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July 8, 1983

Trade

Preliminary results indicate exports (seasonally adjusted, balance-of-payments basis) decreased 3.2% or $250 million to $7.4 billion in May 1983 following an increase of 9.9% in April and a decrease of 1.2% in March. Imports increased 1.6% or $90 million to $5.8 billion in May after an increase of 1.6% in April and a decrease of 0.5% in March. The merchandise trade surplus pulled back $340 million to $1.6 billion in May from the record monthly surplus of $2.0 billion in April. The cumulative merchandise trade surplus for the first five months of 1983 at $7.6 billion was $1.1 billion higher than the $6.5 billion surplus recorded in the January-May 1982 period.

Short Term Trend

The export trend, which had reached a low point in December 1982, increased 1.1% in January, 1.9% in February, and 2.1% in March. Imports, which picked up one month earlier than exports, increased at a faster pace — up from a 0.8% increase in December 1982 to one of 2.5% in February — and then slowed by registering a 2.0% increase in March.

As a result, the merchandise trade surplus, which had retracted at a rate of $60 million a month in November and December 1982, decreased only marginally in February and increased $35 million to $1.5 billion in March.

Commodity Analysis

Exports (Seasonally Adjusted), Customs Basis

In May 1983, the largest decreases in exports were for chemicals (down 16% or $65 million to $350 million) and iron ores, concentrates and scrap (down 44% or $60 million to $75 million, following an increase of $35 million in April). The largest increases were for passenger cars (up 20% or $145 million to $850 million), wheat (up 17% or $95 million to $655 million after a $115 million increase in April) and for lumber products (up 15% or $55 million to $405 million).

Short Term Trend

After the November 1982 low point, the pickup in end product exports (36.4% share of domestic exports) slowed slightly in March. This was mainly attributable to motor vehicle products (23% share) and telecommunication equipment exports (1.8% share) which both followed the same

(continued on next page)

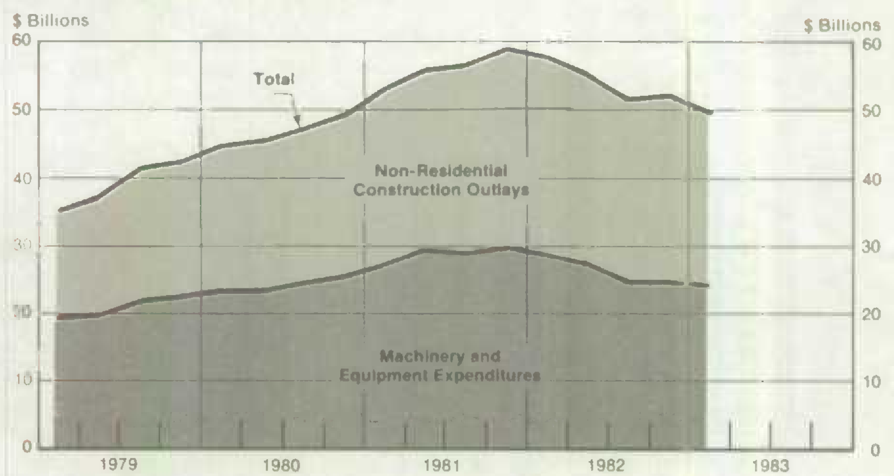
LATEST MONTHLY STATISTICS

			Previous Month	% Change From Year Ago
EMPLOYMENT, INCOME				
Average Weekly Earnings ($)	Mar.	409.80p	407.13p	6.6
Labour Income ($ million)	Mar.*	17,499.9	17,103.9	2.8
Persons with Jobs (million)	May	10.69	10.33	-0.1
Unemployed	May	1,493,000	1,570,000	20.3
INVENTORIES				
Department Store ($ million)	Apr.	3,261.6	3,052.1	-2.2
Manufacturers' Owned ($ million)	Apr.	31,759.1p	31,846.1r	-8.2
ORDERS				
Manufacturers' New Orders ($ million)	Apr.	15,868.1p	16,762.3r	3.8
Manufacturers' Unfilled Orders ($ million)	Apr.	17,218.3p	17,192.3r	-8.8
PRICES				
Consumer Price Index (1981=100)	May	116.1	115.8	5.4
New House Price Index (1976=100)	Apr.	129.8	129.6	-3.8
Raw Materials Price Index (1977=100)	May*	211.6p	211.3p	5.5
Excl. coal, crude oil, nat. gas	May*	153.8p	153.2p	-0.3
Industry Selling Price Index (1971=100)	May*	298.5p	297.0p	3.4
CONSTRUCTION			***Year-to-date***	
Building Permits ($ million)	Apr.*	1,514.0p	*4,449.3p*	*11.7*
Housing Starts — Urban Centres (units)	Apr.	12,413	*35,991*	*1.9*
ENERGY				
Coal Production (thousand tonnes)	Mar.*	3 490	*10 709*	*-2.2*
Electricity Generation (terawatt hours)	Mar.	34.8	*105.3*	*-3.4*
Natural Gas Production (million cubic metres)	Mar.	8 455.1	*26 862.8*	*-6.8*
Petroleum Refining (million cubic metres)	Apr.	5.4p	*26.4p*	*-10.1*
FOREIGN TRADE				
Exports — Balance of Payments Basis ($ million)	Apr.	7,418p	*28,063p*	*2.1*
Imports — Balance of Payments Basis ($ million)	Apr.	6,019p	*22,598p*	*-2.8*
PRODUCTION				
Railway Carloadings (million tonnes)	May	18.1p	*79.8p*	*-10.1*
Steel (ingots — thousand tonnes)	Mar.	1 079.7p	*2 659.6p*	*-27.3*
SALES				
Department Store Sales ($ million)	Apr.	775.3	*2,790.4*	*4.9*
Manufacturers' Shipments ($ million)	Apr.	15,842.1p	*61,102.1p*	*1.3*
New Motor Vehicle Sales ($ million)	Apr.	1,244.8	*3,644.4*	*11.4*
Retail Sales ($ million)	Apr.	8,371.0p	*30,218.4p*	*5.2*

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

Business Investment in Plant and Equipment

Data Seasonally Adjusted at Annual Rates



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

Canada

pattern. Categories such as other equipment and tools (1.9% share), office machinery and equipment (1.1% share) and agricultural machinery (0.6% share) were still on an upward trend in recent months up to March. However, other transportation equipment including aircraft (1.8% share), after an August 1982 peak continued to decline at a faster pace, while industrial machinery exports (2.3% share) continued to decrease but at a slower pace.

Imports (Seasonally Adjusted), Customs Basis

The largest increases posted for imports in May 1983 were for motor vehicle parts (up 8% or $75 million to $1 billion, following a $140 million increase in April) and hardware (up 70% or $65 million to $155 million). There was a second significant decline recorded for crude petroleum (down 67% or $140 million to $70 million, after an $80 million decrease in April); this brings the total decline from the $825 million May 1981 peak to $760 million. Crude petroleum imports are now at less than one-tenth of the peak level.

Short Term Trend

The trend for end products (63.1% share of imports) reached a low point in November 1982, increased at a faster pace up to February and slowed in March partly as a result of motor vehicle product imports (25.7% share). Other contributors to this pattern included telecommunication equipment (4.3% share), office machinery and equipment (4.0% share) and other equipment and tools (6.5% share). Imports of other transportation equipment, including aircraft (3.7% share), after a December 1982 low point, continued to increase at a faster pace. Agricultural machinery (1.9% share), after a drop of 48% spread over 19 months, picked up again in March and reached a level of $105 million. The decline in the import trend of industrial machinery (6.8% share) slowed from 2.6% in November 1982 to 0.5% in March 1983.

Trading Partner Analysis

Exports (Seasonally Adjusted), Customs Basis

The only major movement in May exports was a 5.3% increase or $280 million in exports to the United States to $5,540 million, following a $265 million advance in April. Exports to other destinations fluctuated only marginally.

Short Term Trend

The recent turnaround in exports is mainly attributable to higher exports to the U.S. (72.0% share), to Japan (5.3% share) and to "Other America" countries (3.5% share). Exports to the United Kingdom (2.9% share) continued to increase but at a slower pace. Exports to "Other EEC" (4.6% share) and "Other OECD" (1.9% share) countries registered smaller declines in the three months up to March 1983.

Imports (Seasonally Adjusted), Customs Basis

The only significant change in imports for May 1983 was for imports from "Other America" countries — down 20% or $65 million to $265 million. Imports from all other destinations recorded only marginal fluctuations.

Short Term Trend

After a low point in November 1982, imports increased at a faster pace up to February and at a slower pace in March; this was mainly attributable to imports from the U.S. (72.6% share) and from Japan (5.7% share). Imports from "Other EEC" (5.4% share) and from "Other OECD" (2.9% share) countries, after a low point reached in the fourth quarter of 1982, continued to cover further ground. Declines in imports from the U.K. (2.1% share) and from "Other America" countries (5.3% share), which had increased at a faster pace, slowed somewhat in March.

For further information, order the May 1983 issue of Summary of External Trade (65-001, $3.15/$31.50).

Building Permits

Building permits issued in April 1983 rose 2.4% to a preliminary seasonally adjusted level of $1,346.1 million from $1,315.0 million (revised) in March, reflecting a surge of last minute applications for the $3,000 grant under the Canadian Home Ownership Plan (CHOSP) which ended May 5. However, the surge in residential permits was almost entirely offset by a drop in permits for non-residential building construction. In April 1982, the total value of permits issued was $1,038.6 million.

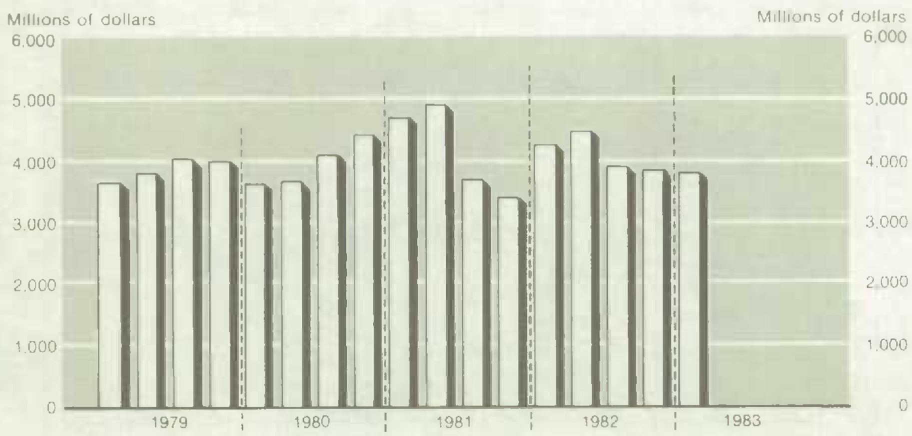
The value of builders' applications for new housing construction was estimated at a seasonally adjusted $1,003.5 million in April, up 11.7% from $898.3 million in March. The number of new dwellings authorized rose to 18,330 units in April (13,066 singles and 5,264 multiples) from 16,775 units in March (10,073 singles and 6,702 multiples). The April value of residential permits was more than double the year-earlier estimate of $450.1 million.

Permits for building construction other than residential decreased for the third consecutive month in April, reflecting the weakness of intentions in the non-residential sector. The value of permits for industrial projects rose a marginal 3.9% to $61.5 million from the depressed level of $59.2 million in March, while commercial projects were up 2.9% to $199.2 million from $193.6 million. Institutional projects tumbled 50.0% to $81.9 million from $163.9 million in March. In total, non-residential permits amounted to $342.6 million, off 17.8% from the $416.7 million authorized in March.

For additional information, order the April 1983 issue of Building Permits (64-001, $3.70/$37), or contact R. Couillard (613-995-8213), Construction Division, Statistics Canada, Ottawa K1A 9Z9.

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)

Realized Net Farm Income, 1983 Outlook

Realized net farm icome is expected to increase 5% in 1983 to $3.7 billion from $3.5 billion in 1982. This is the result of stale cash receipts combined with a small decrease in farm expenses.

The outlook incorporates information available to June 30, 1983. Users are cautioned that market conditions may change substantially during the next six months. As a result, the forecast may deviate from the assumptions contained in today's projections. Users are urged to contact the analysts named below if they suspect that this is the case.

For additional details and information contact Phil Jensen (613-995-4895), Agriculture Statistics Division, Statistics Canada, Ottawa K1A 0T6, or Fu-Lai Tung (613-995-9554), Farm Income Analysis Section, Production Development Policy Directorate, Agriculture Canada, Ottawa K1A 0C5.

Raw Materials Price Index

The Raw Materials Price Index (1977=100) was at a preliminary level of 211.6 in May 1983, an increase of 0.1% from 211.3 (revised) in April and up 5.5% from the May 1982 index level. The raw materials price index excluding coal, crude oil and natural gas increased 0.4% over the month but was still 0.3% lower than a year earlier.

The vegetable products component index advanced 4.3% in May — largely on the strength of sharp price increases for raw sugar (38%), fresh vegetables (9%) and fresh fruit (8%) — but was still down 1.9% from the year-earlier level. Despite the increases in May, the fruit and vegetable indexes remained 20% lower than in May 1982.

The non-ferrous metals component rose 2.7% in the latest month and showed an increase of 21.5% over the 12-month period. While significant price increases for precious metals provided the main impetus to the monthly change, notable advances were also posted for copper, zinc and non-ferrous scrap.

The animals and animal products index decreased 1.6% in May, mainly because of declines in cattle and calf prices which were only partially offset by price increases for hides, skins, sheep and lambs. Since May 1982, the component index has declined 6.2%.

For further information, order the May 1983 issue of Industry Price Indexes (62-011, $3.70/$37), or contact the Information Unit (613-995-5738), Industrial Prices Section, Prices Division, Statistics Canada, Ottawa K1A 0V5.

The Dairy Review

Milk sold from Canadian farms for all purposes in April 1983 totalled an estimated 645 111 kilolitres, 0.4% less than in April 1982. This brought the total estimate of milk sold off farms during the first four months of 1983 to 2 342 196 kilolitres, an increase of 1.1% over the January-April 1982 period.

For further information, order the May issue of The Dairy Review (23-001, $2.65/$26.50), or contact Paul Murray (613-995-4853), Agriculture Statistics Division, Statistics Canada, Ottawa K1A 0T6.

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Industry Selling Price Index

The Industry Selling Price Index (ISPI) for manufacturing (1971=100) reached a preliminary level of 298.5 in May 1983, up 0.5% from the revised April index of 297.0. The year-to-year increase from May 1982 to May 1983 was 3.4%, marking the fifth consecutive month in which the rise has been less than 4%.

The wood industries index advanced 6.2% in May and showed a year-over-year rise of 16.4%. The sawmills and planing mills index climbed 9.6% in the month as lumber prices posted strong increases, ranging from 1.1% for maple to 21% for spruce; the increases occurred in both the domestic and export markets. Other construction materials showed strong price increases as well.

The primary metal industries index advanced 0.7% in May, to stand 3.8% higher than the year-earlier level. Price increases of 1.0% in the smelting and refining industry provided the main stimulus for the increase in the group index.

The food and beverage industries index increased 0.3% in the latest month to a level 2.3% higher than in May 1982. The slaughtering and meat processors component index was down 1.0% — mainly in response to lower beef prices — and the fish products industry index declined 4.1%; however, these decreases were more than offset by increases of 17.6% in the cane and beet sugar processors index, 4.4% in the confectionery manufacturers index and 2.3% in the feeds industry index.

For further information, order the May 1983 issue of Industry Price Indexes (62-011, $3.70/$37), or contact the Information Unit (613-995-5738), Industrial Prices Section, Prices Division, Statistics Canada, Ottawa K1A 0V5.

Labour Income

Labour income for March 1983 was estimated at $17,499.9 million, an increase of $475.8 million or 2.8% from March 1982.

Adjusted for seasonal variation, wages and salaries increased by $255.0 million between February and March 1983 to $16,103.7 million.

The estimates will be published in the January-March 1983 issue of Estimates of Labour Income (72-005, $5.30/$21.20). For further information, contact G. Gauthier (613-995-8431), Labour Income Section.

Vehicle Register, 1982

Canada's provincial and territorial governments reported 10,530,355 passenger automobile registrations during the 1982 licence year. Registrations of trucks and buses totalled 3,293,406 and motorcycles numbered 431,453. The total number of driver licences registered for the 1982 licence year was 15,081,076.

For further information, contact A. MacLean (613-996-9271), Transportation and Communications Division, Statistics Canada.

GDP by Industry

Gross Domestic Product, in constant 1971 prices, continued to gain momentum in April rising $608 million (0.5%) above March and 3.0% above the October low point. The April increase in GDP originated largely in manufacturing, finance industries, and construction. Industrial production recorded a large advance of 1.7% during the month, raising output 0.4% above the April 1982 level. This marked the first time that industrial production has been above the same month of the previous year in 19 months.

From December 1982 to April, manufacturing activity has rebounded 10.6%, recapturing almost one-third of the drop in output experienced during the last recession. The gain in April was 2.0% and resulted mainly from increased production of motor vehicles, metal fabricated products, primary metals, chemicals, wood products and textiles.

The increase in motor vehicle manufacturing was due to stepped-up production of passenger cars and trucks for the Canadian and export markets — exports of vehicles increased substantially in April while domestic sales by new motor vehicles dealers have been edging up modestly every month since January. New car sales for North American built vehicles increased for the second consecutive month while sales of overseas-produced autos were down in both March and April. The market share for North American built vehicles in April was 79%, about 9% above the average share in the December-March period. Advance weekly production data suggest that motor vehicle production should increase again in May.

The notable weak spot in the April economic picture was in retail trade, where a sizeable decline was reported, with particular weakness among food, department stores, clothing, shoe and drug stores.

For further information, order the April 1983 issue of Gross Domestic Product by Industry (61-005, $3.70/$37), or contact R. Kennedy (613-995-0568), Statistics Canada, Ottawa K1A 9Z9.

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	Catalogue No.	In Canada: Price per issue/year	Elsewhere: Price per issue/year
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Farm Energy Use, 1982	21-519	$8.45	$10.15
Grain Trade of Canada, 1981-82	22-201	$8.45	$10.15
Production and Stocks of Eggs and Poultry, April 1983	23-003	$2.65/$26.50	$3.20/$31.80
CURRENT ECONOMIC ANALYSIS			
Current Economic Analysis, May 1983	13-004	$2.65/$26.50	$3.20/$31.80
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Culture Statistics: Museums, Art Galleries and Related Institutions, 1979	87-516	$6.35	$7.60
SERVICE BULLETIN			
Science Statistics — Vol. 7, No. 6, Regional Distribution of Federal Expenditures on Science and Technology, 1981-82	13-003	$1.55/$15.50	$1.85/$18.60
EXTERNAL TRADE			
Imports by Commodities, April 1983	65-007	$5.30/$53	$6.35/$63.60
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Bakeries, 1981	32-203	$4.75	$5.70
Confectionery, Quater Ended March 1983	32-027	$2.65/$10.60	$3.20/$12.70
Crude Petroleum and Natural Gas Production, March 1983	26-006	$2.65/$26.50	$3.20/$31.80
Domestic Refrigerators and Freezers, May 1983	43-001	$1.55/$15.50	$1.85/$18.60
Domestic Washing Machiens and Clothes Dryers, May 1983	43-002	$1.55/$15.50	$1.85/$18.60
Electric Lamps (Light Sources), May 1983	43-009	$1.55/$15.50	$1.85/$18.50
Electric Power Statistics, March 1983	57-001	$2.65/$26.50	$3.20/$31.80
Machine Shops, 1981	42-207	$4.75	$5.70
Manufacturers of Electrical Industrial Equipment, 1981	43-207	$4.75	$5.70
Mineral Wool Including Fibrous Glass Insulation, May 1983	44-004	$1.55/$15.50	$1.85/$18.60
Printing, Publishing and Allied Industries, 1981	36-203	$6.35	$7.60
Production, Shipments and Stocks on Hand of Sawmills in British Columbia, April 1983	35-003	$1.55/$15.50	$1.85/$18.60
Sash, Door and Other Millwork Plants, 1981	35-205	$6.35	$7.60
Shipments of Plastic Film and Bags Manufactured from Resin, Quarter Ended March 31, 1983	47-007	$2.65/$10.60	$3.20/$12.70
Specified Domestic Electrical Appliances, May 1983	43-003	$1.55/$15.50	$1.85/$18.60
The Sugar Situation, May 1983	32-013	$1.55/$15.50	$1.85/$18.60
MERCHANDISING AND SERVICES			
New Motor Vehicle Sales, April 1983	63-007	$2.65/$26.50	$3.20/$31.80
Retail Trade, March 1983	63-005	$3.70/$37	$4.45/$44.40
PRICES			
Construction Price Statistics, June 1983	62-007	$3.15/$31.50	$3.80/$37.80
PUBLIC FINANCE			
Provincial Government Enterprise Finance, Fiscal Years Ended Nearest to December 31st, 1980	61-204	$8.45	$10.15
TRANSPORTATION AND COMMUNICATIONS			
Railway Freight Traffic, Year Ended December 31, 1982	$10.60	$12.70	