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Weekly Bulletin

September 17, 1982

Canadian Leading Indicator

The rate of decline of the Canadian Composite Leading Indicator was little changed in June 1982 (-1.59%) from May, as the index level fell from 112.28 to 110.49. The decline in the non-filtered version accelerated with the indicator dropping 1.6% from 109.6 to 107.8, after a 0.99% decline in May. These signs do not support more than a low probability for economic growth in the third quarter, as a strengthening of the external sector is unlikely to offset languishing household and business demand. It is interesting to note that six of the 10 components were up in the non-filtered version but despite the increasing number of positive indicators in June, the rate of descent of the non-filtered version accelerated. The concentration of the weakness of economic activity was reflected in the steep declines recorded for depressed sectors of the economy, notably housing and financial markets.

The indicators of personal expenditure on goods remained negative in June, as the brief signs of a firming of household demand early in the second quarter have practically vanished. The drop in sales of furniture and appliances accelerated (-1.63%), which is in part attributable to the slump of the housing market in the second quarter. In the non-filtered version, this component has declined 35.0% from the peak in June 1981. The drop in new motor vehicle sales slowed to only 0.36% in June, but the drastic fall in sales in July in the non-filtered version (-27.0%, after a 6.3% increase in June) indicates that a turnaround from this downward trend is unlikely in the near-term. In fact, increased layoffs during August in these sectors of activity strongly suggest that the renewed weakness in demand will generate further declines in production in these industries in the third quarter. The accelerating drop of total employment and the considerable weakening of wage rates in the second quarter have caused the renewed downward course of household demand.

The outlook for the housing market was once again quite negative in June, as the residential construction index continued to decline at a rapid rate (-8.02%).

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

LATEST MONTHLY STATISTICS

EMPLOYMENT, INCOME

Average Weekly Earnings (\$)	June*	389.57p	387.25p	9.3
Labour Income (\$ million)	June	16,922.3p	16,523.1p	4.9
Persons with Jobs (million)	Aug.*	10.91	11.00	-5.0
Unemployed	Aug.*	1,388,000	1,386,000	75.7

INVENTORIES

Department Store (\$ million)	July*	3,006.6	2,909.1	-1.1
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	26.2	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

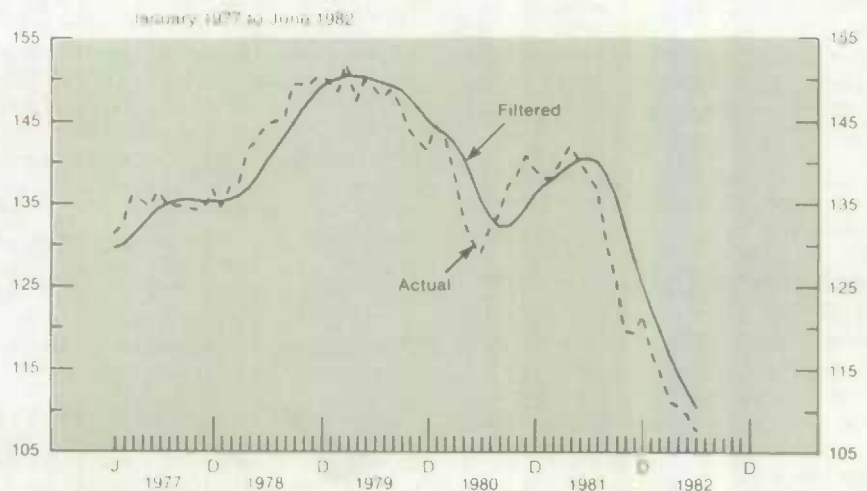
SALES

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)	July*	679.4	6,056.9	-19.5
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)

Canada

Labour Force Survey

Canada's seasonally adjusted unemployment rate rose to another record high in August 1982, moving to 12.2% from the previous peak of 11.8% in July. The participation rate decreased to 64.2% from 64.5% in the preceding month and the employment/population ratio dropped to 56.4% from 56.9%.

For the week ending August 21, 1982, the seasonally adjusted level of employment was 10,494,000, down a substantial 83,000 from July, and the twelfth consecutive decline since the peak reached in August 1981. In the latest month, employment declined among males 25 and over (-44,000), males 15 to 24 (-35,000) and females 15 to 24 (-19,000), while the employment level for females 25 and over increased by 15,000. The decreases in employment were concentrated in trade (-48,000) and manufacturing (-28,000). On a provincial basis, employment was down in Ontario (-38,000), Quebec (-21,000), Newfoundland (-5,000), New Brunswick (-4,000), Manitoba (-5,000) and Saskatchewan (-4,000).

Seasonally adjusted, unemployment was estimated at 1,456,000 in August, up 43,000 over July. The increase was concentrated in the 25 years of age and over group (+40,000 for males and +14,000 for females). By province, unemployment rose in Ontario (+29,000), Quebec (+18,000) and Manitoba (+7,000), while showing little change in the other provinces.

Seasonally adjusted unemployment rates for the provinces in August were as follows, with July rates in brackets: Newfoundland, 17.7% (16.6%); Prince Edward Island, 14.2% (13.1%); Nova Scotia, 13.1% (13.9%); New Brunswick, 14.1% (14.2%); Quebec, 15.9% (15.2%); Ontario, 10.8% (10.1%); Manitoba, 9.3% (7.9%); Saskatchewan, 6.8% (6.5%); Alberta, 8.3% (8.0%); and British Columbia, 13.9% (13.8%).

The unadjusted employment level for Canada was estimated at 10,907,000 in August 1982, down 573,000 (-5.0%) from a year earlier. Unemployment climbed 75.7% to 1,388,000 from 790,000 over the 12-month period. The unemployment rate at 11.3% was up from 6.4% in August 1981. The participation rate declined to 66.1% from 66.9% and the employment/population ratio fell to 58.6% from 62.6%.

For further information, order the August 1982 issue of *The Labour Force* (71-001, \$3.50/\$35).

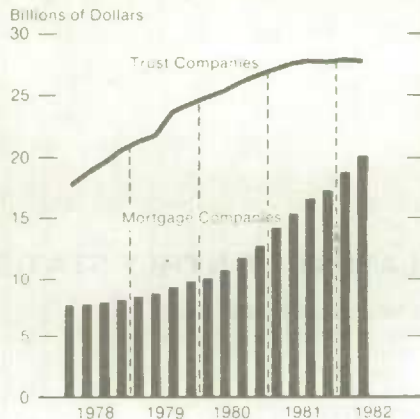
Telephone Statistics

Canada's 13 major telephone systems reported revenues of \$634.2 million in July 1982, up 9.5% from a year earlier. Operating expenses increased 11.7% to \$454.1 million. Net operating revenue at \$180.1 million showed an increase of 4.1% over July 1981.

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

Trust and Mortgage Companies

Quarterly Statements of Mortgages Outstanding



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

New Motor Vehicle Sales

Despite high domestic sales of passenger cars initially destined for Iraq by General Motors, Canadian sales of new motor vehicles slid back in July to the low level recorded at the beginning of 1982. New motor vehicle sales totalled 65,076 units, down 32.9% from a year earlier. This included 34,850 passenger cars (down 31.2%) and 10,732 commercial vehicles (down 45.8%) manufactured in North America, and 16,731 passenger cars (down 29.6%) and 2,763 commercial vehicles (up 0.4%) manufactured overseas. Sales of North American manufactured commercial vehicles were at their lowest level since August 1971.

Of all new passenger cars sold in Canada in July 1982, 67.6% were manufactured in North America, 25.0% in Japan and 7.4% in Europe, while for the same month last year the percentages were 68.1%, 26.6% and 5.3%, respectively.

Total sales value decreased 29.8% from a year earlier to \$679.4 million in July 1982. North American passenger car sales were \$339.7 million (down 28.0%) and commercial vehicle sales \$154.2 million (down 41.0%). Sales of passenger cars from overseas decreased 23.4% to \$160.7 million, while those of commercial vehicles increased by 3.1% to \$24.8 million. Included in total commercial vehicles sold were 438 coaches and buses valued at \$14.0 million (up 42.5% over last year).

For the first seven months of 1982, total sales of new motor vehicles in Canada were 564,279 units (764,463 in 1981), with an accumulated value of \$6,056.9 million. This represents a decrease of 19.5% in value from sales for January to July 1981.

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

Retail Trade

Total retail trade was \$8,388.4 million in July 1982, an increase of 3.4% over July 1981. Sales rose in 22 of the 28 trade groups with the largest increases posted for pharmacies, patent medicine and cosmetics stores (+19.9%), florists (+18.6%) and grocery, confectionery and sundries stores (+17.4%). The largest sales decreases were recorded by motor vehicle dealers (-19.2%) and household furniture stores (-7.6%). Sales increased in all provinces except Alberta (-3.5%) and British Columbia (-2.6%) with the most notable gains in Nova Scotia (+9.3%) and Newfoundland (+8.6%).

Revised total retail trade for June 1982 was \$8,421.5 million, up 1.9% from June 1981.

Cumulative sales for January to July 1982 were \$53,896.2 million, an increase of 2.7% over the same period last year.

Seasonally adjusted, retail sales in July 1982 were at a level of \$8,095.4 million, up 1.8% from \$7,948.5 million in June 1982. Florists (+13.0%), household appliance stores (+5.4%) and family clothing stores (+4.4%) had the largest increases while motor vehicle dealers (-5.2%) and garages (-3.7%) showed the biggest drops. Five provinces had increased sales from June, advances ranging from 3.6% for Ontario to 0.5% for New Brunswick.

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

Department Store Sales

Department store sales totalled \$764.0 million in July 1982, an increase of 0.8% from July 1981. Sales increased in 23 of the 40 departments with furs (+26.9%) and plumbing, heating and building materials (+20.1%) registering the largest sales increases. The most notable decreases were in draperies, curtains and furniture coverings (-10.7%) and lamps, pictures, mirrors and all other home furnishings (-10.4%). Sales increased in all provinces except Quebec (-1.0%), Alberta (-2.4%) and British Columbia (-5.4%) with the largest increases in New Brunswick (+14.0%) and Prince Edward Island (+13.6%). Among the 10 metropolitan areas for which data are collected, the largest sales increase was recorded in Ottawa-Hull (+8.4%) while the largest decrease was in Vancouver (-6.7%).

Sales of major department store organizations in July were \$477.6 million, down 1.7% from a year earlier, while junior department store organizations had sales of \$286.4 million, up 5.3% from July 1981.

The selling value of stocks held in July 1982 at \$3,006.6 million showed a decrease of 1.1% from July 1981.

For further information, order the July 1982 issue of *Department Store Sales and Stocks* (63-002, \$3/\$30).

Foreign Trade/Automotive

Canada had a record first half 1982 surplus of \$1.1 billion in the balance in trade on automotive products with the United States; this compared with a \$1.6 billion deficit recorded for the corresponding period of the previous year. The dramatic turnaround reflected a \$2.9 billion jump in the surplus on vehicles (cars, trucks and other motor vehicles) which was somewhat offset by a \$250 million rise in the deficit on parts. Exports were up 40%, while imports were down 3% despite a 13% increase in parts imports.

The \$360 million automotive trade deficit with overseas countries was up marginally from the previous year (\$335 million) as exports declined more rapidly (16%) than imports (9%).

For further information, contact Gordon Blaney (613-995-6305), Trade Inquiries Unit, Pierre Pichette or François Bordé (613-995-6116), Trade Measures and Analysis Section, External Trade Division, Statistics Canada, Ottawa K1A 0Z9.

Restaurant Statistics

Preliminary estimates for July 1982 show that restaurants, caterers and taverns in Canada had sales totalling \$909.7 million. Final estimates for June 1982 indicate total sales of \$865.2 million.

For further information on sales of chains versus independents and provincial sales by kind of business, order the July 1982 issue of *Restaurant, Caterer and Tavern Statistics* (63-011, \$1.50/\$15), or contact R. Bennett (613-995-2301), Services Section, Merchandising and Services Division, Statistics Canada, Ottawa K1A 0T6.

Local Government

Municipalities across Canada employed an estimated 303,875 persons in general government services at the end of June 1982, an increase of 8.0% from the 281,428 reported at the end of the previous quarter.

Gross payrolls of municipalities for the second quarter of 1982 amounted to \$1,505,695,000, up 12.1% from the \$1,342,807,000 reported for the first quarter of the year.

Data are presently available from matrix 2725 and 2726 of the CANSIM data bank and from the April-June issue of *Local Government Employment* (72-009, \$4/\$16), or contact the Local Government Section (613-995-9897), Public Finance Division, Statistics Canada, Ottawa K1A 0T6.

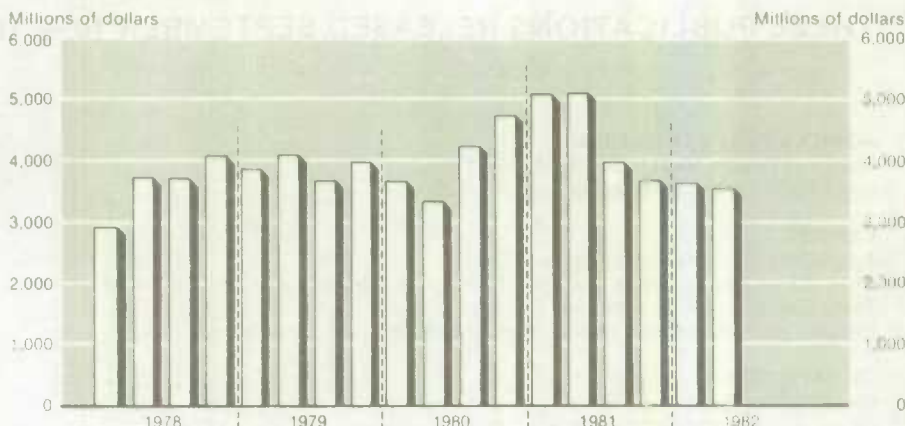
Raw Steel Production

Preliminary estimates show Canadian production of steel ingots rose to 926 174 tonnes in August 1982 from 696 135 tonnes a year earlier.

For further information, order the August 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.

Accrued Net Income of Farm Operators from Farm Production

Data Seasonally Adjusted at Annual Rates



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

Farm Cash Receipts

Farm cash receipts for the January-July 1982 period totalled an estimated \$10,618.3 million, down 4% from the year-earlier level of \$11,104.4 million.

Receipts from the sale of field crops fell 12% to \$5,025.1 million in the latest period. The decline primarily reflected lower Canadian Wheat Board payments (\$568 million compared with \$1,243 million in 1981) and lower initial prices for wheat. Grain volumes continue to increase though, and are now 32% higher than in 1981 for barley and 9% higher for wheat.

Deferred grain receipts liquidated in 1982 partly offset the decline in wheat board payments.

Cash receipts from the sale of livestock and livestock products rose 3% from the January-July 1981 level. Higher hog and dairy product prices (and consequently receipts) offset decreases in cattle and poultry receipts.

For further information, order the January-July 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.

Employment/Earnings

First estimates show the Canada industrial composite index of employment declined 0.7% from May to June 1982. Lower employment levels were recorded in all industry divisions except trade and construction which showed small increases; all regions contributed to the overall employment decrease.

Average weekly earnings at the Canada industrial level advanced 0.3% to \$387.25 in June from \$386.09 in May. Weekly earnings were higher in mining (including milling), manufacturing, construction and finance, insurance and real estate, but decreased in the other industry divisions. All regions contributed to the overall increase except Quebec.

Average weekly hours worked increased

in manufacturing and construction but decreased in mining (including milling). Average hourly earnings were higher in all three industry divisions.

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

Canada's Population

Canada's population at July 1, 1982 totalled an estimated 24,625,000 persons.

Population figures for the provinces and territories were as follows:

- Ontario, 8,706,500
- Quebec, 6,472,700
- British Columbia, 2,785,900
- Alberta, 2,320,100
- Manitoba, 1,036,800
- Saskatchewan, 982,500
- Nova Scotia, 853,700
- New Brunswick, 701,800
- Newfoundland, 571,700
- Prince Edward Island, 122,900
- Northwest Territories, 46,700
- Yukon, 23,700

For information concerning data, contact Lise Ofori-Atiah (613-995-2212), Demography Division, Statistics Canada, Ottawa K1A 0T6.

Local Government Finance

Total general revenue raised by local governments in Canada reached \$24,614 million in 1979. Own-source revenues — real property and other taxes, sales of goods and services, licences, permits and other charges — amounted to \$12,077 million or 49.1% of total general revenue.

General expenditure of local governments totalled \$24,551 million in 1979.

Further details of these and other financial management statistics of local governments will be published in *Local Government Finance Actual, 1979* (68-204).



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THESE PUBLICATIONS RELEASED SEPTEMBER 10 — 16

	Cata- logue No.	In Canada: Price per issue/year	Elsewhere: Price per issue/year
AGRICULTURE STATISTICS			
Stocks of Frozen Meat Products, August 1982	32-012	\$2.50/\$25	\$3/\$30
Stocks of Fruit and Vegetables, August 1, 1982	32-010	\$1.50/\$15	\$1.80/\$18
CENSUS			
Agriculture: Canada, 1981 Census of Canada	96-901	\$9.50	\$11.40
Census Families in Private Households: Persons, Children at Home, Structure and Type, Living Arrangements, 1981 Census of Canada	92-905	\$7.50	\$9
Population: Age, Sex and Marital Status, 1981 Census of Canada	92-901	\$8.50	\$10.20
CONSTRUCTION			
Building Permits, June 1982	64-001	\$3.50/\$35	\$4.20/\$42
Housing Starts and Completions, June 1982	64-002	\$3/\$30	\$3.60/\$36
EDUCATION, SCIENCE AND CULTURE			
SERVICE BULLETIN			
Science Statistics, Vol. 6, No. 10, The Regional Distribution of R&D in Canada, 1977 to 1980	13-003	\$1.50/\$15	\$1.80/\$18
EXTERNAL TRADE			
Imports by Commodities, June 1982	65-007	\$5/\$50	\$6/\$60
FINANCIAL FLOWS AND MULTINATIONAL ENTERPRISES			
Travel Between Canada and Other Countries, April-June 1982	66-001	\$7.50/\$30	\$9/\$36
MANUFACTURING AND PRIMARY INDUSTRIES			
Capacity Utilization Rates in Canadian Manufacturing, Second Quarter 1982	31-003	\$5/\$20	\$6/\$24
Cement, July 1982	44-001	\$1.50/\$15	\$1.80/\$18
Domestic Refrigerators and Freezers, July 1982	43-001	\$1.50/\$15	\$1.80/\$18
Gypsum Products, July 1982	44-003	\$1.50/\$15	\$1.80/\$18
Industrial Chemicals and Synthetic Resins, July 1982	46-002	\$1.50/\$15	\$1.80/\$18
Inventories, Shipments and Orders in Manufacturing Industries, June 1982	31-001	\$3.50/\$35	\$4.20/\$42
Oils and Fats, July 1982	32-006	\$1.50/\$15	\$1.80/\$18
Production and Sales of Phonograph Records and Pre-recorded Tapes in Canada, July 1982	47-004	\$1.50/\$15	\$1.80/\$18
Quarterly Shipments of Office Furniture Products, Quarter Ending June 30, 1982	35-006	\$2.50/\$10	\$3/\$12
Specified Domestic Electrical Appliances, July 1982	43-003	\$1.50/\$15	\$1.80/\$18
Steel Wire and Specified Wire Products, July 1982	41-006	\$1.50/\$15	\$1.80/\$18
MERCHANDISING AND SERVICES			
Department Store Sales and Stocks, June 1982	63-002	\$3/\$30	\$3.60/\$36
Merchandising Inventories, June 1982	63-014	\$2.50/\$25	\$3/\$30
PUBLIC FINANCE			
The Control and Sale of Alcoholic Beverages in Canada, 1980	63-202	\$4.50	\$5.40
TRANSPORTATION AND COMMUNICATIONS			
For-hire Trucking Survey, 1980	53-224	\$6	\$7.20
Railway Freight Traffic, Year Ending December 31, 1980	52-205	\$10	\$12
SERVICE BULLETINS			
Railway Transport, Vol. 12, No. 4, Railway Carloadings, May 1982; Railway Carloadings, June 1982; Railway Operating Statistics, January 1982; Railway Operating Statistics, February 1982	52-004	\$1.50/\$15	\$1.80/\$18
Water Transport, Vol. 12, No. 7, Cargo Loaded and Unloaded in Coastwise Shipping by Vessels of Foreign Registries, April-June 1982 and 1981	54-003	\$1.50/\$15	\$1.80/\$18