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Weekly Bulletin



July 27, 1984

Canadian Leading Indicator

April's Composite Leading Index has the pace of economic growth continuing into the second quarter at the more moderate rate registered January through March. Prospects for growth July through December remain more problematic, as declines were recorded for those components with the longest lead times. The Index eased slightly to 1.12% from 1.24% last month, and the non-filtered version was virtually unchanged in the month at 160.4. Growth continued to be concentrated in the motor vehicle component, which has assumed a dominant role in economic growth since the fourth quarter of 1983, and to a lesser extent in export demand and the proxy of profit margins. The slowing trend of the economy was most evident in the components related to domestic demand, manufacturing production and financial markets.

The outlook for consumer demand remained uninvigorating, despite signs of an increase in labour income in the second quarter, as furniture and appliance sales edged up 0.27% and the growth of new motor vehicle sales slowed sharply for the third straight month, from 2.58% in March to 1.02% in April. The downturn of the index of residential construction was more pro-

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LATEST MONTHLY STATISTICS

EMPLOYMENT, INCOME

Average Weekly Earnings (\$)	May*	401.97	399.69	4.0
Labour Income (\$ million)	Apr.	18,693.0	18,447.5	5.9
Persons with Jobs (million)	June	11.32	11.01	2.2
Unemployed	June	1,362,000	1,460,000	-6.6

INVENTORIES

Department Store (\$ million)	May	3,341.9	3,604.9	6.1
Manufacturers' Owned (\$ million)	May	32,609.5	32,471.3	8.2

ORDERS

Manufacturers' New Orders (\$ million)	May	20,349.4	18,482.0	18.7
Manufacturers' Unfilled Orders (\$ million)	May	21,977.0	21,476.6	34.3

PRICES

Consumer Price Index (1981=100)	June	122.2	121.7	4.1
New House Price Index (1981=100)	May	95.5	95.5	1.3
Raw Materials Price Index (1977=100)	May	218.0	218.4	3.2
Excl. coal, crude oil, nat. gas	May	164.0	164.8	6.6
Industry Selling Price Index (1971=100)	May	310.6	310.3	4.1

CONSTRUCTION

Building Permits (\$ million)	Apr.	1,331.0	4,004.5	-12.8
Housing Starts — Urban Centres (units)	Apr.	9,051	30,591	-15.0

ENERGY

Coal Production (thousand tonnes)	Apr.	4 275	18 170	28.5
Electricity Generation (terawatt hours)	Apr.	33.4	149.8	9.7
Natural Gas Production (million cubic metres)	Apr.	7.2	32.5	7.1
Petroleum Refining (million cubic metres)	May	7.0	35.7	10.0

FOREIGN TRADE

Exports — Balance of Payments Basis (\$ million)	May	10,311	45,589	27.3
Imports — Balance of Payments Basis (\$ million)	May	8,555	38,442	33.9

PRODUCTION

Railway Carloadings (million tonnes)	May	22.5	96.5	20.7
Steel (ingots — thousand tonnes)	June	1 243	7 581	27.0

SALES

Department Store Sales (\$ million)	May	927.8	3,885.9	7.0
Manufacturers' Shipments (\$ million)	May	19,849.0	92,239.1	17.8
New Motor Vehicle Sales (\$ million)	May	1,683.2	6,727.1	39.2
Retail Sales (\$ million)	May	10,103.5	43,806.1	11.1

Statistics are in current dollars and are not seasonally adjusted.

* — new this week.

U.S.—Canada Trade, 1983

Reconciliation of merchandise trade data for Canada and the United States shows Canada had an estimated US\$11.7 billion surplus in trade between the two countries in 1983. This marks a new record surplus for Canada, up US\$2.0 billion from the previous record surplus of US\$9.7 billion in 1982.

The higher surplus in 1983 was due to a larger increase in exports (+US\$7.0 billion) than in imports (+US\$5.0 billion). In 1982, it stemmed from a US\$6.5 billion drop in Canadian imports from the United States.

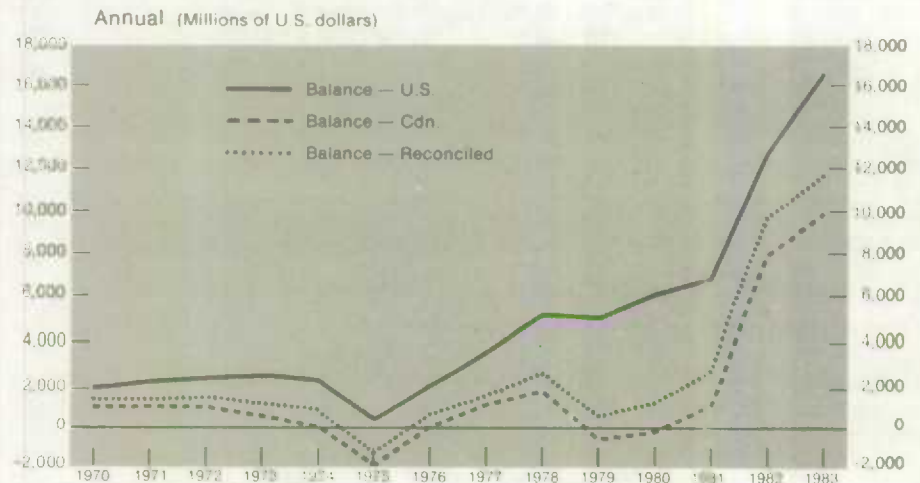
The significant reconciliation adjustments in 1983 were as follows:

- An addition of \$5.1 billion (13.3%) to United States exports, representing a residual estimate for non-receipt of export documents. In 1982, there had been a \$4.2 billion adjustment.

- A corresponding Canadian non-response adjustment of \$1.5 billion (2.7%). This adjustment is the same as in 1982.

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Merchandise Trade Balance Between the U.S. and Canada



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... Canadian Leading Indicator

nounced in April (-0.79%) than last month, and further weakness can be anticipated in light of the steady slide into May of residential building permits issued in all areas of Canada outside Ontario. In turn, the weak outlook for new housing construction augurs continued slack demand for furniture and appliances. The cautious stance of consumers to boosting outlays reflects the downturn of consumer confidence that began late in 1983, and the increase in interest rates and unemployment in the second quarter.

Other significant factors in summary include:

- The leading indicators of manufacturing activity continued to slacken in April, as new orders and the average work week declined marginally.
- The percent change of price per unit labour cost, a proxy for profit margins, continued to advance steadily (up 0.08 to +1.03%), with the 1.03% growth being the most rapid on record in the post-war era, as this component has contributed the most to the growth of the index in the current recovery.
- Prospects remained encouraging for growth in external demand, as the leading index for the United States rose 0.59%.
- The financial market indicators continued to sag as the real money supply (M1) declined marginally (-0.05%) and the Toronto Stock index dropped by 1.76% (the non-filtered version of stock prices fell by 3.9% in April.)

For further information, 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*.

Numbers Change for Statistics Canada Inquiries/Sales

The telephone number for the Statistics Canada Inquiries Service has changed to 613-990-8116 from 613-992-4734, and that for the Sales Unit has changed to 613-990-8114 from 613-992-3151, effective July 13, 1984.

Federal Scientific Personnel

Since fiscal year 1976-77, person-years for scientific activities have been fairly stable, in the range of 35,000. There has been a decline in person-years for the social sciences from 34% in 1976-77 (a census year) to 28% in 1984-85. There has been an approximately 6% increase in person-years for activities in the natural sciences.

Research and development is the predominant activity of the scientists and engineers in the natural sciences, receiving about 66% of the total effort by professional personnel.

In the social sciences, research is a minor activity; in 1976-77, it accounted for 27% of the input of social scientists in scientific activities and in 1984-85 it will account for about 14%. A similar decline has taken place for other personnel categories involved in the social sciences.

For further information, order *Vol. 8, No. 9, Science Statistics Services Bulletin* (88-001, Canada, \$1.60; Other countries, \$1.90).

Employment/Earnings/Hours

The preliminary estimates of employment for the Canada industrial aggregate increased by 1.7% from April to May. All provinces and territories contributed to the increase and all industry divisions registered increases except public administration, which decreased.

Average weekly earnings, at the Canada industrial aggregate level, increased 0.6% from \$399.69 to \$401.97. Increases were registered in all industry divisions except forestry and public administration, which decreased. All provinces and territories increased except New Brunswick and Saskatchewan.

Detailed information will be published in the *May 1984 issue of Employment, Earnings and Hours* (72-002, \$5.55/\$55.50), or may be obtained by calling the *Labour Division* (613-990-9900).

... U.S.—Canada Trade, 1983

- An addition of \$1,334 million for timing of United States imports, up \$1,213 million from 1982. This increase in the timing adjustment is attributable to a change in the definition of the statistical month for United States imports.
- A reduction of Canadian imports by \$798 million for goods priced above transaction value, mainly due to crude rubber, plastics, non-electrical machinery and transportation equipment imports.
- An addition of \$330 million to U.S. imports of goods of third-country origin re-exported by Canada, which has been credited to the country of origin in United States import statistics.

For further information, contact F. Bordé (613-995-6115 or 613-990-9784), *Trade Measures and Analysis Section, External Trade Division, Statistics Canada, Ottawa K1A 0T6*.

Railway Operations

Canada's seven major railways reported a combined net income from operations of \$32.8 million in February 1984. Operating revenues of \$569.3 million were up 18.6% from the 1983 level.

Revenue freight tonne-kilometres in February rose 23.0% from a year earlier, freight train-kilometres showed an increase of 16.7% and freight car-kilometres rose 19.6%. Average revenue per tonne-kilometre of freight was 2.445 cents. Revenue passenger-kilometres were up 6.2% to 133.7 million.

For further information, order the *February 1984 issue of Railway Operating Statistics* (52-003, \$2.75/\$27.50), or contact the *Rail Unit* (613-990-8693), *Transportation and Communications Division, Statistics Canada, Ottawa K1A 0T6*.

Natural Gas Sales

May sales of natural gas by main distributors amounted to 3 313 215 thousand cubic metres, up 4.9% from a year earlier. Sales were broken down as follows, with percentage changes from 1983 in brackets: residential, 705 774 thousand cubic metres (+1.3%); commercial, 612 407 thousand cubic metres (+2.9%); industrial, 1 965 034 thousand cubic metres (+5.2%).

For the first five months of 1984, sales amounted to 23 865 101 thousand cubic metres, up 10.2% from a year earlier.

For further information, order the *May 1984 issue of Gas Utilities* (55-002, \$2.75/\$27.50), or contact Richard Godin (613-990-9823), *Energy Section, Manufacturing and Primary Industries Division, Statistics Canada, Ottawa K1A 0T6*.

Industrial Production

Industrial production (seasonally adjusted data and measured in constant 1971 prices) decreased 0.4% in May 1984 to \$33.6 billion from \$33.7 billion in April.

For further information, order the *May 1984 issue of Gross Domestic Product* (61-005, \$3.85/\$38.50), or contact R. Kennedy (613-990-9145), *Industry Product Division, Statistics Canada, Ottawa K1A 0T6*.

Farm Incomes Revised

Farm net income as well as monthly and annual farm cash receipts for the period 1971 to 1983 are now available on CANSIM. Users should note that the estimates have changed slightly from those released at June 1, 1984. The parameters used in calculating Ontario cattle sales for 1982 and 1983 have been revised, resulting in a change in cash receipts. Several minor technical problems and errors in the June 1 release have also been corrected.

For further information, contact Lambert Gauthier or Steven Danford (613-990-8706), *Agriculture Statistics Division, Statistics Canada, Ottawa K1A 0T6*.

Private/Public Investment

Mid-Year Review 1984

Following a mid-year review of 1984 capital expenditures in Canada, the total is now expected to be \$75,327 million, of which \$266 million or 0.4% is above the March 2, 1984 estimate of \$75,061 million. The mid-year 1984 estimated increase of 1.2% over 1983 is close to expectations at the beginning of the year. The 1983 total — \$74,425 million — was down 3% from 1982's \$76,761 million. All the amounts referred to are in current dollars without an adjustment for price changes during the years covered.

Two major components contributing to the mid-year estimates work against each other, reducing the size of the overall estimated increase. Business capital spending is showing an increase of \$1,127 million or 2.3% in the new estimate of \$50,696 million (compared with the totals of \$49,757 million in 1983 and \$55,354 million in 1982). This increase in business spending is, however, offset by a decrease of \$1,161 million in the estimate for housing. The social capital of institutions and governments shows a further gain of \$301 million or 2.4% at the new level of \$12,629 million, compared with the earlier 1984 estimate of \$12,328 million (\$11,796 million and \$11,258 million for 1983 and 1982 respectively).

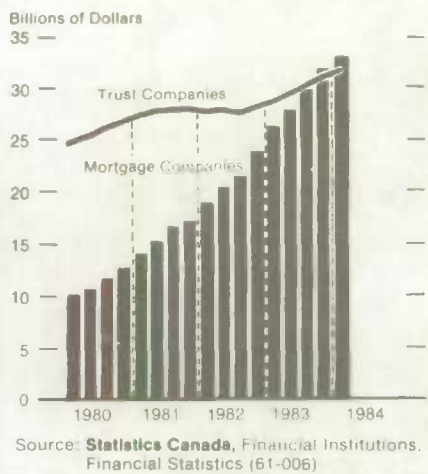
In the expenditures on all new construction, a downward revision of 1.9% results in a new 1984 estimate of \$45,424 million that reflects a drop of \$1,161 million (8.8%) for housing and a gain of \$267 million (0.8%) for non-residential construction from the earlier estimates for 1984. Housing is now based on an expected 143,200 starts compared with the 166,000 starts projected earlier for 1984, resulting in the new level of \$12,003 million compared with \$13,164 million projected last January for the current year. In 1983, residential construction was reported at \$12,872 million (based on 162,645 starts) and \$10,149 million in 1982 (based on 125,860 starts). The rest of the construction program for non-residential buildings and for engineering structures is now estimated at \$33,421 million for 1984 compared with the \$33,154 million expected for 1984 at the beginning of the year. The totals for 1983 and 1982 were \$33,232 million and \$36,369 million.

In contrast with the limited gain in construction, the additional intended expenditures for machinery and equipment show a marked increase for 1984, particularly for the business sector. The new estimate at \$29,903 million is 4.0% above the level expected earlier for the current year (\$28,743 million). The estimated increase over the \$28,321 million in 1983 is now 5.6% (after a decline of 6.4% last year over the \$30,244 million in 1982).

The strengths in the business sector are derived mostly from manufacturing and also from the trade-finance-commercial group of industries. Increases in estimates for manufacturing can be attributed mainly to additional machinery purchases for industries such as paper products, food and

Trust and Mortgage Companies

Quarterly Statements of Mortgages Outstanding



beverages, wood products and transportation equipment. For the primary metals group, most of the estimated increase in machinery resulted from later information, re-allocating expenditures to machinery from the construction category. Concerning total spending for all manufacturing, the estimated increase of \$607 million (+7.1%) produces a new 1984 expectation of \$9,192 million, compared with the earlier estimate of \$8,584 million. The new estimate represents an increase of 4.4% over the \$8,802 million in 1983, compared with the drop of 2.5% that had been expected. (The total for 1982 was \$11,493 million.)

The trade-finance-commercial group shows increased spending during 1984 in all three areas. Additional work by the real estate group is reflected on the construction side and leasing activity in the commercial services group contributes most to the increase for machinery. A number of the other industry groups in the business sector show decreases. Transportation and communications showing small gains are more than offset by a downward revision of \$188 million (-2.6%) for electric power. Overall, the utilities are down by 0.8%, from the earlier estimate for 1984, deepening a decrease from 1983 to 5.6% (-\$890 million). The primary industries group is also expected to be lower than indicated earlier for 1984. A decrease of \$256 million for agriculture and fishing in the current estimate for 1984 reduces that expected total to the 1983 level. The decrease is not counteracted by an additional amount of \$151 million (1.5%) for non-metal mining and petroleum and gas; all mining (including petroleum and gas wells) at \$10,172 million, is now estimated at 5.9% (\$565 million) above 1983's \$9,607 million level.

Other information can be obtained by contacting Duncan Lusick or Justin Lacroix (613-990-9815), Construction Division, Statistics Canada, Ottawa K1A 0T6. Regional offices of Statistics Canada may also be contacted.

Population Estimates

On April 1, 1984, Canada's population reached an estimated 25,082,000, an increase of 238,600 over April 1, 1983 (a rate of growth equivalent to 9.6 per 1,000). For the one-year period ending on March 31, 1983, the nation's population grew by 264,000 for a rate of 10.7 per 1,000. The further slowdown in the rate of growth reflects the falling off of immigration numbers to 85,200 from 113,400.

At the provincial level, the most important change is the drop in the rate of growth for Alberta. This deceleration, apparent for about two years, translates into zero growth between April 1, 1983 and April 1, 1984, with the province's population remaining at 2,349,100. At the beginning of the 1980s, Alberta's population grew at a rate of 46 per 1,000, approximately five times higher than the rest of Canada.

For the 12-month period ending March 31, 1983, Alberta's growth was still the highest in Canada (18.5 per 1,000) but well below its 1980 level. The main reason for the present moderation is the reversal in the flow of interprovincial migration: Alberta gained 2,700 persons in 1982-83 but lost 37,600 in 1983-1984.

To obtain information on population estimates, order catalogue no. 91-001, vol. 12, no. 2, or contact Lise Ofori-Attah (613-995-2212), Demography Division.

Energy Statistics

Preliminary figures for May 1984 show that Canadian production of crude oil (7 362 million litres) rose 18.1% over May 1983 to meet increasing demand in the export and domestic sectors. Canada's oil exports of 2 119 million litres represents an increase of 57.9% over last year. Imports were also higher, reaching 982 million litres. The production by Canadian refineries of refined petroleum products (gasolines, fuel oils, etc.) rose 16.1% to 6 956 million litres while the sales of these products improved by only 1.2%.

In May 1984, natural gas production increased 12.2% to 6 722 million cubic metres. Exports were 18.9% higher than May of 1983. These exports reached 1 614 million cubic metres and sales in Canada totalled 3 313 million cubic metres, an increase of 4.9%.

Coal mines in Canada produced 4 865 kilotonnes of bituminous coal, sub-bituminous coal and lignite, an increase of 30.1% over May 1983. Exports rose 23.5%. Electricity production rose 11.2%.

For further information, contact Richard Godin (613-990-9823), Energy Section, Manufacturing and Primary Industries Division, Statistics Canada, Ottawa K1A 0T6.

Oilseed Crashings

Domestic crashings of rapeseed-canola during June amounted to 61 700 tonnes with 24 529 tonnes of oil produced and 36 667 tonnes of meal produced.

For further information, order the June 1984 issue of *Cereals and Oilseeds Review* (22-007, \$2.75/\$27.50).



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	Cata- logue No.	In Canada. Price per issue/year	Elsewhere: Price per issue/year
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Cereals and Oilseeds Review, May 1984	22-007	\$2.75/\$27.50	\$3.30/\$33
Fruit and Vegetable Production, July 1984	22-003	\$2.75/\$27.50	\$3.30/\$33
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Road Transport — Vol. 13, No. 3, Federal, Provincial and Territorial Roads and Highways — Length and Expenditure, 1981-82	53-006	\$1.60/\$16	\$1.90/\$19

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