

TEXAS BUSINESS REVIEW

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The University of Texas

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Bureau of Business Research, The University of Texas, Austin, Texas

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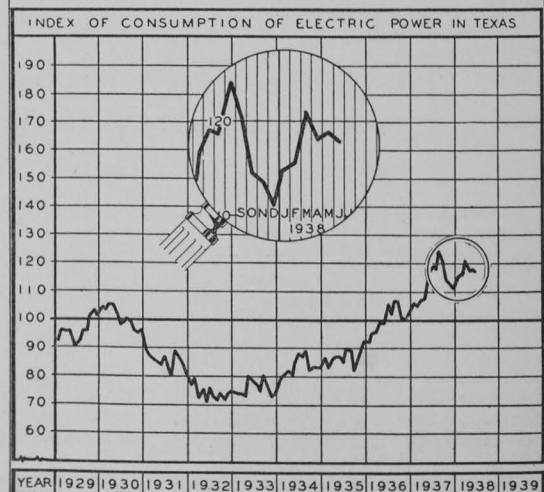
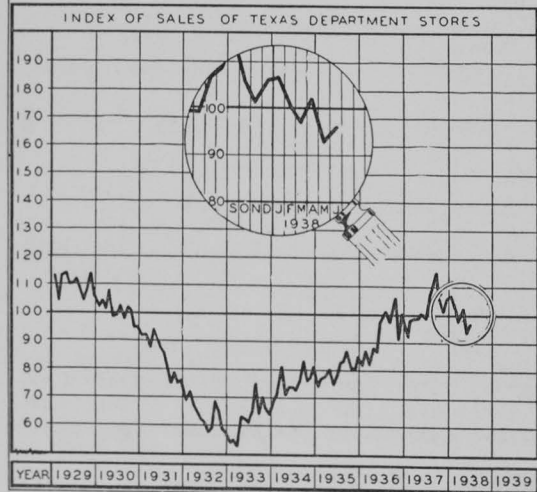
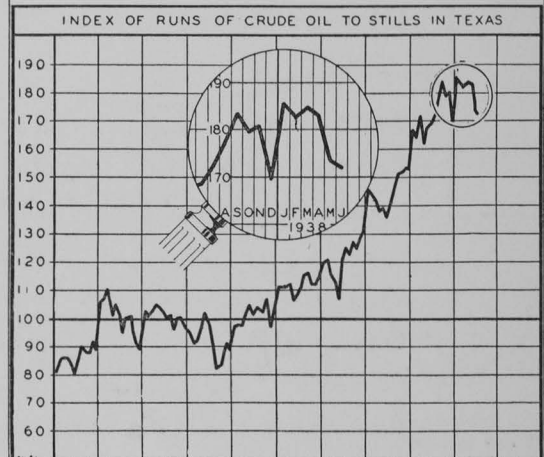
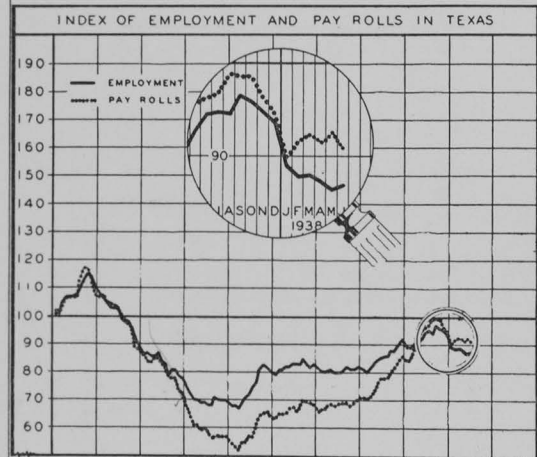
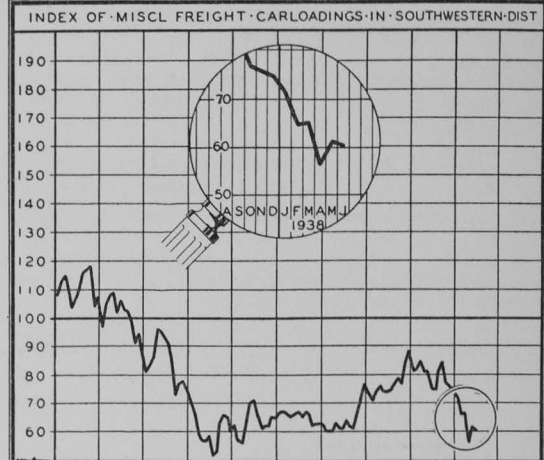
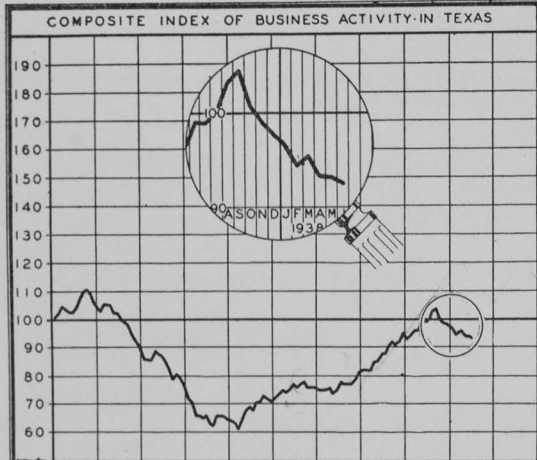
INDEXES OF BUSINESS ACTIVITY IN TEXAS

AVERAGE MONTH OF 1930 = 100 %

WEIGHT IN COMPOSITE INDEX
 EMPLOYMENT — 25%
 PAY ROLLS — 25%
 DEPARTMENT STORE SALES — 10%
 FREIGHT CARLOADINGS — 20%
 CRUDE OIL RUNS — 5%
 ELECTRIC POWER CONSUMPTION — 15%

Bureau of Business Research

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YEAR 1929 1930 1931 1932 1933 1934 1935 1936 1937 1938 1939

YEAR 1929 1930 1931 1932 1933 1934 1935 1936 1937 1938 1939

PETROLEUM

Daily Average Production

(In Barrels)

	June 1938	June 1937	May 1938
Coastal Texas†	188,040	197,600	196,000
East Central Texas	91,190	121,900	99,300
East Texas	363,780	465,250	398,200
North Texas	71,110	72,400	74,950
Panhandle	62,310	82,400	66,650
Southwest Texas	205,220	232,950	218,900
West Central Texas	28,040	33,300	28,200
West Texas	180,330	197,500	189,200
STATE	1,190,020	1,403,300	1,270,400
UNITED STATES	3,103,840	3,520,550	3,254,750
Imports	135,886	185,286	139,821

†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: May, 1938, 105,421,000 gallons; May, 1937, 103,736,000 gallons; April, 1938, 97,708,000 gallons.



COMMODITY PRICES

	June 1938	June 1937	May 1938
WHOLESALE PRICES:			
U. S. Bureau of Labor Statistics (1926 = 100)	78.3	87.2	78.1
The Annalist (1926 = 100)	80.4	93.2	80.5
FARM PRICES:			
U. S. Department of Agriculture (1910-14 = 100)	92.0	124.0	92.0
U. S. Bureau of Labor Statistics (1926 = 100)	68.7	88.5	67.5
RETAIL PRICES:			
Food (U.S. Bureau of Labor Statistics, 1923-25 = 100)	80.2*	86.3	79.1
Department Stores (Fairchild's Publications, Jan. 1931 = 100)	89.2	96.0	89.5

*Preliminary.

STOCK PRICES

	June 1938	June 1937	May 1938
Standard Indexes of the Securities Markets:			
419 Stocks Combined	73.1	113.6	73.9
347 Industrials	86.4	134.0	87.4
32 Rails	20.5	53.9	21.8
40 Utilities	69.2	91.3	69.5

NOTE: From Standard Statistics Co., Inc.

CEMENT

(In Thousands of Barrels)

	June 1938	June 1937	May 1938	First Half 1938	First Half 1937
Texas Plants					
Production	611	610	717	3,521	3,368
Shipments	664	608	612	3,564	3,411
Stocks	905*	689	958	—	—
United States					
Production	10,535	11,163	10,361	43,208	54,025
Shipments	10,932	12,649	9,752	45,586	52,524
Stocks	22,478*	24,011	22,875†	—	—
Capacity Operated	49.8%	52.8%	47.4%	—	—

*Preliminary.

†Revised.

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

JUNE SHIPMENTS OF LIVE STOCK CONVERTED TO A RAIL-CAR BASIS§

	Cattle		Calves		Hogs		Sheep		Total	
	1938	1937	1938	1937	1938	1937	1938	1937	1938	1937
Total Interstate Plus Fort Worth†	4,609	5,792	811	759	490	412	1,563	1,221	7,473	8,184
Total Intrastate Omitting Fort Worth	685	978	112	127	42	31	76	157	915	1,293
TOTAL SHIPMENTS	5,294	6,770	923	886	532	443	1,639	1,378	8,388	9,477

TEXAS CAR-LOT§ SHIPMENTS OF LIVE STOCK, JANUARY 1 TO JULY 1

	Cattle		Calves		Hogs		Sheep		Total	
	1938	1937	1938	1937	1938	1937	1938	1937	1938	1937
Total Interstate Plus Fort Worth†	26,942	32,307	4,299	4,072	3,589	4,305	5,815	6,142	40,645	46,826
Total Intrastate Omitting Fort Worth	4,438	4,475	850	830	325	311	279	404	5,892	6,020
TOTAL SHIPMENTS	31,380	36,782	5,149	4,902	3,914	4,616	6,094	6,546	46,537	52,846

§Rail-car Basis: Cattle, 30 head per car; calves, 60; hogs, 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.

JUNE RETAIL SALES OF INDEPENDENT STORES IN TEXAS

	Number of Firms Reporting	June 1938		Year-to-date 1938	
		Dollar Sales	Percentage Change in Dollar Sales from June 1937	Dollar Sales	Percentage Change in Dollar Sales from Year-to-date 1937
TOTAL TEXAS	1,293	14,772,958	-11.6	975	75,556,066
TEXAS STORES GROUPED BY PRODUCING AREAS:					
DISTRICT 1-N	80	597,868	-25.5	55	2,507,136
Amarillo	16	169,083	-22.1	12	829,883
Pampa	17	196,786	-27.1	9	712,836
Plainview	12	67,549	-37.7	10	422,193
All Others	35	164,450	-20.5	24	542,224
DISTRICT 1-S	27	366,080	-12.0	18	2,224,600
Big Spring	10	47,452	-13.3	6	125,742
Lubbock	11	286,179	-10.7	10	1,984,636
All Others	6	32,449	-20.4	2	114,222
DISTRICT 2	112	677,296	-10.0	85	3,384,357
Abilene	16	166,921	-17.3	13	858,561
Childress	3	15,515	+9.1	*	*
Snyder	5	29,213	-5.2	4	130,644
Vernon	6	24,171	-0.2	5	129,538
Wichita Falls	15	181,585	-9.0	7	799,980
All Others	67	259,891	-7.9	56	1,465,634
DISTRICT 3	44	304,329	-8.3	24	752,426
Brownwood	7	41,460	+12.6	4	166,831
Eastland	7	15,725	-7.7	4	60,339
Stephenville	7	33,604	-25.9	3	139,070
All Others	23	213,540	-8.3	13	386,186
DISTRICT 4	315	4,429,153	-12.0	250	23,495,073
Cleburne	10	41,541	+0.1	9	208,665
Commerce	5	10,517	+0.6	3	45,138
Corsicana	10	58,557	-5.6	10	379,833
Dallas	55	2,023,216	-8.4	47	10,677,512
Denison	9	34,859	-11.8	8	199,601
Ennis	6	20,455	-32.5	5	132,073
Fort Worth	57	1,281,158	-15.8	40	7,244,775
Gainesville	5	20,848	-14.4	3	101,047
Sherman	9	48,429	-7.6	7	254,504
Taylor	8	65,476	-5.6	6	229,881
Temple	12	61,658	-13.7	10	328,150
Waco	33	332,449	-10.9	23	1,485,835
All Others	96	429,990	-18.5	79	2,208,059
DISTRICT 5	124	894,464	-12.2	100	4,914,450
Bryan	9	56,778	+7.9	9	317,728
Henderson	5	54,019	-28.3	5	372,783
Longview	11	69,779	-14.1	8	351,248
Marshall	13	62,176	-6.4	9	281,558
Tyler	19	235,107	-13.3	16	1,425,348
All Others	67	416,605	-11.8	53	2,165,785
DISTRICT 6	45	974,927	-16.3	42	6,035,700
El Paso	30	863,150	-14.7	29	5,422,835
All Others	15	111,777	-26.7	13	612,865
DISTRICT 7	63	350,224	-13.5	46	1,775,218
Brady	9	34,734	-32.9	6	181,039
San Angelo	14	147,743	-10.2	13	869,465
All Others	40	167,747	-11.2	27	724,714
DISTRICT 8	232	2,698,430	-8.9	167	13,745,721
Austin	25	458,204	+6.2	23	2,542,038
Corpus Christi	10	70,679	-20.2	6	345,689
Cuero	9	33,444	+1.0	8	163,367
Lockhart	9	57,819	-8.3	6	238,470
San Antonio	86	1,535,272	-9.5	55	7,920,364
San Marcos	6	31,846	-19.0	6	207,547
Yoakum	6	32,635	-33.8	4	131,431
All Others	81	478,531	-14.7	59	2,196,815
DISTRICT 9	174	3,062,171	-6.6	129	14,410,372
Bay City	5	37,468	-31.9	3	160,086
Beaumont	22	304,635	-13.5	17	1,472,312
Galveston	18	323,088	-6.3	12	932,191
Houston	66	1,895,715	-4.8	51	9,712,786
Port Arthur	18	228,808	-11.2	14	856,059
Victoria	7	34,227	-1.8	6	211,250
All Others	38	238,230	-1.8	26	1,065,688
DISTRICT 10	77	418,016	-22.9	59	2,311,013
Brownsville	13	78,011	-20.3	11	416,645
Harlingen	11	72,137	-37.5	11	528,880
Laredo	6	74,583	-27.4	5	521,800
Weslaco	6	36,539	-0.2	3	22,547
All Others	41	156,746	-17.2	29	821,141

*Not available.

See map on page 13, June 29, 1938 issue, showing crop reporting districts.

NOTE: Prepared from reports from independent retail stores to the Bureau of Business Research, cooperating with the United States Department of Commerce.

JUNE RETAIL SALES OF INDEPENDENT STORES IN TEXAS

	June, 1938				Year 1938			
	Number of Firms Reporting	Dollar Sales	Percentage Change in Dollar Sales from June 1937 to May 1938		Number of Firms Reporting	Dollar Sales	Percentage Change in Dollar Sales from Year 1937	
TEXAS	1,293	\$14,772,958	-11.6	-7.9	975	\$75,556,066	-	7.2
STORES GROUPED BY LINE OF GOODS CARRIED:								
APPAREL	148	1,952,970	-2.4	-16.6	123	11,924,922	+	1.4
Family Clothing Stores	38	252,757	-5.9	-8.3	28	1,097,882	-	3.6
Men's and Boys' Clothing Stores	54	828,439	-2.4	-13.7	44	4,571,434	+	2.0
Shoe Stores	21	125,150	+4.4	-10.6	20	805,003	+	0.5
Women's Specialty Shops	35	746,624	-2.3	-22.8	31	5,450,603	+	2.1
AUTOMOTIVE	144	3,038,734	-27.5	-5.6	111	17,258,686	-	18.4
Filling Stations	43	151,138	+7.1	+11.0	29	595,036	+	4.7
Motor Vehicle Dealers	101	2,887,596	-28.7	-6.3	82	16,663,650	-	19.1
COUNTRY GENERAL AND FARMERS' SUPPLIES	111	717,828	-12.0	-6.0	97	3,171,942	-	12.7
DEPARTMENT STORES	73	4,319,883	-4.0	-11.3	63	24,140,234	-	0.0
DRY GOODS AND GENERAL MERCHANDISE	18	67,483	-22.8	-9.0	3	37,621	+	1.4
Dry Goods	10	50,093	-8.0	-9.7	*	*	*	*
General Merchandise	3	5,989	+2.4	-8.6	*	*	*	*
Variety Stores	5	11,401	-58.0	-6.5	3	37,621	+	1.4
DRUG STORES	162	503,706	-1.7	-5.9	131	2,452,508	+	0.2
FLORISTS	35	35,815	+1.1	-25.7	21	181,680	+	1.9
FOOD	180	1,070,542	-6.8	-1.2	144	5,027,385	-	5.3
Grocery Stores	52	208,141	-7.3	-1.2	46	1,189,624	-	6.8
Grocery and Meat Stores	128	862,401	-6.6	-1.2	98	3,837,761	-	4.8
FURNITURE AND HOUSEHOLD	62	789,133	-14.0	+0.6	44	3,597,799	-	11.8
Furniture Stores	51	667,917	-12.2	+0.2	34	3,063,970	-	9.7
Household Appliance Stores	7	100,201	-15.9	+9.4	6	367,642	-	25.2
Other Home Furnishings Stores	4	21,015	-44.3	-19.6	4	166,187	-	15.1
JEWELRY	52	207,364	-12.5	-24.9	41	750,564	-	2.2
LUMBER, BUILDING, AND HARDWARE	273	1,953,253	-8.9	+1.2	172	6,492,669	-	11.7
Farm Implement Dealers	12	84,343	-30.7	+24.1	9	346,799	-	22.1
Hardware Stores	74	373,223	-13.4	-5.8	52	1,547,402	-	7.5
Lumber and Building Material Dealers	183	1,449,447	-4.6	+1.7	108	4,358,571	-	12.2
Heating and Plumbing Shops	4	46,240	-34.6	+12.7	3	239,897	-	10.1
RESTAURANTS	25	86,687	-3.6	-2.1	18	413,855	-	2.0
ALL OTHER STORES	10	29,560	+5.3	+3.6	7	106,201	+	11.9
TEXAS STORES GROUPED ACCORDING TO POPULATION OF CITY:								
All Stores in Cities of—								
OVER 100,000 POPULATION	294	7,598,511	-9.9	-9.1	222	40,978,272	-	6.5
50,000-100,000 POPULATION	116	1,647,184	-6.4	-7.1	89	7,288,435	-	4.1
2,500-50,000 POPULATION	552	4,004,878	-16.5	-7.6	415	20,633,406	-	8.5
LESS THAN 2,500 POPULATION	331	1,522,385	-11.4	-3.6	249	6,655,953	-	10.4

*Not available.

NOTE: Prepared from reports from independent retail stores to the Bureau of Business Research, cooperating with the United States Department of Commerce.

TEXAS CHARTERS

	June 1938	June 1937	May 1938	First Half 1938	First Half 1937
Domestic Corporations—					
Capitalization	\$5,947	\$1,573	\$1,785	\$15,793	\$12,826
Number	128	99*	122	813	811
Classification of new corporations:					
Banking-Finance	3	2	5	22	34
Manufacturing	25	17	21	159	133
Merchandising	28	28	26	208	201
Oil	29	20	31	188	177
Public Service	3	1	—	4	9
Real Estate-Building	15	9	9	62	66
Transportation	2	2	6	21	24
All Others	23	20	24	149	167
Number capitalized at less than \$5,000	39	31	44	284	291
Number capitalized at \$100,000 or more	5	2	3	27	25
Foreign Corporations (Number)	24	30	18*	156	211

*Revised.

||In thousands.

NOTE: Compiled from records of the Secretary of State.

TEXAS COMMERCIAL FAILURES

	June 1938	June 1937	May 1938	First Half 1938	First Half 1937
Number	12	17	12*	99	77
Liabilities	\$94	\$89	\$241*	\$1,182	\$796
Assets	\$48	\$44	\$115	\$ 611	\$346
Average Liabilities per Failure	\$ 8	\$ 5	\$ 20	\$ 12	\$ 10

*Revised.

||In thousands.

NOTE: From Dun and Bradstreet, Inc.

LUMBER

(In Board Feet)

	June 1938	June 1937	May 1938
Southern Pine Mills:			
Average Weekly Production per unit	279,777	325,506	273,869
Average Weekly Shipments per unit	251,900	287,149	258,981
Average Unfilled Orders per Unit, End of Month	526,434	603,955	464,252

NOTE: From Southern Pine Association.

JUNE CREDIT RATIOS IN TEXAS RETAIL 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	
		1938	1937	1938	1937	1938	1937
All Stores.....	74	64.9	63.7	37.7	39.6	1.5	1.4
Stores Grouped by Cities:							
Abilene.....	4	56.4	56.0	29.7	32.6	2.4	2.4
Amarillo.....	3	59.6	50.3	39.2	41.9	2.4	2.4
Austin.....	6	57.4	54.9	44.8	44.7	1.1	1.3
Beaumont.....	3	63.4	63.3	38.9	41.4	1.7	1.7
Dallas.....	11	70.7	68.7	37.8	40.4	1.3	1.3
Fort Worth.....	8	64.3	62.2	35.8	36.3	1.3	1.3
Houston.....	9	63.2	63.7	40.7	42.3	1.9	1.6
San Antonio.....	5	66.2	66.6	42.0	42.7	1.1	0.8
Waco.....	4	62.4	59.9	26.9	29.1	1.5	1.6
All Others.....	21	57.1	56.2	35.9	39.1	1.8	1.7
Stores Grouped According to Type of Store:							
Department Stores (Annual Volume Over \$500,000).....	21	64.2	63.0	39.4	40.5	1.4	1.3
Department Stores (Annual Volume Under \$500,000).....	13	59.2	58.2	33.9	37.4	2.2	2.2
Dry Goods-Apparel Stores.....	6	60.9	56.2	36.4	36.3	2.0	2.4
Women's Specialty Shops.....	13	71.2	68.9	32.0	36.9	1.3	1.3
Men's Clothing Stores.....	21	65.8	65.9	38.8	39.4	1.9	1.7
Stores Grouped According to Volume of Net Sales During 1937:							
Over \$2,500,000.....	11	67.3	65.7	41.4	43.7	1.1	1.1
\$2,500,000 down to \$1,000,000.....	9	62.8	60.6	35.7	36.6	1.5	1.4
\$1,000,000 down to \$500,000.....	10	59.6	55.4	40.4	41.0	1.6	1.5
\$500,000 down to \$100,000.....	33	59.4	55.8	37.2	37.9	2.5	2.0
Less than \$100,000.....	11	55.5	52.1	34.2	39.2	3.3	3.1

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.

POSTAL RECEIPTS

	June 1938	June 1937	May 1938	1938	First Half 1937
Abilene.....	\$ 17,892	\$ 16,422	\$ 17,556	\$ 107,092	\$ 98,178
Amarillo.....	31,096	27,743	28,082	184,823	167,875
Austin.....	65,714	51,733	68,847	382,051	334,014
Beaumont.....	25,067	21,397	24,472	151,862	137,686
Big Spring.....	5,923	5,251	5,317	36,175	31,332
Brownsville.....	5,044	4,580	5,948	35,972	35,697
Brownwood.....	5,638	5,468	5,665	35,092	33,316
Corpus Christi.....	23,035	20,820	23,492	140,839	121,689
Corsicana.....	4,881	4,844	4,760	30,586	30,848
Dallas.....	346,648	347,277	341,240	2,056,449	2,106,337
Del Rio.....	2,913	3,364	2,078	22,359	26,847
Denison.....	4,535	3,970	4,495	28,246	26,600
Denton.....	6,380	6,007	6,150	39,778	37,616
El Paso.....	39,598	43,663	43,847	247,576	257,619
Fort Worth.....	139,715	135,063	124,939	803,068	829,616
Galveston.....	28,618	27,414	28,019	164,832	155,772
Gladewater.....	2,930	2,740	2,696	17,650	17,323
Graham.....	2,497	2,030	1,985	13,384	12,539
Harlingen.....	5,081	5,651	5,193	33,717	31,122
Houston.....	230,778	213,124	222,156	1,362,670	1,298,684
Jacksonville.....	3,589	3,724	4,991	21,784	22,296
Longview.....	10,024	8,333	9,960	61,339	55,763
Lubbock.....	16,181	13,855	15,665	97,547	80,666
McAllen.....	3,434	3,464	4,277	26,811	23,608
Marshall.....	6,171	5,448	5,657	34,542	32,320
Palestine.....	4,668	4,732	4,253	30,848	31,286
Pampa.....	6,053	6,213	6,478	39,067	38,282
Paris.....	5,727	5,520	5,066	34,400	33,962
Plainview.....	3,636	3,737	3,824	23,751	22,417
Port Arthur.....	12,107	11,403	12,758	75,766	68,701
San Angelo.....	11,043	10,201	11,261	66,953	63,453
San Antonio.....	117,324	110,879	116,877	709,063	678,771
Sherman.....	6,762	6,811	7,426	42,411	41,913
Sweetwater.....	4,342	4,658	4,768	28,584	28,289
Tyler.....	15,929	13,724	14,210	95,541	93,581
Waco.....	31,956	31,550	31,872	193,701	185,676
Wichita Falls.....	24,044	21,777	23,805	144,249	122,840
TOTAL.....	\$ 1,276,973	\$ 1,214,590	\$ 1,250,085	\$ 7,620,578	\$ 7,414,534

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

CONSUMPTION OF ELECTRIC POWER IN TEXAS

Power Consumed
(In Thousands of K.W.H.)

	June 1938	June 1937	May 1938	First Half 1938	1937	June 1938 from June 1937	Percentage Change June 1938 from May 1938	First Half 1938 from First Half 1937
Commercial	51,058	44,801	44,687	263,052	232,981	+ 14.0	+ 14.3	+ 12.9
Industrial	103,603	110,379	100,190	590,390	575,629	- 6.1	+ 3.4	+ 2.6
Residential	34,425	30,423	32,570	195,614	172,366	+ 13.2	+ 5.7	+ 13.5
All Other	27,213	26,850	26,967	153,649	149,704	+ 1.4	+ 0.9	+ 2.6
TOTAL	216,299	212,454	204,414	1,202,705	1,130,680	+ 1.8	+ 5.8	+ 6.4

NOTE: Prepared from reports from 17 electric power companies to the Bureau of Business Research.

COTTON BALANCE SHEET IN THE UNITED STATES AS OF JULY 1

(In Thousands of Running Bales Except as Noted)

	Carryover Aug. 1	Imports to July 1*	Final Ginnings	Total	Consumption to July 1	Exports to July 1	Total	Balance to July 1
1928-1929	2,536	436	14,297	17,269	6,544	7,806	14,350	2,919
1929-1930	2,313	374	14,548	17,235	5,727	6,514	12,241	4,994
1930-1931	4,530	98	13,756	18,384	4,812	6,501	11,313	7,071
1931-1932	6,369	123	16,595	23,087	4,587	8,258	12,845	10,242
1932-1933	9,682	118	12,710	22,510	5,537	7,727	13,264	9,246
1933-1934	8,176	137	12,664	20,977	5,340	7,229	12,569	8,408
1934-1935	7,746	100	9,472	17,318	4,970	4,519	9,489	7,829
1935-1936	7,138	135	10,417	17,690	5,744	5,806	11,550	6,140
1936-1937	5,397	234	12,130	17,761	7,362	5,316	12,678	5,083
1937-1938	4,498	134	18,242	22,874	5,307	5,403	10,710	12,164

The cotton year begins August 1.

*In 500-pound bales.

NOTE: The figures have been revised in accordance with the revisions made by the United States Bureau of the Census.

BUILDING PERMITS

	June 1938	June 1937	May 1938	1938	First Half 1937
Abilene	\$ 28,630	\$ 29,477	\$ 63,648	\$ 522,699	\$ 233,097
Amarillo	151,941	102,620	118,083	738,538	455,535
Austin	390,278	379,188	372,357	2,817,824	2,131,541
Beaumont	108,939	116,584	91,318	686,444	619,443
Big Spring	31,360	6,558	50,695	181,975	81,716
Brownsville	21,637*	11,910	5,430*	†	103,376‡
Brownwood	3,670	2,818	2,918	17,738	18,158
Corpus Christi	261,743*	407,990	183,670	1,643,407	1,847,844
Corsicana	31,655*	1,845	20,459	107,665	69,601
Dallas	958,113	908,468	1,134,065	6,053,509	6,532,699
Del Rio	10,700	7,875	21,025	71,550	62,733
Denison	29,917	7,607	13,830	98,716	43,750
Denton	20,255	20,750	36,075	84,220	47,935
El Paso	184,556	177,087	109,127	728,813	721,279
Fort Worth	620,652	788,601	346,894	3,183,661	4,786,191
Galveston	86,063	62,956	93,664	1,325,299	565,887
Gladewater	6,700	2,900	4,389	†	†
Graham	22,790	16,375	10,367	89,077	110,630
Harlingen	32,500	23,152	23,808	99,338	163,390
Houston	3,544,245	1,502,900	1,777,745	13,788,265	11,146,099
Jacksonville	1,687	3,500	21,250	36,502	92,523
Laredo	2,550	15,350	5,850	28,525	62,125
Lubbock	256,196	144,143	232,582	1,248,898	651,949
McAllen	15,120	23,230	32,990	128,360	156,530
Marshall	22,188	26,898	45,959	†	177,468‡
New Braunfels	9,900*	6,325	15,080	66,365	†
Palestine	9,822	17,023	17,902	171,678	104,544
Pampa	20,000	18,430	15,500	113,325	146,270
Paris	3,020*	12,840	6,345	58,173	41,295
Plainview	8,250	2,970	5,860	30,030	34,789
Port Arthur	80,614	69,039	87,120	856,185	559,326
San Angelo	46,485	63,257	48,076*	198,783	177,456
San Antonio	989,331	406,002	505,780	2,539,695	2,496,217
Sherman	17,050	148,637	59,775	168,794	223,745
Snyder	—	8,600	1,100*	10,275	28,450
Sweetwater	7,605	4,174	35,380	99,931	98,742
Tyler	58,735	63,430	97,673	744,770	691,568
Waco	70,107	138,800	92,823	511,702	596,776
Wichita Falls	78,940*	31,005	96,904	364,430	170,046
TOTAL	\$ 8,243,944	\$ 5,781,314	\$ 5,903,516	\$39,548,794	\$35,969,879

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

*Does not include public works.

†Not available.

‡Not included in total.

EMPLOYMENT AND PAY ROLLS IN TEXAS, CLASSIFIED BY INDUSTRIES AND SELECTED CITIES, JUNE, 1938

Pay Rolls for One Week Ending Nearest Fifteenth of Month

Industry	Number of Establishments Reporting	Number of Employees June 1938	Percentage Change from		Amount of Pay Roll June 1938	Percentage Change from		Average Weekly Wage per Employee*		
			May 1938	June 1937		May 1938	June 1937	June 1938	May 1938	June 1937
<i>All Manufacturing Industries</i>	679	49,668	+ 0.6	- 11.5	\$1,257,910	- 2.9	- 8.4	\$25.33	\$26.24	\$24.26
<i>Food Products</i>										
Bakery Goods.....	36	892	+ 0.5	- 8.4	17,643	+ 1.5	- 1.8	19.78	19.57	19.82
Beverages, Carbonated.....	31	585	+ 5.0	+ 13.6	12,646	+ 7.5	+ 9.6	21.62	21.12	20.72
Confectionery.....	3	108	- 10.7	+ 4.0	1,774	- 15.0	+ 5.2	16.43	17.24	13.97
Flour Milling.....	8	519	- 1.0	- 6.2	12,407	- 3.1	- 4.8	23.91	24.43	23.33
Ice, Manufactured.....	65	944	+ 27.6	- 14.7	16,075	+ 14.3	- 9.1	17.03	19.01	16.09
Ice Cream.....	6	264	+ 4.3	- 26.9	5,329	- 1.1	- 24.3	20.19	21.29	19.08
Meat Packing.....	12	3,601	+ 12.5	- 12.1	94,909	+ 11.8	- 11.4	26.36	26.53	26.63
<i>Textiles</i>										
Cotton Textile Mills.....	10	2,728	+ 1.0	+ 0.1	33,006	- 8.4	- 5.1	12.10	13.34	12.80
Men's Work Clothing.....	15	1,157	- 5.7	- 30.7	11,525	- 2.5	- 38.2	9.96	9.64	10.39
<i>Forest Products</i>										
Furniture.....	11	622	- 3.7	- 16.5	10,673	- 6.5	- 22.2	17.16	17.67	18.08
Lumber: Planing Mills.....	18	574	- 5.0	- 12.4	11,581	- 4.5	- 17.9	20.18	20.07	22.35
Lumber: Saw Mills.....	12	1,616	- 1.7	- 17.2	23,844	- 7.2	- 25.2	14.75	15.62	16.38
Paper Products.....	12	531	+ 3.7	+ 3.4	11,339	+ 7.7	+ 11.5	21.35	20.56	19.42
<i>Printing and Publishing</i>										
Commercial Printing.....	41	841	+ 6.2	+ 2.5	22,785	- 5.4	- 0.9	27.09	30.42	24.96
Newspaper Publishing.....	18	852	- 2.8	+ 0.4	29,170	- 4.2	\$	34.24	34.70	35.38
<i>Chemical and Allied Products</i>										
Cottonseed Oil Products.....	30	562	+ 4.9	- 12.7	8,393	- 1.3	- 4.9	14.93	15.86	15.01
Petroleum Refining.....	34	17,937	- 0.5	- 6.4	599,105	- 3.5	- 2.5	33.40	34.44	31.74
<i>Stone and Clay Products</i>										
Brick and Tile.....	15	677	- 0.6	- 18.4	8,777	- 2.1	- 11.5	12.96	13.32	13.12
Cement.....	6	889	- 14.2	- 20.5	19,136	- 22.9	- 8.4	21.53	23.97	19.72
<i>Iron and Steel Products</i>										
Foundries, Machine Shops.....	36	3,289	+ 0.4	- 4.4	92,764	- 0.8	- 4.1	28.20	28.55	27.26
Steam Railroad Repair Shops.....	15	1,750	- 6.1	- 32.4	51,260	- 10.9	- 30.7	29.29	30.90	28.18
Structural and Ornamental Iron.....	12	864	+ 0.1	- 22.3	14,525	- 0.3	- 34.5	21.24	21.34	26.00
<i>Unclassified</i>										
Miscellaneous Manufacturing.....	233	8,046	+ 0.7	- 19.4	149,244	- 4.5	- 13.8	18.55	19.56	18.63
<i>Nonmanufacturing Industries</i>										
Crude Petroleum Production†.....	50	5,698	- 0.1	+ 2.4	189,330	- 0.2	- 0.2	33.23	33.27	36.20
Quarrying and Nonmetallic Mining.....	22	1,322	- 0.6	- 20.8	36,824	- 2.1	- 23.8	27.85	28.28	27.69
Public Utilities.....	769	18,361	+ 0.5	- 3.8	481,486	- 0.6	+ 1.5	26.22	26.52	26.48
Retail Trade.....	751	14,438	- 1.6	- 8.5	267,416	- 2.8	- 11.3	18.52	18.74	18.62
Wholesale Trade.....	247	4,938	+ 1.5	- 2.2	123,816	- 4.4	- 0.5	25.07	26.62	25.09
Cotton Compresses.....	18	709	+ 0.1	- 16.5	12,471	- 1.0	- 3.4	17.59	17.79	17.91
Dyeing and Cleaning.....	16	440	+ 3.3	+ 10.0	9,116	+ 10.9	+ 14.9	20.72	19.29	17.65
Hotels‡.....	29	2,409	- 3.7	- 2.6	30,519	- 3.6	+ 2.6	12.67	12.65	12.22
Laundries.....	37	1,736	+ 1.9	- 2.9	21,781	+ 4.1	- 5.9	12.55	12.28	12.84
Miscellaneous Nonmanufacturing.....	173	2,047	+ 0.4	- 19.4	57,394	- 0.4	- 12.1	28.04	28.26	19.45
STATE.....	2,791	101,766	+ 0.2	- 8.0	2,488,063	- 2.2	- 5.8	24.45	25.03	23.99
<i>Cities</i>										
Abilene.....	25	385	+ 6.1	- 1.5	7,302	- 4.7	- 3.1			
Amarillo.....	35	782	- 12.4	- 17.1	21,039	- 16.7	- 13.7			
Austin.....	30	705	- 0.6	+ 9.2	12,473	- 2.0	- 1.3			
Beaumont.....	42	2,800	- 1.1	- 15.5	76,288	- 5.3	- 18.4			
Dallas.....	283	17,448	+ 0.1	- 4.5	406,829	- 0.7	- 2.1			
El Paso.....	98	2,886	- 0.5	- 0.9	55,242	- 5.2	- 4.2			
Fort Worth.....	145	7,208	+ 2.9	- 8.2	177,816	+ 0.1	- 8.5			
Galveston.....	23	612	- 2.4	- 4.1	15,189	- 2.7	- 1.2			
Houston.....	237	15,239	+ 0.3	+ 2.9	389,279	- 1.4	+ 5.1			
Port Arthur.....	13	6,968	+ 0.7	- 16.1	225,949	- 2.0	- 9.8			
San Antonio.....	195	5,334	\$	- 5.9	112,928	- 2.4	- 2.1			
Sherman.....	20	780	+ 0.3	- 18.8	12,993	- 2.3	- 23.6			
Waco.....	64	1,747	- 1.9	- 6.5	30,807	- 4.3	- 9.8			
Wichita Falls.....	34	1,092	- 4.7	+ 6.4	25,500	- 10.2	+ 21.3			

*Not strictly comparable from month to month because of changes in the size and composition of the reporting sample.

†Crude petroleum and natural gas production, including natural gasoline.

‡Cash payments only; the additional value of board, room and tips cannot be computed.

\$No change.

Prepared from reports from Texas industrial establishments to the Bureau of Business Research, cooperating with the United States Bureau of Labor Statistics.