

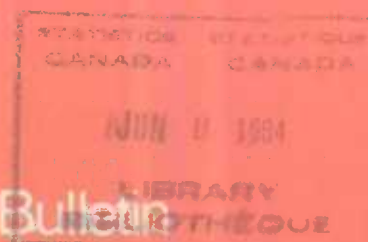


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Weekly Bulletin



June 8, 1984

## Department Stores

Department store sales were \$806.7 million in March 1984, up 2.4% over the March 1983 level. Increases from a year earlier were posted in six provinces — with advances ranging from 10.0% in Saskatchewan to 2.2% in Manitoba — while in the Yukon and Northwest Territories, sales rose by 5.2%. Lower sales were recorded in Newfoundland (-5.7%), New Brunswick (-1.4%), Alberta (-1.2%) and British Columbia (-1.2%).

The unadjusted selling value of inventories held by department stores was \$3,398.4 million, an increase of 13.2% over the same month a year earlier.

Final estimates for 1983 show department stores sales — the fourth largest component of retail trade in Canada according to the kind of business classification — registered a notable 7.1% gain over 1982, rising to \$10,930.5 million in current dollars from \$10,208.1 million. (This followed a sales decline of 0.1% in 1982.)

At the provincial level, department store sales in 1983 increased from year-earlier levels in all provinces except the Yukon and Northwest Territories (-6.0%). Increases ranged from 17.1% in Nova Scotia to 1.6% in Alberta.

For further information, order the March 1984 issue of *Department Store Sales and Stocks* (63-002, \$3.30/\$33), or contact Jean-Pierre Simard (613-996-9304), Retail Trade Section, Merchandising and Services Division, Statistics Canada, Ottawa K1A 0T6.

## Farm Income

Farmers' realized net farm income in 1983 totalled \$3.5 billion, down 4% from the revised 1982 level of \$3.6 billion. Total net income — which takes into account the value of inventory change — fell sharply to \$2.9 billion in 1983, a drop of more than 24% from 1982. Thus, 1983 was the second consecutive year of falling realized and total net farm incomes.

Total farm cash receipts (including supplementary payments) declined slightly to \$18.7 billion in 1983 from \$18.8 billion in 1982.

Preliminary 1983 and revised 1982 estimates are available on CANSIM. For further information, contact Steven Danford or George Beelen (613-995-4895), Agriculture Statistics Division, Statistics Canada, Ottawa K1A 0T6.

## LATEST MONTHLY STATISTICS

### EMPLOYMENT, INCOME

Average Weekly Earnings (\$)	Mar.	400.17	398.71	4.9
Labour Income (\$ million)	Feb.	18,447.3	18,446.6	7.8
Persons with Jobs (million)	Apr.	10.67	10.60	2.5
Unemployed	Apr.	1,468,000	1,541,000	-7.2

### INVENTORIES

Department Store (\$ million)	Mar.	3,398.4	3,146.5	13.2
Manufacturers' Owned (\$ million)	Mar.	31,985.4	31,692.5	3.5

### ORDERS

Manufacturers' New Orders (\$ million)	Mar.	19,788.2	17,785.2	17.2
Manufacturers' Unfilled Orders (\$ million)	Mar.	21,364.2	21,017.6	32.4

### PRICES

Consumer Price Index (1981=100)	Apr.	121.5	121.2	4.9
New House Price Index (1981=100)	Apr.	95.5	95.3	1.1
Raw Materials Price Index (1977=100)	Apr.	218.1	217.9	3.3
Excl. coal, crude oil, nat. gas	Apr.	164.4	164.3	7.3
Industry Selling Price Index (1971=100)	Apr.	310.3	308.7	4.4

### CONSTRUCTION

Building Permits (\$ million)	Mar.	960.5	2,479.1	-15.5
Housing Starts — Urban Centres (units)	Apr.	9,051	30,591	-15.0

### ENERGY

Coal Production (thousand tonnes)	Mar.*	4,674	13,893	29.7
Electricity Generation (terawatt hours)	Mar.*	37.8	117.7	9.9
Natural Gas Production (million cubic metres)	Mar.*	7.9	25.3	6.2
Petroleum Refining (million cubic metres)	Mar.	7.3	22.6	7.7

### 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)	Apr.	1,288	5,055	33.8

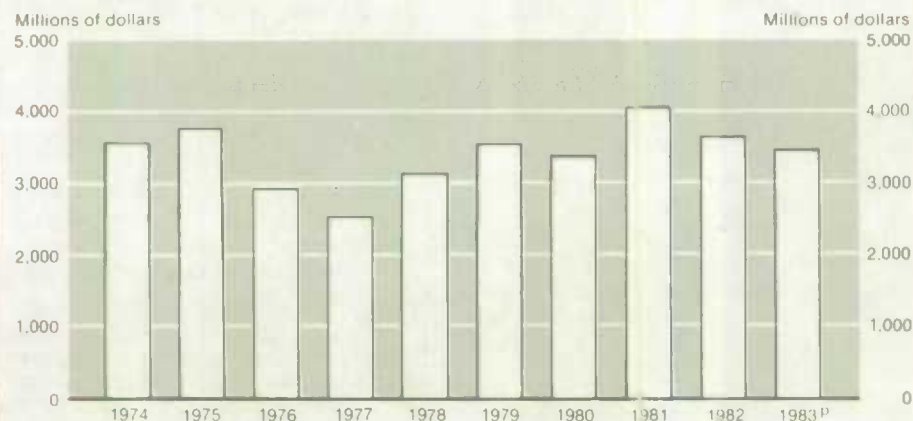
### SALES

Department Store Sales (\$ million)	Mar.	806.7	2,115.4	5.0
Manufacturers' Shipments (\$ million)	Mar.	19,441.6	53,978.6	19.0
New Motor Vehicle Sales (\$ million)	Mar.	1,528.3	3,572.5	48.9
Retail Sales (\$ million)	Mar.*	9,026.4	24,517.2	11.3

Statistics are in current dollars and are not seasonally adjusted.

\* - new this week.

## Canadian Farmers' Realized Net Farm Income\*



\* Excluding the Territories

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

p - Preliminary

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## Weekly Bulletin

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### International Travel

Preliminary statistics for April 1984 show that 2.0 million United States residents entered Canada, down 1.5% from a year earlier. Visitors from other countries increased by 15.8% to 112,000. Canadian residents re-entering this country after visits to the U.S. numbered 3.3 million, down 3.2% from April 1983, while residents returning from other countries decreased by 1.6% to 159,000.

For the first four months of 1984, the international travel flows were as follows: 6.6 million U.S. residents entered Canada, down 2.2% from January-April 1983; visitors from other countries increased by 9.0% to 293,000; Canadians returning from the U.S. increased by 3.2% to 11.3 million, and resident re-entries from other countries numbered 758,000, up 19.4% from 1983.

For further information, order the April 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, Ottawa K1A 0T6*.

### New Housing

The New Housing Price Index (1981=100) increased 0.2% in April 1984 to a level of 95.5 from 95.3 in March. This index of housing contractors' selling prices now stands 1.1% higher than the year-earlier level of 94.5. In April, the estimated House Only Index increased 0.2% to 98.0, while the estimated Land Only Index increased 0.1% to 91.0.

Between March and April 1984, the largest increase in new housing prices was recorded in Ottawa-Hull (1.9%). Between April 1983 and April 1984, the largest increase was recorded for Saint-John-Moncton (11.7%).

For further information, order *Construction Price Statistics* (62-007, \$3.30/\$33), or contact Prices Division (613-996-3744), *Statistics Canada, Ottawa K1A 0T6*.

### Energy Statistics

Preliminary figures for the first quarter of 1984 show that production levels of all the main energy forms were higher than those recorded during the same period of 1983.

Crude oil production during January-March 1984 amounted to 21 953 million litres, up 10.3% from the first quarter 1983 level. Exports of crude oil climbed 26.7% in the latest period and were at about the same level as imports (up 26.0%).

Refineries showed an increase in their activities during the first quarter of 1984: refinery receipts of crude oil were up 9.0% to 21 966 million litres, while production of refined petroleum products (gasolines, fuel oils, etc.) increased 7.6% to 22 621 million litres.

Sales of refined petroleum products in Canada showed only a small 2.5% increase, though, rising to 19 686 million litres in the latest period. Refinery inventories increased slightly. Net exports of refined petroleum products also rose.

Production of natural gas (net withdrawal at the wells) reached 25 267 million cubic metres during the first quarter of 1984, up 6.2% from the year-earlier level.

For further information, contact Richard Godin (613-996-3139), *Energy Section, Manufacturing and Primary Industries Division, Statistics Canada, Ottawa K1A 0T6*.

### Life Expectancy

Life expectancy at birth for Canadians is 71.88 years for males and 78.98 years for females, according to life tables for the years 1980-1982.

Tables appear in the publication *Life Tables, Canada and Provinces, 1980-1982* (catalogue 84-532, \$6.65). For further information, contact D. Nagnur (613-995-5963), *Research and Analysis Division*, or J. Lindsay (613-995-9593), *Vital Statistics and Disease Registries Section, Health Division, Statistics Canada, Ottawa K1A 0T6*.

### Unemployment Insurance

Payments made to unemployment insurance claimants in March 1984 totalled \$950 million, down 3% from February and a 17% drop from the \$1.15 billion paid in March 1983 (an all-time high for this month). Benefits for the first quarter of 1984 amounted to \$2.96 billion, down 7% from the \$3.20 billion paid out in January-March 1983. The average weekly payment rose to \$162 in March 1984, up 4% from a year earlier.

Some 1,349,000 persons received benefits for the week ended March 17, a decrease of 1% from the previous month and 11% fewer than the 1,514,000 beneficiaries recorded in March 1983.

Persons applying for benefits in March filed 248,000 claims, down slightly from both the previous month and March 1983. For January-March 1984, overall claims were down 2% from 1983 to 889,000, although claims increased in the Atlantic provinces, Quebec and British Columbia.

For further information, order the *Statistical Report on the Operation of the Unemployment Insurance Act* (73-001, Quarterly, \$6.65/\$26.60), or contact H. Stiebert (613-995-7165, Ext. 238), *Labour Division*.

### Retail Trade

Total March retail sales without seasonal adjustment recorded an increase of 9.1% over the same month last year to \$9,026.8 million in current dollars.

All provinces and territories recorded higher retail sales in March than in the same month the previous year, with gains ranging from 14.8% in Prince Edward Island to 2.0% in Alberta.

Cumulative retail sales for the first three months of 1984 were \$24,517.2 million, up 11.3% over the same quarter last year.

For further information, order the March 1984 issue of *Retail Trade* (63-005, \$3.85/\$38.50), or contact Jean-Pierre Simard (613-996-9304), *Retail Trade Section*.

### Charting Canadian Incomes, 1951-1981

*Charting Canadian Incomes 1951-1981*, released by Statistics Canada, confirms that the period from 1951 to 1981 was a time of great change for the Canadian family in terms of its income. For instance, from 1951 to 1976 the average income of families and unattached individuals increased steadily. Since 1976, however, gains in real income have levelled off.

The study reveals that in 1951 the average family had one wage earner for every three family members. By 1981, there was one wage earner for every two family members. In 1981, 60% of families had two or more earners, almost twice the percentage of 1951. On average, working wives earned 20% of family income in 1981, as compared to 10% in 1967.

From 1951 to 1981, social benefit programs have become very important sources of income, particularly for elderly unattached individuals and single parent families headed by females.

The report also studies the effects of age, sex, family size and regional differences on income.

Copies of *Charting Canadian Incomes 1951-1981* (Catalogue 13-581E; Canada: \$6.65; other countries: \$7.95) are available from Publication Sales and Services, Statistics Canada, Ottawa K1A 0T6, or any of the Bureau's regional reference centres. For further information, contact R. Chawla (613-996-5271), *Consumer Income and Expenditure Division*, or Pat Parkhill (613-993-7644), *Federal and Media Relations Division, Statistics Canada, Ottawa K1A 0T6*.



## Current Economic Analysis Monthly Review

The leading and coincident indicators that became available in May signalled that the economy grew more slowly in the first quarter than in fourth quarter last year. Low rates of growth will likely persist for several months at least.

External demand — which has provided most of the strength in recent quarters — appears to have lost some vigor. The already weak growth of domestic demand appears to have persisted, further constrained by the recent upturn of interest rates. The sluggishness of domestic demand has been reflected in employment and real incomes since December. In particular, the evident slowdown of household demand for retail goods and housing led to a reduction of manufacturing stocks in the first quarter and encouraged ongoing restraint in fixed investment.

The renewed moderation of the Consumer Price Index in March and April, after an acceleration at the turn of the year, may provide some offset to these negative influences. Nevertheless, a drop in the longer-term leading indicators — notably in financial markets — suggests that the slowdown will continue beyond the first half of 1984.

The moderation of the rate of growth that became evident in a 0.9% gain in real Gross National Product in the fourth quarter of 1983 continued in the first quarter of 1984.

Domestic demand has been little changed since the third quarter of 1983, remaining about 2% below its pre-recession peak. Following the lacklustre performance of final domestic demand in the last quarter of 1983, manufacturing firms began slowing output to inhibit a build-up of stocks. As a result, restrained inventory investment largely counterbalanced the first quarter gain in final domestic demand.

The circular nature of this weakness was particularly evident in labour market data over this period. Because of the restraint in new hiring — notably evident in the dearth of full-time jobs since September 1983 — gains in labour income remained muted, while the continued high level of unemployment reinforced this dampening influence on labour income via restrained wage demands.

Consumer confidence, according to the Conference Board, was little changed at 110.8 in the first quarter of 1984 after declining sharply in the last quarter of 1983. The survey, taken in mid-March, preceded the recent increases in interest rates, but does reflect increased nervousness over labour market conditions.

For the detailed analysis as well as a news summary of major domestic and international developments and extensive analytical charts and tables, order *Current Economic Analysis* (113-004E, Canada: \$2.75/\$27.50; other countries: \$3.30/\$33). For further information, contact D. Rhoades (613-992-4441), Current Economic Analysis Division, Statistics Canada, Ottawa K1A 0T6.

## Balance of Payments

Current account transactions, on a seasonally adjusted basis, gave rise to a small deficit of \$147 million in the first quarter of 1984 compared to a slight \$39 million surplus in the previous quarter. This was due to higher payments of dividends, following unusually low payments in the previous quarter. The surplus on merchandise trade remained high, increasing marginally from the previous quarter.

In short-term capital transactions, large net borrowings abroad by banks were paralleled by investments abroad of a similar magnitude by the non-banking sector. There was, however, a shift to a net inflow in total short-term transactions due to borrowings from foreign banks and Canadian dollar deposits at banks.

This pattern for short-term transactions differed from long-term transactions where the sizeable net inflow of the previous quarter was replaced by a small net outflow. This was due, among other things, to lower sales abroad of new bond issues.

Net official monetary assets were reduced substantially following downward pressure on the Canadian dollar, which, by the end of the first quarter, had fallen to its lowest level since July 1982.

For further information, contact L. Laliberté (613-996-2545), Balance of Payments Division, Statistics Canada, Ottawa K1A 0T6.

## Industry Selling Price Index

Preliminary estimates show that the Industry Selling Price Index (ISPI) for manufacturing (1971=100) stood at 310.3 in April 1984, up 0.5% from the revised level of 308.7 for March. With this increase, the year-over-year advance — from April 1983 to April 1984 — was 4.4%, a rate similar to those recorded since January 1984. The 0.5% monthly change was due primarily to increases in paper and allied industries (+3.3%), food and beverage industries (+0.5%), metal fabricating industries (+0.9%) and tobacco products industries (+2.9%).

For further information, order the April 1984 issue of *Industry Price Indexes* (62-011, \$3.85/\$38.50), or contact the Information Unit (613-995-5738), Industrial Prices Section, Prices Division, Statistics Canada, Ottawa K1A 0T6.

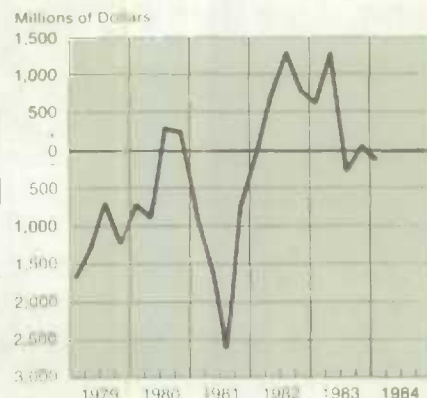
## Raw Materials

The Raw Materials Price Index (1977=100) rose to a preliminary 218.1 in April 1984, up 0.1% from the revised March level of 217.9. The main contributors to the monthly change were the indexes for animals and animal products (up 1.3%), vegetable products (down 2.2%) and non-ferrous metals (down 0.9%). Over the 12-month period between April 1983 and April 1984, the Raw Materials Price Index increased 3.3%.

For further information, order the April 1984 issue of *Industry Price Indexes* (62-011, \$3.85/\$38.50), or contact the Information Unit (613-995-5738), Industrial Prices Section, Prices Division, Statistics Canada, Ottawa K1A 0T6.

## Canadian Balance of International Payments

Current Account — Seasonally Adjusted



Source: Statistics Canada, Quarterly Estimates of the Canadian Balance of International Payments (67-001)

## Gross Domestic Product

On a seasonally adjusted basis, Gross Domestic Product in constant 1971 prices recorded a 0.2% gain in March 1984, advancing to an output level of \$121.4 billion at annual rates from \$121.2 billion. (The economy had advanced 1.1% in January before a 1.0% February drop.) In March, GDP was 7.1% above the lowest point of the recession in December 1982 but still 1.2% below the pre-recession peak of June 1981.

The March production gain stemmed mainly from modest increases in three sectors: construction, community, business and personal services and public utilities. However, the increases in these areas were partly offset by output declines in manufacturing, transportation services and retail trade.

Gross Domestic Product increased 0.6% in the first quarter of 1984 to \$121.7 billion at annual rates, a rate comparable to the fourth quarter of 1983, when the economy grew by 0.7%.

The advances in the two most recent quarters were much slower than the 1.9% average gains posted in the first three quarters of 1983.

For further information, order the March 1984 issue of *Gross Domestic Product by Industry* (61-005, \$3.85/\$38.50), or contact Ron Kennedy (613-995-0568), Industry Product Division, Statistics Canada, Ottawa K1A 0T6.

## Farm Capital, 1983

The value of farm capital declined by 3.3% in 1983 to \$127.3 billion from the revised 1982 level of \$131.7 billion.

For further information, contact May Holbein (613-995-4895), Agriculture Statistics Division, Statistics Canada, Ottawa K1A 0T6.



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