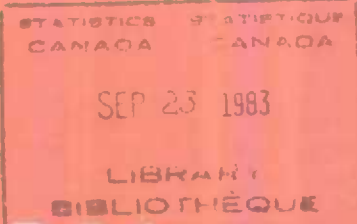


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Weekly Bulletin

September 23, 1983

Canadian Leading Indicator

According to the continued large and widespread gains in the Canadian leading indicator in June 1983, the recovery of output should be sustained for several months at least — the time horizon encompassed by the index. The composite index (1971=100) rose by 2.88% in June to 136.10, a rate of increase comparable to the monthly increases recorded since February 1983. The non-filtered version recorded the weakest increase since January, which could signal a slowing of the growth of output, similar to the behaviour of output in previous cyclical upturns. Final demand in consumer spending, housing, and merchandise exports all showed signs of slowing in the third quarter of 1983 after leading the initial upturn in the first half of the year, while business investment in machinery has begun to improve in a lagged response to the sharp recovery of profits.

Consumer demand should continue its upturn in the third quarter of 1983, according to the indicators of personal expenditure in June, as sales of furniture and appliances and new motor vehicles recorded gains of 2.61% and 3.57%, respectively. The non-filtered versions and preliminary indications for July and August, however,

(continued on next page)

Consumer Price Index

The Consumer Price Index (CPI) for Canada reached 118.5 (1981=100) in August 1983, up 0.5% from the July level of 117.9. The year-over-year increase was 5.5%, unchanged from the increase registered between July 1982 and July 1983. Over one-half of the latest monthly increase was due to the housing component while higher transportation costs and increased prices for clothing and tobacco and alcohol accounted for most of the remainder. Food prices, which had registered an advance of 0.6% between June and July, declined marginally (-0.1%) in August. The all-items-excluding-food index increased 0.6% between July and August after registering a rise of 0.4% in July.

Lower prices for fresh produce, coupled with price declines for selected pork and

(continued on next page)

LATEST MONTHLY STATISTICS

EMPLOYMENT, INCOME

			Previous Month	% Change From Year Ago
Average Weekly Earnings (\$)	Mar.	410.85p	407.55p	6.8
Labour Income (\$ million)	June	18,728.8p	17,717.9p	4.8
Persons with Jobs (million)	Aug.	11.18	11.18	2.5
Unemployed	Aug.	1,365,000	1,409,000	-1.7

INVENTORIES

Department Store (\$ million)	July*	3,136.8	2,981.4	4.3
Manufacturers' Owned (\$ million)	July*	29,506.3p	29,714.0r	-13.4

ORDERS

Manufacturers' New Orders (\$ million)	July*	15,384.9p	17,982.0r	11.6
Manufacturers' Unfilled Orders (\$ million)	July*	16,316.5p	16,289.7r	-3.9

PRICES

Consumer Price Index (1981=100)	Aug.*	118.5	117.9	5.5
New House Price Index (1976=100)	July	130.4	130.2	-1.4
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)	June	1,099.0p	7,028.6p	14.7
Housing Starts — Urban Centres (units)	July	10,529	85,428	40.1

ENERGY

Coal Production (thousand tonnes)	July*	2,838.9	24,414.5	-4.5
Electricity Generation (terawatt hours)	May	29.8	166.2	-1.5
Natural Gas Production (million cubic metres)	June*	6,485.6	47,909.6	-6.6
Petroleum Refining (million cubic metres)	July*	7.5p	47.0p	-9.7

FOREIGN TRADE

Exports — Balance of Payments Basis (\$ million)	July	6,659p	50,864p	2.3
Imports — Balance of Payments Basis (\$ million)	July	5,579p	40,598p	0.7

PRODUCTION

Railway Carloadings (million tonnes)	Aug.*	16.2p	130.0p	-6.0
Steel (ingots — thousand tonnes)	Aug.	1,093.4p	8,074.0p	-6.7

SALES

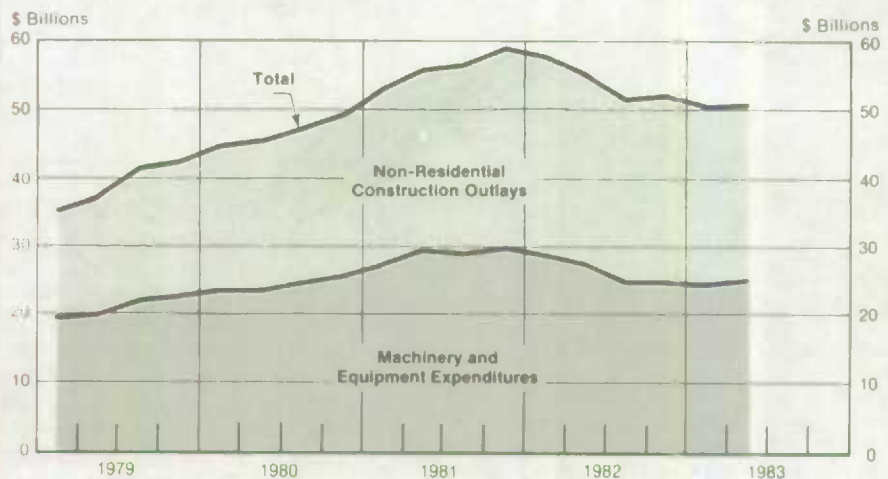
Department Store Sales (\$ million)	July	813.8	5,364.6	6.7
Manufacturers' Shipments (\$ million)	July*	15,358.1p	112,004.6p	4.3
New Motor Vehicle Sales (\$ million)	July	941.4	7,024.5	16.0
Retail Sales (\$ million)	July*	9,024.6p	57,565.6p	6.3

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

...Canadian Leading Indicator

give some signs of slowing, which could accentuate the already weak nature of the upturn in this sector compared to previous recoveries. The signs of a slowing of consumer demand in the third quarter were reinforced by the weakness of employment growth in August and the further slowdown of negotiated wage rates in the second quarter. On average those workers who negotiated contracts in the second quarter including an indexation clause received no increase in base rates.

The rapid rate of growth of the residential construction index in recent months slowed noticeably in June to +0.18%, which suggests that housing activity should soon slow down as well. Work-put-in-place continued to grow strongly in the second quarter, contributing to the recovery at a rate about equal to its historical average. The non-filtered version indicated large drops since the expiry of the CHOSP in May, although the declines have largely been concentrated in Ontario and the Prairies where the recovery of employment has been slower. The level of building permits and housing starts remained high elsewhere in Canada up to July, which suggests that activity in this sector will exhibit some strength at least for the rest of the year. The flattening-out of demand should prolong the moderation of prices, as the new housing price index recorded only a slight gain of 0.3% in the second quarter.

The leading indicators for manufacturing accelerated again and the gains were more diffuse, reflecting the broad recovery among the components of final demand. New orders for durable goods increased 2.13% in June — the fifth straight monthly gain — while the ratio of shipments to stocks of finished goods continued its rapid upturn (the non-filtered version has regained virtually all of the declines associated with the recession).

For further information, order *Current Economic Analysis* (13-004E, Canada: \$2.65/\$26.50; other countries: \$3.20/\$31.80).

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...Consumer Price Index

beef cuts, were largely responsible for the 0.2% decline in the food-purchased-from-stores index. In August, the index stood 2.2% above its level of August 1982. The food-purchased-from-restaurants index increased 0.3% and stood 4.2% above its level of a year earlier. As a result, the aggregate food index advanced 2.7% over its level of August 1982.

The increase of 0.6% in the all-items-excluding-food index was largely attributable to higher charges for rented accommodation, especially in the province of Quebec, to increased prices for furniture and major household appliances, mainly due to the termination of the temporary exemption of the 7% retail sales tax on these items in the province of Ontario and, to increased owned accommodation charges. Other notable increases included higher gasoline, tobacco, alcohol and clothing prices. Between August 1982 and August 1983, the all-items-excluding-food index advanced 6.3%.

On a seasonally adjusted basis the all-items index advanced by 0.7%: this comprised an increase of 0.6% in the food index and an advance of 0.7% in the all-items-excluding-food index.

City Highlights

Between July and August, consumer prices declined marginally in Edmonton (-0.1%) while increasing in all other cities for which CPIs are produced with increases ranging from 0.1% in Calgary to 0.8% in St. John's, Quebec City and Ottawa.

For further information, order the August 1983 issue of *The Consumer Price Index* (62-001, \$2.65/\$26.50), or contact Sandra Shadlock or Suzanne Gratton (613-995-4078).

Department Store Sales

Department store sales reached \$813.8 million in July 1983, 6.5% higher than in July 1982. Among the 25 departments which recorded increased sales, the largest gains were reported in major appliances (+41.4%), repairs and services (+39.7%) and furniture (+34.4%).

With the exception of the Yukon and Northwest Territories (-6.9%) which showed lower sales in July 1983 compared to the same month a year earlier, all the remaining provinces posted sales increases, ranging from 0.2% in British Columbia to 25.5% in Nova Scotia. Of the 10 metropolitan areas covered by the survey, eight cities had improved sales, with the largest increase in Halifax-Dartmouth (+38.7%); Vancouver (-1.2%) and Calgary (-3.0%) reported lower sales.

In July 1983, major department store organizations had sales of \$510.5 million (up 6.9% over the same month the previous year) while junior department store organizations had sales of \$303.3 million (up 5.9%).

Cumulative sales for all department stores for the first seven months of 1983 totalled \$5,364.6 million, up 6.7% from the January to July 1982 period.

Stocks

The selling value of stocks held in July 1983 registered an increase of 4.3% over the same month a year earlier and reached \$3,136.8 million.

For further information, order the July 1983 issue of *Department Store Sales and Stocks* (63-002, \$3.15/\$31.50).

Wholesale Trade

Wholesale merchants' sales in July 1983 increased substantially, rising 14% over the same period last year. The most noteworthy sales increases in July were recorded by wholesalers of electrical machinery, equipment and supplies (+55.5%), farm machinery, equipment and supplies (+26.9%) and lumber and building materials (+23.5%).

On a provincial basis, Alberta was the only province to show a decline in wholesale sales from last year.

Inventories

The level of wholesale inventories in July 1983 decreased by 7.2% from the corresponding period the previous year.

For further information, order the July 1983 issue of *Wholesale Trade* (63-008, \$1.55/\$15.50).

New Statistics Canada Catalogue Supplement Available

This Supplement describes changes in the Statistics Canada publication program which have occurred between January 1 and June 30, 1983.

The new Catalogue Supplement:

- Presents abstracts for new publications;
- Lists discontinued publications;
- Gives title, price and other changes; and
- Includes a title, subject and commodity index for the new publications with a separate index for the census publications.

Copies of the Supplement (one English and one French) are available at no charge from any of the Statistics Canada Advisory Services reference centres.

Foreign Trade/Automotive

Canada posted a record \$1.5 billion first half 1983 surplus on the balance of trade in automotive products with the United States, an advance of \$0.4 billion from the previous record surplus level of \$1.1 billion for January-June 1982. This compared with a \$1.5 billion deficit recorded for the corresponding period in 1981.

Most of the \$0.4 billion increase in the trade surplus in January-June 1983 took place in the first three months of the year and was due to a reduction in the deficit on parts. The trade surplus on vehicles — cars, trucks and other motor vehicles — totalled \$3.9 billion, unchanged from the same period of 1982, as both exports and imports registered increases of \$0.9 billion.

On a unit basis, exports to the United States of passenger cars classified by car size based on interior volume (including station wagons) were up 57,000 units, while imports climbed by 89,000. These increases were mainly attributable to vehicles with interior volume between 110 and 120 cubic feet. Exports of large cars were down 8,000 units, while imports were up 11,000 units.

Trade with Overseas Countries

Canada's deficit on trade in automotive products with overseas countries doubled to \$0.7 billion in the first six months of 1983; this reflected a 47% decline in exports that was widespread among the components, combined with a slight increase in imports.

Passenger Car Imports

Passenger car imports increased 26% or 79,000 units between the first half of 1982 and the same period of 1983. This increase was wholly attributable to a 90,000 unit jump in car imports from the United States; imports from overseas countries showed a marginal decline as a result of lower levels from all nations except Japan and Sweden.

For further information, contact François Bordé (613-995-6115), Trade Measures and Analysis Section, External Trade Division, Statistics Canada, Ottawa K1A 0T6.

Coal Production in Canada

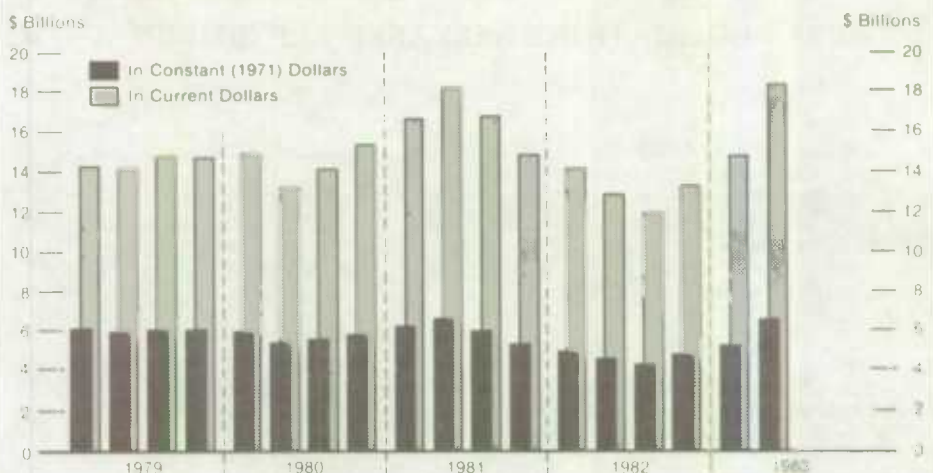
Canadian production of coal declined by 9.9% to 2 838.9 kilotonnes in July 1983 from 3 149.7 a year earlier. Exports of coal increased by 6.4% to 1 417.7 KT from 1 332.7, while landed imports were down 6.6% to 1 549.9 KT from 1 659.6 in July 1982.

Production of coal in the first seven months of 1983 totalled 24 414.5 KT, down 4.5% from 25 561.7 in the January-July 1982 period. Exports of coal dropped 4.7% to 9 240.5 KT from 9 694.5 and landed imports were down 28.6% to 5 595.9 KT from 7 840.1.

For further information, order the July 1983 issue of *Coal and Coke Statistics* (45-002, \$2.65/\$26.50), or contact Richard Godin (613-996-3139), Energy Section, Manufacturing and Primary Industries Division, Statistics Canada, Ottawa K1A 0T6.

Residential Construction Expenditures

Data Seasonally Adjusted at Annual Rates



Source: Statistics Canada, National Income and Expenditure Accounts (11-001)

Manufacturing Activity

Preliminary estimates show the value of new orders received in all Canadian manufacturing industries in July 1983, seasonally adjusted, increased 2.1% to \$17,141.6 million from the revised estimate of \$16,791.1 million in June. In durable goods industries, new orders with an estimated value of \$7,337.9 million were 4.7% higher than the June level of \$7,008.4 million; most of the increase reflected gains of \$118.8 million in electrical products industries and \$110.1 million in primary metal industries. In non-durable goods industries, new orders received had an estimated value of \$9,803.7 million, up 0.2% from the revised estimate of \$9,782.7 million for June.

The unfilled orders backlog of manufacturers at the end of July was \$16,360.7 million, seasonally adjusted, up 0.3% from the revised June estimate of \$16,306.9 million.

Manufacturers' shipments in July were valued at \$17,087.8 million, seasonally adjusted, up 1.4% from June's value of \$16,844.6 million. Shipments of durable goods industries were up 3.1% to \$7,283.4 million from \$7,064.6 million with increases of \$100.5 million in wood industries, \$64.1 million in primary metal industries and \$63.2 million in transportation equipment industries accounting for most of the gain. Non-durable goods industries shipments rose 0.2% to \$9,804.4 million from \$9,780.0 million; a \$76.2 million increase in petroleum and coal products industries was partly offset by a \$59.1 million loss in foods and beverages industries.

Inventory owned by manufacturers at the end of July was at a seasonally adjusted level of \$29,779.9 million, up 0.8% from the previous month's revised figure of \$29,556.7 million.

The seasonally adjusted ratio of total inventory owned to shipments at the end of July was 1.74:1, down from 1.75:1 in June. The ratio of finished products inventory to shipments moved down to 0.63:1 from 0.64:1.

Not adjusted for seasonal variation, manufacturers' shipments in July 1983 were estimated at \$15,358.1 million. Cumulative shipments for the first seven months of 1983 at an estimated \$112,004.6 million were up 4.3% from the January-July 1982 total of \$107,418.5 million.

For further information, order the July 1983 issue of *Inventories, Shipments and Orders in Manufacturing* (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, Ottawa K1A 0T6.

Refined Petroleum Products

Preliminary data show net sales in Canada of all refined petroleum products amounted to 6 357.2 thousand cubic metres in July 1983, a drop of 7.9% from 6 906.5 thousand cubic metres a year earlier.

Canadian refineries produced 7 468.5 thousand cubic metres of refined petroleum products in the latest month, down 7.7% from 8 088.3 thousand cubic metres in July 1982.

For further information, order the July 1983 issue of *Refined Petroleum Products* (45-004, \$3.70/\$37), or contact Richard Godin (613-996-3139), Energy Section, Manufacturing and Primary Industries Division, Statistics Canada, Ottawa K1A 0T6.

Railway Operating Statistics

The seven major railways in Canada reported a combined net income from operations of \$70.7 million in April 1983. Operating revenues of \$586.9 million were up 11.0% from the 1982 figure.

Revenue freight tonne-kilometres were down by 2.8% for April 1983, freight train-kilometres by 7.5%, and freight car-kilometres decreased 3.7%. The average revenue per tonne-kilometre of freight was 2.588 cents. Revenue passenger-kilometres decreased by 9.5% to 160.6 million.

For further information, order the April 1983 issue of *Railway Operating Statistics* (52-003, \$2.65/\$26.50).



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