

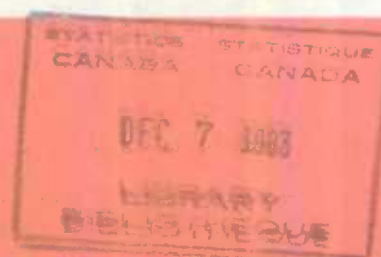


Statistics
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Weekly Bulletin



December 9, 1983

Gross National Product

Gross National Product at market prices rose 3.2% in the third quarter of 1983 to a level of \$396.7 billion, seasonally adjusted at annual rates. After allowing for a 1.1% increase in the overall price deflator, real GNP recorded the third consecutive increase, up 2.0%. This brings the recovery to date to 5.6% since the trough in the fourth quarter of 1982, although real GNP remains below the level recorded at the peak of activity in the second quarter of 1981.

The major source of growth in economic activity in the third quarter was a sharp swing in the volume of physical change in inventories to an accumulation of \$1.0 billion, following a decumulation of stocks through each of the previous seven quarters. The \$2.9 billion swing in the volume of physical change in inventories to an accumulation brings to an end the large 15% reduction in the volume of stocks which began in the fourth quarter of 1981. Final domestic demand continued to recover, up 0.7% after an increase of 1.8% in the second quarter. The slowing was largely attributable to a decline in residential investment following the high rate of activity

(continued on next page)

Canada's Merchandise Trade

On a seasonally adjusted balance-of-payments basis, preliminary results indicate that Canada's total exports increased 3.8% or \$295 million to \$8.1 billion in October 1983. Imports rose 5.4% or \$360 million to \$7.0 billion. As a result, the merchandise trade surplus continued to narrow for the sixth consecutive month and reached its lowest level this year at \$1.1 billion, \$60 million less than in September. The surplus for January-October 1983 stood at \$14.5 billion, \$0.4 billion lower than for the same period last year.

Commodity Analysis

The largest increases in October 1983 for exports, seasonally adjusted on a customs basis, were for coal (up \$80 million to \$130 million), wheat (up \$75 million to \$410 million), petroleum and coal products (up \$70 million to a monthly record level of \$305 million) and precious metals (up \$70 million to \$210 million). Other increases were for lumber (up \$55 million to \$425 million) and

(continued on next page)

LATEST MONTHLY STATISTICS

EMPLOYMENT, INCOME

| | | | | |
|------------------------------|-------|-----------|-----------|-------|
| Average Weekly Earnings (\$) | Aug | 389.78p | 389.28r | |
| Labour Income (\$ million) | Aug | 18,679.4p | 18,755.9p | 8.2 |
| Persons with Jobs (million) | Nov * | 10.71 | 10.82 | 3.4 |
| Unemployed | Nov * | 1,281,000 | 1,238,000 | -10.9 |

INVENTORIES

| | | | | |
|-----------------------------------|-------|-----------|-----------|------|
| Department Store (\$ million) | Sept. | 3,310.4 | 3,213.6 | 16.9 |
| Manufacturers' Owned (\$ million) | Sept. | 30,210.6p | 29,991.0r | -9.2 |

ORDERS

| | | | | |
|---|-------|-----------|-----------|------|
| Manufacturers' New Orders (\$ million) | Sept. | 21,557.1p | 17,134.6r | 36.5 |
| Manufacturers' Unfilled Orders (\$ million) | Sept. | 20,382.3p | 16,935.7r | 26.2 |

PRICES

| | | | | |
|---|--------|--------|--------|-----|
| Consumer Price Index (1981=100) | Oct. | 119.2 | 118.5 | 4.9 |
| New House Price Index (1976=100) | Oct. * | 131.4 | 131.3 | 0.9 |
| Raw Materials Price Index (1977=100) | Oct. | 211.1p | 211.3p | 5.1 |
| Excl. coal, crude oil, nat. gas | Oct. | 152.9p | 153.3p | 6.2 |
| Industry Selling Price Index (1971=100) | Oct. | 301.7p | 301.0p | 3.3 |

CONSTRUCTION

| | | | | |
|--|---------|----------|-----------|------|
| Building Permits (\$ million) | Sept. * | 1,113.3p | 10,766.8p | 14.5 |
| Housing Starts — Urban Centres (units) | Oct. * | 9,285 | 113,771 | 36.9 |

ENERGY

| | | | | |
|---|-------|---------|----------|------|
| Coal Production (thousand tonnes) | Aug. | 3,406.3 | 27,820.8 | -3.6 |
| Electricity Generation (terawatt hours) | Aug. | 30.7 | 255.2 | 2.1 |
| Natural Gas Production (million cubic metres) | Aug. | 6,608.5 | 61,091.6 | -6.0 |
| Petroleum Refining (million cubic metres) | Sept. | 8.1p | 63.4p | -6.5 |

FOREIGN TRADE

| | | | | |
|--|--------|--------|---------|-----|
| Exports — Balance of Payments Basis (\$ million) | Oct. * | 8,180p | 73,931p | 4.9 |
| Imports — Balance of Payments Basis (\$ million) | Oct. * | 7,021p | 59,814p | 6.8 |

PRODUCTION

| | | | | |
|--------------------------------------|------|----------|-----------|-----|
| Railway Carloadings (million tonnes) | Oct. | 20.1p | 170.7p | 0.3 |
| Steel (ingots — thousand tonnes) | Oct. | 1,230.1p | 10,482.7p | 0.9 |

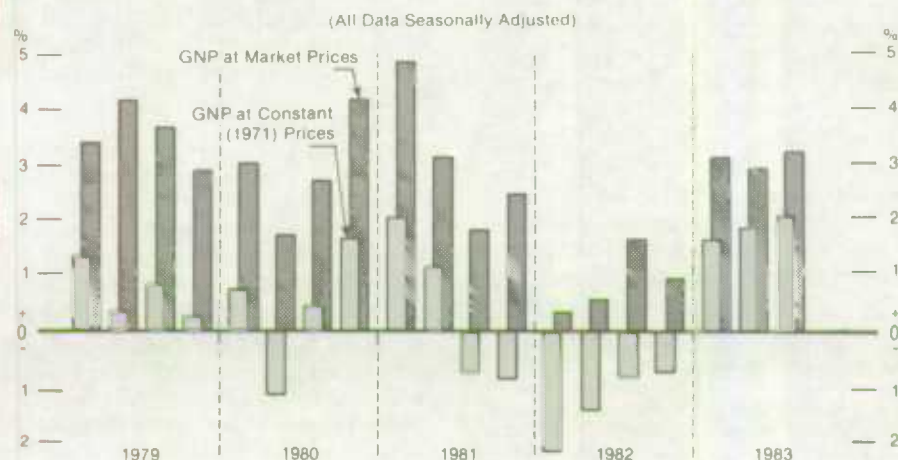
SALES

| | | | | |
|---------------------------------------|--------|-----------|------------|------|
| Department Store Sales (\$ million) | Oct. * | 922.0 | 8,059.6 | 7.1 |
| Manufacturers' Shipments (\$ million) | Sept. | 18,110.6p | 146,656.5p | 5.6 |
| New Motor Vehicle Sales (\$ million) | Sept. | 906.7 | 8,933.8 | 17.6 |
| Retail Sales (\$ million) | Sept. | 8,858.7p | 75,212.0p | 7.1 |

Statistics are in current dollars and are not seasonally adjusted.
p - preliminary, r - revised, * - new this week.

Canada's Gross National Product (GNP)

Quarter-to-Quarter Change



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

Canada

...Gross National Product

in the second quarter. Consumer demand slowed slightly in the third quarter. Purchases of durable goods continued to be the major source of growth, partly due to accelerated purchases of furniture and appliances. Business expenditure on machinery and equipment rose 4.1% following a 1.9% upturn in the second. The increase, which had been concentrated in motor vehicles in the second quarter, spread to include office and industrial machinery. In tandem with the increase in final domestic demand and inventories, imports rose a further 5.4% in real terms. The volume of export demand slowed to an increase of 2.0%.

Labour income rose 2.4% in the third quarter compared to an increase of 2.9% in the second. Excluding the effect of strikes and special payments however, labour income growth accelerated from an increase of 2.3% in the second quarter to 2.5% in the third.

Corporate profits rose a further 10.5% in the third quarter. Profits are now 74% higher than the trough in the third quarter of 1982 but remain below pre-recession levels. Higher sales and lower interest costs continue to contribute to the recovery of corporate balance sheets. The largest increases were recorded in the manufacturing and trade industries.

The personal saving rate rose to 14.2% of personal disposable income in the third quarter, up from 11.0% in the second. The irregular quarterly pattern of saving flows is largely attributable to the delay of income tax refunds, which are generally received in the first half of the year.

For further information, order the third quarter 1983 issue of National Income and Expenditure Accounts (13-001, \$6.35/\$25.40), or contact the Gross National Product Division (613-995-0601).

...Merchandise Trade

passenger cars (up \$55 million to \$730 million). The largest decreases were for exports of trucks (down \$55 million to \$380 million) and motor vehicle parts (down \$45 million to \$630 million).

The largest import increase in October 1983 was for crude petroleum (up \$145 million to \$505 million). This marked the fifth consecutive monthly increase after the May 1983 low point of \$69 million. Other large increases were for imports of precious metals (up \$85 million to \$135 million) and motor vehicle parts (up \$70 million to \$1,020 million). Import decreases in October were for aircraft (down \$190 million to \$105 million), metal ores, concentrates and scrap (down \$110 million to \$100 million) and passenger cars (down \$50 million to \$535 million).

For further information, order the October 1983 issue of Summary of External Trade (65-001, \$3.15/\$31.50), or contact Gordon Blaney (613-995-6305), Trade Inquiries Unit, or François Bordé (613-995-6115).

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Department Store Sales

Department stores in Canada had sales totalling \$922.0 million in October 1983, an increase of 7.3% from a year earlier. Cumulative sales for January to October 1983 reached \$8,059.6 million, up 7.1% from the 1982 level.

Department store sales by regions for the latest month were as follows, with percentage changes from October 1982 in brackets:

- Ontario, \$335.9 million (+11.0%)
- Quebec, \$173.2 million (+11.9%)
- British Columbia, \$146.8 million (+1.0%)
- Alberta, \$124.4 million (-2.3%)
- Atlantic provinces, \$63.5 million (+7.2%)
- Manitoba, \$47.5 million (+7.3%)
- Saskatchewan, \$30.7 million (+19.6%).

Data users should note that the British Columbia figures include as well those for the Yukon and Northwest Territories. See the October 1983 issue of Department Store Sales by Regions (63-004, \$1.55/\$15.50).

Building Permits

Canadian municipalities issued permits for building construction work estimated at a seasonally adjusted \$1,137.9 million in September 1983, little changed from the level recorded in August (\$1,137.7 million) and the preceding three months. In September 1982 — during the deepest part of the recession — building permits were valued at \$935.0 million.

Residential building permits were estimated at a seasonally adjusted \$657.4 million in September, up 6.7% from August.

The value of non-residential building permits decreased 7.9% to \$480.5 million in September from \$521.6 million a month earlier. The drop was wholly attributable to a softness of building intentions in the public sector where permits fell 37.5% to a seasonally adjusted \$117.0 million from \$187.3 million in August. Industrial building permits rose 22.8% to \$92.6 million from \$75.4 million and commercial projects were up 4.6% to \$270.9 million from \$258.9 million.

Gross Domestic Product

Gross Domestic Product, in constant 1971 prices, advanced 0.3% in September 1983 to \$119.7 billion at annual rates from \$119.3 billion in August. Most of the growth originated among the goods-producing industries which posted an output increase of 1.1%. Service-producing industries, however, recorded a 0.2% decline, the first monthly decline since February. Industrial production continued its recent pattern of growth, rising 1.8% in September, following a revised 1.1% gain in August.

Most of the September growth in GDP originated in mining and manufacturing. Mining output rose 8.5% in September, with widespread gains and especially sharp increases in iron mines, coal mines, crude petroleum and natural gas, and non-metal mines. Within manufacturing, significant growth showed up in pulp and paper mills, iron and steel mills, motor vehicle parts and accessories manufacturers, and producers of refined petroleum products.

For further information, order the September 1983 issue of Gross Domestic Product by Industry (61-005, \$3.15/\$31.50), or contact Ron Kennedy (613-995-0568), Industry Product Division.

Energy Statistics

Preliminary figures for the January to September 1983 period show that crude oil production in Canada increased by 3 793 megalitres (+7%) from the same period in 1982. This volume increase is quite comparable to the increase in the volume of crude exported, 3 452 ML (+39%). Total crude oil exports of 12 325 ML represented about 20% of the Canadian production during the period (61 487 ML).

Crude oil imports have returned to higher levels since July 1983 following six months of declines when imports were at half the 1982 levels. During July-September 1983, imports of crude reached 5 225 ML, 4% higher than last year's receipts and 16% higher than crude oil exports for the third quarter of 1983. On a cumulative basis, 1983 crude oil imports at a total of 10 702 ML remain 1 623 ML lower than exports for the same period and 32% lower than imports for the January to September period of last year.

Natural Gas

Exports of natural gas to the United States decreased by more than 10% during the first nine months of 1983; this has resulted in a decline in natural gas production of 7% compared with the same period of 1982. During the January to September 1983 period, sales of natural gas amounted to 30 668 gigalitres, down 6% from the year-earlier level.

Electricity

Electricity generation, which decreased by more than 3% during the first quarter of 1983, increased by about 7% between April and September 1983.

For further information, contact Richard Godin or Mike Valiquette (613-996-3139).

Balance of Payments

Canada's current account balance on a seasonally adjusted basis turned to a small deficit during July-September 1983, after five consecutive quarters of surpluses. The bulk of this shift was attributable to a sharp rise in imports, resulting in a large reduction in the merchandise trade surplus.

In the capital account, there was a noticeable decline in the inflow from new bond borrowings abroad, reflecting a combination of a lower volume of total new issues by Canadian borrowers and a relatively greater funding from the domestic market. This was somewhat tempered by unusually large inflows from new issues of Canadian stocks and further money market borrowings.

The main quarterly features were:

- On a seasonally adjusted basis, a shift of \$1.3 billion in the current account to a deficit of \$186 million. This was composed of a surplus of \$4.1 billion on merchandise trade and a deficit of \$4.3 billion on non-merchandise transactions (services and transfers);

- A decline of \$1.2 billion from \$5.3 billion in the surplus on merchandise trade as the rise in imports (9%) more than offset the increase in exports (1%). This decline was widespread, reflecting lower surpluses with the United States, the United Kingdom, Japan, EEC and the total of all other countries. The value of exports reached a record \$23.0 billion while imports, at \$18.9 billion, were at their highest quarterly level in the last two years;

- among exports, large increases in crude petroleum, in forest products and in barley. There were significant declines in exports of coal and other bituminous substances, wheat and fish;

- among imports, a very strong increase in crude petroleum, almost doubling the exceptionally low value of the previous quarter. Large increases were also recorded in the following end products: automotive products, industrial machinery, communications and related equipment and office machinery and equipment. There was a decline in metal fabricated basic products;

- A slight increase in the deficit on services to \$4.5 billion with both receipts and payments advancing. Receipts increased by \$260 million due to dividends from direct investment abroad and revenues on business services. Payments increased by \$381 million, caused mainly by interest payments on the higher net foreign currency liability of the chartered banks as well as to business services;

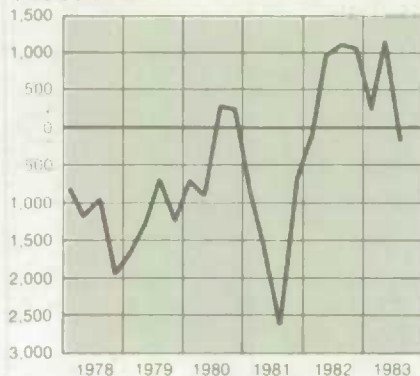
- Unadjusted for seasonal variations, a current account surplus of \$443 million. This compared with a \$2.1 billion surplus in the third quarter 1982 when imports were depressed.

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

Canadian Balance of International Payments

Current Account — Seasonally Adjusted

Millions of Dollars



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

Capacity Utilization Rates

Capacity utilization in Canadian manufacturing industries continued to rise in the third quarter of 1983, increasing 3.5% to a level of 70.5% from 68.1% in the second quarter. Although five of the 20 industry groupings posted lower capacity utilization rates, this was more than offset by the industries which recorded increases in their rates: the two most important gains were 16.8% in the wood industries group and 13.8% in the petroleum and coal products group.

However, while the capacity utilization rate for the total manufacturing group has been steadily increasing over the last three quarters, the rate is still well below the 81.5% level recorded in the second quarter of 1981.

Durable manufacturing industries recorded a 5.6% increase in capacity utilization, moving to 63.6% in the third quarter of 1983 from 60.2% in the second quarter, while in the non-durable sector the increase was 2.1% to 77.7% from 76.1%.

For further information, order the July-September 1983 issue of *Capacity Utilization Rates in Canadian Manufacturing* (31-003, \$5.30/\$21.20), or contact D. Wallace or S. Wood (613-995-8152), Construction Division, Statistics Canada, Ottawa K1A 9Z9.

Railway Operating Statistics

The seven major railways in Canada reported a combined net income from operations of \$23.8 million in August 1983. Operating revenues of \$556.1 million were up 19.0% from the 1982 figure.

Revenue freight tonne-kilometres were up by 18.5% from a year earlier in August 1983, freight train-kilometres rose 12.6% and freight car-kilometres 14.9%. Revenue passenger-kilometres decreased by 2.4% to 270.8 million.

For further information, order the August 1983 issue of *Railway Operating Statistics* (52-003, \$2.65/\$26.50), or contact the Rail Unit (613-996-9271).

Labour Force Survey

Canada's seasonally adjusted unemployment rate remained at 11.1% in November 1983, unchanged from the October level. The participation rate edged up to 64.1% from 64.0% in the preceding month and the employment/population ratio increased to 57.0% from 56.9%.

The seasonally adjusted level of employment for the week ending November 12, 1983 was an estimated 10,769,000, an increase of 25,000 from October. Employment rose by 21,000 for females 25 years of age and over while there was little change for the other age/sex groups. On a provincial basis, employment increases were registered in Ontario (+27,000) and Quebec (+15,000) while a decline was recorded in Newfoundland (-6,000).

Unemployment was estimated at 1,347,000, seasonally adjusted, in November, virtually unchanged from the October level. Unemployment increased by 18,000 among males aged 15 to 24, while it declined by 10,000 for males and females aged 25 years and over, and by 7,000 for females aged 15 to 24. Provincially, unemployment fell by 4,000 in Manitoba and rose by 3,000 in Newfoundland.

Seasonally adjusted unemployment rates for the provinces in November were as follows, with October rates in brackets: Newfoundland, 19.9% (18.3%); Prince Edward Island, 10.4% (12.1%); Nova Scotia, 12.8% (13.1%); New Brunswick, 14.7% (14.0%); Quebec, 13.5% (13.5%); Ontario, 9.1% (9.2%); Manitoba, 8.6% (9.3%); Saskatchewan, 7.7% (7.4%); Alberta, 10.5% (10.1%); and British Columbia, 13.9% (13.5%).

The unadjusted employment level for Canada was estimated at 10,714,000 in November 1983, an increase of 355,000 (+3.4%) from a year earlier. Unemployment dropped by 10.9% over the 12-month period to 1,281,000 from 1,438,000. The unemployment rate at 10.7% in the latest month was down from 12.2% in November 1982 while the participation rate increased to 63.5% from 63.2% and the employment/population ratio rose to 56.7% from 55.5%.

For further information, order the November 1983 issue of *The Labour Force* (71-001, \$3.70/\$37).

Provincial Governments

Employees of Canada's provincial and territorial governments (excluding general government employees in British Columbia) and government enterprises (including British Columbia) numbered 549,939 as of June 1983, an overall decrease of 5,882 (-1.1%) from June 1982. General government employees increased by 3,389 (0.9%) while those in government enterprises declined by 9,271 (-5.6%).

Gross payrolls (including overtime and retroactive payments, but excluding general government payrolls in British Columbia) for April-June 1983 were \$3,427.9 million, a decrease of \$42.3 million (-1.2%) from the corresponding quarter in 1982.



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