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Weekly Bulletin

## Trade

April 11, 1980

On a seasonally-adjusted balance of payments basis, exports increased 4.3% or \$260 million in February to \$6.25 billion following a small 0.5% decline in January. As imports fell 4.2% (\$238 million) to \$5.43 billion following a 5.8% increase in January, the merchandise trade surplus increased to \$815 million from \$317 million in January (\$658 million in December).

Rate of increase for the export and import short-term trend cycles continued to diminish from peak increases in August 1979. Exports increased 3.6% in August and 1.1% in December. Imports increased 2.6% in August and 0.3% in December. Rate of increase for exports is still higher than for imports but has been diminishing slightly faster than imports since October 1979. Consequently the short-term trend cycle for the merchandise trade balance has continued to increase although at a slightly diminishing rate (\$67 million in September to \$292 million and \$46 million in December to \$555 million).

In a commodity analysis of exports (seasonally adjusted, Customs basis), increase in February domestic exports flowed from gains for fabricated and crude material exports and food, feed, beverages and tobacco exports following declines in January. End product exports declined 4.6%. Commodities contributing most to the increase in February exports were metallic ores, lumber and wheat. Fabricated material exports increased 8.3% to \$2.6 billion after declining 1% in January. Lumber exports increased 32% or \$90 million to \$375 million, chemical exports 24% to \$205 million, non-ferrous metals 8% to \$595 million and newsprint 8% to \$350 million. Fertilizer exports declined 18% to \$85 million and iron and steel 4% to \$140 million. Crude materials increased 11% to \$1.3 billion mainly as a result of a 40% (\$132 million) increase in metallic ore exports to \$470 million following a 12% decrease in January. Natural gas exports declined 7% to \$335 million and crude petroleum 1.5% to \$300 million. Food, feed, beverages and tobacco increased 7% to \$555 million. Wheat exports increased 35% or \$62 million to \$240 million, following three consecutive monthly declines. End product exports declined 4.6% to \$1.7 billion. Most major end product commodities declined — 32% for agricultural machinery to \$80 million, trucks and other motor vehicles 8% to \$190 million (down 16% in January).

## LATEST MONTHLY STATISTICS

### EMPLOYMENT, INCOME

			Previous Month	% Change From Year Ago
Average Weekly Earnings (\$)	Dec.	293.5	296.62r	8.9
Labour Income (\$ million)	Jan.	12,221.8p	12,370.4p	10.4
Persons with Jobs (million)	Mar.*	10.29	10.24	3.4
Unemployed	Mar.*	969,000	949,000	-0.7

### INVENTORIES

Department Store (\$ million)	Jan.	2,371.8p	2,175.2p	19.8
Manufacturers' Owned (\$ million)	Jan.	26,415.8p	25,835.3r	23.8
Wholesale (\$ million)	Jan.	11,711.6p	10,609.7p	20.7

### ORDERS

Manufacturers' New Orders (\$ million)	Jan.	13,148.2p	11,959.6r	11.3
Manufacturers' Unfilled Orders (\$ million)	Jan.	17,385.0p	16,745.1r	21.8

### PRICES

Consumer Price Index (1971=100)	Feb.	201.8	200.1	9.4
Non-food (CPI) Component	Feb.	186.8	185.4	9.2
New House Price Index (1976=100)	Jan.	113.4	113.0	5.6
22-city Composite Wage, Building (1971=100)	Jan.*	230.9	230.9	5.1
Industry Selling Price Index (1971=100)	Feb.*	240.1p	238.4r	15.2

### CONSTRUCTION

Building Permits (\$ million)	Jan.*	753.8p	753.8p	41.2
Housing Starts — Urban Centres (units)	Feb.*	6,445	16,934	-6.1

### ENERGY

Coal Production (thousand metric tonnes)	Jan.*	2,596.8	2,596.8	-9.8
Electricity Generation (terawatt hours)	Jan.*	35.6	35.6	2.4
Natural Gas Production (million cubic metres)	Dec.*	10,147.2	105,577.6	6.1
Petroleum Refining (million cubic metres)	Jan.	9.75p	9.75p	0.7

### FOREIGN TRADE

Exports — Balance of Payments Basis (\$ million)	Jan.	5,886p	5,886p	17.8
Imports — Balance of Payments Basis (\$ million)	Jan.	5,509p	5,509p	17.6

### PRODUCTION

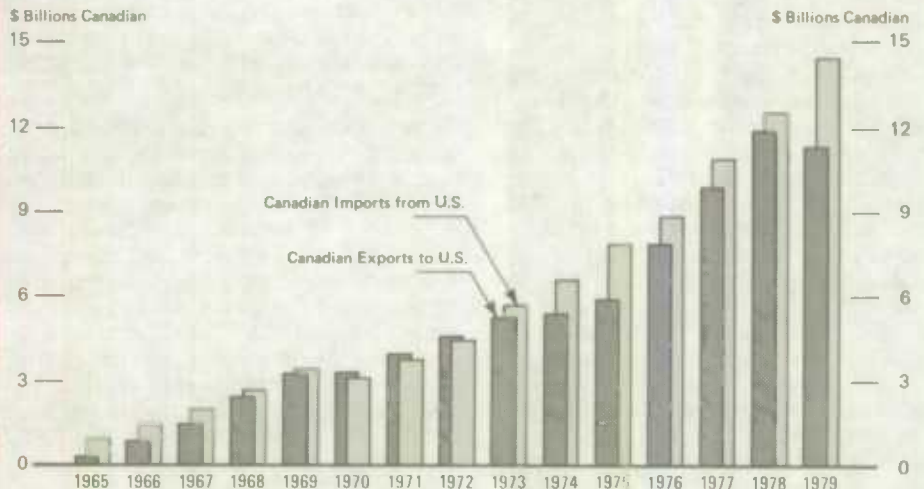
Steel (ingots — thousand metric tonnes)	Feb.	1,302.0	2,695.5	-5.7
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### SALES

Department Store Sales (\$ million)	Feb.*	521.4p	1,079.8p	26.4
Manufacturers' Shipments (\$ million)	Jan.	12,508.2p	12,508.2p	11.3
New Motor Vehicle Sales (\$ million)	Feb.*	885.9	1,654.3	12.4
Retail Sales (\$ million)	Jan.	5,645.9	5,645.9	12.7
Wholesale Sales (\$ million)	Jan.	5,637.4p	5,637.4p	15.5

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

## Canada—United States Trade in Automotive Products





parts 5% to \$290 million, aircraft and other transportation equipment 7% to \$165 million, communication equipment 6.5% to \$230 million and industrial machinery 1.5% to \$185 million. Passenger car exports increased 18% to \$350 million following a 17% decrease in January. Overall exports of motor vehicle products were up 2.6% to \$830 million.

The short-term trend cycle continued to grow more slowly for fabricated and crude materials in December and declined for end products and food, feed, beverages and tobacco. Fabricated materials increased 2.6% in December down from a 3.8% increase in August. Non-ferrous metals continued to climb with increases of close to 14% or more during October, November and December 1979. Among forest product commodities, newsprint exports continued to grow strongly with around 4.5% increases per month for October, November and December. Woodpulp increased 1.8%, down from a 2.6% increase in October 1979. Lumber exports continued to decline from an October peak with a 2.7% decrease in December. Chemicals continued to decline from a September 1979 peak with a 2.9% decrease in December. Following declines in the third quarter of 1979, iron and steel exports increased about 1% in November and December. Petroleum and coal product exports — following very strong growth in the first half of the year — continued to decline but at a diminishing rate with a 1% decrease in December down from a 5.5% decrease in September. Fertilizer exports have leveled off at about \$95 million since October 1979 following strong growth in the first half of the year. Crude material exports continued the steady growth which started eighteen months ago in July 1978 with increases of around 3.5% per month since August 1979. Metallic ores, natural gas and crude petroleum were responsible for this continued growth. Metallic ores increased 3.5% per month during October, November and December 1979. Natural gas increased 8% a month in October and November and 7% in December 1979. Crude petroleum was up around 9% per month during October, November and December 1979. Coal and asbestos exports peaked in September 1979 and declined 3% and 7% respectively in December. Exports of end products — recovered from a brief decline in the second quarter — weakened in the fourth quarter with declines of 0.4% in November and 1% in December. The decline in motor vehicle products and motor vehicle parts which started at the beginning of 1979 continued. The short-term trend cycle for motor vehicle products declined 1% in October, 2% in November and 2.5% in December. Parts exports fell in the fourth quarter 3.4%, 4.8% and 5.1%. Decline in automobile exports starting in November 1978 and leveling off temporarily in the third quarter continued in the fourth quarter with decreases of 1.3%, 1.8% and 1.2%. Truck exports, down nearly 50% in the second quarter, recovered a little in the second half

of the year but fell 0.9% in December. Industrial machinery picked up from increases of 0.8% in September and October 1979 to 1.3% and 1.4% increases in November and December. Agricultural machinery also picked up — from a 0.4% decline in October to a 2.2% increase in December. Growth in communication equipment exports was down from a 5.1% increase in September 1979 to a 1.3% increase in December. Growth in aircraft and other transportation equipment has leveled off from an increase of 2.1% in September to a slight decrease in December. The trend cycle for food, feed, beverages and tobacco declined 1.8% in December following growth of about 33% in the previous five months. Cereal products were mainly responsible for the decline in December.

A commodity analysis of imports (seasonally adjusted, Customs basis) shows declines in imports of end products and fabricated materials — particularly motor vehicle products and non-ferrous metals — outweighed a large increase in crude petroleum imports to produce a net decline in February imports. End product imports were down 6.6% to \$3 billion. Motor vehicle products fell 7% to \$1 billion. Parts were down 18% or \$116 million to \$515 million and trucks and other motor vehicles fell 7% to \$105 million. Passenger cars were up 13% to \$390 million following an 18% decrease in January. Nearly all the remaining major end product commodities decreased, industrial machinery 6% to \$500 million, aircraft and other transportation equipment 9% to \$180 million, communication equipment 1.5% to \$175 million, computers and office machines 6.4% to \$120 million, other equipment 1.2% to \$315 million and apparel and footwear 14% to \$105 million. Agricultural machinery imports increased 10.5% in February to \$205 million following a 27% increase in January. Fabricated material imports fell 16.5% to \$1 billion. Notable decreases were non-ferrous metals 40% (\$91 million) to \$135 million, chemicals 11% to \$270 million, iron and steel 6% to \$135 million and basic hardware products 9.5% to \$90 million. Crude material imports rose 47% to \$1.2 billion largely as a result of a 42% (\$204 million) increase in crude petroleum imports to \$695 million. Food, feed, beverages and tobacco imports fell 13% to \$320 million.

On a short-term trend cycle basis, end products, fabricated materials and food, feed, beverages and tobacco declined in December. Crude material imports increased though at a slower rate than in the preceding five months. End product imports — level for most of the year — continued a moderate decline that started in October and decreased 0.8% in November and December. Motor vehicle product imports (21% of total imports based on the December trend-cycle value) continued the decline which started in April with a 2.2% decrease in November and a 2.5% decrease in December and now stand about

12% below the April peak. Parts imports (11% of total imports) continued the substantial decline since a February 1979 peak, falling 2.2% in November and 2.5% in December. Truck imports — on a plateau for the first nine months of 1979 — dropped 4.7% in November and 6.9% in December. Passenger car imports, increasing steadily throughout 1979, eased a little from increases of 1% a month in October and November to an increase of 0.5% in December. Industrial machinery imports peaked in October and declined slightly in November and December. Agricultural machinery imports peaked in August declining around 3% a month in the last three months of the year. Little changed in the level of communication equipment imports during the last eight months of 1979. Computer and office machinery continued to increase but at a diminishing rate, down from an increase of 4% in September to an increase of 2% in December. Other equipment (5.6% of total imports) increased 0.9% in October and 0.2% in December. Apparel and footwear imports increased 1.6% in November and 2.3% following three months of declines in the third quarter of 1979. Aircraft and other transportation equipment imports, having doubled in 1978 and increased over 25% in 1979, declined 1.1% in December. Fabricated material imports, up almost 40% in 1978 and about 25% in 1979, fell 1% in December following increases of about 4.5% a month in August and September. Non-ferrous metals, up almost 150% since April, peaked in November and fell 4.6% in December. Iron and steel and textile imports continued to decline. Iron and steel imports, up almost 50% in the first nine months of 1979, fell 2.3% in October and 4.1% in December. Textile imports peaked in July and decreased 2.8% in November and 3.2% in December. Chemical and basic hardware imports have leveled off. Chemicals increased 0.5% in December down from an increase of 1.9% in September. The rate of increase in basic hardware imports has diminished steadily from an increase of 1.7% in September to no increase in December. Crude material imports continued a strong rate of growth although at a diminishing pace with an increase of 5% in December, down from an 8.8% increase in August. Crude petroleum imports continued to climb with increases of around 8% a month in the last three months of 1979. Coal imports have declined rapidly from an August peak with decreases of 4.6%, 7.4% and 9.1% respectively in the last three months of 1979.

*For further information on area and commodity trade, order the February 1980 issue of Summary of External Trade (65-001, \$3/\$30).*

### **B.C./N.S. Farms Up In Number**

Last year saw 1,000 extra farms in British Columbia (20,600) compared with the Census of Agriculture June 1976. Nova Scotia rose 400 to 5,800.

*For further information, contact Mike Trant or Stuart Pursey (613-995-4895), Agriculture Statistics Division, Statistics Canada, Ottawa.*



### Private/Public Investment Outlook

Most recent total of expected capital expenditures during 1980 is estimated at \$64,337 million, 12.0% higher than the \$57,441 million of 1979. Current measurement shows some added strength for 1979, now 14.1% above the \$50,360 million of 1978.

Capital expenditures for all new construction are now expected to reach \$38,797 million in 1980, up 9.4% from the 1979 total of \$35,471 million which was, in turn, 11.2% higher than the \$31,912 million in 1978. Totals for the non-residential portion are estimated at \$27,267 million for 1980 (13.7%), \$23,989 million in 1979 (17.2%) and \$20,461 million in 1978. Residential construction estimates are unchanged with totals for the same three years amounting to \$11,530 million (0.4%), \$11,482 million (0.3%) and \$11,450 million. Totals for machinery and equipment show more strength than indicated earlier — \$25,540 million (16.2%), \$21,970 million in 1979 (19.1%) and \$18,448 million in 1978.

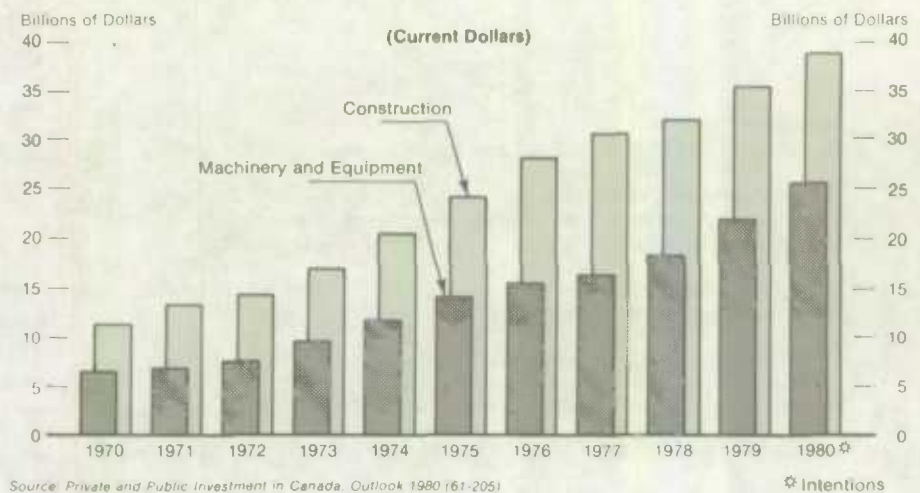
New total for capital spending by the business sector is now \$44,226 million or 16.8% above the \$37,865 million in 1979. The higher level in the two years has increased the gain in 1979 to 20.1% over the \$31,528 million in 1978. Total for social capital of institutions and governments is almost unchanged at \$8,582 million (6.0%) in 1980, \$8,094 million (9.7%) in 1979 and \$7,381 million in 1978.

Provinces with capital expenditure programs showing increases above the national average of 12% are British Columbia (17.8%), Alberta (15.6%), Saskatchewan (15.2%) and Ontario (14.3%). Other increases include Prince Edward Island (10.5%), the Yukon and Northwest Territories (9.6%), Newfoundland (9.0%), Nova Scotia (8.8%), Québec (6.1%) and Manitoba (5.0%). New Brunswick is the only province showing a decrease (9.7%) after a gain of 24.4% in 1979 over 1978.

The level of capital outlays is up by only 1.7% in 1980 in the Atlantic Region. The main strength is shown in the primary industries group at a total of \$744 million or 24.1% above 1979. The total of institutions and governments ranks second with a gain of 10.2% to \$1,049 million. These gains for the two sectors are represented in all of the provinces of the region except for the primary industries group in Newfoundland showing a small decrease of 4.2% or \$9.1 million. Decreases are in evidence regionally for utilities and manufacturing where totals of \$822 million and \$440 million, respectively, are down 10.7% and 12.5% from 1979. An increase in both of these industry groups in Newfoundland only partly offsets the decreases in both New Brunswick and Nova Scotia. Total for the trade-finance-commercial group is expected to be down 2.8% regionally in 1980 even though Nova Scotia is showing some strength at a level of \$179 million (13.9%).

Current estimates of capital expenditures for 1980, 1979 and 1978 replace advance estimates of March 4, 1980.

### Capital Expenditures, Canada, 1970-79 and Intentions 1980



Source: Private and Public Investment in Canada, Outlook 1980 (61-205)

\* Intentions

### New Motor Vehicle Sales

New motor vehicles sold in February rose 4.8% to 103,816 from 1979. Automobiles made in the United States and Canada fell 1.5% to 61,594 and Canadian and U.S. commercial vehicles 9.1% to 25,418.

Automobiles from overseas rose 90.6% to 15,150 from 1979 and overseas-made commercial vehicles 168.5% to 1,654. Value of the cars rose 100.0% to \$112.6 million and the commercial vehicles 186.8% to \$12.1 million. Value of U.S. and Canadian cars sold rose 3.7% to \$475.4 million; commercial vehicles 2.8% to \$285.8 million.

Sales value of all vehicles increased 11.2% to \$885.9 million, including 194 coaches and buses valued at \$5.0 million. Seasonally-adjusted sales of automobiles manufactured in Canada and the U.S. rose 9.4% from January to 70,089 and those of cars from overseas 9.2% to 20,024. Commercial vehicles fell 2.0% to 30,204.

For two months, sales reached 192,553 units (187,525 in 1979), value \$1,654.3 million, up 12.4% from 1979.

For further information, see the February 1980 issue of *New Motor Vehicle Sales* (63-007, \$2.50/\$25), or contact M. Kwilecki (613-996-9304), Retail Trade Section, Merchandising and Services Division, Statistics Canada, Ottawa K1A 0V4.

### Crude Petroleum/Natural Gas

Crude petroleum production, December, averaged 265 100 cubic metres/day (1,668,200 barrels/day), up 1.7% from 260 600 (1,639,700) in December 1978. Net new production of natural gas for the same period averaged 327 300 000 cubic metres/day (11,555,000,000 cubic feet/day), up 0.7% from 325 100 000 (11,477,900,000) a year earlier.

For further information, order the December 1980 issue of *Crude Petroleum and Natural Gas Production* (26-006, \$2.50/\$25), or contact G. Kitchen (613-996-3139), Manufacturing and Primary Industries Division, Statistics Canada, Ottawa K1A 0T6.

### Industrial Corporations, Financial

After tax profits of industrial corporations rose 35.1% to \$5,741 million for fourth quarter, 1979, an increase of \$1,491 million from fourth quarter, 1978. Sales of \$105 billion increased \$14 billion (15.4%).

Figures represent latest data and supersede preliminary estimates released February 1980. Data also available on CANSIM; for further information, order fourth quarter 1979 issue of *Industrial Corporations, Financial Statistics* (61-003, \$10/\$40), or contact R. Martelock (613-995-9751), Business Finance Division, Statistics Canada, Ottawa K1A 0T6.

### Radio Broadcasting

Gross January radio air-time sales rose 4.4% to \$4.7 million from \$4.5 million a year earlier. After commissions, net national sales rose 5.3% to \$4.0 million from \$3.8 million. Net local air-time sales: up 9.3% to \$17.6 million from \$16.1 million.

For further information, order the January 1980 issue of *Radio Broadcasting* (56-003, \$1.50/\$15), or contact J.R. Slattery (613-996-9271), Transportation and Communications Division, Statistics Canada, Ottawa K1A 0V1.

### Corrugated Boxes/Wrappers

Manufacturers shipped 1,609,004,000 square feet (149 481 000 m<sup>2</sup>) of corrugated boxes and wrappers in February, 4.6% above 1,537,513,000 (142 840 000) a year earlier.

For further information, order the February 1980 issue of *Shipments of Corrugated Boxes and Wrappers* (36-004, \$1.50/\$15), or contact G.W. Barrett (613-992-0950), Manufacturing and Primary Industries Division, Statistics Canada, Ottawa K1A 0T6.

### Rubber Production

January production of rubber rose to 121 404 158 kg (55,068,000 lbs) from 114 891 703 (52,114,000) a year earlier.

For further information, order the January 1980 issue of *Production, Consumption and Inventories of Rubber* (33-003, \$1.50/\$15), or contact John Dornan (613-996-3226), Manufacturing and Primary Industries Division, Statistics Canada, Ottawa K1A 0T6.



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# These publications released March 28 — April 10

	Cata- logue No.	In Canada: Price per issue/year	Elsewhere: Price per issue/year
<b>AGRICULTURE</b>			
Production and Stocks of Eggs and Poultry, January 1980	23-003	\$2.50/\$25	\$3/\$30
<b>BALANCE OF PAYMENTS</b>			
Quarterly Estimates of the Canadian Balance of International Payments, Fourth Quarter 1979	67-001	\$6/\$24	\$7.20/\$28.80
<b>BUSINESS FINANCE</b>			
Corporation Taxation Statistics, 1977	61-208	\$8	\$9.60
<b>EDUCATION, SCIENCE AND CULTURE</b>			
Culture Statistics — Cultural Facilities in Canada, 1977	87-660	\$6	\$7.20
Interprovincial and International Migration of Children in Canada, 1978-79	81-216	\$4.50	
Minority and Second Language Education, Elementary and Secondary Levels, 1978-79	81-257	\$6	\$7.20
Salaries and Qualifications of Teachers in Public Elementary and Secondary Schools, 1978-79	81-202	\$6	\$7.20
<b>SERVICE BULLETINS</b>			
Culture statistics — Vol. 3, No. 2, Recreational Equipment Ownership, 1978	87-001	\$1.50/\$15	\$1.80/\$18
Science Statistics — Vol. 4, No. 2, The Provincial Research Organizations, 1978	13-003	\$1.50/\$15	\$1.80/\$18
<b>EXTERNAL TRADE</b>			
Imports by Countries, January-December 1979	65-006	\$7.50/\$35	\$9/\$36
<b>HEALTH</b>			
Criminal Injuries Compensation, 1980	86-502	\$6	\$7.20
Workmen's/Workers' Compensation, 1980	86-501	\$6	\$7.20
<b>LABOUR</b>			
Estimates of Labour Income, October-December 1979	72-005	\$3/\$20	\$6/\$24
<b>MANUFACTURING AND PRIMARY INDUSTRIES</b>			
Abrasives Manufacturers, 1978	44-202	\$4.50	
Automobile Fabric Accessories Industry, 1978	34-222	\$4.50	
Canned and Frozen Fruits and Vegetables — Monthly, January 1980	32-011	\$1.50/\$15	\$1.80/\$18
Cordage and Twine Industry, 1978	34-203	\$4.50	
Factory Sales of Electric Storage Batteries, January 1980	43-005	\$1.50/\$15	\$1.80/\$18
Flour and Breakfast Cereal Products Industry, 1978	32-228	\$4.50	
Gas Utilities, December 1979	55-002	\$2.50/\$25	\$3/\$30
HardBoard (Wood Fibre), February 1980	36-001	\$1.50/\$15	\$1.80/\$18
Manufacturers of Mixed Fertilizers, 1978	46-220	\$4.50	
Monthly Production of Soft Drinks, February 1980	32-001	\$1.50/\$15	\$1.80/\$18
Oil Pipe Line Transport, December 1979	55-001	\$2.50/\$25	\$3/\$30
Poultry Processors, 1978	32-227	\$4.50	
Primary Iron and Steel, January 1980	41-001	\$2.50/\$25	\$3/\$30
Production and Shipments of Floor Tiles, February 1980	47-001	\$1.50/\$15	\$1.80/\$18
Production and Inventories of Process Cheese and Instant Skim Milk Powder, February 1980	32-024	\$1.50/\$15	\$1.80/\$18
Pulp and Paper Mills, 1978	36-204	\$4.50	
Refractories Manufacturers, 1978	44-214	\$4.50	
Refined Petroleum Products, December 1979	45-004	\$2.50/\$25	\$3/\$30
Shipments of Animal and Poultry Feeds — Quarterly — Vol. 1, No. 4, Quarter Ended December 31, 1979	32-004	\$2.50/\$10	\$3/\$12
Specified Chemicals, January 1980	46-002	\$1.50/\$15	\$1.80/\$18
The Sugar Situation, February 1980	32-013	\$1.50/\$15	\$1.80/\$18
Veneer and Plywood Mills, 1978	35-206	\$4.50	
<b>MERCHANDISING AND SERVICES</b>			
Department Store Sales by Regions, February 1980	63-004	\$1.50/\$15	\$1.80/\$18
New Motor Vehicle Sales, January 1980	63-007	\$2.50/\$25	\$3/\$30
Retail Chain Stores, 1978	63-210	\$7	\$8.40
<b>PRICES</b>			
Construction Price Statistics, March 1980	62-007	\$3/\$30	\$3.60/\$36
<b>TRANSPORTATION AND COMMUNICATIONS</b>			
International Air Charter Statistics, July-September 1979	51-003	\$5/\$20	\$6/\$24
Railway Operating Statistics, October 1979	52-003	\$2.50/\$25	\$3/\$30