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Weekly Bulletin

August 10, 1984

## Canada's Merchandise Trade

On a seasonally adjusted balance-of-payments basis, preliminary results show that Canada's total exports slipped 0.6% or \$60 million to \$9.5 billion in June 1984, following a \$650 million increase in May and a \$400 million decline in April. Imports fell 6.0% or \$475 million to \$7.4 billion after increasing \$680 million in May and decreasing \$650 million in April. As a result, the merchandise trade surplus expanded by \$415 million to a record high of \$2.1 billion in June 1984, following a \$30 million contraction in May and a \$250 million increase in April. (The previous record level for the merchandise trade surplus was \$2.0 billion, posted in September 1982.)

For the first six months of 1984, total exports rose by 26.4% or \$11.4 billion to \$54.8 billion, and total imports climbed by 32.8% or \$11.1 billion to \$44.9 billion. This resulted in a merchandise trade surplus for January-June 1984 of \$9.9 billion, up \$355 million from the corresponding period last year.

In the second quarter of 1984, total exports rose 4.5% or \$1.2 billion to \$28.0 billion, following increases of \$2.0 billion in the first quarter of 1984 and \$2.1 billion in the fourth quarter of 1983. Imports edged up

(continued on page 2)

## Department Store Sales

Department stores in Canada had sales totalling \$941.3 million in June 1984, up 2.3% from a year earlier. Cumulative sales for the first six months of 1984 reached \$4,827.2 million, an increase of 6.0% over the January-June 1983 period.

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

- Ontario, \$348.6 million (+3.2%)
- Quebec, \$178.3 million (+7.8%)
- British Columbia, \$144.5 million (-4.8%)
- Alberta, \$124.8 million (-2.1%)
- Atlantic provinces, \$66.5 million (+2.9%)
- Manitoba, \$49.3 million (+6.5%)
- Saskatchewan, \$29.5 million (+9.7%).

Data users should note that the British Columbia figures include as well those for the Yukon and Northwest Territories. See the June 1984 issue of *Department Store Sales by Regions* (63-004, \$1.60/\$16), or for further information, contact the Merchandising and Services Division (613-990-9665), Statistics Canada, Ottawa K1A 0T6.

## 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' Untilled 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)	June	95.3	95.5	0.8
Raw Materials Price Index (1977=100)	June	217.0	217.9	-6.7
Excl. coal, crude oil, nat. gas	June	162.4	163.8	2.9
Industry Selling Price Index (1971=100)	June	310.9	310.5	6.6

### CONSTRUCTION

Building Permits (\$ million)	May	1,652.7	5,555.8	-6.3
Housing Starts — Urban Centres (units)	June*	11,977	54,076	-27.8

### ENERGY

Coal Production (thousand tonnes)	May	4,877	23,036	28.9
Electricity Generation (terawatt hours)	May	33.3	183.1	10.1
Natural Gas Production (million cubic metres)	May	6,722	39,250	7.9
Petroleum Refining (million cubic metres)	May	7.0	35.7	10.0

### FOREIGN TRADE

Exports — Balance of Payments Basis (\$ million)	June*	9,515	54,817	26.4
Imports — Balance of Payments Basis (\$ million)	June*	7,445	44,923	32.8

### PRODUCTION

Railway Carloadings (million tonnes)	June*	20.6	117.5	19.0
Steel (ingots — thousand tonnes)	June	1,243	7,581	27.0

### SALES

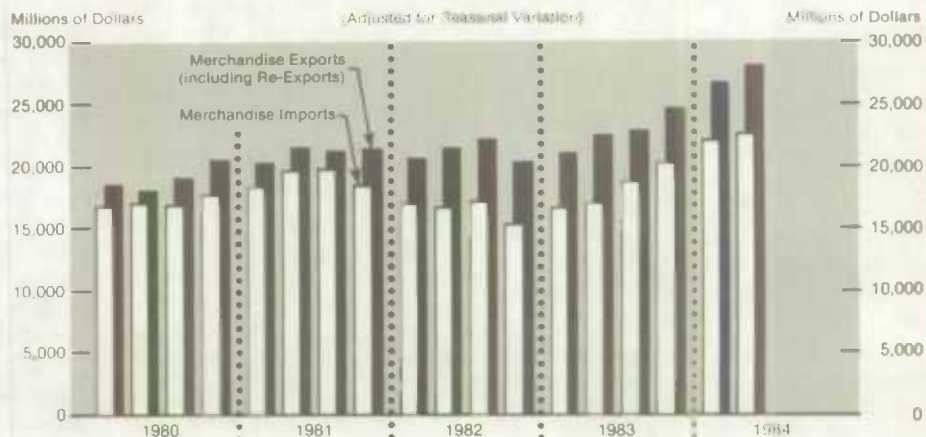
Department Store Sales (\$ million)	June*	941.3	4,827.2	6.0
Manufacturers' Shipments (\$ million)	May	19,849.0	92,239.1	17.8
New Motor Vehicle Sales (\$ million)	May	1,683.2	6,727.1	39.2
Retail Sales (\$ million)	May	10,103.5	43,806.1	11.1

Statistics are in current dollars and are not seasonally adjusted.

\* - new this week.

## Canadian Merchandise Exports and Imports\*

Quarter-by-Quarter Movements



\* Balance of Payments Basis

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

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### ... Canada's Merchandise Trade

1.3% or \$295 million to \$22.6 billion after climbing \$1.8 billion in the first quarter of 1984 and \$1.7 billion in the fourth quarter of 1983. As a result, the merchandise trade surplus increased by \$920 million to \$5.4 billion in the second quarter of this year, following gains of \$205 million in the first quarter and \$400 million in the fourth quarter of 1983.

For further information, order the June 1984 issue of *Summary of External Trade* (65-001, \$3.30/\$33), or contact G. Blaney (613-990-9647), Trade Information Unit, or François Bordé (613-990-9784), Trade Measures and Analysis Section, External Trade Division, Statistics Canada, Ottawa K1A 0T6.

### Private Education

Unlike the trend for public school education, enrolment in private schools continues to increase: in 1983-84 private school enrolment reached 229,000 students, an increase of 1.5% over the preceding year and 60% since 1970-71.

For further information, order the Education Statistics Service Bulletin (81-002, \$1.60/\$16), Vol. 6, No. 6, *Continuing Growth in Private Education*.

### Urban Transit

Canadian urban transit systems (65) collected 115,402,976 initial passenger fares in June 1984. The total distance run was 58 140 377 kilometres and their operating revenues amounted to \$66.2 million.

For further information, order the June 1984 issue of *Urban Transit* (53-003, \$1.60/\$16), or contact the head (613-990-8700), Surface Transport Unit, Transportation and Communications Division, Statistics Canada, Ottawa K1A 0T6.

### Oil Pipeline Transport

Net receipts of crude oil, condensates, pentanes plus, liquefied petroleum gases and petroleum products through Canadian oil pipelines during May 1984 increased 15.5% to 11 738 409 cubic metres from 10 165 123 cubic metres in May 1983.

For further information, order the May 1984 issue of *Oil Pipeline Transport* (55-001, \$2.75/\$27.50), or contact R. Godin (613-990-9823), Manufacturing and Primary Industries Division, Statistics Canada, Ottawa K1A 0T6.

### Railway Carloadings

Revenue freight loaded by railways in Canada totalled 20.6 million tonnes in June 1984, an increase of 10.9% from the previous year. The carriers received an additional 1.2 million tonnes from the United States, an increase of 3.8% from June 1983.

Total loadings in Canada for the year-to-date showed an increase of 19.0% from the 1983 period and receipts from United States connections increased 9.4%.

For further information, order the June 1984 issue of *Railway Carloadings* (52-001, \$1.60/\$16). For seasonally adjusted revenue freight loadings, contact the Rail Unit (613-990-8693), Transportation and Communications Division, Statistics Canada, Ottawa K1A 0T6.

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### Weekly Bulletin

Published by the Federal and Media Relations Division, Statistics Canada.

Senior Editor Greg Thomson  
(613-993-7444).

Editor Brian Huggins (613-993-7644), 3C, R.H. Coats Building, Tunney's Pasture, Ottawa K1A 0T6.

Catalogue 11-002E. Price: Canada, \$27.75 a year; other countries, \$33.30 a year. To subscribe: send money order or cheque payable to the Receiver General for Canada to Publication Sales and Services, Statistics Canada, Ottawa K1A 0T6.

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### Residential Building Index

The Residential Building Construction Input Price Index for Canada (1971=100) declined to 291.8 in June, down 0.5% from its May level of 293.3. The materials index fell 0.9% during the month due primarily to price decreases for lumber and plywood that more than offset increases for gypsum wallboard, stucco and pipe. The labour component remained unchanged in June from May's level of 328.4.

Comparing June 1984 with June 1983, the Index declined 0.8%, with a decrease of 2.3% for the materials component and an increase of 1.5% for the labour index.

### Non-residential Building

The Non-residential Building Construction Input Price Index for Canada (1971=100) reached a level of 308.4 in June, up 0.6% from May's level of 306.5. The materials index rose 1.3% during the month due to price increases for conduit, gypsum wallboard and concrete ready-mix that more than offset several decreases, notably for reinforcing concrete bars and plywood. The labour component remained unchanged in June from May's level of 329.0.

Comparing June 1984 with June 1983, the Index rose 1.4%, with increases of 1.8% for the materials index and 1.1% for the labour component.

### Telephone Statistics

Canada's 13 major telephone systems reported revenues of \$747.4 million in June 1984, up 7.9% from a year earlier. Operating expenses increased 5.3% over the 12-month period to \$519.5 million. Net operating revenue at \$227.9 million showed a gain of 14.5% over June 1983.

For further information, order the June 1984 issue of *Telephone Statistics* (56-002, \$1.60/\$16), or contact J.R. Slattery (613-990-8693), Transportation and Communications Division, Statistics Canada, Ottawa K1A 0T6.

### Help-wanted Index

The Canada seasonally adjusted Help-wanted Index (1981=100) rose slightly to 66 in July 1984 from 64 in June.

Regionally, the indexes advanced in the Atlantic provinces (to 259 from 179) and the Prairie provinces (to 38 from 34) and declined in Quebec (to 70 from 72), Ontario (to 63 from 70) and British Columbia (to 27 from 30). Similarly to June 1984, the Canada and Atlantic provinces indexes were again affected by large government advertisements placed in a St. John's newspaper.

The short-term trend, an indicator of the direction of the demand for labour as measured by the Help-wanted Index, continued to increase in July.

Inquiries about the Index should be directed to Horst Stiebert (613-990-9900, Ext. 238), Labour Division, Statistics Canada, Ottawa K1A 0T6.

### International Travel

Preliminary statistics for June 1984 show that 3.8 million United States residents entered Canada, up 5.8% from a year earlier. Visitors from other countries increased 2.7% to 256,000. In total, non-resident entries numbered 4.1 million in June 1984, 5.6% above the same month last year. Canadian residents re-entering this country after visits to the U.S. numbered 3.1 million, down 6.1% from June 1983, and residents returning from other countries increased 22.9% to 144,000. During the month, total Canadian residents returning to this country numbered 3.2 million, down 5.1% from June 1983.

For the first six months of 1984, the international flows were as follows: 13.1 million U.S. residents entered Canada, up 0.4% from January-June 1983; visitors from other countries increased 5.7% to 714,000; Canadians returning from the U.S. decreased 0.8% to 17.5 million and resident re-entries from other countries numbered 1.0 million, up 17.9% from 1983.

For further information, order the June 1984 issue of *International Travel* — Advance Information (66-002, \$1.60/\$16), or contact Paul L. Paradis (613-990-8932), International Travel Section, Statistics Canada, Ottawa K1A 0T6.

### Electric Power Statistics

Net generation of electricity in Canada increased by 11.4% in May 1984 to 33 271 gigawatt hours from 29 861 GW.h a year earlier. Exports of electric power climbed 19.5% to 3 306 GW.h from 2 766 GW.h and imports declined by 57.0% to 233 GW.h from 542 GW.h.

For the first five months of 1984, net generation of electricity totalled 183 052 GW.h, up 10.1% from the January-May 1983 level of 166 334 GW.h.

For further information, order the May 1984 issue of *Electric Power Statistics* (57-001, \$2.75/\$27.50), or contact Dave Madsen (613-990-9823), Energy Section, Manufacturing and Primary Industries Division, Statistics Canada, Ottawa K1A 0T6.



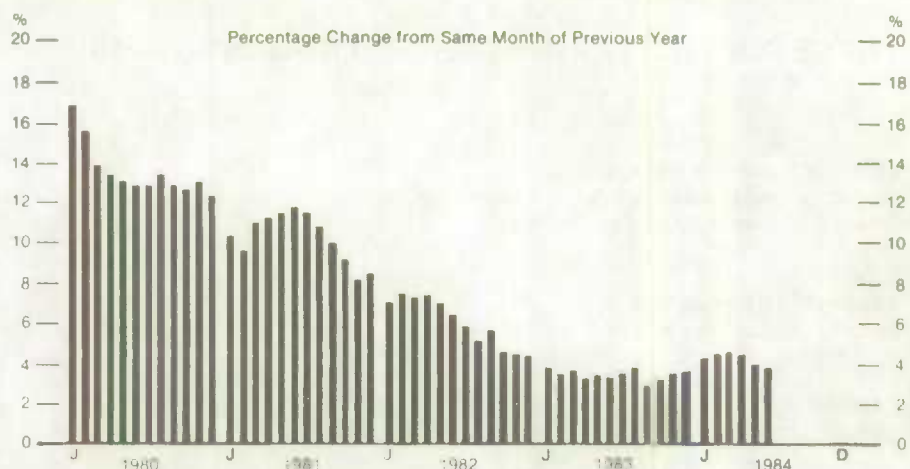
## Current Economic Analysis, Monthly Review

The economic indicators available in July signalled a continuation of modest growth in output over the short-term. Final demand appears to have declined slightly in the second quarter with inventory accumulation accounting for all the growth of output. There are signs that the weakening trend of consumer demand for durable goods has been reinforced by the increase of interest rates and a renewed reduction in investment in residential construction is under way. Data for the external sector show a marked slowdown in the volume of exports to the United States following a weakening of shipments to Europe in the first quarter. The build-up of inventories has been reflected in higher output and employment in manufacturing industries in the second quarter.

This increase in manufacturing activity reflects stock-piling in anticipation of possible production difficulties associated with the heavy collective bargaining calendar scheduled for the rest of the year as well as low stock-to-sales ratios. The increased number of person-days lost due to strikes and lockouts throughout the first quarter is indicative of the emerging disharmony in the industrial relations climate. To date, the increase has been confined to one province, although conflicts could intensify further, with over two million workers renewing their contracts this year in the midst of still weak economic conditions. The course of negotiations in several bargaining units reveals that employers are attempting to accentuate the drop in unit labour costs which has occurred since the beginning of 1983. There is some evidence that wage-earners are prepared to moderate their salary demands in return, at least, for more job security. There was a further slowdown of nominal wage settlements in the first quarter, a continuation of the trend that began in the first quarter of 1982, as inflation has subsided recently while labour market conditions remained depressed.

Restrained labour income, rising interest rates and a growing incidence of part-time employment have all contributed to the weak growth of household demand. According to the Labour Force Survey there has been a steady increase of involuntary part-time employment, up from 395,000 employees in December 1982 to 554,000 in June 1984. This increase of 159,000 more than accounts for the improvement in unemployment in the recovery and expansion. The data on fulltime employment by industry underline this development as there has been only a marginal improvement in most industries in the recovery. Most of the gain has occurred in manufacturing; in the construction, trade, and transportation, communication and utility industries, employment recently has oscillated around the trough levels attained during the last recession. Employment in

## Industry Selling Price Index: Manufacturing (1971=100)



Source: Statistics Canada, Industry Price Indexes (62-011)

## Provincial Governments

Canada's provincial and territorial governments are forecast to post a combined \$4.0 billion deficit for the fiscal year ending March 31, 1985. Gross general revenues are expected to total \$91.7 billion while gross general expenditures are estimated to reach \$95.8 billion.

For further information on *Provincial Government Finance, Revenue and Expenditure Estimates, 1984-85*, contact G. Huneault (613-990-8559), Public Institutions Division (formerly Public Finance Division), Statistics Canada, Ottawa K1A 0T6.

## Alcoholic Beverage Sales

Sales of alcoholic beverages in Canada reached \$6,880 million in the year ended March 31, 1983, up \$666 million or 10.7% from the previous year. Sales volume decreased to 2 477 million litres from 2 508 million.

Imports of alcoholic beverages decreased to \$189 million from \$192 million and the value of exports decreased to \$369 million from \$373 million.

Provincial government revenues from the sale and control of alcoholic beverages rose 12.3% to \$2,172 million in the latest year.

Further information will be contained in the publication *Control and Sale of Alcoholic Beverages in Canada, 1982* (63-202, \$5.00). Advance details can be obtained from R.C. Sauriol (613-990-8556), Public Finance Division, Statistics Canada, Ottawa K1A 0T6.

the central and eastern regions of the country firmed, driven by the manufacturing and primary sectors, but the weakness of services was evident in the west where total employment declined slightly or stabilized in the second quarter.

For the detailed analysis, plus a news summary of major domestic and international developments and extensive analytical charts and tables, order *Current Economic Analysis* (13-004E, Canada: \$2.75/\$27.50; Other Countries: \$3.30/\$33). For further information contact D. Rhoades (613-990-9161).

## Education Price Index

The Education Price Index (EPI) at the elementary and secondary levels rose 5.4% in 1983 (compared with 13.3% in 1982), reaching a level of 119.5 (1981=100). This was the lowest change observed since 1972.

In 1983, a significant deceleration occurred in the growth of salaries and wages — the main EPI component — which increased by 13.4% in 1982 but only by 5.3% in 1983. As a consequence of the adoption of restrictive budgetary measures, the provincial EPI growth rates decreased across the country.

For further information, order the July 1984 service bulletin *Education Statistics* (81-002, \$1.60/\$16), Vol. 6, No. 5, or contact Sylvain Venne (613-990-8356), Education, Culture and Tourism Division, Statistics Canada, Ottawa K1A 0T6.

## Wholesale Trade

Wholesale merchants' sales in May 1984 continued to increase strongly, advancing 18.6% over the same period last year. (Revised sales for April 1984 were up 15.6% from the April 1983 level.)

All trade groups except farm machinery, equipment and supplies (-12.9%) recorded sales increases from a year earlier with the most notable gains reported by wholesalers of motor vehicles and accessories (+39.2%), metals, hardware, plumbing and heating equipment (+28.8%), and other machinery, equipment and supplies (+24.7%). All regions posted sales increases from a year earlier.

Cumulative sales by wholesale merchants for the first five months of 1984 were up 16.6% over the January-May 1983 period.

## Inventories

Wholesale inventories in May 1984 increased by 6.7% from the corresponding period in 1983. The ratio of inventories to sales at the end of May 1984 was 1.49:1, down from 1.66:1 a year earlier.

For further information, order the May 1984 issue of *Wholesale Trade* (63-008, \$1.60/\$16), or contact the Wholesale Trade Section (613-990-9679), Merchandising and Services Division, Statistics Canada, Ottawa K1A 0T6.



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## THESE PUBLICATIONS RELEASED AUGUST 3 — 10

	Catalogue No.	In Canada: Price per issue/year	Elsewhere: Price per issue/year
<b>AGRICULTURE STATISTICS</b>			
Production and Stocks of Eggs and Poultry, May 1984	23-003	\$2.75/\$27.50	\$3.30/\$33
Stocks of Frozen Meat Products, July 1984	32-012	\$2.75/\$27.50	\$3.30/\$33
<b>BALANCE OF PAYMENTS</b>			
Security Transactions with Non-residents, May 1984	67-002	\$2.75/\$27.50	\$3.30/\$33
<b>CANSIM</b>			
Canadian Statistical Review, July 1984	11-003E	\$3.80/\$38.50	\$4.60/\$46
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<b>Service Bulletin</b>			
Education Statistics, Vol. 6, No. 6, Continuing Growth in Private Education, 1971-72 to 1983-84	81-002	\$1.60/\$16	\$1.90/\$19
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Inventories, Shipments and Orders in Manufacturing Industries, May 1984	31-001	\$3.85/\$38.50	\$4.60/\$46
Mineral Wool Including Fibrous Glass Insulation, June 1984	44-004	\$1.60/\$16	\$1.90/\$19
Production of Selected Biscuits, Quarter Ending June 1984	32-026	\$2.75/\$11	\$3.30/\$13.20
Production, Shipments and Stocks on Hand of Sawmills in British Columbia, May 1984	35-003	\$1.60/\$16	\$1.90/\$19
The Sugar Situation, June 1984	32-013	\$1.60/\$16	\$1.90/\$19
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Road Transport, Vol. 13, 1982: No. 5, Trucking Activity Survey (Manufacturing); No. 6, Trucking Activity Survey (Construction)	53-006	\$1.60/\$16	\$1.90/\$19
Aviation Statistics Centre, Vol. 16, No. 7, Canadian Air Transport Industry, Summary Statistics	51-004	\$1.60/\$16	\$1.90/\$19

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