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Balance of Payments

During the second quarter of 1982, current account transactions on a seasonally adjusted basis produced a record surplus for Canada of \$588 million, due mainly to a substantial increase in merchandise exports, despite a large increase in interest payments.

Among capital transactions, direct investment flows moderated as a result of a slackening of takeover activities. Concurrently, the operations of the chartered banks shifted to a net outflow, reversing the recent trend of net borrowings from abroad. A record decrease in net official monetary assets compensated for the net outflow from current and capital account transactions. These developments were accompanied by a marked depreciation of the Canadian dollar vis-à-vis its United States counterpart.

Some of the main quarterly features:

- a seasonally adjusted current account surplus of \$588 million — more than double the surplus in the first quarter — resulting from an increase of about \$1.2 billion in the merchandise trade surplus;
- an increase of 5% in the value of merchandise exports to \$21.5 billion, in contrast to a drop of 4% in the preceding quarter. Imports continued to decline, but marginally to \$16.8 billion as against a drop of 9% in the first quarter;
- among exports, relatively significant increases in automotive products, wheat, lumber, steel and barley, while decreases were registered in natural gas, industrial machinery, iron ores and crude petroleum;
- among imports, declines in crude petroleum, industrial machinery, chemicals, steel and agricultural machinery; increases were recorded in automotive products and coal;
- in volume terms exports increased by 7% while imports decreased by less than 1%, as against a decline of over 2% and 8% in exports and imports respectively, in the first quarter;
- an increase of about \$800 million to \$4.1 billion in the deficit of non-merchandise transactions, arising principally from an increase in net interest payments. The deficit on travel rose by 8% to \$348 million while the surplus on freight and shipping more than doubled to \$273 million;

(continued on next page)

LATEST MONTHLY STATISTICS

EMPLOYMENT, INCOME

| | | | Previous Month | % Change From Year Ago |
|------------------------------|-------|-----------|----------------|------------------------|
| Average Weekly Earnings (\$) | May | 387.02p | 387.58p | 9.7 |
| Labour Income (\$ million) | June* | 16,922.3p | 16,523.1p | 4.9 |
| Persons with Jobs (million) | July | 11.00 | 10.89 | -4.0 |
| Unemployed | July | 1,386,000 | 1,303,000 | 66.0 |

INVENTORIES

| | | | | |
|-----------------------------------|------|-----------|-----------|-----|
| Department Store (\$ million) | June | 2,909.1 | 3,120.6 | 8.0 |
| Manufacturers' Owned (\$ million) | June | 33,515.0p | 33,812.7r | 5.6 |

ORDERS

| | | | | |
|---|------|-----------|-----------|-------|
| Manufacturers' New Orders (\$ million) | June | 16,362.6p | 15,292.2r | -10.2 |
| Manufacturers' Unfilled Orders (\$ million) | June | 17,467.5p | 17,794.3r | -5.7 |

PRICES

| | | | | |
|---|------|--------|--------|------|
| Consumer Price Index (1971=100) | July | 264.8 | 263.4 | 10.8 |
| New House Price Index (1976=100) | July | 132.2 | 133.1 | -2.2 |
| Raw Materials Price Index (1977=100) | July | 204.9p | 200.1p | 7.3 |
| Excl. coal, crude oil, nat. gas | July | 151.8p | 153.5p | -3.3 |
| Industry Selling Price Index (1971=100) | July | 290.5p | 289.8p | 5.9 |

CONSTRUCTION

| | | | | |
|--|------|--------|----------|-------|
| Building Permits (\$ million) | June | 987.3p | 6,028.6p | -32.6 |
| Housing Starts — Urban Centres (units) | July | 8,065 | 60,970 | -27.4 |

ENERGY

| | | | | |
|---|-------|---------|----------|-------|
| Coal Production (thousand tonnes) | June* | 3,722 | 22,441 | 11.7 |
| Electricity Generation (terawatt hours) | June* | 28.2 | 194.4 | 1.5 |
| Natural Gas Production (million cubic metres) | May | 7,336.3 | 44,326.8 | 3.6 |
| Petroleum Refining (million cubic metres) | June | 7.4p | 43.6p | -17.3 |

FOREIGN TRADE

| | | | | |
|--|------|--------|---------|-------|
| Exports — Balance of Payments Basis (\$ million) | June | 7,826p | 42,764p | 0.7 |
| Imports — Balance of Payments Basis (\$ million) | June | 5,915p | 34,876p | -11.5 |

PRODUCTION

| | | | | |
|--------------------------------------|------|-------|---------|-------|
| Railway Carloadings (million tonnes) | July | 16.0 | 124.1 | -8.3 |
| Steel (ingots — thousand tonnes) | June | 964.6 | 7,243.7 | -15.5 |

SALES

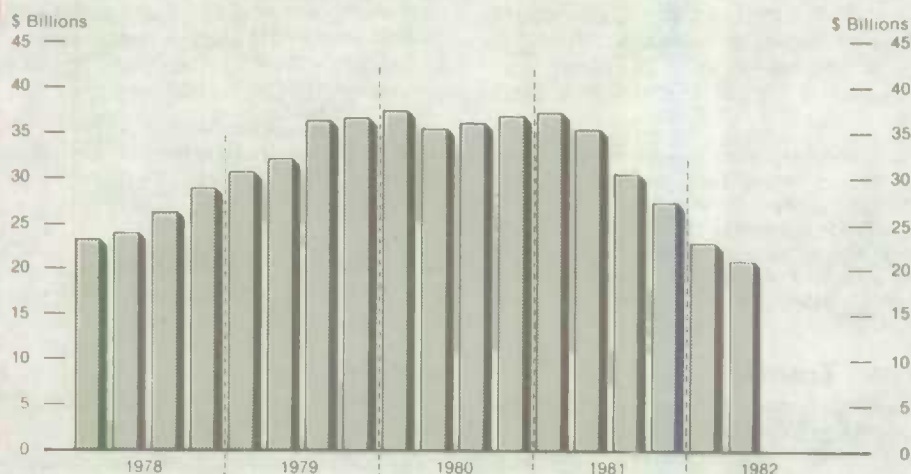
| | | | | |
|---------------------------------------|-------|-----------|-----------|-------|
| Department Store Sales (\$ million) | July* | 759.2 | 5,025.2 | -1.7 |
| Manufacturers' Shipments (\$ million) | June | 16,689.4p | 92,266.5p | -2.4 |
| New Motor Vehicle Sales (\$ million) | June | 1,093.3 | 5,377.1 | -18.0 |
| Retail Sales (\$ million) | June | 8,389.7p | 45,476.0p | 2.5 |

Statistics are in current dollars and are not seasonally adjusted.

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

Corporation Profits (Before Taxes)

(Data Seasonally Adjusted at Annual Rates)



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

- unadjusted for seasonal variations, a current account surplus of \$467 million, a swing of about \$2.5 billion from the second quarter of 1981, produced by a significant rise in the merchandise trade surplus. At \$22.4 billion, exports were at about the same level as in the corresponding quarter in 1981 but imports, at \$17.9 billion, were some 15% below.

For further information, contact L. Laliberté (613-996-2545), Balance of Payments Division, Statistics Canada, Ottawa K1A 0T6.

Canada's Merchandise Trade

On a seasonally adjusted balance-of-payments basis, preliminary results indicate that Canada's exports increased 1.2% or \$88 million to \$7.46 billion in July 1982 following an increase of 4.6% in June. After declines of 4.8% in May and 4.2% in June, imports increased substantially in July, up 10.1% or \$540 million to \$5.90 billion. As a result, the merchandise trade surplus declined \$451 million from a \$2.01 billion record level reached in June to \$1.56 billion in July. The year-to-date surplus of \$9.8 billion is already \$1.3 billion higher than the record annual surplus of \$8.5 billion posted in 1980.

Commodity Analysis

On a customs basis, for seasonally adjusted domestic exports, the largest decrease recorded in July 1982 was for motor vehicle products (down 18% or \$305 million to \$1.42 billion following a \$125 million increase in June), thus ending the five consecutive monthly advances recorded between February and June of this year. The largest increases were for non-ferrous metal exports (up 23% or \$85 million to \$460 million, after a \$20 million increase in June), chemicals, including fertilizers (up 25% or \$75 million to \$390 million, following a \$40 million decrease in June), and metal ores, concentrates and scrap (up 30% or \$60 million to \$270 million after a \$110 million decrease in June).

The largest increases in imports for July 1982 were for motor vehicle products, up 11.2% or \$145 million to \$1.43 billion following a \$125 million decline in June (this increase is partly due to the end of the deceleration in the rate of entry of passenger cars from Japan), non-ferrous metals (up 70% or \$70 million to \$175 million) and hardware (up 69% or \$65 million to \$160 million).

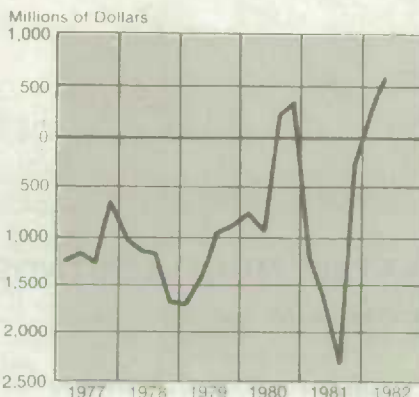
For further information, order the July 1982 issue of *Summary of External Trade* (65-001, \$3/\$30), or contact Gordon Blaney (613-995-6305), Trade Inquiries Unit, Pierre Pichette or Henry Glouchkow (613-995-6115), Trade Measures and Analysis Section, External Trade Division, Statistics Canada, Ottawa K1A 0T6.

Urban Transit

Canadian urban transit systems (58) collected 91,783,218 initial passenger fares in July 1982. The total distance run was 54 227 635 kilometres and operating revenues amounted to \$50.1 million.

Canadian Balance of International Payments

Current Account — Seasonally Adjusted



Source: Statistics Canada, Quarterly Estimates of the Canadian Balance of International Payments (67-001)

Railway Carloadings

Revenue freight loaded by railways in Canada in July 1982 totalled 16.1 million tonnes, a drop of 13.6% from the year-earlier level. The carriers received an additional 1.0 million tonnes from the United States, down 27.6% from July 1981.

Commodities registering notable changes in volumes loaded in the latest month were: coal (up 44.5%); wheat (up 41.8%); grain, other than wheat (up 16.4%) and iron ore and concentrates (down 47.8%).

Total rail freight loadings in Canada during the first seven months of 1982 showed a decrease of 8.3% from the January-July 1981 period, while receipts from U.S. connections fell by 21.8%.

For further information, order the July 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.

Provincial Governments

Gross general revenues of provincial and territorial governments for the fiscal year ending March 31, 1982 are estimated at \$70,592.6 million, while gross general expenditure totals \$69,286.8 million.

For further information, order the 1981 issue of *Provincial Government Finance — Revenue and Expenditure (Estimates)* (68-205).

Oil Pipeline Transport

Net receipts of crude oil, condensates, pentanes plus, liquefied petroleum gases and petroleum products through Canadian oil pipelines in June 1982 totalled 10 241 571 cubic metres, up 4.4% from 9 808 931 cubic metres a year earlier.

For further information, order the June 1982 issue of *Oil Pipeline Transport* (55-001, \$2.50/\$25).

Department Store Sales

Department stores in Canada had sales totalling \$759.2 million in July 1982, up fractionally (0.2%) from a year earlier. Cumulative sales for the first seven months of 1982 were \$5,025.2 million, down 1.7% from the January-July 1981 period.

Department store sales by regions for the latest month were as follows, with percentage changes from July 1981 in brackets:

- Ontario, \$266.7 million (+3.1%)
- Quebec, \$133.8 million (-1.7%)
- British Columbia, \$132.4 million (-5.8%)
- Alberta, \$110.3 million (-3.0%)
- Atlantic provinces, \$52.1 million (+9.3%)
- Manitoba, \$41.1 million (+3.3%)
- Saskatchewan, \$22.8 million (+7.7%).

Data users should note that the British Columbia figures include as well those for the Yukon and Northwest Territories. See the July 1982 issue of *Department Store Sales by Regions* (63-004, \$1.50/\$15).

Labour Income

Labour income for the month of June 1982 was estimated at \$16,922.3 million, up \$794.6 million or 4.9% from June 1981.

Adjusted for seasonal variation, wages and salaries increased by \$49.4 million between May and June 1982 to \$15,220.6 million.

The estimates will be published in the April-June issue of *Estimates of Labour Income* (72-005, \$5/\$20). For further information contact G. Gauthier (613-995-8431), Labour Income Section, Labour Division, Statistics Canada, Ottawa K1A 0T6.

International Travel

Preliminary statistics for July 1982 show that 5.5 million United States residents entered Canada, down 5.6% from a year earlier. Visitors from countries other than the U.S. declined by 9.8% to 376,200. Canadian residents re-entering Canada after visits to the U.S. numbered 3.9 million, down 7.1% from July 1981, while residents returning from other countries decreased by 0.9% to 117,500.

For the first seven months of 1982, the international travel flows were as follows: 18.4 million U.S. residents entered Canada, down 24.1% from January-July 1981 (this notable drop in total entries was mainly due to the disappearance of the gasoline price differential between the U.S. and Canada, which resulted in a sizeable reduction in the number of same-day automobile entries from the U.S.); visitors from countries other than the U.S. were down 8.3% to 1.1 million; Canadians returning from the U.S. declined by 3.2% to 19.2 million, while resident re-entries from other countries numbered 911,000, up 0.6% from the 1981 period.

For further information, order the July 1982 issue of *International Travel — Advance Information* (66-002, \$1.50/\$15), or contact Paul L. Paradis (613-995-0847), International Travel Section, Statistics Canada, Ottawa K1A 0Z8.

Trade Figures Reconciled

After completion of the reconciliation of merchandise trade data for Canada and the United States, Canada had an estimated \$2.6 billion (\$U.S.) surplus in trade between the two countries in 1981, double the \$1.4 billion surplus posted in 1980.

Published Canadian trade statistics showed only a \$1.2 billion (\$U.S.) surplus, while United States statistics showed a \$6.9 billion (\$U.S.) Canadian surplus.

The largest reconciliation adjustment in 1981 was an addition of \$5.0 billion (\$U.S.) to United States exports, representing the non-receipt of export documents. The corresponding adjustment to Canadian exports was an addition of \$1.6 billion. Nearly 40% of Canadian non-receipts were for re-exports of goods to the United States.

Other significant adjustments included a reduction of Canadian imports by \$789 million (\$U.S.) for goods priced above transaction value. United States imports were reduced by \$867 million to remove transportation charges and increased by \$911 million for trade definition, most of which was for southbound electricity which the United States does not define as trade. Canadian exports were decreased by \$428 million for trade definition, substantially more than in the previous year because of an increase in exports of contractors' equipment and tools which are leased. The trade definition adjustment for United States exports dropped to \$150 million in 1981 from \$459 million in 1980 because of a marked decrease of imports by Canada of offshore swapped oil (i.e. crude petroleum received directly from third countries in exchange for crude petroleum received by the United States from Canada).

Data users should note that beginning in 1981, the values used in the reconciliation procedure include trade with the Virgin Islands. Puerto Rico has been included since January 1976. For further information, contact John Butterill (613-995-6115), Trade Measures and Analysis Section, External Trade Division, Statistics Canada, Ottawa K1A 0T6.

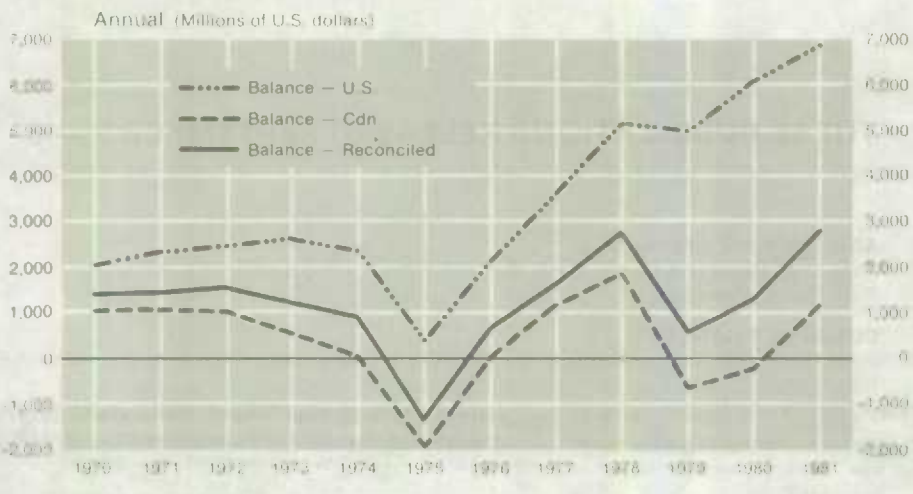
Railway Operating Statistics

The seven major railways in Canada reported a combined net loss from operations of \$31.1 million in March 1982. Operating revenues of \$556.3 million were up 2.2% from the 1981 level.

Revenue freight tonne-kilometres were down by 6.5% in March 1982; freight train-kilometres decreased 9.0% and freight car-kilometres 10.5%. Average revenue per tonne-kilometre of freight was 2.301 cents. Revenue passenger-kilometres decreased by 21.1% to 171.6 million.

For further information, order the March 1982 issue of Railway Operating Statistics (52-003, \$2.50/\$25), or contact J. Bustros (613-995-1976), Transportation and Communications Division, Statistics Canada, Ottawa K1A 0V1.

Merchandise Trade Balance Between the U.S. and Canada



Education Statistics, 1982-83

Canadian universities and colleges will be opening their doors this fall to what is likely to be the greatest number of students they will have to accommodate for some years to come.

Figures released recently in *Advance Statistics of Education, 1982-83* (catalogue 81-220, \$4.50) indicate that the 693,300 enrolment estimated for the 1982-83 academic year will not likely be surpassed in the foreseeable future.

Total full-time university enrolment is expected to be 414,200 in 1982, an increase of 3.2% over the 1981 academic year, and college enrolment is up 1.9% to 279,100.

Two factors appear to be largely responsible for the increase in postsecondary enrolment. The 18-24 age group, the primary source population for higher education, is expected to experience its final increase this year, as the tail end of the baby boom passes through these ages. More important, however, it is believed that poor labour market conditions (the high unemployment rate, particularly for young people, and diminished employment opportunities for students) contribute to the decision by many to stay in school. It is anticipated that if enrolment follows the demographic trend, 1983 is apt to mark a turnaround in postsecondary enrolment that will be followed by a prolonged decline.

Colleges and universities are expected to employ 56,295 full-time teachers, an increase of 1,315 over last year.

The total number of degrees granted by universities in 1982 is estimated to have remained at the 1981 level. However, the data show that for the first time, the number of bachelor's degrees granted to women in 1981 was greater than the number for men, and this trend is expected to persist.

Elementary and secondary school enrolment is continuing to decline. The 4,951,000 students expected to register this September represent a 1.5% drop from last

year and a 15.9% decline from the 1970 peak.

The latest decrease brings enrolment down to the 1964 level. However, the size of the elementary-secondary teaching force does not reflect the sharp reduction of students. The 269,300 teachers projected for this year (down 1% from a year earlier) far exceed the 205,800 who taught approximately the same number of students in 1964.

The decade-long decline is not reflected in Canada's private schools, as enrolment in these institutions is increasing. For example, in the three years from 1981 to 1984, public schools will have lost 154,000 students, while private schools will have gained 15,000.

The total education bill (in current dollars) continues to increase. However, as a percentage of GNP it remained unchanged in 1980 and 1981 at 7.8%. The per capita cost to Canadians in 1981 was \$1,072, or \$2,199 for each person in the labour force. In 1982-83, the cost of education in Canada is estimated at \$29 billion, and the following year it is expected to rise to \$32 billion. Of this amount, 93% comes from governments.

For further information, contact Dr. Zoltan Zsigmond (613-995-9685), Education, Science and Culture Division, or Kathy Kennedy (613-593-7444).

Coal and Coke Statistics

Production of coal in Canada rose 18.4% in June 1982 to 3 722 kilotonnes from 3 144 a year earlier. Exports declined to 1 407 kilotonnes from 1 565, while imports rose to 2 284 kilotonnes from 727.

Coal production in the first six months of 1982 reached 22 441 kilotonnes, up 11.7% from 20 103 in the January-June 1981 period. Exports were up to 8 362 kilotonnes from 7 978 and imports rose to 6 181 kilotonnes from 3 115.

For further information, order the June 1982 issue of Coal and Coke Statistics (45-002, \$2.50/\$25).

THESE PUBLICATIONS RELEASED SEPTEMBER 3 — 9

| | Cata- logue No. | In Canada: Price per issue/year | Elsewhere: Price per issue/year |
|---|-----------------------|---------------------------------------|---------------------------------------|
| AGRICULTURE STATISTICS | | | |
| Field Crop Reporting Series: No. 6, August Forecast of Production of Principal Field Crops, Canada | 22-002 | \$10 for Series | \$12 for Series |
| BUSINESS FINANCE | | | |
| Industrial Corporations, Financial Statistics (Preliminary Data), Second Quarter 1982 | 61-003p | N/C | N/C |
| Industrial Corporations, Financial Statistics, First Quarter 1982 | 61-003 | \$10/\$40 | \$12/\$48 |
| CANSIM | | | |
| Canadian Statistical Review, August 1982 | 11-003E | \$3.50/\$35 | \$4.20/\$42 |
| CENSUS | | | |
| Private Households: Type, Number of Persons, Composition, 1981 Census of Canada | 92-904 | \$5.50 | \$6.60 |
| DEMOGRAPHY | | | |
| Quarterly Estimates of Population for Canada and the Provinces, April 1982 | 91-001 | \$2.50/\$10 | \$3/\$12 |
| EXTERNAL TRADE | | | |
| Exports by Countries, January-June 1982 | 65-003 | \$10/\$40 | \$12/\$48 |
| MANUFACTURING AND PRIMARY INDUSTRIES | | | |
| Asphalt Roofing, July 1982 | 45-001 | \$1.50/\$15 | \$1.80/\$18 |
| Corrugated Boxes and Wrappers, July 1982 | 36-004 | \$1.50/\$15 | \$1.80/\$18 |
| Crude Petroleum and Natural Gas Production, May 1982 | 26-006 | \$2.50/\$25 | \$3/\$30 |
| Domestic Washing Machines and Clothes Dryers, July 1982 | 43-002 | \$1.50/\$15 | \$1.80/\$18 |
| Electric Lamps (Light Sources), July 1982 | 43-009 | \$1.50/\$15 | \$1.80/\$18 |
| Footwear Statistics, July 1982 | 33-002 | \$1.50/\$15 | \$1.80/\$18 |
| Fruit and Vegetable Processing Industries 1980 | 32-218 | \$4.50 | \$5.40 |
| Mineral Wool Including Fibrous Glass Insulation, July 1982 | 44-004 | \$1.50/\$15 | \$1.80/\$18 |
| Production, Shipments and Stocks on Hand of Sawmills in British Columbia, June 1982 | 35-003 | \$2.50/\$25 | \$3/\$30 |
| Rigid Insulating Board, July 1982 | 36-002 | \$1.50/\$15 | \$1.80/\$18 |
| Sash, Door and Other Millwork Plants, 1980 | 35-205 | \$4.50 | \$5.40 |
| SERVICE BULLETIN | | | |
| Fruit and Vegetable Preservation , Vol. 11, No. 1, Pack of Processed Asparagus, 1982 | 32-023 | \$1.50/\$15 | \$1.80/\$18 |
| MERCHANDISING AND SERVICES | | | |
| Department Store Sales by Regions, July 1982 | 63-004 | \$1.50/\$15 | \$1.80/\$18 |
| New Motor Vehicle Sales, June 1982 | 63-007 | \$2.50/\$25 | \$3/\$30 |
| Wholesale Trade, June 1982 | 63-008 | \$1.50/\$15 | \$1.80/\$18 |
| PRICES | | | |
| Consumer Prices and Price Indexes, April-June 1982 | 62-010 | \$6/\$24 | \$7.20/\$28.80 |
| TRANSPORTATION AND COMMUNICATIONS | | | |
| Radio and Television Broadcasting, 1981 | 56-204 | \$6 | \$7.20 |
| Railway Operating Statistics, January 1982 | 52-003 | \$2.50/\$25 | \$3/\$30 |
| SERVICE BULLETIN | | | |
| Aviation Statistics Centre , Vol. 14, No. 8, Canadian Air Transport Industry, Summary Statistics | 51-004 | \$1.50/\$15 | \$1.80/\$18 |