

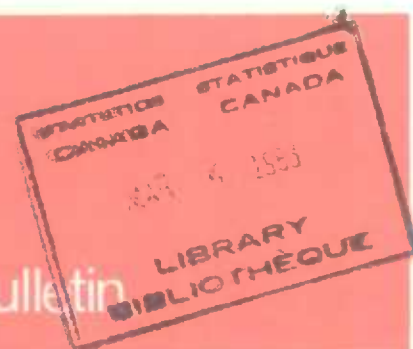


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Weekly Bulletin



March 4, 1983

LATEST MONTHLY STATISTICS

EMPLOYMENT, INCOME

			Previous Month	% Change From Year Ago
Average Weekly Earnings (\$)	Nov.	398.74p	399.95p	8.2
Labour Income (\$ million)	Nov.	16,686.8p	16,850.7p	2.7
Persons with Jobs (million)	Jan.	10.06	10.25	-3.4
Unemployed	Jan.	1,598,000	1,494,000	45.8

INVENTORIES

Department Store (\$ million)	Dec.	2,939.0	3,324.7	3.3
Manufacturers' Owned (\$ million)	Dec.	31,279.8p	31,775.0r	-6.3

ORDERS

Manufacturers' New Orders (\$ million)	Dec.	13,968.1p	15,401.9r	-4.7
Manufacturers' Unfilled Orders (\$ million)	Dec.	16,448.0p	16,927.0r	-13.3

PRICES

Consumer Price Index (1981=100)	Jan.	114.1	114.4	8.3
New House Price Index (1976=100)	Jan.*	129.5	129.6	-4.5
Raw Materials Price Index (1977=100)	Jan.*	206.6p	201.8p	7.0
Excl. coal, crude oil, nat. gas	Jan.*	145.8p	143.9p	0.1
Industry Selling Price Index (1971=100)	Jan.*	292.5p	292.2p	3.8

CONSTRUCTION

Building Permits (\$ million)	Nov.	964.5p	11,498.6p	-31.3
Housing Starts — Urban Centres (units)	Dec.	10,498	104,792	-26.4

ENERGY

Coal Production (thousand tonnes)	Dec.	3 806	42 814	6.8
Electricity Generation (terawatt hours)	Dec.	35.1	375.4	-0.8
Natural Gas Production (million cubic metres)	Nov.	9 044.6	88 815.1	1.0
Petroleum Refining (million cubic metres)	Dec.	7.7p	90.4p	-13.2

FOREIGN TRADE

Exports — Balance of Payments Basis (\$ million)	Dec.	7,026p	84,253p	0.0
Imports — Balance of Payments Basis (\$ million)	Dec.	5,000p	66,436p	-13.6

PRODUCTION

Railway Carloadings (million tonnes)	Jan.	13.8p	13.8p	-7.7
Steel (ingots — thousand tonnes)	Jan.	842.4p	842.4p	-30.3

SALES

Department Store Sales (\$ million)	Dec.	1,608.3	10,206.4	-0.1
Manufacturers' Shipments (\$ million)	Dec.	14,447.1p	182,996.6p	-3.3
New Motor Vehicle Sales (\$ million)	Dec.	729.5	9,824.0	-17.6
Retail Sales (\$ million)	Dec.	10,612.7p	97,351.6p	3.2

Statistics are in current dollars and are not seasonally adjusted.

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

Unemployment Insurance

Benefits paid to unemployment insurance claimants in December 1982 amounted to \$892 million, an increase of 3% from November and 87% from December 1981. Disbursements for the calendar year 1982 reached a record level of \$8.6 billion, up 78% from the \$4.8 billion paid out in 1981. Residents of Quebec received 34% of the total payments; Ontario, 28%; the Atlantic provinces and British Columbia, 14% each, and the Prairie provinces, 11%.

Claimants qualifying for benefits for the week ended December 11 numbered 1,364,000, up 11% from the previous month and 55% from a year earlier. The monthly average of beneficiaries for 1982 was 1,133,000, an increase of 57% from 1981.

Claims filed by persons applying for benefits in December totalled 388,000, down 11% from November (increases of about 7% were recorded between these months in 1981 and 1980). Claims received in the calendar year 1982 totalled 3,919,000, a rise of 33% from 1981: above-average increases were recorded in Alberta (up 86%), British Columbia (up 47%), Manitoba (up 45%) and Ontario (up 41%).

For further information, order the October-December 1982 issue of *Statistical Report on the Operation of the Unemployment Insurance Act* (73-001, \$6.35/\$25.40), or contact George Fincham (613-995-8445), Labour Division, Statistics Canada, Ottawa K1A 0V1.

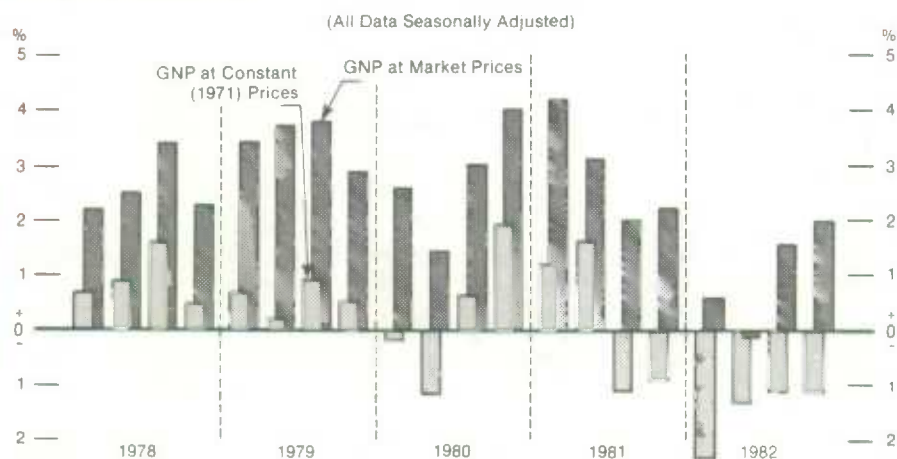
Gross National Product

Preliminary estimates show that Gross National Product at market prices rose 2.0% in the fourth quarter of 1982 to a level of \$356.7 billion, seasonally adjusted at annual rates. In real terms, that is, after allowing for the change in the overall implicit price index, GNP fell 1.1% and ended the year 7.5% below its peak in the second quarter of 1981.

The quarterly decline was the sixth in a row, and while its magnitude was about as large as in the preceding two quarters, its composition was more consistent with the growing belief that the recession, which began in the summer of 1981, is nearly over. Final domestic demand (the sum of consumer spending, government spending and business fixed investment) rose in real (continued on next page)

Canada's Gross National Product (GNP)

Quarter-to-Quarter Change



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

terms for the first time since the second quarter of 1981, and while the increase was a modest 0.7%, sustained growth here is important to economic recovery. The decline in the quarter was mainly due to a fall in real net exports, as both exports and imports declined very sharply, and to a faster rate of inventory disinvestment, particularly among durable goods, where manufacturing stock-to-sales ratios have been persistently high.

Real personal expenditure was virtually unchanged in the fourth quarter, with services up 1.0% and goods down 0.3%. Within goods, the durables component rose a moderately strong 2.1%, due largely to higher expenditure on furniture and household appliances, which may be associated with lower interest rates and the upsurge of activity in the housing market. Purchases of new and used automobiles also rose.

Constant dollar expenditure on housing rose 10.4% in the fourth quarter but this was almost exclusively due to increased real estate commissions earned in resale markets which reflected lower interest rates and government home ownership stimulation programs. Work-put-in-place was little changed from the previous quarter.

Business expenditure on plant and equipment in real terms was little changed during the quarter, following three quarters of declines. This left the level 16.7% below the fourth quarter of 1981.

Real stocks of non-farm business inventories were reduced by \$4.4 billion in the fourth quarter as final domestic demand rose slightly and production continued to decline, particularly early in the quarter.

Merchandise exports fell 10.9% in volume and merchandise imports declined 10.8%. Real net exports fell, but the terms of trade moved sharply in Canada's favour, so the current dollar surplus on trade in goods and services rose slightly to \$3.1 billion in the fourth quarter.

Wages, salaries and supplementary labour income rose 1.3% in the quarter, and were only 3.6% above the level a year earlier. Average hourly earnings continued to decelerate rapidly, notably in the manufacturing sector.

Corporate profits before taxes jumped 17.5% in the quarter. Strong gains in the financial and trade industries led the increase, more than offsetting a large decline in manufacturing.

1982 Annual Gross National Product Gross National Product at market prices rose 5.3% in 1982, to a level of \$348.9 billion. This increase comprised a rise of 10.6% in overall prices, and a drop of 4.8% in the volume of goods and services produced. The fall in real GNP was the first for a calendar year since 1954 and the most pronounced annual decline since 1933.

For further information, order the *Fourth Quarter 1982 issue of National Income and Expenditure Accounts* (13-001, \$6.35/\$25.40), or contact the *Gross National Product Division* (613-995-0601), Statistics Canada, Ottawa K1A 0T6.

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Raw Materials Price Index

The Raw Materials Price Index (1977=100) reached a preliminary level of 206.6 in January 1983, up 2.4% from 201.8 (revised) in December and 7.0% higher than the year-earlier level of 193.1. The Raw Materials Price Index excluding coal, crude oil and natural gas rose 1.3% in the latest month to stand 0.1% higher than in January 1982; this marked the first month since August 1981 that the year-over-year change registered an increase.

The main contributor to the January increase in the total index was a 3.2% rise in the coal, crude oil and natural gas component. An increase of \$4 per barrel in the wellhead price of crude oil, partly offset by a decrease of \$2.54 in the petroleum compensation charge, resulted in a net increase of about 4% for oil and a 3.2% rise in the index level for this component.

The non-ferrous metals index rose 7.2% in January, led by sharp increases for silver (+18%), gold (+9.0%) and copper (+10%). Recent price increases for these three metals have resulted in the first year-over-year increase (+6.4%) shown for this group since November 1980. However, prices for other metals were still below their levels of a year earlier.

The 2.8% rise in the vegetable materials component in January was largely due to a marked price increase (about 25%) for imported fresh vegetables.

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Industrial Corporations

Fourth quarter 1982 results indicate a significant slowing in the rate of decline in profits of Canadian industrial corporations: quarterly net profits after taxes were down 27.5% from 1981 levels compared to declines of 51.2% and 53.3% for the two preceding quarters. After-tax profits of industrial corporations fell to \$2.4 billion from \$3.3 billion in the same quarter of 1981. In the second quarter of 1981, just before the recession began, profits were at a level of \$5.2 billion.

Seasonally adjusted data confirm a change in the profits trend that had developed over the recession. In each of the first four quarters following the start of the recession in mid-1981 seasonally adjusted book profits before taxes and extraordinary items marched rapidly downwards at the rate of about 16%. In the last half of 1982, however, this indicator bottomed out, rising 7.8% in the third quarter and falling 5.2% in the current quarter for a net increase of 1.0% for the past half year. (Seasonally adjusted profits data have the advantage of eliminating seasonal factors that can cloud the current picture for this otherwise very volatile indicator.)

If the effects of the transportation equipment industry (which had experienced unusually higher seasonally adjusted profits in the third quarter) were removed, the trend picture is even clearer for the third and fourth quarters of 1982: seasonally adjusted profits movements would have been +3.1% and +1.5%.

The main source of strength in profits in the latest quarter occurred in the mineral fuels and related industries, primarily because of recent oil price increases in Canada. The main source of weakness was in metal mining and in most manufacturing industries.

For 1982 as a whole, sales of industrial corporations slipped 2.0% to \$490.9 billion, while profits after taxes declined 45.4% to \$9.5 billion.

For further information, contact Tom Maxwell or Bill Potter (613-995-9751), Business Finance Division, Statistics Canada, Ottawa K1A 0T6.

Industrial Production

Preliminary data indicate industrial production decreased 0.8% in December 1982 with the index (1971=100) declining to a level of 116.2 from 117.2 in November 1982.

The main contributors to this overall production decrease included iron and steel mills, manufacturers of electrical products, rubber and plastic products, food and beverages and electric power utilities; an output increase was recorded in the transportation equipment industry.

For further information, order the *December 1982 issue of Gross Domestic Product by Industry* (61-005, \$3.20/\$31.80), or contact R. Kennedy (613-995-0568), Industry Product Division, Statistics Canada, Ottawa K1A 0T6.

Private/Public Investment in Canada, Outlook 1983

Capital expenditures by all sectors of the Canadian economy during 1983 are estimated to total \$72,745 million, 3.2% below the level of \$75,123 million in 1982 which was, in turn, down 5.6% from \$79,604 million in 1981. The forecast for 1983 is the first estimate based on a survey conducted between November 1982 and January 1983. The current totals for 1982 and for 1981 are updates on earlier estimates of \$80,578 million for 1982 and \$78,512 million for 1981.

The construction portion of capital spending in 1983 is expected to be \$45,362 million, down 2% from \$46,288 million in 1982, which was a decrease of 3.3% from the \$47,860 million in 1981. The residential part of the total is projected at \$10,727 million (+8.5%), a turnaround following the 24.7% 1982 decrease to \$9,891 million from \$13,135 million in 1981. The number of housing starts used in these estimates are 145,000 for 1983, 125,900 for 1982 and 178,000 for 1981. The remainder of the construction program — represented by non-residential building and engineering structures — is estimated at \$34,635 million for 1983, down 4.8% from \$36,397 million for 1982 which was up 4.8% from \$34,724 million for 1981. Totals for machinery and equipment are \$27,383 million for 1983, down 5% from \$28,835 million for 1982 after a drop of 9.2% from \$31,744 million for 1981.

The business sector reflects an even larger decrease in 1983 than in 1982: the total of \$50,337 million this year is 6.9% below the \$54,092 million last year, which was 4.0% below the \$56,340 million in 1981. In contrast, the social capital of institutions and governments reflects an increase of 4.9% in 1983 to \$11,681 million from the 1982 total of \$11,140 million, which was, in turn, up 10.0% over the 1981 figure of \$10,129 million.

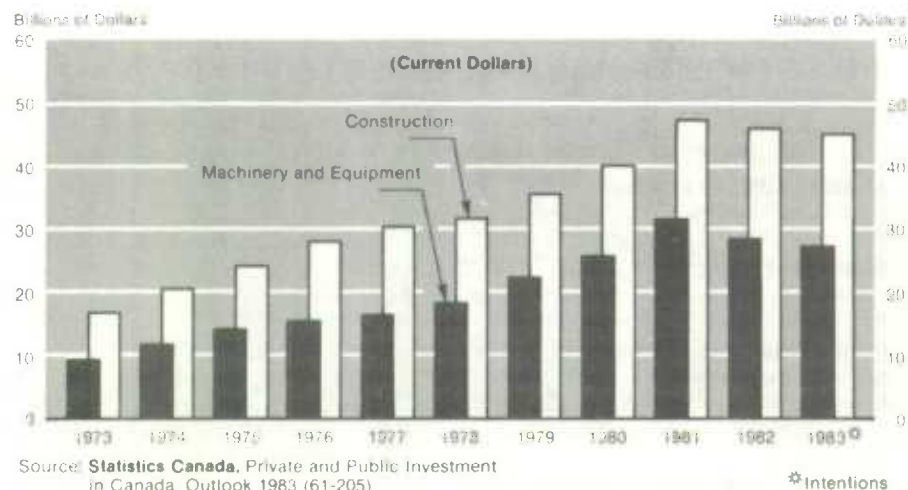
In the Business Sector

In the business sector, the mining, quarrying, petroleum and gas wells group shows an increase of \$366 million or 3.9% for 1983, mostly as a reflection of an expanded program for petroleum and gas wells, and to a much smaller extent for coal mining.

The other broad groupings of business show overall declines in 1983. The manufacturing sector shows a drop of \$1,968 million or 17.7% compared with a decline of \$1,611 million or 12.6% in 1982. The area of trade-finance-commercial drops by \$1,139 million (-11.7%) compared with a decrease of \$1,164 million in 1982 or a 10.7% decrease from 1981. Transportation-communication-other utilities, as a group, currently indicate a reversal of the 10.2% increase in 1982 (+\$1,659 million) for a decrease of 4.6% (-\$824 million) in 1983.

Further information may be obtained by contacting Duncan Lusick or Richard Landry (613-995-9013), Construction Division, Statistics Canada, Ottawa K1A 0T6.

Capital Expenditures, Canada, 1973-1982 and Intentions, 1983



New Housing Price Indexes

The Canada composite new housing price index (1976=100) declined 0.1% to 129.5 in January 1983 from 129.6 in December 1982. As a result, the index stood 4.5% lower than the year-earlier level of 135.6.

The most significant increase in prices of new houses in January 1983 was recorded in Quebec City (1.2%); advances of 0.5% were registered in both Montreal and Kitchener, while Vancouver had an increase of 0.4% and smaller advances were noted in Ottawa-Hull (0.3%), Edmonton (0.2%) and Toronto (0.1%). The most notable decline was posted in Calgary (-1.8%); other monthly declines were observed in Victoria (-0.4%), Saskatoon (-0.1%) and Winnipeg (-0.1%).

On a year-over-year basis, the largest increase in new housing prices was recorded in Hamilton (11.4%); other increases ranged from 0.7% in Regina to 5.7% in Kitchener. The largest yearly decreases occurred in Vancouver (-17.1%) and Victoria (-15.5%), while other declines ranged from -0.7% in London to -10.3% in Calgary.

For further information, contact Prices Division (613-996-3744), Statistics Canada, Ottawa K1A 0T6.

Energy Statistics

Preliminary figures for 1982 show a significant change in Canada's crude oil and petroleum products position compared with 1981: highlights were a drop of 10.7% in domestic demand for refined petroleum products and a jump of 31% in crude oil exports.

Domestic sales of refined petroleum products totalled 83 896 megalitres in 1982, the third consecutive annual decline from the record level of 103 046 ML reached in 1979. Changes in consumption habits and the economic recession contributed to the decline.

Canadian refineries operated at lower levels during 1982, producing 90 448 ML of refined petroleum products, 13% less than

in 1981. Deliveries to refineries of Canadian crude oil decreased by 6.6%, while imports of foreign crude plummeted by 33%.

Despite these decreases, Canadian crude oil production maintained a level comparable to 1981, buoyed by stronger exports to the United States which totalled 12 398 ML in 1982, 31% higher than in the previous year.

For further information, contact Richard Godin or Mike Valiquette (613-996-3139), Energy and Minerals Section Manufacturing and Primary Industries Division, Statistics Canada, Ottawa K1A 0T6.

1981 Census Data

Advance data compiled from information collected from one in five Canadian households in the June 3, 1981 Census are now available. This first group of advance sample data includes tables summarizing basic information on nuptiality, fertility, education, mobility, labour force activity, occupation and industry, as well as information on housing. Some tables provide historical comparisons while others refer only to 1981. Geographical areas covered include Canada and the provinces and differ from table to table.

Single copies of the tables can be obtained, free of charge, by writing to Statistics Canada's regional offices or Central Inquiries.

A limited amount of sub-provincial data can also be purchased at these locations. Requests for special tabulations should be addressed to the Customer Services Section, Statistics Canada, Jean Talon Building, 2-D2, Ottawa K1A 0T6.

Complete tabulations will be released in printed bulletins, and on tape and microfiche throughout the coming year.



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