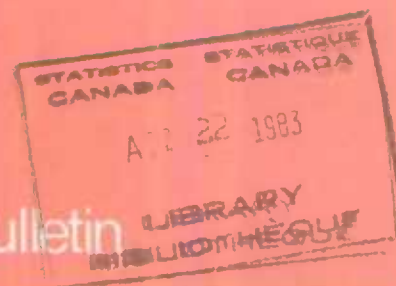


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Weekly Bulletin



April 22, 1983

Consumer Price Index

The Consumer Price Index (CPI) for Canada stood at 115.8 (1981=100) in March 1983, up 1.0% from 114.6 in February. Although the monthly change was up significantly from those recorded in the last eight months, the year-over-year increase decelerated to 7.2% from the 7.4% registered between February 1982 and February 1983. The latest monthly increase was largely attributable to higher transportation costs and increased housing charges, primarily reflecting price increases for gasoline and fuel oil. The all-items-excluding-food index advanced by 1.4% in the latest month, while food prices declined 0.3%.

A decline of 0.4% in the food-purchased-from-stores index was largely attributable to the impact of food price wars in the province of Quebec and to lower prices for certain beef and pork cuts and for fresh fruit in several western urban centres. In March 1983, the index stood 2.9% above its level of a year earlier. The food-purchased-from-restaurants index registered an increase of 0.1% and stood 7.8% above its level of March 1982. As a result the aggregate food index advanced 4.1% over the latest 12 months.

The increase of 1.4% in the all-items-excluding-food index was largely attributable to higher fuel oil and gasoline prices, reflecting among other things, the delayed impact of the January 1st increase of \$4 per barrel in crude oil prices. As well, gasoline prices were further affected by the ending of gasoline price wars in several urban centres and by an increase in the federal sales tax. In the province of Manitoba, the provincial retail sales tax was increased to 6% from 5%. Between March 1982 and March 1983, the all-items-excluding-food index advanced 8.1%.

Viewed in terms of goods and services, the price level for goods advanced 1.6%, largely reflecting the increase in fuel oil and gasoline prices, while that for services increased by 0.3%. As a result, between March 1982 and March 1983, the price level for goods advanced by 6.6% while that for services increased by 8.1%.

On a seasonally adjusted basis, the all-items CPI rose 0.7% in March; this comprised a 0.4% decline in the food index and a 1.0% increase in the all-items-excluding-

(continued on next page)

LATEST MONTHLY STATISTICS

EMPLOYMENT, INCOME

			Previous Month	% Change From Year Ago
Average Weekly Earnings (\$)	Jan.	402.63p	398.64p	6.6
Labour Income (\$ million)	Dec.	16,410.3p	16,563.0p	2.8
Persons with Jobs (million)	Mar.	10.24	10.14	-2.1
Unemployed	Mar.	1,658,000	1,585,000	35.0

INVENTORIES

Department Store (\$ million)	Feb.*	2,686.8	2,724.4	2.6
Manufacturers' Owned (\$ million)	Feb.*	32,156.9p	32,030.2r	-7.1

ORDERS

Manufacturers' New Orders (\$ million)	Feb.*	14,905.3p	14,274.0r	2.2
Manufacturers' Unfilled Orders (\$ million)	Feb.*	17,188.4p	16,897.0r	-9.1

PRICES

Consumer Price Index (1981=100)	Mar.*	115.8	114.6	7.2
New House Price Index (1976=100)	Feb.	129.5	129.5	-4.4
Raw Materials Price Index (1977=100)	Feb.	208.6p	206.8p	6.2
Excl. coal, crude oil, nat. gas	Feb.	149.0p	146.0p	-0.5
Industry Selling Price Index (1971=100)	Feb.	293.6p	292.7p	3.6

CONSTRUCTION

Building Permits (\$ million)	Jan.	581.9p	581.9p	-23.5
Housing Starts — Urban Centres (units)	Feb.	6,661	15,175	-19.8

ENERGY

Coal Production (thousand tonnes)	Feb.*	3,223	7,219	4.4
Electricity Generation (terawatt hours)	Jan.	36.7	36.7	-7.8
Natural Gas Production (million cubic metres)	Dec.	9,924.6	98,764.0	0.8
Petroleum Refining (million cubic metres)	Feb.*	6.8p	14.2p	-8.5

FOREIGN TRADE

Exports — Balance of Payments Basis (\$ million)	Feb.	6,661p	13,099p	2.2
Imports — Balance of Payments Basis (\$ million)	Feb.	5,234p	10,367p	-1.2

PRODUCTION

Railway Carloadings (million tonnes)	Mar.*	17.5p	45.3p	-10.0
Steel (ingots — thousand tonnes)	Mar.	1,079.7p	2,659.6p	-27.3

SALES

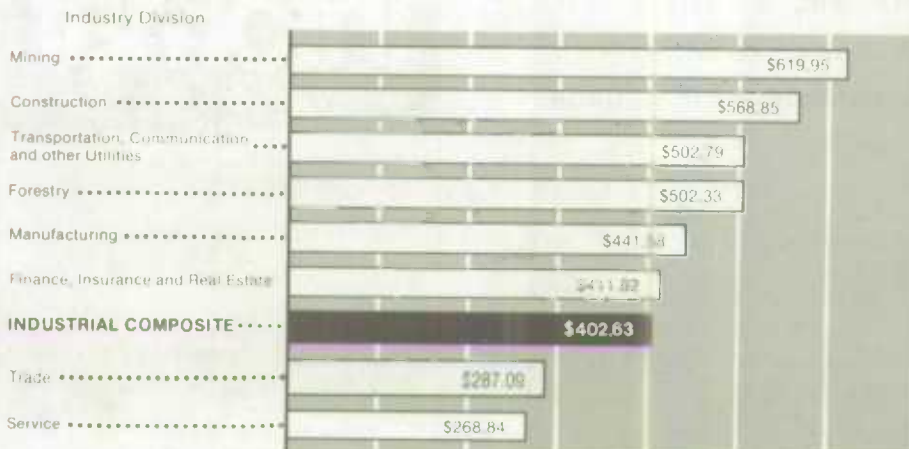
Department Store Sales (\$ million)	Feb.	609.7	1,233.1	4.7
Manufacturers' Shipments (\$ million)	Feb.*	14,613.9p	28,443.8p	0.6
New Motor Vehicle Sales (\$ million)	Feb.	681.0	1,261.3	-5.2
Retail Sales (\$ million)	Feb.*	6,760.2p	13,642.5p	3.6

Statistics are in current dollars and are not seasonally adjusted.

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

Average Weekly Earnings in Canadian Industry

January 1983 *



Source: Statistics Canada, Employment, Earnings and Hours (72-002)

* First Estimates

Canada

food index during the month.

City Highlights

Between February and March, consumer prices rose in all cities for which CPIs are produced with increases ranging from 0.6% in both Regina and Saskatoon to 1.8% in Thunder Bay. The major factors underlining the variation in price movements among the cities were the differing rates of price changes for gasoline and food. Gasoline price increases ranged from 6.4% in Halifax to 29.8% in Thunder Bay, with the significantly higher rates of increase being attributable to the ending of price wars. Food price changes ranged from a decline of 1.9% in Quebec City to an increase of 0.6% in Halifax.

For further information, order the March 1983 issue of *The Consumer Price Index* (62-001, \$2.65/\$26.50), or contact Sandra Shadlock or Suzanne Gratton (613-995-4078). Prices Division, Statistics Canada, Ottawa K1A 0T6.

Security Transactions

Transactions with non-residents in outstanding Canadian securities produced a net capital outflow from Canada of \$54 million in February 1983, compared to a net outflow of \$15 million in January.

Non-residents reduced their holdings of outstanding Canadian equities by \$76 million in February, a shift from the net investment of \$32 million in January. (The gross value of trading in Canadian equities by non-residents exceeded \$1 billion in the current month, the highest level since August 1981.) Non-residents added to their holdings of Canadian outstanding bonds in February, producing a net capital inflow of \$22 million, compared with a net outflow of \$47 million in January; Japanese investors were the principal buyers.

Farm Product Prices

The Canada index number of farm prices of agricultural products (1971=100) stood at 285.0 in February 1983, up 1.2% from the January index of 281.5 but 2.6% lower than the year-earlier level of 292.3.

The index, which measures (as closely as can be determined) prices received by producers at the farm gate, is available in the publication *Index Numbers of Farm Prices of Agricultural Products* (62-003, \$1.55/\$15.50).

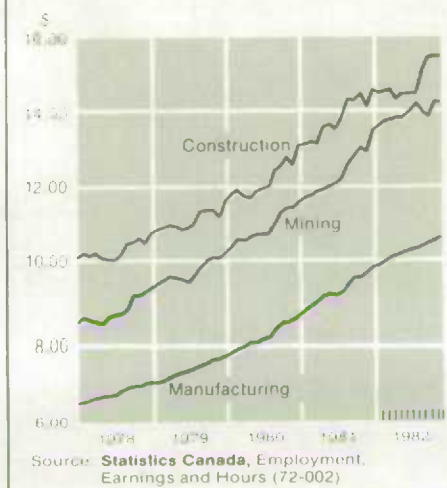
Farm Numbers in Canada

The number of Canadian farms declined less than 1% in 1982 to 316,770 from 318,361 in the previous year. Percentage decreases in farm numbers from the 1981 Census estimates were largest in the Eastern Canada provinces.

In recent years, farm numbers in Canada have shown a steady decline: in 1951 there were 623,091 farms compared with the 318,361 total for 1981.

For further information, contact Steven Danford (613-995-4895), Agriculture Statistics Division, Statistics Canada, Ottawa K1A 0T6.

Average Hourly Earnings in Canadian Industry



Employment in Industry

First estimates of seasonally adjusted data show that the Canada industrial composite index of employment increased 0.3% in January 1983 from the December level. Increased employment was registered in all industry divisions except mining (including milling), construction, finance, insurance and real estate and service which showed decreases. Employment rose in Quebec, Ontario and British Columbia but fell in the Atlantic and Prairie regions.

Average weekly earnings at the Canada industrial level decreased by 1.5% to \$402.67 in January 1983 from \$408.82 in December 1982. All industry divisions and all regions registered declines.

Average weekly hours decreased in mining (including milling), manufacturing and construction. Average hourly earnings increased in manufacturing but decreased in mining (including milling) and construction.

Retail Trade

Total retail sales in Canada, without seasonal adjustment, were \$6,760.2 million in February 1983, up 3.6% from the February 1982 level. Among the 28 kinds of businesses surveyed, 20 showed increased sales with the largest gains recorded for furniture, TV, radio and appliance stores (+21.0%), pharmacies, patent medicine and cosmetics stores (+17.9%) and used car dealers (+16.0%). The largest sales decreases were reported by jewellery stores (-5.7%), service stations (-4.4%) and garages (-3.0%).

Retail sales in February 1983 were up from a year earlier in all provinces except Alberta (-3.8%), British Columbia (-2.4%) and the Yukon and Northwest Territories (-7.9%). Advances ranged from +2.4% in Manitoba to +15.8% in Prince Edward Island. In metropolitan areas, retail sales were higher in Montreal (+1.8%), Toronto (+6.5%) and Winnipeg (+3.4%), but decreased in Vancouver (-4.2%).

Revised total retail trade for January 1983 was \$6,882.3 million, an increase of 3.6% over January 1982.

Cumulative sales for January-February 1983 were \$13,642.5 million, up 3.6% over the corresponding period in 1982.

Seasonally adjusted, retail sales in February 1983 dropped 1.7% from the preceding month to a level of \$8,272.4 million. Sales were up in Manitoba (+2.0%) and New Brunswick (+0.2%) but declined in the remaining provinces, with decreases ranging from -0.1% in British Columbia to -3.7% in Newfoundland.

For further information, order the February 1983 issue of *Retail Trade* (63-005, \$3.70/\$37), or contact the Retail Trade Section (613-996-9304), Merchandising and Services Division, Statistics Canada.

Refined Petroleum Products

Preliminary data show net sales in Canada of all refined petroleum products plunged 12.0% to 6 731.0 thousand cubic metres in February 1983 from 7 651.9 thousand cubic metres a year earlier.

Canadian refineries produced 6 825.4 thousand cubic metres of refined petroleum products in the latest month, down 7.0% from 7 336.3 thousand cubic metres in February 1982.

For further information, order the February 1983 issue of *Refined Petroleum Products* (45-004, \$3.70/\$37).

Coal Production in Canada

Canadian production of coal declined by 2.8% to 3 223 kilotonnes in February 1983 from 3 316 KT a year earlier. Exports of coal decreased to 853 KT from 1 126 KT, while landed imports were up to 187 KT from 12 KT in February 1982.

Production of coal in the first two months of 1983 totalled 7 219 KT, up 4.4% from 6 917 KT in the January-February 1982 period.

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Canadian Leading Indicator

According to the record increase of the leading indicator in January 1983, a recovery of economic activity is occurring, while the coincident indicators of production and employment strongly suggest appreciable growth in the first quarter of 1983. The composite indicator rose for the fourth straight month in January to 114.55, posting both a record gain of 2.34% and a wide diffusion as nine of the 10 components increased. This gain reflects the vigorous upturn of the non-filtered index in the last two months (of 4.3% in January to 123.9). The increase has been led by the indicators of household and export demand, which were supplemented by the positive reaction of manufacturing activity in January. The conditions for a more sustained recovery of activity appear to be in place in the first quarter, with the stabilization of interest rates at lower levels, a recovery of activity in the United States, and the improved prospects for real labour income. It is still too early, however, to determine precisely the force or the longevity of the recovery.

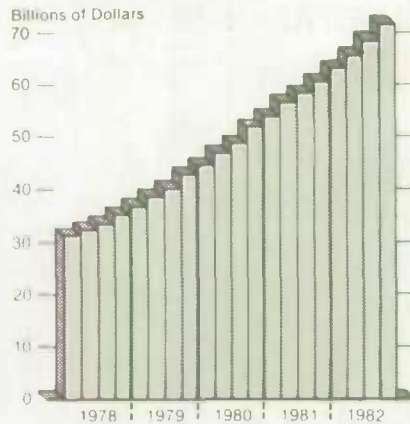
The recent movement of the indicators of personal expenditure on goods up to January suggests a sharp upturn of real consumer demand in the first quarter. Sales of furniture and household appliances as well as new vehicle sales continued to increase in January, up 3.52% and 1.38% respectively. Their levels are 6.0% and 2.8% above the average for the fourth quarter despite a slight faltering in the non-filtered versions in January, as the recent strong gains have been aided by transitory factors. The appreciable increase of employment in trade in February and March, nevertheless, underscores the sustained recovery of consumer confidence, which continued to respond positively to lower interest rates and to the gradual improvement in labour market conditions in the first quarter. This positive underlying trend of demand was reflected in the diffuseness of the average 1.2% monthly increase of non-automotive retail sales since December.

The index of residential construction continued to accelerate in January (+13.53%), likely securing an increase in activity in the first quarter. While most of the recent upturn of this indicator had originated in single-family housing in central Canada, the recovery now seems to be spreading to other types of housing and to other regions at the start of the first quarter. Despite this considerable improvement in the non-filtered version of the residential construction index in absolute terms, comparable to the strong recovery of 1975, the index remains about 25% below its peak of April 1981.

The signs of recovery were less vigorous in manufacturing, as indicated by the relatively weak contribution of this sector to the increase in the composite index in January. The downward trend of new orders for durable goods slowed to -0.49% in January, while the ratio of shipments to

Trusteed Pension Funds

Quarterly Estimates of Assets Held



Source: Statistics Canada, Quarterly Estimates of Trusteed Pension Funds (74-001)

Trusteed Pension Funds

The book value of assets held in trusteed pension funds reached an estimated \$71.4 billion at the end of the fourth quarter of 1982, an increase of \$3.1 billion from the previous quarter and \$9.9 billion more than the amount held one year earlier.

Income of these funds for the fourth quarter of 1982 — made up of employee and employer contributions of \$1.9 billion, investment income of \$1.8 billion and other income of \$170 million — amounted to \$3.9 billion. Out of this revenue, expenditures of \$877 million were met, leaving a net cash flow of \$3.0 billion.

For further information, order the fourth quarter 1982 issue of *Quarterly Estimates of Trusteed Pension Funds* (74-001, \$2.65/\$10.60), or contact Hubert Frenken (613-995-4476), Pensions Section, Labour Division, Statistics Canada, Ottawa K1A 0T6.

Telephone Statistics

Canada's 13 major telephone systems reported revenues of \$642.4 million in February 1983, up 6.3% from a year earlier. Operating expenses at \$455.1 million showed an increase of 4.3%. Net operating revenue totalled \$187.4 million, up 11.4% over February 1982.

finished goods rose to 1.37 from the low levels recorded over the prior six months. These two indicators registered strong increases in the non-filtered version of +14.9% for new orders and +0.11 for the ratio of shipments to stocks. These indicators rose sharply due to industries related to household and export demand, although this movement has not been sufficiently large to slow markedly the steady downward trend of business investment.

For further information, order *Current Economic Analysis* (13-004E, Canada: \$2.65/\$26.50; Other Countries: \$3.20/\$31.80), or contact D. Rhoades (613-992-4441), Current Economic Analysis Division, Statistics Canada, Ottawa K1A 0T6.

Manufacturing Activity

Preliminary estimates show the value of new orders received in all Canadian manufacturing industries in February 1983, seasonally adjusted, increased 3.1% to \$15,659.5 million from the revised estimate of \$15,182.8 million in January. In durable goods industries, new orders at \$6,468.7 million were 3.1% higher than the January value of \$6,271.4 million; most of the increase reflected gains of \$71.4 million (+12.5%) in the electrical products industry and \$40.5 million (+11.7%) in the machinery industry. In non-durable goods industries, new orders received totalled \$9,190.8 million, up 3.1% from \$8,911.4 million (revised) in January.

The seasonally adjusted preliminary estimate of the value of the unfilled orders backlog at the end of February was \$16,942.1 million, up 0.7% from the revised January estimate of \$16,817.3 million.

The seasonally adjusted preliminary estimate of the value of manufacturers' shipments in February was \$15,534.7 million, up 1.6% from January's revised value of \$15,293.6 million. Shipments of durable goods industries were up 0.1% to \$6,380.5 million from \$6,375.1 million as a 7.5% gain in the wood industry group was partly offset by a 5.3% loss in the electrical products industry group. A \$145.9 million increase in the foods and beverages industry group was the major contributor to a 2.6% gain in the non-durable goods industries as shipments rose to \$9,154.2 million in February from \$8,918.4 million in January.

Seasonally adjusted inventory owned by manufacturers at the end of February was \$31,796.7 million, up 0.1% from the preceding month's revised value of \$31,755.3 million.

The seasonally adjusted ratio of total inventory owned to shipments at the end of February was 2.05:1, down from 2.08:1 in January. The ratio of finished products to shipments remained unchanged at 0.71:1.

Not adjusted for seasonal variation, manufacturers' shipments in February 1983 were estimated at \$14,613.9 million. Cumulative shipments for the first two months of 1983 at \$28,443.8 million were up 0.6% from the \$28,267.6 million January-February 1982 level.

For further information, order the February 1983 issue of *Inventories, Shipments and Orders in Manufacturing Industries* (31-001, \$3.70/\$37), or contact H.D. Wightman (613-996-7008), Shipments, Inventories and Orders Section, Manufacturing and Primary Industries Division, Statistics Canada.

Gas Utilities

Preliminary data show Canadian sales of natural gas amounted to 5 190 million cubic metres in January 1983, a drop of 5% from 5 463 million cubic metres a year earlier.

Exports of natural gas to the United States were reported at 2 428 million cubic metres in the latest month, down 1.5% from 2 464 million cubic metres in January 1982.



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