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Weekly Bulletin

June 18, 1982

Canadian Leading Indicator

The composite index in March 1982 gave fewer signs of a recovery in economic activity in the near-term than in February. The rate of decline in the leading indicator changed only slightly from 2.36% in February to 2.34% in March, reflecting the downturn in all of the components of the non-filtered index. The filtered index fell from 118.90 in February to 116.12 in March, while the non-filtered index dropped from 113.8 to 110.7, which represents a decline of 22.1% from the peak in April 1981. The 2.7% decline in the non-filtered index in March was particularly the result of continued weakness in all of the indicators of domestic demand. Exports appear to be the only likely source of higher demand in the second quarter. The indicators of production confirmed the accentuation of the weakness of current activity in Canada in the first quarter.

Retail trade indicators in March correspond with the substantial retreat of personal expenditure on goods in the first quarter, as sales of furniture and appliances and of new motor vehicles posted declines of 2.04% and 4.15%, respectively. The continuation of high interest rates and slumping total real income due to employment cut-backs in April and May limits the likelihood of a reversal of this component of expenditure in the second quarter. The non-filtered version recorded a drop of 1.1% for furniture and appliance sales and of 8.6% for new motor vehicles in March. Sales of furniture and appliances are now 30.3% below their peak of June 1981 while automobile purchases are at a post-1972 low of 374,100 units.

The residential construction index fell by 1.27% in March, following the revision of the gain in February into a small decline. The decline in March was especially due to the large reduction in building permits for multiple units.

The leading index for the United States declined by only 0.99% in March, a much smaller rate of descent than for the Canadian index. Exports remain essentially the only likely source of higher demand in the second quarter (with the possible exception of government expenditure).

The financial market indicators in Canada continued to drop at as rapid rates in March as in February. The index of stock

(continued on next page)

LATEST MONTHLY STATISTICS

EMPLOYMENT, INCOME

			Previous Month	% Change From Year Ago
Average Weekly Earnings (\$)	Mar.*	381.87p	381.00p	10.9
Labour Income (\$ million)	Feb.	15,685.2p	15,630.9p	11.0
Persons with Jobs (million)	May	10.70	10.43	-2.9
Unemployed	May	1,241,000	1,233,000	45.3

INVENTORIES

Department Store (\$ million)	Apr.*	3,304.0	2,784.0	6.3
Manufacturers' Owned (\$ million)	Mar.	34,449.5p	34,189.9r	12.4

ORDERS

Manufacturers' New Orders (\$ million)	Mar.	16,436.9p	14,382.9r	-1.3
Manufacturers' Unfilled Orders (\$ million)	Mar.	18,047.1p	18,284.5r	-7.6

PRICES

Consumer Price Index (1971=100)	Apr.	257.3	255.9	11.3
Non-food Component (CPI)	Apr.	240.6	239.3	12.9
New House Price Index (1976=100)	Apr.	134.9	135.2	2.0
Raw Materials Price Index (1977=100)	Apr.	198.5p	196.8p	12.6
Industry Selling Price Index (1971=100)	Apr.	286.5p	284.5p	6.9

CONSTRUCTION

Building Permits (\$ million)	Mar.	1,232.8p	2,821.7p	-13.1
Housing Starts — Urban Centres (units)	Apr.	9,061	35,327	-5.5

ENERGY

Coal Production (thousand tonnes)	Mar.	4 061.8	10 991.1	5.6
Electricity Generation (terawatt hours)	Mar.	34.8	108.8	4.4
Natural Gas Production (million cubic metres)	Feb.	9 100.5	19 674.2	6.0
Petroleum Refining (million cubic metres)	Mar.	7.2p	22.5p	-16.9

FOREIGN TRADE

Exports — Balance of Payments Basis (\$ million)	Apr.	7,121p	27,506p	1.4
Imports — Balance of Payments Basis (\$ million)	Apr.	6,017p	23,011p	-9.5

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

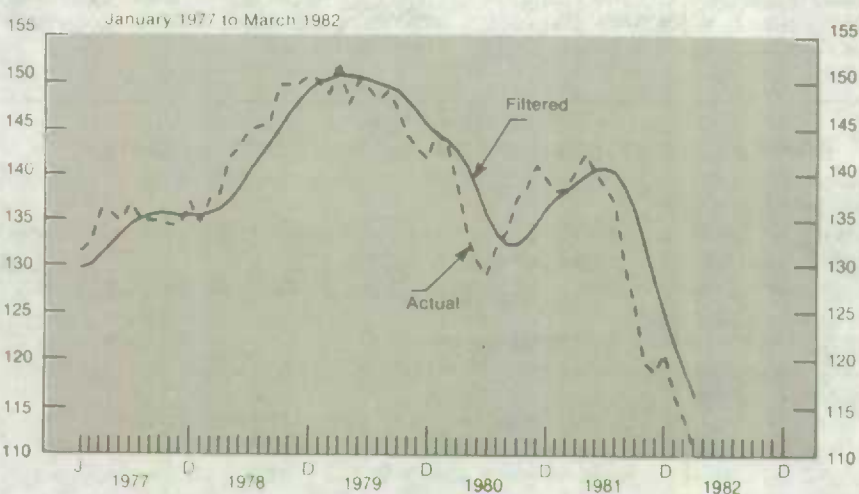
SALES

Department Store Sales (\$ million)	Apr.	799.5	2,672.0	-0.9
Manufacturers' Shipments (\$ million)	Mar.	16,674.3p	44,909.7p	1.1
New Motor Vehicle Sales (\$ million)	Apr.	999.5	3,272.0	-21.3
Retail Sales (\$ million)	Apr.*	8,048.7p	28,629.7p	2.8

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)

prices declined by 2.06%, a rate of descent comparable to those registered at the start of the recession.

The upturn which marked the indicators of the manufacturing sector in February was not extended into March. A retrenchment is evident in most of the non-filtered components related to this sector, such as new orders for durable goods (-3.2%), the ratio of shipments to inventories of finished products (-0.02), and the average work-week (-0.8%). The corresponding changes in the filtered version were -2.25%, -0.03, and -0.16%. Moreover, the percentage change in price per unit labour cost declined again at a rapid rate (-0.71), even though there was a significant slowing in average hourly earnings in the non-filtered version to an annual rate of only 8% in February and March.

For further information, order *Current Economic Analysis* (13-004E, Canada: \$2.50/\$25; other countries: \$3/\$30).

Farm Cash Receipts

Farm cash receipts for the period January to April 1982 are estimated at \$6,008.5 million, down 11% from the January-April 1981 estimate of \$6,739.8 million.

Receipts from the sale of field crops continue to decline and are now at \$3,013.1 million, 20% lower than in the corresponding period in 1981. This decline is primarily due to lower Canadian Wheat Board payments (\$568 million in 1982 compared with \$1,243 million in 1981), and lower initial prices for wheat. Partially offsetting the decline in Wheat Board payments was the large level of deferred grain receipts which were liquidated in 1982.

Increases in hog, poultry and dairy farm cash receipts almost wholly offset a decline in livestock cash receipts. Cash receipts from the sale of livestock and livestock products were down 1% from January-April 1981 levels as lower prices and marketings for cattle, and lower egg prices contributed to the decrease.

For further information, order the January-April 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.

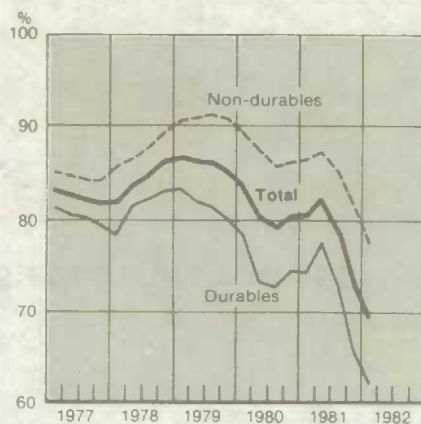
Family Characteristics and Labour Force Activity

A new set of tabulations from the monthly Labour Force Survey reveals, for example, that on average in 1981:

- Among the 5.5 million husband-wife families, in 1.7 million cases (31%) both the husband and the wife were employed full time.
- Among females with children under three years of age, nearly one-half (45%) were in the labour force.
- Among married women, the unemployment rate of those with children under three years of age was 11%, while among those with no children under 16 the unemployment rate was 6%.

These and other findings are the subject of an article in the May issue of *The Labour Force* (71-001, \$3.50/\$35). For further information, contact Jean-Marc Lévesque (613-995-9381), Labour Force Activity Section, Statistics Canada, Ottawa K1A 0T6.

Capacity Utilization Rates in Canadian Manufacturing



Source: Statistics Canada, Capacity Utilization Rates in Canadian Manufacturing (31-003)

Department Store Sales

Department stores in Canada had sales totalling \$791.7 million in April 1982, a decrease of 0.2% from April 1981. Sales were up in 21 of the 40 departments with the largest gains posted for repairs and services (+31.6%) and toiletries, cosmetics and drugs (+10.6%). The largest sales decreases were for major appliances (-19.8%) and lamps, pictures, mirrors and all other home furnishings (-15.9%).

Department store sales in April showed increases from the year-earlier period in five provinces, ranging from 6.5% for Manitoba to 0.1% for Quebec. Sales and percentage changes for metropolitan areas were: Montreal, \$89.5 million, -0.1%; Toronto, \$109.8 million, -2.9%; Winnipeg, \$39.3 million, +6.9%; and Vancouver, \$79.2 million, -8.1%.

The selling value of stocks held in April 1982 at \$3,324.8 million showed an increase of 7.0% over April 1981.

For further information, order the April 1982 issue of *Department Store Sales and Stocks* (63-002, \$2.50/\$25), or contact the Retail Trade Section (613-996-9304), Merchandising and Services Division, Statistics Canada, Ottawa K1A 0V4.

Capacity Utilization Rates

Capacity utilization in Canadian manufacturing industries fell by 5.4% to 69.7% in the first quarter of 1982 from 73.7% in the fourth quarter of 1981. Durable manufacturing industries showed a decrease of 5.8% to 62.0% of capacity in the 1982 first quarter from 65.8% in the preceding quarter. Non-durable manufacturing industries operated at 77.7% of capacity in the 1982 first quarter, down 4.9% from 81.7% in the fourth quarter of 1981. The first quarter 1982 rates are the lowest ever recorded for these three aggregate series.

Capacity utilization rates for the first quarter of 1982 by industry were as follows, with fourth quarter 1981 rates in brackets:

- Food and beverages industries, 80.3% (82.5%)
- Tobacco products industries, 86.3% (89.0%)
- Rubber and plastics products industries, 64.0% (68.9%)
- Leather industries, 72.0% (82.4%)
- Textile industries, 76.8% (85.4%)
- Knitting mills, 84.0% (83.8%)
- Clothing industries, 71.1% (75.3%)
- Wood industries, 48.7% (56.2%)
- Furniture and fixtures industries, 58.6% (67.6%)
- Paper and allied industries, 82.1% (87.2%)
- Printing, publishing and allied industries, 89.4% (95.5%)
- Primary metals industries, 64.9% (64.4%)
- Metal fabricating industries, 70.9% (74.2%)
- Machinery industries, 79.6% (80.7%)
- Transportation equipment industries, 50.7% (54.4%)
- Electrical products industries, 66.9% (73.0%)
- Non-metallic mineral products industries, 57.6% (65.6%)
- Petroleum and coal products industries, 61.0% (67.2%)
- Chemical and chemical products industries, 64.7% (67.7%)
- Miscellaneous manufacturing industries, 86.2% (86.8%)

For further information, order the first quarter 1982 issue of *Capacity Utilization Rates in Canadian Manufacturing* (31-003, \$5/\$20), or contact P. Koumanakos (613-995-4219), Construction Division, Statistics Canada, Ottawa K1A 0T6.

Farm Production, 1981

Agricultural production in Canada in 1981 rose 9.7% from the 1980 level. Crop production increased 18.9% while livestock production rose by 2.2%. A record Prairie grain crop was largely responsible for the higher agricultural output. Grain production in 1981 was 31% above the average production level for the preceding five years.

For further information, order the 1980 issue of *Index of Farm Production* (21-205, \$4.50), or contact Ed Hamilton (613-995-4895), Agriculture Statistics Division, Statistics Canada, Ottawa K1A 0T6.

Retail Trade

Total retail sales without seasonal adjustment for April 1982 were \$8,048.7 million, an increase of 3.2% from April 1981. Sales were higher in 22 of the 28 trade groups with the largest gains posted for "all other food stores" (+18.2%) and pharmacies, patent medicine and cosmetics stores (+17.8%). The largest sales decreases were for motor vehicle dealers (-16.4%), household furniture stores (-16.4%) and sporting goods and accessories stores (-13.1%). Sales increased in all provinces except Prince Edward Island (-1.6%) and British Columbia (-0.9%), advances ranging from 10.3% for Manitoba to 0.6% for New Brunswick. Montreal sales rose 4.5%; Toronto, 4.1%; and Winnipeg, 14.6%. Vancouver sales fell 1.0%.

Revised total retail trade without seasonal adjustment for March 1982 was \$7,420.1 million, up 4.5% from March 1981.

Cumulative sales for January to April 1982 were \$28,629.7 million, an increase of 2.8% over the same period in 1981.

Seasonally adjusted, retail trade for April 1982 was at a level of \$7,962.0 million, down 0.4% from \$7,990.6 million in March. Sporting goods and accessories stores (-11.0%) and motor vehicle dealers (-8.1%) registered the largest decreases, while the largest increases were in family clothing stores (+6.7%) and pharmacies, patent medicine and cosmetics stores (+6.3%). Retail sales decreased from March in six provinces, losses ranging from -3.7% for Prince Edward Island to -0.4% for both Nova Scotia and Ontario.

For further information, order the April 1982 issue of *Retail Trade* (63-005, \$3.50/\$35), or contact the Retail Trade Section (613-996-9304), Merchandising and Services Division, Statistics Canada, Ottawa K1A 0V4.

Restaurant Statistics

Preliminary estimates for April 1982 show restaurants, caterers and taverns in Canada had sales totalling \$760.8 million. Final estimates for March 1982 indicate total sales of \$725.6 million.

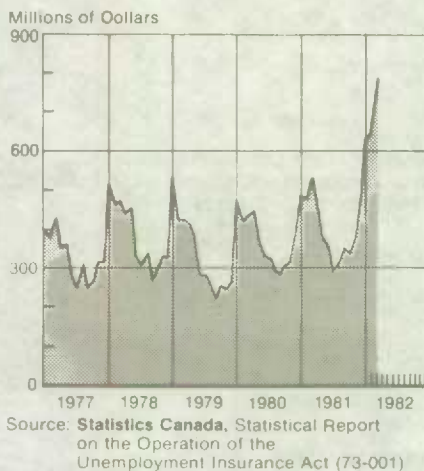
For further information on sales of chains versus independents and provincial sales by kind of business, order the April 1982 issue of *Restaurant, Caterer and Tavern Statistics* (63-011, \$1.50/\$15), or contact R. Bennett (613-996-9301).

Provincial Governments

The general government services in Canada's provincial and territorial governments reported gross payrolls for the first quarter of 1982 of \$2,111 million. The number of employees reported for the last pay period of March 1982 was 402,743.

Data are presently available from matrix 2722 of the CANSIM data bank and from the January-March 1982 issue of *Provincial Government Employment* (72-007, \$5/\$20).

Unemployment Insurance Commission Benefit Payments



Income Distributions, 1980

Final estimates from the annual Survey of Consumer Finances indicate that average family income (total money income before taxes and deductions) rose to \$27,398 in 1980 from \$24,245 in 1979, an increase of 13%. However, most of this increase was wiped out by inflation and thus in terms of real purchasing power the average income increased by 3%.

The average income of unattached individuals moved to \$11,403 in 1980, up from \$10,375 in 1979, an increase of 10% in current dollars. After adjusting for the rise in consumer prices, real incomes of unattached individuals remained virtually the same over the two years.

Estimates were prepared from data collected by a sample survey of 17,200 dwellings taken in the Spring of 1981. These estimates — which exclude households in the Yukon and Northwest Territories, on Indian reserves and the institutional population — are subject to the usual errors present in sample surveys.

For further information, order *Income Distributions by Size in Canada, 1980* (13-207, Canada: \$8; other countries: \$9.60), or contact the Data Dissemination Unit (613-996-5294), Consumer Income and Expenditure Division, Statistics Canada, Ottawa K1A 0T6.

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Unemployment Insurance

Unemployment insurance benefits paid out in March 1982 reached an all-time high of \$786 million, the largest sum paid out in one month since the program was initiated in 1943. Benefits were up 21% from the February level, and 48% higher than in March 1981.

Persons qualifying for benefits for the week ending March 20 numbered 1,133,000, also the highest level since beneficiary statistics were first compiled in 1975. The beneficiary count was up 2% from February and 31% more than in March 1981.

Applications for benefits in March totalled 303,000, a record high for this month, up 18% from February and 52% from March 1981 (the sharpest increase between these two months in recent years).

For further information, order the January-March 1982 issue of *Statistical Report on the Operation of the Unemployment Insurance Act* (73-001, \$6/\$24), or contact George Fincham (613-995-8445), Labour Division, Statistics Canada, Ottawa K1A 0V1.

Employment/Earnings

First estimates show the Canada industrial composite index of employment (1961=100) decreased 0.8% to 151.5 in March 1982 from 152.7 in February. Lower employment levels were registered in all industry divisions except forestry, which showed an increase. All regions contributed to the overall decrease except the Atlantic region.

Average weekly earnings at the national industrial level were \$381.11 in March, unchanged from February. Lower average weekly earnings in mining (including milling), trade and finance, insurance and real estate were offset by increases in the other industry divisions. Decreases were posted in the Prairie region and British Columbia, while the remaining regions showed increases.

Average weekly hours increased in mining (including milling), but decreased in manufacturing and construction. Average hourly earnings increased in manufacturing and construction but decreased in mining (including milling).

Detailed information for January and February will be published in the March 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.

Steel Ingot Production

Preliminary estimates show steel ingot production in May 1982 was 1 194 894 tonnes, down from 1 493 368 tonnes a year earlier. Pig iron production declined to 736 346 tonnes in the latest month from 1 137 465 tonnes in May 1981.

For further information, order the May 1982 issue of *Primary Iron and Steel* (41-001, \$2.50/\$25), or contact Gerry W. Barrett (613-992-0388), Manufacturing and Primary Industries Division, Statistics Canada, Ottawa K1A 0T6.



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AGRICULTURE STATISTICS

Fruit and Vegetable Production, June 1982
Production and Stocks of Eggs and Poultry, March 1982
Stocks of Fruit and Vegetables, May 1, 1982
The Dairy Review, April 1982

CENSUS

Population: Geographic Distributions, Newfoundland, 1981 Census of Canada
Population: Geographic Distributions, Northwest Territories, 1981 Census of Canada
Population: Geographic Distributions, Yukon, 1981 Census of Canada

CONSTRUCTION

Housing Starts and Completions, February 1982

CONSUMER INCOME AND EXPENDITURE

Income Distributions by Size in Canada, 1980

EDUCATION, SCIENCE AND CULTURE**SERVICE BULLETIN**

Culture Statistics, Vol. 5, No. 5, Film Industry, 1980

EXTERNAL TRADE

Exports by Countries, January-March 1982

FINANCIAL FLOWS AND MULTINATIONAL ENTERPRISES

Travel between Canada and Other Countries, January-March 1982

LABOUR

Employment, Earnings and Hours, January 1982
Statistical Report on the Operation of the Unemployment Insurance Act,
October-December 1981

LABOUR FORCE SURVEY

The Labour Force, May 1982

MANUFACTURING AND PRIMARY INDUSTRIES

Asphalt Roofing, April 1982
Bakeries, 1980
Cement, April 1982
Cement Manufacturers, 1980
Coal and Coke Statistics, March 1982
Crude Petroleum and Natural Gas Production, February 1982
Electric Lamp and Shade Manufacturers, 1980
Fabricated Structural Metal Industry, 1980
Factory Sales of Electric Storage Batteries, April 1982
Footwear Statistics, April 1982
Industrial Chemicals and Synthetic Resins, April 1982
Inventories, Shipments and Orders in Manufacturing Industries, March 1982
Man-made Fibre, Yarn and Cloth Mills, 1980
Oil Pipe Line Transport, March 1982
Oils and Fats, April 1982
Ornamental and Architectural Metal Industry, 1980
Printing, Publishing and Allied Industries, 1980
Production and Sales of Phonograph Records and Pre-recorded Tapes in Canada,
April 1982
Production, Shipments and Stocks on Hand of Sawmills in British Columbia,
March 1982
Signs and Displays Industry, 1980
Specified Domestic Electrical Appliances, April 1982
Steel Wire and Specified Wire Products, April 1982

MERCHANDISING AND SERVICES

New Motor Vehicle Sales, March 1982

PRICES

Construction Price Statistics, May 1982
Industry Price Indexes, April 1982

PUBLIC FINANCE

Provincial Government Finance, Revenue and Expenditure, 1979

TRANSPORTATION AND COMMUNICATIONS

Telephone Statistics, April 1982
Urban Transit, April 1982

SERVICE BULLETINS

Railway Transport, Vol. 12, No. 3, Railway Carloadings, April 1982; Railway Operating
Statistics, December 1981

Water Transport, Vol. 12, No. 4, International Cargoes Handled at Canadian Ports,
1980 Preliminary; No. 5, Cargo Loaded and Unloaded in Coastwise Shipping by Vessels
of Foreign Registries, January-March 1982 and 1981

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45-002	\$2.50/\$25	\$3/\$30
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31-001	\$3.50/\$35	\$4.20/\$42
34-208	\$4.50	\$5.40
55-001	\$2.50/\$25	\$3/\$30
32-006	\$1.50/\$15	\$1.80/\$18
41-221	\$4.50	\$5.40
36-203	\$6	\$7.20
47-004	\$1.50/\$15	\$1.80/\$18
35-003	\$2.50/\$25	\$3/\$30
47-209	\$4.50	\$5.40
43-003	\$1.50/\$15	\$1.80/\$18
41-006	\$1.50/\$15	\$1.80/\$18
63-007	\$2.50/\$25	\$3/\$30
62-007	\$3/\$30	\$3.60/\$36
62-011	\$3.50/\$35	\$4.20/\$42
68-207	\$8	\$9.60
56-002	\$1.50/\$15	\$1.80/\$18
53-003	\$1.50/\$15	\$1.80/\$18
52-004	\$1.50/\$15	\$1.80/\$18
54-003	\$1.50/\$15	\$1.80/\$18

Canada