

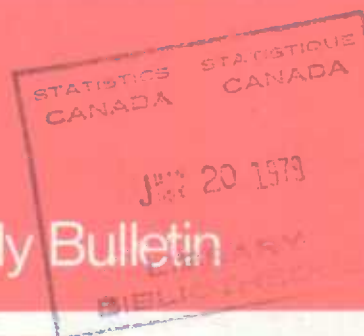


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Weekly Bulletin



Gross National Product

Preliminary estimates of the National Income and Expenditure Accounts indicate Gross National Product, seasonally adjusted at annual rates, increased 3.8% in first quarter, 1979. After adjustment for price changes this represents real growth of 1.7%. This is broadly consistent with the rise in Real Domestic Product after allowing for a return to more normal levels of dividend payments abroad following the exceptionally high fourth quarter outflows. Excluding international transactions in investment income, the volume of production on a domestic basis increased an average of one-and-a-quarter per cent in each of the last two quarters.

The increase in the volume of GNE this quarter was the result of an acceleration in all the major sectors of domestic expenditure with the exception of construction activity. The strengthening of domestic expenditure more than offset a decline in external demand, particularly by the United States where production was virtually unchanged in the first quarter. Since merchandise imports rose by 4% in volume, Canada's external trade in goods constituted a substantial drag on the economy in the first three months of 1979.

The growth of personal expenditure this quarter, largely in durable goods, appears to have been somewhat exaggerated by a natural recovery from the low fourth quarter level and particularly strong sales in Québec. Business fixed investment was virtually unchanged this quarter as a decline in construction activity offset the fourth consecutive strong gain in machinery and equipment investment. Non-farm business inventory accumulation again accelerated sharply this quarter and accounted for a substantial portion of the increase in expenditure.

Total gross fixed capital formation was virtually unchanged in volume in the first quarter. The major source of weakness was once again residential construction, which is estimated to have fallen by about 5% as a result of the continued low level of housing starts. The volume of business investment in plant and equipment rose 1.3% as a decline in non-residential construction was out-weighted by a 3.9% gain in investment in machinery and equipment. The first quarter level of machinery and equipment investment rests 9.5% above the 1978 average,

LATEST MONTHLY STATISTICS

EMPLOYMENT, INCOME

| | | | Previous Month | % Change From Year Ago |
|------------------------------|------|-----------|----------------|------------------------|
| Average Weekly Earnings (\$) | Mar. | 280.26p | 277.78r | 7.7 |
| Labour Income (\$ million) | Feb. | 11,241.6p | 11,174.7p | 9.4 |
| Persons with Jobs (million) | May | 10.363 | 10.004 | 3.7 |
| Unemployed | May | 836,000 | 943,000 | -9.1 |

INVENTORIES

| | | | | |
|-----------------------------------|------|-----------|-----------|------|
| Department Store (\$ million) | Mar. | 2,233.3 | 2,013.5 | 21.8 |
| Manufacturers' Owned (\$ million) | Mar. | 22,759.5p | 22,065.5r | 17.2 |
| Wholesale (\$ million) | Mar. | 10,051.7p | 9,603.7p | 24.4 |

ORDERS

| | | | | |
|---|------|-----------|-----------|------|
| Manufacturers' New Orders (\$ million) | Mar. | 13,717.3p | 11,930.7r | 23.2 |
| Manufacturers' Unfilled Orders (\$ million) | Mar. | 15,272.8p | 14,599.8r | 35.9 |

PRICES

| | | | | |
|---|------|--------|--------|------|
| Consumer Price Index (1971=100) | May* | 189.7 | 187.9 | 9.3 |
| New House Price Index (1976=100) | Apr. | 108.0 | 108.0 | 2.8 |
| Non-residential Building Input (1971=100) | Mar. | 204.9 | 203.5 | 9.5 |
| Residential Building Input (1971=100) | Mar. | 205.2 | 203.3 | 10.4 |
| Industry Selling Price Index (1971=100) | Apr. | 210.8p | 209.1r | 12.6 |

CONSTRUCTION

| | | | | |
|--|------|-------|---------|-------|
| Building Permits (\$ million) | Mar. | 990.3 | 2,154.1 | 1.6 |
| Housing Starts — Urban Centres (units) | Mar. | 8,134 | 26,170 | -35.4 |

ENERGY

| | | | | |
|---|-------|---------|----------|-----|
| Coal Production (thousand metric tonnes) | Mar.* | 2,724.0 | 8,116.9 | 5.3 |
| Electricity Generation (terawatt hours) | Mar. | 31.5 | 98.1 | 3.9 |
| Natural Gas Production (million cubic metres) | Feb. | 9,268.9 | 19,656.1 | 7.2 |
| Petroleum Refining (million barrels) | Apr.* | 8.67p | 37.1p | 9.8 |

FOREIGN TRADE

| | | | | |
|--------------------------------------|------|--------|---------|------|
| Exports — Customs Basis (\$ million) | Apr. | 4,776p | 19,549p | 21.0 |
| Imports — Customs Basis (\$ million) | Apr. | 4,850p | 19,636p | 28.6 |

PRODUCTION

| | | | | |
|--------------------------------|------|---------|---------|-----|
| Steel (ingots — thousand tons) | May* | 1,568.5 | 7,312.5 | 8.4 |
|--------------------------------|------|---------|---------|-----|

SALES

| | | | | |
|---------------------------------------|-------|-----------|-----------|------|
| Department Store Sales (\$ million) | Apr. | 606.3p | 2,147.5p | 10.5 |
| Manufacturers' Shipments (\$ million) | Mar. | 13,044.3p | 35,988.1p | 23.9 |
| New Motor Vehicle Sales (\$ million) | Apr. | 1,053.1 | 3,622.5 | 20.8 |
| Retail Sales (\$ million) | Apr.* | 6,019.3p | 22,185.5p | 13.1 |
| Wholesale Sales (\$ million) | Apr.* | 5,566.2p | 22,509.6p | 21.3 |

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

Canada's Gross National Product (GNP)

Quarter-to-Quarter Change

All Data Seasonally Adjusted



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

implying more growth for the year than is consistent with the *Public and Private Investment in Canada* estimate of intentions. Total business investment in plant and equipment is now about 8% above the level of a year earlier, the strongest such gain since 1975.

A 1.7% decline in the volume of exports would have been larger but for sharply higher exports of crude materials, notably crude petroleum and natural gas. The fact that exports were buttressed by increases in goods whose export levels are largely determined by governments and not market conditions, with increased export prices, explains the unusually high level of nominal exports despite the weak performance of production in the United States in the first quarter.

A 1.3% increase in real personal expenditure was largely the result of strong durable goods sales which advanced 5.8% in volume terms. Demand for some durable and semi-durable goods was particularly strong in Québec in part due to the expected re-imposition of sales taxes on furniture and clothing. Automobile sales exhibited robust growth of about 15%.

Most notable development in terms of factor incomes was a 12.2% gain in corporate profits which are now 34.3% above the level of a year earlier. Increased value of exports and personal expenditure and continued improvement in profit margins as prices increased helped to stimulate corporate profits. Part of the very strong performance of corporate profits in the last two quarters was the result of a sharply higher level of inventory valuation adjustment which advanced moderately in the first quarter following the rapid increase of the previous quarter. All sectors recorded strong profit increases this quarter, with further gains in manufacturing and mining of particular importance. Profits in manufacturing are now estimated to be over 60% above the level of first quarter, 1978.

A 2.3% increase in personal income largely originated in the rise in labour income and continued strong growth in investment income received by persons as government transfers to persons declined. Personal income taxes advanced 4.7% which restrained the growth of personal disposable income to 1.9%. With a 3.2% increase in personal expenditure the personal savings rate fell from 9.9% to 8.6%.

For further information, order *National Income and Expenditure Accounts, first quarter, 1979* (13-001, \$1.05/\$4.20).

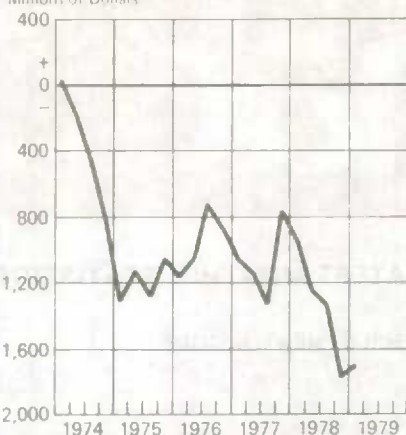
Food Service

The restaurants, caterers and taverns industry survey in 1977 indicated industry total sales of \$5,953,942,000, an increase of 10.1% over revised 1976 sales of \$5,409,495,000.

For further information, contact the Service Trades Section (613-996-9301), Merchandising and Services Division, Statistics Canada, Ottawa K1A 0T6.

Canadian Balance of International Payments

Current Account — Seasonally Adjusted
Millions of Dollars



Source: Quarterly Estimates of the Canadian Balance of International Payments (67-001)

Life Tables, 1975-1977

Expectation of life at birth for males and females is 70.19 and 77.48 years according to life tables for Canada and provinces for the years 1975-1977, an increase of 1.2% for males and 1.5% for females from 1970-1972.

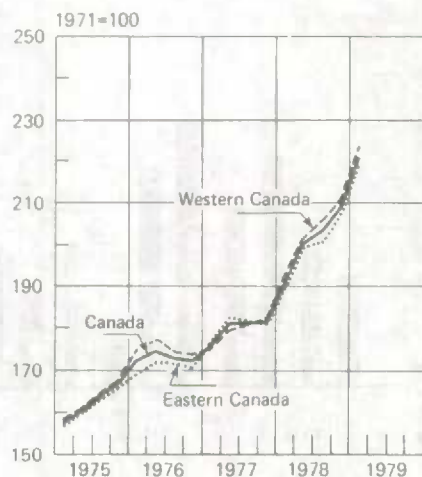
The tables will be published in *Life Tables, Canada and Provinces, 1975-1977* (catalogue 84-532, \$1.05). For further information, contact D. Nagnur (613-995-9593), Demographer, Vital Statistics and Disease Registries Section, Health Division, Statistics Canada, Ottawa K1A 0T6.

Steel Ingots

Preliminary estimate of steel ingots production for the month of May 1979 was 1,568,537 short tons (1 422 953 t).

For further information, order the May 1979 issue of *Steel Ingots and Pig Iron* (41-002, 15¢/\$1.50), or contact J.L. Barnes (613-992-0388), Manufacturing and Primary Industries Division, Statistics Canada, Ottawa K1A 0V3.

Farm Input Price Indexes



Source: Farm Input Price Indexes (62-004)

Consumer Price Index

May's Consumer Price Index rose 1.0% to 189.7 from April's 187.9. Between May 1978 and May 1979 the rise reached 9.3%, down from the 9.8% of a year earlier. Transportation charges and tobacco and alcohol prices counted for about 50% of May's rise. The index for all-items-excluding-food advanced 1.1% (0.6% in April) with food prices continuing to show some moderation (up 0.6% against April's 1.0%).

The 0.6% increase in the food index was largely attributable to higher prices for restaurant meals. The food-away-from-home index rose by 1.5% in May, up 13.3% from 1978. Dairy products, mainly reflecting increased milk prices in Ontario, Alberta and British Columbia, and fresh fruit were largely responsible for the 0.3% increase in the food-at-home index. Dampening the impact: lower prices for selected fresh vegetables and for most beef and pork cuts. The current monthly increase in the food-at-home index took this index 13.7% above its 1978 level.

Air fares boosted by seasonal rates on selected flights and an ending promotional sales plus increased prices for alcohol consumed at home in all provinces (except Alberta) were largely responsible for a 1.1% increase in the index for all-items-excluding-food. Other notable contributors: recreational equipment, new cars and shelter charges for both rented and owned accommodation. Increases also affected selected clothing items and services. Between May 1978 and May 1979 the index for all-items-excluding-food advanced 8.0% (7.5% a year earlier).

In terms of goods and services the price level for goods, including food, advanced 0.9% and that for services increased 1.2%. May 1978 to May 1979 the price level for goods advanced 10.8%, that for services 7.1%.

On a seasonally-adjusted basis, the Consumer Price Index advanced 0.7% between April and May (a 0.2% decrease in the food index and a 1.0% increase in all-items-excluding-food).

Between April and May, consumer prices rose in all 15 cities monitored. Advances ranged from 0.6% registered in Edmonton to 1.3% observed in Winnipeg. In nine cities, consumer prices rose by 1.0% or more. Factors contributing to the differing rates of increase lay in varying rates of price movement for food and alcohol.

Percentage increases with annual change in brackets: St. John's 1.2% (10.4%), Charlottetown/Summerside 0.7% (8.7%), Halifax 1.2% (9.7%), Saint John 1.2% (10.0%), Québec 0.7% (9.2%), Montréal 0.8% (9.2%), Ottawa 1.1% (9.1%), Toronto 1.2% (9.7%), Thunder Bay 0.9% (8.6%), Winnipeg 1.3% (9.8%), Saskatoon 1.1% (8.5%), Regina 1.0% (7.5%), Edmonton 0.6% (8.9%), Calgary 0.8% (8.4%) and Vancouver 1.0% (7.8%).

For further information, order the May 1979 issue of *Consumer Price Indexes for Regional Cities* (62-009, 30¢/\$3).

Building Permits, March, Adjusted

Value of proposed construction reflected by building permits rose 22.3% to a level of \$1,165.5 million from \$953.2 million in February. Both residential and non-residential permits contributed to the increase. In 1978, the value was \$1,013.2 million.

Although the number of new dwellings authorized was marginally lower in March (14,076) than in February (14,350) the value of residential permits rose 17.3% to \$612.5 million from \$522.4 million in February, reflecting the preference of builders for construction of single-detached homes. The number of dwelling units of this type rose to 8,968 from 7,461 in February while the number of multiple dwellings decreased to 5,108 units from 6,889 in February.

In the non-residential sector the value of new construction authorized totalled \$553.0 million in March, up 28.4% from the February level of \$430.8 million. Industrial projects' value rose to an estimated \$140.6 million in March from \$93.9 million in February while commercial projects increased to \$314.0 million from \$241.1 million. Publicly-initiated projects, valued at \$98.4 million, were only marginally higher than in February (\$95.8 million).

Early returns for April indicate a continuance of the strength observed in the non-residential sector during March.

For further information, order the March 1979 issue of Building Permits (64-001, 70¢/\$7), or contact J.P. D  sle (613-995-215), Construction Division, Statistics Canada, Ottawa K1A 0T6.

Farm Cash Receipts

Farmers' cash receipts from January-April farming operations totalled \$4,665.2 million compared with \$3,787.4 million in 1978. Receipts from farming operations by province with 1978 comparisons in brackets: Prince Edward Island \$46.2 million (\$32.3 million), Nova Scotia \$54.0 million (\$43.6 million), New Brunswick \$47.2 million (\$34.6 million), Qu  bec \$571.9 million (\$457.9 million), Ontario \$1,250.6 million (\$1,029.7 million), Manitoba \$405.8 million (\$322.7 million), Saskatchewan \$1,097.0 million (\$891.7 million), Alberta \$1,028.4 million (\$823.0 million) and British Columbia \$164.1 million (\$151.9 million).

For further information, order the January-April 1979 issue of Farm Cash Receipts (21-001, 30¢/\$3), or contact P. Lys (613-995-4895), Agriculture Division, Statistics Canada, Ottawa K1A 0L7.

Farm Net Income, 1978

Revisions to farm net income show that the 1978 realized net income from farming operations totalled \$3,318.1 million, a 21.4% increase from 1977's \$2,732.9 million. Cash receipts rose 16.8% to \$11,810.1 million from \$10,114.6 million with farm operating expenses rising 15.1% to \$8,593.6 million (\$7,555.6 million).

For further information, order the 1979 issue of Farm Net Income Preliminary 1978 (21-202, 70¢), or contact Mike Trant (613-995-4895), Agriculture Division, Statistics Canada, Ottawa K1A 0T6.

Cheques Cashed

Value of cheques cashed in 50 clearing centres in April totalled \$309,852 million, 29.7% above a year earlier. Payments in seven of the 10 provinces rose in comparison. Debits increased in Prince Edward Island by 10.3%, Nova Scotia 28.5%, New Brunswick 31.5%, Ontario 49.0%, Manitoba 23.5%, Alberta 27.4% and British Columbia 23.9%. Debits decreased in Newfoundland by 1.3%, Qu  bec 3.2% and Saskatchewan 10.7%.

For further information, contact the Financial Institutions Section (613-995-9771), Business Finance Division, Statistics Canada, Ottawa K1A 0T6.

A User's Guide To 1976 Census Data On Household And Families Is a working paper reviewing household and family concepts and definitions used in the 1976 Census, questions used to collect information to support the concepts and procedures employed in collection and processing of household and family data. The paper also deals with changes in definitions and universes that affect the comparability of 1976 Census household and family data with those of earlier censuses (to 1951). For a copy of working paper #1 — HF79 (1976 EVAL), contact Brian Harrison (613-995-7946), Census Characteristics Division, Statistics Canada, Ottawa K1A 0T6.

Retail Trade

Seasonally-adjusted retail sales for April were \$6,176.1 million, a decrease of 3.6% from \$6,408.2 million in March. Sales were higher in 11 of the 28 trade groups. The largest increases were registered by all other food stores (+10.0%) and florists (+7.9%) while household furniture stores (-25.1%), furniture, TV, radio and appliance stores (-15.9%) and garages (-12.2%) had the largest decreases. Only Prince Edward Island (+3.2%), Manitoba (+1.2%) and British Columbia (+1.3%) showed increased sales over March; all other provinces reported decreases ranging from 5.0% for Qu  bec to a fractional decrease for Alberta.

Total retail trade without seasonal adjustment reached \$6,019.3 million, an increase of 9.8% over 1978. Sales increased in all trade groups except specialty shoe stores (-7.2%). The largest increases were recorded by florists (+28.5%), used car dealers (+24.5%) and automotive parts and accessories stores (+17.3%). All provinces reported increased sales over April 1978, ranging from 15.9% for New Brunswick to 5.1% for Manitoba. Montr  al sales rose 10.5%; Toronto, 5.3%; Winnipeg, 2.3%; and Vancouver, 7.0%.

Revised total retail trade, without seasonal adjustment, for March was \$6,130.7 million, up 15.9% from 1978.

For further information, order the April 1979 issue of Retail Trade (63-005, 55¢/\$5.50), or contact the Retail Trade Section (613-996-9304), Merchandising and Services Division, Statistics Canada, Ottawa K1A 0V4.

Census of Manufactures, 1977

Preliminary figures from the 1977 Census of Manufactures show that 27,715 establishments reported shipments of goods of their own manufacture valued at \$108,856 million, up 10.8% from a restated \$98,281 million in 1976. The value of total shipments plus other revenues for these establishments was reported at \$126,270 million, an increase of 11.3% over the 1976 total of \$113,417 million.

As employers, these manufacturers provided work for 1.70 million people, down 2.2% from 1.74 million in 1976. They paid out a total of \$23,592 million in salaries and wages, up 8.2% from \$21,800 million the previous year.

For further information, contact R. Staveley (613-996-4991), Manufacturing and Primary Industries Division, Statistics Canada, Ottawa K1A 0T6. Complete data will be published later in Manufacturing Industries of Canada: National and Provincial Areas, 1977 (31-203, \$2.80).

Refined Petroleum Products

Refineries produced 8 670 000 cubic metres of refined petroleum products in April, an increase of 13.5% from 7 640 000 a year earlier. Net sales of all refined petroleum products: 7 722 000 cubic metres, up 3.8% from 7 442 000.

For further information, order the April 1979 issue of Refined Petroleum Products (45-004, 40¢/\$4), or contact G.R. Kitchen (613-992-4021), Manufacturing and Primary Industries Division, Statistics Canada, Ottawa K1A 0V6.

Farm Prices Index

The March Index of Farm Prices of Agricultural Products stood at 241.7, up 2.2% from revised February's 236.6.

The Index has been rebased to a new time and weight base with 1971 the reference year. For further information, contact Peter Lys or George Beelen (613-995-4895), Agriculture Division, Statistics Canada, Ottawa K1A 0T6.

Wholesale Trade

Sales by wholesale, April: \$5,566,185,000, up 12.6% from \$4,942,241,000 a year earlier. Inventories rose 24.8% to \$10,284,505,000 from \$8,241,655,000.

For further information, order the April 1979 issue of Wholesale Trade report (63-008, 15¢/\$1.50).

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