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## HIGHLIGHTS OF THIS ISSUE

Agriculture: A rust epidemic — perhaps the worst in history — swept through Prairie wheat fields in August and aided by excessive moisture, sawflies, wind and hail reduced 1954 crop prospects to 377,900,000 bushels by September 1, a cut of 26% from the August 1 forecast of 513,000,000 bushels and far below both the 1953 crop of 614,000,000 bushels and the 1944-53 average of 456,500,000. Other grains were also hard hit and for most, yields are now expected to be substantially below those of last year... Farmers in nine provinces took in an estimated \$1,093,900,000 from the sale of farm products and from participation payments on previous year's wheat crops in the first half of this year, 7.5% less than in 1953 and 12% less than the record returns of the first 6 months of 1951. (Pages 21 & 23)

Housing: New housing construction showed a sharp increase over last year in July, with starts up by almost one-fifth and completions by nearly 23%. Seven-month tally: 3% more new dwelling units started, 8% more completed than in 1953, the all-time record year. (Page 2)

Merchandising: Department store sales were nearly 15% higher than last year in the week ending September 4... Sales of wholesalers in 9 trades averaged 2% lower than last year in July... Chain stores in 6 trades rang up increased sales this July, gains over last year ranging from less than 1% in drug stores to 23% in grocery and combination food stores. (Page 4)

Prices: Nine of the 10 regional consumer price indexes moved higher between July 2 and August 2, while one showed no change. Seasonally higher prices for several foods, particularly potatoes, and advances in rents were responsible for the increases... Farm prices of agricultural products were slightly lower in July than in June, a decline in livestock prices outweighing increases in dairy products, potatoes, poultry and eggs. (Page 10)

Manufacturing: The motor vehicle industry cut July shipments 46% this year as the decline in dealer sales from last year's record level intensified... The slump in the steel industry continued in July with ingot output off 19% from last year. Seven-month production was down 24%... Outputs of leather footwear and sawn lumber were both down in the first half. (Pages 11-13)

Labour: Lower hourly wages were more than offset by a longer work-week in manufacturing at July 1 and average weekly earnings rose to \$57.39 from \$56.60 at June 1... The live unemployment register listed over 5% fewer at the end of July than at the end of June. (Pages 17 & 18)

Sharp Advance In July In  
New Housing Construction

Sparked by an upswing in starts in the Maritimes and western Canada and in completions west of Quebec, new housing construction showed a sharp increase over last year in July. Advance figures show that 14,191 new dwelling units were started in the month, 2,357 or almost one-fifth more than in July last year, while 8,383 new units were completed, an increase of 1,555 or nearly 23%.

The jump in starts put the total for the first seven months of 1954 at 60,589, up 2,009 or 3% from year earlier, the first time this year that cumulative starts have topped last year's total. Declines in Newfoundland, Nova Scotia and Quebec in seven-month starts were overbalanced by increases in the other provinces. January-July completions totalled 49,955 this year, an increase of 3,636 or 8% over 1953, decreases in Newfoundland, New Brunswick and Quebec being outweighed by gains in the rest of the country. The number of new dwelling units under construction at the end of July was 69,874 this year, 1,658 or over 2% more than a year earlier. The number under construction at July 31 was down from last year in Prince Edward Island, Nova Scotia, New Brunswick, Manitoba, Saskatchewan and Alberta, but increases in Newfoundland, Quebec and Ontario were strong enough to outweigh these declines.

July starts in the Maritime Provinces jumped to 1,305 this year from 444 last year, in the Prairie Provinces to 3,008 from 2,208, and in British Columbia to 1,041 from 725. There were smaller increases in Ontario, to 4,368 from 4,071, and Quebec, to 4,234 from 4,068. Newfoundland starts were lower this July at 235 versus 318. July completions rose substantially in Ontario to 3,369 from 2,671, in the Prairie Provinces to 1,652 from 917, and in British Columbia to 910 from 738. Newfoundland's total showed a slight increase to 127 from 120. Completions in Quebec declined slightly this July to 1,909 from 1,940, and in the Maritime Provinces to 416 from 442.

## T R A V E L

Highway Traffic Across  
Border Up 5% This July

Volume of highway traffic between Canada and the United States was 5% heavier in July than in the corresponding month last year. Border crossings in July totalled 2,098,000 vehicles as compared with 1,990,000 a year earlier, bringing the January-July figure to 7,710,000 as compared with 7,582,000.

Entries of foreign vehicles in July rose to 1,446,5000 from 1,396,900, and seven-month entries increased to 4,760,000 from 4,714,000. Re-entries of vehicles of Canadian registry in July numbered 651,200, up from 593,100, and January-July re-entries rose to 2,950,400 from 2,864,600.

Number of foreign travellers entering Canada by rail, through bus, boat and plane in June was 154,700 compared with 161,100 in June, 1953, bringing the six-month total to 471,965 as compared with 475,363. Canadians returning by these means of transportation in June numbered 116,200 as compared with 121,000 a year ago, and in the January-June period there were 585,517 as compared with 609,783. (1)



65% More Firms Failed In  
First 6 Months This Year

In the first 6 months this year 1,210 businesses went bankrupt, a 65% jump from the 733 commercial failures of the first half of 1953. These figures cover failures under the Bankruptcy and Winding Up Acts, but do not include insolvencies under the Farmers' Creditors' Arrangement Act, the Companies' Creditors' Arrangement Act and the various provincial Bulk Sales Acts. Estimated liabilities totalled \$32,868,000, more than twice as much as in January-June last year.

There were more business failures in the first 6 months this year in all industrial classifications and in all regions. Bankruptcies in the trade sector, where the greatest number of business mortalities usually occur, increased to 530 from 287 in the first half of 1953. Failures of manufacturing establishments numbered 226 as against 158, while insolvencies in the service field rose to 209 from 125. In the first-half of 1954 there were 896 commercial failures in Quebec, a sharp increase from 541 a year earlier. Bankruptcies in Ontario rose to 192 from 112, in the four western provinces to 98 from 65, and in the Atlantic Provinces to 24 from 15.

In the second quarter this year 530 businesses failed, an increase of more than 50% over the 351 insolvencies reported in April-June last year. Estimated liabilities were nearly 75% higher at \$15,209,000, the average liability per failure increasing to \$28,700 from \$24,800. (2)

## T R A N S P O R T

Car Loadings Down 7.6%

Car loadings in the January-August period totalled 2,393,662 cars, down 7.6% from last year's 2,647,794. At the same time receipts from connections dropped 13.4% to 954,509 cars from 1,102,672. In the last 10 days of August loadings fell 5.8% to 101,278 cars and receipts from connections were off 25.1% to 34,422 cars.

Over half of the decline in 8 month loadings was attributable to grain which fell 135,339 cars to 221,239. Other commodities carried in fewer cars were iron and steel products, down 6,452 cars to 38,021; logs, posts, poles and piling, down 5,964 cars to 35,080; other forest products, off 3,515 cars to 11,328; automobiles, down 6,786 cars to 55,909; miscellaneous carloadings, off 13,712 cars to 150,339; and L.C.L. shipments down 62,637 cars to 481,189.

Loadings of coal increased 8,606 cars to 156,885, and non-ferrous ores and concentrates rose 6,578 cars to 98,497. (3)

Civil Air Carriers Had  
Larger Deficit In April

Total operating revenues of Canadian air carriers in April advanced 3.2% to \$7,634,426 from \$7,397,494 a year ago. However, operating expenses rose more rapidly to \$7,986,620 from \$7,577,537. As a result the net operating loss rose to \$352,194 from \$180,043. During the month 176,696 passengers were flown as compared with 166,652, freight totalled 6,655,479 pounds as compared with 7,160,222, and mail amounted to 1,946,477 pounds as compared with 1,373,732. (4)

Department Store Sales Advanced 14.7% In Week Department store sales rose 14.7% during the week ending September 4 as compared with a year earlier. All provinces shared in the rise except Saskatchewan where the decline was 1.6%. The rise in the Atlantic Provinces was 0.9%, Quebec 19.9%, Ontario 19.8%, Manitoba 12.6%, Alberta 4.7%, and British Columbia, 18.4%.

Wholesale Sales Off In July July sales of wholesalers in 9 trades surveyed each month by the Dominion Bureau of Statistics averaged 2% lower than in the corresponding month last year and declined 5% from June. As compared with a year earlier 7 of the 9 trades had lower sales, ranging from 7% for hardware to less than one-half of 1% for grocery wholesalers. Sales of fruit and vegetable wholesalers increased almost 5%, and drug sales rose 1%.

There was a decrease of 1% in the value of stocks on hand at the end of July as compared with a year ago. Large decreases were reported by footwear wholesalers (19%), and clothing and dry goods wholesalers (12%). Inventories held by tobacco and confectionery wholesalers increased 14%, fruit and vegetable wholesalers 12%, and grocery wholesalers 8%.

The general index number of sales, on the 1935-39 base, stood at 370.6 in July as compared with 390.9 in June and 379.6 in July last year. (5)

Sales Of Chain Stores Were Higher This July Chain stores in six trades reported higher dollar sales in July than in the same month last year. July 1 stocks were more valuable this year in all trades except women's clothing, while the stock/sales ratio was higher in the hardware, drug and variety trades.

Chain grocery and combination food stores led the sales increases with a 23% boost in volume to \$78,606,000 from \$63,914,000 in July last year. July 1 stocks were nearly one-fifth higher at \$54,337,000 versus \$45,403,000 but the stock/sales ratio was unchanged at 0.7. Women's clothing stores reported a sales increase of over 6% to \$4,354,000. July 1 stocks were 11% lower at \$8,913,000 versus \$10,012,000, and the stock/sales ratio was reduced to 2.0 from 2.4.

Chain hardware stores upped their dollar sales 3% to \$1,238,000 from \$1,202,000 in July last year. July 1 stocks were nearly 11% higher at \$6,613,000 versus \$5,971,000, and the stock/sales ratio was up to 5.3 from 5.0. Sales of chain shoe stores rose over 2% to \$3,735,000 from \$3,647,000, and July 1 stocks showed a similar increase to \$21,091,000 from \$20,591,000, the stock/sales ratio remaining at 5.6.

Sales of chain variety stores were nearly 8% higher this July at \$16,010,000 versus \$14,864,000. July 1 stocks were up over 8% to \$52,062,000 from \$48,050,000, and the stock/sales ratio increased to 3.3 from 3.2. Chain drug stores had sales of \$2,816,000, an increase of less than 1% from \$2,796,000 in July last year. July 1 stocks were over 18% higher at \$10,836,000 versus \$9,179,000, and the stock/sales ratio advanced to 3.8 from 3.3. (6)



Imports Down 7.5% In Half-Year Period Canada's imports from all countries in this year's first-half were valued at \$2,050,100,000, down 7.5% from last year's \$2,216,600,000, according to final figures.

Prices averaged slightly higher than in 1953 but volume declined about 8%. There were reduced purchases from the United States and the United Kingdom, but larger imports from other countries. Commodity-wise there were increased values for the agricultural and vegetable products and wood and paper groups, but declines for the other major sections.

In comparing import statistics for 1953 and 1954 it should be noted that a change in statistical procedure raised the June 1954 import total by an amount estimated at some \$40 million. The apparent increase in the value of imports in June 1954 to \$416,100,000 from \$406,300,000 a year earlier seems to have been due to this factor alone, and comparisons of statistics of these two months for individual areas and commodities were also influenced by this factor. The six-month comparisons also reflect this change in statistical procedure, but here the effect is proportionately very small.

Imports from the United States in this year's six-month period were valued at \$1,502,805,000, down from \$1,672,413,000 a year earlier, and June's total fell to \$296,986,000 from \$299,798,000. In the half-year period the largest decreases occurred in fibres and textiles, iron and products and non-metallic minerals and products. Two groups were higher -- agricultural and vegetable products and wood and paper.

Purchases from the United Kingdom in the six months dropped to \$204,129,000 from \$219,590,000, but June's value rose to \$44,622,000 from \$42,831,000. Main declines in the January-June period appeared in the fibres and textiles and non-ferrous metals groups. Agricultural and vegetable products and chemicals were the only groups to rise in value.

From all other Commonwealth countries this year's six-month imports rose to \$80,807,000 from \$76,457,000, and June's purchases advanced to \$20,071,000 from \$17,122,000. Imports in the half-year were higher from Jamaica, Trinidad and Tobago, British East Africa, and Australia, but lower from British Guiana, Ceylon, Malaya and Singapore, and New Zealand.

Purchases from Latin American countries as a group climbed in the six-month period to \$144,841,000 from \$137,731,000, and were up in the month to \$29,091,000 from \$23,227,000. In the six months increases were posted for Brazil, Colombia, Panama, and Venezuela, but decreases for Argentina, the Dominican Republic and Mexico.

Imports from European countries were slightly higher, rising in the six months to \$80,613,000 from \$80,270,000, and in June to \$17,086,000 from \$16,295,000. Six-month purchases were higher in value from the Federal Republic of Germany and Switzerland, but lower from Belgium and Luxembourg, France, Italy, Netherlands, and Sweden.

Purchases from all other countries in this year's first-half climbed to \$31,090,000 from \$26,280,000, and moved up in June to \$6,681,000 from \$6,126,000. There were increased values in the January-June period for Japan and the Netherlands Antilles but smaller values for Arabia and Lebanon.

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Main Commodity Group Values January-June values by main commodity groups were as follows in millions: agricultural and vegetable products, \$255.0 (\$230.1 in 1953); animals and animal products, \$43.5 (\$45.5); fibres, textiles and products, \$168.2 (\$215.7); wood, wood products and paper, \$82.3 (\$78.3); iron and products, \$735.6 (\$830.5); non-ferrous metals and products, \$163.7 (\$171.7); non-metallic minerals and products, \$274.1 (\$296.8); chemicals and allied products, \$109.4 (\$111.5); and miscellaneous commodities, \$218.2 (\$236.5).

The following table shows the value of Canada's major commodity imports in June and the January-June period, together with corresponding 1953 totals. Commodities are listed in order of size for this year's six-month period. (7&8)

	June		January-June	
	1953	1954	1953	1954
	(In thousands)			
Non-farm machinery .....	\$37,522	\$43,028	\$214,211	\$215,046
Auto parts .....	22,562	18,760	128,519	114,190
Petroleum, crude .....	19,393	22,172	105,095	105,566
Farm implements & machinery .....	23,357	18,589	129,159	91,404
Rolling-mill products .....	11,017	8,483	61,205	54,094
Petroleum products .....	12,271	13,737	56,603	52,993
Engines & boilers .....	11,034	9,488	62,609	52,340
Fruits .....	10,031	13,617	46,039	51,334
Autos .....	13,523	9,417	63,989	49,809
Coal .....	14,387	11,084	59,954	46,559
Cotton products .....	6,902	6,584	53,009	41,107
Coffee & chicory .....	3,656	4,309	29,049	36,603
Books & printed matter .....	5,145	5,955	33,709	33,492
Wool products .....	5,803	5,754	34,808	30,826
Pipes, tubes, fittings .....	7,344	8,357	35,563	30,795
Vegetables .....	5,186	6,102	24,350	25,226
Sugar & products .....	6,439	8,158	23,436	24,852
Synthetic resins & products .....	3,642	4,390	23,188	23,813

## NATIONAL ACCOUNTS

Gross National Product Remained Steady In 2nd Quarter This Year Canada's gross national product remained steady in the second quarter of 1954 at a seasonally adjusted annual rate of \$23.9 billion, according to advance figures. The minor declines in production of the two preceding quarters were not resumed. The level of aggregate output was thus unchanged from the first quarter of 1954 but was almost 2% below last year's annual average of \$24.3 billion.

This decline from last year reflects a substantially lower value of crop production which is now estimated to be \$400 million a year ago. The lower estimate is based on latest available information on expected crop yields.

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In the non-farm sector of the economy, changes in the general level of economic activity are closely approximated by the figures of gross national product excluding accrued net income of farm operators given below:

	Seasonally Adjusted Annual Rates (rounded in billions of dollars)					
	1953				1954	
	I	II	III	IV	I	II
Gross National Product (excluding net income of farm operators)....	22.5	22.7	22.9	22.7	22.5	22.6
Change (computed from unrounded data) .....	+0.2	+0.3	-0.3	-0.1	+0.1	

It appears that the recent declines in total non-agricultural production were halted in the second quarter and that a small increase occurred. Related indicators show that production in durable goods manufacturing, construction, and transportation, communication and storage continued to move downward in the second quarter, following the trends which began in 1953. Declines in these groups, however, were offset by gains in the service industries (except transportation) and in the non-durable goods producing industries, except clothing.

In manufacturing, the major declines in durable goods production from the first to second quarter occurred in transportation equipment, electrical apparatus and supplies and iron and steel products. The transportation, communication and storage group was affected by declines in shipments of grains, motor vehicles and farm implements.

Persons without jobs and seeking work in the second quarter of 1954 constituted 4.4% of the total labour force, compared with 2.3% in the second quarter of 1953. The number of paid workers with jobs showed a decline of 1% from a year ago. However, higher average hourly rates more than offset declines in total employment and in average hours worked so that labour income in the second quarter showed a small increase over last year.

The increase in average hourly earnings in non-durable goods manufacturing amounted to 6.4%, and in durable goods manufacturing to 3.6%; in construction and mining, the gains were 4.6% and 2.8%, respectively. With gains occurring in other elements of personal income as well as wages and salaries, the purchasing power of the personal sector was maintained at a high level in the second quarter of 1954. Personal disposable income was, in fact, more than 5% above the second quarter of a year ago, despite the relative stability of total production.

Pattern Of Demand Total final purchases of goods and services, home produced and imported, (but excluding inventories) were slightly lower in the second quarter of 1954 than a year earlier. Declines occurred in government expenditures, non-residential construction, machinery and equipment, and exports. These declines were only partly offset by a substantial increase in personal expenditure on consumer goods and services, with the result that total final purchases (excluding inventories) fell by about 1%.

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This relatively minor drop in final purchases of goods and services from a year ago was accompanied by a much smaller business inventory accumulation in the second quarter (partly offset by smaller net withdrawals from stocks of grain in commercial channels and farm inventories). Nevertheless, Canadian production as measured by gross national expenditure, remained stable relative to a year ago, since imports fell sharply (by 11% as adjusted for the national accounts), more than offsetting the total decline in final purchases and inventory change.

Personal Expenditure On Consumer Goods & Services Consumer outlays provided the chief source of strength on the demand side in the second quarter, with a gain of 3.1% over last year. This gain was made up of an increase of 1.4% in the consumption of goods and an increase of 6.8% in the consumption of services.

Higher rents accounted for a substantial portion of the gain in outlay for services, but gains were also registered for personal care, household operation and utilities, medical care, education and recreation.

Purchases of consumer durable goods in the second quarter were 6.9% below last year's level, reflecting a decline in retail sales of new automobiles (off 10.2%), appliances and radios, and furniture. The declines in durable goods sales were more than offset by a gain of 3.5% in purchases of non-durable goods. Purchases of food, and tobacco and alcoholic beverages showed marked increases. Clothing showed little change, but gains were registered in a number of other non-durable goods components.

In the seasonally adjusted data, total non-durable goods consumption rose by 2.5% from the first to second quarter, continuing the upward trend of the past three years. Durable goods consumption declined by 6.9%, reflecting in large part a drop in sales of new automobiles.

Government Expenditure On Goods & Services Government expenditure for goods and services (federal, provincial and municipal) were 2.5% below the second quarter of 1953. The decline represented a combination of smaller defence outlays, offset in part by increases for non-defence purposes.

In the first half of 1954, federal defence outlays (on the national accounts basis) have been approximately 10% below the level of the first six months of 1953.

New Residential & Non-Residential Construction Private investment in new residential construction in the second quarter was about 2% above the level of last year. Seasonally adjusted, the figures show a decline from the first to second quarter of 1954 of about 9%. This drop appears to be related to unusually low activity in June; available July data indicate a marked upturn in housing starts and completions.

Private non-residential construction in the second quarter was 6% below last year. The major part of this decline is related to non-residential building construction, with only a small decline shown for private engineering construction. Seasonally adjusted, the data show a small drop between the first and second quarters of this year.

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New Machinery & Equipment Private investment in machinery and equipment was 4.5% down from the same quarter of last year.

This decline was associated with a falling off of sales to business of commercial and passenger vehicles, agricultural implements, and a drop in imports of machinery and equipment. The seasonally adjusted figures show little change from the first quarter.

Change In Inventories Total inventory holdings declined slightly in the second quarter, reflecting the drawing down of stocks of farm inventories and grain in commercial channels. However, these withdrawals were substantially less than a year ago, and were associated with the world grain situation. Net additions to stocks of business inventories were very small in the second quarter, and occurred mainly at the wholesale level. Seasonally adjusted, business inventories showed some liquidation in the second quarter depletions were associated to a very large extent with the working off of inventory stocks of transportation equipment and primary iron and steel products.

Since the second quarter peak of 1953 when additions to business inventory stocks were at a seasonally adjusted annual rate of \$676 million there has been a fairly steady decline in the rate of accumulation. Thus, the reversal from a position of net accumulation to one of net liquidation between the second quarters of 1953 and 1954 was equivalent to about 3% of gross national product. Domestic production was less affected by this reversal than is suggested by the inventory figures, to the extent that part of the inventory decline was met through reduced imports.

Exports & Imports of Goods & Services Exports of goods and services were 9% below a year ago in the second quarter of 1954, reflecting largely a sharp decline in the volume of wheat sold abroad and also, in part, a lower level of business activity in the United States.

Imports of goods and services (on the national accounts basis) were down from the second quarter of last year, with declines fairly widespread throughout the various commodity groups. The decline reflects, to some extent, reduced levels of activity in certain industries such as durable goods manufacturing and textiles, a lower rate of business inventory accumulation compared with a year ago, and possibly the effects of a shift in the composition of total output from goods producing industries to the service industries. These developments together with the various transactions on non-merchandise account resulted in a further deficit on current account in the second quarter of 1954.

Personal Income & Expenditure Personal income in the second quarter of 1954 was 4% over the corresponding period of a year ago, despite the relative stability of production. Higher labour income, government transfer payments, and interest, dividends and net rental income of persons accounted for the major share of this increase; net income received by farm operators was also up. As was noted previously, the increase in labour is attributable to the rise in average hourly earnings over a year ago; higher unemployment insurance benefits account for the major part of the gain in government transfer payments, and an increase in bank deposit interest and in rents for the gain in interest, dividends and net rental income of persons.

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With personal direct taxes at a level approximately 7% below a year ago (reflecting the reduction in income tax rates effective July 1, 1953), personal disposable income was 5.4% higher in the second quarter of 1954. Personal expenditure on consumer goods and services showed an increase of 3% over last year, leaving personal saving at a level somewhat higher than a year ago.

At seasonally adjusted annual rates, personal saving amounted to \$1,204 million in the second quarter of 1954, or 7.2% of personal disposable income. Thus personal saving showed little change from the first quarter of 1954, both as to level and as a proportion of personal disposable income. (9)

## PRICES

Farm Prices Down Slightly in July A decline in livestock prices outweighed increases in dairy products, potatoes, poultry and eggs to cause a slight reduction in the index of farm prices of agricultural products to 234.5 in July from 234.9 in June. The index is on the base of 1935-39 prices equalling 100.

Provincial indexes decreased in the Prairie Provinces but increased in British Columbia and east of Manitoba. In Prince Edward Island the index rose to 184.5 in July from 184.1 in June, in Nova Scotia to 244.1, in New Brunswick to 210.3 from 207.0, in Quebec to 269.7 from 269.3, in Ontario to 260.0 from 256.0, and in British Columbia to 253.2 from 252.4. The index in Manitoba declined to 220.5 from 221.1, in Saskatchewan to 196.1 from 198.9, and in Alberta to 221.6 from 227.3. (10)

### Security Price Indexes

	<u>September 9</u>	<u>September 2</u> (1935-39 = 100)	<u>August 12</u>
<u>Investors' Price Index</u>			
Total Common Stocks .....	187.6	187.6	186.6
Industrials .....	189.2	189.4	187.1
Utilities .....	169.1	167.7	170.2
Banks .....	214.4	216.0	219.2

### Mining Stock Price Index

Total Mining Stocks .....	96.6	95.5	96.4
Gold .....	68.8	68.4	68.5
Base Metals .....	160.4	157.7	160.2

Consumer Price Indexes Advance In Nine Cities Nine of the ten regional consumer price indexes moved higher between July 2 and August 2, while the index for Montreal remained unchanged. Food indexes were substantially higher in all cities except Montreal, mainly reflecting seasonal increases for a number of items, particularly potatoes. Rent advances ranging from 0.1 to 0.5% were recorded in eight cities, while in two there was no change. Clothing indexes were unchanged in seven cities, lower in two and higher in one, as only scattered changes were reported in this group.

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Mixed price movements, principally in electrical appliances and hardware, combined with a few changes in fuel prices resulted in no over-all change in the household operation indexes for four cities while in the remaining six cities, three were higher and three lower. In other commodities and services, principal changes were decreases in gasoline price in five eastern cities, increases in hospital service rates in St. John's, Montreal and Toronto and higher newspaper rates in Ottawa.

Total indexes for August 2 and July 2 and August 2 group index detail are shown below. These indexes show changes in retail prices of goods and services in each city, but 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 - August 2, 1954				
	July 2 Aug. 2						
	1954	1954			Household	Other	
			Food	Shelter	Clothing	Operation	Commodities and Services
St. John's*	102.6	104.4	105.0	107.4	102.1	103.7	103.5
Halifax	113.8	115.3	110.5	122.9	115.9	119.0	116.0
Saint John	116.2	117.6	113.8	121.6	118.5	116.5	122.9
Montreal	117.2	117.2	114.8	133.6	110.2	116.0	116.8
Ottawa	116.4	117.0	113.1	129.0	113.1	115.9	118.8
Winnipeg	115.5	116.4	114.7	123.7	115.1	113.4	117.3
Saskatoon-Regina	114.1	115.3	114.3	114.3	116.6	118.5	112.8
Edmonton-Calgary	114.8	115.4	112.8	119.4	113.8	115.8	118.2
Vancouver	117.0	118.1	113.6	125.5	113.3	125.4	118.8
Toronto	118.8	119.0	112.8	141.6	111.4	116.5	119.0

\* Index on the base June 1951 = 100.

## MANUFACTURING

Output Of Steel Ingots Production of steel ingots in July dropped 19% to 255,328 tons from 315,203 in the same month last year, and Dropped By 19% In July the January-July output fell 24% to 1,810,425 tons from 2,381,481. On a daily basis July's production worked out at 8,236 tons as compared with 10,168 a year ago, and the 7-month average was 8,540 as compared with 11,233. (11)

Manufacturers Used Less Rubber In July Canadian manufacturers used 17,160,466 pounds of rubber in July, 4,552,218 less than in the preceding month. Consumption of all kinds was down, natural by, 1,989,789 pounds to 8,290,628 synthetic by 1,822,487 pounds to 6,179,362, and reclaim by 739,933 pounds to 2,690,476.

Manufacturers of tires, tubes and tire repair materials used 11,696,920 pounds, 2,514,439 less than in June, and manufacturers of footwear 1,626,782 pounds a decrease of 689,763. Wire and cable factories used 395,887 pounds, 213,464 less, while 3,440,877 pounds were used in other products, a drop of 1,134,552. (12)

MORE

Leather Footwear Production Declined 7% In First Half

Production of leather footwear in this year's first-half declined 7% to 19,563,922 pairs from 21,123,681 in the same 1953 period. June's output fell to 3,167,597 pairs from 3,203,059 a year ago.

In the half-year, production of women's and growing girls' leather footwear totalled 9,737,752 pairs (10,514,975 a year ago); men's, 4,069,513 (4,651,020); misses', 2,001,543 (1,908,465); children's and little gents', 1,563,360 (1,589,570); babies' and infants', 1,379,530 (1,593,337); boys', 647,039 (691,964); and youths', 165,185 (174,350). (13)

Production, Shipments Of Iron Castings, Cast Iron Pipe Lower In Half-Year Period

Smaller quantities of iron castings and cast iron pipes and fittings were produced in the first half of this year than in the same 1953 period. The total was 390,000 tons, down 10% from last year's 433,500 tons.

Shipments fell 11% to 254,000 tons from 285,100. The half-year consumption of pig iron was cut to 137,100 tons from 183,800, but scrap iron and steel rose to 333,100 tons from 300,600. (14)

Production Of Sawn Lumber Declined In First Half

Production of sawn lumber in Canada during the first six months this year was lower than in the first half of 1953. British Columbia's output fell 4% and in the rest of Canada production was off 19%.

The half-year's output of sawn lumber and ties in British Columbia totalled 1,899,327,000 feet board measure as compared with 1,986,227,000. June's production amounted to 390,982,000 board feet as compared with 344,926,000. East of the Rockies the six-month output totalled 1,430,580,000 board feet as compared with 1,758,416,000 in the same period last year. In June 365,119,000 board feet were produced as compared with 448,696,000.

The only increase in production in the half-year period occurred in Saskatchewan where it rose to 62,265,000 board feet from 52,772,000. Quebec's output fell to 504,475,000 board feet from 609,365,000, Ontario's to 282,272,000 from 352,063,000, Alberta's to 262,874,000 from 291,437,000, Nova Scotia's to 150,839,000 from 182,144,000, New Brunswick's to 137,873,000 from 231,132,000, Manitoba's to 26,021,000 from 34,198,000, and Prince Edward Island's to 3,961,000 from 5,305,000. (15 & 16)

More TV Sets, Fewer Radios Sold In May And Five Months

Canadian manufacturers sold more TV sets but fewer radios in May and the first five months this year. TV sales were up 11% in the month and 37% in January-May, while radio sales were down 34% in May and 23% in the five months.

Television set sales in May totalled 21,392 as compared with 19,231 a year ago, bringing January-May sales to 158,115 sets as compared with 115,249. May's radio sales numbered 33,291 units as compared with 50,546, and five-month sales aggregated 185,994 units as compared with 253,898. (17)

MORE



Motor Vehicle Shipments Down 46%  
As Sales Slump Increased In July

Canada's motor vehicle industry cut July shipments 46% this year as the drop in dealer sales increased. Shipments have been falling below last year's record level at a steadily rising rate since February, and in July fell to 26,128 from 48,691, the sharpest drop to date. Dealer sales, which have been down since the start of the year, fell over 21% in July to 33,677 from 42,801, also the biggest cut so far. Retail value was off almost one-fifth to \$85,797,000 from \$106,789,000.

The tally for the first seven months of 1954 showed shipments down 19% to 269,475 from 332,389, and dealer sales down about 18% to 261,576 from 317,461. The decline in retail value was not quite as great, amounting to slightly more than 15% to \$673,579,000 from \$795,131,000. Imported United States and European motor vehicles have also moved more slowly this year. Shipments of U.S. vehicles were off to 1,383 from 2,943 in July and 16,501 from 21,446 in the first seven months. Sales of European vehicles were down to 2,531 from 3,407 in July and to 14,869 from 19,737 in the seven months.

The drop in shipments of Canadian-made vehicles in July and the first seven months was common to both passenger cars and commercial vehicles, but the latter showed by far the sharpest reduction. Factories shipped only 4,945 commercial vehicles in July, less than one-half the 11,226 shipped a year earlier, and January-July shipments totalled only 53,001 as against 88,422. Shipments of passenger cars fell to 21,183 from 37,465 in July, and to 216,474 from 243,967 in the first seven months. The only exceptions to this year's downward trend have been convertible cars and chassis. There were 12,814 convertibles shipped in the first seven months of 1954 as compared with only 1,628 last year, while shipments of chassis rose to 10,993 from 7,972.

The increased down-trend in dealer sales in July was common to both passenger cars and commercial vehicles. Car sales were off over 19% to 27,973 from 34,594, and the retail value nearly 17% to \$71,360,000 from \$85,738,000. Sales of commercial vehicles fell 30.5% to 5,704 from 8,207, and the retail value more than 31% to \$14,437,000 from \$21,051,000. In the first seven months passenger car sales were off over 14% to 213,576 from 249,154 and the retail value more than 12% to \$548,895,000 from \$625,528,000. January-July sales of commercial vehicles were nearly 30% lower this year at 48,000 versus 68,307 and the retail value was down 26.5% to \$124,684,000 from \$169,603,000.

The lower sales were reflected in financing figures. The number of new motor vehicle sales financed in July was down over 18% to 15,186 from 18,609 a year earlier, and the amount of financing was 13.5% lower at \$29,184,000 versus \$33,725,000. In the first seven months 100,140 new vehicles were financed, over 17% less than the 120,887 financed in January-July last year, and the amount of financing was down over 13% to \$188,489,000 from \$216,878,000. Figures on the financing of sales of used motor vehicles show a drop of 12.5% in July to 41,331 from 47,248 in the same month of 1953, with the amount of financing more than 14% lower at \$34,015,000 versus \$39,681,000. In the first seven months this year 239,820 used vehicles were financed, nearly 17% fewer than the 287,623 financed last year, and the amount of financing was over 18% lower at \$201,651,000 versus \$246,742,000. (18 & 19)

Shipments of Primary Iron  
And Steel Lower In May

Shipments of primary shapes by Canadian steel mills, exclusive of producers' interchange in May totalled 217,051 tons as compared with 287,200 in the corresponding month last year, bringing cumulative shipments for the January-May period to 1,107,063 tons as compared with 1,393,424. Producers interchanged 109,792 tons in May (130,948 a year ago), and 504,503 tons in the five months (608,895). (20)

Increase In Incorporated Firms  
In Manufacturing Since The War

The proportion of incorporated companies in the manufacturing industries has increased at expense of individually owned concerns, partnerships and cooperatives since the war, according to the latest report on the type of ownership of Canada's manufacturing industries. Incorporated companies included 36.9% of all manufacturing firms in 1952 as compared with 33.4% in 1946, while individually owned concerns included 44.9 as against 47.3%, partnerships 15.4 as against 16%, and cooperatives 2.8 as against 3.3%.

Type of ownership varies widely among the different manufacturing industries, as well as among firms of different sizes. In 1952 the proportion of individually owned establishments was highest at 62% in the wood products group, where the average number of employees per firm was lowest at 10.4. The petroleum and coal products group, with an average of 167.4 employees per establishment, had the smallest proportion of individually owned concerns (3%). In the rubber products group, with the highest average number of employees (308.3), only 10% of the establishments were individually owned. The proportion of partnership establishments was highest in the wood products group at 19.7% and in the textile and fur clothing group at 19.3%. The petroleum and coal products group had the highest proportion of incorporated companies (93%), and the foods and beverages group the highest proportion of cooperatives (11.5%).

Despite the increase in the incorporated companies in recent years, the bulk of the manufacturing establishments in Newfoundland (51.2%), Prince Edward Island (47.5%), Nova Scotia (54.1%), New Brunswick (54%), Quebec (49.8%), Saskatchewan (57.7%), Alberta (51.7%), and the Yukon and Northwest Territories (47.8%) were individually owned in 1952. Incorporated companies formed the largest group in Ontario (43.1%), Manitoba (42%), and British Columbia (41.9%). The proportion of partnership concerns ranged from 8.7% in the Yukon and Northwest Territories and 11.2% in Quebec to 34.1% in Newfoundland. Prince Edward Island had the highest proportion of cooperatives (7.7%), followed by Saskatchewan (5.1%), while the proportion was only 0.2% in Newfoundland and nil in the Territories.

Although individually owned establishments predominated in all but three provinces, most of the employees in manufacturing in all areas worked for incorporated companies. Incorporated companies included 89.6% of all the manufacturing employees in Canada, provincial proportion ranging from 64% in Prince Edward Island to 92.6% in Ontario. Individually owned concerns accounted for 5.9% of the total, provincial proportion ranging from 4% in Ontario to 19.6% in Prince Edward Island. Partnerships employed 3.6% of the total, the range being from 3% in Ontario to 11.5% in Prince Edward Island. Cooperatives accounted for only 0.9% of the employees, Saskatchewan showing the highest proportion of 10.6%. (21)



Close To Four Times As Many Killed By Cancer  
As By All Other Notifiable Diseases Combined

Cancer killed nearly four times as many Canadians in 1952 as all other notifiable

diseases combined, the Bureau reveals in a special report. The 17,710 cancer deaths contrasted with 4,775 caused by tuberculosis, polio and 39 other diseases ranging from actinomycosis to whooping cough. However, the 22,485 total for the 42 diseases -- mostly communicable -- which physicians were required to report in 1952 was over 1% fewer than the 22,776 deaths caused by the 27 diseases listed 28 years earlier, in spite of nearly three-fifths in the population.

Since 1924 vaccines and other preventive measures, new drugs and improved treatment methods have sharply reduced the death toll from many diseases, including such once-formidable destroyers as diphtheria, small-pox and typhoid fever. Indeed, only six of the 27 diseases reportable in both years killed more people in 1952 than in 1924, and only one of these -- cancer -- showed a distinct upward trend in deaths over the 28 years. Deaths attributed to cancer numbered 7,094 in 1924, less than half the all-time high of the latest year, and represented only a little more than 31% of the deaths from notifiable diseases as compared with almost 79% of the total in 1952. The increase has been partly the result of more accurate diagnosis of the disease.

Tuberculosis outstripped cancer as a killer in 1924, causing 7,675 deaths. Since the 1930 peak of 8,075, however, T.B. deaths have been gradually decreasing and the 1952 total of 2,457 was the lowest on record -- although this was still well above the figure for any other notifiable disease except cancer. Lending emphasis to the decline in T.B. deaths is the fact that nearly three times as many cases of tuberculosis were reported in 1952 as in 1924. The 1952 total, moreover, was the smallest since 1941 and about a third less than the record 15,292 cases reported in 1944. In the 29 years 1924-52 tuberculosis killed 179,920 Canadians, while cancer struck down 354,355 or close to twice as many.

Third deadliest notifiable disease in both 1924 and 1952 was epidemic influenza, but the 864 deaths it caused in the latter year were less than half the 1,927 recorded in 1924 and only slightly more than an eighth of the all-time high of 7,170 in 1929. In contrast, nearly 10 times as many cases were reported in 1952 as in 1924, although only about one-eighth as many as the record 64,429 of 1937.

With both cases and deaths at new crests, polio placed fourth on the death list in 1952, a sharp change since 1924 when it ranked 14th. Physicians reported 4,755 cases of epidemic poliomyelitis, over a fifth more than in 1937, the previous peak year, and more than 30 times as many as in 1924. Deaths numbered 311, about 41% more than in the previous high year of 1931 and close to three times as many as in 1924.

Venereal diseases brought death to only slightly fewer than did polio in 1952, but the 300 total was less than a third of the record 966 of war-time 1942 and 61% under the 1924 total of 763. Prior to 1944 reporting of cases of venereal diseases was incomplete, but since the all-time peak of 41,556 in 1946 the number has dropped by almost 54%.

MORE

Measles followed venereal diseases on the death roll in 1952, killing 236, about one-third as many as in 1924 and considerably less than the 1926 peak of 892. About 43% more cases were reported in 1952 than in 1924, but the total was over 32% short of the 1935 peak of 83,127. Rubella or German measles caused two deaths as compared with none in 1924 and a record 30 in 1936, reported cases being almost 12 times as numerous as in 1924 but only about one-seventh as numerous as the 1936 peak of 69,401.

Seventh deadliest was whooping cough, which brought death to 142, a great improvement over 1924 when this disease ranked fifth with 1,019 deaths (the high was 1,242 in 1926). About a third more cases were reported in 1952 than in 1924, but only about half as many as 1940's record 19,878.

Infectious hepatitis (jaundice) followed with 91 deaths in 1952, the highest figure on record. This compares with only 9 deaths in 1941, the first year for which this statistic is available. Reported cases numbered 1,182, well over the previous peak of 722 in 1938.

Meningococcal meningitis ranked ninth with 87 deaths, less than half the 184 of 1924 and about one-fourth the 1929 peak of 341. There were nearly twice as many cases as in 1924, but less than one-fifth the record 1,465 of 1941.

Puerperal septicaemia (infection following childbirth) was in tenth position, although fewer cases were reported in 1952 than in 1924 and deaths were off sharply to 75 from 367 (the all-time high was 501 in 1930).

Dropped from the 1924 top 10 were diphtheria, typhoid fever and scarlet fever. Diphtheria ranked fourth in 1924 with 1,281 deaths, but in 1952 was 12th with only 26. Only 190 cases were reported in 1952, the smallest number on record and a sharp drop from the 1924 peak of 9,057. There were more cases of scarlet fever in 1952 than in 1924 (19,010 versus 17,187) the peak was 21,226 in 1936, but deaths were off sharply to 24 from the 1924 peak of 509, this disease ranking 14th in the latest year as compared with ninth in 1924. Cases of typhoid fever were about one-fourth as numerous in 1952 as in 1924 and only one-sixteenth of the record 8,113 in 1927. This disease ranked eighth in 1924 with 580 deaths, but in 1952 was in 15th place with only 18.

Deaths from erysipelas (a skin disease) were also greatly reduced in the 28 years, to five in 1952 from 223 in 1924. Deaths from infectious encephalitis (sleeping sickness) fell to 20 from 88, deaths from smallpox to none from 64 (no cases of this disease have been reported since 1946 and no deaths since 1939).

Other notifiable diseases causing fewer deaths in 1952 than in 1924 were dysentery (50 as against 119), mumps (9 as against 24) and anthrax or wool-sorter's disease (none as against 2). Among the diseases causing more deaths in the latest year were chickenpox (25 as against 16), typhus fever (1 as against none) and undulant fever (4 as against none), but in each case the 1952 deaths were well below the peak years for these diseases.

Among diseases reported separately since 1941, streptococcal sore throat caused 17 deaths in 1952 versus the 1941 peak of 81. (22)



Crude Petroleum Output  
Up 26.5% In First Half

Canada's output of crude petroleum in the first half of 1954 climbed to a new peak total of 42,233,000 barrels. This was 26.5% above the preceding year's 33,391,000 barrels. Production reached 7,870,000 barrels in June, up from 7,161,000 in May and 6,809,000 a year ago. Alberta accounted for 39,021,000 barrels of the half-year output (31,722,000 a year ago). Saskatchewan was the next largest source with 2,018,000 barrels (1,199,000), followed by Manitoba with 787,000 barrels (196,000), Northwest Territories 204,000 barrels (158,000), Ontario 197,000 barrels (110,000), and New Brunswick 6,400 barrels (7,600).

First-half output of natural gas increased to 65,107,621,000 cubic feet from 52,376,435,000 a year earlier. June's production amounted to 7,505,401,000 cubic feet, down from 8,458,327,000 in May, but up from 6,019,847,000 in June last year. (23)

Gold Production 5%  
Lower In Half-Year

Gold production in the first half of 1954 totalled 2,092,086 fine ounces, 5% below last year's corresponding output of 2,204,037 fine ounces. Small gains in May and June were more than counterbalanced by declines in the January-April period. June's output amounted to 377,347 fine ounces as compared with 383,615 in May and 362,321 in June last year.

Production in Ontario in half-year period totalled 1,156,280 fine ounces (1,228,813 a year ago); Quebec, 522,002 (574,642); Northwest Territories, 148,544 (141,644); British Columbia, 137,061 (133,490); Prairie Provinces, 118,170 (112,177); Newfoundland and Nova Scotia, 5,386 (5,721); and Yukon, 4,625 (7,542). (24)

## EMPLOYMENT & EARNINGS

Claims For Unemployment Insurance Benefit  
In July Down From June, Up From Last Year

Fewer initial and renewal claims for unemployment insurance benefit were filed in July than in the preceding month but there was a rise over a year earlier. Claims filed this July totalled 106,269 as compared with 114,797 in June and 75,869 in July 1953.

Ordinary claimants on the live unemployment register at the end of July numbered 188,913 as compared with 199,531 a month earlier and 110,938 a year ago. New beneficiaries during July numbered 71,203, compared with 81,942 in June and 49,164 in July last year. During July \$12,760,098 was paid in compensation for 4,157,128 days (including 76,310 disability days), in comparison with \$15,702,229 and 5,050,883 days (including 81,681 disability days) during June and \$7,148,024 and 2,383,416 days in July 1953.

Initial and renewal claims filed in local offices in the provinces follow: Newfoundland, 1,420 (1,764 in July, 1953); Prince Edward Island, 276 (275); Nova Scotia, 5,186 (4,208); New Brunswick, 2,676 (3,093); Quebec, 33,756 (28,832); Ontario, 45,513 (23,626); Manitoba, 2,810 (1,975); Saskatchewan, 988 (564); Alberta, 3,901 (1,811); and British Columbia, 9,743 (9,721). (25)

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Weekly Wages In Manufacturing Slightly Higher At July First

Weekly earnings in manufacturing at the beginning of July averaged \$57.39, up from \$56.60 a month earlier, according to advance figures. The work-week averaged 40.5 hours as compared with 39.8, and hourly earnings averaged 141.7 cents as compared with 142.2.

The drop in average hourly earnings was largely due to changes in the industrial distribution of workers, with increased employment of casual help in food and beverages due to seasonal factors, and reduced activity in the transportation equipment industry. The longer working week recorded at July 1 was largely a return to more normal hours after the survey week of June 1 which included Victoria Day.

The average hourly and weekly earnings were lower in most branches of the mining industry. Employment and hours worked increased substantially in both branches of construction. The opening of summer hotels furnished seasonal employment for lower-paid workers in the service group and the average hourly earnings fell by 1.2 cents to 80.5 cents at July 1.

Average Hours, Earnings & Wages of Hourly-Rated Wage-Earners

Industry	Hours Per Week			Hourly Earnings			Weekly Wages		
	July 1 1953	June 1 1954	July 1 1954	July 1 1953	June 1 1954	July 1 1954	July 1 1953	June 1 1954	July 1 1954
	no.	no.	no.	¢	¢	¢	\$	\$	\$
Manufacturing	41.3	39.8	40.5	136.2	142.2	141.7	56.25	56.60	57.39
Durable Goods	41.9	40.0	40.9	147.0	152.1	151.6	61.59	60.84	62.00
Non-durable Goods	40.8	39.6	40.1	123.5	131.4	130.9	50.39	52.03	52.49
Mining	42.9	42.7	42.8	153.0	157.0	156.0	65.64	67.04	66.77
Electric and Motor									
Transportation	45.4	44.9	45.1	135.8	139.0	140.5	61.65	62.41	63.37
Construction	42.4	38.7	40.9	141.9	148.6	147.6	60.17	57.51	60.37
Service	42.2	40.6	41.2	77.7	83.1	81.9	32.79	33.74	33.74

## FOOD &amp; AGRICULTURE

Creamery Butter Stocks Larger On September 1, Cheese Lower

Cold storage stocks of creamery butter were 16.8% larger this September 1 than at the same time last year but cheddar cheese stocks were down 1.5%. Holdings of evaporated whole milk fell 6.2% but skim milk powder rose 2%. Poultry meat stocks increased 4.6% and eggs in cold storage advanced 18%.

Creamery butter stocks on September 1 totalled 105,834,000 pounds (89,-072,000 last year); cheddar cheese, 44,132,000 pounds (45,649,000); evaporated whole milk, 66,647,000 pounds (72,847,000); skim milk powder, 18,269,000 pounds (16,264,000); ice cream, 1,228,000 gallons (1,019,000); cold storage eggs, 393,000 cases (332,000); and poultry meat, 12,889,000 pounds (8,266,000). (26)

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Production of Creamery Butter,  
Cheddar Cheese Upped In August

Larger quantities of creamery butter, cheddar cheese and concentrated whole milk products were made in August and the first 8 months this year than in 1953, while there was practically no change in ice cream and concentrated milk by-products. Domestic disappearance of creamery butter rose both in the month and cumulative period.

Creamery butter production in August rose to 38,781,000 pounds from 37,409,000, and the domestic disappearance advanced to 25,838,000 pounds from 25,641,000. January-August production was up 3% to 222,357,000 pounds from 215,728,000, and the domestic disappearance rose 4% to 187,617,000 pounds from 180,886,000. August's output of cheddar cheese was 20% higher this year at 11,800,000 pounds as compared with 9,802,000, and 8-month production was 8% higher at 57,918,000 pounds as compared with 53,512,000.

Ice cream production in August amounted to 3,708,000 gallons as compared with 3,717,000, bringing the January-August total to 21,185,000 gallons as compared with 21,246,000. The month's domestic disappearance totalled 3,760,000 gallons as compared with 3,870,000, and the January-August total was 20,776,000 gallons as compared with 20,937,000.

Production of concentrated milk products in August rose 1% to 48,669,000 pounds from 47,981,000, and the January-August output advanced 2% to 329,930,000 pounds from 322,920,000. The month's output of whole milk products increased to 35,211,000 pounds from 34,564,000, and the 8-month production rose to 244,091,000 pounds from 237,293,000. Milk by-products were little changed at 13,458,000 pounds in August and 85,839,000 in the 8 months. (27)

Production & Stocks  
Of Process Cheese

Production of process cheese in August amounted to 3,578,000 pounds, and increase of 5% over July's revised 3,423,000 pounds but a decrease of 1% from last year's August output of 3,602,000. This brought the cumulative output for the January-August period to 29,021,000 pounds, up 4% from 27,926,000 a year ago. Stocks held by manufacturers at the end of August totalled 1,448,000 pounds as compared with 1,271,000 a month earlier and 1,006,000 at the same time last year.

Margarine Production  
Increased In August

Continuing the increases common to all months since February last, production of margarine rose 15% in August to 8,293,000 pounds from 7,207,000 a year earlier. The January-August output increased 5% to 72,591,000 pounds from 68,888,000. September 1 stocks held by manufacturers, wholesalers and other warehouses declined to 2,351,000 pounds from 3,207,000 on August 1 and 2,794,000 at the same time last year. (28)

Frozen Fruit, Vegetable  
Stocks Up On September 1

Larger quantities of fruit, frozen and in preservatives, and vegetables, frozen and in brine, were in store on September 1. Fruit stocks amounted to 35,916,000 pounds as compared with 30,730,000 a month earlier and 30,142,000 last year. Vegetable stocks were 22,820,000 pounds as compared with 16,137,000 at the beginning of August and 18,978,000 at the same date in 1953. (29)

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Visible Supplies Of Wheat Stocks of Canadian wheat in store or in transit in North America on August 25 amounted to 370,011,000 bushels, slightly under the 375,119,000 held a week earlier but 27% above last year's 291,525,000 bushels. Overseas export clearances during the week ending August 25 fell to 4,143,000 bushels from 6,487,000 last year, and cumulative clearances from the start of the crop year dropped to 13,692,000 bushels from 20,751,000. (30)

Wheat Supplies And Exports Of Four Major Exporting Countries Supplies of wheat remaining on or about August 1 in the four major wheat exporting countries for export and carryover at the end of their respective crop years totalled 1,993,400,000 bushels, some 23% greater than the 1,620,400,000 a year ago.

Estimated supplies in each of the four countries on August 1 with a year earlier figures in brackets were as follows: United States, 1,201,000,000 (1,087,900,000); Canada, 587,500,000 bushels (369,200,000); Australia, 121,300,000 bushels (61,400,000); and Argentina, 83,600,000 bushels (101,900,000). The United States 1954 crop, estimated at 977,500,000 bushels, is included in these calculations.

Total exports of wheat and wheat flour from these four countries for the period August 1953 to July 1954 (the Canadian crop year) amounted to 639,800,000 bushels, some 25.1% below the preceding year's 854,200,000. Exports from Canada decreased to 255,100,000 bushels from 385,500,000, the United States to 210,700,000 bushels from 322,600,000, and Australia to 63,600,000 bushels from 107,000,000. Argentina's exports rose to 110,300,000 bushels from 38,900,000.

Exports from Canada in the 12-month period were down 34%, United States 35%, and Australia 41%. Reduced shipments from these three countries were only partially offset by the sharp increase (184%) in Argentine exports from the preceding year's low level. Canada's share of the total exports from the four countries had decreased about 5% between the two crop years, shipments during 1952-53 having accounted for 45.1% of the total and 39.9% during 1953-54. The United States' share of the total dropped from 37.8% to 32.9%, and Australia's share declined from 12.5% to 9.9%. Reflecting the improved supply position, Argentina's share of the four countries' exports was 17.2% as compared with 4.6%.

Preliminary estimates place total world exports of wheat and wheat products at some 840,000,000 bushels for the United States crop year (July, 1953 -- June, 1954). For the same period shipments from the four principal exporting countries amounted to about 675,000,000 bushels or over 80% of the total. In the preceding crop year world wheat exports were estimated at 987,000,000 bushels with the "Big Four" accounting for some 833,000,000, more than 84% of the total.

The decline of some 4% in the proportion of the world wheat market shared by the four major exporters appears to be largely attributable to increased exports from countries such as Turkey, France and Sweden which had exceptionally good harvests last season. It is the view of the United States Department of Agriculture that in 1954-55 world wheat trade may remain at about the same level as in 1953-54 -- some 840,000,000 bushels. (31)



September Forecast Of Production  
Of Principal Field Crops In 1954

On the basis of yields indicated at September 1, production of most of Canada's principal field crops will be substantially below that of 1953. Moreover, an unprecedented combination of losses from rust, excessive moisture, sawflies, wind and hail in the Prairie Provinces has sharply reduced the current outlook for both yield and quality from the August 1 forecast level for most major grain crops, particularly wheat. However, prospective yields per acre for 1954 for all crops except spring wheat and fodder corn are still above the long-time (1908-50) average.

Although indicated average yields and production of winter wheat, mixed grains and tame hay are somewhat above the levels forecast on the basis of August 1 conditions, those of spring wheat, oats for grain, barley, fall rye, spring rye, and potatoes vary from much lower to relatively unchanged.

With the exception of southern areas, very little harvesting had been accomplished in the Prairie Provinces by September 1. Frequent rains during the past six weeks have seriously delayed ripening of grains and have hampered harvesting operations even in areas where crops matured at an earlier date. Harvesting is not yet general in many central and northern districts, and an extended period of dry, frost-free weather will be required to ensure realization of current estimates. In addition, it will not be possible to determine until completion of harvest the exact extent of damage resulting from what is considered to be perhaps the worst rust epidemic in Canada's history.

While indicated yields per acre of 16 of the 18 crops above the long-time averages, yields per acre of only soybeans and tame hay are above those of 1953. Indicated production for six crops -- mixed grains, dry beans, flaxseed, soybeans, tame hay and sugar beets -- exceeds that of last year but anticipated outturns of all other crops fall below those of 1953.

Canada's wheat crop, now forecast at 377,900,000 bushels is far below both the 1953 crop of 614,000,000 bushels and the ten-year (1944-53) average of 465,500,000. The sharp reduction of 135,100,000 bushels (26%) from the August 1 forecast is largely attributable to the rust epidemic which developed in alarming proportions, particularly in Saskatchewan and Manitoba, as the season progressed. However, excessive moisture, sawflies, wind and hail also have taken considerable toll of crops since August 1. As much of the crop is still immature and remains to be harvested, optimum weather conditions must prevail for the next few weeks if even the current reduced forecast is to be fully realized.

The indicated decline in production of the 1954 wheat crop from last year's level results from decreases in both seeded acreages and average yields per acre. This year's crop of spring wheat, forecast at 353,900,000 bushels, is being harvested from a seeded area estimated at 23,600,000 acres yielding an indicated 15.0 bushels per acre. In 1953 the spring wheat crop was estimated at 587,800,000 bushels, the second largest on record, yielding an average of 23.7 bushels per acre on a seeded area of 24,800,000 acres. Ontario's winter wheat crop is now forecast at 23,900,000 bushels, a decrease of 2,300,000 from the 1953 outturn as a result of declines in average yield from 35.8 to 33.7 bushels per acre and in the seeded area from 732,000 to 710,000 acres.

MORE

In the Prairie Provinces the wheat crop is now forecast at 351,000,000 bushels as against last year's next-to-record 584,000,000. The expected average yield per seeded acre in the Prairie Provinces is 15.0 bushels, with Manitoba averaging 13.8; Saskatchewan 13.5; and Alberta 19.3 bushels per acre. Production in Manitoba is now placed at 28,000,000 bushels, down 12,000,000 bushels from the August forecast and 18,000,000 less than in 1953. The indicated production in Saskatchewan is placed at 210,000,000, a decline of 115,000,000 from the earlier estimate and 165,000,000 below the 1953 crop. Alberta's wheat outturn is now forecast at 113,000,000, down 9,000,000 from the August 1 forecast and 50,000,000 from the 1953 level. Relatively small quantities of winter wheat are included in the spring wheat estimates for all provinces other than Ontario.

Production of oats for grain in 1954 is forecast at 365,400,000 bushels, the smallest crop since 1949 and a decrease of 10% from last year's 407,000,000. Average production during 1944-53 was 399,000,000 bushels. Although the seeded area increased from 9,800,000 acres in 1953 to 10,200,000 in 1954, lower indicated average yields in all provinces more than offset the effect of increased acreage. The 1954 barley crop, seeded on an area estimated at 7,900,000 acres is forecast at 211,600,000 bushels, the smallest outturn since 1950 and about 19% below last year's crop of 262,100,000, but above the ten-year average of 188,800,000. The decline from 1953 is jointly attributable to a 12% decrease in acreage from last year's level of 8,900,000 acres and to lower anticipated average yields in all provinces. Sharp decreases in the area seeded to both fall and spring rye, combined with lower yields in all provinces, have resulted in a 1954 rye crop sharply reduced from the 1953 level. The 1954 crop is forecast at 14,800,000 bushels as against 28,800,000 last year and the ten-year average of 15,600,000.

This year's flaxseed crop, currently forecast at 12,200,000 bushels (virtually unchanged from the August forecast), is about 23% higher than last year's 9,900,000 and nearly 32% greater than the ten-year average outturn of 9,300,000. The anticipated larger crop in 1954 is almost entirely attributable to increased seeded acreage, as expected average yields in most producing provinces are not greatly different from those received in 1953. The crop of mixed grains, grown chiefly in Eastern Canada, is forecast at 67,000,000 bushels, compared with 62,200,000 in 1953 and the ten-year average of 57,800,000. Increased acreage is responsible for the greater production this year since prospective average yields are lower than in 1953 for all provinces except Alberta where no change is indicated.

Production of dry peas is placed at 879,000 bushels, well below 1953's 1,210,000 and the ten-year average of 1,282,000. The dry bean crop is forecast at 1,274,000 bushels as compared with 1,219,500 in 1953 and the ten-year average of 1,425,000. Production of shelled corn (mainly in Ontario) is forecast at 19,800,000 bushels, 1,000,000 below last year's crop but well above the ten-year average of 13,600,000. The 1954 potato crop is forecast at 54,300,000 bushels, down 19% from the 67,000,000-bushel crop of 1953. Seeded acreages and average yields per acre are down from 1953 in most provinces, with the greatest decrease in production (3,800,000 bushels) in New Brunswick. Potato crop prospects have declined considerably since August 1 in the Maritimes, improved in Quebec and Ontario and remained relatively unchanged in the West.

MORE



Production of tame hay, including clover and alfalfa, is currently placed at 20,400,000 tons, somewhat above both last year's 19,600,000 and the ten-year average of 18,400,000. With the major exception of southwestern Ontario where abnormally dry weather prevailed during the growing season, weather conditions favoured the growth of a heavy hay crop. However, unseasonable rains over many parts of the country unduly prolonged haying operations and caused considerable deterioration in quality. Output of sugar beets in the four beet-growing provinces is forecast at 945,000 tons, the fourth largest outturn on record, and compares with 900,000 in 1953 and the ten-year average of 802,000. As a result of continued expansion in acreage and satisfactory yields, soybean production (which is confined to Ontario) is estimated at 5,300,000 bushels, the only crop to establish a new production record this season. This compares with 4,400,000 bushels last year and the ten-year average of 2,400,000.

Estimated production of the principal grain crops in Canada in 1954, in thousands of bushels, with 1953 figures in brackets: wheat, 377,851 (613,962); oats for grain, 365,437 (406,960); barley, 211,605 (262,065); rye, 14,827 (28,775); mixed grains, 67,346 (62,158); corn for grain, 19,823 (20,854); buckwheat, 2,687 (3,210); dry peas, 879 (1,210); dry beans, 1,274 (1,219); flaxseed, 12,189 (9,912); soybeans, 5,334 (4,406). Average yields per acre, in bushels: wheat, 15.6 (24.1); oats for grain, 36.0 (41.4); barley, 26.9 (29.4); rye, 17.4 (19.3); mixed grains, 41.2 (43.0); corn for grain, 47.4 (57.6); buckwheat, 22.1 (23.1); dry peas, 17.6 (20.0); dry beans, 17.6 (17.8); flaxseed, 10.1 (10.2); and soybeans, 21.0 (20.4).

Indicated production of root and fodder crops in 1954, with 1953 figures in brackets: potatoes, 54,279,000 bushels (67,002,000); field roots, 419,000 tons (477,000); tame hay, 20,431,000 tons (19,650,000); fodder corn, 2,987,900 tons (3,564,000); sugar beets, 945,224 tons (900,339). Average yields per acre: potatoes, 183.3 bushels (208.7); field roots, 9.79 tons (11.04); tame hay, 1.89 tons (1.84); fodder corn, 8.40 tons (9.77); sugar beets, 10.44 tons (10.99).

Anticipated production of the five principal grain crops in the Prairie Provinces, in thousands of bushels, with 1953 figures in brackets: Manitoba - wheat, 28,000 (46,000); oats for grain, 41,000 (53,000); barley, 48,000 (61,000); rye, 1,480 (2,750); flaxseed, 4,200 (3,800); Saskatchewan - wheat, 210,000 (375,000); oats for grain, 102,000 (111,000); barley, 62,000 (82,000); rye, 7,000 (14,400); flaxseed, 5,300 (3,500); Alberta - wheat, 113,000 (163,000); oats for grain, 96,000 (112,000); barley, 92,000 (108,000); rye, 4,320 (9,700); flaxseed, 2,300 (2,000). (32)

**Farm Cash Income Was  
Reduced 7.5% In Half**

Farmers in nine Canadian provinces (Newfoundland excluded) took in an estimated \$1,093,900,000 from the sale of farm products and from participation payments on previous year's wheat crops in the first 6 months this year, 7.5% less than the \$1,182,600,000 collected in the first half of 1953 and nearly 12% under the all-time January-June peak of \$1,241,700,000 in 1951. About \$72,600,000 of the total decline of \$88,700,000 from the first-half of last year occurred in the second quarter of 1954.

MORE

Contributing to the reduced income in the first half of this year were substantial cuts in cash income from wheat, barley, barley participation payments, rye, corn, and potatoes. Wheat accounted for more of the decline than any other single commodity, much smaller marketings and lower prices reducing total receipts 45% to \$132,700,000 from \$242,900,000 in the first 6 months of 1953.

On the other hand, income from the sale of livestock and products increased. Larger marketings for all livestock more than offset lower prices for all classes except hogs to increase the total return 16% to \$368,500,000 from \$317,400,000 in the first-half of 1953. Income from cattle and calves rose about 7% to \$185,800,000, while income from hogs jumped nearly 27% to \$180,500,000.

Lower egg prices were more than offset by higher marketings and total cash income from the sale of eggs rose to \$62,300,000 from \$60,300,000. Farm income from dairy products totalled \$200,500,000, up from \$196,500,000 last year.

The Prairie Provinces and Prince Edward Island accounted for the entire reduction in farm cash income in the first 6 months this year, declines ranging from 6% in Prince Edward Island to 36% in Saskatchewan. Gains in the other provinces ranged from less than 1% in New Brunswick to about 9% in Quebec.

Farm cash income from the sale of farm products in the first-half of 1954 (in thousands of dollars), with 1953 figures in brackets: Prince Edward Island, \$11,218 (\$11,939); Nova Scotia, \$19,725 (\$18,284); New Brunswick, \$21,824 (\$21,673); Quebec, \$192,205 (\$176,063); Ontario, \$359,202 (\$335,140); Manitoba, \$67,360 (\$74,016); Saskatchewan, \$192,261 (\$300,343); Alberta, \$185,040 (\$203,582); British Columbia, \$45,039 (\$41,563). (33)

Less Meat In Storage On September 1 Stocks of meat held by packers, abattoirs, wholesale butchers and cold storage warehouses on September 1 dropped to 55,639,000 pounds from 68,062,000 a month earlier and 67,236,000 at the same time last year. Holdings of frozen meat were down to 26,308,000 pounds from 40,360,000 a year ago, but stocks of fresh meat rose to 17,021,000 pounds from 15,486,000, and cured meat to 12,310,000 pounds from 11,390,000. (34)

Less Bread Baked, But Value Climbed In 1953 Canadian bakers baked over 2% less bread last year than in 1952, but higher prices raised the total value by more than 3%, according to preliminary estimates by the Bureau. Bakeries in the 10 provinces and the territories turned out 1,487,144,559 pounds of bread in 1953, some 34,051,947 less than in the preceding year. Total value increased by \$5,202,499 to \$166,545,695. The value of cakes, doughnuts and other bakery products also increased last year, totalling \$106,765,199 as compared with \$98,838,214 in 1952.

The gross value of all bakery products was \$273,310,894, a gain of about 5% from \$260,181,410 in the preceding year. Bakery employees increased to 33,420 from 33,011, and their salaries and wages rose about 2% to \$79,465,679 from \$74,244,786. The cost of flour and other raw materials climbed to \$127,728,693 from \$122,229,789. Consumption of hard wheat or bread flour rose to 5,842,379 barrels from 5,590,856, and soft wheat or cake flour to 306,037 barrels from 292,862.



(Publications numbered similarly to reviews to indicate source of latter)

- 1- Travel Between Canada & the United States, July, 20¢
  - 2- Commercial Failures Under the Bankruptcy & Winding Up Acts,  
Second Quarter, 25¢
  - 3- M: Railway Carloadings, Period Ended August 31, 10¢
  - 4- Civil Aviation, April, 15¢
  - 5- Wholesale Trade, July, 10¢
  - 6- Chain Store Sales & Stocks, July, 10¢
  - 7- Monthly Summary of Foreign Trade, June, 10¢
  - 8- Imports for Consumption, Summary, June, 20¢
  - 9- National Accounts, Income & Expenditure, Second Quarter, 25¢
  - 10- M: Index Numbers of Farm Prices of Agricultural Products, July, 10¢
  - 11- Steel Ingots, July, 10¢
  - 12- Consumption, Production & Inventories of Rubber, July, 20¢
  - 13- M: Production of Leather Footwear, June, 10¢
  - 14- M: Iron Castings & Cast Iron Pipes & Fittings, June, 10¢
  - 15- Production, Shipments & Stocks of Sawmills in British Columbia, June, 25¢
  - 16- Production, Shipments & Stocks of Sawmills East of the Rockies, June, 25¢
  - 17- Radio & Television Receiving Sets, May, 10¢
  - 18- Motor Vehicle Shipments, July, 10¢
  - 19- New Motor Vehicle Sales & Motor Vehicle Financing, July, 20¢
  - 20- Primary Iron & Steel, May, 20¢
  - 21- M: Type of Ownership of Manufacturing Industries of Canada, 1952, 25¢
  - 22- R: Summary of Notifiable Diseases, 1924-52, 75¢
  - 23- M: Crude Petroleum, Natural Gas & Manufactured Gas, June, 15¢
  - 24- M: Gold Production, June, 10¢
  - 25- Statistical Report on the Operation of the Unemployment Insurance Act,  
July, 25¢
  - 26- M: Stocks of Dairy & Poultry Products, September 1, 20¢
  - 27- Dairy Factory Production, August, 10¢
  - 28- M: Margarine Statistics, August, 10¢
  - 29- M: Stocks of Fruit & Vegetables, September 1, 10¢
  - 30- M: Grain Statistics, Weekly, 10¢
  - 31- The Wheat Review, August, 20¢
  - 32- September Forecast of Production of Principal Field Crops, 10¢
  - 33- M: Farm Cash Income, April-June, 25¢
  - 34- M: Stocks of Meat & Lard, September 1, 10¢
- M - Memorandum  
R - Reference Paper

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

Bicycles crossing the Canada-U.S. border via toll bridges, ferries and the Detroit River tunnel numbered 8,731 last year, 655 more than in 1952 but 22% less than the post-war peak of 11,231 in 1949.

Tobacco Products: Quebec firms make over 93% of the tobacco, cigars and cigarettes produced in Canada.

Bakers baked close to 1,487,145,000 pounds of bread last year, over 2% less than the 1952 production of over 1,521,196,000 pounds. Higher prices, however, raised the total value more than 3% to \$166,546,000 from \$161,343,000.

Oilcloth: A record \$30,545,000 worth of oilcloth, linoleum and coated fabrics was made in Canada in 1952, almost twice as much as in 1946.

Cancer killed nearly four times as many Canadians in 1952 as all other notifiable diseases combined. The 17,710 cancer deaths contrasted with 4,775 caused by tuberculosis, polio and 39 other diseases. Heart disease, which is not notifiable, is still by far the leading cause of death.

Manufacturing: The average number of employees per firm ranged from 10.4 in the wood products group to 308.3 in the rubber products group.

Washing Machines: Canadian factories shipped 108,287 in the first half of this year, 18,252 or 17% fewer than in the first 6 months of 1953.

Commercial failures under the Bankruptcy and Winding Up Acts in the trade sector, where the greatest number of business mortalities usually occur, increased to 530 in the first 6 months this year from 287 in the first half of 1953. Failures of manufacturing establishments rose to 226 from 158, and insolvencies in the service field to 209 from 125.

Schools in cities in all provinces except Quebec averaged 35.7 pupils per class last year as compared with averages of 34.6 for town and village schools, 28.3 for rural schools of 2 to 5 rooms, and only 18 for one-room rural schools.

Whales: British Columbia fishermen landed 514 last year, 77 more than in 1952.

Leather footwear production fell 7% to 19,564,000 pairs in the first 6 months this year from 21,124,000 pairs in the first half of 1953.

Tuberculosis cases were nearly three times as numerous in Canada in 1952 as in 1924, but the disease caused less than one-third as many deaths — 2,457 as compared with 7,675.

Embroidery valued at \$3,700,000 was produced by Canadian firms in 1952, \$498,000 worth or 15.5% more than in the preceding year.

Oil wells across Canada produced a record 42,233,000 barrels of crude petroleum in the first 6 months this year, 26.5% more than 1953's first-half output of 33,391,000 barrels.

Corsets: Over 68% of all the corsets made in Canada are produced by manufacturers in Quebec.

Bakeries across Canada employed 33,420 persons last year, 409 more than in 1952, and paid them \$79,466,000, \$5,221,000 or about 2% more.

Ships: Of the 77 new vessels built in Canada last year, 39 were constructed in Nova Scotia, 13 in New Brunswick, 9 in Ontario, 6 in Quebec and 5 each in Newfoundland and British Columbia. However, the Quebec ships accounted for 21,412 tons of the total registered net tonnage of 30,331, and the Ontario ships for another 7,504 tons.



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