

January 21, 1983

Retail Trade

Retail sales in Canada without seasonal adjustment totalled \$8,536.7 million in November 1982, up 4.1% from a year earlier. Sales advanced in 21 of the 28 groups with the largest increases for automotive parts and accessories stores (+24.1%), used car dealers (+21.3%) and pharmacies, patent medicine and cosmetics stores (+21.2%). The largest sales decreases were reported for motor vehicle dealers (-16.6%), jewellery stores (-8.7%) and book and stationery stores (-7.2%).

Retail sales in the latest month showed increases from November 1981 in all provinces except British Columbia (-2.6%), Alberta (-0.4%) and the Yukon and Northwest Territories (-7.1%), gains ranging from 3.7% in Saskatchewan to 12.3% in New Brunswick. In metropolitan areas, sales were higher in Winnipeg (+8.0%), Montreal (+5.5%) and Toronto (+0.3%) but dropped in Vancouver (-3.1%).

Revised total retail trade for October 1982 was \$8,273.9 million, an increase of 0.2% over October 1981.

Cumulative sales for January to November 1982 were \$86,762.4 million, up 2.8% over the same period in 1981.

Seasonally adjusted, retail sales for November 1982 were up 2.7% from the preceding month to a level of \$8,249.6 million.

For further information, order the November 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 0T6.

Help-wanted Index

The seasonally adjusted help-wanted index (1969=100) plunged in the fourth quarter of 1982 to 69, the lowest level since 1963. The index was down by 7% from the previous quarter and by a substantial 66% from the same quarter in 1981.

The annual index for 1982 dropped to 99, down 56% from 1981 and the index now stands at pre-1972 annual levels. Decreases were posted in 1982 in all regions, ranging from 35% in the Atlantic provinces to 65% in British Columbia.

Inquiries about the Index should be directed to Horst Stiebert (613-995-8445), Labour Division, Statistics Canada, Ottawa K1A 0V1.

LATEST MONTHLY STATISTICS

EMPLOYMENT, INCOME

Average Weekly Earnings (\$)	Sept.	393.26p	392.02p	7.0
Labour Income (\$ million)	Sept.	16,880.7p	16,401.0p	2.2
Persons with Jobs (million)	Dec.	10.25	10.36	-3.8
Unemployed	Dec.	1,494,000	1,438,000	51.4

INVENTORIES

Department Store (\$ million)	Nov.	3,324.7	3,338.1	-3.3
Manufacturers' Owned (\$ million)	Oct.	32,105.2p	32,533.4r	-2.1

ORDERS

Manufacturers' New Orders (\$ million)	Oct.	14,984.3p	15,773.3r	-8.3
Manufacturers' Unfilled Orders (\$ million)	Oct.	16,856.6p	17,129.0r	-14.6

PRICES

Consumer Price Index (1971=100)	Nov.	271.0	269.2	9.8
New House Price Index (1976=100)	Nov.	129.7	130.2	-3.4
Raw Materials Price Index (1977=100)	Nov.	200.9p	200.9p	4.0
Excl. coal, crude oil, nat. gas	Nov.	142.9p	143.9p	-3.4
Industry Selling Price Index (1971=100)	Nov.	291.0p	292.0p	-1.4

CONSTRUCTION

Building Permits (\$ million)	Oct.	977.0p	10,381.3p	-31.0
Housing Starts — Urban Centres (units)	Nov.	11,208	94,294	-26.5

ENERGY

Coal Production (thousand tonnes)	Oct.	2,970	35,327	8.5
Electricity Generation (terawatt hours)	Oct.	30.5	307.3	-0.6
Natural Gas Production (million cubic metres)	Sept.	6,866.7	71,850.8	1.2
Petroleum Refining (million cubic metres)	Nov.	7.8p	82.7p	-13.0

FOREIGN TRADE

Exports — Balance of Payments Basis (\$ million)	Nov.	7,028p	77,351p	0.1
Imports — Balance of Payments Basis (\$ million)	Nov.	5,262p	61,682p	-13.9

PRODUCTION

Railway Carloadings (million tonnes)	Dec.	14.5p	200.9p	-12.6
Steel (ingots — thousand tonnes)	Dec.	618.3p	11,769.0p	-19.6

SALES

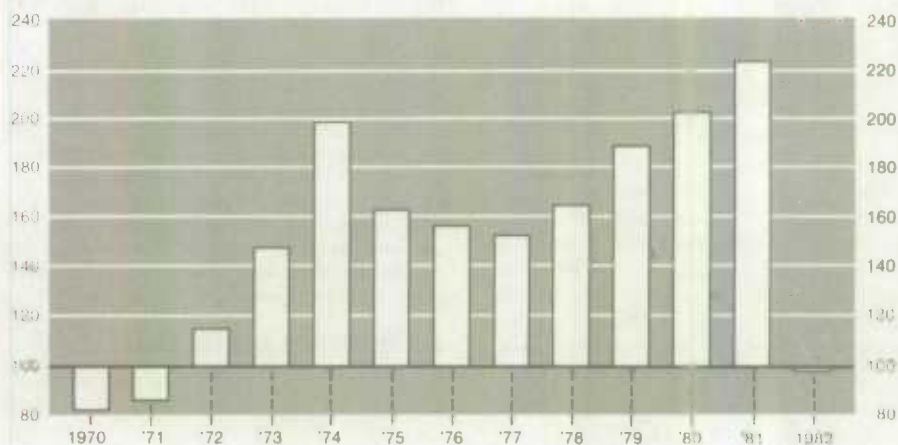
Department Store Sales (\$ million)	Nov.	1,073.6	8,598.0	-0.9
Manufacturers' Shipments (\$ million)	Oct.	15,256.7p	153,373.6p	-3.3
New Motor Vehicle Sales (\$ million)	Nov.	765.2	9,094.5	-19.0
Retail Sales (\$ million)	Nov.	8,536.7p	86,762.4p	2.8

Statistics are in current dollars and are not seasonally adjusted.

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

Help-wanted Index, Canada

(1969=100)



Source: Statistics Canada, Daily Bulletin (11-001E)

Second-language Programs

In the 1981-82 school year, some 1.6 million elementary and secondary students in the nine provinces outside Quebec were enrolled in second-language French programs. Of these, more than 42,000 were in immersion programs where French was the language of instruction for an average of 85% of the school week.

Participation in second-language French has increased consistently over the past 10 years, to 48% from 40%. This increase resulted from substantial gains at the elementary level (to 51% from 31%), while participation for secondary students declined (to 42% from 56%). It should be noted, however, that the declines in secondary school participation over the decade occurred in the early 1970s; in recent years the rate has stabilized at around 42%.

*For more information on language programs in Canadian schools, order the publication **Minority and Second Language Education, Elementary and Secondary Levels, 1981-82** (81-257, \$6), or contact Jim Seidle (613-995-9795).*

Expenditures on Culture

Canada's federal government spent a total of \$1,092.2 million on culture during 1980-81, an increase of 11.3% over 1979-80. (Discounting inflation, however, expenditures decreased by 1.7% over the period.) Spending on culture represented about 1.8% of total federal expenditures for the 1980-81 fiscal year, little changed from the preceding year.

*For further information, order **Government Expenditures on Culture in Canada, 1979-80 and 1980-81** (catalogue 87-680, \$4.50), or contact N. Verma (613-593-6862).*

School Enrolment

In the 1981-82 school year, slightly more than 5,000,000 students were enrolled in elementary or secondary schools in Canada. About 95% of these students attended public schools. However, private school enrolments have grown steadily over the past 10 years, to 220,000 in 1981-82 from 140,000 in 1971-72, an increase of nearly 60%. Over the same period, public school enrolment dropped 15%, or nearly 900,000 students.

Kindergarten enrolment in public schools decreased by 7,500 in 1981-82, the first decline since 1977-78; this was in contrast to a total increase of nearly 16,000 between 1977-78 and 1980-81. Over the past 10 years, enrolment in Grades 1 to 6 fell by more than 20% (600,000 students); however, during the past two years, the decline has stabilized at 20,000 per year. Enrolment in Grades 7 to 13 decreased by more than 300,000 students (13%) over the same 10-year period; as at the elementary level, the decline has remained relatively stable at about 3% per year since 1979-80.

*For additional information on elementary-secondary enrolments in Canadian schools, order **Elementary-secondary School Enrolment, 1981-82** (catalogue 81-210).*

Publications

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Farm Cash Receipts

Farm cash receipts for the January-November 1982 period totalled an estimated \$16,922.4 million, down 1.9% from the year-earlier total of \$17,242.6 million.

Receipts from the sale of field crops declined 6% in the latest period to \$7,815.8 million. This decline is primarily due to smaller Canadian Wheat Board payments (\$568 million paid in 1982 compared with \$1,243 million in 1981) and lower initial prices for wheat; partly offsetting were deferred grain receipts liquidated in 1982. Despite the decrease in the level of wheat board payments and initial prices, grain volumes are now 12% higher than in 1981 for barley and 16% higher for wheat.

Cash receipts from the sale of livestock and livestock products in the latest period were up 6% from the January-November 1981 level. Higher hog and dairy prices (and consequently receipts) offset decreases in cattle and poultry receipts.

*For further information, order the January-November 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.*

Farm Products Prices

The Canada index number of farm prices of agricultural products (1971=100) fell 1.2% to 281.3 in November 1982 from the October index of 284.6 but was still up 0.3% from the year-earlier level of 280.4.

*The index, which measures — as closely as can be determined — prices received by producers at the farm gate, is available on CAN-SIM (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 Phil Jensen (613-995-4895), Farm Income and Prices Section, Agriculture Statistics Division, Statistics Canada, Ottawa K1A 0T6.*

Restaurant Statistics

Preliminary estimates for November 1982 show that restaurants, caterers and taverns in Canada had sales totalling \$769.6 million. Final estimates for October 1982 indicate total sales of \$823.8 million.

Industrial Corporations

Based on final survey results for the third quarter of 1982, after-tax profits of Canadian industrial corporations fell 51.2% from levels registered a year earlier: the third quarter figure was \$2.0 billion, down from \$4.1 billion in the year-earlier period, and \$5.2 billion in the second quarter of 1981, just before the recession began.

Seasonally adjusted data show a more optimistic current situation: quarter-to-quarter after-tax profits dropped 5.0% during the third quarter, following a decrease of 17.9% in the second quarter. Profits before taxes and extraordinary items actually increased 7.8% from the preceding quarter, the first upward movement since the recession began. The different changes in before-and after-tax profits are largely caused by corporations with loss positions in the third quarter not showing income tax recoveries on their income statements, thus lowering the after-tax profit.

Third quarter results are now available on balance sheet data for corporations with assets of more than \$10 million. These show that despite corporations paying out to shareholders greater proportions of net earnings, declining profits have forced corporations to cut back dividend levels to \$1.3 billion in the latest quarter from \$1.9 billion a year earlier. The proportion of profits paid out in cash dividends during this period rose to 91% from 62%.

According to balance sheet data, corporations may be expected to borrow significantly more just to meet their current liabilities on long term debt payable. These liabilities have risen from \$2.5 billion at the third quarter 1981 to \$4.8 billion currently.

As may be expected, the return on shareholders' equity in the third quarter of 1982 is running well below last year's rate of 10.3%. The current quarter's annualized return on equity is 4.6%.

For further information, contact Tom Maxwell or Bill Potter (613-995-9751), Business Finance Division, Statistics Canada.

University Enrolment

Preliminary data show that full-time enrolment in Canadian universities increased about 6.5% (25,850) in 1982-83 to some 428,800 students. Provinces which showed the most notable increases in enrolment were Newfoundland (+15%), Prince Edward Island (+14.5%) and Manitoba and Saskatchewan (+11.5%) with the other provinces recording gains ranging from 4% to 10%.

Part-time enrolment rose by about 2% (4,600) to 258,100 students in 1982-83. The highest percentage increases were registered in Newfoundland (+15.5%), Manitoba (+10%) and Saskatchewan (+8%). Increases in the other provinces were marginal, while Prince Edward Island recorded a decline (-7%).

For further information, contact M. Moueithi or D. Lynd (613-995-1105), Postsecondary Education Section, Education, Science and Culture Division.

Manufacturing Industries

Preliminary estimates show the value of new orders received in all Canadian manufacturing industries in November 1982, seasonally adjusted, increased 7.4% to \$15,488.4 million from the revised level of \$14,427.5 million in October. In durable goods industries, new orders with an estimated value of \$6,574.1 million were up sharply, showing an 18.2% advance over the revised October value of \$5,561.8 million. Most of the increase was the result of an order for mass transit equipment; this, in combination with lesser increases in other industries that manufacture transportation equipment boosted the value of orders received by establishments classified to that group by \$917.9 million or 58.5%. In non-durable goods industries, new orders rose 0.5% to \$8,914.3 million from \$8,865.7 million.

The seasonally adjusted preliminary estimate of the value of Canadian manufacturers' shipments in November was \$14,783.3 million, up 1.1% from October's revised \$14,620.3 million. Shipments of durable goods industries increased 1.2% to \$5,822.6 million from \$5,751.1 million in October, while those in non-durable goods industries were up 1.0% to \$8,960.7 million from \$8,869.2 million.

The unfilled orders backlog at the end of November was \$17,859.8 million, seasonally adjusted, an increase of 4.1% from the revised October estimate of \$17,154.7 million. Unfilled orders in durable goods industries were up 5.0% to \$15,671.3 million from \$14,919.8 million at the end of October, but those in non-durable goods industries declined 2.1% to \$2,188.5 million from \$2,234.9 million a month earlier.

Inventory owned by manufacturers at the end of November was a seasonally adjusted \$32,450.3 million, down 1.0% from the preceding month's revised value of \$32,791.7 million.

The seasonally adjusted ratio of total inventory owned to shipments at the end of November was 2.20:1, down from 2.24:1 in October. The ratio of finished products to shipments declined to 0.77:1 from 0.79:1.

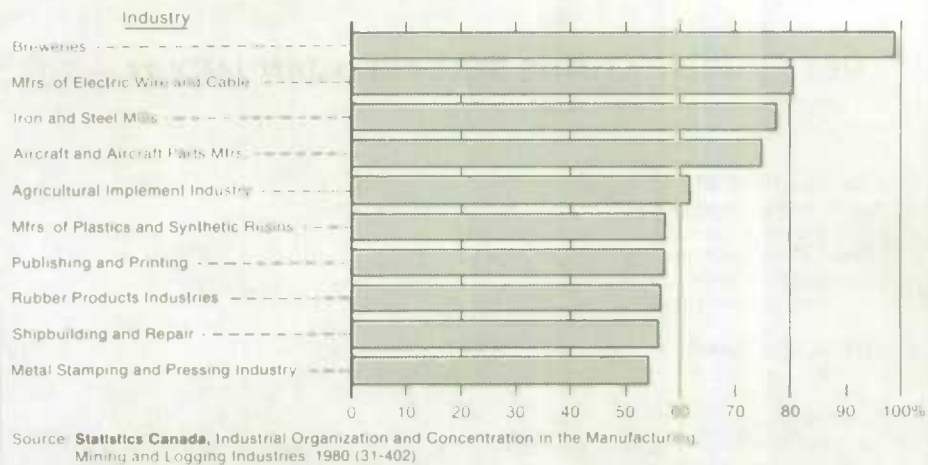
Not adjusted for seasonal variation, manufacturers' shipments in November 1982 were estimated at \$15,232.6 million. Cumulative shipments for the first 11 months of 1982 at an estimated \$168,542.3 million were down 3.4% from the January-November 1981 total of \$174,389.7 million.

For further information, order the November 1982 issue of *Inventories, Shipments and Orders in Manufacturing Industries* (31-001, \$3.50/\$35). For further information, contact H.D. Wightman (613-996-7008).

Refined Petroleum Products

Preliminary data show net sales in Canada of all refined petroleum products amounted to 7 022.4 thousand cubic metres in November 1982, a drop of 8.5% from 7 679.3 thousand cubic metres a year earlier.

Percentage of Value of Shipments of Goods of Own Manufacture Accounted for by Leading 4 Enterprises in Selected Canadian Industries, 1980



Industrial Concentration

The level of industrial concentration increased in 67 manufacturing industries in Canada between 1978 and 1980 but declined in 99, as measured by the percentage of shipments accounted for by the four largest enterprises in each industry (known as the "top four concentration ratio"). In three industries there were no changes in the ratio (rounded to one decimal place). The median top four concentration ratio in 1980 was 47.4%, compared with 47.7% in 1978.

Data users should note that an enterprise is a group of companies under common control. The concentration ratio is a measure of the market share of the largest enterprises in each industry and is often used as one indicator of the degree of competition in an industry.

For further information, contact Ken Young (613-992-9654), Manufacturing and Primary Industries Division, Statistics Canada, Ottawa K1A 0T6. Complete data will be published later in *Industrial Organization and Concentration in the Manufacturing, Mining and Logging Industries, 1980* (31-402).

Department Store Sales

Department store sales were \$1,073.6 million in November 1982, up 3.6% from November 1981. Sales were up in 28 of the 40 departments with the largest gains recorded in furs (+30.6%), repairs and services (+24.5%) and women's and girls' hosiery (+22.0%). The largest decreases were posted in jewellery (-16.3%), china and glassware (-10.2%) and piece goods (-10.1%). Sales were up from a year earlier in all the provinces with the exception of British Columbia (-1.8%) and the Yukon and Northwest Territories (-1.0%). The most notable sales increases were reported in Saskatchewan (+13.9%), Prince Edward Island (+12.3%) and Nova Scotia (+11.2%). For the 10 metropolitan areas covered by this survey, the largest sales increase was in Halifax-Dartmouth (+15.7%), while the biggest drop occurred in Vancouver

(-4.2%).

Sales of major department store organizations in November 1982 totalled \$708.6 million, up 3.3% from November 1981, while junior department store organizations had sales of \$364.9 million, up 4.1% from a year earlier.

The selling value of stocks held in November 1982 at \$3,324.7 million showed a decrease of 3.3% from November 1981.

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

Security Transactions

Transactions with non-residents in outstanding Canadian securities produced a net outflow of capital from Canada of \$113 million in November 1982, down from a \$199 million net outflow recorded in October.

Non-residents reduced their holdings of outstanding Canadian bonds by a further \$103 million in November, bringing to nearly \$600 million the net reduction in the latest four months. The November decline was more than accounted for by net selling by residents of Japan and the United Kingdom. A net outflow of \$10 million was also recorded from trading in outstanding Canadian equities, a shift from a \$38 million net inflow in October.

Residents of Canada increased their portfolio holdings of foreign securities during the current month, resulting in a net capital outflow of \$62 million, the same as was recorded in the previous month. Residents increased their holdings of foreign equities by \$70 million during November, nearly twice the increase posted in October. These purchases continue to be United States equities.

For further information, order the November 1982 issue of *Security Transactions with Non-residents* (67-002, \$2.50/\$25), or contact Don Granger (613-996-2545), Balance of Payments Division, Statistics Canada, Ottawa K1A 0Z8.



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