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Weekly Bulletin

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## Business Conditions Survey, Canadian Manufacturing Industries

Canadian manufacturers reporting to the July Business Conditions Survey generally expect production to be lower in the third quarter of 1984 than in the previous quarter. The results show that respondents representing 33% of manufacturing shipments expect lower production from July to September and only those representing 22% forecast higher production. Those representing 44% of manufacturing output anticipate production to remain at about the same level.

When results are classified by the type of market served, manufacturers of durable consumer goods and other, intermediate, goods, plus those in the export-based industries, forecast that on balance production will be lower. However, manufacturers in the other three categories — non-durable consumer goods, machinery and equipment and construction materials and supplies — forecast higher production in the third quarter.

Manufacturers in New Brunswick, Ontario, Manitoba and Alberta on balance expect lower production levels in the third quarter. Little change is anticipated in Quebec but increases in output are forecast in Nova Scotia, Saskatchewan and British Columbia.

The results of the July survey also indicate that there is little overall change in the receipt of new orders. Manufacturers representing 53% of manufacturing output report that the receipt of new orders remains at about the same number whereas those representing 23% report a rise in the number and those representing 24% report a decline. The largest quarter-to-quarter changes in new orders received are reported by the other, intermediate, goods-producing industries and export-based industries where there was a large decline in the proportion of manufacturers reporting increased new orders and a substantial increase in the proportion reporting fewer new orders.

In July, the backlog of unfilled orders at the Canada level was reported to be larger than normal by respondents representing 21% of manufacturing output, smaller than normal for 24% and about normal for 56%. Manufacturers in all economic use groups,

(continued on page 2)

## LATEST MONTHLY STATISTICS

### EMPLOYMENT, INCOME

			Previous Month	% Change From Year Ago
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)	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)	Apr.	9,051	30,591	-15.0

### ENERGY

Coal Production (thousand tonnes)	May*	4,877	23,036	28.9
Electricity Generation (terawatt hours)	June*	33.3	183.1	10.1
Natural Gas Production (million cubic metres)	May*	6.7	39.3	7.9
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

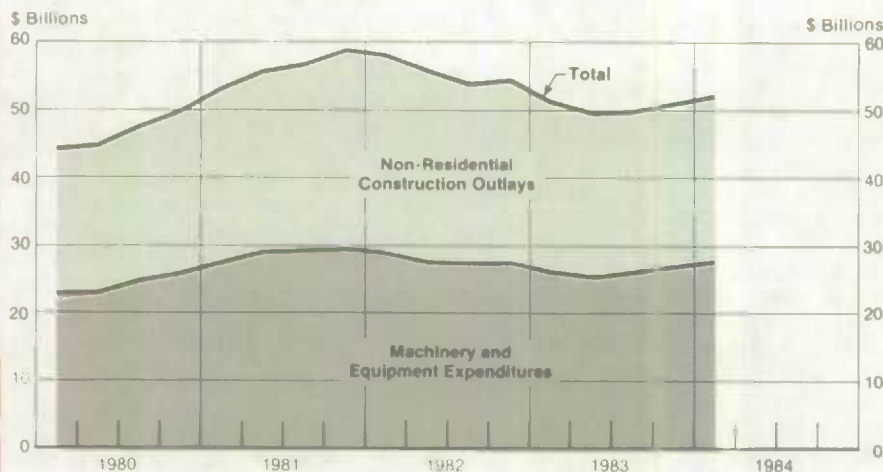
Department Store Sales (\$ million)	May	927.8	3,885.9	7.0
Manufacturers' Shipments (\$ million)	May	19,849.0	92,239.1	17.8
New Motor Vehicle Sales (\$ million)	May	1,683.2	6,727.1	39.2
Retail Sales (\$ million)	May	10,103.5	43,806.1	11.1

Statistics are in current dollars and are not seasonally adjusted.

\* - new this week.

## Business Investment in Plant and Equipment

Data Seasonally Adjusted at Annual Rates



Source: Statistics Canada, National Income and Expenditure Accounts (13-001)

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## Weekly Bulletin

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### ... Business Conditions

except for non-durable consumer goods and in export-based industries, indicated that on balance the backlog of unfilled orders was smaller than normal. Ontario was the only province where manufacturers on balance indicated a bigger-than-normal backlog of unfilled orders.

Manufacturers continue to be very cautious about inventory build-up. In the latest survey, respondents representing 95% of manufacturing output perceived levels of stocks of finished goods to be either too high or about right. Only those representing 5% reported that levels of inventories were too low.

Regarding production impediments, a shortage of working capital continues as a major cause of production difficulties. However, respondents representing 85% of manufacturing output reported experiencing no difficulties.

*Historical data from the Business Conditions Survey are available from matrices 2840, 2841 and 2842 of the CANSIM data bank (CANSIM Division, 613-990-8200). For further information, contact T. Newton (613-990-9832).*

### New Housing Price Index

The New Housing Price Index (1981=100) decreased -0.2% in June 1984 to a level of 95.3 from 95.5 in May. This Index of housing contractors' selling prices now stands 0.8% higher than the year earlier level of 94.5. In June, the estimated house only index decreased -0.4% to 97.6 and the estimated land only index decreased -0.1% to 91.1.

Between May and June 1984, the largest decrease was recorded for Calgary (-1.6%). Decreases were also recorded for Edmonton (-1.0%), Victoria (-0.5%) and Ottawa (-0.4%). Increases were recorded for St. John's (1.1%), Quebec City (0.4%) and Windsor (0.4%).

*For further information, order Construction Price Statistics (62-007, \$3.30/\$33), or contact Prices Division (613-990-9601).*

### Gross Domestic Product

Gross domestic production (seasonally adjusted data and in constant 1971 prices) advanced 0.4% in May 1984 to \$123.2 billion from \$122.7 billion in April. Industrial production posted a 0.4% decline during May. Among the service-producing industries, gains were recorded by industries providing transportation, finance and community, business and personal services. In the goods-producing industries, output increases in forestry, public utilities and construction were partially offset by declines in mining and manufacturing.

Transportation industries recording production increases included air, water, railway and pipeline transport. Output of telephone systems also increased.

The output gain in the finance, insurance and real estate industry was primarily due to increased activity among insurance and real estate agencies. In the community, business and personal services sector, the gain was due largely to an increase in the accommodation and food service industry.

Following decline in March and April due to labour disputes, the forestry industry recovered some ground in May due to increased sawlog and pulpwood production.

The gain in public utilities was due to increased electric power generation. In construction, both residential and non-residential building activity recorded increases.

Mining output declined, with production of both metal mines and mineral fuels down substantially. Manufacturers' output was off slightly during the month with declines reported by producers of wood, machinery, transportation, electrical and non-metallic mineral products. Producers of paper and allied products and chemical products reported growth in the month.

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

### Unemployment Insurance

Unemployment insurance benefits paid out during the month of May 1984 totalled almost \$926 million, up 4% from April but down 1% from the same month a year earlier. Between January and May, \$4,773 million was paid to claimants, a 6% decrease compared with the same period in 1983.

The number of beneficiaries stood at 1,174,000 in May, a decrease of 10% from April and 8% from May 1983.

During May 249,000 claims have been received. This number increased by 10% and 9% over April 1984 and May 1983 respectively. Considering all claims received during the five-month period from January to May, the number decreased to 1,366,000 from 1,382,000 in 1983.

*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.*

### Farm Input Price Index

The Farm Input Price Index (1981=100) for Canada stood at 108.1 in the second quarter of 1984, up 0.9% from the revised first quarter level of 107.1. The quarterly movement differed between the eastern and western regions of Canada. Between the second quarters of 1983 and 1984 the index rose 3.4%.

The increase of 0.9% in the latest quarter was attributable largely to increases in interest (3.6%), animal production (0.8%) and crop production (1.8%). Except for machinery and motor vehicles, which fell marginally (-0.2%) because of a decline in petroleum prices, the other component groups all rose slightly.

The increase in the animal production index was mainly attributable to increases in prices for weaning pigs (9.6%) and feeds which rose 1.9% as a consequence of increases for eastern grain feed and prepared feeds. These increases were partially offset by a decline of 1.9% in the feeder cattle index.

In crop production there were a number of moderate price declines principally for grain seed, pesticide and twine. However, the 4.2% increase for fertilizer accounted for the overall increase in the crop production index in the quarter.

In eastern Canada, the index rose 2.1% in the second quarter, due mainly to the increases for animal production, interest and crop production. In western Canada, the index was unchanged in the quarter.

*For further information, order the second quarter 1984 issue of Farm Input Price Indexes (62-004, \$4.40/\$17.60).*

### Farm Income Outlook

Statistics Canada, in collaboration with Agriculture Canada, and in consultation with provincial analysts and agribusiness officials, is now releasing a revised Outlook of Realized Net Farm Income for 1984. This information updates the projections released at the Canadian Agricultural Outlook Conference in December 1983. The next update will be released in December 1984.

#### Highlights:

- Realized net farm income in 1984 is expected to decrease by 3.0% to \$3.43 billion
- Farm cash receipts in 1984 are expected to increase to \$19.62 billion
- Farm operating expenses and depreciation charges in 1984 are expected to rise by 6.5% to \$16.44 billion.

*For additional details, contact Steven Danford or Lambert Gauthier (613-990-8706), Agriculture Statistics Division, Statistics Canada, Ottawa K1A 0T6, or Fu-Lai Tung (613-995-9554), Production Development Policy Division, Agriculture Canada, Ottawa K1A 0C5.*



## Crime Statistics, 1983

In 1983, Criminal Code offences reported by police forces through the Uniform Crime Reporting (UCR) Program decreased 2.7% to 2,143,256 from 2,203,668 in 1982. Canada's crime rate (number of Criminal Code offences per 100,000 population) decreased 3.7% to 8,611 in 1983 from 8,946 in 1982.

Violent offences, totalling 170,624 or 8% of total Criminal Code offences, increased by 1.2% in 1983. The violent crime rate per 100,000 population, however, remained virtually unchanged between 1982 and 1983 at 685 and 686 respectively. Total robbery offences decreased rather sharply (11.2%) during the 1982-1983 period. Nearly one in three (31%) of robberies reported by the police in Canada during 1983 involved the use of a firearm, down from the 33% recorded in 1982 and the 39% in 1977.

Property crime offences decreased 3.2% during the year from 1,466,923 in 1982 to 1,419,653 in 1983. Highlighting this decrease were break and enter (down 2.3%) and theft over and under \$200 (down 3.0%). These offences accounted for 84.6% of total property crime offences in 1983.

In 1983, 54,791 narcotic/drug offences were reported by police to the Uniform Crime Reporting (UCR) Program, down 15.2% from 1982 (64,636). Cannabis offences, which constituted the majority within this category (79.8%), declined by 13.5% between 1982 (53,658) and 1983 (43,747). Heroin and cocaine offences increased 28.5% and 19.5% respectively during the 1982-1983 period.

Total offences (including Criminal Code, Federal Statutes, Provincial Statutes and Municipal By-laws) decreased 3.4% in Canada between 1982 and 1983.

For further information, contact D. Venables (613-993-6521) or R. Allen (613-990-9023), Canadian Centre for Justice Statistics.

## Raw Materials Price Index

The Raw Materials Price Index (1977=100) decreased in June to a preliminary level of 217.0, down 0.4% from its revised level of 217.9 in May. Of the eight component indexes in the Raw Materials Price Index, three posted declines ranging from 0.2% to 2.1%, three registered increases of less than one percent and two remained unchanged. The main contributors to the decrease in the Raw Materials Price Index in June were the component indexes for animals and animal products, down 2.1% and non-ferrous metals, down 1.5%, which more than offset an increase of 0.8% in wood materials.

Over the twelve-month period ending June 1984, the Raw Materials Price Index rose 2.9%. Over the same period, the Raw Materials Price Index, excluding coal, crude oil and natural gas, rose 6.6% after declining 0.9% during June.

For further information, order the June 1984 issue of *Industry Price Indexes* (62-011, \$3.85/\$38.50), or contact the Information Unit (613-990-9615), Industrial Prices Section.

## Industry Selling Price Index

Preliminary estimates show that the Industry Selling Price Index (ISPI) for manufacturing (1971=100) stood at 310.9 in June 1984, up 0.1% from the revised level of 310.5 for May. With this small increase for the month, the year-over-year advance — from June 1983 to June 1984 — was 3.9%, the first time since December 1983 that the annual rate has been below 4%. Marginal as it is, the 0.1% monthly change actually masks some dramatic, though divergent, price movements. Increases in the paper and allied industries (0.6%), the petroleum and coal products industry (0.5%) and the food and beverage industry (0.3%) were largely offset by declines in the wood (-2.3%) and primary metals (-0.4%) industries.

The paper and allied industries component index climbed 0.6% in June to a level 11.6% higher than a year earlier. Most of the increase for the month was due to a 0.8% rise in the pulp and paper mills index and, more specifically, an average 2.7% jump in the prices of the various types of sulphate and soda wood pulp.

According to preliminary estimates, the petroleum and coal products industry index rose by 0.5% in June, primarily in response to higher gasoline prices. The estimated year-over-year increase was 1.3%.

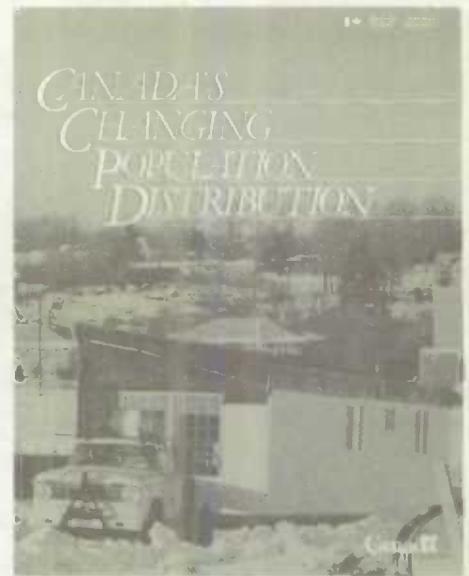
The food and beverage industry index edged up 0.3% in June and is now 6.0% higher than it was in June 1983. Most of the monthly advance stemmed from increases of 0.8% in the slaughtering and meat processors index, reflecting a 2.5% rise in pork prices, and 1.7% in the miscellaneous food processors index, due primarily to a 15.6% surge in margarine prices. These increases were partly offset by a 3.1% drop in the fish products industry index, owing to more abundant domestic supplies of fresh-water fish at this time of the year.

The wood industry index fell 2.3% in June to a level 10.3% lower than in June 1983. Declines of 3.1% in the sawmills and planing mills index, largely due to 8.8% and 3.1% cuts in cedar and Douglas fir prices respectively, and 4.4% in the veneer and plywood mills index were responsible for much of the monthly drop.

The primary metals index dipped 0.4% in June but remained 4.4% above its June 1983 level. The main factor in the decrease was a 1.1% drop in the smelting and refining index. In particular, copper and precious metals prices fell 1.8% and 0.4% respectively.

In June 1984, the proportion of industry indexes that posted gains (60%) was higher than in May (55%). The proportion of indexes showing no change slipped to 26% from 30% in the preceding month and the proportion that registered declines (14%) remained virtually the same as in May (15%).

For further information, order the June 1984 issue of *Industry Price Indexes* (62-011, \$3.85/\$38.50), or contact the Information Unit (613-990-9615).



## Where We Live

*Canada's Changing Population Distribution*, a new publication from Statistics Canada, highlights major changes in the geographic distribution of Canada's population.

Canada's population grew 12.9% between 1971 and 1981, the lowest 10-year increase since the 1930s. From 1901, the proportion of Canadians living in the Atlantic Provinces has declined steadily and the proportion living in British Columbia has increased continuously.

In the five year period from 1976 to 1981, Alberta showed the strongest growth, accounting for 29.6% of the growth in Canada's population, and Ontario and Quebec accounted for 26.7% and 15.1% respectively.

During these five years, there was a continuation of a trend that first emerged in the early 1970s — the share of Canadians living in rural areas inched upwards. However, much of this rural growth occurred close to the large urban areas.

*Canada's Changing Population Distribution* (99-931, \$5.50 in Canada, \$6.60 elsewhere) shows that, although interprovincial differences in proportions of old people, young people and immigrants are shrinking, the provinces are steadily becoming more diverse with respect to the proportions of residents who speak "Only French".

For copies, please send a cheque or money order (payable to the Receiver General for Canada) to: Publications Sales and Services, Statistics Canada, Ottawa K1A 0T6.

## Gas Utilities

Preliminary data show sales of natural gas amounted to 4 008.7 million cubic metres in April 1984, an increase of 1.4% from 3 951.8 million cubic metres a year earlier.



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Index Numbers of Farm Prices of Agricultural Products, May 1984	62-003	\$1.60/\$16	\$1.90/\$19
The Dairy Review, May 1984	23-001	\$2.75/\$27.50	\$3.30/\$33
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