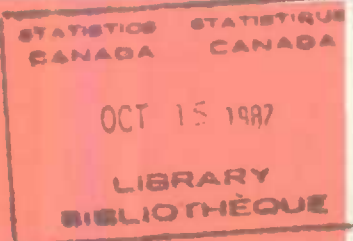


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Weekly Bulletin



October 15, 1982

Canadian Leading Indicator

The leading indicator (1971=100) declined 1.22% in July 1982, to 109.23 from 110.58 in June, providing no indication of a firming of economic activity in the third quarter. Household spending and business investment appear to be the most important factors contributing to the continued weakness of total demand. The rate of decline of the leading indicator slowed appreciably for the third consecutive month, however, moving from -1.52% to -1.22% as the non-filtered version fell only 0.4% in July to 108.0 from 108.4, and four components were up. In the non-filtered data, positive signs for an improvement in liquidity appeared in profit margins and stock prices, while signs of strengthening external demand could also help to restrain further drops in production.

The downward trend of the indicators of personal expenditure on goods was maintained into July, implying little chance of a recovery of consumer demand in the third quarter. The continued drop of employment combined with the recent slowing of wage rates appear to be prolonging the weakness of consumer demand. (Personal expenditure was down by 1.1% and 0.3% in the first and second quarters of 1982.)

The prospects for residential construction also remained depressed, as the residential construction index continued to decline at a rapid rate (-7.39%) for the third consecutive month. The weakness continued to be concentrated in multiple housing units in July, while housing starts for single-family homes fell slightly after stabilizing around the low level of 35,000 units in the first half of the year.

The recent improvement in the indicators of the manufacturing sector carried over into July, although these signs have not as yet been reflected in the coincident indicators. (Manufacturing output fell 2.4% in July after a 1.4% drop in June, while the Labour Force Survey measure of manufacturing employment recorded declines of 0.5% in July and 1.5% in August.) New orders for durable goods rose slightly (+0.24%) for the second straight month. The non-filtered version, however, recorded a drop of 2.4%, as export orders appear to have softened after a strong performance in the second quarter.

The indicators of profit margins improved
(continued on next page)

LATEST MONTHLY STATISTICS

EMPLOYMENT, INCOME

Average Weekly Earnings (\$)	June	389.57p	387.25p	9.3
Labour Income (\$ million)	July*	16,734.4p	17,022.1p	5.7
Persons with Jobs (million)	Sept.*	10.54	10.91	-4.4
Unemployed	Sept.*	1,343,000	1,388,000	50.7

INVENTORIES

Department Store (\$ million)	July	3,006.6	2,909.1	-1.1
Manufacturers' Owned (\$ million)	July	33,093.5p	33,537.3r	4.7

ORDERS

Manufacturers' New Orders (\$ million)	July	13,939.6p	16,322.4r	-10.0
Manufacturers' Unfilled Orders (\$ million)	July	17,426.1p	17,512.2r	-10.9

PRICES

Consumer Price Index (1971=100)	Aug.	266.1	264.8	10.6
New House Price Index (1976=100)	Aug.	131.6	132.2	-2.5
Raw Materials Price Index (1977=100)	Aug.	202.9p	205.2p	6.4
Excl. coal, crude oil, nat. gas	Aug.	147.8p	151.9p	-5.3
Industry Selling Price Index (1971=100)	Aug.	290.2p	290.6p	5.1

CONSTRUCTION

Building Permits (\$ million)	July	1,066.7p	7,195.5p	-33.0
Housing Starts — Urban Centres (units)	Aug.	6,672	67,642	-30.5

ENERGY

Coal Production (thousand tonnes)	July	3,150	25,694	11.7
Electricity Generation (terawatt hours)	July	26.2	220.7	—
Natural Gas Production (million cubic metres)	June	6,934.5	51,261.3	2.9
Petroleum Refining (million cubic metres)	July	8.0p	51.9p	-16.0

FOREIGN TRADE

Exports — Balance of Payments Basis (\$ million)	Aug.*	6,411p	56,145p	1.6
Imports — Balance of Payments Basis (\$ million)	Aug.*	5,283p	45,759p	-11.3

PRODUCTION

Railway Carloadings (million tonnes)	Sept.*	15.3p	153.9p	-10.7
Steel (ingots — thousand tonnes)	July	824.6	7,694.1	-22.7

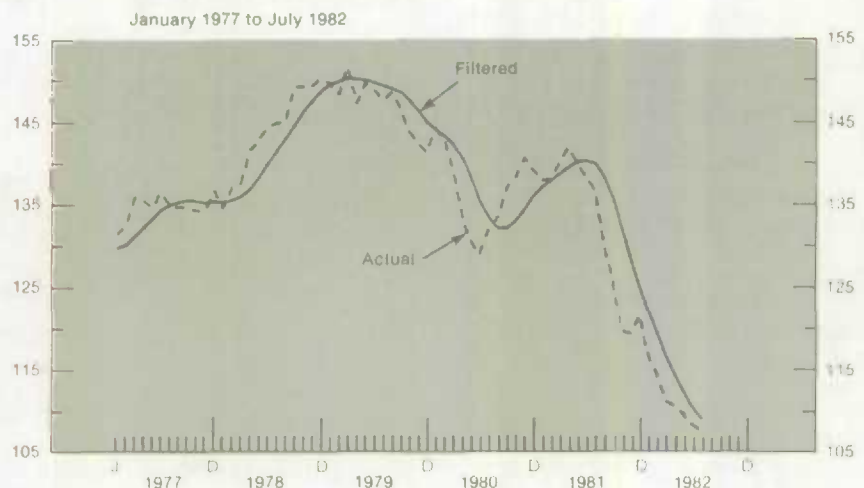
SALES

Department Store Sales (\$ million)	Aug.*	775.5	5,805.5	-1.6
Manufacturers' Shipments (\$ million)	July	14,025.7p	106,207.3p	-3.4
New Motor Vehicle Sales (\$ million)	Aug.*	752.6	6,809.5	-18.7
Retail Sales (\$ million)	July	8,388.4p	53,896.2p	2.7

Statistics are in current dollars and are not seasonally adjusted.

p - preliminary. r - revised. * - new this week.

The Canadian Composite Leading Index (1971=100)



Source: Statistics Canada, Current Economic Analysis (13-004E)

in July as the percentage change in price per unit labour cost declined less rapidly, moving from -1.04% in June to -1.02%. The percentage change in the non-filtered version rose from -0.76% to -0.75% in July, the third consecutive increase. There had been an improvement in productivity as well as an appreciable deceleration in hourly earnings in the second quarter. These tendencies have not been confirmed, however, by the data in July, when there was a sharp drop in productivity and a slight acceleration in hourly earnings.

The Toronto stock market index increased sharply in July, which led to a slowing in the rate of decline in the filtered version from -4.23% in June to -3.77% in July.

The leading indicator for the United States registered a second consecutive increase in July, rising by 0.55%. The non-filtered (published) index posted a fourth consecutive gain (+1.2%), which was widespread among the components. The positive signs in the leading indicators have been slow to have an effect on industrial production, and in August, the U.S. index recorded a large decline, even though the upward momentum of Canadian exports continued into this month.

For further information, order *Current Economic Analysis* (13-004E, Canada: \$2.50/\$25; other countries: \$3/\$30), or contact D. Rhoades (613-992-4441), *Current Economic Analysis Division, Statistics Canada, Ottawa K1A 0T6*.

Vending Machine Operators

Vending machine operators (643) reported total 1981 sales of \$380.1 million, up 2.2% over 1980.

A breakdown of sales in 1981 through a total of 122,121 vending machines follows, with percentage changes from 1980 in brackets:

- Cigarette machines (29,343 units), \$142.2 million (+1.1%)
- Coffee machines (17,004 units), \$69.6 million (-8.9%)
- Soft drink machines (22,431 units), \$63.2 million (+9.3%)
- Packaged confections, pastry, snack and confectionery combination machines (12,781 units), \$45.1 million (+20.2%)
- Milk, juice and hot and cold beverage combination machines (4,171 units), \$21.6 million (+46.5%).

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Market Research Handbook 1982 (Revised Edition)

The 1981 edition of the *Market Research Handbook* has been one of the Bureau's best sellers: the publication proved so popular with data users that it went into a second printing last November and more than 4,100 copies have been sold to date.

Now available is the new, updated *Market Research Handbook 1982*, a publication that provides the most comprehensive array of Canadian marketing information available in a single volume. The 882-page Handbook, which contains more than 300 tables and charts, can be used for analysis of markets of all sizes ranging from local or regional in scope to national.

The publication brings together a wide selection of the data most needed by market specialists for sound decision-making. In order that trends can be identified, the Handbook includes data for previous years tabulated with the most recent statistics. Where possible, projections of population, family and household growth and international comparisons are included. A new feature in this edition is a data series of particular interest to local market analysts, supported by graphics to highlight significant developments in the marketplace.

Priced at \$30 a copy in Canada and \$36 elsewhere, the *Market Research Handbook 1982* (catalogue 63-224), can be ordered from any of Statistics Canada's regional reference centres or from Publication Sales and Services, Statistics Canada, Ottawa K1A 0V7. For further information, contact Maurice Massaad (613-995-4198), Merchandising and Services Division, Statistics Canada, Ottawa K1A 9Z9.

Labour Force Survey

Canada's seasonally adjusted unemployment rate remained at the record level of 12.2% in September 1982, unchanged from August. The participation rate decreased to 64.0% from 64.2% in the preceding month and the employment/population ratio declined to 56.2% from 56.4%.

For the week ending September 18, 1982, the seasonally adjusted level of employment was 10,474,000, down 20,000 from August. Employment declines were concentrated in the 25 years of age and over groups with the level down 24,000 for males and 14,000 for females; the level increased by 16,000 for males 15 to 24. The largest drops in employment occurred in manufacturing (-21,000) and trade (-21,000), while a 36,000 increase was recorded in public administration. On a provincial basis, employment declined in Ontario (-18,000), British Columbia (-5,000) and Nova Scotia (-4,000) and increased in Quebec (+29,000) and Manitoba (+5,000).

Seasonally adjusted, unemployment was estimated at 1,458,000 in September, virtually unchanged from August. The level increased by 19,000 for males 25 years and over, while it decreased by 11,000 for males 15 to 24 and by 4,000 for females 25 years and over. By province, unemployment declined in Quebec (-26,000) and British Columbia (-8,000), while it increased in Ontario (+15,000) and Alberta (+9,000).

Seasonally adjusted unemployment rates for the provinces in September were as follows, with August rates in brackets: Newfoundland, 18.6% (17.7%); Prince Edward Island, 13.4% (14.2%); Nova Scotia, 13.4% (13.1%); New Brunswick, 14.8% (14.1%); Quebec, 15.0% (15.9%); Ontario, 11.1% (10.8%); Manitoba, 9.2% (9.3%); Saskatchewan, 6.7% (6.8%); Alberta, 9.0% (8.3%); and British Columbia, 13.4% (13.9%).

The unadjusted employment level for Canada was estimated at 10,544,000 in September 1982, down 487,000 (-4.4%)

from a year earlier. Unemployment climbed 50.7% to 1,343,000 from 891,000 over the 12-month period. The unemployment rate at 11.3% was up from 7.5% in September 1981; the participation rate declined to 63.8% from 65.0% and the employment/population ratio dropped to 56.6% from 60.1%.

For further information, order the September 1982 issue of *The Labour Force* (71-001, \$3.50/\$36).

Federal Gov't. Employment

Employees of the federal government (including members of the Canadian Armed Forces) and government enterprises numbered 604,381 as of June 1982, an overall increase of 3,795 (0.6%) from June 1981. General government employees increased by 14,732 (3.3%), while those in government enterprises decreased by 10,937 (-6.9%). The major portion of the increase in general government employees was due to increased term employment under the Student Summer and Youth Employment program and growth in the Canada Post Corporation and National Defence. The decline in government enterprise employment was due largely to employee layoffs by Canadian National Railways, de Havilland Aircraft of Canada Limited, Via Rail Canada Inc., Eldorado Nuclear Limited and Canadair Limited.

Gross payrolls (including overtime and retroactive payments) for April-June 1982 were \$3,602.0 million, an increase of \$436.6 million (13.8%) over the corresponding quarter in 1981.

The April-June 1982 issue of the publication *Federal Government Employment* (72-004, \$5/\$20) will be released at a later date. Data are presently available from the CAN-SIM data bank: quarterly data are located in matrix 2717 and monthly data by province in matrix 2718 and Canadian Armed Forces data in matrix 2720. Questions pertaining to the data should be directed to T. Moore (613-995-9894), *Public Finance Division, Statistics Canada, Ottawa K1A 0T6*.

Industrial Corporations

After-tax profits of Canadian industrial corporations plummeted by \$2,764 million (53.3%) from the year-earlier period to \$2,423 million in the second quarter of 1982. Seasonally adjusted at quarterly rates, profits were at a level of \$2,348 million, down \$517 million (18.0%) from the preceding quarter. Included in these totals are extraordinary gains of \$19 million in the latest quarter, \$360 million in the first quarter of 1982 and \$209 million in the second quarter of 1981; excluding extraordinary gains and losses, year-to-year unadjusted profits fell 51.7% and quarter-to-quarter seasonally adjusted profits decreased by 7.0%.

Unadjusted pre-tax profits of industrial corporations totalled \$4,430 million in the second quarter of 1982, down \$4,273 million (49.1%) from the same quarter in 1981. Seasonally adjusted, pre-tax profits at \$4,247 million decreased by \$828 million (16.3%) from the preceding quarter.

Sales by industrial corporations in the second quarter of 1982 totalled \$125.5 billion, down \$2.8 billion (2.2%) from the same quarter last year. On a seasonally adjusted basis, second quarter 1982 sales at \$124.5 billion were up from \$122.2 billion in the preceding quarter.

These data cover all privately owned corporations operating in Canada excluding those in agriculture, fishing, construction and the finance, insurance, and real estate industries. More detailed statistics for the 47 industry groups are available on CANSIM and will be available in the publication Industrial Corporations, Financial Statistics (61-003, \$10/\$40). For further information, contact Tom Maxwell or Gail Campbell (613-995-9751), Business Finance Division, Statistics Canada, Ottawa K1A 0T6.

Employment/Earnings

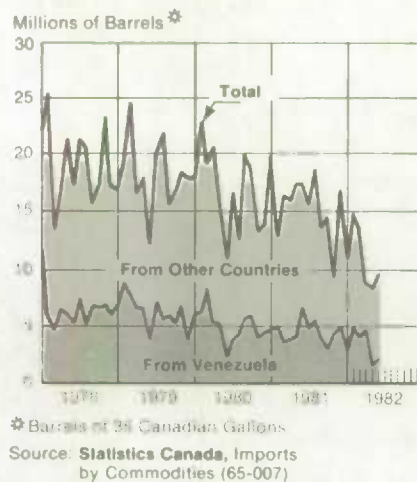
First estimates show the Canada industrial composite index of employment (1961=100) declined 0.5% from June to July 1982. Lower employment levels were recorded in all industry divisions except manufacturing which showed an increase; all regions contributed to the overall employment decrease.

Average weekly earnings at the Canada industrial level advanced 0.9% to \$391.87 in July from \$388.26 in June. Increases were recorded in all industry divisions except finance, insurance and real estate which decreased. All regions contributed to the overall increase.

Average weekly hours in July decreased in mining (including milling), remained unchanged in manufacturing and increased in construction. Average hourly earnings were higher in mining (including milling), manufacturing and construction.

Detailed information for May and June will be published in the July 1982 issue of Employment, Earnings and Hours (72-002, \$4/\$40), and is also available from R. Ouellette (613-992-5613), Labour Division, Statistics Canada, Ottawa K1A 0T6.

Canadian Imports of Crude Petroleum



New Motor Vehicle Sales

New motor vehicle sales in August 1982 totalled 72,186 units, down 14.6% from a year earlier. This included 37,712 passenger cars (down 17.4%) and 11,726 commercial vehicles (down 30.3%) manufactured in North America and 19,506 passenger cars (down 0.4%) and 3,242 commercial vehicles (up 30.6%) manufactured overseas.

The share of the domestic passenger car market taken by Japanese manufacturers in August 1982 increased to 27.6% from 24.8% in August 1981. North American manufacturers held 65.9% of the market and European manufacturers 6.5%.

Total sales value decreased 11.7% from a year earlier to \$752.6 million in August 1982. North American cars sold for \$373.7 million (down 13.9% from last year) and commercial vehicles for \$165.5 million (down 26.8%). Sales of passenger cars from overseas increased 8.4% to \$184.8 million and those of commercial vehicles were up 32.8% to \$28.6 million. Included in total commercial vehicles sold were 519 coaches and buses (down 11.9%) valued at \$17.0 million (up 22.0%).

For the first eight months of 1982, total sales of new motor vehicles were 636,465 units (849,008 in 1981), with an accumulated value of \$6,809.5 million. This represents a drop of 18.7% in value from sales for January to August 1981.

For further information, order the August 1982 issue of New Motor Vehicle Sales (63-007, \$2.50/\$25), or contact Jean-Pierre Simard (613-996-9304), Retail Trade Section, Merchandising and Services Division, Statistics Canada, Ottawa K1A 0V4.

Farm Product Prices

The Canada index number of farm prices of agricultural products (1971=100) fell 1.7% to 289.9 in August 1982 from 294.7 in July but was still up 1.4% from the August 1981 level of 285.9.

Farm Cash Receipts

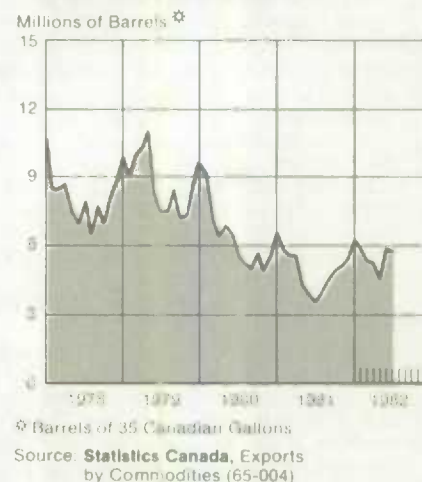
Farm cash receipts for January-August 1982 totalled an estimated \$11,806.0 million, down 5% from \$12,402.8 million in the year-earlier period.

Receipts from the sale of field crops declined 12% in 1982 to \$5,362.0 million primarily due to lower Canadian Wheat Board payments (\$568 million paid in 1982 compared with \$1,243 million in 1981) and lower initial prices for wheat; deferred grain receipts liquidated in 1982 partially offset the decline in wheat board payments. Despite the decrease in the level of wheat board payments and lower initial prices, grain volumes continue to increase and are now 23% higher than in 1981 for barley and 5% higher for wheat.

Cash receipts from the sale of livestock and livestock products increased 4% from the January-August 1981 level. Higher hog and dairy prices (and consequently receipts) offset lower cattle and poultry receipts.

For further information, order the January-August 1982 issue of Farm Cash Receipts (21-001, \$1.50/\$15), or contact Peter Lys (613-995-4895), Agriculture Statistics Division, Statistics Canada, Ottawa K1A 0T6.

Canadian Exports of Crude Petroleum to the United States



Labour Income

Labour income for the month of July 1982 was estimated at \$16,734.4 million, an increase of \$902.0 million or 5.7% from July 1981.

Adjusted for seasonal variation, wages and salaries increased by \$70.1 million between June and July 1982 to \$15,381.1 million.

The estimates will be published in the July-September 1982 issue of Estimates of Labour Income (72-005, \$5/\$20).

The index, which measures (as closely as can be determined) prices received by producers at the farm gate, is available on CANSIM (matrix 176) or in the publication Index Numbers of Farm Prices of Agricultural Products (62-003, \$1.50/\$15).



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Building Permits, July 1982

CURRENT ECONOMIC ANALYSIS

Current Economic Analysis, August 1982

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Science Statistics, Vol. 6, No. 11, The Provincial Research Organizations, 1981

GROSS NATIONAL PRODUCT

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