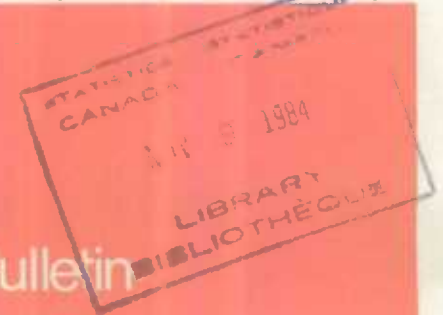


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Weekly Bulletin



November 9, 1984

## LATEST MONTHLY STATISTICS

### EMPLOYMENT, INCOME

Average Weekly Earnings (\$)	Aug.	403.35	403.77	3.2
Labour Income (\$ million)	Aug.	19,619.2	19,734.7	5.5
Persons with Jobs (million)	Sept.	11.16	11.52	1.9
Unemployed	Sept.	1,363,000	1,347,000	7.4

### INVENTORIES

Department Store (\$ million)	Aug.	3,434.7	3,304.7	6.8
Manufacturers' Owned (\$ million)	Aug.	32,575.4	32,411.6	8.9

### ORDERS

Manufacturers' New Orders (\$ million)	Aug.	19,176.6	17,336.6	12.7
Manufacturers' Unfilled Orders (\$ million)	Aug.	22,354.2	22,126.0	33.9

### PRICES

Consumer Price Index (1981=100)	Sept.	123.0	122.9	3.8
New House Price Index (1981=100)	July	95.2	95.3	0.6
Raw Materials Price Index (1977=100)	Sept.	212.7	214.1	0.8
Excl. coal, crude oil, nat. gas	Sept.	156.1	158.4	2.0
Industry Selling Price Index (1971=100)	Sept.	312.0	312.5	3.6

### CONSTRUCTION

Building Permits (\$ million)	Aug.	1,275.4	10,059.2	4.2
Housing Starts — Urban Centres (units)	Sept.	9,545	84,572	-19.1

### ENERGY

Coal Production (thousand tonnes)	Aug.	4,711	36,821	32.4
Electricity Generation (terawatt hours)	Aug.	33.7	279.3	9.2
Natural Gas Production (million cubic metres)	Aug.	6,271	57,470	8.5
Petroleum Refining (million cubic metres)	Aug.	8.0	59.4	7.3

### FOREIGN TRADE

Exports — Balance of Payments Basis (\$ million)	Sept.	9,430	83,521	27.4
Imports — Balance of Payments Basis (\$ million)	Sept.	7,238	69,243	31.0

### PRODUCTION

Railway Carloadings (million tonnes)	Aug.	20.9	158.3	20.4
Steel (ingots — thousand tonnes)	July	1,117	8,696	24.6

### SALES

Department Store Sales (\$ million)	Aug.	873.0	6,506.5	4.7
Manufacturers' Shipments (\$ million)	Aug.	18,948.4	148,872.6	16.0
New Motor Vehicle Sales (\$ million)	Sept.	1,013.2	11,808.1	32.2
Retail Sales (\$ million)	Aug.	9,768.3	73,432.8	9.5

Statistics are in current dollars and are not seasonally adjusted.

\* - new this week.

## External Trade

On a seasonally adjusted balance of payments basis, preliminary results show Canada's total exports declined 3.8% or \$385 million to \$9.8 billion in September from a record level of \$10.2 billion in August. This follows increases of \$405 million in August and \$280 million in July. Imports declined more sharply, falling 10.1% or \$890 million to \$7.9 billion, following a record increase of \$1,035 million in August and a rise of \$255 million in July. As a result, the merchandise trade surplus expanded by \$505 million to a level of \$1.9 billion in September 1984, following a drop of \$625 million in August to \$1.4 billion.

The merchandise trade surplus for January-September 1984 was \$15.3 billion, up \$1.9 billion from the corresponding period last year.

## Commodity Analysis

The \$385 million decline in total exports in September 1984 was largely attributable to a \$315 million decline in exports of automotive products, a sharp turn-around from the \$620 million increase in August.

Almost half of the \$890 million decline in total imports was attributable to end products, notably aircraft and automobiles. The drop in end products follows a record \$675 million jump in August. Large declines were also recorded for crude petroleum and precious metals.

## Trading Partner Analysis

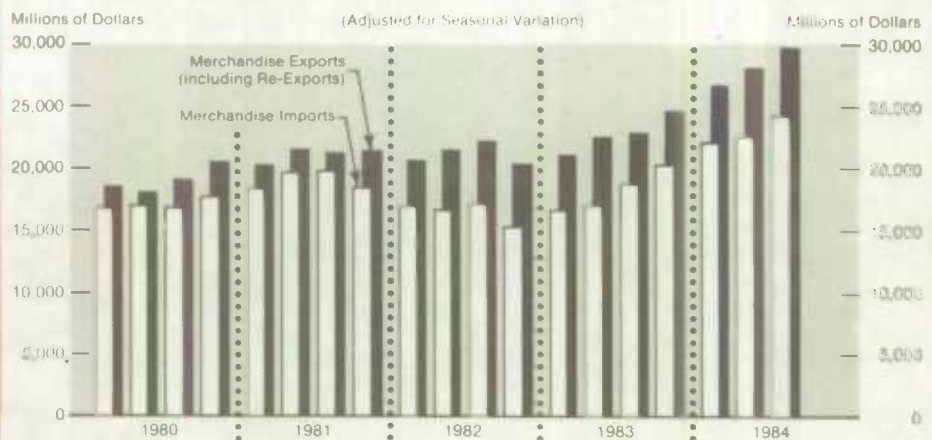
Following a \$625 million surge in August, Canada's exports to the United States dropped \$360 million in September to \$7.5 billion. Automobile products were primarily responsible for the volatile movements and reflect to some extent anticipatory transactions in August in response to the threat of strikes in September. Total exports to the rest of the world, which remained stable at \$2.0 billion a month from February to April, climbed from \$2.2 billion in May to a peak of \$2.6 billion in July before falling to a level of \$2.3 billion in September.

Imports from the United States registered a \$625 million decline in September. Imports from the rest of the world declined 10.9% or \$265 million in September, following an increase of \$195 million in August.

Order the September 1984 issue of Summary of External Trade (65-001, \$3.30/\$33), or contact Gordon Blaney (613-990-9647) or Judith Frederick (613-990-9784), External Trade Division.

## Canadian Merchandise Exports and Imports\*

Quarter-by-Quarter Movements



\* Balance of Payments Basis

Source: Statistics Canada, Summary of External Trade (65-001)

Canada

## Business Conditions Survey

Canadian manufacturers expect lower production in the fourth quarter of 1984 compared to the third quarter. The results show that respondents whose shipments represent 33% of total respondents' shipments forecast lower production in fourth quarter whereas those representing 27% expect higher production.

New orders at the Canada level were reported to be declining by 25% of responding manufacturers while 21% indicated gains. At the economic use group level, new orders dropped sharply in the export-based industries.

In the October survey, the backlog of unfilled orders was reported to be higher than normal by 13% of respondents, lower than normal by 26% and about normal by 61%. In July, 20% reported higher than normal backlog, 23% lower than normal and 57% about normal.

Compared to last July's results, there was little change in the assessment by manufacturers of the level of finished product inventory. In October, finished product inventory was reported to be too high by 21%, too low by 6% and about right by 73%.

Contact T. Newton (613-990-9832), Manufacturing and Primary Industries Division.

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## Help-wanted Index

The seasonally adjusted Help-wanted Index (1981=100) for Canada increased to 65 in October 1984 from 64 in September. By region, the Index increased in the Atlantic Provinces (to 191 from 127), Ontario (to 73 from 69) and the Prairie Provinces (to 39 from 34). The labour demand indicator declined in Quebec (to 65 from 76) and British Columbia (to 28 from 30).

The short term trend — an indicator which smooths irregular monthly fluctuations — remained stable in October.

Contact Horst Stiebert or Jean-Pierre Maynard (613-990-9900), Labour Division.

## New Motor Vehicle Sales

The slackening recorded last month in the annual rate of growth of auto sales in Canada continued in September 1984, as retail sales of all new motor vehicles sold totalled 83,367 units, up only 4.4% from the same month in 1983. Contributing to the slowing down was the drop in sales of North American manufactured passenger cars which fell 8.1% from the year-earlier figure to 44,017 units. Conversely, sales of North American built new commercial vehicles were 14.7% higher with 17,295 vehicles sold. Sales of passenger cars built overseas increased 40.2% from the same month last year to 18,928 units and were virtually boosted by the surge in sales of models manufactured in other countries (up 161.6% to 6,985 units). Sales of overseas commercial vehicles recorded a decrease of 8.4% with 3,127 units sold.

Adjusted for seasonal fluctuations and the number of selling days, unit sales of passenger cars built in North America (53,142 units) decreased 9.7% in September 1984 from August 1984. Seasonally adjusted sales of passenger cars made overseas (18,885 units) decreased 6.2% from the previous month, while total commercial vehicles (24,141 units) were 0.8% lower.

Order the September 1984 issue of *New Motor Vehicle Sales* (63-007, \$2.75/\$27.50), or contact Jean-Pierre Simard (613-990-9665), Retail Trade Section, Merchandising and Services Division.

## Estimates of Population

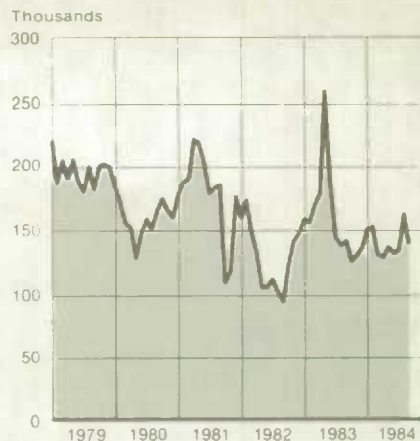
As of June 1, 1984, Canada's population was estimated to be 25,127,900, an increase of 786,200 or 3.2% from the 1981 population. Per cent increase was slightly greater among females at 3.4% than among males at 3.0% over the same period mainly due to higher male mortality.

By age, two trends are noticed: a declining child population under 18 years and an increasing adult population. Between 1981 and 1984, child population has continued to decrease by 3.3% for both males and females. During the same period, the elderly — those 65 years and older — continued to grow faster (8.3%) than those in the 18-64 age group (5.4%). The growth among elderly women was 9.3%, considerably higher than the 6.9% increase among elderly men. For those aged 18-64, the sex differential growth was very small at 5.5% for males and 5.3% for females. As a consequence of the above trends, the total dependency ratio (the proportion of population aged 0-17 plus those 65 and over to population aged 18-64) has been considerably reduced in 1984, registering 0.575 compared to 0.778 in 1971. These figures indicate that the economic burden borne by the adult population is less in 1984 than in 1971, although the percentage of elderly has increased.

Contact Lise Ofori-Attah (613-990-9579), Demography Division.

## Housing Starts in Canada

Seasonally Adjusted at Annual Rates



Source: Statistics Canada, Housing Starts and Completions

## The Composite Leading Indicator

The rate of growth of the leading indicator was considerably reduced in July, falling to +0.08% from +0.53% in June. The deceleration in the leading indicator since May reflects four successive drops in the non-filtered version. Based on past relationships and current trends, this deceleration is consistent with continued slow growth in production in the second half of the year. Weakness was evident in eight of the ten components of the non-filtered leading indicator, (which was off 1.6% in total in July). In particular, the leading indicators of manufacturing declined in line with the slowdown of United States demand since June and the weakening of consumer demand for durable goods in Canada.

Sales of furniture and appliances declined by 0.74%, the fifth decline in seven months, while the growth of auto purchases remained steady at the low rate of 0.55% (compared to 4.50% at the turn of the year).

The leading indicators of manufacturing activity in July reflected the slowdown in final demand since May, with a decline in new orders for durable goods (-0.54%) and a build-up of stocks of finished goods. A growing number of industries posted declines in orders, reflecting the increasing diffusion of the cyclical slowdown of demand.

The leading indicator for the United States weakened further in July, recording its first drop (-0.16%) since the expansion began in 1983. The upturn of interest rates in the United States appears to have contributed to the slower growth of aggregate demand. This weakening signals that the recent slowdown of non-automotive demand in the U.S. for Canadian goods will continue during the second half of the year.

Order *Current Economic Analysis* (13-004E, Canada: \$2.75/\$27.50; Other Countries: \$3.30/\$33), or contact D. Rhoades (613-990-9161), Current Economic Analysis Division, Statistics Canada, Ottawa K1A 0T6.



## Family Expenditure in Canada

Between 1978 and 1982, the average total expenditure by families and people living alone rose 45% from \$18,728 to \$27,062. Food, shelter, clothing and transportation accounted for 51% of spending in 1982. This percentage varied from 69% for families and unattached individuals with an income under \$10,000, to 42% for those receiving \$50,000 or more.

Order *Family Expenditure in Canada, 1982* (62-555, Canada: \$16.70, other countries: \$20), or contact Tom Greenberg (613-990-9781), Consumer Income and Expenditure Division.

## Gross Domestic Product

Gross Domestic Product (GDP) registered a 0.3% decline in August 1984. This followed a strong 1.2% upsurge in July and was the first drop since February of this year.

The decline in GDP originated from widespread decreases among both goods and service producing industries. Industrial production was down 0.5% in August, following a 3.5% increase in July.

Of the groupings by demand category, durable consumer goods registered a large increase in August, almost entirely as a result of an increase in motor vehicle manufacturing. Other categories rose only slightly or declined.

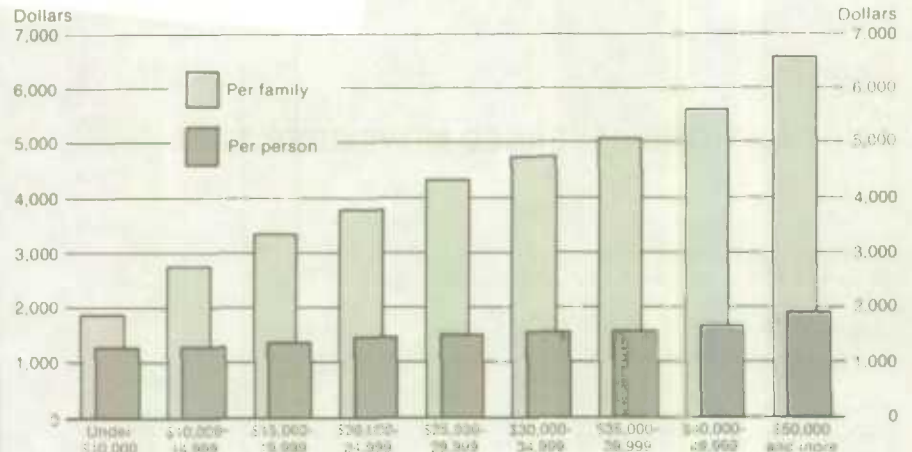
Major sources of weakness in August were the mining, trade and finance, insurance and real estate industries. Output gains were reported in community, business and personal services, public utilities, construction and forestry.

The mining industry experienced broad output declines in August, notably among iron ore, copper, nickel, lead and zinc production. The decline in non-metal mines was largely due to a drop in potash mining. The downturn in trade was entirely due to the decline of wholesale trade, as retail activity was unchanged from July. Insurance and real estate agencies also registered decreases, reflecting a fall in real estate sales. A drop in issues of new corporate stocks accounted for the decline in security brokers and dealers.

Although total manufacturing output was effectively unchanged from the high July level, many individual component industries recorded decreases which were offset by a few large increases. The major declines were in pulp and paper mills, iron and steel mills, some food product industries, and smelting and refining. Major output increases were recorded by manufacturers of motor vehicles, parts and accessories, and office and store machinery.

The decline in pulp and paper mills was due primarily to a fall in newsprint production, coinciding with a drop in export demand. Strikes in meat and fish products industries accounted for much of the decline noted in these activities. Agricultural production also recorded a decline.

## Food Expenditures per Family and per Person by Family Income, 1982



Source: Statistics Canada, Family Expenditure in Canada, 1982 (62-555)

## Department Store Sales

Department stores in Canada reported sales totalling \$947.9 million in September 1984, a 2.8% increase from a year earlier. Cumulative sales for January-August 1984 reached \$7,454.4 million, up 4.4% from the same period in 1983.

On a regional basis, department store sales in September were as follows (percentage change from August 1983 in parentheses):

- Ontario, \$341.4 million (+5.2%)
- Quebec, \$176.1 million (+6.7%)
- British Columbia, \$152.7 million (-4.2%)
- Alberta, \$128.3 million (-2.2%)
- Atlantic provinces, \$65.4 million (+5.6%)
- Manitoba, \$52.4 million (+7.5%)
- Saskatchewan, \$31.5 million (+1.6%).

Order the *September 1984 issue of Department Store Sales by Regions* (63-004, \$1.60/\$16), or contact the Retail Trade Section (613-990-9665), Merchandising and Services Division.

Motor vehicle manufacturing recorded its largest monthly increase since January 1983, possibly in part due to strike anticipation. Exports of automobiles and trucks climbed sharply in August. Production of parts and accessories rose for the fourth consecutive month.

Residential construction recorded its strongest monthly increase since June 1983. The greatest growth in work put in place was in single homes and apartment dwellings.

Gross Domestic Product increased 2.9% from December 1983 to August 1984. With the exception of consumer services, none of the consumer demand categories have shown much growth during 1984. During the same period, the construction and machinery and equipment categories enjoyed strong growth, with the rise in machinery and equipment due in large part to increased exports.

Order the *August 1984 issue of Gross Domestic Product by Industry* (61-005, \$3.85/\$38.50), or contact Ron Kennedy (613-990-9145), Industry Product Division.

## International Travel

In 1983, 13.5 million Canadian residents returned from an international trip, a 15.4% increase from 1982. Canadian tourist trips to the United States numbered 11.8 million, up 15.1% from the previous year. Canadian re-entries from all other countries increased 17.7% to 1.7 million.

By comparison, the total number of foreign tourists entering Canada in 1983 increased 2.5% to 12.5 million. Tourists from the United States numbered 10.9 million, a 4.3% increase from 1982, while travellers from all other countries declined 8.3% to 1.6 million.

Here are other highlights:

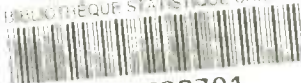
- In 1983, 57.3% of all overseas tourists were residents of Europe and 21.3% came from Asia. Travellers from other areas of the world represented smaller proportions of tourists visiting Canada, ranging from 5.7% from Bermuda and the Caribbean to 2.4% from Central and North America.
- Two-thirds of the total annual increase (15.1%) in the number of Canadian tourist trips to the United States occurred in the third quarter of the year.
- Total visits to Mexico by Canadian tourists increased 86.0% to 333,000 during 1983, while visits to Bermuda and the Caribbean decreased 11.6% from 1982 to 516,000.
- More than three-quarters of all American tourists visiting Canada were residents of New England or the Middle Atlantic, East North Central or Pacific regions.

Order *Travel Between Canada and Other Countries* (66-201, Canada: \$7.75), or contact Paul L. Paradis (613-990-8932).

## Labour Income

Labour income during August 1984 reached an estimated \$19,619.2 million, an increase of \$1,020.0 million or 5.5% from August 1983. Adjusted for seasonal variation, wages and salaries decreased \$62.2 million between July and August 1984 to \$17,605.2 million.

Order *Estimates of Labour Income* (72-005, \$5.55/\$22.20), or contact Mrs. Gauthier (613-990-9900).



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## PUBLICATIONS RELEASED NOVEMBER 2 — 8

	Cata- logue No.	In Canada: Price per issue/year	Elsewhere: Price per issue/year
<b>AGRICULTURE STATISTICS</b>			
Stocks of frozen meat products, October 1984	32-012	\$2.75/\$27.50	\$3.30/\$33
<b>BUSINESS FINANCE</b>			
Financial institutions: Financial statistics, Second Quarter 1984	61-006	\$8.35/\$33.40	\$10/\$40.05
<b>CONSTRUCTION</b>			
Housing starts and completions, August 1984	64-002	\$3.30/\$33	\$3.95/\$39.50
<b>CONSUMER INCOME AND EXPENDITURE</b>			
Family expenditure in Canada, 1982	62-555	\$22.25	\$26.70
<b>EXTERNAL TRADE</b>			
Imports by commodities, August 1984	65-007	\$5.55/\$55.50	\$6.65/\$66.50
Summary of external trade, August 1984	65-001	\$3.30/\$33	\$3.95/\$39.50
<b>INTERNATIONAL AND FINANCIAL ECONOMICS</b>			
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Corrugated boxes and wrappers, September 1984	36-004	\$1.60/\$16	\$1.90/\$19
Electric lamps, September 1984	43-009	\$1.60/\$16	\$1.90/\$19
Mineral wool including fibrous glass insulation, September 1984	44-004	\$1.60/\$16	\$1.90/\$19
Primary iron and steel, August 1984	41-001	\$2.75/\$27.50	\$3.30/\$33
Production and shipments of floor tiles, September 1984	47-001	\$1.60/\$16	\$1.90/\$19
Production of selected biscuits, Quarter ended September 1984	32-026	\$2.75/\$11	\$3.30/\$13.20
Production, sales and stocks of major appliances, September 1984	43-010	\$1.60/\$16	\$1.90/\$19
Production, shipments and stocks on hand of sawmills in British Columbia, August 1984	35-003	\$1.60/\$16	\$1.90/\$19
Shipments of solid fuel burning heating products, Quarter ended September 1984	25-002	\$2.75/\$11	\$3.30/\$13.20
<b>MERCHANDISING AND SERVICES</b>			
Department store sales by regions, September 1984	63-004	\$1.60/\$16	\$1.90/\$19
<b>PRICES</b>			
Construction price statistics, August 1984	62-007	\$3.30/\$33	\$3.95/\$39.50
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International air charter statistics, October-December 1983	51-003	\$5.55/\$22.20	\$6.65/\$26.60
Telephone statistics, 1983	56-202	\$3.30	\$3.95
<b>Service Bulletin</b>			
Aviation statistics Centre — Vol. 16, No. 10, Canadian air transport industry	51-004	\$1.60/\$16	\$1.90/\$19

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