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Weekly Bulletin



Trade

Fourth quarter exports on a seasonally-adjusted balance of payments basis rose 9.3% with 10.2% for imports, markedly up from the third quarter 3% gains. The \$709 million surplus just about matched the \$746 million in the third quarter and the second's \$726 million. December's exports declined 2.5% to \$4,828 million, imports increasing 3.7% to \$4,700 million, the \$128 million surplus standing against (revised) \$423 million for November and October's \$158 million. For 1978, exports rose 17.2% to \$52.3 billion, slightly more than imports' 17% increase to \$48.8 billion, with a \$3.52 billion surplus (\$2.92 billion in 1977, \$1.34 billion in 1976).

The 2.5% decline in December exports was evident in all sections of trade, wheat's 5.3% fall not helped by shipping delays. End products declined 3.9% but automobiles and trucks increased 6.4% and 16.5%. The 9.3% increase in fourth quarter exports was led by all major sections bar food/feed/beverages/tobacco, down 2%. Wheat declined 11% with exports for 1978 4.5% above 1977.

Fabricated materials, up 10.4%, contributed most in fourth quarter exports. Significantly better than average increases: chemicals, up 25% (51% from 1977), iron and steel, up 19% (36%), lumber, up 15% (35%) and non-ferrous metals, up 14% (31%). Newsprint exports rose 1.4% (20%) and woodpulp 10% (1%). End product exports increased 6.2% following steady increases for the first three quarters and finished the year 23% up on 1977.

Trucks and other major vehicles increased 48% (27% from 1977), automobiles declining 5.3% but rising 11% on 1977. Motor vehicle parts, including engines, increased 7.4% and 22.2% over 1977 and industrial machinery exports rose 3.3% and finished 31% above 1977. Communication equipment was up 7.8% and 36%.

Seasonally-adjusted exports to the United States on a Customs basis increased 31% in December following a 10.2% increase in November. Exports to the U.S. accounted for 70.3% of total exports in 1978, up slightly from 69.9% in 1977. Fourth quarter exports to the U.S. rose 7.8% following increases of 3.4% and 3.9% in the third and second quarters to finish the year 19.2% above 1977 (1977 19.8% and 19.3% in 1976). Exports to the United Kingdom dropped slightly following a 10% decline in

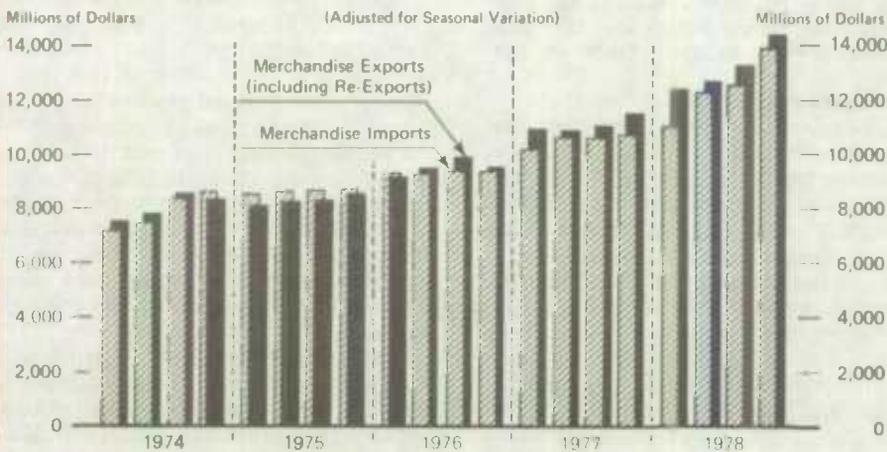
LATEST MONTHLY STATISTICS

		Previous Month	% Change From Year Ago
EMPLOYMENT, INCOME			
Average Weekly Earnings (\$)	Nov. • 272.38p	272.01r	6.3
Labour Income (\$ million)	Nov. • 11,384.3p	11,409.6r	9.7
Persons with Jobs (million)	Dec. 10.14	10.20	4.2
Unemployed	Dec. 870,000	850,000	-1.4
INVENTORIES			
Department Store (\$ million)	Nov. 2,389.9p	2,416.3p	9.1
Manufacturers' Owned (\$ million)	Nov. • 20,175.7p	19,854.8r	9.6
Wholesale (\$ million)	Oct. 8,262.0	8,213.7	11.3
ORDERS			
Manufacturers' New Orders (\$ million)	Nov. • 12,405.8p	12,665.4r	26.8
Manufacturers' Unfilled Orders (\$ million)	Nov. • 13,126.4p	13,011.6r	27.5
PRICES			
Consumer Price Index (1971=100)	Dec. 181.3	180.8	8.4
Industry Selling Price Index (1971=100)	Nov. 194.7	194.2	9.6
Wholesale Price Index (1935-39=100)	Nov. 637.9	635.0	11.5
CONSTRUCTION			
Building Permits (\$ million)	Nov. 977.8	12,014.2	3.9
Housing Starts — Urban Centres (units)	Dec. 12,034	178,678	-10.7
ENERGY			
Coal Production (thousand tons)	Oct. 2,881.7	27,340.4	5.1
Electricity Generation (terawatt hours)	Oct. 27.6	272.6	6.4
Natural Gas Production (billion cu. ft.)	Oct. • 287.6p	2,837.9p	-3.7
Petroleum Refining (million barrels)	Nov. 59.9	600.9	0.2
FOREIGN TRADE			
Exports — Customs Basis (\$ million)	Dec. • 4,587p	52,606p	19.0
Imports — Customs Basis (\$ million)	Dec. • 4,251p	49,605p	18.0
PRODUCTION			
Steel (ingots — thousand tons)	Dec. 1,447.4	16,192.0	9.9
SALES			
Department Store Sales (\$ million)	Nov. 831.4p	6,489.6p	10.2
Manufacturers' Shipments (\$ million)	Nov. • 12,291.0p	118,969.9p	18.2
New Motor Vehicle Sales (\$ million)	Nov. 727.9	9,067.4	13.3
Retail Sales (\$ million)	Nov. 6,233.8p	61,465.0p	12.2
Wholesale Sales (\$ million)	Nov. 5,712.2	57,069.8	11.5

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

Canadian Merchandise Exports and Imports*

Quarter-by-Quarter Movements



Source: Summary of External Trade (65-001)

*Customs Basis

the third, finishing the year 2.7% above 1977. Exports to other members of the European Economic Community: up 22% after 3% third and 2% second quarter declines (increase over 1977, 5%). Exports to Japan: up 4.0%, 21.4% for 1978.

The 3.7% increase in December imports was mostly caused by a 4.5% growth in end product imports, accounting for 62% of total imports in 1978. Automotive imports, 37% of end product imports in 1978, increased 5.1%. Fabricated materials, accounting for 17.6% of 1978 imports, increased 2% in December. Crude materials, 12% of 1978 imports, declined 14%, the most important contributor to the decline being a 39% decrease in crude petroleum following a 56% increase in November. All major sections of trade contributed to a 10.2% increase in fourth quarter imports.

Fabricated materials imports increased 13% in the fourth quarter, up 25% on a year-over-year basis. Chemicals, the largest commodity in this area, increased 11.6% and 30%. Crude material imports increased 22.4% the strongest fourth quarter growth of any major section, and finished the year 10.3% above 1977. Crude petroleum imports, which declined 13% and 11% in the first and second quarters, increased 26% in the third and 30% in the fourth to finish the year 7.3% above 1977. Food/feed/beverages/tobacco imports increased 1% and 13%, fruit and vegetable imports increasing 2.2% following a decline of 7% in the third and finishing the year up 20.4%.

Seasonally-adjusted imports from the United States on a Customs basis increased 7.3% in December and accounted for 70.5% of 1978 imports (1977 70.3%). Fourth quarter imports from the U.S. increased 8.7% and finished 18% above 1977. Imports from the United Kingdom increased 14.5% and were up 25% on the year in contrast to a 2.7% growth in our exports to the U.K. Imports from other E.E.C. countries increased 24% and 27.6% above the year ago level, again in contrast to an increase of 5% in our exports. Imports from Japan declined 8% and finished the year 26% above 1977 levels. Exports to Japan increased 21.4% in 1978, more in line with the growth in imports in spite of the substantial depreciation of the Canadian dollar against the Japanese yen.

For further information on area and commodity trade, order the December 1978 issue of *Summary of External Trade* (65-001, 40¢/\$4).

Real Domestic Product

The seasonally-adjusted Index of Real Domestic Product rose 0.6% to 135.9 in November from October's 135.1, the Index of Industrial Production advancing 0.5% with goods-producing industries up 0.3% and service-producing industries 0.9%.

In goods-producing industries, forestry, fishing and trapping, manufacturing, utilities and agriculture increased. Mining and construction declined. Forestry enjoyed its fourth monthly gain since August. Non-durable and durable manufacturing recorded significant advances: food and beverages, rubber and plastic products, textiles and clothing. Pulp and paper, printing and

publishing declined. In durable manufacturing, primary metals, transportation equipment and electrical products gained. Mining output fell slightly and metal mines significantly but mineral fuels rose sharply. Construction activity declined with most of the decrease originating in residential building.

Service-producing: transportation, storage and communication, trade, finance, insurance and real estate and community, business and personal services recorded increases. Public administration and defence services: unchanged. The most significant increase in finance, insurance and real estate services saw output of security brokers and dealers (including exchanges) advance sharply, the result of major stock issue. In transportation, storage and communication services, increases were recorded in air and railway transport and communication services. Activity in grain elevators declined for the third consecutive month as grainhandling problems continued. Moderate gain in trade accrued from wholesale/retail advances, petroleum products doing best in wholesale trade. Retail: food stores, department stores (to 5%), clothing, and drug stores advanced, new motor vehicles dealers, hardware stores and furniture, television, radio and appliance stores declined significantly. Community, business and personal services rose slightly with increases in education, health and welfare and personal services. Accommodation and food services declined. Public/federal and provincial administration and defence services declined for the fourth consecutive month.

For further information, order the November 1978 issue of *Indexes of Real Domestic Product by Industry* (61-005, 40¢/\$4), or contact R.W. Collins (613-995-0447), Industry Product Division, Statistics Canada, Ottawa K1A 0T6.

Business Conditions

During the first quarter of 1979 manufacturers expect production to be maintained at close to the same level as in the three months ending in December. Results of the January Business Conditions Survey show 55% of the weighted response expect production to be about the same, 28% expect it to be higher and 17% lower. Comparable expectations from the October 1978 survey showed 46% anticipated an unchanged level of production while 38% expected it to be higher and 16% lower. (Management is asked to allow for normal seasonal conditions when responding).

A similar situation appears to exist in the level of new orders where 57% of responding manufacturers reported them at the same level as in the previous period (33% reported rising orders, 10% declining). In October, 47% reported orders at the same level with 43% seeing them rising and 10% declining.

The proportion reporting unfilled orders as higher than normal — 26% — compares with 12% indicating a lower than normal backlog. These results are markedly different from those of the same period in 1978 when 16% felt their orders backlog was

higher than normal and 28% saw it as lower. The level of finished products inventory showed little change with 10% reporting it to be too high and 11% too low (in October, 11% reported stocks of finished goods as too high and 11% as too low).

Reports of production difficulties were very similar to those of the previous period but show some change from the first quarter of 1978. Currently 12% lack skilled labour and 13% raw materials against 6% and 4% a year earlier. When results were classified by economic use or type of market served export-based industries showed the greatest quarter-to-quarter change with 73% expecting production levels to remain about the same and 23% expecting them to be higher (in October, 45% saw no change and 47% expected rises). A similar shift occurred for this group in "new orders".

(Response from the January survey represent over 6,200 manufacturing establishments with shipments accounting for about 50% of all from these industries in 1976. An exchange of 1976 for 1975 census values as weights has brought some changes in proportions from those previously published. October 1978 data now include response received too late for the first release of results from that survey).

For further information, contact Brian Preston (613-996-7008), Manufacturing and Primary Industries Division, Statistics Canada, Ottawa K1A 0V6.

Inventories/Shipments/Orders

Manufacturers' shipments, November, \$12,291.0 million, up 0.1% from revised October's \$12,168.2 million. Eleven months: \$118,969.9 million, up 18.2% from \$100,670.2 million a year earlier.

Manufacturers' shipments, seasonally adjusted, \$11,787.5 million, up 0.3% from \$11,749.4 million a month earlier. Durable goods shipments fell 0.5% to \$5,431.3 million from \$5,461.1 million, non-durable goods shipments rose 1.1% to \$6,356.2 million from \$6,288.3 million.

New orders, seasonally adjusted, \$12,024.6 million, down 3.0% from \$12,396.3 million. Durable goods new orders fell 6.0% to \$5,699.6 million from \$6,066.3 million and non-durable goods new orders 0.1% to \$6,325.0 million from \$6,330.0 million.

Seasonally-adjusted unfilled orders, \$13,334.9 million, up 1.8% from \$13,097.8 million. Total inventory owned rose 0.8% to \$20,304.3 million from \$20,146.3 million. Total inventory held rose 1.2% to \$21,283.9 million from \$21,128.2 million with increases of 1.4%, 0.5% and 0.2% in raw materials, goods in process and finished products.

The seasonally-adjusted ratio of total inventory owned to shipments: 1.72:1 compared with 1.71:1. Finished products to shipments ratio: 0.58:1 as in revised October.

For further information, order the November 1978 issue of *Inventories, Shipments and Orders in Manufacturing Industries* (31-001, 55¢/\$5.50).

Average Earnings

Average weekly earnings rose 6.3% to \$272.38 in November 1978 from \$256.31 in 1977. Average hourly earnings in manufacturing reached \$7.05 (from \$6.57), in construction \$10.56 (\$10.04) and in mining \$9.23 (\$8.43).

Provincial breakdowns show average weekly earnings were highest in British Columbia (\$309.90) and followed by Alberta (\$284.22), Ontario (\$271.32), Québec (\$269.54), Newfoundland (\$256.52), Saskatchewan (\$255.62), Manitoba (\$245.60), New Brunswick (\$238.16), Nova Scotia (\$230.06) and Prince Edward Island (\$197.33).

Average weekly earnings by industry division were: construction \$393.91, mining \$399.46; forestry \$347.86; transportation, communication and other utilities \$320.75; manufacturing \$396.63; finance, insurance and real estate \$252.73; trade \$204.15 and service \$182.78.

For further information, order the November 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.

Unemployment Insurance Statistics

In the week of November 5, 1978, 660,000 people received unemployment insurance benefits, 9% more than a month earlier and 6% fewer than a year earlier. Benefits amounted to \$333 million, up 15% from October and 5% from 1977. Year-to-date, \$4,210 million compared with \$3,590 million in the first eleven months of 1977, up 17%. Average weekly payment rose 9% to \$109.35 from \$100.59 in 1977.

Claims submitted totalled 306,000, up 25% from October. Compared with a year earlier, claims filed declined 4%. Eleven months: 2,529,000 claims, up 2% from 1977.

For further information, order the November 1978 issue of the *Statistical Report on the Operation of the Unemployment Insurance Act* (73-001, 40¢/\$4), or contact George Fincham (613-992-7461), Labour Division, Statistics Canada, Ottawa K1A 0V1.

Mineral Production

Minerals mined, November (November 1977 in brackets), plus 11 months' output totals:

- Gold, 136,635 troy ounces (148,114) — 1,522,086 (1,557,588)
- Silver, 3,699,735 troy ounces (3,957,918) 36,751,225 (41,186,901)
- Refined lead, 20,247 short tons (19,450) 196,163 (189,199)
- Refined zinc, 53,594 short tons (39,736) 489,475 (507,817)
- Primary copper, 40,717 short tons (72,199) 659,394 (802,648)
- Primary nickel, 5,692 short tons (20,522) 131,928 (236,241)

For further information, order the November 1978 issue of *Gold Production* (26-004, 15¢/\$1.50); *Silver, Lead and Zinc Production* (26-008, 15¢/\$1.50); *Copper and Nickel Production* (26-003, 15¢/\$1.50), or contact Art Symons (613-992-0491), Manufacturing and Primary Industries Division, Statistics Canada, Ottawa K1A 0V6.

Railway Carloadings

Railways loaded 19.4 million short tons (17.6 million t) of revenue freight in December, up 8.8% from 1977, with an additional 1.8 million short tons (1.7 million t) from the United States, up 19.7%. Commodities showing notable percentage change: potash (up 52.2%), coal (up 44.0%), wheat (up 34.6%) and copper-nickel ores and concentrates (down 91.1%).

In 1978, loadings decreased 3.7% from the previous twelve-month period to 242.2 million short tons (219.7 million t) with receipts from the U.S. up 1.5%. Loadings of copper-nickel ore and iron ore were significantly lower, due to strike situations, but commodities recording increases include pulpwood chips, pulpwood, newsprint paper, primary and manufactured iron and steel, sulphur, gypsum, potash and coal.

For further information, order the December 1978 issue of *Railway Carloadings* (52-001, 30¢/\$3), or contact L.E. Robbins (613-996-9271), Transportation and Communications Division, Statistics Canada, Ottawa K1A 0T6.

Import/Export, Price/Volume Indexes

Import prices on a fixed-weighted basis stayed put in November although the current-weighted index rose, gaining 2.6% because of changes in the commodity composition of trade. Export prices rose 1.6% on a fixed-weighted basis and 1.8% on a current-weighted basis. Revised 1979 model prices for motor vehicles brought substantial increases in the October price indexes. Import volume, seasonally adjusted, increased fractionally. Average index level for the latest three months: 167.0 compared with 159.0 (third quarter) and 161.0 (second). Export volume rebounded 8% after a decline in October. Average export volume for September-November: 154.5, up 7.5% from third quarter's 143.7.

For further information, order the December 1978 issue of the *Summary of External Trade* (65-001, 40¢/\$4).

Labour Income

Total wages and salaries, November 1978, rose 0.1% to \$10,515.3 million from \$10,503.3 million in October.

Breakdowns for wages and salaries (millions of dollars) were: Newfoundland \$151.1; Prince Edward Island \$28.8; Nova Scotia \$277.8; New Brunswick \$215.3; Québec \$2,599.2; Ontario \$4,304.3; Manitoba \$408.1; Saskatchewan \$315.5; Alberta \$934.9; British Columbia \$1,244.4 and Yukon, Northwest Territories \$35.9.

Supplementary income for November reached \$869.0 million.

See detailed estimates in the November 1978 issue of *Estimates of Labour Income* (72-005, \$1.05/\$4.20).

Housing Starts

Residential building in December in centres of 10,000 population and above was marked by housing starts falling 41.3% to 12,034 from 20,485 a year earlier.

Provincial figures with December 1977 totals in brackets: Ontario 4,169 (7,315), Québec 2,361 (3,471), Alberta 2,345 (3,348), British Columbia 1,657 (2,005), Manitoba 636 (779), Saskatchewan 426 (1,712), Nova Scotia 160 (1,345), New Brunswick 247 (163), Newfoundland 26 (212) and Prince Edward Island seven (135).

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

Sales Financing

Sales finance companies purchased \$325.2 million of retail finance paper in November, up 20.8% from \$269.1 million in 1977, with \$70.8 million for automobiles, \$43.3 million for other consumer goods, \$117.4 million for commercial vehicles and \$93.7 million for other commercial and industrial goods.

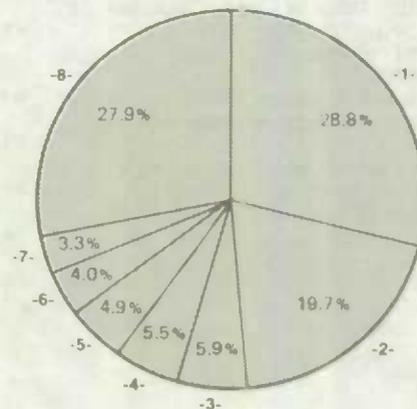
Wholesale financing, third quarter 1978: \$1,902.4 million, up 13.0% from \$1,683.4 million 1977.

For further information, order the November 1978 issue of *Sales Financing* (63-013, 30¢/\$3).

Canada's Mineral Production, 1978

\$19,661,339,000

	Millions
-1- Crude Petroleum.....	\$5,660
-2- Natural Gas.....	\$3,882
-3- Iron Ore.....	\$1,150
-4- Copper.....	\$1,078
-5- Natural Gas By-Products.....	\$957
-6- Zinc.....	\$791
-7- Nickel.....	\$652
-8- Other Minerals.....	\$5,491



Source: Canada's Mineral Production, Preliminary Estimate 1978 (26-202)



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These publications released January 26 — February 1

	Cata- logue	Price per issue/year		Cata- logue	Price per issue/year
AGRICULTURE					
Dairy Factory Products, December 1978	32-002	15¢/\$1.50	Oil Pipe Line Transport, October 1978	55-001	30¢/\$3
Grains and Oilseeds Review, November 1978	22-007	40¢/\$4	Particle Board, November 1978	36-003	15¢/\$1.50
Grain Milling Statistics, November 1978	32-003	30¢/\$3	Production and Disposition of Tobacco Products, December 1978	32-022	15¢/\$1.50
Production of Eggs and Poultry, November 1978	23-003	30¢/\$3	Production and Shipments of Steel Pipe, Tubing and Fittings, November 1978	41-011	30¢/\$3
EDUCATION, SCIENCE AND CULTURE					
Teachers in Universities, 1975-76	81-241	\$1.40	Products Made from Canadian Clays, November 1978	44-005	15¢/\$1.50
FINANCIAL FLOWS AND MULTI- NATIONAL ENTERPRISES					
Travel Between Canada and Other Countries, 1977	66-201	\$1.40	Radio and Television Receiving Sets, November 1978	43-004	30¢/\$3
GROSS NATIONAL PRODUCT					
Provincial Economic Accounts, Experimental Data, 1962-1977	13-213	\$2.80	Sanitaryware, November 1978	41-012	15¢/\$1.50
LABOUR					
Employment Earnings and Hours, October 1978	72-002	70¢/\$7	Specified Chemicals, November 1978	46-002	15¢/\$1.50
Trusteed Pension Plans Financial Statistics, 1977	74-201	\$1.05	Specified Domestic Electrical Appliances, November 1978	43-003	15¢/\$1.50
LABOUR FORCE SURVEY					
Historical Labour Force Statistics — Actual Data, Seasonal Factors, Seasonally Adjusted Data, 1978	71-201	\$2.10	Stoves and Furnaces, November 1978	41-005	30¢/\$3
MANUFACTURING AND PRIMARY INDUSTRIES					
Canada's Mineral Production, Preliminary Estimate, 1978	26-202	70¢	SERVICE BULLETINS		
Concrete Products, November 1978	44-002	15¢/\$1.50	Fruit and Vegetable Preservation —		
Consumption, Production and Inventories of Rubber, November 1978	33-003	30¢/\$3	Vol. 7: 1978, No. 2, Pack of Processed Raspberries; No. 3, Pack of Processed Strawberries		
Domestic and Farm Water Systems, November 1978	41-015	15¢/\$1.50	32-023	/ \$1.40	
Domestic Refrigerators and Freezers, November 1978	43-001	15¢/\$1.50	MERCHANDISING AND SERVICES		
Domestic Washing Machines and Clothes Dryers, November 1978	43-002	15¢/\$1.50	New Motor Vehicle Sales, November 1978		
Factory Sales of Electric Storage Batteries, November 1978	43-005	15¢/\$1.50	63-007	30¢/\$3	
Fish Freezings and Stocks, October 1978	24-001	40¢/\$4	63-008	15¢/\$1.50	
Footwear Statistics, November 1978	33-002	30¢/\$3	63-005	55¢/\$5.50	
Fruit and Vegetable Production, January 1979	22-003	40¢/\$3	63-204	\$1.05	
Iron Castings and Cast Iron Pipe and Fittings, November 1978	41-004	15¢/\$1.50	PRICES		
Monthly Review of Canadian Fisheries Statistics, October 1978	24-002	40¢/\$4	Construction Price Statistics, January 1979		
			62-007	40¢/\$4	
			TRANSPORTATION AND COMMUNICATIONS		
			Air Carrier Traffic at Canadian Airports, First Quarter 1978		
			51-005	\$1.75/\$7	
			Radio Broadcasting, September 1978		
			56-003	15¢/\$1.50	
			Railway Freight Traffic, Second Quarter 1978		
			52-002	\$1.05/\$4.20	
			Railway Operating Statistics, October 1978		
			52-003	30¢/\$3	
			Road and Street Length and Financing, 1975		
			53-201	70¢	
			SERVICE BULLETIN		
			Aviation Statistics Centre — Vol. 11.		
			No. 1, Canadian Air Transport Industry, Summary Statistics, January-June 1978		
			51-004	/\$4.20	