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Weekly Bulletin

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Balance of Payments

Second quarter estimates of the balance of international payments show the seasonally-adjusted current account deficit at \$1,357 million, up from revised \$504 million in the previous quarter. Unadjusted, the deficit was \$1,352 million. Capital movements — which are not seasonally adjusted — led to a net inflow of \$1,951 million and the balancing item representing net errors and omissions in the recorded estimates of the current and capital accounts was equivalent to a net outflow of \$23 million. The surplus led to a net increase in official monetary assets of \$576 million.

Main quarterly movements:

- a sharp contraction of over \$900 million in the seasonally-adjusted surplus on merchandise trade to \$554 million as the value of merchandise imports rose faster than exports. Export and import prices both rose about 1% while the volume of exports and imports increased about 1.3% and 0.4% respectively. The 10.8% rise in the value of imports was the strongest since third quarter 1974
- among exports, large increases, on a seasonally-adjusted basis, for automotive products, wheat, aluminum, lumber, industrial machinery and agricultural machinery. Decreases were recorded for iron ore, barley, crude petroleum, newsprint, fish, natural gas and nickel ore. Import commodities rising the most were automotive products, industrial machinery, coal, chemicals, agricultural machinery, office machinery, and communications equipment. There was a large decline for crude petroleum
- a small \$60 million decline in the seasonally-adjusted non-merchandise trade balance as receipts rose faster than payments
- a \$1,651 million jump to \$2,346 million in the net inflow from capital movements in long-term forms compared with the previous quarter
- risers in Canadian new issues abroad, loans from foreign banks (largely reflecting Government of Canada borrowing) and a swing to a net sales balance from transactions in outstanding Canadian bonds which accounted for the increase in long-term capital inflows.

Partly offsetting these movements was a swing to a net outflow from foreign direct investment augmented by increased net

LATEST MONTHLY STATISTICS

EMPLOYMENT, INCOME

EMPLOYMENT, INCOME					
Average Weekly Earnings (\$)	June	268.80p	264.21r	6.7	
Labour Income (\$ million)	June	11,273.5p	10,873.0r	9.0	
Persons with Jobs (million)	July	10.64	10.40	4.1	
Unemployed	July	927,000	903,000	5.6	

INVENTORIES

Department Store (\$ million)	May	2,042.8	2,020.1	3.1
Manufacturers' Owned (\$ million)	June	19,649.8p	19,510.4r	9.8
Wholesale (\$ million)	June	8,130.4	7,299.8	11.4

ORDERS

Manufacturers' New Orders (\$ million)	June	11,739.6p	11,422.7r	15.2
Manufacturers' Unfilled Orders (\$ million)	June	11,830.9p	11,739.6r	12.4

PRICES

Consumer Price Index (1971=100)	July	177.7	175.1	9.8
Industry Selling Price Index (1971=100)	June	187.0	186.2	7.5
Wholesale Price Index (1935-39=100)	June	604.0p	600.5r	8.0

CONSTRUCTION

			Year-to-date	
Building Permits (\$ million)	June*	1,305.8	5,942.7	0.4
Housing Starts — Urban Centres (units)	July*	16,388	102,160	-4.7

ENERGY

Coal Production (thousand tons)	May	2,730.4	14,016.5	-2.4
Electricity Generation (terawatt hours)	May	25.1	146.1	8.9
Natural Gas Production (billion cu. ft.)	May	270.4	1,524.6	-2.6
Petroleum Refining (million barrels)	June	58.0	316.8	-3.8

FOREIGN TRADE

Exports — Customs Basis (\$ million)	July	3,782.8	29,197.2	14.3
Imports — Customs Basis (\$ million)	July	3,836.2	27,919.1	13.1

PRODUCTION

Motor Vehicles (thousand units)	June	182.6	989.6	-1.0
Steel (ingots — thousand tons)	July	1,345.5	9,453.9	11.3

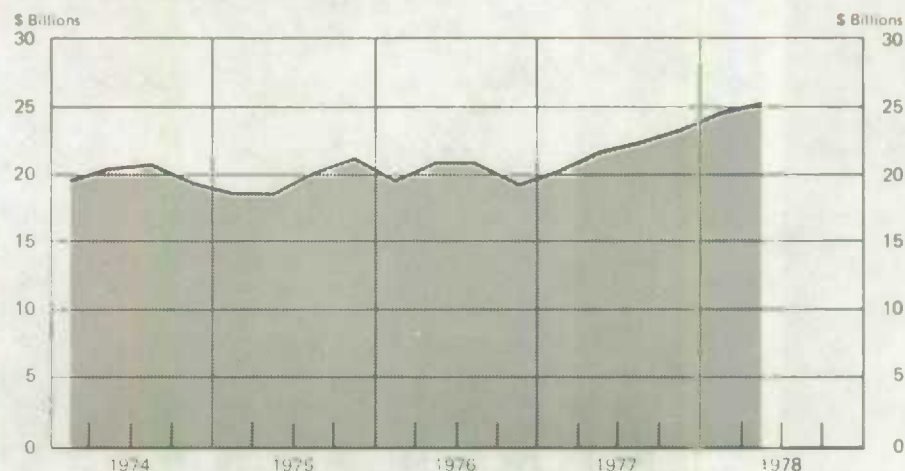
SALES

Department Store Sales (\$ million)	July*	550.4p	3,699.4p	8.9
Manufacturers' Shipments (\$ million)	June	11,648.3p	62,176.3p	14.6
New Motor Vehicle Sales (\$ million)	July*	812.1	5,918.6	13.5
Retail Sales (\$ million)	June	6,271.5p	31,978.4p	12.6
Wholesale Sales (\$ million)	June	5,708.5	30,090.9	9.0

Statistics are not seasonally adjusted. p - preliminary. r - revised. * - new this week.

Corporation Profits (Before Taxes)

Data Seasonally Adjusted at Annual Rates



Source: National Income and Expenditure Accounts (13-001)

outflows for direct investment abroad and trading in outstanding equities, the latter movement reflecting the establishment of a controlling interest in a major Canadian oil company through the purchase of United States portfolio holdings. In addition, there was a \$112 million decline to \$395 million in the net outflow from short-term capital movements and an overall surplus of \$576 million with reserve assets and liabilities increasing by \$871 million and \$295 million, respectively. (Increase in reserve assets includes proceeds of borrowings of U.S. \$750 million, 1.5 billion Deutsche marks and a net increase in drawings under the standby facility with Canadian chartered banks.)

The dollar closed the quarter valued at 89.08 U.S. cents, up from a first quarter close of 88.19 U.S. cents. During April it had dropped to 86.63 U.S. cents, its lowest value in United States dollar terms since the early 1930s.

For further information, contact D.K. McAlister (613-995-0743), Balance of Payments Division, Statistics Canada, Ottawa K1A 0T6.

Household Facilities/Equipment

Adjustments have been made in estimates derived from surveys taken in 1972-1976 to reflect revisions in original projections of total households. The revisions are designed to improve comparability to the 1976 Census base. Revised estimates for all or for individual tables and for all five years or for particular years are available.

Please direct requests to Penny Barclay (613-992-4742) or Donna Chan (613-992-4743), Consumer Income and Expenditure Division, Statistics Canada, Ottawa K1A 0T6.

Commercial Failures

Preliminary total of failures recorded under provisions of the Bankruptcy and Winding-up Acts was 1,343 during second quarter 1978 (888, 1977). Estimated total of liabilities: \$153,525,201 (\$213,573,342).

For further information, Order the second quarter 1978 issue of Commercial Failures (61-002, 70¢/\$2.80), or contact R.R. Rotor (613-996-6631).

New Motor Vehicle Sales

New motor vehicles sold in July rose 6.0% to 115,260 from 1977. Automobiles made in the United States and Canada rose 9.7% to 67,821 and Canadian and U.S. commercial vehicles 12.5% to 31,277.

Automobiles from overseas fell 15.5% to 15,001 from 1977 and overseas-made commercial vehicles fell 17.0% to 1,161. Value of the cars rose 0.7% to \$91.3 million and the commercial vehicles 0.5% to \$7.0 million. Value of U.S. and Canadian cars sold rose 18.9% to \$447.8 million; commercial vehicles rose 27.3% to \$273.0 million.

Sales value of all vehicles increased 19.2% to \$812.1 million, including 387 coaches and buses valued at \$8.8 million. Seasonally-adjusted sales of automobiles manufactured in Canada and the U.S. fell 0.2% from June to 70,524 and those of cars from overseas fell 5.6% to 13,602. Seasonally-adjusted sales of all commercial vehicles fell 1.7% to 32,397.

For seven months of 1978 sales reached 853,344 units (831,112 in 1977), value \$5,918.6 million, up 13.5% from 1977.

For further information, see the July 1978 issue of New Motor Vehicle Sales (63-007, 30¢/\$3), or contact M. Kwilecki (613-996-9304), Retail Trade Section, Merchandising and Services Division, Statistics Canada.

Cable Television 1977

Cable television revenue to August 31, 1977 increased 16.9% to \$232.9 million from \$199.2 million in 1976. Net income before depreciation interest and other adjustments rose 16.4% to \$106.0 million from \$91.1 million. Depreciation: \$43.3 million (\$39.6 million). Interest expense: \$19.7 million (11.3%). Before tax profit: \$45.0 million (\$36.0 million, up 25.0%).

Provision for income taxes was estimated at \$20.2 million leaving an estimated profit after tax of \$24.8 million (\$18.6 million, up 33.3%).

For further information, contact Patrick Crosby (613-996-9274), Communications Section, Transportation and Communications Division, Statistics Canada, Ottawa.

Industry Selling Price Index

The Industry Selling Price Index, manufacturing, rose 0.3% to 187.9 in July from revised June's 187.3 and 7.3% from 1977 (175.1). Major groups with most effect:

- primary metal industries: 0.7% reflecting increases of 3.7% for steel pipe and tube mills, 0.6% for iron and steel mills and 0.5% for smelting and refining
- wood industries: 0.6% due largely to 0.8% for sawmills and planing mills
- textile products: 1.1% mainly from a 3.1% increase for cotton yarn and cloth mills
- chemical and chemical products industries: 0.4% due largely to 0.7% for manufacturers of industrial chemicals (organic), 0.6% for manufacturers of pharmaceuticals and medicines and 1.4% for manufacturers of toilet preparations.

The index for food and beverage industries declined 0.1% with decreases of 0.6% for slaughtering and meat processors, 5.7% for cane and beet sugar processors and 1.2% for the feed industry. Fish products: up 1.8%; poultry processors, 2.5%.

For further information, order the July 1978 issue of Industry Price Indexes (62-011, \$1.40/\$5.60), or contact the information unit (613-995-5761), Industrial Sub-division, Prices Division.

International Travel

July saw 5.7 million United States visitors, down 1.6% from 1977. Canadian residents returning rose 3.6% to 5.2 million (mainly due to a large increase in same-day automobile travel). Visitors from countries other than the U.S. totalled 328,000, up 21.9%. Canadian travellers returning from these countries rose 0.4% to 154,000.

Year to date, 17.9 million United States visitors entered — down 1.2% from 1977 — and Canadian residents returning from the U.S. decreased 0.5% to 22.2 million. Visitors from other countries rose 15% to 918,000 and residents returning rose 3.2% to 1.1 million.

For further information, order the July 1978 issue of International Travel (66-002, 15¢/\$1.50), or contact Mike Valiquette (613-995-0847), International Travel Section, Statistics Canada, Ottawa K1A 0T6.

Labour Income

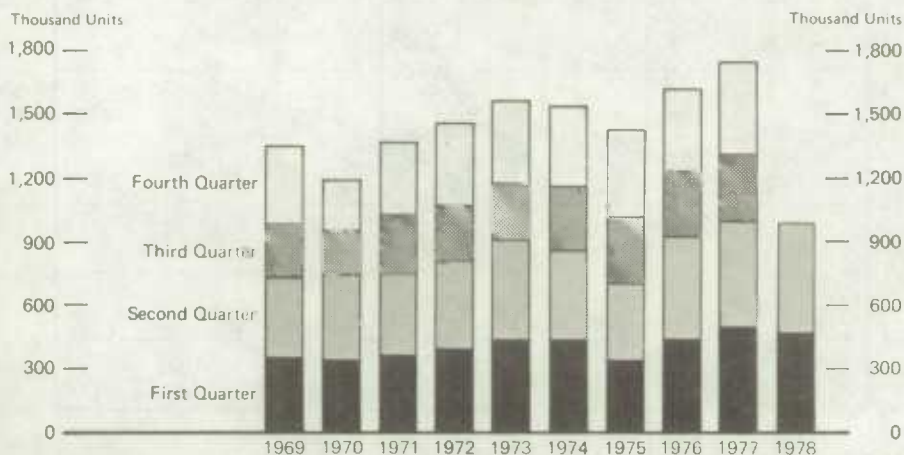
Total wages and salaries, June, rose 8.6% to \$10,412.4 million from \$9,587.7 million.

Breakdowns for wages and salaries (millions of dollars) were: primary industries \$123.6; forestry \$131.2; mines, quarries, oil wells \$258.5; manufacturing \$2,343.7; construction \$839.7; transportation, communication, other utilities \$1,074.6; trade \$1,349.3; finance, insurance, real estate \$667.1; commercial, personal service \$977.5; education, related services \$1,018.3; health, welfare services \$649.7; federal administration, other government offices \$400.3; local administration \$250.8; and provincial administration \$327.9.

Supplementary income for June reached \$861.1 million.

See detailed estimates in the April-June 1978 issue of Estimates of Labour Income (72-005, \$1.05/\$4.20), or contact Mrs. G. Gauthier (613-995-8067).

Canadian Production of Motor Vehicles



Source: Motor Vehicle Shipments (42-002)

GNP (Consumer Demand)

Personal expenditure, seasonally adjusted, second quarter, on goods and services, **expanded** 3.0%. After accounting for price changes, real personal expenditure rose 0.9%, continuation of the gradual expansion of consumer demand after weak performance through most of 1977. Expenditures on semi-durable goods registered the largest improvement rising 4.3% in volume on the strength of purchases of clothing, footwear and household furnishings. Spending on durable goods slowed to a 1.9% rate of real growth. Sharply increased expenditure on new cars, furniture and household appliances helped to buttress this component against large declines in purchases of most recreational goods. Consumption of non-durable goods fell 0.8% in constant dollars as a result of widespread declines. Purchases of food and non-alcoholic beverages, household fuels, alcohol and gasoline all fell. Real personal expenditure on services advanced 0.5% as a decline in net travel expenditure abroad was partly compensated for by increased expenditures on air transportation, rents, and communications.

The implicit price index for personal expenditure rose 2.1% — slight acceleration over the increase in the first quarter. Although retail sales tax cuts reduced many prices for durable and semi-durable goods an extremely large 6.5% advance in food prices, with increased taxes on alcohol and tobacco and price increases for most services, prevented any slowing of inflation in the consumer sector. Improved price performance of durable and semi-durable goods relative to non-durable goods and services may help to explain the strength of these purchases when compared with non-durable consumption.

Personal income rose 3.1% but with only a slight increase in personal direct taxes personal disposable income rose 3.3%. As personal expenditure on goods and services rose 3.0% the personal saving rate increased marginally from 11.5% to 11.7% in the second quarter.

For further information, order *National Income and Expenditure Accounts, Second Quarter 1978* (13-001, \$1.05/\$4.20).

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Average Earnings

Average weekly earnings rose 6.7% to \$268.80 in June from \$251.86 in 1977. Average hourly earnings in manufacturing reached \$6.87 (from \$6.39), in construction \$10.04 (\$9.79) and in mining \$8.74 (\$8.06).

Provincial breakdowns show average weekly earnings were highest in British Columbia (\$304.91) and followed by Alberta (\$278.01), Ontario (\$268.11), Québec (\$267.46), Saskatchewan (\$254.08), Newfoundland (\$245.11), Manitoba (\$240.34), New Brunswick (\$232.15), Nova Scotia (\$224.79) and Prince Edward Island (\$193.26).

Average weekly earnings by industry division were: construction \$393.79; mining \$373.39; forestry \$333.63; transportation, communication and other utilities \$311.29; manufacturing \$286.73; finance, insurance and real estate \$249.55; trade \$208.80 and service \$182.57.

For further information, order the *June 1978 issue of Employment, Earnings and Hours* (72-002, 70¢/\$7), or contact R. Ouellette (613-992-5613), Labour Division, Statistics Canada, Ottawa K1A 0V2.

Railway Operating Statistics

Six major railways' June net income: \$25.4 million, down 7.2% from a earlier year; total operating revenues rose 5.8% to \$314.2 million and operating expenses 7.2% to \$288.8 million. Freight ton-miles fell 6.4% from 1977, freight train-miles declined 0.5%, and freight car-miles 4.1%. Passenger-miles: 9.5% below the 1977 level, a result of losses incurred by intercity passenger services.

Half-year operating revenues: up 7.9% from 1977; expenses rose 7.6%, net income 12.0%. Cumulative ton-miles were off 1.4% but passenger-miles showed a slight (0.7%) gain.

For further information, order the *June 1978 issue of Railway Operating Statistics* (52-003, 30¢/\$3), or contact J.R. Slattery (613-996-9271), Transportation and Communications Division, Statistics Canada, Ottawa K1A 0T6.

Housing Starts

Residential building in July in centres of 10,000 population and above was marked by housing starts dropping 18.1% to 16,388 from 20,010 a year earlier.

Provincial figures with 1977 July totals in brackets: Ontario 6,309 (7,747), Québec 3,341 (5,042), Alberta 3,631 (2,697), British Columbia 1,352 (2,099), Manitoba 570 (1,041), Saskatchewan 549 (399), Nova Scotia 256 (238), New Brunswick 252 (334), Newfoundland 111 (364) and Prince Edward Island 17 (49).

For further information, order the *July 1978 issue of Housing Starts and Completions* (64-002, 55¢/\$5.50).

Urban Transit

In July 56 urban transit systems collected 88,607,782 initial passenger fares over 31,226,973 miles (50 254 942 km) with operating revenues of \$32,473,297.

For further information, contact *Surface Transport Section* (613-996-9271), Transportation and Communications Division, Statistics Canada, Ottawa K1A 0T6.

Education, 1978-79

Enrolment, universities and colleges, will decline 0.2%. About 372,330 fulltime post-secondary students in universities and 243,410 in colleges will be the second year in a row university enrolment declines and mark what seems to be a turnaround in college enrolment. At the elementary-secondary level 5,237,915 students are expected in September, 131,066 fewer than last year. (Enrolment at this level is projected to decrease by about 2% in each of the two subsequent years due to the low birth rate of the last decade.)

Size of the fulltime teaching staff will reflect enrolment — 264,507 elementary-secondary teachers a drop of 5,212; 52,110 at the post-secondary level, up 75 from 1977-78.

Total expenditures are estimated to rise about 7.0% to \$18.3 billion. In 1977 spending on education reached 8.2% of the Gross National Product. Nationally, average per capita expenditure in 1977 was \$733. Provincial breakdown: Québec (\$794), Alberta (\$793), Ontario (\$735), Manitoba (\$657), British Columbia (\$652), Prince Edward Island (\$640), Saskatchewan (\$640), Nova Scotia (\$632), New Brunswick (\$617) and Newfoundland (\$613).

Bachelor degrees granted are expected to decrease by 410 to 86,565. Master degrees and doctorates will increase by 125 to 12,640 and 30 to 1,760.

Advance Statistics of Education 1978-79 gives actual 1976-77 data, preliminary 1977-78 data, current estimates, provincial projections to 1979-80 and national projections to 1980-81 for enrolment, teachers, institutions, degrees and education finance. For further information, contact Z. Zsigmond or E. Rechnitzer (613-995-9685), Projections Section, Education, Science and Culture Division, Statistics Canada, Ottawa K1A 0T6.

Non-residential Building Input Price Indexes

July's Non-residential Building Construction Input Price Index of 192.8 rose 0.4% from June's 192.0 and 5.7% from 182.4 a year earlier. The labour component rose 0.2% (208.8/208.3) and 4.6% (199.7). A jump of 24.4% marks lumber and lumber products 12 months' move from 180.4 to 224.4 and steel and metal work's 187.4 represents a 10.6% rise. Electrical equipment, at 2.3%, suffered the biggest monthly increase of 1.8% (164.9/162.0).

Residential Building Input Price Indexes

Input Price Indexes for residential building construction in July saw the June level of 190.1 rise 0.5% to 191.1 with a 7.3% increase from the 178.1 level a year earlier.

Regionally, the Atlantic provinces level rose 0.3% to 198.2 from June's 197.5, Québec's rose 1.1% to 199.1, Ontario's rose 0.7% to 184.6, the Prairie provinces sank marginally to 199.3 and British Columbia increased 0.2% to 187.9.

For further information, order the *July 1978 issue of Construction Price Statistics Monthly Bulletin* (62-007, 40¢/\$4), or contact Mrs. G.A. John (613-995-5757), Prices Division, Statistics Canada, Ottawa K1A 0V5.

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Farm Input Price Index, 2nd Quarter 1978	62-004	35¢/\$1.40	Fish Freezings and Stocks, June 1978	24-001	40¢/\$4
Field Crop Reporting Series, No. 15, Telegraphic Crop Report, Canada, 1978	22-002	\$5.60/ series of 21	Fruit and Vegetable Preparations, Quarter Ended June 30, 1978	32-017	35¢/\$1.40
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EXTERNAL TRADE			Stocks of Frozen Meat Products, August 1978	32-012	30¢/\$3
Imports by Commodities, May 1978	65-007	80¢/\$8	The Sugar Situation, July 1978	32-013	15¢/\$1.50
Summary of External Trade, June 1978	65-001	40¢/\$4	MERCHANDISING AND SERVICES		
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			Quarterly Estimates of Population for Canada and the Provinces, October 1977-January-April 1978	91-001	35¢/\$1.40
			TRANSPORTATION AND COMMUNICATIONS		
			Telephone Statistics, June 1978	56-002	15¢/\$1.50

User Advisory Offices

When amplification of summaries would be helpful, additional information can often be obtained from the regional User Advisory staff of Statistics Canada or from its Central Inquiries Service, Ottawa (613-992-4734).

Toll free access to statistical information within the New Brunswick, Prince Edward Island and Nova Scotia region is available by direct dialing the User Advisory Services Halifax office, 1-800-565-7192. Throughout Saskatchewan, the Regina office can be reached by dialing 1-800-667-3524. Throughout Alberta, the Edmonton office can be reached by dialing 1-800-222-6400.

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