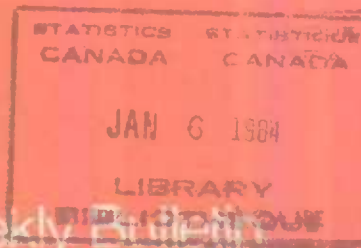


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Weekly Bulletin



January 6, 1984

Canadian Leading Indicator

The advance of the leading indicator (1971=100) decelerated further in September — to 1.78% from 2.12% in August — with evidence of a slowdown in the rate of growth accumulating in most components except manufacturing activity. The index now stands at 144.88, having recouped all of the decline recorded during the past recession. Signs of a decline remain few, as only the residential construction index has turned negative, while the prospects remain bright for vigorous industrial activity and rising consumer and export demand to 1983 year-end. The non-filtered index rose by 1.6% in September, although declines were again evident in four of the components.

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.

Unemployment Insurance

Benefits paid to unemployment insurance claimants in October 1983 totalled \$652 million, down 2% from September. Payments were also 6% less than in October 1982 when an all-time high for this particular month of \$694 million was reached. For the first 10 months of 1983, unemployment insurance benefits amounted to \$8.66 billion, up 27% from the \$6.82 billion disbursed in the same period of 1982.

Preliminary data reveal that 990,000 persons drew some benefits for the week ending October 15, an increase of 4% from the previous month but 13% fewer than the 1,135,000 beneficiaries reported in October 1982.

The number of claims submitted by persons applying for benefits rose 10% to 303,000 in October from 276,000 in September (claims usually increase between these two months). However, compared with a year earlier, the number of claims filed dropped by 15%. Claims for the first 10 months of 1983 were down 12% to 2.71 million from 3.09 million recorded in the same months of 1982.

For further information, order the July-September 1983 issue of *Statistical Report on the Operation of the Unemployment Insurance Act* (73-001, \$6.35/\$25.40), or contact H. Stiebert (613-995-7165, extension 238).

LATEST MONTHLY STATISTICS

EMPLOYMENT, INCOME

			Previous Month	% Change From Year Ago
Average Weekly Earnings (\$)	Oct.*	394.95p	396.44p	
Labour Income (\$ million)	Sept.	19,154.4p	18,659.8p	7.8
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)	Oct.	3,732.9	3,310.4	11.7
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)	Oct.	131.4	131.3	0.9
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)	Oct.	9,285	113,771	36.9

ENERGY

Coal Production (thousand tonnes)	Oct.*	4,253	36,155	2.5
Electricity Generation (terawatt hours)	Sept.	30.5	285.7	2.1
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)	Oct.	8,180p	73,931p	4.9
Imports — Balance of Payments Basis (\$ million)	Oct.	7,021p	59,814p	6.8

PRODUCTION

Railway Carloadings (million tonnes)	Nov.	19.6p	190.3p	2.5
Steel (ingots — thousand tonnes)	Oct.	1,230.1p	10,482.7p	0.9

SALES

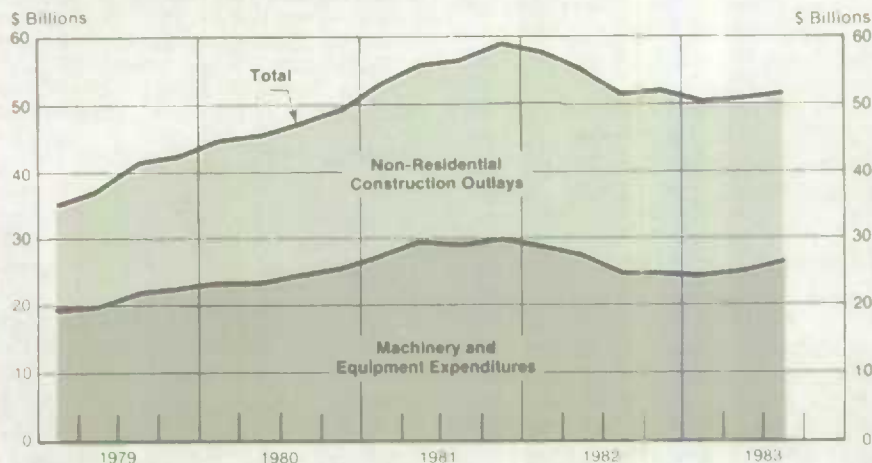
Department Store Sales (\$ million)	Oct.	922.0	8,059.6	7.1
Manufacturers' Shipments (\$ million)	Oct.	18,139.5p	164,802.9p	6.9
New Motor Vehicle Sales (\$ million)	Oct.	1,164.2	10,098.0	21.2
Retail Sales (\$ million)	Oct.	9,003.8p	84,238.6p	7.3

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)

Current Economic Analysis

The release of the third quarter 1983 National Accounts confirmed that economic activity in Canada continued to expand at a rapid rate, although growth originated primarily in business outlays for inventories and machinery and equipment. Consumer demand slowed slightly in the quarter and housing activity declined, while exports stabilized after slowing earlier in the year. There are indications that this redistribution of the sources of growth will continue in the short-term, and that business fixed investment may not be sufficiently strong to maintain the current pace of the expansion. Most of the related indicators for business investment in machinery and equipment already have begun to slow from their initial rapid rates of upturn, notably imports and domestic orders for investment-related materials. At the same time, preliminary results of the survey of investment intentions of large firms conducted by the Department of Regional Industrial Expansion are not encouraging for strong growth in 1984 — notably in those sectors where long-term investment predominates, such as pipelines and utilities. The low rate of capacity utilization, and continued high long-term interest rates and debt burdens militate against a vigorous recovery of this type of investment. Outlays for machinery and equipment should fare slightly better, given the shorter time horizon needed to recoup the gains from these capital investments and industry's desire to maintain productivity growth.

The prospects for a weak cyclical upturn of business investment should not prevent another solid gain in GNP in the fourth quarter, however, as industrial activity and retail sales appear poised for further quarterly gains. At the same time, the United States economy continued to expand at a strong rate with no significant slowdown expected before early 1984, and export growth in Canada responded positively in October. Unlike in Canada, the expansion in the U.S. is being accompanied by a significant upturn in business investment, which is supplanting the auto and housing sectors as sources of growth. The signs of a slowing of the growth of the Canadian economy relative to the U.S. entering the fourth quarter, particularly for business investment, are becoming apparent in the growing divergence of employment between the two countries in October and November. The divergence also is evident in the merchandise trade balance, once the effect of large petroleum imports is removed.

Telecommunications

Teleglobe Canada and CNCP Telecommunications reported revenues of \$128.6 million for the third quarter of 1983, up 7.6% from July-September 1982. Operating expenses increased 9.9% over the 12 months to \$94.5 million. Net operating revenue at \$34.1 million showed a marginal increase from \$33.5 million in the third quarter of 1982.

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Weekly Bulletin

Published by the Federal and Media Relations Division, Statistics Canada

Senior Editor Greg Thomson
(613-593-7444)

Catalogue 11-002E. Price: Canada, \$27.75 a year; other countries, \$33.30 a year. To subscribe: send money order or cheque payable to the Receiver General for Canada to Publication Sales and Services, Statistics Canada, Ottawa K1A 0T6

Marriages, 1982

Canadian marriages totalled 188,360 in 1982, down about 1% from the previous year. In percentage terms, appreciable declines in marriages were registered in 1982 in Quebec, New Brunswick, British Columbia, and the Yukon and Northwest Territories.

The marriage rate of 7.6 per 1,000 population for the country as a whole in 1982 was the lowest recorded in nearly a decade and a half. Almost all the provinces, except Ontario and Manitoba, registered declines in the rates of marriage in 1982 compared to the previous year. Among the provinces, Quebec had the lowest rate while Alberta had the highest. A decade earlier, in 1972, when the number of marriages in the country was at an all-time high of more than 200,000, the marriage rate recorded was 9.2, about 21% higher than the 1982 level.

For all marriages contracted in 1982, the average age at marriage for women was 26.4 years and that for men 29.0 years, both almost two years higher than the corresponding figures for 1972.

Detailed tabulations on marriages for 1982 will be published in Marriages and Divorces, Vital Statistics, Vol. II (catalogue 84-205). For further information, contact Dhruva Nagnur (613-995-9593), Demographer, Vital Statistics and Disease Registries Section, Health Division, Statistics Canada, Ottawa K1A 0T6.

Births, 1982

A total of 373,082 live births were recorded in Canada during 1982, a marginal increase of 0.5% from 1981. The birth rate per 1,000 population was 15.1 in 1982 compared to 15.3 in 1981.

Among the provinces, Alberta recorded the highest birth rate in 1982 (19.4), followed by Saskatchewan (18.1) and Newfoundland (16.1). Quebec's rate of 14.0 was the lowest.

Detailed tables on births in 1982 will be published in Births and Deaths, Vital Statistics, Vol. I (catalogue 84-204).

Manufacturing Activity

Preliminary estimates show the seasonally adjusted value of new orders received in all Canadian manufacturing industries in October 1983 decreased 16.1% to \$17,535.4 million from the revised September level of \$20,897.5 million. New orders in transportation equipment industries were down \$3,440.6 million from the September total which reflected the Federal government's frigate order. Excluding the transportation equipment industries, new orders in durable goods industries were up 2.2% in October. In non-durable goods industries, new orders received had an estimated value of \$9,888.9 million, down 0.3% from the revised estimate for September of \$9,920.2 million.

Manufacturers' shipments in October were at a seasonally adjusted level of \$17,430.1 million, up 0.5% from September's value of \$17,342.5 million. Shipments of durable goods industries advanced 2.1% to \$7,563.2 million from \$7,405.5 million with an increase of \$175.1 million in transportation equipment industries accounting for most of the gain. Shipments of non-durable goods were down 0.7% to \$9,866.9 million from \$9,937.0 million.

Not adjusted for seasonal variation, manufacturers' shipments in October 1983 were estimated at \$18,139.5 million. Cumulative shipments for the first 10 months of 1983 reached an estimated \$164,802.9 million, up 6.9% from the January-October 1982 figure of \$154,152.2 million.

For further information, order the October 1983 issue of Inventories, Shipments and Orders in Manufacturing Industries (31-001, \$3.70/\$37), or contact J. Lepage (613-996-7008).

Corporation Tax Statistics

Income taxes declared by corporations in Canada (excluding insurance carriers and credit unions) decreased by 2% from the 1980 level to \$11,173 million in 1981. The decline was in sharp contrast to the two preceding years when corporate taxes grew by more than 20% annually.

Corporation income taxes were down substantially in 1981 in export-oriented industries where falling demand and prices led to sharply-reduced profits: income taxes decreased by more than 69% in metal mining, 56% in forestry, 54% in primary metals, 39% in paper and allied industries and 36% in wood industries.

In 1981, the corporate sector paid taxes at an average rate of 36% of net book profits (adjusted to exclude capital gains and dividends), up significantly from 32% in the preceding year. Using this ratio as a measure of tax burden, small firms — taken as a group — paid proportionately more taxes than did larger corporations. The rate of tax for firms with assets of \$25 million or more was 30% of adjusted book profits, while for firms with assets of less than \$1 million, the tax rate was 44% in 1981.

Further details will be contained in the 1981 edition of Corporation Taxation Statistics (61-208).

Building Permits

The value of building permits issued by Canadian municipalities rose 12.7% in October 1983 to a seasonally adjusted \$1,280.1 million from the revised level of \$1,136.2 million in September. This increase — the first significant advance in five months — reflected a moderate gain in residential permits combined with a strengthening of non-residential construction intentions. In October 1982, the value of proposed building construction was estimated at \$1,070.0 million.

Residential building permits issued in October 1983 were estimated at a seasonally adjusted \$703.1 million, up 6.2% from the September level of \$661.8 million. In the non-residential sector, the value of new building projects authorized was estimated at \$570.0 million, significantly higher (+21.6%) than the September level of \$474.4 million. By category, the value of industrial projects dropped 32.2% to \$69.8 million in October from \$102.9 million in September; commercial projects rose 15.9% to \$309.7 million from \$267.1 million and projects initiated by governments and government agencies climbed 89.2% to \$197.5 million from \$104.4 million in September.

For additional information, order the October 1983 issue of *Building Permits* (64-001, \$3.70/\$37), or contact J.P. Delisle (613-995-8213), Construction Division, Statistics Canada, Ottawa K1A 9Z9.

Industry Selling Price Index

Preliminary estimates show the Industry Selling Price Index (ISPI) for manufacturing (1971=100) stood at 301.5 in November 1983, up marginally from the revised level of 301.4 for October. With this rise, the year-over-year advance — from November 1982 to November 1983 — was 3.5%, the 11th consecutive month in which the annual movement has been between 3% and 4%.

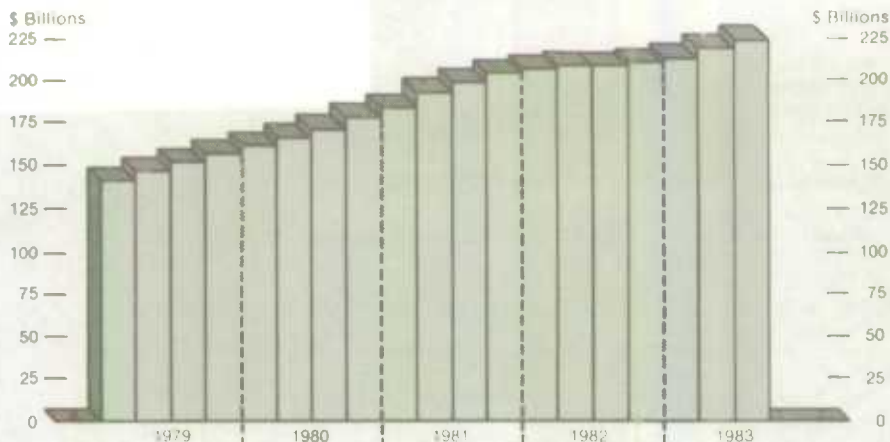
The paper and allied industries component index rose 0.6% in November 1983 to a level 2.7% higher than a year earlier. The change for the month was largely attributable to price increases of 5.6% for corrugated boxes, 3.0% for container-grade paper-board, Kraft and paper board and 9.0% for non-chemical corrugating materials; these increases followed a 12-month period in which there was very little upward movement in prices.

The food and beverage index edged up 0.2% in the latest month and was 4.3% higher than in November 1982. Monthly declines of about 7% in the cane and beet sugar processors index and the vegetable oil mills index were more than offset by increases of 3.0% in the fish products industry, 2.0% for poultry processors and 0.6% in the dairy products industry.

The wood industry index tumbled 1.6% in November 1983, but remained 6.9% above its year-earlier level. The main factor in the decrease was a 2.8% drop in the sawmills and planing mills component, reflecting price cuts of about 4% for spruce, hemlock and cedar.

Wages, Salaries and Supplementary Labour Income

Data Seasonally Adjusted at Annual Rates



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

Employment in Industry

Preliminary estimates show employment at the Canada industrial aggregate level increased by 0.4% from September to October 1983. Increased employment was registered in service, trade and finance, insurance and real estate, while the remaining industry divisions showed declines. Employment rose in Quebec, Ontario, Manitoba and Saskatchewan but decreased in the other provinces and the territories.

Average weekly earnings at the Canada industrial aggregate level decreased by 0.4% to \$394.95 in October from \$396.44 in September. Earnings were lower in all industry divisions except mining, manufacturing and transportation, communication and other utilities. Decreases were recorded in all provinces and territories except Nova Scotia, New Brunswick and Manitoba.

Detailed information for September and October will be published in the October 1983 issue of *Employment, Earnings and Hours* (72-002, \$5.30/\$53), or may be obtained by calling the Labour Division (613-995-7165), Statistics Canada, Ottawa K1A 0V1.

Raw Materials Price Index

The Raw Materials Price Index (1977=100) posted a preliminary level of 211.3 in November 1983, down 0.2% from 211.7 (revised) in October, but up 5.3% from 200.7 in November 1982. Excluding the coal, crude oil, and natural gas component, the Raw Materials Price Index declined 0.5% in November to stand 6.6% above the level of a year earlier.

The non-ferrous metals component index fell 3.0% in November primarily as a result of lower prices for copper and precious metals. Despite this latest monthly decrease, the index remains 13.3% above the level of a year earlier.

Although vegetable products declined 1.8% in November, the index still stands 26.7% higher than in November 1982; this marks the fourth consecutive month in

which 12-month increases in the index have surpassed 20%.

For further information, order the November 1983 issue of *Industry Price Indexes* (62-011, \$3.70/\$37), or contact Industrial Prices Section (613-995-5738).

Security Transactions

Non-residents reduced their holdings of outstanding Canadian securities in October 1983, producing a net capital outflow of \$63 million. Net outflows were recorded from trading in both bonds and stocks, in contrast to September when non-residents were net buyers of outstanding Canadian bonds and stocks. For Canadian bonds, there was a decline in the gross volume of sales to non-residents in the current month, notably to Japan.

Residents of Canada increased their holdings of outstanding foreign securities in October, giving rise to a net outflow of nearly \$100 million. Except for September 1983, Canadian residents have been net buyers of foreign securities since mid-1982. The bulk of the net investment in the current month represented the acquisition of foreign bonds, mainly in the United States.

For further information, order the October 1983 issue of *Security Transactions with Non-residents* (67-002, \$2.65/\$26.50), or contact John Motala (613-996-2545), Balance of Payments Division, Statistics Canada, Ottawa K1A 0T6.

Computer Service Industry

Total 1982 operating revenues of \$1,347.7 million were reported by the 1,752 companies in Canada primarily engaged in providing processing, software and systems and other computer-related services.

Another 56 companies primarily engaged in the sale, lease and rental of hardware reported total operating revenue of \$1,845.9 million.

For further information, order the 1982 edition of *Computer Service Industry* (63-222), or contact R. Bennett (613-996-9301), Merchandising and Services Division, Statistics Canada, Ottawa K1A 9Z9.

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AGRICULTURE STATISTICS

Cereals and Oilseeds Review, October 1983

Farm Cash Receipts, January-October 1983

Index Numbers of Farm Prices of Agricultural Products, October 1983

Cata-
logue
No.

In Canada:
Price per
issue/year

Elsewhere:
Price per
issue/year

22-007
21-001
62-003

\$2.65/\$26.50
\$1.60/\$16
\$1.60/\$16

\$3.20/\$31.80
\$1.90/\$19
\$1.90/\$19

CANADIAN CENTRE FOR JUSTICE STATISTICS

Service Bulletin

Juristat, Vol. 3, No. 2, Police Administration — Statistical Highlights, 1982

85-002

(N/C)

(N/C)

CENSUS

Population: Labour Force — Occupation by Demographic and Educational Characteristics, 1981 Census of Canada

92-917

\$12

\$14.40

Population: Place of Work — Census Agglomerations of 25,000 Population and Over, 1981 Census of Canada

92-909

\$9.50

\$11.40

Population: Place of Work — Census Metropolitan Areas, 1981 Census of Canada

92-908

\$12

\$14.40

Population: Worked Since January 1, 1980 — Occupation by Labour Force and Work Activity, 1981 Census of Canada

92-919

\$12

\$14.40

CONSTRUCTION

Building Permits, September 1983

64-001

\$3.70/\$37

\$4.45/\$44.40

Housing Starts and Completions, October 1983

64-002

\$3.30/\$33

\$3.95/\$39.50

INDUSTRY PRODUCT

Gross Domestic Product by Industry, September 1983

61-005

\$3.70/\$37

\$4.45/\$44.40

EDUCATION, CULTURE AND TOURISM

Service Bulletin

Culture Communiqué Service Bulletin, Vol. 6, No. 10, Newspapers and Periodicals, 1982

87-001

\$1.55/\$15.50

\$1.85/\$18.60

MANUFACTURING AND PRIMARY INDUSTRIES

Canned and Frozen Fruits and Vegetables — Monthly, October 1983

32-011

\$1.55/\$15.50

\$1.85/\$18.60

Coal and Coke Statistics, September 1983

45-002

\$2.75/\$27.50

\$3.30/\$33

Construction Type Plywood, October 1983

35-001

\$1.60/\$16

\$1.90/\$19

Consumption, Production and Inventories of Rubber, October 1983

33-003

\$1.55/\$15.50

\$1.85/\$18.60

Electric Lamps (Light Sources), November 1983

43-009

\$1.55/\$15.50

\$1.85/\$18.60

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57-001

\$2.65/\$26.50

\$3.20/\$31.80

Manufacturing Industries of Canada: National and Provincial Areas, 1981

31-203

\$15.90

\$19.10

Mineral Wool Including Fibrous Glass Insulation, November 1983

44-004

\$1.55/\$15.50

\$1.85/\$18.60

Particleboard, Waferboard and Hardboard, October 1983

36-003

\$1.55/\$15.50

\$1.85/\$18.60

Primary Iron and Steel, October 1983

41-001

\$2.65/\$26.50

\$3.20/\$31.80

Production and Inventories of Process Cheese and Instant Skim Milk Powder, November 1983

32-024

\$1.55/\$15.50

\$1.85/\$18.60

Refined Petroleum Products, September 1983

45-004

\$3.70/\$37

\$4.45/\$44.40

Service Bulletin

Fruit and Vegetable Preservation, Vol. 12, No. 12, Pack of Processed Apricots, 1983

32-023

\$1.55/\$15.50

\$1.85/\$18.60

MERCHANDISING AND SERVICES

New Motor Vehicle Sales, October 1983

63-007

\$2.65/\$26.50

\$3.20/\$31.80

Retail Trade, October 1983

63-005

\$3.70/\$37

\$4.45/\$44.40

PUBLIC FINANCE

Provincial Government Employment, April-June 1983

72-007

\$5.30/\$21.20

\$6.35/\$25.45

SCIENCE AND TECHNOLOGY

Service Bulletin

Science Statistics Service Bulletin, Vol. 7, No. 12, R&D Expenditures of Private Non-Profit Organizations, 1982

88-001

\$1.55/\$15.50

\$1.85/\$18.60

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Air Carrier Traffic at Canadian Airports, 1982

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\$10.60

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