

# TEXAS BUSINESS REVIEW

A MONTHLY SUMMARY OF BUSINESS AND ECONOMIC CONDITIONS IN TEXAS

Published by the Bureau of Business Research, The University of Texas  
Austin 12, Texas

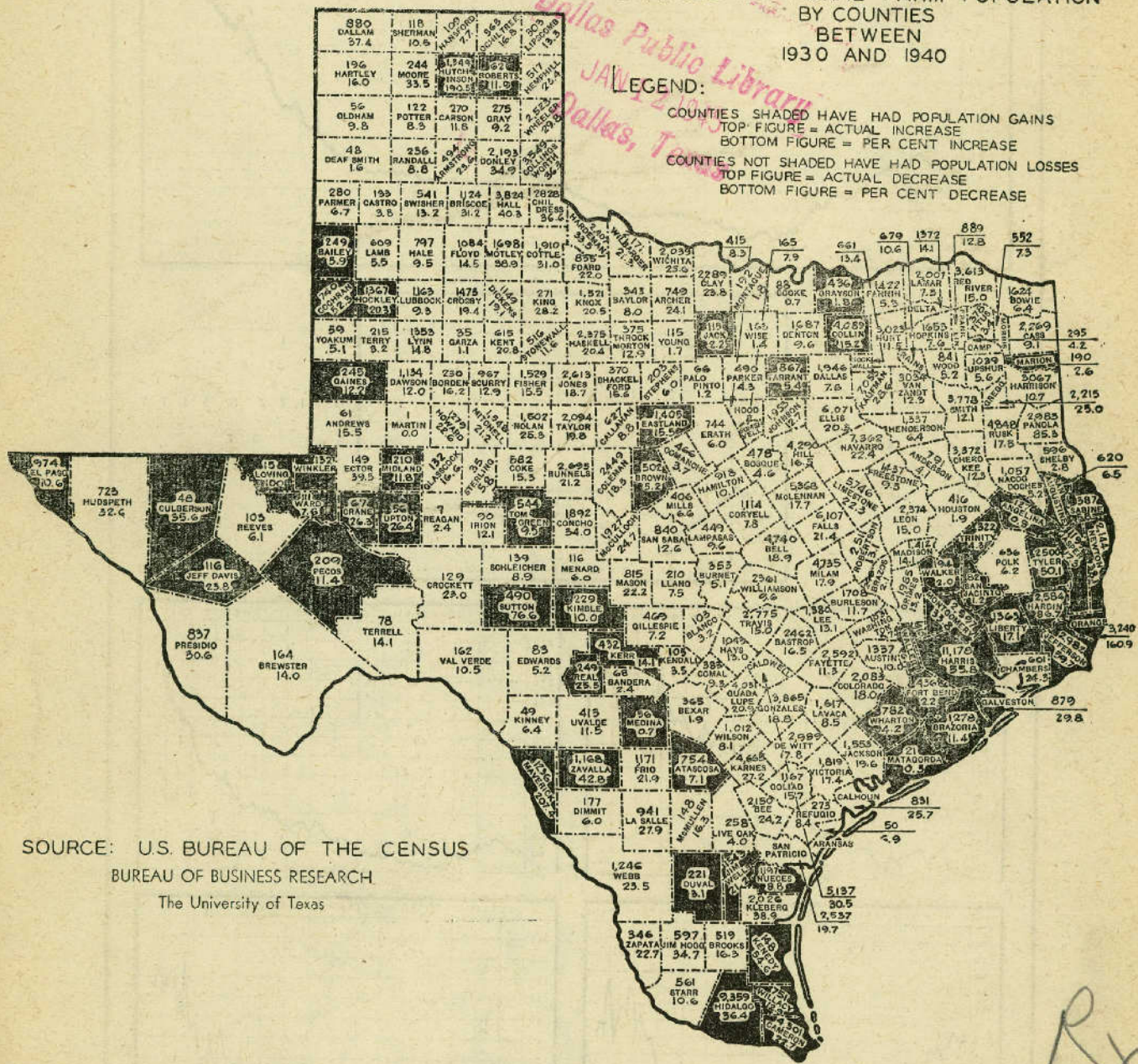
Vol. XVIII, No. 11

December, 1944

## CHANGES IN RURAL FARM POPULATION BY COUNTIES BETWEEN 1930 AND 1940

LEGEND:

COUNTIES SHADED HAVE HAD POPULATION GAINS  
TOP FIGURE = ACTUAL INCREASE  
BOTTOM FIGURE = PER CENT INCREASE  
COUNTIES NOT SHADED HAVE HAD POPULATION LOSSES  
TOP FIGURE = ACTUAL DECREASE  
BOTTOM FIGURE = PER CENT DECREASE



SOURCE: U.S. BUREAU OF THE CENSUS  
BUREAU OF BUSINESS RESEARCH  
The University of Texas

Entered as second class matter on May 7, 1928, at the post office at Austin, Texas, under Act of August 24, 1912

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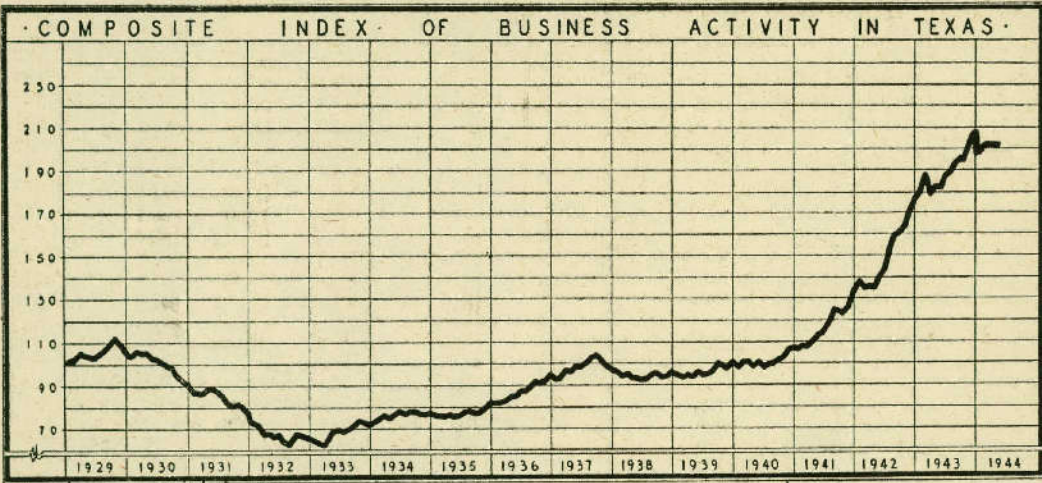
ONE DOLLAR PER YEAR

### INDEXES OF BUSINESS ACTIVITY IN TEXAS

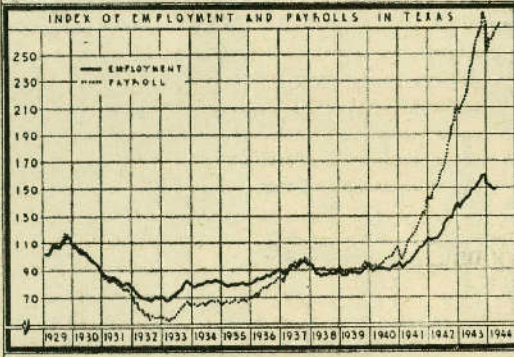
AVERAGE MONTH OF 1930 = 100%

WEIGHT IN COMPOSITE INDEX

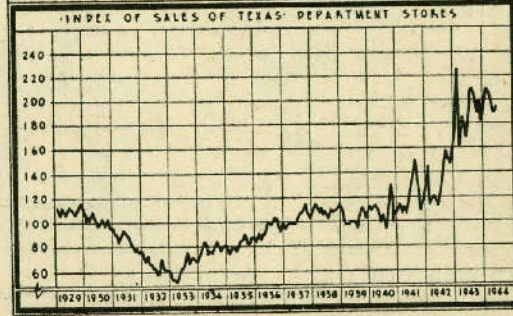
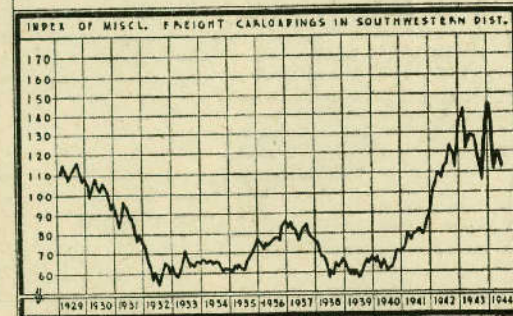
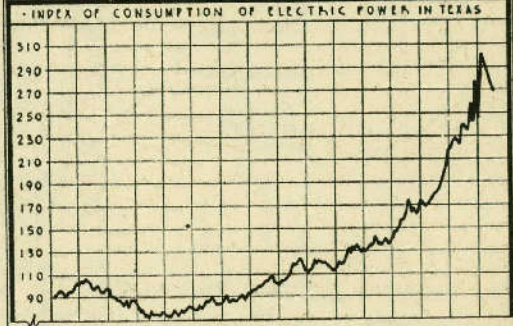
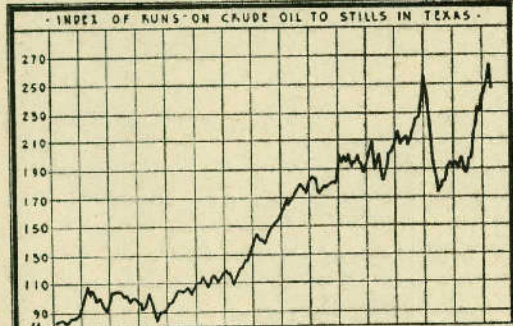
EMPLOYMENT	25%	MISCL. FREIGHT CARLOADINGS	20%
PAYROLLS	25%	CRUDE OIL RUNS	5%
DEPARTMENT STORE SALES	10%	ELECTRIC POWER CONSUMPTION	9%



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THE  
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OF  
TEXAS



**TEXAS BUSINESS REVIEW**

Published Monthly by the  
**BUREAU OF BUSINESS RESEARCH**

The University of Texas, Austin 12, Texas

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**INDEXES OF AGRICULTURAL CASH INCOME IN TEXAS**

(Average Month 1928-'32 equals 100)

Districts	Nov., 1944	Oct., 1944	Nov., 1943	Cumulative Cash Income (in Thousands of Dollars) Jan.-Nov. inclusive	
				1944	1943
1-N	231.4	186.5	225.2	125,342	104,375
1-S	330.3	364.7	267.0	107,916	102,459
2	207.3	173.0	149.8	115,397	103,989
3	284.7	166.8	257.1	53,808	47,667
4	227.0	218.1	235.3	175,582	177,765
5	191.7	53.7	177.6	59,199	81,620
6	229.0	120.1	233.6	35,880	46,025
7	217.8	128.0	236.1	68,782	68,597
8	207.4	195.4	198.4	103,390	104,514
9	514.2	304.8	463.2	80,789	83,349
10	365.2	232.0	325.9	27,218	31,036
10-A	1174.4	734.7	841.5	110,689	71,581
STATE	267.8	192.1	236.4	1,063,992	1,022,977

**TEXAS COMMERCIAL FAILURES**

	Nov. 1944	Nov. 1943	Oct. 1944
Number	0	0	0
Liabilities*	0	0	0
Assets*	0	0	0
Average Liabilities per failure*	0	0	0

\*In thousands.

Notes: From Dun and Bradstreet, Inc.

Notes: Farm cash income as computed by the Bureau understates actual farm cash income by from six to ten per cent. This situation results from the fact that means of securing complete local marketings, especially by truck, have not yet been fully developed. In addition, means have not yet been developed for computing cash income from all agricultural specialties of local importance in scattered areas throughout the State. This situation, however, does not impair the accuracy of the indexes to any appreciable extent.

**NOVEMBER RETAIL SALES OF INDEPENDENT STORES IN TEXAS**

	Number of Establishments Reporting	Percentage Changes in Dollar Sales		Year 1944 from Year 1943
		Nov. 1944 from Nov. 1943	Nov. 1944 from Oct. 1944	
<b>TOTAL TEXAS</b>	960	+ 12.4	+ 4.7	+ 11.1
<b>STORES GROUPED BY LINE OF GOODS CARRIED:</b>				
<b>APPAREL</b>				
Family Clothing Stores	24	+ 7.1	+ 9.3	+ 7.3
Men's and Boys' Clothing Stores	29	+ 9.4	+ 9.4	+ 5.9
Shoe Stores	15	+ 25.6	+ 7.7	+ 7.8
Women's Specialty Shops	38	+ 16.2	- 11.9	+ 18.7
<b>AUTOMOTIVE*</b>	83	+ 7.4	- 1.6	+ 6.4
Motor Vehicle Dealers	73	+ 7.6	- 2.4	+ 6.5
<b>COUNTRY GENERAL</b>	90	+ 10.3	+ 0.5	+ 9.5
<b>DEPARTMENT STORES</b>	62	+ 15.3	+ 12.0	+ 13.6
<b>DRUG STORES</b>	104	+ 10.7	- 4.8	+ 11.5
<b>DRY GOODS AND GENERAL MERCHANDISE</b>	32	+ 11.0	+ 7.1	+ 7.6
<b>FILLING STATIONS</b>	23	+ 0.6	- 5.3	+ 5.8
<b>FLORISTS</b>	18	+ 27.6	+ 5.7	+ 27.9
<b>FOOD*</b>	126	+ 16.1	+ 3.7	+ 11.9
Grocery Stores	31	+ 3.9	- 1.6	+ 6.5
Grocery and Meat Stores	87	+ 17.6	+ 4.5	+ 13.1
<b>FURNITURE AND HOUSEHOLD*</b>	72	+ 16.9	+ 7.8	+ 2.8
Furniture Stores	64	+ 16.7	+ 7.4	+ 4.1
<b>JEWELRY</b>	25	- 11.2	+ 18.5	- 2.4
<b>LUMBER, BUILDING, AND HARDWARE*</b>	170	- 0.7	- 0.5	+ 4.6
Farm Implement Dealers	15	+ 8.5	- 6.5	+ 24.2
Hardware Stores	53	- 2.5	+ 14.9	+ 16.3
Lumber and Building Material Dealers	99	- 1.1	- 7.2	- 1.4
<b>RESTAURANTS</b>	35	+ 8.1	- 7.0	+ 10.9
<b>ALL OTHER STORES</b>	9	- 9.0	- 4.7	+ 4.5
<b>TEXAS STORES GROUPED ACCORDING TO POPULATION OF CITY:</b>				
<b>All Stores in Cities of—</b>				
Over 100,000 Population	161	+ 14.0	+ 4.2	+ 13.3
50,000-100,000 Population	130	+ 16.7	- 9.5	+ 10.0
2,500-50,000 Population	446	+ 8.9	+ 1.6	+ 8.3
Less than 2,500 Population	223	- 2.3	+ 4.8	+ 9.3

\*Group total includes kinds of business other than the classification listed.

Prepared from reports of independent retail stores to the Bureau of Business Research, co-operating with the U.S. Bureau of the Census.

# TEXAS BUSINESS REVIEW

## EMPLOYMENT AND PAY ROLLS IN TEXAS

November, 1944

	Estimated Number of Workers Employed*		Percentage Change		Estimated Amount of Weekly Pay Roll		Percentage Change	
	Oct., 1944 <sup>(1)</sup>	Nov., 1944 <sup>(2)</sup>	from Oct., 1944	from Nov., 1943	Oct., 1944 <sup>(1)</sup>	Nov., 1944 <sup>(2)</sup>	from Oct., 1944	from Nov., 1943
<b>MANUFACTURING</b>								
<b>All Manufacturing Industries</b>	170,233†	171,051†	+ 0.5	+ 1.5	\$6,284,330	\$6,109,149	- 2.8	+ 12.0
<i>Food Products</i>								
Baking	10,700	10,551	- 1.4	+ 22.1	406,188	406,977	+ 0.2	+ 53.3
Carbonated Beverages	3,675	3,513	- 4.4	- 8.3	111,360	103,886	- 6.7	- 6.9
Confectionery	1,536	1,717	+ 11.8	+ 5.9	20,793	24,333	+ 17.0	+ 12.8
Flour Milling	2,164	2,233	+ 3.2	- 1.5	74,694	74,632	- 0.1	+ 14.5
Ice Cream	1,502	1,406	- 6.4	+ 10.4	43,486	41,181	- 5.3	+ 24.7
Meat Packing	6,337	6,184	- 2.4	- 11.0	218,504	216,359	- 1.0	- 17.4
<i>Textiles</i>								
Cotton Textile Mills	4,979	4,970	- 0.2	- 11.4	120,637	119,814	- 0.7	- 7.7
Men's Work Clothing	4,004	4,017	+ 0.3	- 5.0	73,879	73,299	- 0.8	- 6.9
<i>Forest Products</i>								
Furniture	1,182	1,305	+ 10.3	- 32.6	34,082	37,326	+ 9.5	- 22.5
Planing Mills	1,704	1,724	+ 1.1	- 16.9	55,016	55,736	+ 1.3	- 2.1
Saw Mills	14,716	14,617	- 0.7	- 8.3	291,951	267,064	- 8.5	- 8.6
Paper Boxes	926	935	+ 0.9	- 6.1	23,119	21,688	- 6.2	- 8.6
<i>Printing and Publishing</i>								
Commercial Printing	2,287	2,280	- 0.3	- 4.0	82,591	83,325	+ 0.9	+ 5.4
Newspaper Publishing	3,865	3,873	+ 0.2	- 4.0	119,283	123,567	+ 3.6	+ 4.6
<i>Chemical Products</i>								
Cotton Oil Mills	2,743	3,342	+ 21.7	- 18.6	49,785	61,412	+ 23.3	- 12.8
Petroleum Refining	25,089	25,109	+ 0.1	+ 8.6	1,549,557	1,466,124	- 5.4	+ 12.1
<i>Stone and Clay Products</i>								
Brick and Tile	1,481	1,656	+ 11.8	+ 7.1	28,020	28,959	+ 3.4	+ 10.9
Cement	717	718	+ 0.3	- 32.7	30,253	28,700	- 5.1	- 27.6
<i>Iron and Steel Products</i>								
Structural and Ornamental Iron	2,394	2,320	- 3.1	- 13.0	81,866	83,419	+ 1.9	+ 5.2
<b>NONMANUFACTURING</b>								
Crude Petroleum Production	28,156	27,954	- 0.7	+ 8.1	1,568,019	1,591,326	+ 1.5	+ 16.2
Quarrying	(3)	(3)	- 0.1	- 6.3	(3)	(3)	- 2.3	+ 2.0
Public Utilities	(3)	(3)	+ 0.7	+ 0.5	(3)	(3)	+ 2.2	- 1.2
Retail Trade	217,859	225,668	+ 3.6	- 8.2	5,447,609	5,579,288	+ 2.4	- 2.1
Wholesale Trade	60,921	61,978	+ 1.7	+ 0.2	2,508,536	2,493,919	- 0.6	+ 8.3
Dyeing and Cleaning	2,892	2,831	- 2.1	+ 0.7	68,775	69,888	+ 1.6	+ 15.1
Hotels	19,218	19,520	+ 1.6	+ 3.1	353,010	362,249	+ 2.6	+ 14.0
Power Laundries	13,737	13,612	- 0.9	+ 0.2	250,460	245,203	- 2.1	+ 5.0

### CHANGES IN EMPLOYMENT AND PAY ROLLS IN SELECTED CITIES<sup>(4)</sup>

	Employment Percentage Change		Pay Rolls Percentage Change		Employment Percentage Change		Pay Rolls Percentage Change		
	Oct., 1944	Nov., 1943	Oct., 1944	Nov., 1943	Oct., 1944	Nov., 1943	Oct., 1944	Nov., 1943	
	to Nov., 1944	to Nov., 1944	to Nov., 1944	to Nov., 1944	to Nov., 1944	to Nov., 1944	to Nov., 1944	to Nov., 1944	
Abilene	+ 5.3	- 3.7	+ 7.1	+ 15.2	Galveston	+ 6.1	- 18.2	+ 19.2	- 10.0
Amarillo	- 0.5	- 2.0	(5)	- 1.8	Houston	+ 1.1	- 14.7	+ 0.4	+ 3.2
Austin	+ 4.0	- 0.2	+ 0.1	+ 3.5	Port Arthur	+ 1.6	+ 8.9	- 3.0	+ 13.6
Beaumont	+ 0.2	+ 4.4	+ 0.7	- 2.7	San Antonio	+ 1.1	- 5.1	+ 0.4	- 1.3
Dallas	- 5.7	- 6.3	- 3.3	+ 6.0	Sherman	+ 1.8	+ 33.1	- 0.5	+ 48.5
El Paso	+ 0.5	+ 6.3	- 0.8	+ 13.4	Waco	+ 2.0	- 2.4	- 0.9	+ 6.2
Fort Worth	+ 0.7	- 25.3	- 0.1	- 18.2	Wichita Falls	+ 3.6	- 3.5	- 7.1	- 10.1
Corpus Christi	- 2.6	(3)	- 7.4	(3)	STATE	+ 0.2	- 9.1	- 0.1	- 5.9

### ESTIMATED NUMBER OF EMPLOYEES IN NONAGRICULTURAL BUSINESS AND GOVERNMENT ESTABLISHMENTS<sup>(5)</sup>

	1942 <sup>(6)</sup>	1943 <sup>(6)</sup>	1944	1942 <sup>(1)</sup>	1943	1944
January	1,170,000	1,385,000	1,429,000 <sup>(2)</sup>	1,317,000	1,450,000 <sup>(2)</sup>	1,448,000 <sup>(3)</sup>
February	1,199,000	1,397,000	1,433,000 <sup>(2)</sup>	1,352,000	1,441,000 <sup>(2)</sup>	1,446,000 <sup>(2)</sup>
March	1,226,000	1,415,000	1,433,000 <sup>(2)</sup>	1,373,000	1,448,000 <sup>(2)</sup>	1,438,000 <sup>(2)</sup>
April	1,222,000	1,433,000	1,435,000 <sup>(2)</sup>	1,384,000	1,455,000 <sup>(2)</sup>	
May	1,251,000	1,458,000	1,435,000 <sup>(2)</sup>	1,389,000	1,461,000 <sup>(2)</sup>	
June	1,291,000	1,478,000	1,448,000 <sup>(2)</sup>	1,413,700	1,470,000 <sup>(3)</sup>	
July						
August						
September						
October						
November						
December						

<sup>(1)</sup>Does not include proprietors, firm members, officers of corporations, or other principal executives. Factory employment excludes also office, sales, technical and professional personnel.

<sup>(2)</sup>Does not include strictly war industries.

<sup>(3)</sup>Revised.

<sup>(4)</sup>Subject to revision.

<sup>(5)</sup>Not available.

<sup>(6)</sup>Based on unweighted figures.

<sup>(7)</sup>Less than 1/10 of one percent.

Not including self-employed persons, casual workers, or domestic servants, and exclusive of military and maritime personnel. These figures are furnished by the Bureau of Labor Statistics, U.S. Department of Labor.

Prepared from reports from representative Texas establishments to the Bureau of Business Research co-operating with the Bureau of Labor Statistics. Due to the national emergency, publication of data for certain industries is being withheld until further notice.

POSTAL RECEIPTS

	Nov. 1944	Nov. 1943	Oct. 1944
Abilene	\$ 48,293	\$ 39,500	\$ 54,104
Amarillo	59,942	53,382	67,070
Austin	111,646	82,261	113,691
Beaumont	52,931	45,043	58,495
Big Spring	11,518	8,912	14,868
Brownsville	11,736	10,114	14,851
Brownwood	27,270	22,788	34,213
Childress	7,813	7,004	7,680
Cleburne	6,005	5,143	8,167
Coleman	4,754	4,059	5,722
Corpus Christi	69,823	60,083	82,613
Corsicana	10,620	10,292	11,794
Dallas	622,341	504,883	647,593
Del Rio	6,329	5,548	8,438
Denison	11,003	9,348	12,915
Denton	11,685	10,667	16,087
Edinburg	4,683	3,787	6,436
El Paso	95,035	95,074	122,249
Fort Worth	287,619	258,519	317,905
Galveston	50,330	49,752	62,598
Gladewater	4,631	3,722	5,834
Harlingen	14,206	12,593	17,251
Houston	414,558	338,720	455,486
Jacksonville	4,718	4,039	6,810
Kenedy	1,857	2,064	2,860
Kerrville	4,168	3,402	5,706
Lubbock	40,127	32,544	49,875
Lufkin	7,255	7,335	10,047
McAllen	8,245	6,363	9,908
Marshall	10,758	9,193	14,901
Palestine	7,577	7,279	11,048
Pampa	10,710	8,955	14,714
Paris	23,481	19,369	23,126
Plainview	7,005	5,259	7,860
Port Arthur	26,846	25,703	33,209
San Angelo	22,938	19,837	29,082
San Antonio	260,668	249,149	298,934
Sherman	13,015	10,862	16,787
Snyder	2,638	2,104	3,344
Sweetwater	7,336	6,494	9,642
Temple	16,106	14,924	19,278
Tyler	31,200	31,088	39,249
Waco	53,243	47,009	68,553
Wichita Falls	44,666	10,665	50,284
<b>TOTAL</b>	<b>\$2,549,328</b>	<b>\$2,204,781</b>	<b>\$2,871,577</b>

Note: Compiled from reports from Texas chambers of commerce to the Bureau of Business Research.

BUILDING PERMITS

	Nov. 1944	Nov. 1943	Oct. 1944
Abilene	\$ 4,015	\$ 27,045	\$ 4,750
Amarillo	147,200	8,530	62,842
Austin	61,844	33,698	81,961
Beaumont	48,048	73,613	83,047
Big Spring	31,190	7,125	26,295
Brownsville	19,540	10,807	8,176
Coleman	0	14,000	400
Corpus Christi	152,370	78,010	287,834
Corsicana	12,890*	1,780*	0
Dallas	386,032	966,624	457,399
Denton	1,300	1,300	3,875
Edinburg	2,065	2,008	736
El Paso	48,167	36,041	132,872
Fort Worth	276,192	561,875	329,476
Galveston	24,542	90,361	76,076
Gladewater	5,100	1,000	3,950
Graham	4,380	3,003	9,000
Harlingen	6,450	1,775	11,025
Houston	459,310	364,035	1,145,470
Jacksonville	100	250	9,000
Kenedy	0	300	0
Kerrville	8,125	1,865	5,735
Lubbock	78,741	25,071	88,521
McAllen	17,850	13,705	11,395
Marshall	12,529	6,578	9,384
Midland	58,150	700	32,350
New Braunfels	7,465	1,905	4,945
Palestine	1,305	9,180	4,150
Pampa	3,900	213,535	4,271
Paris	3,725	20,100	10,255
Plainview	8,200	3,650	19,895
Port Arthur	20,360	18,400	20,753
San Antonio	408,768	152,095	713,912
Seguin	1,088	1,831	6,550
Sherman	10,365	9,520	11,576
Snyder	0	0	0
Sweetwater	110,610	3,055	14,820
Tyler	21,900	11,597	35,157
Waco	48,200	66,300	20,834
Wichita Falls	24,404	10,665	15,970
<b>TOTAL</b>	<b>\$2,523,530</b>	<b>\$2,838,602</b>	<b>\$3,764,657</b>

\*Not included in total.

Note: Compiled from reports from Texas chambers of commerce to the Bureau of Business Research.

TEXAS CHARTERS

	Nov. 1944	Nov. 1943	Oct. 1944
<b>Domestic Corporations:</b>			
Capitalization*	\$909	\$696	\$886
Number	59	57	57
<b>Classification of new corporations:</b>			
Banking-Finance	0	0	1
Manufacturing	6	6	6
Merchandising	26	16	17
Oil	6	3	2
Public Service	0	1	0
Real Estate-Building	7	9	8
Transportation	4	1	3
All Others	10	21	20
Number capitalized at less than \$5,000	24	17	11
Number capitalized at \$100,000 or more	1	2	0
<b>Foreign Corporations (Number)</b>	<b>2</b>	<b>15</b>	<b>15</b>

\*In thousands.

Note: Compiled from records of the Secretary of State.

LUMBER

(In Board Feet)

	Nov. 1944	Nov. 1943	Oct. 1944
<b>Southern Pine Mills:</b>			
Average Weekly Production per unit	186,196	272,236	194,565
Average Weekly Shipments per unit	193,555	228,508	197,845
Average Unfilled Orders per unit, end of month	1,214,233	16,151,860	1,481,767

Note: From Southern Pine Association.

PERCENTAGE CHANGES IN CONSUMPTION OF ELECTRIC POWER

	Nov., 1944 from Nov., 1943	Nov., 1944 from Oct., 1944
Commercial	+ 11.9	- 5.2
Industrial	+ 19.5	- 1.5
Residential	+ 12.1	- 2.3
All Others	- 38.4	+ 2.3
<b>TOTAL</b>	<b>+ 3.4</b>	<b>- 2.3</b>

Prepared from reports of 10 electric power companies to the Bureau of Business Research.

## DAIRY PRODUCTS MANUFACTURED IN PLANTS IN TEXAS

Product and Year	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
<b>CREAMERY BUTTER</b> (1000 lb.)													
1944*	2,043	2,126	2,765	3,535	4,008	3,527	3,569	2,792	2,535	2,138	1,534		
1943*	2,636	2,743	3,076	3,652	4,544	4,120	4,363	3,584	2,621	2,582	2,210	1,924	38,071
1930-39 average	2,074	2,109	2,392	3,138	3,556	3,166	4,113	2,867	2,513	2,608	2,301	2,211	32,048
<b>ICE CREAM (1000 gal.)†</b>													
1944*	1,115	1,211	1,520	1,687	2,491	2,944	3,200	2,997	2,193	1,897	1,689		
1943*	1,125	1,187	1,396	1,770	2,302	2,478	2,778	2,898	2,125	1,744	1,398	940	22,237
1930-39 average	215	262	434	570	752	893	904	845	686	460	259	205	6,486
<b>AMERICAN CHEESE</b> (1000 lb.)													
1944*	902	956	1,229	1,884	2,273	2,159	2,076	1,621	1,372	1,148	869		
1943*	914	948	1,063	1,594	2,010	1,866	1,782	1,319	984	786	625	809	15,272
1930-39 average	554	590	737	1,050	1,215	1,129	1,119	1,025	866	852	718	641	10,496
<b>MILK EQUIVALENT OF DAIRY PRODUCTS‡</b> (1000 lb.)													
1944*	67,873	71,519	92,663	119,889	144,977	137,502	140,357	115,184	97,137	82,777	63,610		
1943*	80,106	83,301	94,470	118,447	149,577	139,948	147,397	126,028	92,753	84,922	70,334	62,253	1,291,709
1930-39 average	54,675	57,139	67,456	89,641	104,323	97,562	97,075	89,185	76,165	73,444	60,119	55,872	922,656

\*Estimates of production made by the Bureau of Business Research.

†Milk Equivalent of Dairy products was calculated from production data by the Bureau of Business Research.

‡Includes ice cream, sherbets, ices, etc.

Note: 10-year average production on creamery butter, ice cream and American cheese based on data from the Agricultural Marketing Service, U.S.D.A.

## NOVEMBER, 1944, CARLOAD MOVEMENT OF POULTRY AND EGGS

## Shipments from Texas Stations

*Destination	Cars of Poultry						Cars of Eggs					
	Chickens		Turkeys		Shell		Frozen		Dried		Shell Equivalent†	
	1944	1943	1944	1943	1944	1943	1944	1943	1944	1943		
TOTAL	19	2	256	263	14	22	68	45	93	158	894	1,376
Intrastate	3	0	42	59	8	9	26	26	13	27	164	277
Interstate	16	8	214	204	6	13	42	19	80	131	730	1,099
Receipts at Texas Stations												
TOTAL	19	5	18	28	43	79	61	29	---	22	165	313
Intrastate	13	2	14	26	7	20	24	27	---	20	55	234
Interstate	6	3	4	2	36	59	37	2	---	2	110	79

\*The destination above is the first destination as shown by the original waybill. Changes in destination brought about by diversion factors are not shown.

†Dried eggs and frozen eggs are converted to a shell egg equivalent on the following basis: 1 rail carload of dried eggs=8 carloads of shell eggs, and 1 carload of frozen eggs=2 carloads of shell eggs.

Note: These data furnished to the Division of Agricultural Statistics, U.S. E., by railroad officials through agents at all stations which originate and receive carload shipments of poultry and eggs. The data are compiled by the Bureau of Business Research.

## NOVEMBER SHIPMENTS OF LIVE STOCK CONVERTED TO A RAIL-CAR BASIS\*

	Cattle		Calves		Swine		Sheep		Total	
	1944	1943	1944	1943	1944	1943	1944	1943	1944	1943
Total Interstate Plus Fort Worth	6,922	6,633	2,403	1,767	479	1,208	735	984	10,539	10,592
Total Intrastate Omitting Fort Worth	1,488	946	242	90	18	65	311	176	2,059	1,277
TOTAL SHIPMENTS	8,410	7,579	2,645	1,857	497	1,273	1,046	1,160	12,598	11,869

## TEXAS CAT-LOT SHIPMENTS OF LIVE STOCK FOR YEAR TO DATE

	Cattle		Calves		Swine		Sheep		Total	
	1944	1943	1944	1943	1944	1943	1944	1943	1944	1943
Total Interstate Plus Fort Worth	59,159	59,497	12,996	10,752	13,283	15,234	13,390	12,828	98,828	98,311
Total Intrastate Omitting Fort Worth	8,128	7,863	1,611	1,870	819	731	2,472	1,326	13,030	11,790
TOTAL SHIPMENTS	67,287	67,360	14,607	12,622	14,102	15,965	15,862	14,154	111,858	110,101

\*Rail-car Basis: Cattle, 30 head per car; calves, 60; swine, 80; and sheep, 250.

Fort Worth shipments are combined with interstate forwardings in order that the bulk of market disappearance for the month may be shown.

Note: These data are furnished the United States Bureau of Agricultural Economics by railway officials through more than 1,500 station agents, representing every livestock shipping point in the State. The data are compiled by the Bureau of Business Research.

NOVEMBER RETAIL SALES OF INDEPENDENT STORES  
IN TEXAS

(By Districts)

	Number of Estab- lishments Reporting	Percentage Changes		
		Nov. 1944 from Nov. 1943	Nov. 1944 from Oct. 1944	Year 1944 from Year 1943
TOTAL TEXAS	960	+12.4	+4.7	+11.1
TEXAS STORES GROUPED BY PRODUCING AREAS				
District 1-N	63	+29.5	+12.8	+13.3
Amarillo	24	+47.4	+30.5	
Plainview	11	+4.2	-2.6	
All Others	28	+12.4	-7.7	
District 1-S	32	+11.1	+8.6	+11.2
Lubbock	17	+7.9	+8.0	
All Others	15	+19.5	+10.2	
District 2	81	+5.6	+5.3	*
District 3	28	+17.5	+4.3	+13.3
District 4	225	+12.4	+3.5	+13.5
Dallas	34	+15.0	-1.8	
Fort Worth	35	+11.1	+13.2	
Waco	25	+15.6	+11.7	
All Others	130	+2.1	+7.7	
District 5	104	+11.3	-3.2	+9.9
District 6	34	+19.7	+8.6	+16.1
District 7	42	+10.7	*	+15.5
District 8	175	+17.2	+7.3	+17.2
Austin	17	+13.8	+9.7	
Corpus Christi	27	+18.2	+3.7	
San Antonio	48	+20.0	+10.3	
All Others	83	+7.0	-3.7	
District 9	109	+7.5	+4.3	+8.5
Houston	44	+9.6	+4.2	
All Others	65	+3.4	+4.6	
District 10	26	+5.6	+8.2	+14.2
District 10-A	41	-6.8	+1.8	+10.9

\*Change of less than .5%

NOTE: Prepared from reports of independent retail stores to the Bureau of Business Research, cooperating with the U.S. Bureau of the Census.

COMMODITY PRICES

	Nov. 1944	Nov. 1943	Oct. 1944
Wholesale Prices:			
U.S. Bureau of Labor Statistics (1926=100%)	104.4	102.9	104.0
Farm Prices:			
U.S. Bureau of Labor Statistics (1926=100%)	124.4*	121.4	123.4
Retail Prices:			
Food (U.S. Bureau of Labor Statistics (1935-1939=100%))	136.5	137.3	136.4
Cost of Living Index (1935-1939 =100%)	126.5	124.2	126.4
Department Stores (Fairchild's Publications January, 1931=100%)	113.4	113.1	113.4

\*Preliminary.

CEMENT

(In Thousands of Barrels)

	Oct. 1944	Oct. 1943	Sept. 1944
Texas Plants			
Production	520	788	597
Shipments	579	723	527
Stocks	848	883	907
United States			
Production	9,194	11,189	8,746
Shipments	10,263	11,188	10,221
Stocks	16,075	19,604	17,000
Capacity Operated	45.0%	53.0%	44.0%

NOTE: From U.S. Department of Interior, Bureau of Mines.

NOVEMBER CREDIT RATIOS IN TEXAS DEPARTMENT AND APPAREL STORES

(Expressed in Per Cent)

	Number of Stores Reporting	Ratio of Credit Sales to Net Sales		Ratio of Collections to Outstandings		Ratio of Credit Salaries to Credit Sales	
		1944	1943	1944	1943	1944	1943
All Stores	58	45.6	44.7	69.0	66.1	0.9	1.0
Stores Grouped by Cities:							
Austin	6	39.5	39.9	74.4	75.3	1.0	1.0
Bryan	3	41.4	37.3	55.1	53.6	0.9	1.5
Corpus Christi	3	40.4	41.1	85.5	68.3	1.9	1.1
Dallas	8	57.4	53.0	65.6	62.9	0.6	0.7
El Paso	3	39.9	40.1	68.8	67.5	1.0	1.1
Fort Worth	4	42.0	41.1	80.9	71.3	1.0	1.0
Houston	7	41.9	42.2	65.9	63.5	1.1	1.3
San Antonio	4	35.8	39.0	69.4	69.0	1.1	1.5
Waco	5	44.6	44.6	68.7	63.7	1.0	1.1
All Others	15	41.1	42.1	70.7	73.4	0.9	0.7
Stores Grouped According to Type of Store:							
Department Store (Annual Volume Over \$500,000)	19	43.2	43.3	71.2	68.0	0.9	1.0
Department Stores (Annual Volume under \$500,000)	9	37.6	40.0	63.1	67.4	1.2	1.1
Dry-Goods-Apparel Stores	3	38.6	38.2	66.9	58.1	1.6	1.6
Women's Specialty Shops	15	58.0	52.0	63.8	61.2	0.6	0.7
Men's Clothing Stores	12	40.5	41.6	71.0	67.1	1.0	1.1
Stores Grouped According to Volume of Net Sales During 1943:							
Over \$2,500,000	18	44.2	44.3	68.8	67.4	0.9	0.9
\$2,500,000 down to \$1,000,000	11	35.3	38.0	74.1	71.0	1.3	1.2
\$1,000,000 down to \$500,000	12	36.7	45.2	67.0	68.5	1.1	1.2
Less than \$500,000	17	30.0	30.1	64.2	64.5	2.1	2.2

NOTE: The ratios shown for each year, in the order in which they appear from left to right are obtained by the following computations: (1) Credit Sales divided by Net Sales. (2) Collections during the month divided by the total accounts unpaid on the first of the month. (3) Salaries of the credit department divided by credit sales. The data are reported to the Bureau of Business Research by Texas retail stores.

PETROLEUM

Daily Average Production (In Barrels)

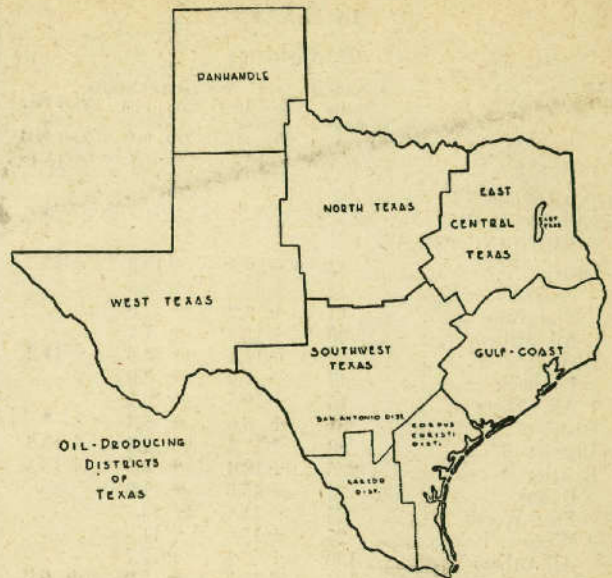
	Nov. 1944	Nov. 1943	Oct. 1944
Coastal Texas*	551,700	524,600	537,700
East Central Texas	145,150	139,200	149,500
East Texas	368,250	376,400	371,350
North Texas	150,950	141,900	148,800
Panhandle	94,650	85,500	98,800
Southwest Texas	345,750	298,050	334,400
West Texas	476,000	359,750	492,800
STATE	2,132,450	1,925,400	2,133,350
UNITED STATES	4,730,500	4,413,450	4,725,950

\*Includes Conroe.

NOTE: From American Petroleum Institute. See accompanying map showing the oil producing districts of Texas.

Gasoline sales as indicated by taxes collected by the State Comptroller were: October, 1944, 109,452,159 gal.; October, 1943, 102,641,255 gal.; September, 1944, 111,519,573 gal.

October sales of gasoline to the United States Government as recorded by motor fuel distributors in Texas were 274,968,135 gallons.



COTTON BALANCE SHEET FOR THE UNITED STATES AS OF DECEMBER 1, 1944

(In Thousands of Running Bales Except as Noted)

Year	Carryover Aug. 1	Imports to Dec. 1*	Gov. Est. as of Dec. 1	Total	Con. to Dec. 1	Exports to Dec. 1	Total	Balance Dec. 1
1935-1936	7,138	30	10,734	17,902	1,924	2,575	4,499	13,403
1936-1937	5,397	41	12,407	17,845	2,482	2,303	4,785	13,060
1937-1938	4,498	31	18,746	23,275	2,212	2,434	4,646	18,629
1938-1939	11,533	54	12,008	23,595	2,236	1,535	3,771	19,824
1939-1940	13,033	48	11,792	24,873	2,660	2,328	4,988	19,885
1940-1941	10,596	42	12,686	23,324	2,801	495	3,296	20,028
1941-1942	12,367	†	10,976	23,343	3,553	†	3,553	19,790
1942-1943	10,590	†	12,982	23,572	3,777	†	3,777	19,795
1943-1944	10,687	†	11,478	22,165	3,472	†	3,472	18,693
1944-1945	10,727	65	12,359	23,151	3,266	650	3,916	19,235

The Cotton Year begins August 1.

\*Figures are in 500-pound bales.

†Not available.

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