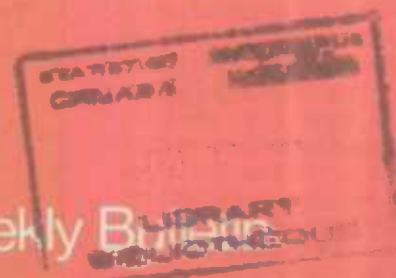


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Weekly Bulletin



July 23, 1982

## Consumer Price Index

The Consumer Price Index (CPI) for Canada (1971=100) advanced by 1.0% in June 1982 to 263.4 from 260.8 in May. The 12-month rise between June 1981 and June 1982 stood at 11.2%, down from the 11.8% increase registered between May 1981 and May 1982. Approximately one-half of the latest monthly increase was attributable to higher food prices while the combined effects of higher housing charges, increased tobacco and alcohol prices and higher transportation costs accounted for most of the remaining increase in the all-items index. Between May and June, the food index advanced 2.2%, the second consecutive month in which an increase of this magnitude has been recorded. In contrast, the all-items-excluding-food index rose by 0.7% between May and June, down significantly from the increase of 1.1% registered in the previous month.

Higher prices for fresh vegetables — most notably for potatoes and tomatoes — coupled with increased prices for beef and pork cuts were largely responsible for the 2.1% increase in the food-purchased-from-stores index. The food-purchased-from-restaurants index advanced 2.2% in June; the latest monthly increase in this index resulted primarily from the introduction of changes to the provincial retail sales tax on restaurant and carry-out meals in the province of Ontario.

Higher shelter charges for both rented and owned accommodation, coupled with provincial budget changes affecting certain retail prices were largely responsible for the 0.7% increase in the all-items-excluding-food index. In the provinces of Newfoundland, Quebec, Ontario and Manitoba, tax changes announced in the recent provincial budgets were largely responsible for the rise in the prices for tobacco and alcohol products in those provinces.

Viewed in terms of goods and services, the price level for both goods and services advanced by 1.0%. As a result, between June 1981 and June 1982, the price level for goods advanced by 9.9%, while that for services rose 13.2%.

On a seasonally adjusted basis, the all-items CPI rose 0.8% in June; this comprised a 1.5% increase in the food index and a 0.8% increase in the all-items-excluding-food index.

## LATEST MONTHLY STATISTICS

### EMPLOYMENT, INCOME

			Previous Month	% Change From Year Ago
Average Weekly Earnings (\$)	Apr.	385.20p	384.23p	10.7
Labour Income (\$ million)	Apr.*	16,382.5p	16,246.2p	9.8
Persons with Jobs (million)	June	10.89	10.70	-3.8
Unemployed	June	1,303,000	1,241,000	52.4

### INVENTORIES

Department Store (\$ million)	May*	2,760.0	3,324.8	-9.2
Manufacturers' Owned (\$ million)	Apr.	34,235.4p	34,527.6r	10.0

### ORDERS

Manufacturers' New Orders (\$ million)	Apr.	15,158.9p	16,464.2r	-8.0
Manufacturers' Unfilled Orders (\$ million)	Apr.	18,032.0p	18,013.0r	-8.6

### PRICES

Consumer Price Index (1971=100)	June*	263.4	260.8	11.2
New House Price Index (1976=100)	May	133.7	134.9	-0.5
Raw Materials Price Index (1977=100)	May	200.4p	198.2p	10.9
Excl. coal, crude oil, nat. gas	May	154.5p	151.1p	-1.3
Industry Selling Price Index (1971=100)	May	288.5p	287.4p	6.9

### CONSTRUCTION

Building Permits (\$ million)	Apr.	1,010.5p	3,865.4p	-24.6
Housing Starts — Urban Centres (units)	Apr.	9,061	35,327	-5.5

### ENERGY

Coal Production (thousand tonnes)	Apr.	3,816.1	14,807.2	6.1
Electricity Generation (terawatt hours)	Apr.	30.9	139.7	3.8
Natural Gas Production (million cubic metres)	Mar.	9,127.4	28,801.6	5.0
Petroleum Refining (million cubic metres)	May*	6.2p	35.5p	-19.5

### FOREIGN TRADE

Exports — Balance of Payments Basis (\$ million)	May	7,415p	34,889p	1.1
Imports — Balance of Payments Basis (\$ million)	May	5,763p	28,972p	-9.6

### PRODUCTION

Railway Carloadings (million tonnes)	May	20.1	89.0	-6.6
Steel (ingots — thousand tonnes)	Mar.	1,246.3	3,654.3	-12.5

### SALES

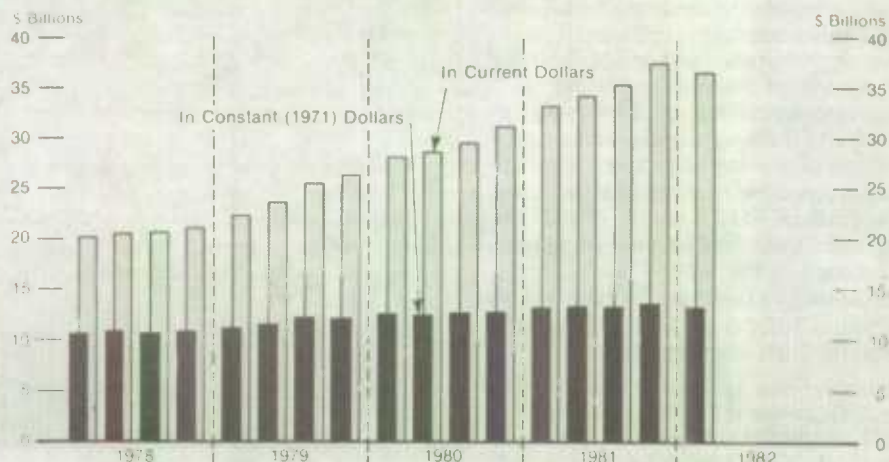
Department Store Sales (\$ million)	May	811.1	3,475.3	-1.2
Manufacturers' Shipments (\$ million)	Apr.	15,139.9p	60,110.9p	-1.0
New Motor Vehicle Sales (\$ million)	May	1,011.8	4,283.8	-20.1
Retail Sales (\$ million)	May*	8,495.9p	37,117.5p	2.8

Statistics are in current dollars and are not seasonally adjusted.

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

## Non-Residential Construction Expenditures

Data Seasonally Adjusted at Annual Rates



Source: Statistics Canada, National Income and Expenditure Accounts (13-001)



## Retail Trade

Total retail sales without seasonal adjustment for May 1982 were \$8,495.9 million, an increase of 2.9% from May 1981. Sales were higher in 21 of the 28 trade groups with the largest gains posted in all other food stores (+21.8%), used car dealers (+17.3%) and service stations (+16.4%). The largest sales decreases were for household furniture stores (-20.3%), furniture, TV, radio and appliance stores (-14.5%) and motor vehicle dealers (-12.2%). Sales increased in all provinces except British Columbia (-5.0%) and Prince Edward Island (-0.2%), advances ranging from 9.1% for Manitoba to 0.2% for New Brunswick. Montreal sales rose 5.6%; Toronto, 3.0% and Winnipeg, 13.5%. Vancouver sales fell 4.3%.

Revised total retail trade without seasonal adjustment for April 1982 was \$8,040.7 million, up 3.1% from April 1981.

Cumulative sales for January to May 1982 were \$37,117.5 million, an increase of 2.8% over the same period in 1981.

Seasonally adjusted, retail sales for May 1982 were at a level of \$8,241.2 million, up 3.6% from \$7,954.0 million in April. Automotive parts and accessories stores (+11.0%), garages (+9.3%) and sporting goods and accessories stores (+6.4%) registered the largest increases, while the largest decreases were in florists (-6.1%) and pharmacies, patent medicine and cosmetics stores (-3.1%). Retail sales increased from April in five provinces, gains ranging from 6.7% for Quebec to 0.4% for both Nova Scotia and British Columbia.

*For further information, order the May 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.*

## Department Store Sales

Department stores in Canada had sales totalling \$811.1 million in May 1982, a decrease of 1.4% from May 1981. Sales were down in 21 of the 40 departments, with the largest decreases posted in furs (-46.5%), major appliances (-30.2%) and furniture (-26.7%). The largest sales increases were in "all other departments" (21.8%) and infants' and children's wear and nursery equipment (15.9%).

Department store sales in May showed decreases from the year-earlier period in five provinces, ranging from 8.7% for British Columbia to 0.3% for Ontario and Alberta. Sales and percentage changes for metropolitan areas were: Montreal, \$89.5 million, -5.1%; Toronto, \$112.2 million, -5.1%; Winnipeg, \$39.0 million, +6.8%; and Vancouver, \$78.3 million, -8.9%.

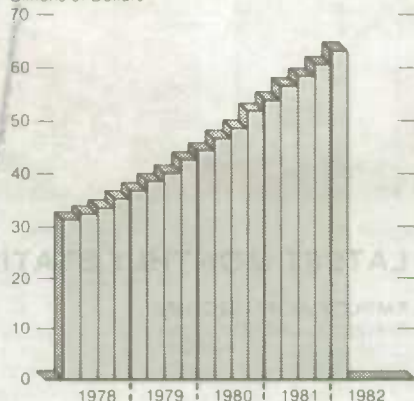
The selling value of stocks held in May 1982 at \$3,120.6 million showed an increase of 2.6% from May 1981.

*For further information, order the May 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.*

## Trusteed Pension Funds

Quarterly Estimates of Assets Held

Billions of Dollars



Source: Statistics Canada, Quarterly Estimates of Trusteed Pension Funds (74-001)

## Help-Wanted Index

The seasonally adjusted help-wanted index (1969=100) dropped to 100 in the second quarter of 1982, reaching the lowest level since 1971. The index fell sharply from both the first quarter of 1982 (-34%) and the second quarter of 1981 (-55%). The largest decreases were recorded in British Columbia and the Prairie provinces, the smallest in the Atlantic provinces.

## Petroleum Industry, 1983

In 1983, companies in the petroleum and natural gas industry expect to spend close to \$800 million on research and development, an increase of more than 200% over 1979.

*More details will be made available in the Service Bulletin (Catalogue 13-003, Vol. 6, No. 8), "R & D in the Petroleum Industry, 1983 Forecast" planned for release this month.*

## Trusteed Pension Funds

Preliminary estimates show the book value of assets held in trusteed pension funds was \$63.1 billion at the end of the first quarter of 1982, an increase of nearly \$2.6 billion from the preceding quarter and up \$9.2 billion over the amount held a year earlier.

Income of these funds for the first quarter of 1982 — comprising employee and employer contributions of \$1.6 billion, investment income of \$1.3 billion and other income of about \$80 million — amounted to nearly \$3 billion. Out of this revenue, expenditures of \$769 million were met, leaving a net cash flow of \$2.2 billion for the quarter.

*For further information, order the first quarter 1982 issue of Quarterly Estimates of Trusteed Pension Funds (74-001, \$2.50/\$10), or contact Hubert Frenken (613-995-4476), Pensions Section, Labour Division, Statistics Canada, Ottawa K1A 0T6.*

## Restaurant Statistics

Preliminary estimates for May 1982 show restaurants, caterers and taverns in Canada had sales totalling \$848.9 million. Final estimates for April 1982 indicate total sales of \$772.5 million.

*For further information on sales of chains versus independents and provincial sales by kind of business, order Restaurant, Caterer and Tavern Statistics (63-011, \$1.50/\$15).*

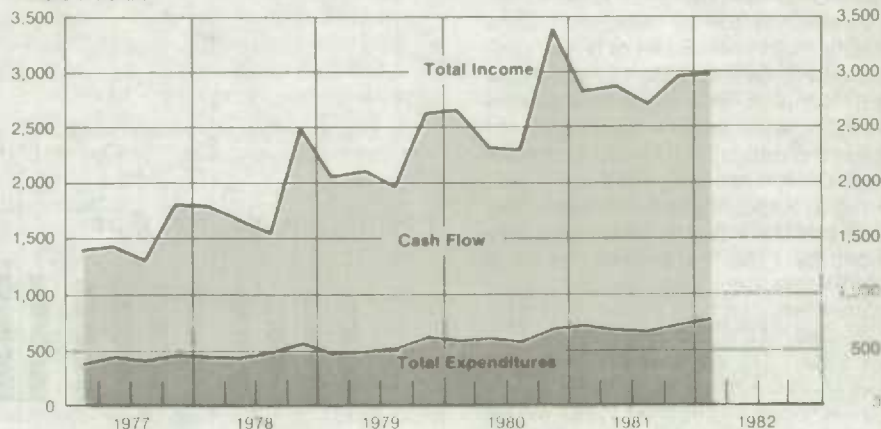
## Telephone Statistics

Canada's 13 major telephone systems reported revenues of \$634.4 million in May 1982, an increase of 15.5% from a year earlier. Operating expenses were up 15.4% to \$451.8 million. Net operating revenue at \$182.6 million showed an increase of 15.7% over May 1981. Telephone toll messages rose 0.9% to 122.8 million.

*For further information, order the May 1982 issue of Telephone Statistics (56-002, \$1.50/\$15).*

## Quarterly Estimates of Income and Expenditures of Trusteed Pension Funds

Millions of Dollars



Source: Statistics Canada, Quarterly Estimates of Trusteed Pension Funds (74-001)



## Current Economic Analysis

There were no obvious signs of an easing of the rate of decline of aggregate economic activity in Canada, based on partial data for the second quarter of 1982. Output continued to contract in April, while employment fell steadily throughout the second quarter. The balance of the sources of weakness appears to be shifting away from declines in consumer and export demand — which initiated the recession in July 1981 — towards large cutbacks in business fixed investment and inventories. At the same time, the upturn in food prices in April and May has helped to sustain inflation at high rates in the second quarter.

The downturn in business investment appears to be intensifying following a sharp reversal in the first quarter. The drop in outlays for plant and equipment is evident in the large declines in the related data for employment, shipments and imports early in the second quarter. The downturn in business fixed investment is a lagged response to the constriction of corporate profitability that began in mid-1981 and the continued high cost of external financing. Cyclical downturns in business investment typically lag behind the downturn of total demand because of the longer lags in the production process in this sector.

The process of inventory liquidation appears to be continuing at a rapid rate in April, following the \$2.2 billion decline in real inventories in the first quarter. The duration of inventory reduction may be prolonged by the continuing high level of stocks relative to sales, as demand remains depressed, and by the desire of firms to control costs and to improve their balance sheets. Inventories were reduced sharply in the wholesale and manufacturing sectors in April — notably for raw materials — and this weakness has been translated into large cutbacks in output and employment in primary industries such as mining and forestry.

Consumer and export demand show some signs of firming in the second quarter, particularly as sales of motor vehicles strengthened in Canada and the United States. The resiliency of these gains to the restraining effects of the recent upturn in interest rates and weak real income, however, remains unproven. In particular, the continued weakness in labour income in Canada suggests that a revival of consumer demand will have to be driven by a reduction in personal savings. The prospects for an improvement of demand in the United States appear to be more promising. The unsettled condition of financial markets, however, serve as a reminder of the hesitant nature of the improvement in the U.S. economy.

For the 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).

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## Refined Petroleum Products

Preliminary data show net sales in Canada of all refined petroleum products dropped 11.3% to 6 494.9 thousand cubic metres in May 1982 from 7 323.8 thousand cubic metres a year earlier.

Canadian refineries produced 6 152.7 thousand cubic metres of refined petroleum products in the latest month, down 26.7% from 8 396.7 thousand cubic metres in May 1981.

For further information, order the May 1982 issue of *Refined Petroleum Products* (45-004, \$3.50/\$35), or contact R. Godin (613-996-3139), Manufacturing and Primary Industries Division, Statistics Canada, Ottawa K1A 0T6.

## Education Statistics

Total expenditures on education in Canada reached \$20.2 billion in 1979-80, up 9.7% from the previous year. These expenditures amounted to 7.5% of the Gross Domestic Product (GDP), or 9.6% of personal income. Governments at the federal, provincial and local levels provided more than 90% of the total, with fees and miscellaneous revenues accounting for the rest. Public sector contributions (\$18.7 billion) represented 17% of total government budgets and education costs averaged \$1,705 for each member of the labour force.

The elementary-secondary level received two-thirds of the total education budget in 1979-80, while its share of the enrolment was almost 90%.

The postsecondary level received 27.4% of the total education budget in 1979-80, the largest portion going to universities (63%) and community colleges (26%), with direct aid to students and departmental expenses accounting for the balance.

For further information, order the publication *Financial Statistics of Education* (81-208, \$7).

## Petroleum/Natural Gas

Canadian production of crude petroleum and equivalent hydrocarbons in April 1982 amounted to 4 901 900 cubic metres, down 28.1% from 6 800 000 cubic metres a year earlier.

Net new production of natural gas amounted to 8 188.9 million cubic metres in the latest month, an increase of 1.9% from 8 034.2 million cubic metres in April 1981.

## Farm Cash Receipts

Farm cash receipts are estimated at \$7.5 billion for January-May 1982, a 9% decrease from \$8.1 billion for the year-earlier period.

Receipts from the sale of crops continue to decline — the \$3.6 billion received in January-May 1982 represents a 17% drop from the same period a year ago. This decline is primarily due to lower Canadian Wheat Board payments (\$568 million in 1982 compared with \$1.2 billion in 1981), and lower initial prices for wheat, partly offsetting was the large level of deferred grain receipts which were liquidated in 1982.

Livestock receipts were up 3% in the latest period due largely to higher receipts for hogs and dairy products.

For further information, order the January-May 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.

## Radio/TV Broadcasting

Preliminary results for 1981 indicate privately-held radio broadcasting revenues for the year ended August 31, 1981 were up 12% from the previous year to \$445 million. Programming, technical, sales and administrative expenses rose 12% to \$377 million. Depreciation was \$15 million and interest expense was \$22 million; other adjustments produced revenues of \$7 million. Net profit before tax was \$39 million, down from \$45 million in 1980.

Television broadcasting revenues increased 16% to \$652 million. Programming, technical, sales and administrative expenses rose 12% to \$486 million. Depreciation was \$22 million and interest expense \$24 million; other adjustments produced income of \$7 million. Net profit before tax was estimated at \$128 million, an increase of 24% over 1980.

In addition, CBC operations produced revenues from sale of airtime of \$102 million, up from \$101 million in the previous period. The net cost of operating the CBC during the period was \$586 million, up from \$543 million the previous year.

Further information will be included in the 1981 issue of *Radio and Television Broadcasting* (56-204, \$6). For further information, contact J.R. Slattery (613-996-9271).

## Security Transactions

Transactions with non-residents in outstanding Canadian securities resulted in a net capital inflow from abroad of \$96 million in April. Non-resident investment in outstanding Canadian bonds, mainly Government of Canada issues, produced a net capital inflow of \$125 million, bringing to nearly \$500 million the value of net sales this year.

For further information, order the April 1982 issue of *Security Transactions with Non-residents* (67-002, \$2.50/\$25).



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The Dairy Review, May 1982	23-001	\$2.50/\$25	\$3/\$30
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Canadian Statistical Review, June 1982	11-003E	\$3.50/\$35	\$4.20/\$42
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<b>EDUCATION, SCIENCE AND CULTURE SERVICE BULLETIN</b>			
Science Statistics — Vol. 6, No. 7, Federal Government Activities in the Social Sciences, 1973-74 to 1982-83	13-003	\$1.50/\$15	\$1.80/\$18
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Vital Statistics, January-March 1982	84-001	\$2.50/\$10	\$3/\$12
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Gross Domestic Product by Industry, April 1982	61-005	\$3/\$30	\$3.60/\$36
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Benefit Periods Established and Terminated Under the Unemployment Insurance Act, 1979	73-201	\$6	\$7.20
Preliminary Unemployment Insurance Statistics, March 1982	73-001p	N/C	N/C
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Pulpwood and Wood Residue Statistics, May 1982	25-001	\$1.50/\$15	\$1.80/\$18
Rigid Insulating Board, May 1982	36-002	\$1.50/\$15	\$1.80/\$18
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<b>MERCHANDISING AND SERVICES</b>			
Department Store Sales by Regions, May 1982	63-004	\$1.50/\$15	\$1.80/\$18
Merchandising Inventories, April 1982	63-014	\$2.50/\$25	\$3/\$30
Wholesale Trade, April 1982	63-008	\$1.50/\$15	\$1.80/\$18
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The Consumer Price Index, June 1982	62-001	\$2.50/\$25	\$3/\$30
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Railway Carloadings, May 1982	52-001	\$1.50/\$15	\$1.80/\$18
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Aviation Statistics Centre — Vol. 14, No. 6, Canadian Air Transport Industry, Summary Statistics	51-004	\$1.50/\$15	\$1.80/\$18

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