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Weekly Bulletin

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Canada's Merchandise Trade

On a seasonally adjusted balance-of-payments basis, preliminary results indicate that Canada's exports increased 0.2% or \$14 million to \$6,962 million in September 1981, following a 1.3% decrease in August, a 4.4% decrease in July and a 6.5% increase in June. Imports also increased in September with a 4.9% or \$321 million increase to \$6,897 million following a 1.9% decrease in August, a 2.5% decrease in July and a 7.1% increase in June. The surplus on merchandise trade of \$65 million in September was down from a surplus of \$372 million in August. This brings the merchandise trade surplus at the three-quarter mark of the year to \$3.51 billion, down from \$5.02 billion for the same period in 1980.

Third quarter 1981 exports decreased 1.2% or \$260 million from the second quarter to \$20.95 billion, following a 4.6% increase in the second quarter, a 1.0% decrease in the first quarter and a 6.9% increase in the fourth quarter of 1980. Third quarter 1981 imports showed little change with a 0.1% or \$20 million decrease to \$20.2 billion following an 8.9% increase in the second quarter, a 4.9% increase in the first quarter and a 4.8% increase in the 1980 fourth quarter. As a result the third quarter 1981 merchandise trade balance continued to decelerate to \$770 million after surpluses of \$1.0 billion in the second quarter, \$1.8 billion in the first quarter, and \$2.8 billion in the fourth quarter of 1980.

Commodity Analysis

On a customs basis, for seasonally adjusted domestic exports, the largest decreases in value for September were for aircraft and other transportation equipment (down 51% or \$155 million to \$150 million following a \$95 million increase in August), passenger cars (down 26% or \$150 million to \$430 million) and non-ferrous metals (down 15% or \$85 million to \$470 million). Exports of petroleum and coal products were up 60% or \$110 million to \$285 million and forest products exports showed a partial strike-recovery with an 11% or \$95 million increase to \$905 million following a \$180 million decrease in August.

The largest increases for September exports were for aircraft and other transportation equipment (up 41% or \$100 million to \$340 million), industrial machinery (up 17.0% or \$95 million to \$660 million

(continued on next page)

LATEST MONTHLY STATISTICS

EMPLOYMENT, INCOME

			Previous Month	% Change From Year Ago
Average Weekly Earnings (\$)	July	354 97p	355.86p	11.7
Labour Income (\$ million)	July	15,491.8p	15,769.7p	13.9
Persons with Jobs (million)	Sept.	11.03	11.48	2.1
Unemployed	Sept.	891,000	790,000	16.5

INVENTORIES

Department Store (\$ million)	Aug.	2,983.1	2,984.7	15.9
Manufacturers' Owned (\$ million)	Aug.*	32,346.7p	31,622.1r	14.9
Wholesale (\$ million)	May	17,091.0	16,923.1	..

ORDERS

Manufacturers' New Orders (\$ million)	Aug.*	14,258.3p	15,485.2r	10.8
Manufacturers' Unfilled Orders (\$ million)	Aug.*	19,280.4p	19,565.1r	6.6

PRICES

Consumer Price Index (1971=100)	Sept.	242.4	240.6	12.5
Non-food Component (CPI)	Sept.	224.9	222.6	13.5
New House Price Index (1976=100)	Sept.*	134.7	135.0	12.1
22-city Composite Wage, Building (1971=100)	June	273.3p	273.3p	9.3
Industry Selling Price Index (1971=100)	Aug.	275.2p	273.8r	10.3

CONSTRUCTION

Building Permits (\$ million)	Aug.*	1,297.3p	12,141.3p	29.9
Housing Starts — Urban Centres (units)	Sept.	13,272	110,536	26.1

ENERGY

Coal Production (thousand metric tonnes)	Aug.*	2 894.7	25 831.8	9.6
Electricity Generation (terawatt hours)	Aug.*	28.7	248.2	3.5
Natural Gas Production (million cubic metres)	July	7 187.1	56 997.0	-1.4
Petroleum Refining (million cubic metres)	Aug.	8.7p	70.0p	-7.6

FOREIGN TRADE

Exports — Balance of Payments Basis (\$ million)	Aug.	5,981p	54,844p	12.3
Imports — Balance of Payments Basis (\$ million)	Aug.	5,679p	51,919p	15.7

PRODUCTION

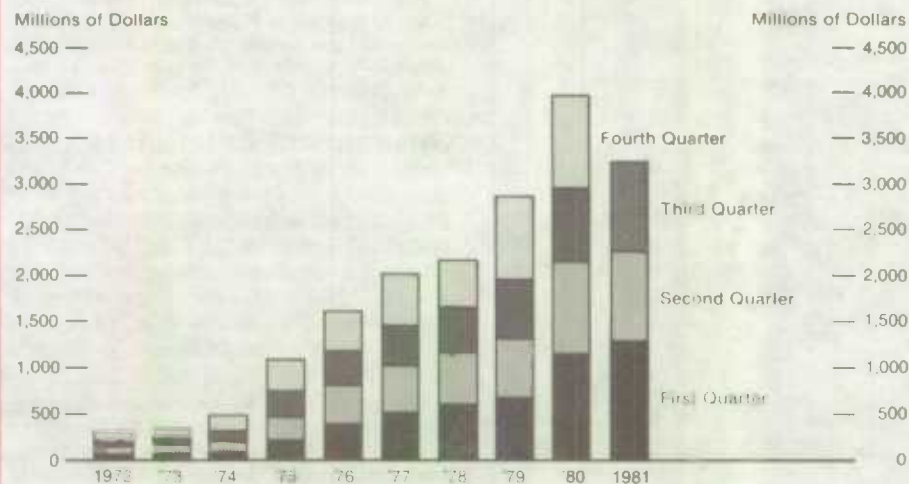
Steel (ingots — thousand metric tonnes)	Sept.	970.7	11 623.2	-1.0
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SALES

Department Store Sales (\$ million)	Aug.	786.5	5,898.9	11.6
Manufacturers' Shipments (\$ million)	Aug.*	14,543.0p	124,423.9p	16.2
New Motor Vehicle Sales (\$ million)	Aug.	851.9	8,376.4	7.6
Retail Sales (\$ million)	Aug.	7,785.2p	60,264.8p	14.4
Wholesale Sales (\$ million)	May	9,701.6p	44,570.1p	..

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

Canadian Exports of Natural Gas to the United States



Source: Statistics Canada, Summary of External Trade (65-001)

following a \$65 million decrease in August) and precious metals (up 157% or \$95 million to \$155 million following a \$30 million decrease in August). The largest decreases were for crude oil (down 26% or \$205 million to \$595 million following a \$140 million increase in August) and motor vehicle products (down 14% or \$215 million to \$1.35 billion following an \$85 million decrease in August).

Trading Partner Analysis

Exports to the United States declined 7.3% or \$360 million to \$4.54 billion in September after increasing 2.5% in August. There was an increase of 13% or \$75 million to \$640 million in exports to the United Kingdom and "Other EEC" countries. Exports to Japan decreased 6.5% to \$345 million following a 13.7% increase in August. Exports to "Other OECD" countries rose 19.5% to \$245 million following an August increase of 34%.

Imports from major sources — with the exception of imports from "Other America" — showed increases in September. Imports from the U.S. increased 8.6% or \$385 million to \$4.85 billion, after decreasing 7.2% in August. Imports from "Other EEC" countries rose 36% or \$105 million to \$400 million. Imports from Japan increased 20% to \$400 million and imports from "Other OECD" countries increased 38% to \$205 million.

For further information on area and commodity trade, order the September 1981 issue of *Summary of External Trade* (65-001, \$3/\$30).

The Dairy Review

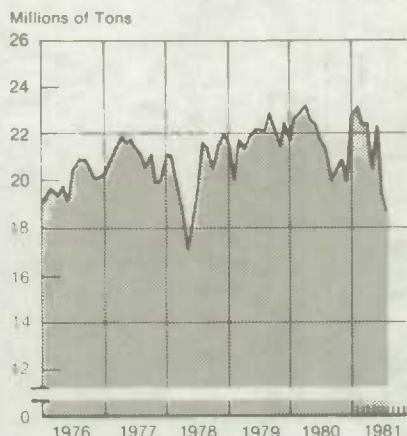
An estimated 680 182 kilolitres of milk were sold off Canadian farms for all purposes in August 1981, up 1.0% from a year earlier.

This brought the total estimate of milk sold off farms during the first eight months of 1981 to 5 066 036 kilolitres, an increase of 2.0% over the January-August 1980 period.

For further information, order the September 1981 issue of *The Dairy Review* (23-001, \$2.50/\$25).

Rail Revenue Freight Loaded

(Seasonally Adjusted)



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Department Store Sales

Department store sales for September 1981 were \$848.4 million, up 5.3% from a year earlier. Increases were recorded in all regions except Québec.

Sales by regions for the latest month were as follows, with percentage changes from September 1980 in brackets:

- Ontario, \$302.0 million (+7.6%)
- British Columbia, \$156.1 million (+9.0%)
- Québec, \$146.9 million (-3.9%)
- Alberta, \$125.2 million (+8.7%)
- Atlantic provinces, \$50.9 million (+3.8%)
- Manitoba, \$44.7 million (+5.4%)
- Saskatchewan, \$22.6 million (+0.8%).

Data users should note that figures for the Yukon and Northwest Territories are included with British Columbia. Order the September 1981 issue of *Department Store Sales by Regions* (63-004, \$1.50/\$15).

Wholesale Trade

Wholesale merchants' sales in July 1981 fell by 5.3% from the June level. Lower sales totals were posted in seven provinces, losses ranging from 0.4% for Alberta to 11.9% for Nova Scotia. The largest sales increase was in Manitoba (6.1%).

Wholesale inventories in July showed a decrease of 0.6% from the previous month.

For further information, order the July 1981 issue of *Wholesale Trade* (63-008, \$1.50/\$15), or contact the Wholesale Trade Section (613-996-9307), Merchandising and Services Division, Statistics Canada, Ottawa K1A 0V4.

Government Enterprises

Federal government enterprises (including their foreign subsidiaries) had income of \$19.945 million in the fiscal year ended nearest to December 31, 1980. Expenditure for the corresponding period amounted to \$17,121 million. On a financial management basis, this resulted in a net profit of \$1,477 million after provision for income tax.

The publication, *Federal Government Enterprise Finance, 1980* (61-203, \$4.50), will be released at a later date. For further information, contact G.M. McIlveen (613-995-9894), Public Finance Division, Statistics Canada, Ottawa K1A 0T6.

Business Conditions

Canadian manufacturers reporting to the Business Conditions Survey in October were generally pessimistic about production in the fourth quarter of 1981. Except for the export-based and non-durable consumer goods industries, the proportions of the weighted response expecting higher production were less than those anticipating lower production. The fourth quarter outlook of the export-based industries was strongly influenced by the expected improved performance reported by the automobile establishments surveyed.

The level of new orders was reported to be declining by 47% of the weighted response and rising by only 13%. In July, 28% noted declining new orders with 21% indicating that they were rising.

Response indicating a higher than normal backlog of unfilled orders decreased to 9% in October from 14% in July and those reporting a lower than normal backlog increased to 46% from 35%.

The level of finished products inventory was felt to be too high by 33% of the weighted response, too low by 4% and about right by 62%. In July, 26% reported stocks of finished goods as too high, 4% too low and 70% about right.

A shortage of skilled labour continued to be a major impediment to production with 11% noting this difficulty. As well, the proportion indicating "other difficulties" increased to 7% in October from 3% in July. In this category there was a considerable increase in the proportion of respondents expressing concern about high interest rates.

Historical data from the *Business Conditions Survey at the Canada and economic-use group level as well as provincial data at the all-industry level* are now available from matrices 2840 and 2842 of the CANSIM data bank. For further information, contact T. Newton (613-996-7008), Manufacturing and Primary Industries Division, Statistics Canada, Ottawa K1A 0T6.

Refrigerators/Home Freezers

Domestic production of refrigerators in September 1981 amounted to 57,892 units. Home freezer production was 31,158 units.

For further information, order the September 1981 issue of *Domestic Refrigerators and Freezers* (43-001, \$1.50/\$15), or contact G. Elliot (613-996-3226), Manufacturing and Primary Industries Division, Statistics Canada, Ottawa K1A 0T6.

Washers/Dryers

Canadian production of electric automatic washing machines during the month of September 1981 was 41,482 units.

Production of electric automatic clothes dryers for the latest month totalled 23,009 units.

For further information, order the September 1981 issue of *Domestic Washing Machines and Clothes Dryers* (43-002, \$1.50/\$15), or contact G. Elliot (613-996-3226), Manufacturing and Primary Industries Division, Statistics Canada, Ottawa K1A 0T6.

Manufacturing Industries

Preliminary estimates show the value of new orders received by all Canadian manufacturing industries was at a seasonally adjusted level of \$15,567.2 million in August 1981, down 7.5% from the July value of \$16,837.6 million. New orders received by durable goods producing industries dropped 15.3% to \$6,562.8 million from \$7,744.9 million in July, reflecting steep declines in primary metals, electrical products and machineries industries. New orders received by non-durable goods producing industries were down 1.0% to \$9,004.4 million from \$9,092.7 million.

Canadian manufacturers' shipments in August were \$15,905.7 million, seasonally adjusted, 3.9% lower than the July value of \$16,558.3 million. The decrease was mainly attributable to declines in the wood and primary metals industry groups, where many large establishments were shut down by strikes. Durable goods shipments were down 6.8% to \$6,935.9 million from \$7,442.9 million in July while non-durable goods shipments declined 1.6% to \$8,969.8 million from \$9,115.4 million.

The total value of unfilled orders for all manufacturing, seasonally adjusted, was estimated at \$19,274.9 million at the end of August, 1.7% lower than the July value of \$19,613.4 million.

Total inventory owned by manufacturers at the end of August was up 1.5% to \$32,461.7 million from \$31,978.3 million in July, with increases in stocks in 17 of the 20 major industrial groups. The largest relative buildups were in non-metallic minerals, clothing, machinery, leather, furniture and fixtures and wood industries.

The seasonally adjusted ratio of total inventory owned to shipments increased to 2.04:1 in August from 1.93:1 in July. The finished products to shipments ratio rose to 0.67:1 from 0.63:1.

Not adjusted for seasonal variation, manufacturers' shipments in August 1981 were estimated at \$14,543.0 million. Shipments for the first eight months of 1981 totalled \$124,423.9 million, up 16.2% from \$107,008.3 million in the January-August 1980 period.

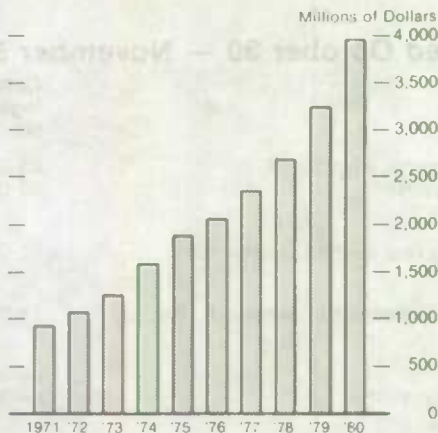
Data users should note that because of revisions of all series to new benchmarks developed from current census of manufactures data, all estimates from January 1978 to August 1981 have, for the first time with this release, been adjusted to 1978 and 1979 benchmarks. For further information, order the August 1981 issue of Inventories, Shipments and Orders in Manufacturing Industries (31-001, \$3.50/\$35), or contact H.D. Wightman (613-996-7008), Shipments, Inventories and Orders Section, Manufacturing and Primary Industries Division, Statistics Canada, Ottawa K1A 0T6.

Estimates of Employees

Monthly summary data are released on a regular basis in the *Statistics Canada Daily* while detailed monthly information is published in the publication *Estimates of Employees by Province and Industry* (72-008, \$3/\$30).

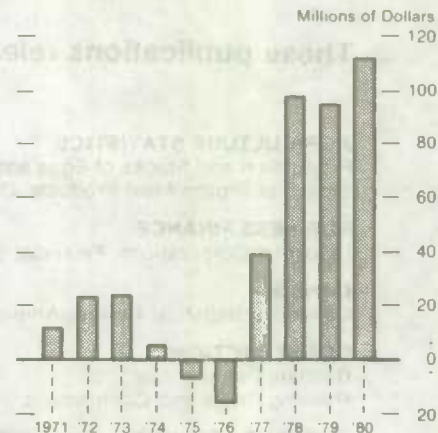
Air Carriers of All Financial Levels

Operating Revenues



Source: Statistics Canada, Air Carrier Financial Statements (51-206)

Net Income After Taxes



Canadian Air Carriers

The Canadian air transport industry recorded an after-tax net income of \$112.4 million in 1980. The two largest Canadian air carriers — Air Canada and CP Air — reported after-tax net income of \$57.0 million and \$6.8 million, respectively.

A total of \$3,985 million was earned by Canadian air carriers in 1980, up 22.4% from revenues of \$3,256 million in 1979. Total operating expenses rose 22.9% over the same period to \$3,798 million from \$3,091 million.

For further information, order Air Carrier Financial Statements, 1980 (51-206, \$6).

Railway Operating Statistics

Canada's seven major railways reported a combined net income from operations of \$47.2 million in April 1981, up 60.7% from a year earlier. Operating revenues at \$508.1 million were up 18.5% from April 1980.

Revenue freight ton-miles were up 3.1% in the latest month; freight train-miles showed an increase of 2.5%; and freight car-miles rose 4.3%. Average revenue per ton-mile of freight was 3.034 cents compared to 2.671 cents in April 1980. Passenger-miles increased 0.7% to 127.0 million.

For further information, order the April 1981 issue of Railway Operating Statistics (52-003, \$2.50/\$25), or contact W.R. Burr (613-995-1976), Transportation and Communications Division, Statistics Canada, Ottawa K1A 0V1.

Urban Transit

Canadian urban transit systems (59) collected 122,800,629 initial passenger fares in September 1981. The total distance run was 60 823 448 km and operating revenues amounted to \$57,020,203.

For further information, order the September 1981 issue of Urban Transit (53-003, \$1.50/\$15), or contact the head (613-995-1976), Surface Transport Unit, Transportation and Communications Division, Statistics Canada, Ottawa K1A 0V1.

Coal/Coke Statistics

Production of coal in Canada decreased 6.7% in August 1981 to 2 894 667 tonnes from 3 102 476 tonnes a year earlier. Landed imports were down 16.3% to 1 530 308 tonnes from 1 828 794 tonnes.

Domestic coal production in the first eight months of 1981 totalled 25 831 813 tonnes, up 9.6% from 23 568 680 tonnes in the January-August 1980 period.

For further information, order the August 1981 issue of Coal and Coke Statistics (45-002, \$2.50/\$25), or contact Dave Madsen (613-996-3139), Energy Section, Manufacturing and Primary Industries Division, Statistics Canada, Ottawa K1A 0T6.

Electric Power Statistics

Net generation of electricity in Canada increased to 28.7 TWh in August 1981 from 27.5 TWh a year earlier. Hydro generation rose 8.1% while thermal production decreased 3.4%.

Total generation during January-August 1981 was 248.2 TWh, up 3.5% from the same period in 1980.

For further information, order the August 1981 issue of Electric Power Statistics (57-001, \$2.50/\$25), or contact David Madsen (613-996-3139), Manufacturing and Primary Industries Division, Statistics Canada, Ottawa K1A 0T6.

Oil Pipeline Transport

Net receipts of crude oil, condensates, pentanes plus, liquefied petroleum gases and petroleum products through Canadian oil pipelines during August 1981 increased 0.9% to 12 366 907 cubic metres from 12 256 952 cubic metres in August 1980.

For further information, order the August 1981 issue of Oil Pipeline Transport (55-001, \$2.50/\$25), or contact I. Cavanagh (613-996-3139), Manufacturing and Primary Industries Division, Statistics Canada, Ottawa K1A 0T6.



These publications released October 30 — November 5

	Catalogue No.	In Canada Price per issue/year	Elsewhere Price per issue/year
AGRICULTURE STATISTICS			
Production and Stocks of Eggs and Poultry, August 1981	23-003	\$2 50/\$25	\$3/\$30
Stocks of Frozen Meat Products, October 1981	32-012	\$2 50/\$25	\$3/\$30
BUSINESS FINANCE			
Industrial Corporations, Financial Statistics, Second Quarter 1981	61-003	\$10/\$40	\$12/\$48
CANSIM			
Canadian Statistical Review, Annual Supplement to Section I, 1980	11-206	\$6	\$7.20
CONSTRUCTION			
Building Permits, July 1981	64-001	\$3.50/\$35	\$4.20/\$42
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Preliminary Unemployment Insurance Statistics, July 1981	73-001p	N/C	N/C
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Air Carrier Financial Statements, 1980	51-206	\$6	\$7.20
Railway Carloadings, August 1981	52-001	\$1 50/\$15	\$1.80/\$18
Water Transportation, 1978	54-205	\$7	\$8.40
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Aviation Statistics Centre, Vol. 13, No. 10, Canadian Air Transport Industry, Summary Statistics	51-004	\$1 50/\$15	\$1.80/\$18
Water Transport, Vol. 11, No. 8, International Vessel Traffic Statistics, Third Quarter 1980	54-003	\$1 50/\$15	\$1.80/\$18