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Weekly Bulletin

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## External Trade

On a seasonally adjusted balance-of-payments basis, preliminary estimates indicate that the value of Canada's total exports fell 1.9% or \$185 million in November to a level of \$9.6 billion. The November decline follows drops of \$65 million (0.6%) in October and \$320 million (3.2%) in September from the record level of \$10.2 billion in August.

Following declines of \$350 million (4.4%) in October and \$915 million (10.4%) in September from the record level of \$8.8 billion in August, imports rose 2.7% or \$205 million to a level of \$7.7 billion in November. The net effect of these movements was a drop in the merchandise trade surplus to \$1.9 billion from the record level of \$2.3 billion set last month.

## Commodity Analysis

The \$185 million decline in total exports in November reflected widespread declines among commodity groupings. Crude materials registered the most notable decrease at \$105 million, largely accounted for by declines in crude petroleum, coal and copper ores. End products were virtually unchanged at the total level as a result of a substantial increase in exports of motor vehicle parts and trucks being offset by a drop in exports of motor vehicles. The

(continued page 2, col. 1)

## The Labour Force

Canada's seasonally adjusted unemployment rate for December 1984 fell by 0.5% from the level of the previous month, registering 10.8%. The decline was concentrated in Ontario and Quebec and was the result of two factors: a drop in the number of unemployed at a time when unemployment normally increases, and a slightly larger than usual decline in labour force participation. The seasonally adjusted participation rate declined by 0.2% to 64.9% in December, while the employment/population ratio increased by 0.2% to 57.9%.

Employment for the week ending December 15, 1984 was an estimated 11,141,000, an increase of 33,000 over November. Employment rose by 15,000 to 2,380,000 for persons aged 15 to 24. On a regional basis, employment rose by an estimated 17,000 in Quebec and by 23,000 in Ontario. The level in British

(continued page 2, col. 2)

## LATEST MONTHLY STATISTICS

### EMPLOYMENT, INCOME

			Previous Month	% Change From Year Ago
Average Weekly Earnings (\$)	Oct.	407.37	408.99	-0.4
Labour Income (\$ million)	Oct.*	20,007.4	20,027.0	5.8
Persons with Jobs (million)	Dec.*	10.97	11.05	2.4
Unemployed	Dec.*	1,316.00	1,355.00	-1.5

### INVENTORIES

Department Store (\$ million)	Oct.	3,924.2	3,325.5	5.1
Manufacturers' Owned (\$ million)	Oct.	32,947.7	32,732.9	8.8

### ORDERS

Manufacturers' New Orders (\$ million)	Oct.	20,277.7	18,868.3	11.7
Manufacturers' Unfilled Orders (\$ million)	Oct.	22,232.6	22,043.8	9.6

### PRICES

Consumer Price Index (1981=100)	Nov.	124.0	123.2	4.0
New House Price Index (1981=100)	Nov.	94.5	94.8	-0.6
Raw Materials Price Index (1977=100)	Nov.	221.4	212.6	5.0
Excl. coal, crude oil, nat. gas	Nov.	156.2	155.1	2.2
Industry Selling Price Index (1971=100)	Nov.	313.5	312.3	3.9

### CONSTRUCTION

Building Permits (\$ million)	Oct.	1,311.1	12,733.4	4.2
Housing Starts — Urban Centres (units)	Nov.*	8,647	102,082	-17.6

### ENERGY

Coal Production (thousand tonnes)	Oct.*	5,475	47,199	30.5
Electricity Generation (terawatt hours)	Oct.*	35.3	346.1	8.4
Natural Gas Production (million cubic metres)	Oct.*	7,184	70,876	7.8
Petroleum Refining (million cubic metres)	Oct.*	6.6	72.2	1.1

### FOREIGN TRADE

Exports — Balance of Payments Basis (\$ million)	Nov.*	10,212	104,027	26.0
Imports — Balance of Payments Basis (\$ million)	Nov.*	7,838	85,326	27.6

### PRODUCTION

Railway Carloadings (million tonnes)	Nov.	21.7	222.9	17.1
Steel (ingots — thousand tonnes)	Dec.*	1,105	14,571	14.5

### SALES

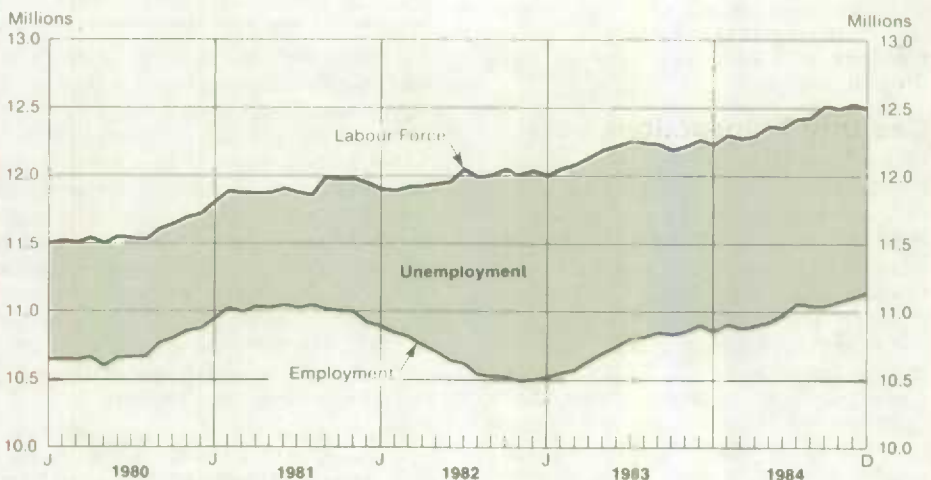
Department Store Sales (\$ million)	Oct.	957.6	8,411.9	4.4
Manufacturers' Shipments (\$ million)	Oct.	20,088.9	188,036.8	14.3
New Motor Vehicle Sales (\$ million)	Nov.*	1,266.9	14,607.2	29.3
Retail Sales (\$ million)	Oct.	9,846.0	92,553.7	8.8

Statistics are in current dollars and are not seasonally adjusted.

\* - new this week.

## The Labour Force

(Seasonally Adjusted)



Source: Statistics Canada, The Labour Force (71-001)

Canada



### ...External Trade

decline at the total level was moderated by strength in exports of precious metals and natural gas.

The \$205 million advance in total imports was largely attributable to end products, especially automotive products and aircraft. Crude petroleum and petroleum and coal products also registered significant increases. Smaller declines in imports of coal and sugar were mitigating factors.

### Trading Partner Analysis

Following declines of \$375 million in September and \$140 million in October, Canada's exports to the United States picked up by a modest \$105 million in November. The irregular movements since August largely reflect the effects of strike-related activity in the automotive industry. The strength in November, primarily attributable to advances in precious metals and natural gas, was somewhat mitigated by a decline in crude petroleum. The short-term trend in exports to the United States, however, has continued to lose momentum since December 1983, reflecting the pattern of slow growth in the United States economy. Following a 35% increase in October, exports to Japan declined 25% or \$145 million in November, which more than offset the increase in American demand. Coal was the primary commodity responsible for the decline. Marginal declines were registered in exports to all other principal trading areas.

For the third consecutive month, imports from the United States registered a decline. A record increase in August of \$825 million, followed by declines of \$620 million in September, \$290 million in October and a more modest drop of \$50 million in November were largely attributable to the irregular influence of industrial disputes in the automotive industry in both the United States and Canada. The short-term trend in imports from the United States has slowed steadily since December 1983 to a fractionally negative rate of -0.3% per month currently. Imports from Japan increased 13.4% or \$60 million to a level of \$510 million. Imports from all other principal trading areas registered increases.

*Order the November 1984 issue of Summary of External Trade (65-001, \$3.30/\$33), or contact G. Blaney (613-990-9647), or Judith Frederick (613-990-9784), External Trade Division.*

### Security Transactions

Foreign investment in outstanding Canadian bonds remained strong in the month of November, giving rise to a net capital inflow of \$490 million. This followed a record net inflow of more than \$600 million in October, when non-residents stepped up their purchases of Canadian bonds. The net foreign investment in outstanding Canadian bonds, mainly Government of Canada issues, came principally from the United States, Continental Europe and Japan. The gross value of bond trading activity with non-residents during November rose by a third to \$2.6 billion.

### ...The Labour Force

Columbia fell by 9,000, while little or no change was reported in the remaining provinces.

The seasonally adjusted level of unemployment for December 1984 slipped by an estimated 68,000 to 1,354,000. Unemployment declined for both males and females. A drop of 29,000 to 489,000 was observed for those aged 15 to 24; among those aged 25 and older, unemployment fell by 39,000 to 865,000. Provincially, unemployment declined by 40,000 in Quebec and by 22,000 in Ontario.

Unadjusted, the level of unemployment for Canada in December 1984 was 1,316,000, down 20,000 (-1.5%) from a year ago. The unemployment rate reached 10.7% during the month, 0.4% below the year-earlier level. The participation rate was 63.8%, an increase of 0.5% over that of last December. The employment/population ratio was 57.0%, a rise of 0.7% over the ratio of the previous year.

*Order the December 1984 issue of The Labour Force (71-001, \$3.85/\$38.50), or contact Ken Bennett (613-990-9448), Labour Force Survey.*

### Minority and Second Language Education

In the 1983-84 school year, 153,000 students outside Quebec were being educated in French schools; this represents 4% of the school population. In Quebec, 128,000 students or 12% of the school population were being educated in English.

More than 1.6 million students outside Quebec were enrolled in French second language programs in 1983-84. Of these, 118,000 were in immersion programs, which were virtually non-existent in 1970-71.

Participation in second language French outside Quebec has increased significantly to 46% from 38% in 1970-71. This increase was due to gains at the elementary level, rising to 51% from 29%; participation for secondary students has declined to 48% from 56%.

*Order Minority and Second Language Education, Elementary and Secondary Levels, 1983-84 (81-257, Canada: \$6.65; Other Countries: \$7.95), or contact Josephine Stanic (613-990-8354), Education, Culture and Tourism Division.*

Trading with non-residents in outstanding Canadian equities resulted in a small net outflow of \$12 million.

Residents of Canada increased their holdings of outstanding foreign bonds by \$127 million in November, following an increase of over \$300 million in the previous month. The gross value of resident trading activity on foreign bond markets remained high at over \$4 billion, largely reflecting trading in United States government issues. In trade in outstanding foreign equities, Canadian residents reduced their holdings by \$13 million in the current month.

*Order Security Transactions with Non-residents (67-002, \$2.75/\$27.50), or contact John Motala (613-990-9051), International and Financial Economics Division.*

### Share of Canadian New Car Market Held by Overseas Manufacturers



### New Motor Vehicle Sales

For the first time since February 1983, total unit sales of new motor vehicles dropped in November 1984 compared to the same month of the previous year, declining 0.7% to 99,942 units. This sudden reverse in the annual trend of auto sales seems to be mostly attributed to short term factors such as the strike which affected the Canadian auto industry in mid-October 1984. Sales of passenger cars made in North America fell by 12.3% to 51,234 units, while 22,361 new commercial vehicles were sold, a gain of 22.3% over the same month a year ago. Retail sales of passenger cars made overseas were 14.7% higher with 23,026 units sold, while sales of new commercial vehicles decreased 14.5% to 3,321 units.

The market share held by manufacturers from other countries almost doubled in November 1984 compared to the same month in 1983, increasing from 5.4% to 10.5% of total unit sales of new passenger cars. Japanese manufacturers held 20.5% of the market, recording a slight gain over their November 1983 share of 20.2%. North American manufacturers' share decreased to 69.0% in November 1984 from 74.4% in November 1983.

The total dollar value of all new motor vehicles sold in November increased 5.6% from a year earlier to \$1,266.9 million. North American passenger cars sold for \$589.5 million (down 11.1%) and sales of commercial vehicles built in North America totalled \$347.8 million (up 34.5%). Sales of passenger cars manufactured overseas rose by 22.4% to \$293.7 million, while commercial vehicles were 6.1% lower at \$35.8 million.

During the first 11 months of 1984, there were 1,200,359 new motor vehicles sold in Canada, 19.2% higher than the same period a year ago, with a retail value of \$14,607.2 million (up 29.3%).

*Order New Motor Vehicle Sales (63-007, \$2.75/\$27.50), or contact Jean-Pierre Simard (613-990-9665), Merchandising and Services Division.*



## Report of the Canadian Renal Failure Register

In Canada, more than 6,800 persons depend on dialysis or a kidney transplant for their survival. The **Report of the Canadian Renal Failure Register** provides information needed to evaluate treatment alternatives, to identify factors determining the success of kidney transplants and to study certain rare kidney diseases so that the most effective treatment can be planned for each patient.

Selected highlights from the report include:

- The total number of patients treated for irreversible kidney disease increased by 14.2% between 1982 and 1983. The largest increase was among patients with functioning transplants, 21.4%, compared with an increase of 9.2% in the number of patients on dialysis.
- In contrast to the period 1982 to 1983, which saw a large increase in the number of patients on peritoneal dialysis (20.1%) and no growth in the number of patients on haemodialysis, this year there was a larger increase in the number of patients on haemodialysis (10.6%) than peritoneal dialysis (6.5%).
- The number of transplants increased from 501 in 1982 to 649 in 1983, a rise of almost 30%. In spite of the encouraging increase, much larger increases in the number of transplants would be needed to reduce the dialysis population.

Copies of the 1983 Annual Report (price — \$5) can be obtained from the Kidney Foundation of Canada, Ottawa Valley Chapter, 1140 Morrison Drive, Suite 202, Ottawa K2H 8S9 or the Vital Statistics and Disease Registries Section (613-990-8553), Health Division, Statistics Canada.

## Department Store Sales by Regions

Department stores in Canada reported sales totalling \$1,254.7 million in November 1984, a 10.2% increase from a year earlier. Cumulative sales for January-November 1984 reached \$9,666.7 million, a rise of 5.1% over the level recorded during the same period in 1983.

On a regional basis, department store sales in November were as follows (percentage change from November 1983 in parentheses):

- Ontario, \$473.3 million (+10.0%);
- Quebec, \$229.6 million (+19.0%);
- British Columbia, \$188.1 million (+8.4%);
- Alberta, \$159.4 million (+1.1%);
- Atlantic provinces, \$97.4 million (+14.9%);
- Manitoba, \$65.9 million (+8.6%); and
- Saskatchewan, \$41.1 million (+5.1%).

Data users should note that the British Columbia figures include those for the Yukon and Northwest Territories.

Order the November 1984 issue of Department Store Sales by Regions (63-004, \$1.60/\$16), or contact the Retail Trade Section (613-990-9665), Merchandising and Services Division.

## New Housing Price Indexes

The New Housing Price Index (1981=100) for Canada stood at 94.5 in November, down 0.3% from its October level of 94.8. This index of Canadian housing contractors' selling prices now stands 0.6% lower than the year-earlier level of 95.1. Between October and November, the estimated House Only index decreased 0.1% to 97.1 while the estimated Land Only index declined 0.7% to 90.1.

Between October and November, the largest decrease was recorded for Edmonton (-3.9%). The most significant increases in the price index were recorded for Saint John-Moncton (3.4%) and St. Catharines-Niagara (1.7%).

Between November 1983 and November 1984 the largest year-over-year decrease was recorded for Edmonton (-10.6%), followed by Victoria (-9.9%), Calgary (-4.8%), Vancouver (-2.7%) and Regina (-0.6%).

The largest year-over-year increase was recorded for Saint John-Moncton (11.2%), followed by St. Catharines-Niagara (8.0%), Hamilton (5.5%), and London (5.0%).

Order Construction Price Statistics (62-007, \$3.30/\$33), or contact Prices Division (613-990-9601).

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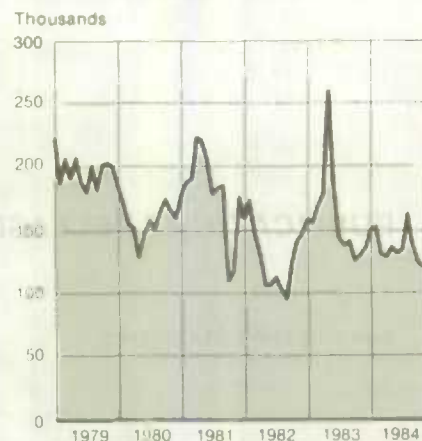
## Energy Statistics

Preliminary data for the first 10 months of 1984 show that production of all main energy forms increased compared to the same period of 1983. Advances were registered for coal (30.5%), crude oil (6.4%), natural gas (7.8%), electricity (8.4%), refined petroleum products (1.1%), and natural gas liquids (9.8%). However, the cumulative figures for crude oil and refined petroleum products hide a marked slowdown in the rate of growth in production from June onward.

Exports of all main energy forms also increased, but by volumes smaller than the increases of production. While coal imports have increased by 5 893 kilotonnes, crude

## Housing Starts in Canada

Seasonally Adjusted at Annual Rates



Source: Statistics Canada, Housing Starts and Completions

## Construction Activity

The leading indicator of construction activity in Canada (1971=100) fell in September, dropping 2.8% to 90.8. The slackening of construction intentions which occurred in August in the housing sector extended to the non-residential sector in September, contributing to the decline of the leading indicator.

The filtered index of residential construction continued to decline in September, slipping 3.2% to 89.6. Following a month of levelling off, intentions in the single-detached sector weakened in September. In contrast to the rest of Canada, the trend-cycle in the province of Ontario continued to be upward. The decline of the multi-family sector evident in the preceding months continued in September, induced by persistent decreases recorded in the provinces of British Columbia and Ontario.

The filtered index of non-residential construction fell in September, decreasing 2.2% to 91.6. After seven months of successive rises, the non-residential index posted a downward movement led by the commercial (-2.5%) and governmental (-5.5%) components. Meanwhile, the industrial index continued to progress steadily (+4.2%).

Contact Lizette Gervais-Simard (613-990-9689), Construction Division.

## Labour Income

Labour income for October 1984 was estimated at \$20,007.3 million, an increase of \$1,098.6 million or 5.8% from October 1983. Adjusted for seasonal variation, wages and salaries increased by \$77.4 million between September 1984 and October 1984 to \$17,697.3 million.

Order the October-December issue of Estimates of Labour Income (72-005, \$5.55/\$22.20) or contact Mrs. Gauthier (613-990-9900), Labour Division.

oil imports for the same 10-month period decreased slightly to 11 644 million litres.

Contact Richard Godin (613-990-9823), Manufacturing and Primary Industries Division.

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Apparent per capita food consumption in Canada, 1983	32-230	\$5	\$6
Farm wages in Canada, November 1984	21-002	\$2.75/\$11	\$3.30/\$13.20
Production and stocks of eggs and poultry, October 1984	23-003	\$2.75/\$27.50	\$3.30/\$33
Stocks of frozen meat products, December 1984	32-012	\$2.75/\$27.50	\$3.30/\$33
Stocks of fruit and vegetables, December 1, 1984	32-010	\$1.60/\$16	\$1.90/\$19
<b>BALANCE OF PAYMENTS</b>			
Security transactions with non-residents, October 1984	67-002	\$2.75/\$27.50	\$3.30/\$33
<b>CANSIM</b>			
Canadian statistical review, December 1984	11-003E	\$3.85/\$38.50	\$4.60/\$46
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Minority and second language education, elementary and secondary levels, 1983-84	81-257	\$6.65	\$7.95
<b>EXTERNAL TRADE</b>			
Imports by commodities, October 1984	65-007	\$5.55/\$55.50	\$6.65/\$66.50
<b>LABOUR</b>			
Preliminary unemployment insurance statistics, September 1984	73-001P	free	free
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Footwear statistics, November 1984	33-002	\$1.60/\$16	\$1.90/\$19
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Primary iron and steel, October 1984	41-001	\$2.75/\$27.50	\$3.30/\$33
Production, sales and stocks of major appliances, November 1984	43-010	\$1.60/\$16	\$1.90/\$19
Production, shipments and stocks on hand of sawmills East of the Rockies, October 1984	35-002	\$2.75/\$27.50	\$3.30/\$33
Production, shipments and stocks on hand of sawmills in British Columbia, October 1984	35-003	\$1.60/\$16	\$1.90/\$19
The sugar situation, November 1984	32-013	\$1.60/\$16	\$1.90/\$19
<b>MERCHANDISING AND SERVICES</b>			
Department store sales by regions, January-November 1984	63-004	\$1.60/\$16	\$1.90/\$19
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