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Weekly Bulletin

January 25, 1985

Consumer Price Index

National Highlights

The Consumer Price Index (CPI) for Canada (1981=100) rose 0.1% to a level of 124.1 in December. This marginal increase reflected the net result of increases in the housing and transportation components having been almost completely offset by lower charges for clothing and recreational items. The food index remained unchanged overall for the third consecutive month, while the all-items excluding food index rose a marginal 0.1%.

The year-to-year increase in the CPI, as measured by comparing the index level of December 1984 to that of December 1983, was 3.8%, down from the 4.0% registered in November. On an annual average basis, that is, comparing the average of the 12 monthly indexes for the years 1983 and 1984, the CPI increased by 4.4%. This was down from the 5.8% rise registered between 1982 and 1983, representing the smallest annual increase since 1971.

(continued page 2, col. 1)

Manufacturing Industries

Preliminary estimates show the seasonally adjusted value of shipments in all Canadian manufacturing industries increased 4.1% to \$19,368.7 million in November 1984 from the October revised estimate of \$18,612.6 million. Shipments of durable goods were up 6.4% to \$8,882.6 million from \$8,346.9 million, an increase of \$376.0 million in transportation equipment industries and an increase of \$69.9 million in electrical products industries accounted for most of the gain. Increases of \$66.6 million in food and beverage industries and \$63.0 million in petroleum and coal products industries were the major contributors to a 2.1% increase in non-durable goods industries, as shipments went from \$10,265.7 million to \$10,486.1 million.

Seasonally adjusted inventories owned by manufacturers at the end of November was \$33,289.2 million, down 0.2% from the previous month's revised value of \$33,340.5 million. This marks the first decline since June 1984. Total inventory held was virtually unchanged at \$34,551.7 million from \$34,541.4 million, with increases of 1.3% in goods in process and 0.1% in finished products. There was, however, a 0.8% decrease in raw materials.

(continued page 2, col. 2)

LATEST MONTHLY STATISTICS

EMPLOYMENT, INCOME

			Previous Month	% Change From Year Ago
Average Weekly Earnings (\$)	Oct.	407.3	408.99	-0.4
Labour Income (\$ million)	Oct.	20,007.4	20,027.0	5.8
Persons with Jobs (million)	Dec.	10.9	11.05	2.4
Unemployed	Dec.	1,316,000	1,355,000	-1.5

INVENTORIES

Department Store (\$ million)	Nov.*	3,950.5	3,924.2	2.5
Manufacturers' Owned (\$ million)	Nov.*	32,862.5	32,916.3	7.8

ORDERS

Manufacturers' New Orders (\$ million)	Nov.*	19,856.5	20,278.2	8.0
Manufacturers' Unfilled Orders (\$ million)	Nov.*	22,183.8	22,223.0	9.1

PRICES

Consumer Price Index (1981=100)	Dec.*	124.1	124.0	3.8
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

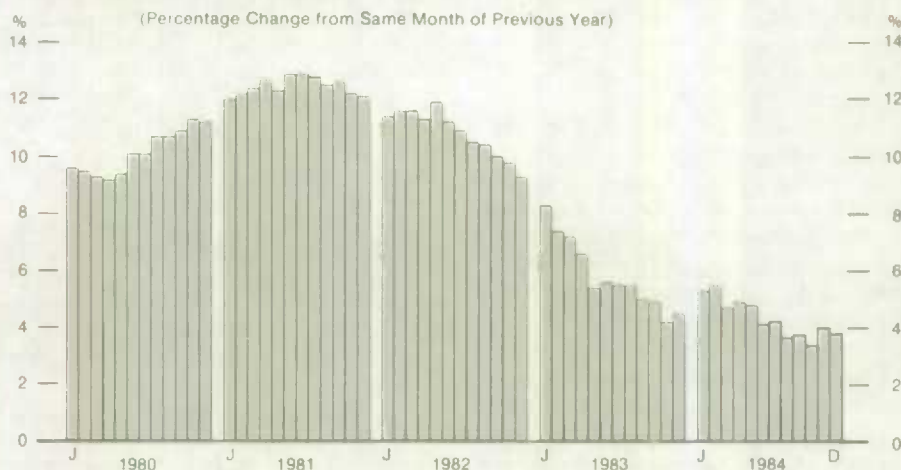
Department Store Sales (\$ million)	Nov.*	1,254.7	9,666.7	5.1
Manufacturers' Shipments (\$ million)	Nov.*	19,895.8	207,942.6	13.7
New Motor Vehicle Sales (\$ million)	Nov.	1,266.9	14,607.2	29.3
Retail Sales (\$ million)	Nov.*	10,462.9	103,039.0	9.0

Statistics are in current dollars and are not seasonally adjusted.

* - new this week.

Consumer Price Index for Canada (CPI)

(1981=100)



Source: Statistics Canada, The Consumer Price Index (62-001)

Canada

...Consumer Price Index

The food index remained unchanged overall in December as a slight decline of 0.1% in the index for food purchased from stores offset an increase of 0.4% in the index for food purchased from restaurants. In the food purchased from stores index, price decreases for poultry, fresh fruit (notably oranges), salad vegetables and soft drinks for home consumption were largely offset by price increases for beef, pork, dairy products and bread. The index for food purchased from stores now stands 4.9% above its level of December 1983 while the index for food purchased from restaurants is 4.1% higher than it was in December 1983. The resulting rise in the year-to-year increase in the aggregate food index was 4.6%, down from the 5.0% recorded in November.

The marginal 0.1% increase in the all-items excluding food index resulted from a number of significant but largely offsetting price changes. Higher prices for housing resulted from increased charges for rent, cleaning supplies and furniture while the increase in the transportation component was due to higher prices for gasoline and for overseas and southern holiday air fares. These price increases were largely offset by declines in the prices of men's and women's clothing and by lower prices for home entertainment equipment and hotel/-motel accommodation rates. Between December 1983 and December 1984, the all-items excluding food index rose by 3.5%, down from the increase of 3.7% observed in November.

On a seasonally-adjusted basis, the all-items index increased 0.3% between November and December, with the food index increasing 0.4% and the all-items excluding food index rising 0.3%. During the three-month period September to December, the all-items index rose at a seasonally-adjusted compounded annual rate of change of 4.5%.

Annual Averages

The food index was the only major component that did not contribute to the deceleration in the rate of increase in the all-items index, from 5.8% in 1983 to 4.4% in 1984. The food index accelerated to 5.6% from 3.7% between these two years, largely due to more rapid price increases for poultry, fruits and vegetables, coffee, tea and fats and oils. The major contributor to the deceleration in the all-items index was the slowing of the housing index where smaller price increases for rent, mortgage interest, fuel oil and piped gas were major factors. Within the remaining five major components, notable contributions to the overall deceleration were made by lower rates of increase for gasoline, auto insurance premiums and tobacco products.

Order the December 1984 issue of The Consumer Price Index (62-001, \$2.75/\$27.50), or contact Sandra Shadlock or Suzanne Gratton (613-990-9606), Prices Division.

Trusteed Pension Plans

The book value of assets of trusteed pension funds at the end of 1983 amounted to \$84.6 billion, an increase of \$12.7 billion or nearly 18% from a year earlier. These assets were held for 3.1 million pension plan members, equivalent to an average of \$27,128 of invested reserves for each member. The market value of these assets was \$92.1 billion, 9% higher than the book value.

Nearly 96% of these assets at book value were held for defined benefit pension plans and only 3% for defined contribution plans. Public sector pension funds, while representing only 230 of a total of nearly 3,600, held almost one-half of the assets at book value. The 191 master trust or consolidated pension funds covered nearly 13% of the total assets.

Order the 1983 edition of Trusteed Pension Plans, Financial Statistics (74-201, \$5), or contact Hubert Frenken (613-990-9900), Pensions Section, Labour Division.

...Manufacturing Industries

The seasonally adjusted ratio of total inventory owned to shipments at the end of November was 1.72:1, down from 1.79:1 in October. The ratio of finished products inventory to shipments went from 0.64:1 in October to 0.62:1 in November.

The value of new orders received in November, seasonally adjusted, increased 2.9% to \$19,431.1 million from the revised estimate of \$18,884.2 million. In durable goods industries, new orders with an estimated value of \$8,872.5 million were 2.9% higher than the October value of \$8,623.7 million. A \$657.3 million increase in transportation equipment industries was partly offset by decreases of \$230.9 million in metal fabricating industries, \$220.3 million in machinery industries and \$89.5 million in primary metal industries. In non-durable goods industries, new orders received were valued at \$10,558.6 million, up 2.9% from the revised October estimate of \$10,260.5 million.

The seasonally adjusted unfilled orders backlog at the end of November was \$22,434.6 million, up 0.3% from the revised October estimate of \$22,372.2 million. Unfilled orders in durable goods industries decreased 0.1% to \$20,142.5 million from \$20,152.6 million at the end of October. In non-durable goods industries, the estimate was up 3.3% to \$2,292.1 million from \$2,219.6 million.

Not adjusted for seasonal variation, manufacturers' shipments in November 1984 were valued at \$19,895.8 million, 1.0% lower than the revised October value of \$20,098.9 million. Cumulative shipments for the first 11 months of 1984 were an estimated \$207,942.6 million, up 13.7% from the \$182,928.6 million estimated for the same period in 1983.

Order the November 1984 issue of Inventories, Shipments and Orders in Manufacturing Industries (31-001, \$3.85/\$38.50) or contact J. Lepage (613-990-9832), Manufacturing and Primary Industries Division.

Education Spending

Total spending on education in Canada is estimated to reach \$31.7 billion in 1984-85, an increase of 3.8% over the previous year and the smallest annual increase noted since 1972-73.

British Columbia and Newfoundland are the only two provinces where decreases in education spending are expected in 1984-85 (-0.4% and -8.9% respectively). For other provinces and territories, anticipated growth rates will range from 1% in Quebec to 7.4% in Saskatchewan and Prince Edward Island.

In 1983, total education expenditures as a percent of Gross National Product were estimated to be 7.8%, down from 7.9% in the previous year. The all-time high was 9.0% in 1970.

Education costs per capita of population were estimated to be \$1,227 in 1983, an increase of 6.5% over 1982. Per labour force member, costs were \$2,507, up 5.8% from the previous year. These 1983 growth rates were the lowest annual increases observed since 1979.

Governments finance more than 90% of all education expenditures. Nevertheless, from 1981-82 to 1984-85, private sources of funding are growing at a faster rate than public sources. Private sources now account for an estimated 8.8% of total funding in 1984-85, up from 7.7% in 1981-82. More than half of the increase in private funding is due to tuition fee revenues.

To order the publication Education Statistics Bulletin, Vol. 6, No. 8 (81-002, \$1.60/\$16), phone (613)993-5078. For more detailed information, contact François Gendron (613-990-8356), Education, Culture and Tourism Division.

Union Wages

The Canada total Union Wage Rate Index (1981=100) for construction trades (including supplements) registered no change between November and December 1984, remaining at a level of 127.6.

In December, the total Union Wage Rate Index for construction trades stood 0.3% above its year-ago level of 127.2. This modest year-over-year increase was due partly to the absence of changes in union wage rates for Quebec and the Western provinces, coupled with the fact that increases recorded for major cities in Ontario and in Saint John, New Brunswick were in the order of less than one percent. Only in Halifax did wage rates increase sharply over a twelve-month period (10.3%). Conversely, the index for St. John's, Newfoundland posted a decrease of 6.0%.

On an annual average basis, a comparison of the 12 indexes for 1984 with those of 1983 indicate the Union Wage Rate Index for Canada increased only 3.6%, the smallest increase in the 24-year history of the Union Wage Rate Index series.

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

Retail Trade

Unadjusted Sales:

Preliminary estimates show total retail sales in Canada increased 10.4% in November 1984 over the same month last year to \$10,452.9 million in current dollars (not adjusted for inflation). The sales estimated for October 1984 were revised upward to \$9,868.4 million, a 9.2% gain over the October 1983 figure. Among the factors contributing to the rise in the November 1984 estimates compared to the year-earlier estimates were the strikes experienced last year that affected the sales of combination stores in Quebec and the retail outlets of the British Columbia Liquor Control Board.

The most important increases in November 1984 were reported by used car dealers (+24.7%), garages (+20.8%) and women's clothing stores (+18.0%), while the most notable declines were recorded by household appliance stores (-10.1%), furniture, T.V., radio and appliance stores (-3.1%) and automotive parts and accessories stores (-2.3%).

Cumulative retail sales for the first 11 months of 1984 were \$103,039.0 million, up 9.0% over the same period a year ago.

Seasonally Adjusted Sales:

Adjusted for seasonal fluctuations, holidays and the number of selling days, November 1984 retail trade estimates were 0.8% higher than the previous month, with sales of \$9,803.8 million. Major gains were reported by used car dealers (+10.7%), household furniture stores (+6.2%) and men's clothing stores (+4.0%), while the most notable declines were recorded in automotive parts and accessories stores (-4.1%), book and stationery stores (-3.1%) and household appliance stores (-2.4%).

Decreased sales were registered in Prince Edward Island (-1.4%), Yukon and Northwest Territories (-0.8%), Alberta (-0.4%), Saskatchewan (-0.3%) and British Columbia (-0.2%) compared to the previous month, while all the remaining provinces posted increases ranging from 2.5% in Nova Scotia to 0.2% in Ontario. Rises were also reported in Winnipeg (+1.8%), Montreal (+0.9%) and Toronto (+0.8%), while Vancouver sales were 0.2% lower.

Order the November 1984 issue of Retail Trade (63-005, \$3.85/\$38.50), or contact Jean-Pierre Simard (613-990-9665), Merchandising and Services Division.

Department Store Sales

Unadjusted Sales

Total department store sales in Canada for November 1984 registered an increase of 10.2% over the corresponding month of 1983 to \$1,254.7 million in current dollars (not adjusted for inflation). Sales were higher in 36 of the 40 departments for which data are collected, with the major gains in furs (+27.4%), girls' and teenage girls' wear (+24.2%) and linens and domestics (+18.6%). The largest decreases were reported in piece goods (-10.7%), plumbing, heating and building materials (-7.1%) and

gasoline, oil, auto accessories, repairs and supplies (-3.8%).

All provinces and territories indicated increased department store sales in November 1984 over November 1983. Gains ranged from 1.1% in Alberta to 19.4% in Nova Scotia. With the exception of Calgary (-0.1%), the remaining nine metropolitan areas surveyed reported sales increases in November 1984, with gains ranging from 1.5% in Edmonton to 23.7% in Halifax-Dartmouth.

Sales by major department store organizations totalled \$798.5 million in November 1984, up 7.6% over the year-earlier level. Junior department store organizations had sales of \$456.3 million, a 15.0% rise from November 1983 sales.

Cumulative unadjusted sales for all department stores for the first 11 months of 1984 reached \$9,666.7 million, an increase of 5.1% over the \$9,199.4 million reported for the same period in 1983.

Department store sales constituted 12.0% of total retail trade in Canada in November 1984, the same proportion registered a year earlier.

Seasonally Adjusted Sales

Adjusted for seasonal fluctuations, holidays and the number of trading days, total department store sales in November 1984 increased 3.2% to \$980.5 million from the previous month's sales. Among the 33 departments recording higher sales, the largest increases were reported in furs (+16.6%), floor coverings (+12.1%) and linens and domestics as well as in girls' and teenage girls' wear (+10.6%). The largest decreases in sales were registered in toys and games (-7.5%), gasoline, oil, auto accessories, repairs and supplies, as well as in women's and misses' dresses, housedresses, aprons and uniforms (-6.2%) and in piece goods (-0.8%).

Order the November 1984 issue of Department Store Sales and Stocks (63-002, \$3.33/\$33), or contact Jean-Pierre Simard (613-990-9665), Retail Trade Section, Merchandising and Services Division.

Wholesale Trade

Sales

Wholesale merchants' sales increased strongly in November 1984, advancing 13.4% over the same period last year. Revised sales for October 1984 were up 13.2% from the October 1983 level.

In November 1984, all major trade groups registered sales increases from a year earlier. The most notable gains were reported by the following major trade groups: farm machinery and equipment (+33.7%); other machinery and equipment (+27.0%), and tobacco, drugs and toilet preparations (+14.7%). All regions posted sales increases from a year earlier, ranging from 17.7% in Ontario to 9.7% in the Prairie provinces.

Cumulative sales by wholesale merchants for the first 11 months of 1984 were up 12.5% over the January-November 1983 period. Exceptional gains were reported by wholesalers of motor vehicles and accessories (+23.4%), and metals, hardware, plumbing and heating equipment (+19.8%).

Inventories

Wholesale inventories in November 1984 increased by 10.1% from the corresponding period in 1983. Revised inventories for October 1984 were up 8.7% from the October 1983 level.

The ratio of inventories to sales at the end of November 1984 was 1.55:1, down from 1.59:1 a year earlier.

Order the November 1984 issue of Wholesale Trade (63-008, \$1.60/\$16), or contact the Wholesale Trade Section (613-990-9679), Merchandising and Services Division.

Refined Petroleum Products and Natural Gas

Refined Petroleum Products

During November 1984, sales of petroleum products by Canadian refiners and major distributors amounted to 6 767 600 cubic metres, down 0.6% from the level recorded in November 1983.

For the first 11 months of 1984, sales of refined petroleum products amounted to 71 854 973 cubic metres, up 0.6% from the level recorded during the same period of 1983.

Natural Gas

During November 1984, sales of natural gas by main distributors amounted to 4 546 924 thousand cubic metres, up 8.4% from the level recorded during November 1983.

For the first 11 months of 1984, sales of natural gas amounted to 42 020 976 thousand cubic metres, up 10.2% from the level recorded during the same period of 1983. On the basis of rate structure information, sales were broken down as follows: residential sales, 10 461 634 thousand cubic metres (+9.0%); commercial sales, 8 641 573 thousand cubic metres (+7.1%) and industrial sales, 22 917 769 thousand cubic metres (+12.1%).

Order the November 1984 issues of Refined Petroleum Products (45-004, \$3.85/\$38.50) and Gas Utilities (55-002, \$2.75/\$27.50), or contact Richard Godin (613-990-9823), Manufacturing and Primary Industries Division.

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