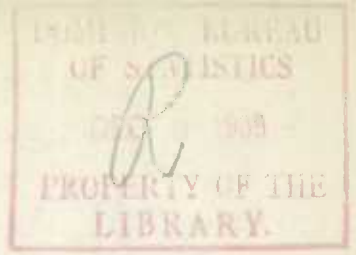


WEEKLY BULLETIN

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Weekly Review of Economic Conditions

Five of the six factors used in the compilation of the economic index registered advance in the first week of December. The only item which failed to join the forward march was common stock prices. Carloadings and wholesale prices continued to register gains over the same week of last year but the financial factors, including bonds, clearings, common stocks and trading, more than counterbalanced the increases of the former.

An encouraging advance was shown in carloadings during the 47th week, the total having been 59,761 cars against 58,370 in the previous week and 48,269 in the same period of 1938. Consequently, the adjusted index rose to 82.7, the highest since mid-October. Congestion at western elevators served to depress the index during November but this condition has been relieved and the late season has facilitated shipping. The cumulative total for the 47 weeks reached nearly 1,074,000 cars, a gain of 24 per cent over the same period of 1938. Nine of the twelve commodity groups were higher, while pulpwood, miscellaneous and merchandise, l.c.l., were in arrears. Splendid increases in both eastern and western divisions are indicated.

The general index of commodities at wholesale continued to advance, rising from 79.9 to 80.2 on the week. Six of the eight major groups moved forward, while iron and non-ferrous metals were unchanged. Canadian farm products rose nearly a point to 65.5, but farm prices are still below parity with the goods which the farmer must buy. The weekly price index has shown a steady but unmistakable upward trend after the sharp rise at the outset of the war. The index at 80.2 has crossed the 80-line for the first time since June, 1938, and with the exception of 1937 is at the highest level for this time of year since 1929. Wheat was decidedly stronger as British shipments moved forward, No. 1 Northern rising four cents to 74 3/8 on the 2nd. Oats, barley, flax and rye joined in the advance, regaining the ground lost during October and November. Pork and cattle prices declined but a bacon agreement with the United Kingdom is expected to raise prices on domestic markets and encourage producers. Metal prices were firm at Montreal but tin and zinc experienced some recession at New York.

Bond prices were slightly higher in the last week of November with the market awaiting plans for war financing. By December 5th some issues showed minor decline compared with November 28th. The downward movement in Canadian common stocks initiated in the final week of October continued to the end of November and the fluctuation has followed the pattern of the preceding year. In the industrial section, machinery and equipment and milling were the only issues to register net gain on the week, utilities and banks were moderately stronger but mining stocks drifted downward. Weakness coincided with the outbreak of hostilities between Russia and Finland. Increased pressure on sterling was noted but Canadian funds stiffened at New York. Trading on the stock exchanges was relatively quiet.

The weekly index at 105.2 in the week of December 2 showed an advance of 1.6 per cent over the preceding week but was nearly a point below the standing in the same week one year ago.

Weekly Index with the Six Components  
1926=100

Week Ended	Car loadings <sup>1</sup>	Whole-sale Prices	Capitalized Bond Yields <sup>2</sup>	Bank Clearings <sup>3</sup>	Prices of Common Stocks	Shares Traded	Weekly Index <sup>4</sup>
Dec. 3, 1938	66.6	73.4	162.1	90.6	107.5	96.0	106.1
Nov. 25, 1939	77.9	79.9	144.7	83.0	102.0	81.2	103.5
Dec. 2, 1939	82.7	80.2	145.1	86.1	101.5	82.7	105.2

1. The index of carloadings is projected forward one week to correspond with the practice in computing the weekly index. 2. Present value of a fixed net income in perpetuity from Dominion long-term bonds. 3. Bank clearings were smoothed by taking a three weeks moving average for the purpose of eliminating irregular fluctuations. Totals for Ottawa were eliminated for all weeks shown, owing to incomparability introduced by the operations of the Bank of Canada. 4. The weighting of the six major factors is determined from the standard deviation from the long-term trend of each, based on data for the period from January 1919 to August, 1936. The weighting therefore represents, not an attempt to give the relative importance of the factors, but to place them on an equal footing by equating the tendency toward fluctuation. The long-term trend determined from half-yearly data in the post-war period was eliminated from the composite and the resulting index expressed as a percentage of the average during 1926.



## Economic Conditions in Ten Months of 1939

As the business year 1939 draws to a close a survey of the leading economic factors indicates that Canada has enjoyed a measure of steady recovery with nearly all months showing improvement over the same months of 1938. In the first two quarters gains were moderate, but with the advent of a splendid harvest and the outbreak of war, the advantage has been widened month by month. Present indications from volume and price data suggest that the purchasing power of Canadians was increased at least 5 p.c. during the year with a more equitable distribution throughout the nation.

Industrial production, as measured by a comprehensive index, showed a gain of more than 9 p.c. in the first ten months compared with the same months of 1938 and the October figure reached a near record peak of 139.7 only exceeded by January, 1929. A reactionary factor has been the decline in wholesale prices. The 10-month average of common stock prices was 3 p.c. below the level of 1938. Mining stocks, on the other hand, showed an advance of nearly 4 p.c. The bond market was steady until August, but the bursting of the war clouds led to a precipitous decline. Prices rebounded, however, in October.

Canada's mineral production this year has ruled about 10 p.c. better than in 1938, with gold, nickel, zinc and coal output reaching encouraging levels. The decline in copper was slight but lead and silver were mined in smaller volume. Nickel exports in the ten months at over 197 million pounds was nearly 20 p.c. in excess of the preceding year. Shipments of gold to the Mint reached 4,042,650 ounces, representing a value of over \$141,000,000 in new wealth, a gain of 12.2 p.c. over 1938. Canada's coal-mining industry, which employs a considerable labour force, has at last been reinvigorated after years of discouraging conditions. Increased activity in the iron and steel mills is responsible for part of the current advance.

In the manufacturing sphere the barometer rose 9.5 p.c. to 115.3 in the 10-month comparison. All the principal commodities were produced in greater volume, particularly foodstuffs, tobacco, leather goods, textiles, paper and lumber, steel, rubber and petroleum. Cattle and hogs were processed in larger volume, the latter, with an eye to British needs, advancing over 8 p.c.

The newsprint industry has enjoyed a progressive year with the outlook encouraging in the face of reduced European competition. Production at 2,339,884 tons showed an advance of nearly 8 p.c. The export of planks and boards rose about 35 p.c. in the ten months. The automobile industry, harried by a strike in the United States plant of a leading producer, has been slow to effect recovery and the ten-month reading shows a loss of 15 p.c. Imports of crude rubber, reflecting some forward buying, rose nearly 33 p.c.

The construction industry registered minor acceleration during the elapsed portion of the year. Contracts awarded were \$165,010,000 to October 30, an advance of over 2 p.c. Reflecting the greater industrial activity, electric power output rose 9 p.c. and producers are beginning to look to their resources for future demands.

The export trade which is of great concern in the problem of exchange, was valued at \$735.5 million, exclusive of gold, against \$692 million, a gain of 6.3 p.c. Imports were also active, advancing to \$594.7 million, leaving a favourable balance of trade on merchandise account of nearly \$141 million.

The railways are beginning to see daylight again. Carloadings rose 3.3 p.c. in the 10 months and earnings of the C. N. R. domestic lines advanced nearly  $7\frac{1}{2}$  p.c., while an improvement of 3.7 p.c. was noted in the earnings of the C. P. R.

Employment on the first eleven reporting dates gained 1.3 p.c. over the preceding year and present indications confirm the expectation that record levels are at hand. All the leading classifications with the exception of logging, have shown significant increase and the outlook for employment in lumbering is encouraging.

The present position of the chartered banks gives cause for satisfaction when we recall conditions during the early months of the last great war. At that time uncertainty and lack of public confidence were not unknown. Deposits are at record levels, the 10 month average being 4.5 p.c. above the standing in 1938 at \$2,410 million compared with \$2,305 million. Current loans averaged \$832 million against \$779 million, an increase of nearly 7 p.c. The banks are in a strong position to finance the early stages of our war effort and a federal loan of \$200,000,000, principally to meet refunding in London, was picked up promptly in October. Total security holdings averaged \$1,517 million, a gain of  $5\frac{1}{2}$  p.c. over the same months of last year. Readily available assets are nearly 11 p.c. in excess of the level of 1938.



Statistics Illustrating the Economic Situation of Canada in Ten Months of 1939  
Compared with the Same Period of 1938

Item	Unit or base period	First Ten Months of 1939	1938	Increase + Decrease - Per cent
<u>General Economic Situation</u>				
Index of Physical Volume of Business	1926=100	120.2	110.4	+ 8.9
Index of Industrial Production	1926=100	123.1	112.6	+ 9.3
Wholesale Prices	1926=100	74.4	79.6	- 6.5
Index of Common Stock Prices	1926=100	100.1	103.2	- 3.0
Capitalized Bond Yields, Dominion	1926=100	156.9	157.0	-
Mining Stock Prices	1926=100	151.0	145.4	+ 3.9
Bank Debits	\$ 000	25,630,139	25,010,198	+ 2.5
<u>Production and General Business</u>				
Mineral Production	1926=100	213.3	193.9	+ 10.0
Copper Exports	Lbs.	451,862,000	457,489,700	- 1.2
Nickel Exports	Lbs.	197,374,400	164,855,600	+ 19.7
Zinc Exports	Lbs.	295,893,500	260,929,000	+ 13.4
Gold Shipments to Mint	Fine Ozs.	4,042,650	3,604,235	+ 12.2
Silver Shipments	Fine Ozs.	18,130,319	19,078,316	- 5.0
Coal Production	Tons	12,203,582	11,333,734	+ 7.7
Manufacturing Production	1926=100	115.3	105.3	+ 9.5
Flour Production (9 mos.)	Bbls.	11,237,113	9,182,119	+ 22.4
Sugar Manufactured	Lbs.	809,120,369	822,174,714	- 1.6
Cattle Slaughtering	No.	1,313,810	1,303,745	+ 0.8
Hog Slaughtering	No.	2,747,733	2,542,296	+ 8.1
Cigarettes released	No.	5,980,875,494	5,751,515,034	+ 4.0
Cigars released	No.	103,511,928	107,319,726	- 3.5
Leather Boots and Shoes (9 mos.)	Prs.	16,026,146	15,029,863	+ 6.6
Raw Cotton Consumption	Lbs.	98,229,487	91,356,644	+ 7.5
Paper and Lumber -				
Newsprint Production	Tons	2,339,884	2,169,532	+ 7.9
Exports of Planks and Boards	000 Ft.	1,823,970	1,352,951	+ 34.8
Iron and Steel -				
Steel Ingot Production	Long Tons	1,087,583	982,634	+ 10.7
Pig Iron Production	Long Tons	573,740	605,472	- 5.2
Automobile and Allied Industries -				
Automobile Production	No.	119,926	141,803	- 15.4
Petroleum Imports	000 Gals.	1,099,020	1,056,956	+ 4.0
Crude Rubber Imports	Lbs.	60,631,009	45,644,511	+ 32.8
Construction -				
Contracts Awarded	\$	165,010,000	161,572,700	+ 2.1
Building Permits	\$	49,283,013	52,691,485	- 6.5
Electric Power Production	000 K.W.H.	23,209,384	21,267,787	+ 9.1
External Trade -				
Exports *	\$	735,458,619	691,990,465	+ 6.3
Imports	\$	594,984,985	569,861,699	- 4.4
Excess of exports* over imports	\$	140,473,634	122,128,766	+ 15.3
Railways -				
Carloadings	No.	2,100,774	2,034,106	+ 3.3
Gross Revenue C.N.R. (Can. Lines)	\$	139,408,250	129,831,172	+ 7.4
Gross Revenue C.P.R.	\$	122,555,545	118,176,208	+ 3.7
<u>Employment 11 months' average, unadjusted</u>				
General Index	1926=100	113.1	111.6	+ 1.3
Manufacturing		111.4	111.3	+ 0.1
Logging		105.9	140.6	- 24.7
Mining		163.2	155.2	+ 5.2
Construction		114.8	104.7	+ 9.6
Building		61.0	59.2	+ 3.0
Highway		224.4	195.4	+ 14.8
Trade		135.9	132.9	+ 2.3
<u>Banking - 10 Months' Average</u>				
Notice and Demand Deposits	\$	2,409,680,075	2,305,278,687	+ 4.5
Readily Available Assets	\$	1,778,814,312	1,603,530,761	+ 10.9
Current Loans	\$	832,109,009	779,034,710	+ 6.9
Call Loans - Canada	\$	54,562,187	67,183,866	- 18.8
Elsewhere	\$	47,832,265	51,835,303	- 9.6
Security Holdings	\$	1,517,096,005	1,438,676,353	+ 5.5

40 factors advanced.  
12 factors declined.

1 unchanged.  
\* excluding gold.



## Business Operations Advance in October

Canadian business which had been driving along in second gear during the early months of the year shifted into high in the month of October. The index of the physical volume of business jumped over seven points from the September level to 133.1. This is the highest October on record and is only exceeded by January 1929. The latest indexes of employment confirm the advance, the adjusted November 1st figure at 118.3 being the third highest November 1st on record.

Encouraging advances were registered during the month in the leading manufacturing industries, notably foodstuffs, tobacco, rubber, newsprint, lumber, iron and steel, automobiles and petroleum. Mining, owing to a slowing down of exports declined from the high level of September, but when shipping problems have been straightened out it is expected that the upward trend will be resumed. Live stock marketings and cold storage holdings showed appreciable gains over September, while grain shipments were reduced, due principally to storage difficulties.

### Business Indexes in October Compared with September, 1926=100

Index	1939	
	September	October
Physical Volume of Business .....	125.8	133.1
Industrial Production .....	128.3	139.7
Mineral Production .....	223.2	194.2
Copper exports .....	545.6	264.9
Nickel exports .....	523.5	495.7
Lead production .....	135.0	-
Zinc exports .....	251.7	108.8
Gold, mint receipts .....	373.9	323.6
Silver shipments .....	95.4	93.3
Asbestos exports .....	144.1	136.6
Bauxite imports .....	519.6	440.0
Coal production .....	96.1	94.8
Manufacturing .....	121.3	143.7
Foodstuffs .....	110.0	126.8
Flour production .....	108.4	-
Oatmeal production .....	42.3	-
Sugar manufactured .....	74.8	97.8
Inspected slaughterings .....	151.8	172.1
Cattle .....	140.7	140.8
Sheep .....	140.1	131.8
Hogs .....	160.4	196.5
Creamery butter .....	155.8	153.1
Factory cheese .....	64.2	56.4
Salmon exports .....	128.4	158.0
Tobacco .....	168.3	213.0
Cigar releases .....	67.1	65.2
Cigarette releases .....	212.7	275.7
Rubber imports .....	160.5	325.8
Boots and shoes production .....	113.7	-
Textiles .....	150.0	131.3
Cotton consumption .....	152.1	143.3
Cotton yarn imports .....	76.1	87.0
Wool, raw and yarn .....	168.8	91.6
Forestry .....	130.7	139.3
Newsprint .....	165.6	168.3
Wood pulp exports .....	55.1	85.9
Planks and boards exports .....	110.3	119.6
Shingles exported .....	111.5	119.4
Iron and steel .....	98.2	134.1
Steel production .....	214.8	245.6
Pig iron production .....	110.5	168.4
Iron and steel imports .....	105.5	66.3
Automobile production .....	66.4	117.7
Coke production .....	126.7	139.1
Crude petroleum imports .....	225.4	288.2
Construction .....	48.6	43.3
Contracts awarded .....	52.9	42.6
Building permits .....	37.9	45.0
Cost of construction .....	94.4	94.8





## Business Indexes in October Compared with September, 1926=100

Index	1939	
	September	October
Electric power .....	246.0	245.6
Distribution .....	118.4	114.3
Trade employment .....	138.0	138.3
Carloadings .....	95.6	80.0
Imports .....	102.0	99.3
Exports, excluding gold .....	112.8	106.9
Producers' Goods .....	120.6	118.6
Consumers' Goods .....	124.7	139.7
Marketings -		
Grain and Live Stock Marketings .....	174.4	96.5
Grain Marketings .....	196.5	96.0
Wheat .....	216.2	96.7
Oats .....	44.6	70.9
Barley .....	130.3	136.3
Flax .....	22.4	16.2
Rye .....	40.6	152.0
Live Stock Marketings .....	75.7	99.6
Cattle .....	64.9	91.1
Calves .....	120.2	154.3
Hogs .....	87.8	106.2
Sheep .....	80.5	90.3
Cold Storage Holdings .....	145.9	152.6
Eggs .....	88.9	84.9
Butter .....	216.0	227.3
Cheese .....	145.9	144.5
Beef .....	113.8	151.0
Pork .....	109.8	130.0
Mutton .....	255.0	175.9
Poultry .....	207.6	259.4
Lard .....	72.7	57.0
Veal .....	271.9	293.0

Car Loadings

Car loadings for the week ended November 25 totalled 59,761 cars compared with 58,370 in the previous week and 48,269 in the corresponding week last year. Congestion at western elevators was relieved and grain loadings in the western division increased from 5,989 cars in the previous week to 8,566; grain loadings in the eastern division were also heavier.

Bank Debits in October

With four of the five economic areas recording increases, bank debits in October rose to \$2,898,916,000 from \$2,831,651,000 in September. The October total was \$2,932,817,000. The total for the first ten months of 1939 was \$25,630,139,000 as compared with \$25,010,198,000 in the corresponding period last year, a gain of 2.5 per cent.

The September amounts follow by areas, the figures for 1938 being in brackets: Maritime Provinces, \$68,752,492 (\$52,714,455); Quebec, \$774,444,900 (\$945,207,074); Ontario, \$1,151,563,125 (\$1,117,363,350); Prairie Provinces, \$727,662,186 (\$630,513,901); British Columbia, \$176,493,064 (\$187,018,139).

Production of Asbestos

Shipments of asbestos during September rose to 38,124 tons from the previous month's total of 35,886 and the September 1938 output of 28,297 tons. The total during the nine months ended September was 246,888 tons in comparison with 208,632 in the same period last year.



### Production of Gypsum

Canada's September production of gypsum was recorded at 196,321 tons compared with 191,637 in August and 118,550 in September, 1938, while the total during the nine months ended September was 907,130 tons as against 734,289 in the corresponding period last year.

### Production of Gold in September

Canada's production of gold in September amounted to 421,485 ounces valued at \$15,682,614. In August the output was 449,207 ounces and in September 1938 it was 408,326. During the nine months ended September the Canadian output totalled 3,803,202 ounces, which was 9.8 per cent in advance of the corresponding period last year.

The September production by provinces was as follows, with figures for August in brackets: Ontario, 247,412 (265,825) ounces; Quebec, 79,398 (81,665); British Columbia, 52,038 (55,454); Manitoba and Saskatchewan, 22,636 (22,712); Yukon alluvial and lode gold and North West Territories lode gold, 17,567 (20,620); Nova Scotia, 2,415 (2,889).

### Production of Coal and Coke

Coal production in October rose to 1,747,663 tons from the October 1938 output of 1,503,608, and included 1,122,662 tons of bituminous, 554,430 of lignite and 70,571 tons of sub-bituminous coal. Output during the ten months ended October advanced to 12,283,593 tons from the 1938 total of 11,390,891.

Canada imported 1,949,633 tons of coal in October, recording an advance of almost 25 per cent over the average for the month during the past five years. Anthracite imports included 351,133 tons from the United States, 94,836 from Great Britain, 25,972 from French Indo-China and 3,934 from Germany. Receipts of bituminous coal were made up of 1,470,592 tons from the United States and 2,796 from Great Britain. Lignite imports consisted of 343 tons from the United States and 27 from Alaska.

Exports of Canadian coal amounted to 42,053 tons as against 25,826 in October 1938, and 37,589, the five-year average for the month. Canada's coal supply for October was computed at 3,655,243 tons compared with 2,935,263 a year ago.

### Cement Production in September

Cement shipments in September from Canadian plants amounted to 852,197 barrels compared with 841,736 in August and 702,866 in September, 1938. During the nine months ending September shipments totalled 4,425,535 barrels, an increase of 4.5 per cent over the same period last year.

### Clay Products

Sales of clay products manufactured from domestic clays were valued at \$533,956 in September compared with \$521,341 in August and \$535,822 in September last year. The nine-months sales were \$3,124,530, or 5.9 per cent below the total for the corresponding period last year.

### Production of Iron and Steel

Production of iron and steel and their manufactures during 1938 amounted to \$550,493,894 at factory prices. This value was 11.9 per cent below the total for 1937, but it was higher than any other year since 1930. There were substantial declines in pig iron, steel and rolled products; iron castings and steel forgings; boilers, tanks and engines; machinery; automobiles; bicycles; railway rolling stock; wire and wire goods; sheet metal products; hardware, cutlery and tools; and bridge and structural steel. There was an increased output for heating and cooking apparatus, farm implements, aircraft, ship-building and repairs, and miscellaneous iron and steel products.

### Production of Aluminium

Canada produced 66,000 metric tons of aluminium in 1938, ranking third amongst world countries as a producer of the metal. World production in 1938, as reported by the American Bureau of Metal Statistics, totalled approximately 583,597 metric tons compared with 489,830 in 1937 and 255,801 in 1928. The average price per pound was 20 cents in 1938.



### Production of Antimony

Antimony production in Canada during 1938 totalled 24,560 pounds valued at \$2,200. This output represents the estimated recoverable metal contained in auriferous ores mined at West Gore, Nova Scotia. The ore as thus described was shipped for smelting in England. Prior to the close of 1938 there had been no commercial production since 1917 and no by-product output of the metal since 1926. During the first six months of 1939 the Consolidated Mining and Smelting Company of Canada Limited, recovered 388,040 pounds from British Columbia ores.

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### Output of Bismuth

The total output of bismuth in the Dominion to the close of 1938 amounted to 1,122,303 pounds worth \$1,309,406. The largest annual production occurred in 1936, in which year 364,165 pounds valued at \$360,523 were recovered. Bismuth production in Canada represents the metal recovered from silver-lead ores smelted at Trail, British Columbia, and the metal contained in silver-lead-bismuth bullion produced in the treatment of silver-cobalt ores at Deloro, Ontario.

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### Cadmium Production

The output of cadmium in the Dominion in 1938 totalled 699,138 pounds valued at \$561,799 compared with 745,207 at \$1,222,140 in 1937; the value of the 1937 production was an all-time high record in Canadian production of the metal; of the 1938 production, 510,342 pounds valued at \$410,090 were credited to British Columbia, 115,166 at \$92,543 to Manitoba and 73,630 at \$59,166 to Saskatchewan.

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### Selenium Production

Production of selenium in Canada during 1938 totalled 358,929 pounds valued at \$622,742 compared with 397,227 worth \$687,203 in 1937. Of the output in 1938, there were 217,952 pounds recovered from copper-gold ores mined in Quebec, 54,577 pounds from nickel-copper ores of the Sudbury District, Ontario, and 86,400 from copper-gold ores mined in Manitoba and Saskatchewan.

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### Visible Supply of Wheat

Canadian wheat in store for the week ending December 1 amounted to 350,178,010 bushels compared with 360,192,977 in the previous week and 170,655,019 in the corresponding week last year. The amount of Canadian wheat in store in the United States was 33,882,333 bushels compared with 24,438,890 the week before and 8,280,000 a year ago.

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### Primary Movement of Wheat

Wheat receipts in the Prairie Provinces for the week ending December 1 amounted to 5,849,493 bushels compared with 9,260,098 in the previous week and 3,145,123 in the corresponding week last year. By provinces the receipts were as follows, with 1938 in brackets: Manitoba, 273,741 (197,033) bushels; Saskatchewan, 2,359,940 (1,176,676); Alberta, 3,215,812 (1,771,414).

Marketings for the 18 weeks ended December 1 aggregated 347,404,736 bushels compared with 246,033,325 in the corresponding period last year. The receipts were as follows, with figures for the same period last year in brackets: Manitoba, 50,008,388 (39,707,700) bushels; Saskatchewan, 196,004,092 (98,535,744); Alberta, 101,392,256 (107,789,881).

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### Overseas Export Clearances of Wheat

The export clearances overseas of wheat from Canadian and United States ports during the week ending December 1 amounted to 5,337,485 bushels, while the imports into the United States for consumption and milling in bond were 182,000 bushels, totalling 5,519,485 as compared with 2,860,249 in the corresponding week of 1938.

The accumulated total of export clearances during the 18 weeks ended December 1 was 44,412,108 bushels and United States imports 3,606,207, making a grand total of 48,018,315 bushels in comparison with 66,157,050 in the corresponding period of the previous crop year.

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### Stocks of Raw Sugar

The amount of raw sugar in the refineries of Canada on January 1, 1939, was 78,038,093 pounds, while the quantity received during the period from January 1 to November 4 was 765,381,886 pounds, making 843,419,979 for manufacture. Meltings and sales of raw sugar accounted for 763,353,243 pounds, leaving 80,066,736 on hand in the refineries on November 4, compared with 3,790,094 at the end of the last four-week period ending October 7 and 89,644,655 on the same date last year. Stocks of raw sugar increased 76,276,642 pounds over the amount in store at the end of the last four-week period, which was 9,577,919 less than for the same period in 1938.

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### Stocks of Canned Fruits and Vegetables

Stocks of canned fruits held by cannors, wholesale dealers and chain store warehouses on October 1 totalled 1,173,237 cases compared with 640,858 on July 1 and 1,492,378 on October 1, 1938. Stocks of canned vegetables amounted to 5,693,802 cases compared with 3,801,141 on July 1 and 8,823,598 on October 1, 1938.

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### Production of Tobacco

The rapid expansion in the tobacco growing industry evidenced in 1938 was continued in the 1939 season when production reached a new high of 108,770,100 pounds as compared with the revised estimate of 101,394,600 in 1938, and 72,093,400 in 1937. The total acreage planted to tobacco in 1939 is estimated at 93,035 acres as compared with 83,575 in 1938 and 69,028 in 1937. The second estimates are substantially higher than the preliminary estimates published in the September crop report. Production estimates are higher for all types, but particularly for flue-cured and Burley. The estimate of flue-cured tobacco production in Ontario in 1938 has also been revised upward as final marketing data on this crop are now available. The biggest increases over the previous year are shown in the 1939 areas planted to flue-cured tobacco in Ontario and Quebec. Increases are also evident in the Burley tobacco acreage in Ontario and the pipe types in Quebec. Decreases are shown in the acreages of cigar leaf and the dark tobaccos.

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### October External Trade

Canada's external trade showed a further gain in October, totalling \$170,471,796 compared with \$156,020,853 in September and \$153,162,860 in October, 1938. Domestic exports aggregated \$90,432,856 compared with \$81,461,185 in September and \$88,166,954 a year ago, while imports were valued at \$79,053,266 compared with \$73,564,271 in September and \$63,908,940 last year. Foreign exports amounted to \$985,674 compared with \$995,397 in September and \$1,084,974 in October, 1938.

Canada's trade balance was favourable in October to the extent of \$12,385,264 compared with \$8,892,311 in September and \$25,344,988 in October, 1938.

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### Imported Raw Rubber

A sharp increase was recorded in Canada's October imports of raw rubber, the total being 12,710,866 pounds compared with 5,581,794 in September and 7,031,956 in October, 1938. During the ten months ended October, the imports totalled 60,559,338 pounds compared with 45,643,972 in the same period last year.

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### Cheese Imports

October imports of cheese amounted to 174,271 pounds compared with 69,483 in September and 146,442 in October, 1938. The amount imported during the 10 months ended October was 962,737 pounds compared with 1,048,828 a year ago.

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### Indexes of Wholesale Sales in October

Excepting only the textile and footwear trades, sales of wholesale merchants eased off somewhat in October from the high peak reached in the preceding month but were still 20 per cent above the level of October a year ago. The general index on the 1930 base as 100, stands at 117.4, compared with 141.9 for September and 97.8 for October, 1938. Cumulative figures for the first ten months of 1939 stand seven per cent higher than for the corresponding period of 1938.





## Civil Aviation in Canada

The total investment in Canada in civil aviation as at December 31, 1938, was \$10,648,513. This amount included investments by provincial governments, light aeroplane clubs and Canadian commercial companies totalling \$8,306,864, and of the Dominion Government on airports and airways of \$2,341,649. The latter figure is for the fiscal year 1937-38, the latest available.

Passenger and freight traffic to and from the United States increased but domestic traffic showed a decrease, the total number of revenue passengers carried declining from 110,864 in 1937 to 104,117 and the freight carried declining from 26,279,156 pounds to 21,704,587. Mail carried under Canadian postal contract increased from 1,323,584 pounds to 1,771,153, and the total including mail carried under United States postal contracts and mail matter carried for individuals increased from 1,450,473 pounds to 1,901,711.

The number of licensed private pilots increased from 635 for 1937 to 734 but the total number of licensed commercial pilots, limited commercial pilots and transport pilots decreased by only one to 521. There was a shift, however, in each class. The number of licensed air engineers has been increasing each year, the number in 1938 being 643 compared with 595 in 1937.

The decrease in licensed aircraft was principally in light land planes. The number of planes with gross weight of 2,000 pounds or less decreased from 316 to 222. Those weighting between 2,001 pounds and 10,000 decreased to 232 from 279 but those over 10,000 pounds increased from 9 to 17.

National Defence aircraft were used for most of the aerial surveying, and 102,407 square miles were photographed, 58,957 square miles vertically and 43,450 square miles obliquely. Also, commercial companies reported 13,000 square miles sketched from the air.

Seventeen persons were killed during the year due to aircraft accidents and 13 were injured, including two killed and three injured in training.

A large part of commercial passenger and freight traffic is in connection with mining operations in northern districts where previously the means of transportation was canoe in the summer and dog sleigh in the winter. The numerous lakes in most of the northern mining areas provide landing surfaces in the summer for aircraft equipped with floats and in the winter for aircraft equipped with skis. In Quebec and Ontario the distances from the railways to the mines are not great, but in the western provinces and in the North West Territory some of the distances are hundreds of miles. The air line distance from Waterways on the Northern Alberta railway to the radium mines on Great Bear Lake is around 700 miles and the mail route from Fort McMurray to Aklavik at the mouth of the Mackenzie River is over 1,400 miles.

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## Summary of Farm Family Living Expenditures

Annual living expenditures for 1,692 families operating farms in all provinces of the Dominion averaged \$763 during 1938. Almost two-thirds of these families spent less than \$800 for living requirements and only 20 per cent spent over \$1,000.

Cash outlay for food and clothing formed the principal budget items, and together comprised nearly 40 per cent of the total living expenditure. The food percentage of 19.4 was low in comparison with urban standards because of the large proportion of foods furnished from the farm. Other necessities, namely, shelter, fuel, and light, accounted for almost 10 per cent, while 9 per cent went for furniture and furnishings.

Health care averaged almost 8 per cent of the total expenditure, and represented a cash amount for all families averaging nearly \$60. Transportation expenses averaged more than 7 per cent of total living costs, while life insurance premiums amounted to 6 per cent or an average outlay per family of \$47. Expenditure for recreation accounted for only 4.5 per cent of the family living costs, and expenses of household operation another 4.4 per cent. Education, welfare, gifts, and personal care constituted the remaining 12 per cent of the average family budget.

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Reports Issued During the Week

1. Trade of Canada, October (10 cents).
  2. Canadian Farm Family Living Expenditures, 1938 (15 cents).
  3. Business Conditions in First Ten Months, 1939 (10 cents).
  4. Imports of Rubber, October (10 cents).
  5. Imports of Milk and Its Products and Eggs, October (10 cents).
  6. Imports of Meats, Lard and Sausage Casings, October (10 cents).
  7. Imports and Exports of Fresh Fruits, October (10 cents).
  8. Canadian Grain Statistics (10 cents).
  9. Civil Aviation in Canada, 1938 (25 cents).
  10. Tobacco Crop Report (10 cents).
  11. Index Numbers of Wholesale Prices (10 cents).
  12. Sugar Report, October 14 to November 4, 1939 (10 cents).
  13. Coal and Coke Statistics, October (10 cents).
  14. Final Report on the Stocks of Canned Fruits and Vegetables, October 1 (10 cents).
  15. The Bed, Spring and Mattress Industry, 1938 (15 cents).
  16. The Oiled and Waterproofed Clothing Industry, 1938 (15 cents).
  17. Carloadings on Canadian Railways (10 cents).
  18. Asbestos Production, September (10 cents).
  19. Gypsum Production, September (10 cents).
  20. Gold Production, September (10 cents).
  21. Bank Debits to Individual Accounts, October (10 cents).
  22. Exports of Non-Ferrous Ores and Smelter Products, October (10 cents).
  23. Cement, Clay Products and Lime, September (10 cents).
  24. The Sporting Goods Industry in Canada, 1938 (15 cents).
  25. Preliminary Summary Statistics, Iron and Steel and Their Products, 1938 (10 cents).
  26. Indexes of Wholesale Sales, October (10 cents).
  27. Miscellaneous Metals in Canada, 1938 (15 cents).
  28. Security Prices and Foreign Exchange (10 cents).
  29. Advance Preliminary Statement of Stocks of Butter, Cheese and Eggs in Principal Cities, November 1 (10 cents).
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