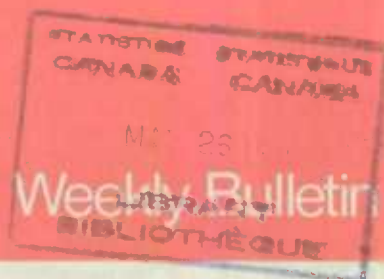


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May 21, 1982

Manufacturing Activity

Preliminary estimates show the value of new orders received in all Canadian manufacturing industries declined 1.1% in March 1982 to a seasonally adjusted \$14,917.2 million from the revised February level of \$15,077.1 million (although 2.9% higher than January's \$14,503.2 million). In durable goods industries, new orders dropped 5.0% to \$5,990.8 million from \$6,305.9 million, reflecting large decreases in primary metal, metal fabricating, transportation equipment and electrical products industries; there was, however, a 34.8% increase recorded in machinery industries. New orders in non-durable goods industries totalled \$8,926.4 million, up 1.8% from \$8,771.2 million in February.

The seasonally adjusted preliminary estimate of the value of Canadian manufacturers' shipments in March was \$15,379.5 million, up 0.1% from February's revised \$15,364.8 million. Among the 20 major groups of industries, shipments were higher in 11 and lower in nine. Shipments of durable goods industries declined 0.3% to \$6,463.5 million from \$6,484.5 million in February; decreases of \$60.3 million in primary metal industries and \$27.6 million in machinery industries were partly offset by increases of \$26.3 million in wood industries and \$45.8 million in transportation equipment industries. Shipments of non-durable goods industries were up 0.4% to \$8,916.0 million from \$8,880.3 million, with the most notable changes an increase of \$71.2 million in petroleum and coal products industries and a decrease of \$59.0 million in paper and allied industries.

The preliminary estimate of the backlog of unfilled orders in March at \$17,691.6 million, seasonally adjusted, was down 2.5% from the revised value of \$18,153.9 million a month earlier. Unfilled orders in durable goods industries fell 3.0% to \$15,431.3 million from \$15,904.0 million, while those in non-durable goods industries increased 0.5% to \$2,260.3 million from \$2,249.9 million a month earlier.

At the end of March, the total value of inventory owned by manufacturers was \$33,952.8 million, seasonally adjusted, 0.4% higher than the \$33,820.6 million revised estimate for February. Total inventory held increased 0.6% to \$35,631.3 million,

(continued on next page)

LATEST MONTHLY STATISTICS

EMPLOYMENT, INCOME

			Previous Month	% Change From Year Ago
Average Weekly Earnings (\$)	Feb.*	379.21p	376.96p	10.9
Labour Income (\$ million)	Feb.	15,685.2p	15,630.9p	11.0
Persons with Jobs (million)	Apr.	10.43	10.46	-2.5
Unemployed	Apr.	1,233,000	1,228,000	39.2

INVENTORIES

Department Store (\$ million)	Feb.	2,618.1	2,685.0	3.5
Manufacturers' Owned (\$ million)	Feb.	34,270.0p	33,696.2r	14.1

ORDERS

Manufacturers' New Orders (\$ million)	Feb.	14,448.9p	13,870.1r	-2.5
Manufacturers' Unfilled Orders (\$ million)	Feb.	18,277.4p	18,462.9r	-5.4

PRICES

Consumer Price Index (1971=100)	Mar.	255.9	252.7	11.6
Non-food Component (CPI)	Mar.	239.3	236.0	13.0
New House Price Index (1976=100)	Mar.	135.2	135.4	4.0
Raw Materials Price Index (1977=100)	Mar.	196.5p	196.3p	11.8
Industry Selling Price Index (1971=100)	Mar.	284.0p	283.1p	7.0

CONSTRUCTION

Building Permits (\$ million)	Feb.	821.8p	1,582.6p	-9.3
Housing Starts — Urban Centres (units)	Mar.	7,461	26,389	17.1

ENERGY

Coal Production (thousand tonnes)	Feb.	3,305.8	6,900.6	2.8
Electricity Generation (terawatt hours)	Feb.	34.0	73.8	6.4
Natural Gas Production (million cubic metres)	Dec.	9,876.6	97,833.1	-0.9
Petroleum Refining (million cubic metres)	Feb.	7.0p	15.3p	-15.5

FOREIGN TRADE

Exports — Balance of Payments Basis (\$ million)	Mar.	7,549p	20,295p	1.3
Imports — Balance of Payments Basis (\$ million)	Mar.	6,522p	17,052p	-7.4

PRODUCTION

Railway Carloadings (million tonnes)	Apr.*	18.1	68.5	-9.2
Steel (ingots — thousand tonnes)	Mar.	1,246.3	3,654.3	-12.5

SALES

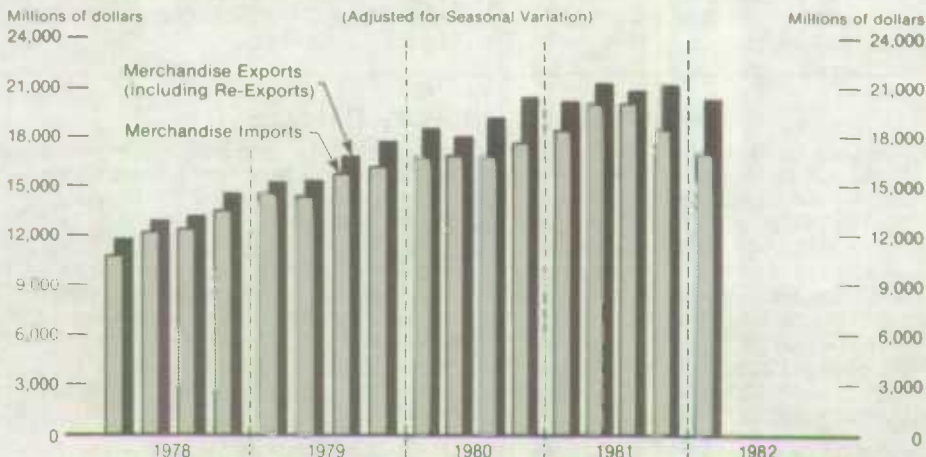
Department Store Sales (\$ million)	Mar.	694.4	1,872.4	-1.5
Manufacturers' Shipments (\$ million)	Feb.	14,634.5p	28,308.5p	1.1
New Motor Vehicle Sales (\$ million)	Mar.	941.9	2,272.5	-20.1
Retail Sales (\$ million)	Feb.	6,550.7p	13,192.2p	1.9

Statistics are in current dollars and are not seasonally adjusted.

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

Canadian Merchandise Exports and Imports*

Quarter-by-Quarter Movements



* Balance of Payments Basis

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

seasonally adjusted, from \$35,417.9 million with increases in the value of goods in process of 1.3%, in finished products of 1.1% and a decrease of 0.2% in raw materials.

The seasonally adjusted ratio of total inventory owned to shipments at the end of March was 2.21:1, up from 2.20:1 in February. The ratio of finished products to shipments rose to 0.75:1 from 0.74:1 a month earlier.

Not adjusted for seasonal variation, manufacturers' shipments in March 1982 were estimated at \$16,674.3 million, up 1.5% from \$16,425.2 million a year earlier. Cumulative shipments for the first three months of 1982 at \$44,909.7 million were up just 1.1% from the corresponding 1981 estimate of \$44,440.0 million.

For further information, order the March 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 0V6.

Telephone Statistics

Canada's 13 major telephone systems reported revenues of \$641.5 million in March 1982, up 17.0% from a year earlier. Operating expenses increased 23.0% to \$478.1 million. Net operating revenue at \$163.5 million showed an increase of 2.3% over March 1981. Telephone toll messages increased 7.9% to 126.7 million.

For further information, order the March 1982 issue of *Telephone Statistics* (56-002, \$1.50/\$15), or contact J.R. Slattery (613-3996-9271), Transportation and Communications Division, Statistics Canada, Ottawa K1A 0V1.

Railway Carloadings

Revenue freight loaded by railways in Canada in March 1982 totalled 21.1 million short tons (19.1 million t), a decrease of 3.8% from the year-earlier level. The carriers received an additional 1.4 million short tons (1.3 million t) from the United States, down 17.5% from March 1981.

Education in Canada, 1980-81 (Catalogue 81-229, \$8)

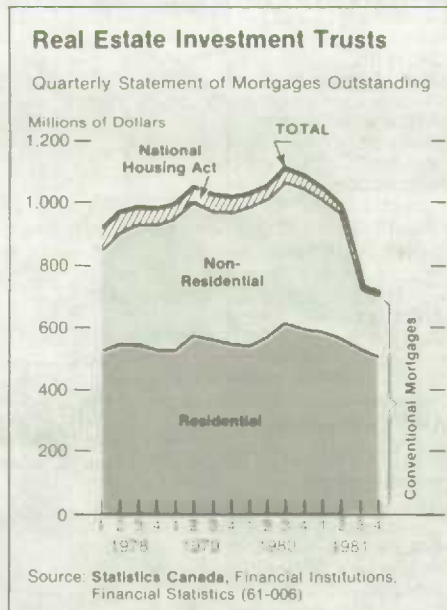
Total elementary-secondary enrolment in Canada is continuing to decline, but the rate of decline is slowing, and by the mid-1980s a slight upswing in enrolment is expected.

A Statistics Canada publication released today indicates that elementary enrolment has been dropping steadily since 1968-69, and secondary enrolment began to decline in 1976-77. However, *Education in Canada* also notes a slight increase in enrolment in the lower grades, reflecting the upturn in births since 1975.

At first glance, the post-secondary level seems untouched by the downtrend with enrolment at universities and community colleges rising 35% from 1970-71 to 1980-81. But a comparison of this growth with the 192% increase registered between 1960-61 and 1970-71 underlines the current funding and staffing difficulties being experienced by these institutions.

Education expenditures in 1980-81 accounted for an estimated 7.8% of the Gross National Product (GNP), a rise of 0.1 percentage point from 1979-80, but a 0.3 percentage point decline since 1978-79.

For further information, contact Zoltan Zsigmond (613-995-9685), Education, Science and Culture Division, Statistics Canada, Ottawa K1A 0T6.



Farm Product Prices

The Canada index number of farm prices of agricultural products (1971=100) at 284.5 in March 1982 showed an increase of 0.9% from the February number of 281.9 but was down 5.2% from the March 1981 level of 299.4.

Final Canadian Wheat Board payments for the 1980-81 crop year are now reflected in the index; these payments affect wheat, oats and barley prices in Western Canada for the period August 1980 to July 1981. As well, revisions have been made to 1981 dairy prices in Nova Scotia, Manitoba and Saskatchewan.

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). Sub-indexes for livestock, crops and their components and further information are available from Ed Hamilton (613-995-4895), Farm Income and Prices Section, Agriculture Statistics Division, Statistics Canada, Ottawa K1A 0T6.

For further information, order the March 1982 issue of *Railway Carloadings* (52-001, \$1.50/\$15). For seasonally adjusted revenue freight loadings, contact J. Bustros (613-995-1976), Transportation and Communications Division, Statistics Canada, Ottawa K1A 0V1.

1981 Census Dictionary Release

The **1981 Census Dictionary** is one of several general reference products available to users of 1981 Census data. Its purpose is to provide data users with the definitions of various concepts related to the universes, variables and geographic dimensions of the 1981 Census data base and the available data outputs.

The dictionary is organized alphabetically within major categories related to the universes covered (i.e. population, families, households, dwellings and geography), and includes appendices containing additional detailed information on certain concepts, as well as an index that cross-references commonly used census terms. The dictionary also includes details concerning the availability of similar data from previous censuses, the population for which a particular variable is applicable, the response categories for each variable, and remarks indicating historical comparability.

For further information and to order the **1981 Census Dictionary** (catalogue 99-901, \$12), contact the nearest Statistics Canada regional reference centre.

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Current Economic Analysis

Indications from last month that the rate of decline in economic activity accelerated in the first quarter of 1982 were reinforced by the data released in April. Last month the major sources of renewed weakness were consumer demand for goods, and business investment, and the April data releases reinforce this observation. While exports and investment in residential construction also appear to have declined in the first quarter, the drops should be smaller than in the fourth quarter of 1981. The decline in output does not appear to have drawn down the volume of inventories held at the manufacturing level, although preliminary indications are that inventories held at the retail and wholesale levels declined in the first quarter.

Although retail sales in constant dollars grew 1.2% in February, the level remains considerably below the fourth quarter average due to large declines in December and January. It will take an exceedingly large increase in March to make up for these earlier declines, but this is unlikely to occur as in March employment fell again, the prime rate rose half a percentage point, and consumer prices accelerated to a 1.3% gain.

Indicators of business investment such as output, real shipments, and new orders for machinery and electrical products all declined in February. Reinforcing these observations, the March data on imports disclosed an acceleration in the downward trend of imports of machinery and transportation equipment other than motor vehicles. These results are consistent with the latest survey of private and public investment which indicates that investment plans have been scaled back for 1982.

Although housing starts advanced considerably in the first quarter it is likely that residential construction will record another decline. Most of the increase in starts occurred in multiple units and was due to the impact of the MURB program. The relatively long delays in completing construction of multiple units, and the anticipated cancellation of many of the MURB starts, indicate that much of the strength seen in the multiples data will not translate into work-put-in-place in the first quarter.

The decline in exports has been slowing gradually since October 1981, and by March the drop in the short-term trend was only 0.5% and a number of positive signs were evident. Most notably, the short-term trend turned up for exports of motor vehicles, lumber, and a number of other commodities. Much of the improvement appears to be related to a firming of the U.S. economy. Inventory liquidation began earlier and is more advanced in the United States, especially at the manufacturing level where inventories began to fall last November. Combined with modest increases in motor vehicle sales and residential construction this has increased demand for some Canadian commodities.

In Canada real inventories at the manu-

Real Estate Investment Trusts

Quarterly Statement of Estimated Assets, Liabilities and Shareholders' Equity



Source: Statistics Canada, Financial Institutions, Financial Statistics (61-006)

facturing level rose \$48 million in February following a revised increase of \$35 million in January. Although some of these accumulations may be related to industries that have increased their exports to the United States, much of the increased stocks was involuntary as indicated by further cutbacks in employment. Economy-wide employment fell 0.1% in March and a further 0.7% in April, and although output figures are not yet finalized for the first quarter, they are certain to be down, and the drop will likely be larger than in the fourth quarter of 1981.

Reduced demand continued to exert downward pressure on prices in March, but again most of the easing was seen in industry selling prices which rose only 0.3%, while consumer prices climbed by 1.3%. The relatively larger burden of manufacturers inventories has probably magnified the price reaction in that sector. In the consumer sector institutional effects such as the national energy pricing agreement have kept prices relatively high, especially in the last two months.

- **Constant dollar retail sales** increased 1.2% in February following a decline of 2.9% in January. The average over the first two months of 1982 is 3.1% below the average in the fourth quarter of 1981.
- Within **manufacturing** the volume of **shipments** rose 1.3% in February, while **new orders** climbed 2.5% and **inventories** rose by \$48 million.
- **Exports** fell 1.1% in March following a 10.7% increase in February. The short-term trend for exports slowed to a 0.5% decline from the largest recent drop of 1.0% recorded last October. With the inclusion of March data the short-term trend for **imports** fell 2.5% following three months of declines of 3.0%. For the first quarter of 1982 the **nominal trade surplus** was \$3.414 billion, an increase of \$656 million from the fourth quarter level.
- **Real Domestic Product** rose 0.1% in February following a downward revised decline of 1.3% in January. The

Restaurant Statistics

Preliminary estimates for March 1982 show that restaurants, caterers and taverns in Canada had total sales of \$716.9 million. Final estimates for February 1982 indicate sales of \$659.7 million.

For further information on sales of chains versus independents and provincial sales by kind of business, order the March 1982 issue of *Restaurant, Caterer and Tavern Statistics* (63-011, \$1.50/\$15), or contact R. Bennett (613-996-9301), Services Section, Merchandising and Services Division.

Employment in Industry

First estimates show the Canada industrial composite index of employment (1961=100) at 152.9 in February 1982 remained virtually unchanged from January. Decreases in employment in forestry, manufacturing and transportation, communication and other utilities were offset by increases in the other industry divisions. Employment rose in the Atlantic region, remained unchanged in Ontario and the Prairie region and decreased in Quebec and British Columbia.

Average weekly earnings at the national industrial level advanced by 0.4% to \$379.32 in February from \$377.72 in January. Gains were recorded in all industry divisions except construction. All regions except British Columbia contributed to the overall increase.

An increase was registered in February in average weekly hours worked in construction but the level remained unchanged in manufacturing and decreased in mining (including milling). Average hourly earnings were higher in manufacturing but decreased in mining (including milling) and construction.

Detailed information for December and January will be published in the February 1982 issue of *Employment, Earnings and Hours* (72-002, \$4/\$40).

weakness in output became more widespread as the percentage of industries exhibiting declining trends in output rose to 64% in February from 62% in January.

- **Employment** fell 0.1% in March and dropped a further 0.7% in April, leaving the **unemployment rate** at 9.6%.
- Following strong MURB-related gains in the first quarter, **housing starts** dropped to an annual rate of 142,000 units in April.
- The **Industry Selling Price Index** rose 0.3% in March, while **consumer prices** gained 1.3% following a 1.2% increment in February.

For detailed analysis as well as a news summary of major domestic and international developments and extensive analytical charts and tables, order *Current Economic Analysis* (13-004E, Canada: \$2.50/\$25; other countries: \$3/\$30). For further information, contact D. Rhoades (613-992-4441), Current Economic Analysis Staff, Statistics Canada, Ottawa K1A 0T6.



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