















**BUSINESS SITUATION IN ARIZONA**

Taken as a whole, business is proceeding on a level comparable to a year ago, with slight increases and decreases according to branches and communities. Basically Arizona is in the best condition since the post-war boom, but further improvement necessarily will be slow and solid, rather than spectacular.

Meanwhile development of the state is going ahead rapidly. The biggest single advance of the first half of the year was the passage by the House of Representatives on June 4 of the bill authorizing the San Carlos dam. As the bill already had passed the Senate, the reclamation of more than 100,000 acres in the Florence-Casa Grande valley is now assured, increasing the state's agricultural area almost one-

fifth at one stroke. It probably will be at least five years before the project is completed.

Reduced tourists travel on account of the California situation continues to have an adverse influence on a number of communities, but on the other hand it is probable that a greater proportion of Arizonians will spend their vacations in the state.

The cotton crop is making good progress, but it is still uncertain just how largely average has been increased over last year, although a very considerable increase is certain. Grain and hay harvests are proceeding satisfactorily, and cantaloupe shipments will begin around the first of July.

Range and stock conditions continue good, but movement of cattle during the month was not particularly active, being restricted mainly to the southern and southeastern counties. Shipments of beef cattle were affected adversely by foot-and-mouth disease regulations on the coast, but demand is now strengthening.

Notwithstanding further decreases in stocks on hand, the price of copper showed another small recession, the market closing the month just under 13 cents. Production was unchanged and much development work continues.

Banking transactions reported to the Arizona Industrial Congress on the whole showed increases over April, but in the aggregate were little changed from the same month of last year.

**Agriculture**

Rapid progress of the cotton crop, and continued harvest of grain and hay, are marking the progress of the agricultural season. Grain and hay yields are reported good; a larger percentage than usual of the grain average may be pastured.

Weather conditions have delayed the cantaloupe season in the Salt River Valley slightly, so that earlier shipments probably will not begin until the first of July. If conditions remain favorable the next month the 3,000 acres planted should yield around 1,500 cars. Average last year was 2,100, and about 1,170 cars were shipped. The Industrial Congress is negotiating with the Department of Agriculture for a federal inspection service for the crop, which would greatly facilitate marketing, and it is believed the service will be obtained, as federal inspection was extended for lettuce last winter, and was available for the spring lettuce also if average had warranted.

Cotton is generally reported making satisfactory progress. The crop is reported from a week to two weeks late in Yuma and Pinal counties, and much replanting was done in Yuma and Maricopa. Condition of the crop for the state as a whole is given by the U. S. Bureau of Agricultural Economics as 90 per cent, two points below the same date last year, but higher than in the three preceding years.

Revised estimates place the cotton acreage harvested last year at 127,000 acres, with total ginnings of 77,684 running bales, equivalent to 27,139,000 pounds, of which 10,745,000 were Pima and the rest shorter staples. Proportion of Pima grown this year will show further reduction. No preliminary estimates on the 1924 acreage have been made, but the state's total may exceed 160,000 acres, exclusive of the acreage in Pima county which has been declared a non-cotton zone.

The best piece of agricultural news this year came on June 4 with announcement of the passage by Congress of the San Carlos bill, which assures the reclamation of more than 100,000 acres in the Florence-Casa Grande valley.

Although shipments were the heaviest so far this year, proved a somewhat slow month in movement of both beef and range cattle as compared to a year ago.

Activity during the month centered chiefly in the southern and southeastern counties, range cattle moving on deliveries to Colorado, Nebraska and Kansas buyers. Yearling steers, two's and three's predominated, the bulk of which netted the growers 5 to 5 1/2 cents a pound. The one unusually large shipment brought \$25 a head for yearlings.

Both stock and range conditions are generally good to excellent, and June should see a larger movement of stock, as few shipments have been made as yet from the northern part of the state.

Movement of beef cattle from the feeding sections was retarded to a marked degree by the foot-and-mouth disease regulations at coast packing centers, with California dealers favoring cattle from their own districts to lighten the possible effects of further infections. Arizona feeders were forced to await the time when California supplies of good beef stock diminished. Demand seemed to get strengthened the latter days of the month, as evidenced by several shipments of feeder cattle from the Salt River valley, and of beef gathered on desert ranges. Good beef steers brought \$8.00 to \$8.50 a hundred, and one sale was made at \$9.00, f. o. b. loading point. Cows were mostly 5 to 5 1/2 cents a pound f. o. b. ears. Local packers and butchers used range beef practically through the month, as the supply was large on the lower elevations.

Indications point to a wider movement of beef stock in June and early July, with the epizootic on the coast apparently slackening under federal control.

**Mining**  
The copper market showed another recession in May, finishing just below the 13 cent level, despite the fact that the period started with a further reduction in stocks on hand, and with the surplus representing only a month's supply.

April shipments aggregated 234,000,000 pounds, comparing well with March's record of 271,400,000. Exports made up 102,000,000 pounds, of the April total, indicating that foreign orders are keeping up to average. April production dropped to 216,000,000, reducing surplus stocks 18,000,000 pounds, to 221,000,000, compared with 211,000,000 the first of the year.

No material change has been made in production in this state, and on the other hand much development work continues. Magna increased its production to 2,500,000 pounds in April. The Porphyry shaft of the Inspiration will be in operation soon. Two sections of the Ray Consolidated mill have been remodeled, and two more will be reconstructed. The Verde Central shaft, having been completed to 1,000 feet, is now to be continued to 1,500. The Shannon Copper company at Gleason is planning to burn its sulphide ores in the ground, and after flooding out the fire to use water for leaching.

An interesting development of the month was the closing down of the celebrated United Eastern gold mine June 1, its ores having been exhausted. Directors of the Tom Reed made an important change in operating policy by deciding to lease the larger part of its properties.

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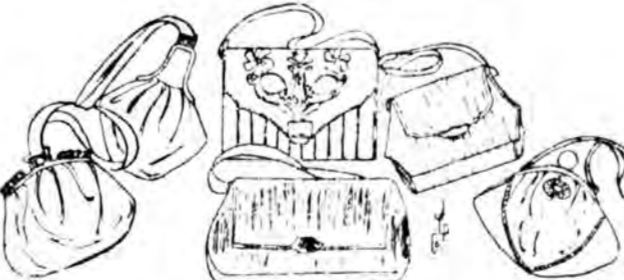
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