

WEEKLY BULLETIN

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Substantial Increase in Canal Traffic

Traffic on Canadian canals in June showed a substantial gain over the same month last year. The freight carried totalled 2,663,683 tons compared with 2,346,107 a year ago.

Trade via the United States

Canada's imports from overseas countries via the United States have steadily declined in recent years, especially those from the British Empire. This decrease has resulted from: (1) general propaganda to utilize Canadian sea and river ports; (2) additional concessions to goods imported under the British Preferential tariff if imported direct; and (3) provision in trade treaties and agreements negotiated with foreign countries that goods must be imported direct in order to obtain the full benefits of special rates of duty.

There was a decrease in imports from overseas countries via the United States during the fiscal year 1933 compared with similar imports in 1929, of \$7,977,377; the decrease in the imports from the British Empire amounting to \$2,278,047, and from foreign countries to \$5,699,330.

The exports from Canada to overseas countries via the United States show a decided decrease during recent years, the proportions for the fiscal year 1929 being about 36.71 per cent, 1930, 33.90 per cent, 1931, 27.49 per cent, 1932, 18.72 per cent, and 1933, 14.18 per cent, of the total exports to overseas countries. From 1929 to 1933 the proportion of the Dominion's exports to the United Kingdom via the United States decreased from 50.68 to 15.99 per cent; to Other British Empire from 28.90 to 10.74 per cent; and to Foreign Countries from 20.99 to 12.29 per cent.

When adjustments are made for the re-routing of Canadian barley, oats, rye and wheat from United States lake ports, via the St. Lawrence route for ocean shipment at Canadian sea or river ports, chiefly Montreal, it will be found that the proportions of Canada's exports to overseas countries via the United States will be considerably decreased and those via Canadian sea or river ports increased by a similar amount. The total value of commodities exported to overseas countries via the United States in 1933 was \$270,101,713 less than for the fiscal year 1929, wheat accounting for \$157,810,725 or 58.4 per cent of the decrease.

April Commercial Failures Lower

A decrease in the number of assignments under the Bankruptcy and Winding Up Acts, as reported to the Dominion Bureau of Statistics, was experienced in April, as compared with April, 1932, while the liabilities of the assignors also showed a slight decrease. Commercial failures numbered 184 in April, as compared with 192 in March and 190 in April, 1932. The liabilities of the assignors, amounting to \$3,022,466 as compared with \$3,380,672 in March, showed a decrease; when compared with \$3,170,679 in April, 1932, a decrease is again noted.

Export Clearances of Wheat Smaller

For the first time in the records of the Dominion Bureau of Statistics no Canadian wheat went overseas from a United States port during the week ending July 14. During the corresponding week a year ago the amount was 405,000 bushels. Clearances by ports were as follows, the figures within brackets being those of a year ago: Montreal 1,149,866 (1,327,433), Vancouver 652,135 (1,127,020), U.S. Atlantic seaboard ports nil (405,000), total 1,802,001 (2,859,453). Fifty weeks ending July 14: Vancouver 90,429,779 (72,744,342), Montreal 64,354,425 (50,751,482), United States ports 25,757,000 (31,171,000), Sorel 16,639,011 (6,602,101), Saint John 6,864,873 (2,017,008), Quebec 5,522,081 (120,248), Churchill 2,736,030 (544,769), Victoria 1,997,857 (224,000), Halifax 1,655,901 (45,189), Prince Rupert 976,480 (320,320), Total 216,933,437 (164,540,459).

Building Permits Higher

The value of the building permits issued by 61 cities during June was \$3,536,000; this was an increase of \$1,533,000 or 76 per cent, as compared with the May total of \$2,003,000. In connection with these figures, it should be noted that wholesale costs of building materials have been lower in 1933 than in any other year of the record. As compared with June, 1932, there were increases in Quebec, Manitoba and British Columbia, that of \$109,459 or 55.3 per cent in the last-named being largest. The remaining provinces showed decreases.

The June External Trade Makes Sharp Advance

Domestic exports in June totalled in value \$45,968,000, which was over five millions higher than in June last year and the largest export since December, 1931, with the single exception of October, 1932, when there was a very heavy wheat movement and the total export was \$56,626,000. The imports totalled in value \$33,619,000, the highest since November, 1932, with the single exception of March last when the imports were about \$700,000 greater.

The June Balance of Trade

The excess of all exports over imports in June was \$12,853,509, compared with \$864,670 in June, 1932. The excess of exports over imports in the twelve months ending June was \$104,904,552, compared with \$39,778,757 in the previous twelve months, an excess of imports over exports of \$63,918,508 in the twelve months ending June, 1931, and an excess of imports over exports of \$111,318,400 in the twelve months ending June, 1930.

Export of Agricultural Products to U.S. Increases

There was a very definite pick-up in the export of Canadian agricultural products to the United States in June the value of the total being \$546,000 compared with \$217,000 in June, 1932, an increase of \$329,000 or 152 per cent.

This increase in June follows the smaller advance of 9 per cent made in May. In June, 1930, when the Smoot-Hawley tariff came into operation the export of agricultural products to the United States was \$3,242,000.

The largest item last month was flaxseed at \$218,000, although the duty is 65¢ per bushel. Bran, shorts and middlings totalled \$118,000, the duty being 10 per cent ad valorem; horses, under a duty of \$20, were valued at \$25,000; cheese with a tariff of 7¢ per pound \$46,000; and wool under a tariff of 24¢--37¢ per pound \$55,000.

Exports to Empire Countries Show Impressive Increase

Canada's domestic exports to British Empire countries in June totalled in value \$21,889,602, compared with \$14,963,270 in June last year, a gain of \$6,926,332 or 46 per cent.

Canada's domestic exports to the United Kingdom in June totalled \$17,977,106, compared with \$11,371,590 in June a year ago, a gain of \$6,605,106, or 58 per cent.

The exports to the United Kingdom and the Empire in June were the largest since November, 1932. Selling in the fall is normally higher than at this season of the year. The November total was \$22,644,307.

Empire Countries to Which Increased Exports went in June

Domestic exports in June show increases to the following British Empire countries, the figures within brackets being those of a year ago: United Kingdom \$17,977,106 (\$11,371,590), Irish Free State \$433,332 (\$411,666), Aden \$2,892 (\$883), British East Africa \$35,336 (\$16,340), British South Africa \$378,240 (\$350,167), Gold Coast \$18,125 (\$7,203), Nigeria \$5,155 (\$3,319), Sierra Leone \$3,766 (\$754), British India \$337,677 (\$158,213), Straits Settlements \$57,901 (\$15,355), British Guiana \$67,102 (\$61,214), British Honduras \$24,937 (\$23,284), Barbados \$99,227 (\$92,216), Jamaica \$227,336 (\$220,773), the Smaller West Indies \$123,632 (\$111,829), Malta \$11,344 (\$5,099), Australia \$841,251 (\$794,520), Fiji Islands \$11,950 (\$8,928), New Zealand \$423,343 (\$325,578), Southern Rhodesia \$10,511 (-).

The Course of Canadian Exports to Empire Countries

The British Empire trade agreements went into effect on November 15, 1932. In December, the first clear month of trading the exports totalled \$20,581,000, a decline of \$46,000 compared with December, 1931. After the New Year, however, exports to Empire countries began to swell. The total for the first six months under Empire agreements was \$95,417,000, an increase of \$9,808,000 or 11 per cent. In May the total was \$21,663,000, an increase of 41 per cent and in June the total of \$21,890,000 was an increase of 46 per cent.

Record Export of Canned Salmon to France

A surprisingly speedy result has followed the promulgation on June 10 of the new trade treaty with France. The June export of canned salmon to France was 3,241,400 pounds at a declared value of \$232,190. The June, 1932, export was 867,500 pounds and the June, 1931, volume was 237,900 pounds. This is an important Canadian industry which has been encountering difficulties in overseas markets. The largest previous export was 2,613,400 pounds in October, 1930, and the next largest 1,305,800 pounds in July, 1931.

Canada's Position in International Trade

Canada, amongst the principal commercial nations has maintained a high position in international trade during the calendar year 1932, says the Dominion Bureau of Statistics. There have been some notable changes in 1932 in the relative position of certain leading trading countries of the world. Germany in 1932 as in 1931, occupied second position in export trade, the United Kingdom being in third position, while Canada once more moved up to fifth place, displacing Belgium and Argentina. In import trade in 1932 Canada moved down to ninth place, yielding eighth place to Japan, but in total trade she occupied seventh place, as in 1931.

The following was the order of importance in exports in 1932: United States, Germany, United Kingdom, France, Canada, Belgium, Japan, British India, Italy, Netherlands, Argentina. The order of importance in imports: United Kingdom, United States, France, Germany, Netherlands, Belgium, Italy, Japan, Canada, British India, Switzerland, Argentina.

Canada's Export Trade in the First Quarter of the Present Fiscal Year

Canada's domestic exports in the first three months, April, May and June, of the current fiscal year totalled in value \$111,656,000 as against \$108,256,000 in the same period a year ago. This was an increase of \$3,300,000 or 3 per cent.

The exports to British Empire countries totalled \$51,441,000 as compared with \$39,622,000, an increase of \$11,819,000 or 29.8 per cent.

The total to foreign countries was \$60,115,000 compared with \$68,634,000, a decrease of \$8,519,000, or 12.4 per cent.

Thus it will be seen that it was the great advance in exports to British Empire countries that overcame the decrease to foreign countries and gave the total exports their increase over the corresponding period a year ago.

The last three months' domestic exports to the United Kingdom totalled in value \$41,829,000 compared with \$30,819,000, an increase of \$11,010,000, or 35.7 per cent.

The total to the United States was \$37,086,000 as against \$42,020,000, a decrease of \$4,934,000, or 11.7 per cent.

This demonstrates how the United Kingdom has taken the place of the United States as Canada's best market, and also shows that it is owing to the great increase in that trade that Canada has been enabled to show a gain in the first quarter of 1933-4.

Volume and Value Export

Whilst Canada's domestic exports to all countries in 1932 declined 8.3 per cent in volume compared with 1931 the decline in value was 17.8 per cent.

Property Exempted from Taxation

The assessment value of the property in Canada exempted from taxation in 1931 was over a billion and a half dollars. Exempted property consists mainly of dominion, provincial and municipal property, and educational, charitable and religious institutions. The total taxable property in the Dominion was valued for assessment purposes at \$8,222,260,000, so that the proportion of the exempted property was almost 20 per cent.

Quebec led with \$705,798,000 exempted property, Ontario \$536,536,000, Manitoba \$156,794,000, British Columbia \$149,275,000, Nova Scotia \$48,119,000, Prince Edward Island \$1,828,000. The returns from New Brunswick, Saskatchewan and Alberta do not show the amount of the non-taxable property.

The total taxable valuations in Canada were \$8,752,119,000, of which Ontario had \$3,183,152,000, Quebec \$2,223,479,000, Saskatchewan \$1,134,461,000, British Columbia \$688,096,000, Alberta \$595,745,000, Manitoba \$557,103,000, Nova Scotia \$177,216,000, New Brunswick \$153,565,000, Prince Edward Island \$39,302,000.

Taxable real property, amounting to \$8,222,260,000 was distributed as follows: Ontario \$2,811,763,000, Quebec \$2,210,943,000, Saskatchewan \$1,089,729,000, British Columbia \$688,096,000, Alberta \$579,960,000, Manitoba \$539,012,000, Nova Scotia \$140,107,000, New Brunswick \$130,053,000, Prince Edward Island \$32,596,000.

Personal property taxable totalled in value \$61,888,000, of which Nova Scotia had \$24,383,000, New Brunswick \$23,511,000, Manitoba \$7,657,000, and Prince Edward Island \$6,336,000.

Ontario's taxable real property was \$1,651,080,000 in the cities, \$359,159,000 in the towns and villages and \$801,524,000 in the rural municipalities. Quebec had \$1,473,754,000 in the cities, \$207,744,000 in the towns, \$527,050,000 in the rural municipalities and \$2,394,000 in the independent rural municipalities. Saskatchewan had \$111,523,000 in the cities, \$36,509,000 in the towns, \$41,806,000 in the villages and \$899,892,000 in the rural municipalities. British Columbia had \$534,047,000 in the cities, \$4,429,000 in the villages and \$149,620,000 in the districts.

Copper Production in April

Canadian copper production in April amounted to 19,776,008 pounds as compared with 21,708,287 pounds in March and 22,077,843 in April, 1932. Blister copper output in April declined to 17,648,082 pounds from the March total of 18,915,437 pounds. During the first four months of 1933 the total copper output in Canada was 81,600,744 pounds or 7.1 per cent below the production in the corresponding period in 1932.

Silver Production in April

An increase of 5.1 per cent over the preceding month was recorded in silver production in Canada during April. The month's output amounted to 1,350,974 ounces as compared with 1,285,888 ounces produced in March. During April, 1932, the production was 1,645,094 ounces.

Food Prices Higher in June

The index number of retail prices, rents, and cost of services rose from 77.6 in May to 77.7 for June, declines for fuels being more than offset by higher prices for foods. An index excluding foods, rents, and services declined from 76.6 to 76.5. Considered over a period of years, this group has shown an almost unbroken decline since the beginning of 1929, in January of which year the index stood at 97.3.

The index for 46 food items, continuing the upward movement first apparent in March, 1933, rose from 61.9 to 62.2, gains for flour, bread, onions, potatoes, sugar and some meats being more important than losses for milk, butter and lard. Flour moved up from 2.7¢ to 2.9¢ per pound, while bread at 5.6¢ per pound loaf was fractionally higher. Potatoes were 20.8¢ per peck in June as compared with 19.4¢ for May. Advances in fresh pork from 15.1¢ to 15.7¢, and in salt pork from 14.6¢ to 15.1¢ per pound were indicative of higher meat prices. Both yellow and granulated sugar were fractionally higher. Milk registered a seasonal decline from 9.3¢ to 9.1¢ per quart. Creamery butter fell from 27.0¢ to 23.9¢, and dairy butter from 24.0¢ to 20.8¢ per pound.

The fuel and lighting index moved down from 88.5 to 87.8, influenced by seasonal declines for coal, coke and wood. Fuel prices have shown a downward tendency in the last year and a half. The three sub-indexes declined as follows: Coal from 90.1 to 89.4; wood from 83.0 to 81.7; and coke from 81.0 to 79.8. Indexes for other groups were unchanged.

Zinc Production in Canada

The output of zinc in Canada during April amounted to 13,415,286 pounds as compared with 13,808,497 pounds in March and 14,650,218 pounds in April, a year ago.

Lead Production in April

The Canadian output of lead in April totalled 23,614,659 pounds, an increase of 22.8 per cent over the March total of 19,223,069 pounds and 9.2 per cent over the April, 1932, production of 21,624,442 pounds.

North American Wheat Situation

World wide attention has been focussed on wheat crops in Canada and the United States during the past month. The crop situation in North America first received consideration with the unfavorable start received by the United States winter wheat crop in the fall in 1932. The extent of the damage sustained by this crop was more fully realized in the spring of 1933 when it became evident that about 30 per cent of the originally sown acreage had been abandoned and that the condition of the remaining crop was very poor. These conditions were crystallized in the official reports issued by the United States Department of Agriculture in April, May and June when the 1933 winter wheat crop was estimated at from 334 to 341 million bushels.

The month of June brought startling developments in the North American situation when unfavorable climatic conditions spread in a northerly direction and damaged the spring wheat crops of the United States and Canada. On June 1, 1933 crop prospects in the spring wheat areas of the United States were described as "average," while the Canadian situation was probably the most favorable for several years. In June climatic conditions turned very unfavorable for growing crops and serious damage was sustained by spring wheat crops in the United States and the southern areas of the Prairie Provinces. Extreme heat combined with drought is a condition usually associated with the month of July. This season, however, the young wheat plant was subjected to these elements early in its growth and permanent damage was sustained.

On July 9, the United States Department of Agriculture estimated the 1933 spring wheat crop at 160 million bushels compared with 265 million bushels in 1932 and an average crop of 271 million bushels from 1926 to 1930. On July 11 the Dominion Bureau of Statistics issued a report showing a sharp reduction in the condition of the wheat crop in all three Prairie Provinces. The net result of climatic conditions during June was to greatly reduce prospective wheat production in both Canada and the United States.

Condition figures for the Prairie Provinces at the end of June indicated that crop damage had been sufficient to ensure a crop considerably below average. It is probable even on the basis of a considerable increase in the Canadian carry-over on July 31 as compared with a year ago, that Canada will not have a total surplus any larger than during 1932-33 and probably somewhat less.

International Trade in Wheat

While an unusual crop situation has been developing in Canada and the United States, the International movement of wheat has continued on a small scale. During the past six weeks world shipments have averaged only 9 million bushels per week, over half of which originated in the Argentine and Australia. From August 1, 1932 to July 16, 1933, world shipments of wheat and wheat flour have amounted to 595 million bushels compared with shipments of 751 million bushels for the same period in 1931-32. It is now apparent that world trade in wheat during 1932-33 will amount to about 615 million bushels or only slightly higher than in 1929-30 when trade was decidedly small.

In the face of a restricted international movement of wheat during the present crop year Canada and Australia have increased exports over the levels of 1931-32. The failure of Russia, the Danubian countries and the United States to take an active part in the wheat market in 1932-33 has enabled the Empire exporting countries to record a satisfactory achievement.

The limited extent of world trade in wheat during 1932-33 can be attributed to a number of causes among which may be mentioned the large European crops of 1932, the maintenance of rigid restrictions governing the importation of wheat into many deficit areas and the general difficulties of maintaining trade in the face of curtailed purchasing power and fluctuating exchanges.

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