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Weekly Bulletin

November 8, 1985

## International Trade

Preliminary estimates show Canada's exports, seasonally adjusted on a balance of payments basis, climbed to a record value of \$10.7 billion in September, up 7.0% over August and a gain of nearly 20% from the July total.

Imports fell a fraction of a per cent, remaining at \$8.9 billion. As a result, the merchandise trade surplus rose to \$1.8 billion, \$0.8 billion over the balance in August.

### Quarter-to-Quarter

Exports in the third quarter declined 1.1% to \$29.6 billion, following a slight increase of 0.4% in the second quarter. Imports rose 4.4% in the third quarter to \$26.4 billion, repeating the 4.4% increase in the second quarter and slightly surpassing the 4.3% increase in the first quarter. The net effect on the merchandise trade balance was a decline of more than \$1.4 billion in the third quarter to \$3.2 billion. This was the third consecutive drop in the quarterly trade balance, bringing it to \$2.1 billion below the third quarter balance of last year.

During the first nine months of this year, the cumulative trade surplus totalled \$13.3 billion, down from \$14.8 billion in 1984.

(Continued on page 2, col. 1)

## Department Store Sales

Department stores in Canada reported sales totalling \$964.8 million in September 1985, an increase of 1.8% from a year earlier.

Cumulative sales for the period January to September 1985 totalled \$7,828.9 million, up 5.0% from the same period in 1984.

On a regional basis, department store sales during the month were as follows (percentage change from September 1984 in parentheses):

- Atlantic Provinces, \$65.0 million (-1.2%);
- Quebec, \$179.5 million (+1.9%);
- Ontario, \$351.0 million (+2.9%);
- Manitoba, \$50.6 million (-3.5%);
- Saskatchewan, \$30.5 million (-3.0%);
- Alberta, \$134.8 million (+5.3%);
- British Columbia, \$153.4 million (+2.8%).

Order the September 1985 issue of *Department Store Sales by Regions* (63-004, \$4/\$40), or contact Lina Di Piéto (613-990-9824), Retail Trade Section, Industry Division.

## LATEST MONTHLY STATISTICS

### EMPLOYMENT, INCOME

			Previous Month	% Change From Year Ago
Average Weekly Earnings(\$)	July	419.84	419.81	3.7
Labour Income (\$ million)	Aug.*	21,034.9	21,068.9	6.9
Persons with Jobs (million)	Sept.	11.47	11.83	2.7
Unemployed	Sept.	1,183,000	1,253,000	-13.2

### INVENTORIES

Department Store (\$ million)	Aug.	3,481.8	3,393.3	1.4
Manufacturers' Owned (\$ million)	Aug.	34,132.2	33,856.2	3.8

### ORDERS

Manufacturers' New Orders (\$ million)	Aug.	20,249.2	19,339.3	5.3
Manufacturers' Unfilled Orders (\$ million)	Aug.	22,764.5	22,668.6	2.1

### PRICES

Consumer Price Index (1981 = 100)	Sept.	128.0	127.8	4.1
New House Price Index (1981 = 100)	Aug.	96.4	95.9	1.4
Raw Materials Price Index (1977 = 100)	Sept.	216.3	216.1	1.4
Excl. coal, crude oil, nat. gas	Sept.	152.5	152.8	-2.6
Industry Selling Price Index (1971 = 100)	Sept.	319.5	318.8	2.3

### CONSTRUCTION

			Year-to-date	
Building Permits (\$ million)	Aug.	1,915.1	12,432.9	21.8
Housing Starts - Urban Centres (units)	Sept.*	13,265	99,043	17.1

### ENERGY

Coal Production (thousand tonnes)	July	4,112	35,937	12.0
Electricity Generation (gigawatt hours)	Aug.*	34,541	292,680	4.7
Natural Gas Production (million cubic metres)	July	6,326	55,885	9.4
Petroleum Refining (thousand cubic metres)	Aug.	7,851	56,560	-4.8

### FOREIGN TRADE

Exports - Balance of Payments Basis (\$ million)	Sept.*	10,488	88,310	6.7
Imports - Balance of Payments Basis (\$ million)	Sept.*	8,411	75,861	10.5

### PRODUCTION

Railway Carloadings (million tonnes)	Aug.	18.9	157.2	-0.7
Steel (ingots - thousand tonnes)	Sept.	1,250	10,812	-1.9

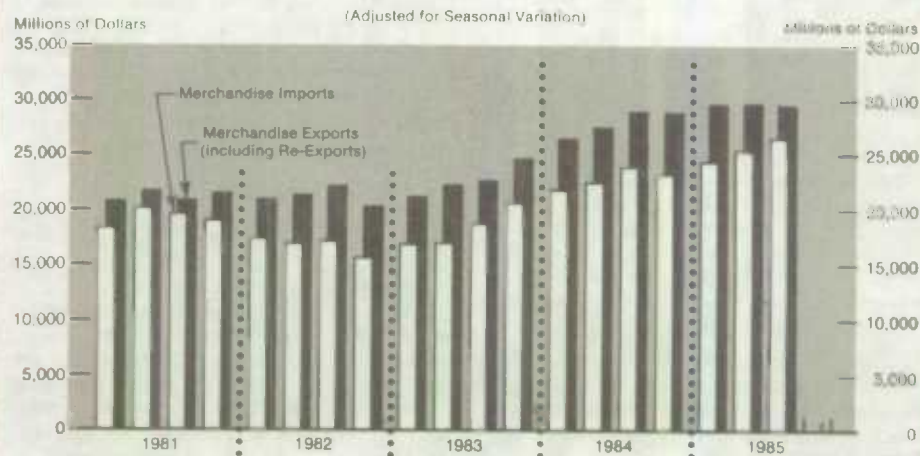
### SALES

Department Store Sales (\$ million)	Sept.*	964.8	7,828.9	5.0
Manufacturers' Shipments (\$ million)	Aug.	20,089.6	158,685.8	6.5
New Motor Vehicle Sales (\$ million)	Aug.	1,598.2	13,401.5	24.1
Retail Sales (\$ million)	Aug.	11,133.4	81,872.8	10.2

Statistics are in current dollars and are not seasonally adjusted.

\* - new this week.

## Canadian Merchandise Exports and Imports\*



\* Balance of Payments Basis

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

Canada



## ... International Trade

### Short-Term Trend

The short-term trend rate of growth for exports, which provides a clearer picture of the month-to-month movements in trade, showed strong positive growth recovering from declines in the second quarter.

The short-term trend for imports continued to show steady growth of 1%-2% each month.

### Commodity Analysis

Total exports increased \$696 million in September. A large part of this increase was due to wheat which nearly doubled from August to \$435 million. Another food export, fish products, rose by one-third to a record \$204 million, with much of the increase going to Japan. Exports of crude petroleum climbed \$135 million, up 31.6% from August, while exports of petroleum and coal products increased \$50 million, up 24.9% from the previous month. Iron ores, which have generally fallen since January, showed an increase of \$56 million (72%). Exports of lumber advanced 5.7% and newsprint exports increased 4.0%. Exports of automobiles rose \$133 million to \$1,700 million, a record value for the second month in a row. Exports of parts have not recovered to the same extent, but an increase of \$75 million (8.1%) returned them to levels set at the beginning of the year. Exports of trucks dropped \$127 million from last month's high level and continued the downward movement begun in January. Other declines occurred in precious metals, down 47.8%, electricity, down 28% and industrial machinery, down 10.2%.

A drop of \$300 million in automobile parts, down 18% from the high level set in August, was responsible for the decline of \$61 million in total imports. Imports of cars also fell slightly (-1.9%), while imports of trucks rose 38.1% to a record \$336 million. Aircraft imports climbed \$135 million (73.8%) from the low level set in August. Crude petroleum imports were up \$117 million (46.9%). Coal imports, on the other hand, dropped \$27 million (-27.7%) and petroleum and coal products fell \$60 million (-40.0%). Imports of precious metals were up \$44 million, sustaining a notably higher level than last year.

### Trading Partner Analysis

Exports to the United States rose 5.8% to a record \$8.4 billion. Much of the increase was attributable to increased exports of petroleum and automotive products. Exports to the United Kingdom and "other E.E.C. countries" rose 27% with increased shipments of minerals, lumber and newsprint. Exports to Japan rose 10.6% while exports to "other O.E.C.D. countries" fell 28.1%.

Despite increases for trucks and aircraft, imports from the United States fell 2.9%, mainly due to a drop in auto parts. Imports from the United Kingdom were up 4.7%, while "other E.E.C. countries" fell 2.5%. Imports from Japan remained unchanged, while imports from "other countries" rose 19.1%.

Order the September 1985 issue of *Summary of Canadian International Trade* (65-001, \$15/\$150), or contact G. Blaney (613-990-9647).



## Canadian International Trading Patterns

This timely new publication uses more than 80 coloured charts in graphically portraying Canada's international trade position over the 15-year period 1970-1984.

In light of current discussions on trade enhancement, this publication (65-503, \$25) should be a *must* for almost everyone.

Copies are now available from Publication Sales and Services (613-993-7276), or contact François Bordé (613-990-1711) for further information.

## Federal Government Enterprises

Federal government enterprises (including their foreign subsidiaries) had income totalling \$26,349 million in the fiscal year ended nearest to December 31, 1984. Expenditure for the corresponding period amounted to \$26,127 million. On a financial management basis this resulted in a net loss of \$209 million after provision for income tax.

Order *Federal Government Enterprise Finance, 1984* (61-203, \$20).

## Farm Input Price Index

The Farm Input Price Index (FIPI, 1981=100) for Canada stood at a preliminary level of 107.0 in the third quarter of 1985, down 1.6% from the revised second quarter level of 108.7. Compared to the third quarter 1984, the index declined 1.2%. This is only the second year-over-year decrease recorded since 1961. (The earlier four-quarter decrease of 0.9% occurred between the second quarters of 1982 and 1983.)

The most significant contributor to the quarterly change was the animal production index which declined by 4.6% mainly due to lower prices for feeder cattle (-6.1%) and feed (-4.4%). Also declining were indexes for machinery and motor vehicles (-0.3%) and for interest (-2.7%). These decreases were partially offset by increases for building and fencing (2.3%), as well as hired farm labour (0.7%).

The four-quarter change was mainly a result of a sharp decline in the animal production index (-6.7%). This was mainly due to lower prices for weanling pigs (-12.0%) and feed prices (-12.1%).

Regionally, the Eastern Canada total index was down 1.6% from the second quarter and now stands 3.1% below its year-ago level. In Western Canada, the total index was down 1.7% from the previous quarter, but was up 0.2% over the year-ago level.

Order the third quarter 1985 issue of *Farm Input Price Indexes* (62-004, \$10/\$40).

## Marriages

A total of 185,597 marriages were recorded in Canada in 1984, up 0.5% from the 184,675 marriages recorded in 1983.

At the provincial level, increases in marriages were recorded in 1984 in Quebec (1,289), Ontario (1,029), Nova Scotia (293), Manitoba (132), Prince Edward Island (120) and New Brunswick (34). Decreases were registered in Alberta (-1,120), British Columbia (-295), Newfoundland (-211), Saskatchewan (-291), the Yukon (-31) and the Northwest Territories (-27).

Order *Marriages and Divorces, 1984* (84-205, \$12/\$13), or contact Jean Shane (613-991-1772), Health Division.

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## Weekly Bulletin

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## Business Conditions

Canadian manufacturers reporting to the October 1985 Business Conditions Survey forecast higher production in the fourth quarter of 1985 compared to the previous quarter. Higher production is expected by manufacturers representing 33% of total respondents' shipments whereas lower production is anticipated by 21%.

This relatively optimistic outlook was fuelled by a rise in new orders received, with 28% reporting rising new orders and 23% of the industry reporting declines.

The backlog of unfilled orders was reported as about normal by manufacturers representing 69% of total respondents' output.

Canadian manufacturers continue to be cautious about inventory build-up though, with 93% indicating their stocks of finished products are either too high or about right.

Contact T. Newton (613-991-3554), Industry Division.

## Labour Income

Labour income for August 1985 was estimated at \$21,034.9 million, an increase of \$1,351.3 million or 6.9% from August 1984.

Adjusted for seasonal variation, wages and salaries decreased by \$61.2 million between July 1985 and August 1985 to \$18,873.3 million.

Order the July - September 1985 issue of *Estimates of Labour Income* (72-005, \$15/\$60), or contact Georgette Gauthier (613-990-9900), Labour Income Section, Labour Division.

## Electric Power Statistics

The net generation of electricity in Canada totalled 34 541 gigawatt hours in August 1985, an increase of 2.4% from the 33 745 gigawatt hours recorded a year earlier.

Exports of electric power increased 2.1% to 4 617 gigawatt hours from 4 524 gigawatt hours a year earlier, while imports decreased 25.7% to 94 gigawatt hours from the August 1984 level of 126 gigawatt hours.

Exports of electricity rose 6.2% to 28 913 gigawatt hours for 1985, up 6.2% from the 27 219 gigawatt hours recorded during the January to August 1984 period. Imports of electricity rose 8.7% to 1 916 gigawatt hours from 1 763 gigawatt hours.

Order the August 1985 issue of *Electric Power Statistics* (57-001, \$8/\$80), or contact Dave Madison (613-991-3565), Energy Section, Industry Division.

## The Dairy Review

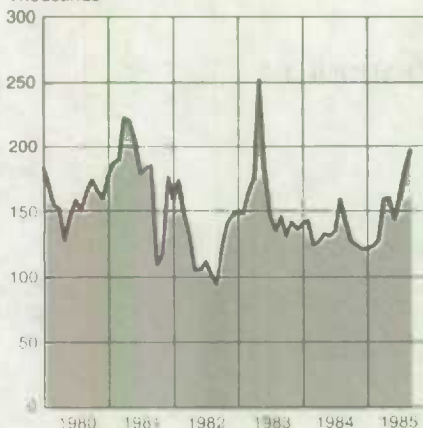
Creamery butter production in Canada during September 1985 totalled 6 887 tonnes, a decrease of 13.3% compared to September 1984. The September 1985 production of cheddar cheese amounted to 5 272 tonnes, an increase of 13.0% from the year-earlier figure.

Order the September 1985 issue of *The Dairy Review* (23-001, \$10/\$100), or contact Dave Burroughs (613-990-8714), Agriculture and Natural Resources Division.

## Housing Starts in Canada

Seasonally Adjusted at Annual Rates

Thousands



Source: Statistics Canada, Housing Starts and Completions

## Machinery and Equipment Price Index

The Machinery and Equipment Price Index (MEPI, 1971=100) stood at the preliminary level of 296.7 in the third quarter of 1985, down marginally from the revised level of 296.8 for the second quarter of 1985. The component for prices of domestically produced machinery and equipment rose 0.3% in the latest quarter, while the more heavily weighted imported goods component of the total index declined 0.3%, partially reflecting a strengthening of the Canadian dollar against the U.S. dollar during that period.

Between the third quarters of 1984 and 1985, the total index rose 4.0%, a marked slowdown from the 5.3% year-over-year change registered in the second quarter of 1985. Prices for domestically produced machinery and equipment increased 3.7%, while imported goods prices rose 4.2%, largely due to the Canadian dollar, which was weaker against its U.S. counterpart.

By industry division, price movements in the latest quarter ranged from a 0.5% decline for machinery and equipment purchased by the agriculture industry to an increase of 0.5% for goods purchased by the finance, insurance and real estate industry. The impact of decreases in agriculture and in the construction industries was dampened by a rise of 0.1% in the heavily weighted manufacturing industry.

Order Construction Price Statistics (62-007, \$15/\$60), or contact L. Graham (613-990-9601), Prices Division.

## Passenger Bus and Urban Transit Statistics

In September 1985, 67 Canadian urban transit systems collected 112,586,018 initial passenger fares. Operating revenues amounted to \$77,584,172.

During the same period, 16 passenger bus carriers earning \$500,000 or more annually from intercity and rural bus operations, carried 1,975,872 fare passengers and earned \$17,352,599 in operating revenues.

## Housing Starts

Housing starts in September were at a seasonally adjusted annual rate of 197,000 units for all areas, up from 183,000 units in August.

The third quarter 1985 rate was 185,000 units, a 19% increase over the second quarter. Most of this upswing resulted from an increase in single-detached starts.

Order the September 1985 issue of *Housing Starts and Completions* (64-002, \$15/\$150), or contact P. Pichette (613-990-9689), Science, Technology and Capital Stock Division.

## Construction Building Material Price Indexes

The price index for residential construction building materials (1981=100) rose to 121.6 in September, up 0.6% from its revised August level of 120.9. This index now stands 5.9% higher than its year-ago level of 114.8.

Between August and September 1985, increases were noted in three of the four components. The largest increase was reported for architectural materials (0.9%), followed by electrical materials (0.8%) and mechanical materials (0.2%). Structural materials declined by 0.1%. The change in the total index was mainly attributable to price increases for plywood and gypsum wallboard.

Between September 1984 and September 1985, the largest year-over-year price increase was recorded for structural materials (7.7%), followed by architectural materials (6.6%). Electrical materials (2.1%) and mechanical materials (0.8%) also increased.

## Non-residential

The non-residential construction building material price index (1981=100) rose to 120.4 in September, up 0.2% from its revised August level of 120.1. This index of non-residential building material prices now stands 4.6% higher than its year-ago level of 115.1.

Between August and September 1985, increases were noted in three of the four components. The largest increase was reported for electrical materials (0.5%), followed by architectural materials (0.3%) and mechanical materials (0.2%). Structural materials declined by 0.1%. The rise in the total index was mainly attributable to price increases for plywood, incandescent lighting fixtures and gypsum wallboard.

Between September 1984 and September 1985, architectural materials increased 5.4%, followed by structural and mechanical materials each at 4.3% and electrical materials (2.3%).

Order the third quarter 1985 issue of *Construction Price Statistics* (62-007, \$15/\$60), or contact Don DeGenova (613-990-9601), Prices Division.

Order the September 1985 issue of *Passenger Bus and Urban Transit Statistics* (53-003, \$6.50/\$65), or contact Yvan Deslauriers (613-990-8700), Transportation Division.



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Production and Stocks of Eggs and Poultry, August 1985	23-003	\$10/\$100	\$11/\$110
Stocks of Frozen Meat Products, October 1985	32-012	\$10/\$100	\$11/\$110
<b>CANSIM</b>			
Canadian Statistical Review, October 1985	11-003E	\$20/\$200	\$21.50/\$215
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Fruit and Vegetable Preservation, Service Bulletin, Vol. 14, no. 1, 1984 and 1985	32-023	\$6/\$100	\$7/\$110
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Imports by Commodities, August 1985	65-007	\$50/\$500	\$60/\$600
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