At July 1 This Year Cold storage stocks of meat totalled 78,570,000 pounds at July 1, some 2,119,000 or 3% less than on June 1 and 21,517,000 or 21% less than at the start of July last year. Main drop was in holdings of frozen meat, which fell to 49,653,000 pounds from 51,407,000 at June 1 and 71,463,000 at July 1 last year. Stocks of fresh meat totalled 16,017,000 pounds at July 1, down from 17,203,000 at June 1 but up from 14,868,000 at the start of July last year. Holdings of cured meat amounted to 12,900,000 pounds, slightly above the June 1 stocks of 12,079,000 but down from 13,756,000 a year earlier. (24)

RELEASED THIS WEEK

(Publications are numbered similarly to news items to indicate source of latter)

- 1 - M: Index Numbers of Farm Prices of Agricultural Products, May, 10¢
- 2 - New Motor Vehicle Sales & Motor Vehicle Financing, May, 20¢
- 3 - Department Store Sales & Stocks, May, 10¢
- 4 - Chain Store Sales & Stocks, May, 10¢
- 5 - M: Transit Report, April, 10¢
- 6 - M: Railway Carloadings, Period Ended June 30, 10¢
- 7 - M: Railway Freight Traffic, March, 10¢
- 8 - M: Railway Operating Statistics, April, 10¢
- 9 - Travel Between Canada & the United States, May, 20¢
- 10 - Motor Vehicle Accidents, 1952 & 1953, 25¢
- 11 - Estimates of Labour Income, April, 10¢
- 12 - Steel Ingots, May, 10¢
- 13 - M: Domestic Washing Machines, April, 10¢
- 14 - Estimated Value of Manufacturers' Shipments, First Quarter, 1954, 25¢
- 15 - Consumption of Chemicals in Municipal Waterworks, 1952 & 1953, 25¢
- 16 - Financial Statistics of Provincial Governments, 1952: Direct & Indirect Debt, 25¢
- 17 - Cheques Cashed In Clearing Centres, May, 10¢
- 18 - Telegraphic Crop Report, Canada, 10¢
- 19 - Grain Statistics, Week Ended June 30, 20¢
- 20 - The Wheat Review, June, 25¢
- 21 - M: Stocks of Dairy & Poultry Products, July 1, 20¢
- 22 - M: Dairy Factory Production, June, 10¢
- 23 - M: Margarine Statistics, June, 10¢
- 24 - M: Stocks of Meat & Lard, July 1, 10¢
- Quarterly Bulletin of Agricultural Statistics, January-March, 25¢
- Canadian Statistical Review, June, 35¢

M: Memorandum

Edmond Cloutier, C.M.G., O.A., D.S.P., Queen's Printer and Controller of Stationery
Ottawa, 1954

Musical Instruments: 15 Ontario firms account for about 52% of the industry's output. Eight concerns in Quebec and British Columbia produce the balance.

...

Beer: Canada exported 1,742,000 gallons in the 12 months ended March 31 last year. Almost 91% went to the United States, 5% to Trinidad and Tobago, and the rest to 12 other countries.

...

Creamery Butter: Average factory price was 58.9¢ a pound last year as compared with 59.7¢ in 1952 and 63.1¢ in 1951. In 1953 average prices ranged from 58.5¢ in Quebec and Alberta to 64¢ in British Columbia.

...

Steel Cutlery: Factory sales of paring knives, bread knives, army utility knives, scissors and unplated table cutlery were valued at a record \$1,985,000 in 1952, close to two and a half times the \$817,520 worth sold five years earlier.

...

Railway Track: 494,361 tons of rails weighing from 50 to 132 pounds per yard were laid at a cost of \$26,010,455 in 1952. New track totalled 206,787 tons and cost \$19,291,370, and relay and other track totalled 287,574 tons and cost \$6,719,085.

...

Minerals: Ontario provided 34.6% of the \$1,331,000,000 worth produced last year, Quebec 19%, Alberta 18.5%, British Columbia 12.1%, Nova Scotia 5%, Saskatchewan 3.6%, Newfoundland 2.5%, Manitoba 1.9%, the Yukon 1.1%, New Brunswick 0.9% and the Northwest Territories 0.8%.

...

Sales of repair parts for farm implements and equipment increased by \$587,000 or 2% to \$31,819,000 last year, with Saskatchewan taking 31.8 as against 31.3% of the total, Alberta 23.4 as against 23.6%, Ontario 19.1 as against 19.8%, Manitoba 12.5 as against 12.2%, Quebec 8.3 as against 7.8%, and other provinces 4.9 as against 5.3%.

...

Refineries received 12,339,000 barrels of crude oil in the first quarter this year, 2,158,000 or 21% more than last year. Canadian wells supplied over 53% of the 1954 total, while almost 67% of the 1953 total was imported.

...

Films: 1,172 theatre trailers were produced last year, 279 more than in 1952.

...

Transport: Freight and passenger motor carriers average about six vehicles each. At last count, 4,275 operators owned 11,368 trucks, 4,081 tractor semi-trailer units, 3,281 trailers and 4,874 buses.

...

Zinc: 80,783 tons were produced in the first quarter this year, 21,678 or 21% less than last year.

...

Button, buckle and fastener industry is concentrated in the two largest provinces. There are 32 firms in Quebec and 13 in Ontario, but the Ontario plants account for over 55% of the total output and 56% of the industry's employees.

...

Furnace Oil: 402,921,000 gallons were sold in the first three months of this year, 75,899,000 or 23% more than in the first quarter last year.

...

Fisheries: In quantity terms herring and sardines were the major items in New Brunswick's 1952 commercial fish catch, accounting for 34% and 21% of the total landings. In value terms the most important items were lobsters and sardines, which accounted for 32% and 22% of the total marketed value.

...

Requests, donations and gifts from Canadians to persons in other countries were almost seven times as valuable last year as the requests, donations and gifts received by Canadians from persons in other countries. The former totalled \$4,200,000, some \$268,000 or 7% more than in 1952, while the latter amounted to \$621,000, \$154,000 or one-fifth less than in the preceding year.

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