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Weekly Bulletin

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Labour Force Information

Canada's seasonally adjusted unemployment rate for November 1984 was unchanged from that of the previous month, registering 11.3%. The seasonally adjusted participation rate increased by 0.1% to 65.1%, the employment/population ratio rose to 57.7% from the previous month's level of 57.6%.

Employment for the week ending November 17, 1984 was an estimated 11,108,000, an increase of 31,000 from October. Employment levels among males declined by 24,000 to 6,394,000, while the number of females employed rose 55,000 to 4,714,000. Full-time employment levels increased by 43,000 in November, totalling 9,410,000. Part-time employment declined by 14,000 to 1,699,000.

On a regional basis, employment increased by an estimated 4,000 in Manitoba, by 7,000 in Alberta and by 13,000 in British Columbia. Levels in the remaining provinces registered little change from the previous month.

The seasonally adjusted level of unemployment for November 1984 was virtually unchanged from October, rising 4,000 to an estimated 1,422,000. Unemployment was little changed by age category, registering 518,000 for those aged 15 to 24 and 90,000 for those 25 years and older.

By province, unemployment levels climbed by an estimated 11,000 in Quebec, 12,000 in Ontario and 4,000 in Saskatchewan. Unemployment declined by 11,000 in Alberta; little or no change was reported in the levels for the remaining provinces.

Seasonally adjusted unemployment rates for the provinces in November were as follows (percentage change from October in parentheses): Prince Edward Island, 12.8% (-0.8%); Nova Scotia, 13.6% (-0.5%); Manitoba, 8.5% (-0.2%); Alberta, 10.9% (-0.9%); British Columbia, 14.7% (-0.4%); Quebec, 13.1% (+0.3%); Ontario, 9.1% (+0.2%); and Saskatchewan, 8.7% (-0.3%). The unemployment rates were unchanged in Newfoundland and New Brunswick at 21.0% and 15.6% respectively.

Order the November 1984 issue of The Labour Force (71-001, \$3.85/\$38.50), or contact Ken Bennett (613-990-9448), Labour Force Survey.

LATEST MONTHLY STATISTICS

EMPLOYMENT, INCOME

			Previous Month	% Change From Year Ago
Average Weekly Earnings (\$)	Sept.	407.97	405.49	2.9
Labour Income (\$ million)	Aug.	19,619.2	19,734.7	5.5
Persons with Jobs (million)	Nov.*	11.05	11.15	2.4
Unemployed	Nov.*	1,355,000	1,305,000	4.5

INVENTORIES

Department Store (\$ million)	Sept.	3,325.5	3,434.7	0.5
Manufacturers' Owned (\$ million)	Sept.	32,685.4	32,644.6	8.6

ORDERS

Manufacturers' New Orders (\$ million)	Sept.	18,939.9	19,073.2	-12.8
Manufacturers' Unfilled Orders (\$ million)	Sept.	22,077.0	22,265.2	8.7

PRICES

Consumer Price Index (1981=100)	Oct.	123.2	123.0	3.4
New House Price Index (1981=100)	Oct.	94.8	94.8	0.0
Raw Materials Price Index (1977=100)	Oct.	212.5	213.4	0.6
Excl. coal, crude oil, nat. gas	Oct.	154.7	156.4	1.3
Industry Selling Price Index (1971=100)	Oct.	312.1	312.0	3.5

CONSTRUCTION

Building Permits (\$ million)	Sept.	1,120.2	11,328.1	4.0
Housing Starts — Urban Centres (units)	Oct.*	8,863	93,435	-17.9

ENERGY

Coal Production (thousand tonnes)	Sept.	4,871	41,684	30.7
Electricity Generation (terawatt hours)	Sept.	31.5	311.1	8.7
Natural Gas Production (million cubic metres)	Sept.	6,560	64,040	8.5
Petroleum Refining (million cubic metres)	Sept.	6.2	65.6	3.5

FOREIGN TRADE

Exports — Balance of Payments Basis (\$ million)	Oct.	10,244	93,765	27.2
Imports — Balance of Payments Basis (\$ million)	Oct.	8,241	77,484	29.5

PRODUCTION

Railway Carloadings (million tonnes)	Oct.*	22.6	201.3	17.4
Steel Ingots — thousand tonnes	Nov.*	1,208	13,483	15.6

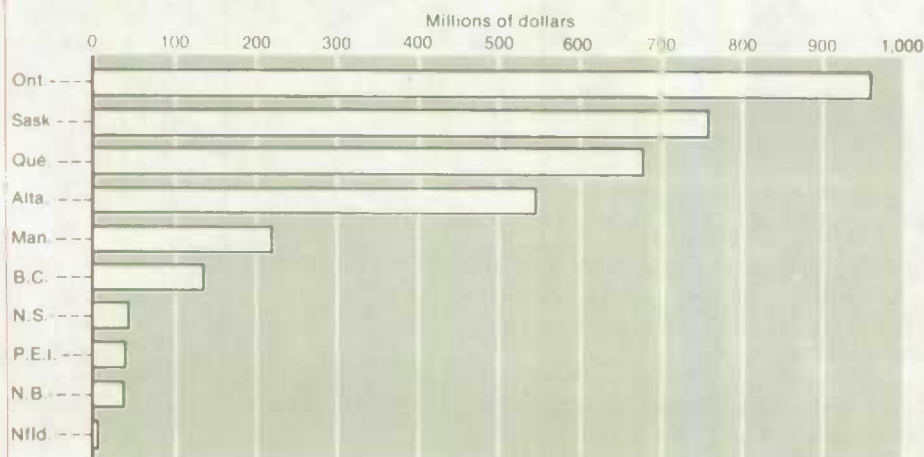
SALES

Department Store Sales (\$ million)	Sept.	947.9	7,454.4	4.4
Manufacturers' Shipments (\$ million)	Sept.	19,128.1	167,986.3	14.7
New Motor Vehicle Sales (\$ million)	Oct.	1,532.2	13,340.3	32.1
Retail Sales (\$ million)	Oct.*	9,846.0	92,553.7	8.8

Statistics are in current dollars and are not seasonally adjusted.

* - new this week.

Realized Farm Net Income by Province, 1983



Source: Statistics Canada, Farm Net Income (21-202)

Canada

Retail Trade

Unadjusted Sales

Preliminary estimates show total retail sales in Canada reached \$9,846.0 million in current dollars (not adjusted for inflation) in October 1984, a 9.0% increase over the October 1983 level.

Every kind of business reported higher sales in October 1984 compared to the levels of the previous year, with the exception of household appliance stores which registered a 5.2% decline in sales. The major gains were recorded for motor vehicle dealers (+24.8%), garages (+23.2%) and used car dealers (+12.5%).

At the provincial level, the only drop in retail sales recorded in October 1984 occurred in Saskatchewan, which registered a 0.6% decline from October 1983. The remaining regions posted increases.

Cumulative retail sales for the first 10 months of 1984 totalled \$92,553.7 million, up 8.8% over the same period of 1983.

Seasonally Adjusted Sales

Adjusted for seasonal fluctuations, holidays and the number of selling days, October 1984 retail trade estimates were 0.2% higher than the level of the previous month, rising to \$9,727.4 million from \$9,712.1 million. The most notable increases in October 1984 were recorded in motor vehicle dealers (+6.4%), household appliance stores (+5.7%) and general stores (+4.6%). Major declines were registered in women's clothing stores (-5.3%), all other food stores (-4.4%) and grocery, confectionery and sundries stores (-3.9%).

Order the October 1984 issue of Retail Trade (63-005, \$3.85/\$38.50), or contact Jean-Pierre Simard (613-990-9665), Retail Trade Section, Merchandising and Services Division.

Trusted Pension Funds

The book value of assets held in trusted pension funds was estimated to be nearly \$88.3 billion at the end of the second quarter of 1984. This represents an increase of \$2.5 billion over the assets of the previous quarter and \$11.1 billion more than the amount held one year earlier.

Bonds, accounting for 46% of total assets, continued to be the most prominent investment vehicle. Equity holdings stood at 25.8%, little changed in relative terms from the previous quarter, whereas mortgages continued their slow decline to 7.4% of total assets.

The total income for the second quarter of 1984 amounted to \$3.6 billion; 51% was investment income, 5% consisted of net gains on sales of securities and virtually all of the balance was made up of contributions by employees and employers. From this revenue, expenditures of \$1.048 million were met, leaving a net cash flow of nearly \$2.6 billion.

Order the second quarter 1984 issue of Quarterly Estimates of Trusted Pension Funds (74-001, \$2.75/\$11), or contact Hubert Frenken (613-990-9900), Pensions Section, Labour Division.

Industry Selling Price Index

Preliminary estimates show that the Industry Selling Price Index (ISPI) for manufacturing (1971=100) stood at 312.1 in October 1984, an insignificant increase from the revised level of 312.0 for September. The year-over-year advance, calculated by comparing the October 1984 level with the October 1983 level, fell to 3.5% — a continuation of the downward trend that began in March 1984. While the change for the month was negligible, there were substantial, though divergent, price movements in the major groups. Increases in the metal fabricating industry (0.5%), the paper and allied industries (0.3%) and miscellaneous manufacturing industries (0.8%) were almost completely offset by declines in the wood industry (-1.0%), the primary metals industry (-0.6%) and the food and beverage industry (-0.3%).

In October 1984, the percentages of industry indexes posting increases (55%), decreases (24%) and no change (21%) were comparable to the averages for the preceding three months.

Order the October 1984 issue of Industry Price Indexes (62-011, \$3.85/\$38.50), or contact the Information Unit (613-990-9615), Industrial Prices Section, Prices Division.

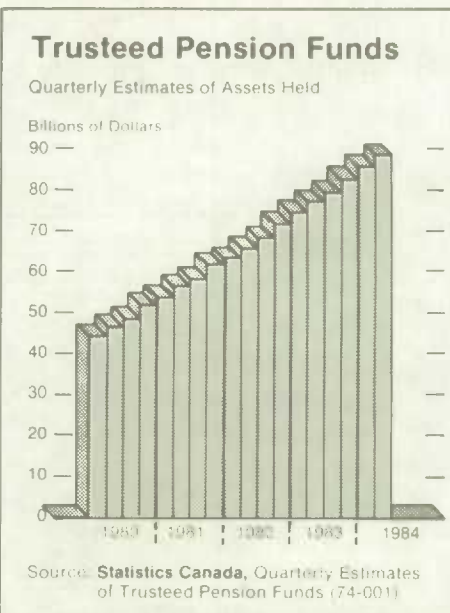
New Housing Price Index

The New Housing Price Index (1981=100) for Canada registered no overall change between September and October 1984, remaining at a level of 94.8. During the period, the estimated House Only index was unchanged at 97.2 while the estimated Land Only index decreased 0.2% to 90.7.

On a year-over-year basis, the New Housing Price Index registered no overall change between October 1983 and October 1984.

Between September and October 1984, the larger decreases in the New Housing Price Index were recorded for Victoria (-1.4%) and Vancouver (-0.9%). The most significant increases were recorded for Halifax (2.9%), Regina (0.6%) and Hamilton (0.5%).

Order Construction Price Statistics (62-007, \$3.30/\$33), or contact Prices Division (613-990-9601).



International Travel

Total Travellers

During October 1984, preliminary statistics show that an estimated 2.3 million United States residents entered Canada, an increase of 1.3% over October 1983. Visitors from other countries increased by 4.8% to 122,700.

Canadian residents re-entering the country following visits to the United States totalled 2.8 million, down 11.3% from October 1983. Canadians returning from visits to all other countries increased fractionally (0.2%) to 142,300.

The international travel flows during the first 10 months of 1984 were as follows:

- 29.2 million United States residents entered Canada, a 0.3% increase from January-October 1983;
- visitors from other countries increased by 6.0% to 1.7 million;
- Canadians returning from the United States decreased by 6.0% to 31.7 million;
- residents returning from other countries rose by 15.8% to 1.8 million.

Long-term Travellers

Preliminary estimates show that long-term tourist entries from the United States increased 1.9% to 740,000 in October 1984. Residents from other countries — excluding those arriving by land via the United States and intending to stay less than 24 hours — numbered 110,300, up 6.3% from last year. Canadian tourist re-entries from the United States declined 13.3% to 792,400, while residents returning from countries other than the United States increased by 0.2% to 142,300.

On a year-to-date basis, tourists to Canada from the United States increased by 3.7% to 10.8 million; tourists from other countries numbered 1.5 million, up 6.0% from last year. Canadian tourist re-entries from the United States numbered 9.7 million, down 8.5% from 1983, while residents returning from countries other than the United States increased by 15.8% to 1.8 million.

Order the October 1984 issue of International Travel — Advance Information (66-002, \$1.60/\$16), or contact Paul L. Paradis (613-990-8932), International Travel Section.

Estimates of Population

Canada's population on October 1, 1984 totalled an estimated 25,213,100. Population figures for the provinces and territories were as follows:

- Newfoundland, 579,700;
- Prince Edward Island, 125,900;
- Nova Scotia, 874,100;
- New Brunswick, 714,900;
- Quebec, 6,562,400;
- Ontario, 8,984,900;
- Manitoba, 1,060,500;
- Saskatchewan, 1,010,900;
- Alberta, 2,344,700;
- British Columbia, 2,882,800;
- Yukon, 22,400;
- Northwest Territories, 49,900.

Order Quarterly Estimates of Population for Canada and the Provinces (91-001, \$2.75/\$11), or contact Lise Ofori-Attah (613-990-9579), Demography Division.

Gross Domestic Product

Gross Domestic Product in September 1984 was unchanged from the August level of \$125.4 billion. Following a substantial 1.4% rise in July, economic activity slipped 0.4% in August, and subsequently showed no change in September. Industrial production advanced 3.6% in July, and was followed by declines of 0.5% and 1.9% in August and September.

Although overall activity was flat in September, there were pockets of growth which buoyed the economy during the month. The most significant output gains were reported in trade. In addition, the construction industry recorded one of the strongest monthly gains of the year.

The major drag on the economy in September came from manufacturing where output was down 2.2% compared to a decline of only 0.2% in August. Output of public utilities also showed a substantial decrease this month, as both electric power generation and natural gas sales dropped sharply.

Third Quarter 1984

Gross Domestic Product in constant (1971) prices increased 1.7% in the third quarter of 1984, following increases of 0.5% and 1.1% in the first and second quarters respectively. The most recent quarter began quite strongly, with GDP increasing sharply in July, followed by a modest drop in August and virtually no change in September. Most of the growth can be traced to goods-producing industries, which accounted for 65% of the increase in GDP.

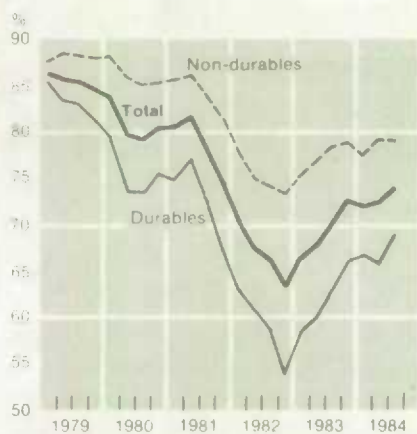
Economic growth in the third quarter was largely the result of an increase in exports. The seasonally adjusted volume index of total exports increased 8.6% over the level of the previous quarter. The growth in exports was the major contributor to production increases in such export-oriented industries as motor vehicle and motor vehicle parts manufacturing, pulp and paper and sawmills, iron and coal mines and electric power. Weaknesses in output of crude petroleum and natural gas, refined petroleum products and rubber and plastic products industries can be attributed to lower exports.

Another source of strength in the quarter was investment. Residential construction grew 4.6%, the strongest quarterly growth rate since the second quarter of 1983. A decline in sales of existing housing partially offset this increase to result in a 1.0% increase in residential construction investment in the GNP accounts. Non-residential construction was up for the second consecutive quarter. Exploration and development activity in mining increased 5.8%.

Mining industries experienced a 3.2% increase in output during the quarter. Increased production by iron mines and other metal mines was related to greater export demand and a 2.8% rise in the output of industries producing primary metals.

A substantial 12.8% increase in electricity exports helped to boost output of electric power utilities by 2.5%, the eighth consecutive quarterly increase in that industry.

Capacity Utilization Rates in Canadian Manufacturing



Source: Statistics Canada, Capacity Utilization Rates in Canadian Manufacturing (31-003)

Department Store Sales by Regions

Department stores in Canada reported sales totalling \$957.6 million in October 1984, a 3.9% increase from a year earlier. Cumulative sales for January-October 1984 reached \$8,411.9 million, up 4.4% from the level recorded during the same period in 1983.

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

- Ontario, \$347.1 million (+3.3%)
- Quebec, \$182.2 million (+5.2%)
- British Columbia, \$151.4 million (+3.1%)
- Alberta, \$127.3 million (+2.3%)
- Atlantic provinces, \$69.7 million (+9.8%)
- Manitoba, \$49.6 million (+4.5%)
- Saskatchewan, \$30.2 million (-1.6%)

Data users should note that the British Columbia figures include those for the Yukon and Northwest Territories.

Contact the Retail Trade Section (613-990-9665), Merchandising and Services Division.

Manufacturing industries were the most important source of strength this quarter, accounting for 40% of the GDP increase. Within manufacturing, most of the increase came from eight industries: motor vehicle manufacturing, office and store machinery, motor vehicle parts and accessories, pulp and paper, miscellaneous machinery, metal stamping, electrical industrial equipment and sawmills. Motor vehicle and parts manufacturing were responsible for almost one-fifth of the increase in GDP.

The expansion in the automotive sector came entirely through exports (the volume index of passenger autos and chassis exports grew 18.4%); domestic demand as reflected by the output of new motor vehicle dealers fell.

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

New Motor Vehicle Sales Unadjusted Sales

The mid-October strike in the auto industry did not seem to have a major impact on retail sales of new motor vehicles in Canada in October. There were 124,301 new models sold across the country during the month, a 24.2% rise over the same month of last year. This substantial gain offset the slackening in sales recorded for the previous two months in the annual rate of growth of auto sales and provides some signs of increasing confidence by Canadian consumers at this pre-Christmas time of the year. Sales of passenger cars made in North America and overseas increased 14.2% and 28.6% respectively over the corresponding month of 1983 to 67,739 and 24,287 units. With 32,275 units sold in October 1984, sales of commercial vehicles recorded their highest level since April 1981 and registered a 47.4% jump over October 1983 sales.

The market shares held by North American and Japanese manufacturers in October 1984 decreased to 73.6% and 19.1% respectively, from the 75.8% and 20.4% shares recorded in 1983. Manufacturers from all other countries held 7.3%, a net improvement from the 3.8% registered in October last year.

The total dollar value of all new motor vehicles sold in October increased 31.6% from a year earlier to \$1,532.2 million. North American passenger car sales reached \$766.5 million (up 18.4%) and commercial vehicles built in North America totalled \$442.0 million (up 61.4%). Sales of passenger cars manufactured overseas rose 35.5% to \$287.3 million, while commercial vehicle sales were 18.3% higher at \$36.4 million.

Order the October 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.

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Stocks of fruit and vegetables, November 1, 1984	32-010	\$1.60/\$16	\$1.90/\$19
The dairy review, October 1984	23-001	\$2.75/\$27.50	\$3.30/\$33
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Production, sales and stocks of major appliances, October 1984	43-010	\$1.60/\$16	\$1.90/\$19
Production, shipments and stocks on hand of sawmills in British Columbia, September 1984	35-003	\$1.60/\$16	\$1.90/\$19
Quarterly shipments of office furniture products, Quarter ended September 30, 1984	35-006	\$2.75/\$11	\$3.30/\$13.20
Specified domestic electrical appliances, October 1984	43-003	\$1.60/\$16	\$1.90/\$19
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Fruit and vegetable preservation , Vol. 13: No. 12, Pack of processed apricots; No. 2, Pack of processed raspberries, 1984	32-023	\$1.60/\$16	\$1.90/\$19
MERCHANDISING AND SERVICES			
Department store sales by regions, October 1984	63-004	\$1.60/\$16	\$1.90/\$19
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Aviation Statistics Centre , Vol. 16, No. 11, Canadian air transport industry, September 1984	51-004	\$1.60/\$16	\$1.90/\$19
Railway Transport , Vol. 14, No. 8, Railway carloadings, August 1984	52-004	\$1.60/\$16	\$1.90/\$19

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