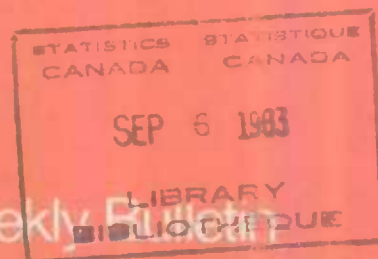


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Weekly Bulletin



Friday, September 2, 1983

## Gross National Product

Gross National Product at market prices rose 2.5% in the second quarter to a level of \$384.4 billion, seasonally adjusted at annual rates. After allowing for a small quarterly increase in the overall price deflator of 0.7%, real GNP rose 1.8%.

The recovery of economic activity maintained the momentum established in the first quarter and became more widespread as increases were recorded for all major categories of final demand except government expenditure and non-residential construction. This was reflected in an acceleration in employment growth as Labour Force Survey employment rose 1.4% in the second quarter after advancing only 0.2% in the first. The major source of strength in the second quarter was export demand as merchandise exports rose 8.8% in real terms. This was largely attributable to the robust 2.2% increase in real GNP in the United States in the second quarter as nearly 70% of the increase in merchandise exports was accounted for by increased shipments to the U.S. The rate of growth of the volume of final domestic demand rose in the second quarter, to an increase of 1.7%. Gross fixed capital formation rose 4.5% in volume due to strong increases in residential investment and a pick-up in business spending on machinery and equipment. Despite the diffuse nature of the recovery in final demand, production did not recover as rapidly and the stock of business non-farm inventories was reduced by a further \$1.8 billion at annual rates. There has now been a cumulative decline of over 1.4% in the volume of business inventories since the fourth quarter of 1981.

The merchandise trade surplus increased by \$0.8 billion to \$5.2 billion in volume. The strength in international demand was spread across commodity groups, as an acceleration of trade in crude and fabricated materials offset a slowing in the rate of increase of motor vehicle product exports. Personal expenditure rose 1.4% in volume in the second quarter following a 0.9% increase in the first. As in the previous two quarters, much of the increase in consumer demand was for durable goods. Residential investment recorded its third consecutive rapid quarterly increase, up 25.9% in

(continued on next page)

## LATEST MONTHLY STATISTICS

### EMPLOYMENT, INCOME

Average Weekly Earnings (\$)	Mar	410.85p		
Labour Income (\$ million)	Apr.	17,709.4p	17,459.6p	3.0
Persons with Jobs (million)	July	11.18	10.98	1.6
Unemployed	July	1,409,000	1,452,000	1.7

### INVENTORIES

Department Store (\$ million)	June	2,981.4	3,235.3	2.4
Manufacturers' Owned (\$ million)	June	29,861.0p	30,323.0p	-3.8

### ORDERS

Manufacturers' New Orders (\$ million)	June	17,968.4p	17,154.7p	6.2
Manufacturers' Unfilled Orders (\$ million)	June	16,272.7p	16,528.3p	0.5

### PRICES

Consumer Price Index (1981=100)	July	117.9	117.4	5.5
New House Price Index (1976=100)	June	130.2	129.9	-2.2
Raw Materials Price Index (1977=100)	July*	210.1p	210.6p	2.7
Excl. coal, crude oil, nat. gas	July*	151.5p	152.2p	0.5
Industry Selling Price Index (1971=100)	July*	300.8p	299.6p	3.6

### CONSTRUCTION

Building Permits (\$ million)	May	1,266.8p	5,854.8p	16.1
Housing Starts — Urban Centres (units)	June	16,354	74,902	41.6

### ENERGY

Coal Production (thousand tonnes)	May	3,739	17,878	-4.2
Electricity Generation (terawatt hours)	May	29.8	166.2	-1.5
Natural Gas Production (million cubic metres)	May*	6,947.8	41,423.6	-6.7
Petroleum Refining (million cubic metres)	June	7.0p	39.4p	-12.3

### FOREIGN TRADE

Exports — Balance of Payments Basis (\$ million)	June	8,231p	44,206p	3.3
Imports — Balance of Payments Basis (\$ million)	June	6,280p	34,986p	0.6

### PRODUCTION

Railway Carloadings (million tonnes)	July	15.3p	113.8p	-8.4
Steel (ingots — thousand tonnes)	July	1,012.3p	6,981.0p	-9.3

### SALES

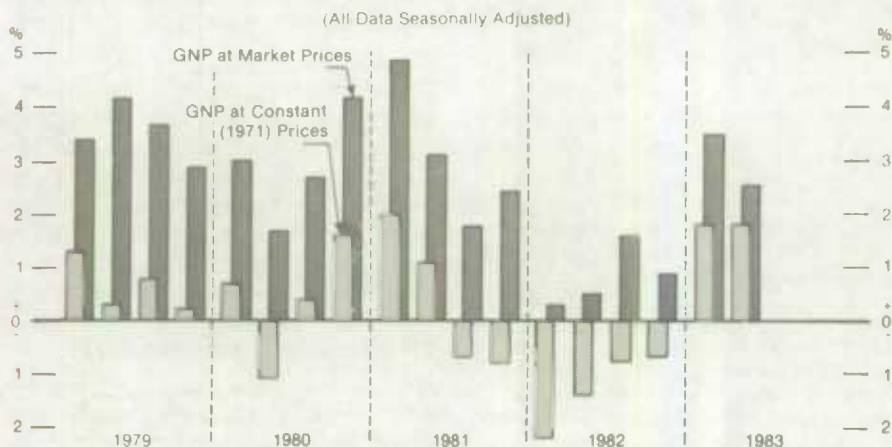
Department Store Sales (\$ million)	June	920.2	4,550.8	6.7
Manufacturers' Shipments (\$ million)	June	18,224.1p	96,649.9p	3.6
New Motor Vehicle Sales (\$ million)	June	1,251.5	6,083.1	13.1
Retail Sales (\$ million)	June	9,472.6p	48,494.1p	6.0

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)



volume in the second quarter. Rate of decline in the volume of business fixed investment in plant and equipment slowed to a drop of 0.6% in the second quarter. The deceleration was largely the result of a 2% upturn in expenditures on machinery and equipment, reflecting higher motor vehicle sales, following five consecutive quarterly declines. The volume of non-farm business inventories was reduced a further \$1.8 billion in the second quarter, a rate of decline similar to that of the first quarter. Wages, salaries and supplementary labour income rose 2.7% in the second quarter, following an increase of only 0.4% in the first quarter. Corporate profits rose 9.9% in the second quarter, bringing the cumulative increase to 56% since the trough of the third quarter of 1982.

*For further information, order the Second Quarter 1983 issue of System of National Accounts: National Income and Expenditure Accounts (13-001, \$6.35/\$25.40).*

## Unemployment Insurance

Unemployment insurance benefits paid out in June 1983 amounted to \$785 million, a decrease of 16% from the previous month, but up 16% from the \$674 million disbursed in June 1982. Payments for the first six months of 1983 climbed 43% from the same period last year to reach \$5,851 million.

Claims for unemployment insurance benefits received in June rose 6% to 242,000 from the 228,000 reported in May. For the first half year of 1983, the number of claims received declined 9% to 1.624 million from 1.791 million in the year-earlier period.

The number of unemployment insurance beneficiaries declined 10% in June to 1.125 million from 1.256 million in May. Compared with June 1982, beneficiaries increased by 9%.

*For further information, order the March 1983 issue of Statistical Report on the Operation of the Unemployment Insurance Act (73-001, \$6.35/\$25.40).*

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## Energy Statistics by Selected Energy Forms

Preliminary figures show that during the first half of 1983, Canada's foreign trade in energy commodities showed an increased surplus, compared with the same period in 1982.

### Crude Oil and Petroleum Products

During the first six months of 1983, Canadian oil production amounted to 38 924 megalitres, up 6% from the year-earlier period. This increase was made possible by strong external demand: exports increased by 2 543 ML (+48%) to total 7 834 ML. In contrast, oil imports were slashed in half — to 5 445 ML; this latter decrease resulted from the slowdown in activities at refineries in Quebec and the Atlantic Provinces.

Production of petroleum products by Canadian refineries declined by more than 10% during the first half of 1983. Sales figures for refined petroleum products showed about the same decrease (-11%); most of the sales decrease was recorded during the winter months, while in May and June 1983 sales were down by -2.3% and -5.2%, respectively. Changes observed in the crude oil trade balance also occurred for refined petroleum products: exports of these products effectively increased by 29%, while imports decreased by 31%. Thus, the energy trade balance for crude oil and petroleum products was positive during the first half of 1983 by 4 687 ML, while during the same period a year earlier this balance was negative by 4 341 ML. This important turnaround was highly beneficial to the Canadian trade balance.

### Natural Gas

As a result of lower sales recorded in the first four months of 1983, sales of natural gas for January to June 1983 decreased by 8%. Mild weather during the winter slowed demand for heating purposes, while increased industrial activity led to higher sales during May and June. Exports totalled 10 328 gigalitres, down 9% from the first half of 1982. Overall, Canadian natural gas production decreased by 8% to 41 872 GL.

### Electricity

During the first half of 1983, electricity generation reached 195 074 gigawatt hours, about the same level recorded during the January-June 1982 period. However, electricity generation was down during the first three months of 1983 but higher in April, May and June than during the same months of 1982. Exports increased by 23% to 18 012 GW.h, representing 9% of Canadian electricity generation.

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

## Composite Leading Index

News of what the latest leading indicators have to say will be available between September 13 and 20. This June data will be accompanied by July or August key economic series updates based on the following schedule:

**Inventories, Shipments and Orders**, September 15 to 21;

**The Consumer Price Index**, September 20;

**Current Economic Analysis, Monthly Review**, September 20 to 27;

**Gross Domestic Product (Industrial Production)**, September 21 to 27;

**Employment, Earnings and Hours**, September 22 to 30;

**Gross Domestic Product by Industry**, September 23 to 29;

**Housing Starts in Centres of 10,000 Population and Over**, September 26 to 30;

**Unemployment Insurance**, September 26 to October 4;

**Industry Selling Price Index**, September 28 to October 4;

**Building Permits**, September 28 to October 6.

*For further information, contact Jack Kerr (613-992-1548).*

## Staff: Community Colleges/Vocational Schools, 1981-82

Educational staff in Canadian community colleges in the fall of 1981 numbered 24,380, a 1% increase over the previous year and up 13% from the fall of 1976. Women continued to account for approximately 30% of the total educational staff in the country in 1981.

For those colleges reporting in 1981, the median salary of educational staff at the postsecondary level was \$33,000, up over 13% from 1980 and a 57% rise from 1976. Trades-level educational staff had a 1981 median salary of \$30,400, an increase of 14% over 1980 and up 59% from 1976.

The median ages of male and female educational staff at the postsecondary level in 1981 were 42 years and 39 years, respectively, an increase of one year for each since 1980.

*For further information, order the 1981-82 issue of Educational Staff of Community Colleges and Vocational Schools (81-254, \$7.40).*

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## Crude Petroleum/Natural Gas

Production of crude petroleum and equivalent hydrocarbons in May amounted to 6 216 200 cubic metres, up 2.3% from a year earlier. Alberta was the main producer with 83.3% of the total. Imported crude and equivalents for the same month amounted to 458 200 cubic metres; crude oil and equivalents exported to the United States reached 1 274 100 cubic metres.

Canadian refineries received 5 179 400 cubic metres of crude petroleum and equivalents in May 1983.

Net new production of natural gas in May 1983 amounted to 6 947.8 million cubic metres, down 5.2% from 7 332.4 million cubic metres in May 1982. Alberta produced 91.2% of the total. Exports to the U.S. were reported at 1 357.9 million cubic metres.

For further information, order the May 1983 issue of *Crude Petroleum and Natural Gas Production* (26-006, \$2.65/\$26.50), or contact Richard Godin (613-996-3139), Energy Section, Manufacturing and Primary Industries Division, Statistics Canada, Ottawa K1A 0T6.

## Sales of Alcoholic Beverages

Sales of alcoholic beverages in Canada reached \$6,214 million in the fiscal year ended March 31, 1982, up \$873 million or 16.4% from the previous year. Sales volume increased 3.9% to 2 508 million litres in 1981 from 2,412 million in 1980. (It should be noted that the increase arose mainly because the 1980 sales in Alberta covered nine months only due to a change in fiscal year-end.)

Imports of alcoholic beverages increased to \$336 million in 1981 from \$311 million in 1980, while the value of exports increased to \$457 million from \$410 million.

Provincial government revenues from sales of alcoholic beverages rose 19.1% from the preceding year to \$1,958 million in 1981.

Further information will be contained in *The Control and Sale of Alcoholic Beverages in Canada, 1981* (63-202, \$4.75).

## Local Government Finance, 1980

Total general revenues raised by local governments in Canada in 1980 were \$27,266 million. Own source revenues — real property and other taxes, sales of goods and services, licences, permits and other charges — amounted to \$14,061 million or 51.6% of total general revenue. Transfers from other governments and their enterprises amounted to \$13,206 million or 48.4% of total revenue; the significant portions of these transfers were the specific purpose transfers from provincial and territorial governments amounting to \$11,136 million.

General expenditures of local governments reached \$28,071 million in 1980. Education expenditures at \$11,611 million accounted for 41.4% of the total expenditure. Expenditure on transportation and communications represented 11.8%, environment 8.5%, protection of persons and property 7.6%, debt charges 7.1% and recreation and culture 6.3%.

Further details of these and other financial management statistics of local governments will be published in *Local Government Finance Actual, 1980* (68-204). Pending publication, information can be obtained from G.A. Marr (613-995-9897), Local Government Section, Public Finance Division, Statistics Canada, Ottawa K1A 0T6.

## Corrugated Boxes

Manufacturers shipped 133 421 000 square metres of corrugated boxes and wrappers in July, an increase of 9.4% from 122 002 000 square metres a year earlier.

January to July shipments totalled 987 571 000 square metres, down from 1 011 021 000 square metres in 1982.

For further information, order the July 1983 issue of *Shipments of Corrugated Boxes and Wrappers* (36-004, \$1.55/\$15.50), or contact Gerry W. Barrett (613-992-0388), Manufacturing and Primary Industries Division, Statistics Canada, Ottawa K1A 0T6.

## Current Economic Review

The rate of recovery of economic activity for the second quarter appears to be about on a level with the 1.8% gain in real Gross National Product posted in the first quarter. Strong gains in residential construction and in export demand by all the major industrial trading partners led the increase. The recovery in consumer demand was less pronounced, although there are indications that the ongoing decline in business investment has begun to stabilize. Inflation remained at moderate levels as small increases in consumer and industrial prices were reinforced by lower prices for imported goods.

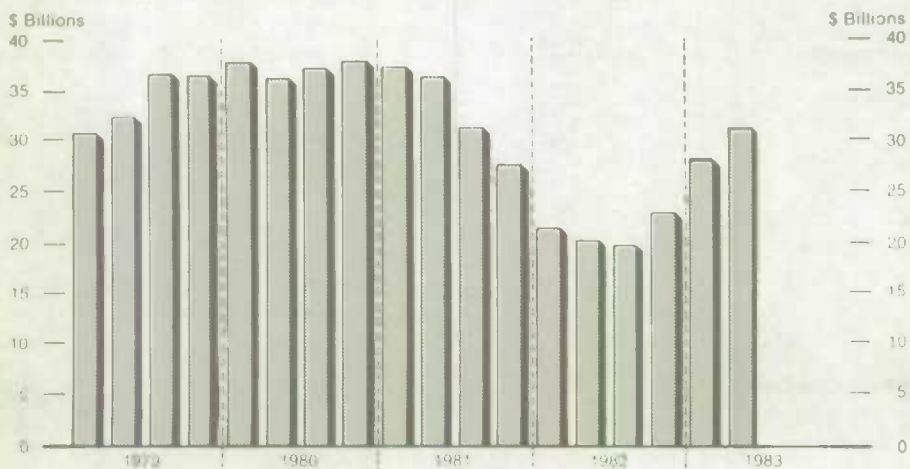
There are some key relationships in the economy that have been atypical for a cyclical recovery, and which may begin to slow the pace of the upturn in the remainder of the year. In particular, the growth of disposable incomes has been weaker than the average for prior recoveries. In part this reflects the emphasis placed by firms on improving productivity and profit margins with the result that employment has grown more slowly than output over the first half of the year. Moreover, much of the increase in employment has been part-time, and along with a steady slowdown in hourly earnings has also contributed to the weakness in real disposable income, which has declined slightly since the third quarter of 1982 compared to a post-war average increase of 6.6% at annual rates in the first six months of recovery. In contrast, corporate profits have recovered at a rapid rate from the historically weak share of GNP attained at the trough of the recession. Firms have benefitted from the increases in output-per-person employed to rebuild profit margins while maintaining relative price stability, and have begun to direct funds to the repaying of debt and the increase of investment in machinery and equipment. A cautious attitude to outlays for current production is evident in the restraint in new hiring and in the unusually widespread build-up of manufacturing unfilled orders.

The cyclical increase in businesses' share of incomes is apparently beginning to lead to a shift in the sources of growth of final demand from the household to the business sector. The signs of a slackening in household demand for retail goods and housing are evident in the softening of housing starts and auto sales in June and July in both Canada and the United States. Output has begun to slip in some household-oriented manufacturing industries, while a slackening of consumer demand is also detectable in the import data.

For the detailed analysis as well as a news summary of major domestic and international developments and extensive analytical charts and tables, order *Current Economic Analysis* (13-004E, Canada: \$2.65/\$26.50; other countries: \$3.20/\$31.80). For further information, contact D. Rhoades (613-992-4441), Current Economic Analysis Division, Statistics Canada, Ottawa K1A 0T6.

## Corporation Profits (Before Taxes)

(Data Seasonally Adjusted at Annual Rates)



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



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