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Weekly Bulletin



January 20, 1984

## Retail Trade

Strong auto sales in November 1983 offset the dampening effects of strikes in Quebec's retail food sector and British Columbia's liquor outlets and pushed total retail trade in current dollars to a level of \$9,297.3 million, up 8.8% from November 1982. Excluding the automotive group's sales, retail trade showed a gain of only 6.2%. Among the 28 kinds of businesses surveyed, 25 recorded higher sales, with the largest gains for household appliance stores (+35.9%), motor vehicle dealers (+29.1%) and furniture, TV, radio and appliance stores (+23.6%); decreases were reported by garages (-1.4%), book and stationery stores (-1.0%) and jewellery stores (-0.9%).

All provinces had sales increases in November 1983 compared to a year earlier, with advances ranging from 14.8% in Prince Edward Island to 1.4% in British Columbia. At the metropolitan area level, the four major cities all registered sales gains: Toronto, 12.4%; Winnipeg, 9.9%; Montreal, 4.5% and Vancouver, 0.9%.

Revised total retail trade for October 1983 was \$8,953.4 million, 8.4% higher than a year earlier.

(continued on page 2)

## Help-wanted Index

The seasonally adjusted Help-wanted Index for Canada (1981=100) advanced to 57 in December 1983 from 51 in November and was up from 39 in December 1982. The overall index is now at its highest level since March 1982 when it stood at 64. The five regional indexes also rose from both the month-earlier and year-earlier levels.

On a quarterly basis, the Canada index rose to 53 in the fourth quarter of 1983 from 49 in the previous quarter and 36 in the same period of 1982. All of the regional indexes increased except for a small decline recorded in the British Columbia index from the third to the fourth quarter of 1983.

The Canada Index improved throughout 1983, however, lower levels registered in the first half of the year compared with 1982, resulting in the annual average falling to 45 in 1983 from 48 in 1982.

Inquiries about the index should be directed to Horst Stiebert (613-995-7165 ext. 238), Labour Division, Statistics Canada, Ottawa K1A 0T6.

## LATEST MONTHLY STATISTICS

### EMPLOYMENT, INCOME

			Previous Month	% Change From Year Ago
Average Weekly Earnings (\$)	Oct.	394.95p	396.44p	
Labour Income (\$ million)	Oct.*	19,067.5p	19,117.6p	7.5
Persons with Jobs (million)	Nov.	10.71	10.82	3.4
Unemployed	Nov.	1,281,000	1,238,000	-10.9

### INVENTORIES

Department Store (\$ million)	Nov.*	3,854.9	3,732.9	14.2
Manufacturers' Owned (\$ million)	Oct.	30,534.8p	30,241.9r	-6.6

### ORDERS

Manufacturers' New Orders (\$ million)	Oct.	18,090.8p	21,613.9r	21.5
Manufacturers' Unfilled Orders (\$ million)	Oct.	20,383.4p	20,432.1r	29.3

### PRICES

Consumer Price Index (1981=100)	Nov.	119.2	119.2	4.2
New House Price Index (1976=100)	Nov.	131.8	131.4	1.6
Raw Materials Price Index (1977=100)	Nov.	211.3p	211.7p	5.3
Excl. coal, crude oil, nat. gas	Nov.	152.1p	152.8p	6.6
Industry Selling Price Index (1971=100)	Nov.	301.5p	301.4p	3.5

### CONSTRUCTION

Building Permits (\$ million)	Oct.	1,177.9p	12,068.6p	14.6
Housing Starts — Urban Centres (units)	Nov.	10,114	123,885	31.4

### ENERGY

Coal Production (thousand tonnes)	Oct.	4,253	36,155	2.5
Electricity Generation (terawatt hours)	Oct.	33.1	318.7	3.3
Natural Gas Production (million cubic metres)	Aug.	6,608.5	61,091.6	-6.0
Petroleum Refining (million cubic metres)	Oct.	8.0p	71.0p	-5.3

### FOREIGN TRADE

Exports — Balance of Payments Basis (\$ million)	Nov.	8,937p	82,911p	6.9
Imports — Balance of Payments Basis (\$ million)	Nov.	7,120p	66,883p	9.2

### PRODUCTION

Railway Carloadings (million tonnes)	Dec.*	16.6p	206.9p	3.7
Steel (ingots — thousand tonnes)	Dec.*	1,078.3p	12,745p	8.4

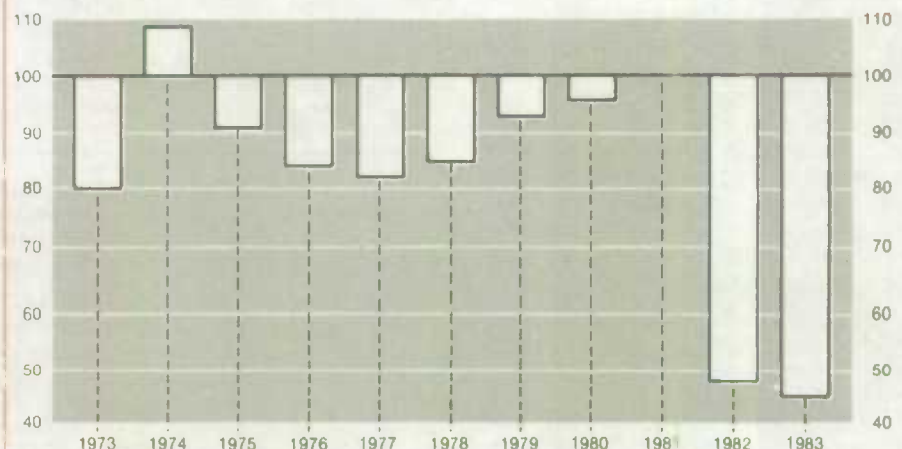
### SALES

Department Store Sales (\$ million)	Nov.	1,138.8	9,198.4	7.0
Manufacturers' Shipments (\$ million)	Oct.	18,139.5p	164,802.9p	6.9
New Motor Vehicle Sales (\$ million)	Nov.	1,200.0	11,298.0	24.2
Retail Sales (\$ million)	Nov.*	9,297.3p	93,485.5p	7.4

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

## Help-wanted Index, Canada

(1981=100)



Source: Statistics Canada, Daily Bulletin (11-001E)



### ... Retail Trade

Cumulative sales for the first 11 months of 1983 totalled \$93,485.5 million, up 7.4% over the January-November 1982 period.

#### Seasonally Adjusted Sales

Seasonally adjusted retail sales of \$8,879.1 million in November 1983 decreased 2.1% from October following successive increases of 0.2% in September and 2.8% in October. Compared to the preceding month, seasonally adjusted sales were down in November 1983 in all provinces and territories with the exception of Prince Edward Island (+2.4%); decreases ranged from -8.0% in British Columbia to -1.0% in Ontario.

For further information, order the November 1983 issue of *Retail Trade* (63-005, \$3.85/\$38.50), or contact Jean-Pierre Simard (613-996-9304), Retail Trade Section, Merchandising and Services Division, Statistics Canada, Ottawa K1A 9Z9.

### Railway Carloadings

Revenue freight loaded by railways in Canada in November 1983 totalled 19.0 million tonnes, an increase of 23.8% from a year earlier. The carriers received an additional 1.1 million tonnes from the United States, up 23.7% from November 1982.

Commodities registering notable changes in volumes loaded in the latest month were: copper-nickel ores and concentrates (+1,477.4%); wheat (+16.6%); iron ores and concentrates (+19.6%) and potash (+47.1%).

Total loadings in Canada during January-November 1983 showed an increase of 2.4% from the 1982 period, while receipts from U.S. connections increased by 6.4%.

For further information, order the November 1983 issue of *Railway Carloadings* (52-001, \$1.60/\$16). For seasonally adjusted revenue freight loadings, contact the Rail Unit (613-996-9271), Transportation and Communications Division, Statistics Canada, Ottawa K1A 0V1.

### Occupation by Demographic and Educational Characteristics

In Canada at the time of the 1981 Census, 5,469,010 men (76% of the male labour force) and 3,978,420 women (81.2% of the female labour force) lived in urban areas, and 1,686,250 men and 920,475 women (24% and 18.8% of the male and female labour forces respectively) lived in rural areas. Most people in scientific or clerical occupations resided in urban regions, while the majority of people in primary occupations (farming, animal husbandry) were located in rural areas. The percentages varied widely from province to province: Prince Edward Island had the highest proportion of rural residents (65% of its labour force), whereas 82% of Ontario's labour force lived in urban areas.

With regard to the labour force's level of schooling, 78% of men and 73.5% of women had secondary school education, and 22% of men and 26.5% of women had a university education. A large proportion of

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### Corporation Financial Data

Financial characteristics reported by Canadian corporations for 1981 continued to reflect overall growth in current dollars. The book value of assets rose 19% to \$1,169 billion, following a rise of 16% in 1980. The largest increase took place in the financial sector, with total assets up 21% to \$632 billion, after a 17% rise in 1980; in the non-financial sector, total assets increased 16% to \$538 billion.

Total sales of all industries in 1981 were \$706 billion, up 14% from 1980, the same rate of increase posted in the preceding year. The financial sector continued to outperform the non-financial sector, with sales up 33% to \$93 billion, compared with an increase of 12% to \$613 billion for the non-financial group of companies.

However, pre-tax profits of all industries in 1981 did not match the growth in sales and assets: with mixed industry performance, pre-tax profits (net of losses) decreased 3% to \$50 billion, compared to increases of 11% in 1980 and 38% in 1979. Net pre-tax profits in the non-financial sector declined 6% to \$39.5 billion, versus a growth of 11% in the previous year. In the financial sector, profits rose 12% to \$10.6 billion, after an increase of 15% in 1980.

Further information may be obtained from A. Dorland (613-995-9836), Business Finance Division, Statistics Canada, Ottawa K1A 0T6.

the people in the former category were in clerical, sales and service occupations, such as stock clerks, housekeepers and commodity sales persons; the occupations of those in the latter category included personnel managers, teachers, physicians and surgeons.

For further information, order *Labour Force — Occupation by Demographic and Educational Characteristics* (92-917, \$12), or contact Gilles Montigny or Francine Monette (613-995-9381), Economic Characteristics Division, Statistics Canada, Ottawa K1A 0T6.

### Leading Indicator of Construction Activity

The filtered index of construction — a leading indicator of building activity in Canada — continued to decline in September 1983, dropping 2.3% to a level of 85.4. The weakness of the index (1971=100) was attributable, as in previous months, to the downward movement of residential construction.

The residential index decreased 5.1% in September to 91.6, indicating that a recovery in housing construction is not foreseeable at this time. The extremely low level of building intentions for the multiple-dwelling category continued to prevail in September with units authorized at a seasonally adjusted annual rate of only 53,400. Building intentions for single-detached homes remained stable: the seasonally adjusted annual rate of 81,800 units for September was maintained throughout October and November.

The non-residential leading indicator maintained in September the moderate uptrend initiated in June by rising 2.1% to 76.7. The industrial component of the non-residential index rose 2.3% from August to 63.1, with the transportation industry partly responsible for the rise. The commercial and governmental indexes of future construction activity rose to 92.7 and 65.3, respectively.

For further information, order the October 1983 issue of *Building Permits* (64-001, \$3.85/\$38.50), or contact Lizette Gervais Simard (613-995-8213), Construction Division, Statistics Canada, Ottawa K1A 9Z9.

### Non-residential Building

The Non-residential Building Construction Input Price Index for Canada (1971=100) rose 0.2% to 302.1 in November 1983 from the revised October level of 301.4.

The building materials component index showed no overall change in November from October's level of 279.2. The labour component increased 0.5% to 327.5 from 326.0 as a result of wage increases for selected trades in the Atlantic and Prairie regions and Ontario.

Comparing November 1983 with November 1982, the non-residential building construction input price index posted a 4.9% year-over-year rise that comprised increases of 9.4% in labour and 0.5% in building materials.

For more information, order *Construction Price Statistics* (62-007, \$3.30/\$33).

### Residential Building

The Residential Building Construction Input Price Index for Canada (1971=100) increased to a level of 286.9 in November 1983, up 0.3% from the revised level of 286.1 in October. The building materials component declined 0.2% during the month, primarily reflecting lower prices for lumber and insulation which more than offset price increases for other materials, notably metal siding and plywood. The union wage rate index advanced 1.0%.



## New Motor Vehicle Sales

Retail sales of all new motor vehicles continued to show strong gains in November 1983: sales totalled 100,686 units, up 39.6% from 72,150 units in November 1982. Sales of North American passenger cars increased 47.2% to 58,447 units and domestic commercial vehicles registered a 62.4% gain to 18,286 units. Sales of new passenger cars manufactured overseas rose 13.4% from the same month a year earlier to 20,067 units and overseas commercial vehicles increased 11.5% to 3,886 units.

The share of the Canadian passenger car market held by North American manufacturers in November 1983 (based on unit sales) was 74.4%, up from 69.2% in November 1982. Japanese and European manufacturers both recorded lower shares with 20.2% and 5.4%, respectively, in the latest month compared with corresponding percentages for the same month in 1982 of 23.4% and 7.4%.

Total dollar value of all new motor vehicles sold in November 1983 increased 56.8% from a year earlier to \$1,200.0 million. North American passenger cars sold were valued at \$633.2 million (up 70.5%) and commercial vehicles at \$258.6 million (up 59.5%). Sales of overseas passenger cars rose by 31.4% to \$240.0 million and those of commercial vehicles increased by 21.5% to \$38.1 million.

Cumulative sales of all new motor vehicles for the first 11 months of 1983 reached 1,006,889 units (17.9% higher than in the same period in 1982) with a retail value of \$11,298.0 million (up 24.2%).

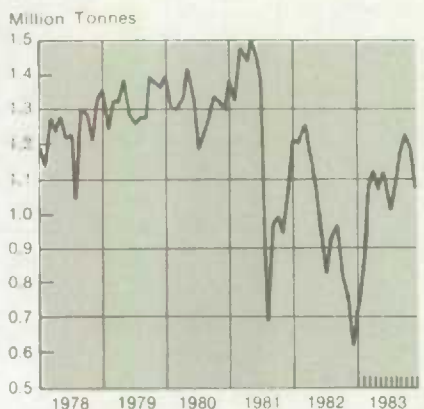
For further information, order the November 1983 issue of *New Motor Vehicle Sales* (63-007, \$2.75/\$27.50), or contact Jean-Pierre Simard (613-996-9304), Retail Trade Section, Merchandising and Services Division, Statistics Canada, Ottawa K1A 9Z9.

## Fixed Capital Flows and Stocks

Statistics Canada has just released *Fixed Capital Flows and Stocks, Historical, 1936 to 1983*, a report that contains, in both current and constant dollars, information about gross and net capital stocks (fixed reproducible assets), capital consumption allowances and gross and net capital formation (buildings, engineering structures and machinery and equipment). The publication also includes price indexes for capital expenditures on plant and equipment by industry. The data cover the manufacturing, non-manufacturing, government-related and residential sectors.

The fixed assets estimates contained in the publication will be useful to a variety of professionals. Economists in particular will find it valuable, both for theoretical model-building and as a basis for developing policy strategies. Businessmen and investment analysts may find it useful as a medium- and long-term indicator of capital investment trends and changes in patterns of economic growth. The analysis is made easier by the presentation of the informa-

## Steel Ingot Production Canada



Source: Statistics Canada, Primary Iron and Steel (41-001)

## Labour Income

Labour income for the month of October 1983 was estimated at \$19,067.5 million, an increase of \$1,328.1 million or 7.5% from October 1982.

Adjusted for seasonal variation, wages and salaries increased by \$22.6 million between September and October 1983 to \$16,916.9 million.

The estimates will be published in the October-December 1983 issue of *Estimates of Labour Income* (72-005, \$5.55/\$22.20). For further information, contact G. Gauthier (613-995-7165), Labour Income Section, Labour Division, Statistics Canada, Ottawa K1A 0T6.

## Telephone Statistics

Canada's 13 major telephone systems reported revenues of \$727.6 million in November 1983, up 7.8% from a year earlier. Operating expenses rose 4.5% over the 12 months to \$496.1 million. Net operating revenue at \$231.5 million showed an increase of 15.6% over November 1982.

For further information, order the November 1983 issue of *Telephone Statistics* (56-002, \$1.60/\$16), or contact J.R. Slattery (613-996-9271), Transportation and Communications Division, Statistics Canada, Ottawa K1A 0V1.

tion in constant dollars, which allows the real value of capital investment to be determined. The period covered by the publication also provides easy reference to the ebb and flow of business cycles in Canada over the last 47 years.

*Fixed Capital Flows and Stocks, Historical, 1936-1983* (catalogue no. 13-568, \$15.90) is now available through Statistics Canada's regional reference centres or may be ordered from Publication Sales and Services, Statistics Canada, Ottawa K1A 0T6. Further information may be obtained from the National Wealth and Capital Stock Section of the Construction Division (613-995-8152).

## Industrial Corporations

Third quarter 1983 final results confirm the continuing strong recovery in industrial corporations' profits that was indicated in the preliminary results on a seasonally adjusted basis. Pre-tax profits rose 12.8% while net profits jumped 18.1% over the previous quarter. The third quarter 1983 gains follow solid pre-tax profit increases of 21.4% and 15.2% in the first and second quarters. On a year-to-year basis, profits before taxes rose 63.1% to \$7,376 million, and profits after taxes increased 95.7% to \$4,166 million.

Seasonally adjusted profit before taxes and extraordinary items in the mining sector, was virtually flat between the second and third quarters of 1983, standing at \$1,284 million in the current quarter. After-tax profits increased 10.6% to a level of \$510 million in the third quarter from last quarter's \$461 million.

Manufacturing sector pre-tax profits rose to \$3,517 million in the third quarter of 1983 from \$2,912 million last quarter, while net profit jumped 18.2% quarter-to-quarter to stand at \$1,974 million. The petroleum and coal, paper, primary metals and metal fabricating industries experienced the largest gains.

Petroleum and coal industry pre-tax profits were up significantly this quarter, increasing to \$919 million from \$735 million last quarter. Sales rose to \$8,385 million from \$8,157 million.

The annualized return on shareholders equity (profit after taxes excluding extraordinary gains and losses as a percentage of shareholders' equity) improved for the fourth consecutive quarter in the third quarter of 1983. The current figure of 9.1% is up marginally from 9.0% in the second quarter, but is significantly improved from the low of 4.9% recorded in the third quarter of 1982. (The return on shareholders' equity peaked in 1979 when it stood at 16.5%.)

Operating margin — relating operating income to sales — rose slightly in the third quarter to 4.0%, up from 3.8% last quarter and significantly above the third quarter 1982 level of 2.0% experienced in the recession.

Users should note that these revised data cover all non-government owned corporations in Canada except those in the agriculture, fishing, real estate, construction, and finance industries. Complete income statement information, as well as balance sheets and income statements for corporations with assets exceeding \$10 million is available. For further information, contact Tom Maxwell or Gail Campbell (613-995-9751).

## Production of Raw Steel

Preliminary estimates show steel ingot production for the month of December 1983 totalled 1 078 340 tonnes, an increase of 75.3% from 615 066 tonnes a year earlier.

For further information, order the December 1983 issue of *Primary Iron and Steel* (41-001, \$2.75/\$27.50).



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## THESE PUBLICATIONS RELEASED JANUARY 13 — 19

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Population: Worked Since January 1, 1980 — Industry by Labour Force and Work Activity, 1981 Census of Canada	92-924	\$7.50	\$9
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Gas Utilities, September 1983	55-002	\$2.75/\$27.50	\$3.30/\$33
Inventories, Shipments and Orders in Manufacturing Industries, October 1983	31-001	\$3.85/\$38.50	\$4.60/\$46
Monthly Production of Soft Drinks, December 1983	32-001	\$1.60/\$16	\$1.90/\$19
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