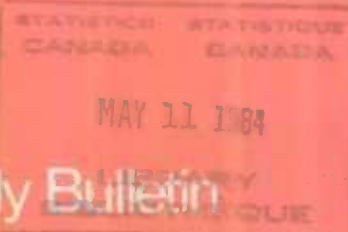


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Weekly Bulletin



May 11, 1984

Canada's Merchandise Trade

On a seasonally adjusted balance-of-payments basis, preliminary results indicate that Canada's total exports increased 7.1% or \$600 million to \$9.0 billion in March 1984, following a \$480 million decrease in February and increases of \$325 million in January and \$15 million in December 1983. Imports increased 8.5% or \$630 million to \$8.0 billion, after an increase of \$580 million in February, a \$140 million decline in January and a \$185 million increase in December 1983. As a result, the merchandise trade surplus narrowed by \$25 million to \$1.0 billion in March 1984, following a \$1,060 million drop in February, a \$465 million increase in January and a decline of \$170 million in December 1983.

In the first quarter of 1984, total exports increased 5.8% or \$1,450 million to \$26.3 billion, following increases of \$1,920 million in the fourth quarter of 1983, \$305 million in the third quarter and \$1,915 million in the second. Imports increased 9.1% or \$1,845 million to \$22.1 billion in the first quarter of 1984, after increases of \$1,330 million in the fourth quarter of 1983, \$1,625 million in the third quarter, and \$660 million in the second. The merchandise trade surplus

(continued on page 2)

New Housing Price Index

The New Housing Price Index (1981=100) increased 0.2% in March 1984 to 95.3 from 95.1 in February. This index of housing contractors' selling prices now stands 0.7% higher than the year-earlier level of 94.6.

Between February and March 1984, the largest increases in new housing prices were recorded for St. Catharines-Niagara (+2.0%), Saint John-Moncton (+1.9%) and Winnipeg (+1.1%). Decreases of 0.5% were reported in Calgary and Edmonton.

Between March 1983 and March 1984, the largest year-over-year price increase for new housing was recorded for Saint John-Moncton (+15.1%), followed by Ottawa-Hull (+11.1%), Montreal (+9.8%), Windsor (+7.7%), Thunder Bay (+7.4%), St. Catharines-Niagara (+7.1%), Quebec City (+6.5%), Winnipeg (+6.5%), London (+5.4%) and Hamilton (+5.3%). The largest year-over-year decline in new housing prices occurred in Calgary (-10.8%).

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

LATEST MONTHLY STATISTICS

EMPLOYMENT, INCOME

Average Weekly Earnings (\$)	Feb.	399.29	400.20	
Labour Income (\$ million)	Jan.	18,455.8	18,595.5	7.9
Persons with Jobs (million)	Mar.	10.60	10.56	2.8
Unemployed	Mar.	1,541.000	1,476.000	-7.9

INVENTORIES

Department Store (\$ million)	Feb.	3,146.5	3,058.2	17.1
Manufacturers' Owned (\$ million)	Feb.	31,550.4	31,227.3	2.0

ORDERS

Manufacturers' New Orders (\$ million)	Feb.	17,846.3	17,659.3	19.2
Manufacturers' Unfilled Orders (\$ million)	Feb.	21,009.6	20,788.8	28.4

PRICES

Consumer Price Index (1981=100)	Mar.	121.2	120.9	4.7
New House Price Index (1981=100)	Mar.	95.3	95.1	0.7
Raw Materials Price Index (1977=100)	Mar.	218.2	215.8	4.8
Excl. coal, crude oil, nat. gas	Mar.	164.2	160.3	10.3
Industry Selling Price Index (1971=100)	Mar.	308.1	306.6	4.4

CONSTRUCTION

Building Permits (\$ million)	Feb.	828.4	1,506.1	-0.6
Housing Starts — Urban Centres (units)	Mar.	6,195	21,540	-8.6

ENERGY

Coal Production (thousand tonnes)	Feb.	4,624	9,169	27.0
Electricity Generation (terawatt hours)	Feb.	36.2	77.7	10.3
Natural Gas Production (million cubic metres)	Jan.	10,482	10,482	5.8
Petroleum Refining (million cubic metres)	Feb.	7.2	15.1	6.7

FOREIGN TRADE

Exports — Balance of Payments Basis (\$ million)	Mar.	9,320	26,111	26.5
Imports — Balance of Payments Basis (\$ million)	Mar.	8,239	22,151	33.8

PRODUCTION

Railway Carloadings (million tonnes)	Apr.	19.3	74.0	19.9
Steel (ingots — thousand tonnes)	Mar.	1,336.7	3,771.6	42.0

SALES

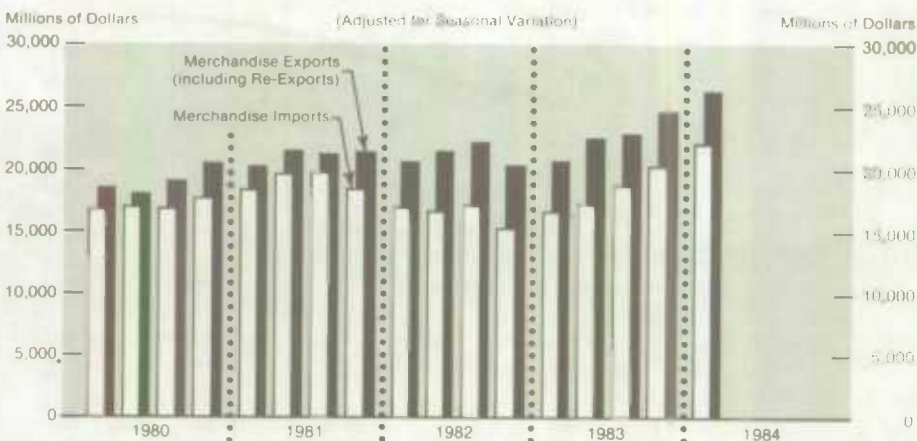
Department Store Sales (\$ million)	Mar.	806.7	2,115.4	5.0
Manufacturers' Shipments (\$ million)	Feb.	17,625.4	34,638.9	21.5
New Motor Vehicle Sales (\$ million)	Mar.	1,528.3	3,572.5	48.9
Retail Sales (\$ million)	Feb.	7,767.2	15,393.4	12.6

Statistics are in current dollars and are not seasonally adjusted.

* - new this week.

Canadian Merchandise Exports and Imports*

Quarter-by-Quarter Movements



* Balance of Payments Basis

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

Canada

... Canada's Merchandise Trade

retracted by \$400 million to \$4.2 billion in the first quarter of 1984.

Commodity Analysis

The largest increase in value for domestic exports in March 1984 (seasonally adjusted on a customs basis) was for passenger cars (up 19% or \$205 million to \$1,275 million, following a \$200 million decline in February, increases of \$190 million in January 1984 and \$210 million in December 1983). Other increases were for iron ores, concentrates and scrap (up 200% or \$105 million to \$155 million, after a \$95 million decrease in February and increases of \$15 million in January 1984 and \$90 million in December 1983) and precious metals (up 50% or \$85 million to \$260 million).

In March 1984, the largest import increase was for motor vehicle parts (up 16% or \$205 million to \$1,475 million). Other increases were for metal ores, concentrates and scrap (up 74% or \$80 million to \$190 million) and crude petroleum (up 19% or \$60 million to \$385 million, following a \$120 million increase in February and a \$345 million decline from October 1983 to January 1984).

Trading Partner Analysis

Canada's exports to the United States picked up again in March 1984 by registering a 12% or \$755 million increase to \$6,950 million, following a \$565 million decline in February and an overall \$1,420 million increase from June 1983 to January 1984. Exports to Japan, which had fluctuated narrowly from November 1983 to January 1984, declined \$120 million in February and increased \$10 million in March to a level of \$400 million. Exports to all other principal trading areas decreased.

Imports from the United States picked up again in March 1984 by registering an 11% or \$585 million increase to \$5,850 million, following a \$25 million decline in February and an overall \$1,260 million increase from March 1983 to January 1984. Other large increases were for imports from Japan (up 21% or \$85 million to \$485 million, after a \$35 million increase in February and a \$70 million decline in January) and "Other E.E.C." countries (up 14% or 60 million to \$510 million).

For further information, order the March 1984 issue of Summary of External Trade (65-001, \$3.30/\$33), or contact G. Blaney (613-995-6305), Trade Information Unit, or François Bordé (613-995-6115), Trade Measures and Analysis Section, External Trade Division, Statistics Canada, Ottawa K1A 0T6.

Urban Transit

Canadian urban transit systems (65) collected 131,872,789 initial passenger fares in March 1984. The total distance run was 64 326 105 kilometres and operating revenues amounted to \$75.5 million.

For further information, order the March 1984 issue of Urban Transit (53-003, \$1.60/\$16), or contact the head (613-995-1976), Surface Transport Unit.

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Weekly Bulletin

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Help-wanted Index

The Canada Help-wanted Index (1981=100) dropped to 43 in April 1984 from 58 in the preceding month (past experience shows that when the reference Saturday coincides with the Easter holiday, as in April, the volume of newspaper advertising decreases). The short term trend — which smooths the irregular fluctuations in the seasonally adjusted data — levelled off in April as a result of the decrease in the volume of help-wanted ads.

Help-wanted indexes declined in April in all regions except British Columbia. (In British Columbia the Help-wanted Index had to be imputed from past data because of a newspaper strike.)

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

International Travel

Preliminary statistics for March 1984 show that 1.7 million United States residents entered Canada, down 4.4% from a year earlier. Visitors from countries other than the U.S. declined by 3.7% to 69,000. Canadian residents re-entering this country after visits to the U.S. numbered 3.1 million, up 4.2% from March 1983, and residents returning from other countries increased by 34.2% to 227,000.

For the first quarter of 1984, the international travel flows were as follows: 4.6 million U.S. residents entered Canada, down 2.5% from January-March 1983; visitors from other countries increased by 5.2% to 181,000; Canadians returning from the U.S. increased by 6.1% to 8.0 million and resident re-entries from other countries numbered 599,000, up 26.6% from the 1983 period.

For further information, order the March 1984 issue of International Travel — Advance Information (66-002, \$1.60/\$16), or contact Paul L. Paradis (613-995-0847), International Travel Section, Statistics Canada.

New Motor Vehicle Sales

Retail sales of all new motor vehicles in March 1984 showed an increase of 23.8% from the same month a year earlier, rising to 128,129 units from 103,466 units. Sales of North American manufactured passenger cars increased by 24.5% over March 1983 to 73,712 units and commercial vehicle sales climbed 58.6% to 28,416 units. Sales of passenger cars manufactured overseas were 2.8% higher than in the same month last year with 22,639 units sold, while sales of imported commercial vehicles dropped by 22.6% to 3,362 units.

The share of the Canadian passenger car market held by North American manufacturers in March 1984 was 76.5%, up from 72.9% in March 1983. Japanese manufacturers took 18.0% of the market in March 1984 and manufacturers from other countries captured 5.5%, as compared to 22.4% and 4.7% shares in March 1983.

Total value of all new motor vehicles sold in March 1984 increased 34.3% from a year earlier to \$1,528.3 million — the highest total ever recorded. North American passenger cars sold for \$823.5 million (+31.9%) and commercial vehicles for \$410.0 million (+63.5%). Sales of passenger cars from overseas increased 16.7% to \$261.3 million, while those of commercial vehicles decreased by 15.0% to \$33.6 million.

In the first quarter of 1984, total sales in units posted an increase of 36.4% from the same quarter last year to reach 297,480 units valued at \$3,572.5 million (+48.9%).

For further information, order the March 1984 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 0T6.

Production of Raw Steel

Preliminary figures show steel ingot production rose 14.7% in April 1984 to 1 287 975 tonnes from 1 122 977 tonnes a year earlier.

For further information, order the April 1984 issue of Primary Iron and Steel (41-001, \$2.75/\$27.50), or contact G.W. Barrett (613-992-0388), Manufacturing and Primary Industries Division, Statistics Canada, Ottawa K1A 0T6.

Farm Lands/Buildings

The value of farm lands and buildings in Canada fell by 4% during 1983. Drops in value were posted in Ontario (-7%), Manitoba (-3%), Saskatchewan (-3%) and Alberta (-6%). Values increased in Quebec (+2%) and British Columbia (+3%), while they were unchanged in the Atlantic provinces.

Further information can be obtained by contacting May Holbein (613-995-4895), Agriculture Statistics Division.

Department Store Sales

Department stores in Canada had sales totalling \$806.7 million in March 1984, an increase of 2.4% from a year earlier. Cumulative sales for January-March 1984 amounted to \$2,115.4 million, up 5.0% over the year-earlier period.

Department store sales by regions for the latest month were as follows, with percentage changes from March 1983 in brackets:

- Ontario, \$282.9 million (+3.6%)
- Quebec, \$146.4 million (+6.4%)
- British Columbia, \$138.8 million (-1.1%)
- Alberta, \$116.5 million (-1.2%)
- Atlantic provinces, \$50.2 million (+0.1%)
- Manitoba, \$44.1 million (+2.2%)
- Saskatchewan, \$27.8 million (+10.0%)

Data users should note that the figures for British Columbia include as well those for the Yukon and Northwest Territories. See the March 1984 issue of *Department Store Sales by Regions* (63-004, \$1.60/\$16).

Trusted Pension Funds

The book value of assets held in trusted pension funds reached an estimated \$82.6 billion at the end of the fourth quarter of 1983, an increase of \$3 billion over the assets of the previous quarter and \$10.8 billion more than the amount held one year earlier.

Bonds accounted for 46.6% of total assets at the end of the fourth quarter and continued to be the most prominent investment vehicle. Equity holdings at 24.5% were slightly higher in relative terms than in the previous quarter, whereas mortgages continued their slow decline to 8.3% of total assets.

Total income of trusted pension funds for the fourth quarter of 1983 amounted to \$4.1 billion: 52% of this total was made up of investment income, 6% consisted of net gains on sales of securities and virtually all of the balance was made up of contributions by employees and employers. Out of this revenue, expenditures of \$971 million were met, leaving a net cash flow for the quarter of nearly \$3.2 billion.

For further information, order the fourth quarter 1983 issue of *Quarterly Estimates of Trusted Pension Funds* (74-001, \$2.75/\$11), or contact Hubert Frenken (613-995-7165), Pensions Section, Labour Division, Statistics Canada, Ottawa K1A 0T6.

Vital Statistics, 1983

In 1983, there were an estimated 372,920 births in Canada, which represents virtually no change from the 1982 total.

The estimated number of marriages in 1983 was 179,490, down 4.7% from the final count of 188,360 in 1982.

There were 175,760 deaths estimated to have occurred in 1983, up 0.8% from the final 1982 figure.

Further information can be obtained from Joan Lindsay (613-995-9593), Vital Statistics and Disease Registries Section, Health Division, Statistics Canada, Ottawa K1A 0T6.



Market Research Handbook

Still available are a limited number of copies of the *Market Research Handbook*. The 1983 revised edition of the Handbook — the latest issue of one of the Bureau's perennial best-sellers — provides the most comprehensive array of Canadian marketing information available in a single volume. The 803-page publication, which contains some 278 tables and 45 charts, can be used for analysis of markets of all sizes, ranging from local or regional to national in scope.

The Handbook brings together a wide selection of the data most needed by market specialists for sound decision-making. In order that trends can be identified, the publication includes data for previous years tabulated with the most recent statistics. Where possible, projections of population, family and household growth and international comparisons are included. For local market analysts, many of the key data series are available for Canada's 24 census metropolitan areas and 35 census agglomerations, which represent more than 60% of the country's population.

For anyone interested in assessing the dynamics of the marketplace, such as population growth, demographic trends, income distribution and changes in consumption patterns, the *Market Research Handbook, 1983 Revised Edition* should prove invaluable. Copies of the publication (catalogue 63-224; Canada: \$31.80; other countries: \$38.15) are available from Publication Sales and Services, Statistics Canada, Ottawa K1A 0T6, or any of the Bureau's regional reference centres.

Current Economic Analysis

The moderation of the rate of recovery that became evident in the fourth quarter of 1983 should continue in the first quarter of 1984, as the increase of employment in the Labour Force Survey weakened to 0.2% during the first quarter and as the sources of economic growth narrowed. The major components of final domestic demand grew rapidly in January, but inventories fell sharply in January and stocks and sales appear to have declined in February. External demand — notably for motor vehicle products — continues to be the principal source of growth of economic activity. Given the export-led nature of the recovery to date, a slowing of growth in the United States economy suggests that the rate of recovery may not be sufficient to reduce unemployment substantially in the first half of the year.

The slackening of employment growth and the upturn of unemployment in the first three months of 1984 were reflected in a further narrowing of the regional gains in labour demand. Whereas most of the fourth quarter gain in employment originated in Central Canada, the first quarter increase was limited to marginal gains in Quebec. The downward trend continued for Western Canada, partly as a result of weak business investment and primary sector activity in this region. Lower employment was particularly evident in British Columbia, accentuated by labour disputes in February and March. The slackening of employment was extended to Ontario in the first quarter, following steady gains in 1983.

The more moderate rate of expansion should act to restrain upward pressures on prices. Inflation turned up early in the new year, primarily as a result of higher food prices due to crop damage in the southeastern United States. As well, there has been an upturn for metal- and wood-related commodity prices the extent of these increases, however, may be limited by a more gradual rate of expansion in the United States economy, and by competition from less-developed countries. There is no indication of an upturn of wages similar to that for prices, as negotiated wage settlements in the fourth quarter continued to decelerate. Contract negotiations for the record number of workers who will renegotiate in 1984 will be conducted in an economic situation characterized by weak demand and real income declines.

The rate of growth of the Canadian leading indicator accelerated slightly in January (+1.21%). The upturn, however, originated in the growth of auto activity in the manufacturing sector which contributed most of the 2.8% increase in the non-filtered version in January. Declines continued to spread within the indicators of domestic demand, and the contribution of the U.S. leading index declined slightly. Output in the first quarter should be dominated by higher auto sales, which accounted for most (54%) of the growth of the index in January.



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Report on Livestock Survey, Pigs, April 1, 1984	23-008	\$4.40/\$17.60	\$5.25/\$21.10
Stocks of Fruit and Vegetables, April 1, 1984	32-010	\$1.60/\$16	\$1.90/\$19
CANADIAN CENTRE FOR JUSTICE STATISTICS			
Service Bulletin			
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Housing Starts and Completions, January 1984	64-002	\$3.30/\$33	\$3.95/\$39.50
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