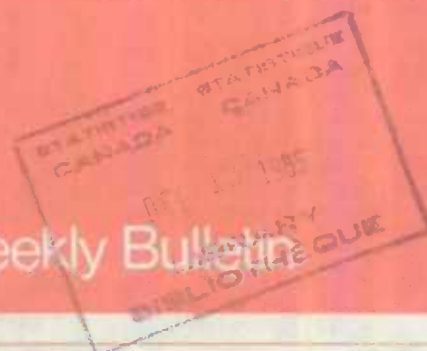


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Weekly Bulletin



December 13, 1985

International Trade

Month-to-Month (Seasonally Adjusted)

Balance of Payments Basis

Preliminary estimates show that Canada's merchandise exports continued to rise in October, reaching a record \$10.9 billion. This increase of 2.1% over the September value was the third consecutive monthly advance.

Imports fell by 2.0% to \$8.7 billion, remaining essentially at the level set in July. The resulting merchandise trade balance for October stood at \$2.2 billion, up \$0.4 billion from the previous month. The October value (close to the record value of \$2.3 billion set in March) represented a substantial recovery from the surplus of only \$0.3 billion in July.

Short-term Trend

The short-term trend for exports continued to show strong growth, recovering from declines during the summer. This pattern of recovery could be seen in most commodity sectors, but was most evident in agricultural and fish products and in the energy sector. The short-term trend for imports has remained virtually flat since August.

Commodity Analysis

Total exports increased by \$223 million in October. Half of this increase was due to exports of coal which rose by \$110 million to \$257 million, the highest value ever. As well, exports of refined petroleum and coal products rose \$85 million to \$338 million, recovering from a low of \$184 million in July. Export levels for other energy products either did not change (crude petroleum) or declined slightly (natural gas). Exports of fish dropped \$56 million from a high September level. Wheat reached the highest value for this year with a 5% increase. Exports of iron ore dropped substantially, attributable to a three-week closing of the St. Lawrence Seaway. In the automotive sector, increased exports of trucks (up 15.9%) were offset by declines in automobiles (down 2.3%) and automotive parts (down 2.8%).

Trading Partner Analysis

Exports to the United States declined by \$72 million, reflecting lower exports of fish, iron ore and natural gas. Exports to the United Kingdom and "other EEC countries" fell by a total of \$47 million. The increase in total exports was attributable to Japan (up 9.5%), "other OECD countries" (up 37%) and "other countries" (up 19.1%).

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

LATEST MONTHLY STATISTICS

EMPLOYMENT, INCOME

		Previous Month	% Change From Year Ago
Average Weekly Earnings(\$)	Sept. 423.02	420.08	3.4
Labour Income (\$ million)	Sept. 21,393.7	21,089.6	7.2
Persons with Jobs (million)	Nov.* 11.43	11.48	3.4
Unemployed	Nov.* 1,246,000	1,200,000	-8.0

INVENTORIES

Department Store (\$ million)	Sept. 3,392.8	3,481.8	2.1
Manufacturers' Owned (\$ million)	Sept. 34,072.5	34,132.2	3.7

ORDERS

Manufacturers' New Orders (\$ million)	Sept. 20,928.1	20,249.2	11.9
Manufacturers' Unfilled Orders (\$ million)	Sept. 22,565.5	22,764.5	3.1

PRICES

Consumer Price Index (1981 = 100)	Oct. 128.4	128.0	4.2
New House Price Index (1981 = 100)	Oct. 97.3	96.9	2.6
Raw Materials Price Index (1977 = 100)	Oct. 217.4	215.5	2.2
Excl. coal, crude oil, nat. gas	Oct. 155.2	152.5	0.0
Industry Selling Price Index (1971 = 100)	Oct. 320.2	319.4	2.5

CONSTRUCTION

Building Permits (\$ million)	Sept.* 1,711.9	14,259.9	24.9
Housing Starts - Urban Centres (units)	Oct. 13,697	112,740	20.7

ENERGY

Coal Production (thousand tonnes)	Sept. 4 780	45 290	8.6
Electricity Generation (gigawatt hours)	Sept. 33 065	325 746	4.8
Natural Gas Production (million cubic metres)	Aug. 6 430	62 238	8.5
Petroleum Refining (thousand cubic metres)	Sept. 6 790	59 184	-4.8

FOREIGN TRADE

Exports - Balance of Payments Basis (\$ million)	Oct.* 11,146	99,456	6.9
Imports - Balance of Payments Basis (\$ million)	Oct.* 9,126	84,987	10.6

PRODUCTION

Railway Carloadings (million tonnes)	Oct. 22.8	199.4	-0.9
Steel (ingots - thousand tonnes)	Oct. 1 280	12 109	-1.3

SALES

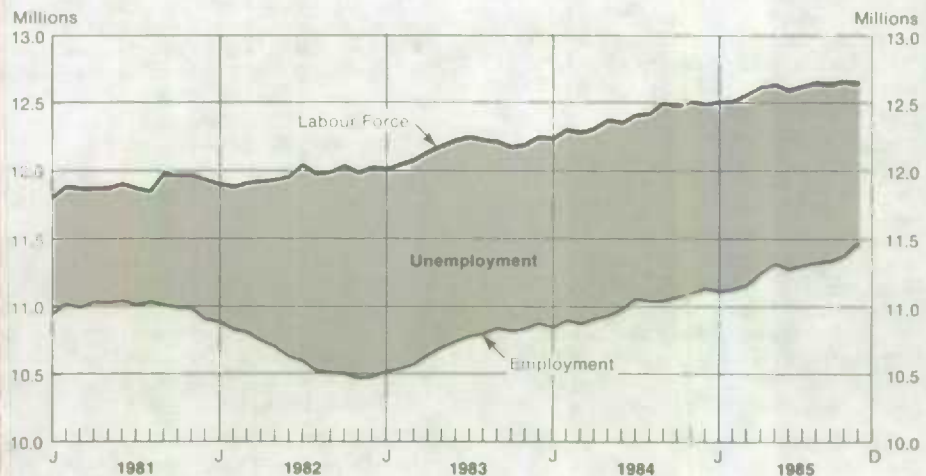
Department Store Sales (\$ million)	Oct.* 1,032.3	8,861.1	5.3
Manufacturers' Shipments (\$ million)	Sept. 21,138.1	179,799.7	6.9
New Motor Vehicle Sales (\$ million)	Oct.* 1,884.2	16,740.4	25.5
Retail Sales (\$ million)	Sept. 10,305.9	92,223.7	10.2

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

The Labour Force

Employment

The seasonally adjusted estimate of employment for the week ending November 16, 1985 was 11,469,000, an increase of 83,000 over the previous month. Nationally there was an estimated 50,000 increase among males and 26,000 among females in the 25 and over age group bringing their overall level of employment to 9,070,000.

Full-time employment rose to 9,694,000, an increase of 74,000 mostly attributed to gains among males (63,000). Part-time employment rose by 10,000 (7,000 among males) to 1,778,000.

Unemployment

The estimated seasonally adjusted level of unemployment remained at 1,305,000 in November 1985. Unemployment levels were stable for both the 15 to 24 age group (465,000) and for those aged 25 and over (840,000).

Unemployment Rate

The seasonally adjusted unemployment rate declined by 0.1 to 10.2 in November 1985. The unemployment rate was estimated at 16.2 for those aged 15 to 24, down by 0.1, while it remained at 8.5 among the 25 and over age group. The unemployment rate for males decreased by 0.2 to 10.0 while it reached 10.5 among females, up 0.2.

The unemployment rate rose by 2.0 to 15.3 in Prince Edward Island, by 0.4 to 13.5 in Nova Scotia, by 0.2 to 15.2 in New Brunswick, by 0.4 to 7.6 in Manitoba, by 0.1 to 9.6 in Alberta and by 0.3 to 14.5 in British Columbia. It declined by 0.5 to 7.4 in Ontario and remained at 19.6 in Newfoundland, 11.8 in Quebec and 7.9 in Saskatchewan.

Participation Rate

The seasonally adjusted participation rate was estimated at 65.7, up by 0.4. It increased by 0.3 to 68.0 among those aged 15 to 24, with the gain of 0.5 among young males accounting for all of the increase. The increase of 0.4 in the participation rate for those aged 25 and over to 65.0, was equally attributed to gains for both males and females.

Employment/Population Ratio

The seasonally adjusted employment/population ratio rose by 0.4 to 59.0 in November 1985. It increased by 0.3 to 57.0 among those aged 15 to 24 and by 0.4 to 59.5 for the 25 and over age group. The ratio rose by 0.6 for young males and by 0.5 for those 25 years and over. It declined by 0.2 among females aged 15 to 24 and increased by 0.2 for the older age group.

Unadjusted Data

The unadjusted estimate of employment for November 1985 was 11,427,000, an increase of 379,000 (3.4%) over the level of the previous year. The level of unemployment was 1,246,000, 109,000 (-8.0%) less than a year ago. The unemployment rate was 9.8 in November 1985, 1.1 below the level of last year. The participation rate was 65.2, 0.7 above the rate of November 1984. The employment/population ratio was 58.7, 1.3 higher than the ratio of last year.

Order the November 1985 issue of **The Labour Force** (71-001, \$20/\$200), or contact Ken Bennett (613-990-9448).

Infomat

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New Housing Price Index

The New Housing Price Index (1981=100) for Canada stood at 97.3 in October 1985, up 0.4% from its September level of 96.9. This index of Canadian housing contractors' selling prices now stands 2.6% higher than the year-earlier level of 94.8. An upward trend has been evident over the last four months. Between September 1985 and October 1985, the estimated house only index increased 0.6% to 100.1, while the estimated land only index increased 0.2% to 93.1.

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

Household Facilities and Equipment

Although piped gas remains the number one primary heating fuel in Canadian homes (used by 44.3% of homes), electricity has continued to increase in usage, surpassing oil in 1985 as the second most frequently used fuel. The proportion of households depending primarily on oil in 1985 is 21.9%; electricity is now used by 28.2%.

Other highlights of the survey are:

- The established trend towards households with fewer persons but more rooms is continuing. In 1985, average household size is 2.77 persons, slightly smaller than the 2.80 measured in 1984.
- The proportion of owners without a mortgage increased to 53.7% in 1985 from 50.3% in 1984.
- Microwave ovens are used in 22.9% of households in 1985, up from 16.1% in 1984.
- For the second year in a row, the proportion of homes with video cassette recorders (VCRs) has almost doubled to 23.4% in 1985, from 12.5% in 1984 and 6.4% in 1983.

Order the May 1985 issue of **Household Facilities and Equipment** (64-202, \$20), or contact Cindy Veness (613-990-9775).

Farm Cash Receipts

Farm cash receipts for the period January - October 1985 were at an estimated level of \$16,469.0 million, down 1.8% from the January - October 1984 estimate of \$16,770.8 million.

Receipts from the sale of field crops were estimated at \$7,879.6 million, a decrease of 4.1% from last year's estimate of \$8,214.4 million. Large declines in wheat (-28.7%) and barley (-24.7%) receipts were only partially offset by interim Western Grain Stabilization payments totalling \$449.7 million (made in April 1985) and higher crop insurance and Canadian Wheat Board participation payments. January - October 1985 deliveries were down 30.4% for barley and 26.1% for wheat - higher barley prices partially offset the lower sales.

Cash receipts from the sale of livestock and livestock products at \$8,004.8 million remained essentially unchanged when compared with the same period one year ago. Hog sales were up 3.0% over the period, however, prices for hogs were 7.1% lower than last year and as a result, hog cash receipts decreased 4.2%.

Order the January - October 1985 issue of **Farm Cash Receipts** (21-001, \$7/\$70), or contact Steven Danford (613-990-8706), Agriculture and Natural Resources Division.

Farm Net Income

Canadian farmers' realized net farm income in 1984 is estimated at \$4.334 billion, up 29% from the revised 1983 level of \$3.370 billion. Total net income, which takes into account the value of inventory changes, increased 26% to \$3.384 billion in 1984.

Total farm cash receipts (including supplementary payments) increased 8.3% to \$20.316 billion in 1984.

Cash receipts from crops rose 6.6% to \$9.811 billion in 1984. Canola receipts, crop insurance payments and western grain stabilization payments increased in 1984. Receipts decreased for barley and, to a lesser extent, for corn and soybeans.

Cash receipts from livestock products increased 8.0% to \$9.768 billion. All major livestock receipt categories increased.

Order **Farm Net Income** (21-202, \$32), or contact Peter Lys (613-990-8706).

Department Store Sales

Department stores in Canada reported sales totalling \$1,032.3 million in October 1985, an increase of 7.9% from a year earlier.

Cumulative sales for the period January to October 1985 totalled \$8,861.1 million, up 5.3% from the same period in 1984.

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

- Atlantic Provinces, \$75.0 million (+7.1%);
- Quebec, \$200.5 million (+10.0%);
- Ontario, \$387.1 million (+11.6%);
- Manitoba, \$50.3 million (+1.4%);
- Saskatchewan, \$30.5 million (+1.2%);
- Alberta, \$135.3 million (+6.8%);
- British Columbia, \$153.4 million (+3.6%).

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

Building Permits

The seasonally adjusted value of building permits issued by Canadian municipalities in September totalled \$1,816.7 million, down 2.1% from \$1,855.7 million in August. A substantial drop recorded in the non-residential sector more than offset the increase in the residential sector.

For a second consecutive month, the seasonally adjusted value of residential building permits exceeded one billion dollars in September, totalling \$1,116.2 million, up 2.7% from the previous month. Both the single-family dwelling and multi-family dwelling sectors remained particularly strong.

On a seasonally adjusted basis, 18,422 units were authorized in September (10,321 single detached and 8,101 multiple dwellings), up 0.4% from the 18,352 units approved in August (10,517 single detached and 7,835 multiple dwellings). Translated into annual terms, these approvals represented 221,100 units in September and 220,200 units in August. Decreases were registered in September in only the Atlantic provinces and British Columbia.

The seasonally adjusted value of non-residential projects in September dropped 8.9% to \$700.5 million. This sharp decline was due to the limited number of permits issued for major projects (\$10 million and over) in September. A significant decrease in the industrial sector (-47.9%) was entirely responsible for the non-residential decrease. The commercial sector (-0.9%) was virtually unchanged while the public sector (+9.2%) increased moderately. Decreases in September were recorded in all regions except Ontario.

Order the September 1985 issue of **Building Permits** (64-001, \$20/\$200), or contact G. Lemay (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 122.0 in October, up 0.3% from the September level of 121.6. This index now stands 5.4% higher than the year-ago level of 116.8.

Non-residential

The construction building material price index (non-residential) rose to 120.7 in October, up 0.3% from its revised September level of 120.3. This index of non-residential building material prices now stands 3.9% higher than its year-ago level of 116.2.

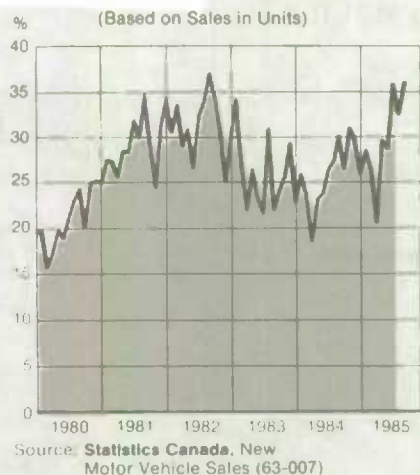
Order the fourth quarter 1985 issue of **Construction Price Statistics** (62-007, \$15/\$60), or contact Don DeGenova (613-990-9601), Prices Division.

Coal Statistics

Canadian production of coal totalled 4 780 kilotonnes in September 1985, down 1.7% from the 4 865 kilotonnes of coal produced a year earlier. Exports of coal decreased 12.2% to 1 915 kilotonnes from 2 181 kilotonnes while imports of 1 965 kilotonnes were reported.

Order the September 1985 issue of **Coal and Coke Statistics** (45-002, \$8/\$80), or contact Dave Madsen (613-990-9823), Energy Section, Industry Division.

Share of Canadian New Car Market Held by Overseas Manufacturers



International Travel

During October 1985, preliminary statistics indicate an estimated 2.5 million visits to Canada by United States residents, an increase of 4.8% from the same month in 1984. Visits by residents of other countries declined by 1.0% to 120,600 in October. The number of Canadian re-entries following visits to the United States totalled 2.9 million, up 3.1% from October 1984 figures. Visits by Canadian residents returning from all other countries increased by 11.6% to 158,300.

Estimation of Tourists

Preliminary data show that long-term tourist entries (by auto and bus for one night or longer and all entries by boat, plane and train) from the United States increased by 8.0% to 798,900 in October 1985, the highest October level in a decade. Canadian tourist re-entries from the United States numbered 791,200 in October, down 0.2%.

Order the October 1985 issue of **International Travel - Advance Information** (66-001P, \$5/\$50), or contact Paul L. Paradis (613-990-8933), International Travel Section.

Population for Canada

Postcensal estimates of population for Canada, provinces and territories as of October 1, 1985 are as follows:

• Canada	25,444,900
• Newfoundland	581,100
• Prince Edward Island	127,700
• Nova Scotia	883,400
• New Brunswick	719,400
• Quebec	6,597,700
• Ontario	9,111,100
• Manitoba	1,072,400
• Saskatchewan	1,020,100
• Alberta	2,357,600
• British Columbia	2,900,400
• Yukon	22,800
• Northwest Territories	51,200

Order **Quarterly Estimates of Population for Canada, the Provinces and the Territories** (91-001, \$6/\$24), or contact Lise Champagne (613-990-9579), Demography Division.

New Motor Vehicle Sales

Unadjusted Sales

Sales of all new motor vehicles totalled 141,971 units in October 1985, up 14.2% or 17,670 units over October 1984. The principal factors accounting for this year-over-year increase were the sales of passenger cars built overseas, which reached 38,383 units, an increase of 58.0% over October 1984, and the sales of overseas manufactured commercial vehicles, which totalled 4,632 units, up 33.2% over this same period. On the other hand, sales of passenger cars built in North America increased only 0.5% over October 1984 to a level of 68,044 units, while sales of domestically manufactured commercial vehicles rose by 7.3% to 30,912 units.

The 58.0% year-over-year rise in sales for overseas-built passenger cars comprised increases of 37.0% for Japanese manufactured automobiles (to 24,121 units) and 113.3% for passenger cars imported from other countries (to 14,262 units).

The share of the Canadian passenger car market held by North American manufacturers in October 1985 (based on unit sales) was 63.9%, sharply down from the 73.6% recorded in October 1984. Japanese manufacturers held a market share of 22.7% compared to 19.1% the previous year. Manufacturers from other countries held 13.4% of the passenger car market, a substantial increase from the 7.3% registered in October 1984.

The total dollar value of all new motor vehicles sold in October 1985 increased by 23.0% from a year earlier to \$1,884.2 million. Sales of overseas passenger cars reached \$457.1 million, up 59.1% over the corresponding month in 1984. The total sales of commercial vehicles built overseas amounted to \$52.7 million, up 44.8%. Sales of North American passenger cars rose 9.5% to \$839.5 million while sales of commercial vehicles increased 21.0% to reach \$534.8 million.

All provinces, with the exception of Nova Scotia (-0.2%), Saskatchewan (-4.3%) and Prince Edward Island (-20.0%), registered higher unit sales of motor vehicles in October 1985 compared to October 1984. The increases ranged from 1.1% in New Brunswick to 24.8% in British Columbia.

Total sales in units reported for the first 10 months of 1985 increased 18.1% over the same period last year to reach 1,300,102 units, valued at \$16,740.4 million, a gain of 25.5%.

Order the October 1985 issue of **New Motor Vehicle Sales** (63-007, \$8/\$80), or contact Lina Di Pietro (613-990-9824), Retail Trade Section, Industry Division.

Railway Carloadings

Revenue freight loaded by railways in Canada totalled 22.8 million tonnes in October 1985, an increase of 0.7% from the previous year. Carriers received an additional 1.1 million tonnes from the United States, a decrease of 2.0% from October 1984.

The total loadings in Canada for the year to date showed a decrease of 0.9% from the 1984 period, while receipts from United States connections decreased by 5.7%.

Order the October 1985 issue of **Railway Carloadings** (52-001, \$7.50/\$75).



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Stocks of Frozen Meat Products, November 1985	32-012	\$10/\$100	\$11/\$110
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Aviation Statistics Centre, Service Bulletin, Vol. 17, no. 10 November 1985	51-004	\$8.50/\$85	\$9.50/\$95
International Seaborne Shipping Statistics, 1984	54-209	\$74	\$75.50
Railway Carloadings, 7-day Period Ending November 21, 1985	52-005	\$75	\$100
Railway Operating Statistics, May 1985	52-003	\$9.50/\$95	\$10.50/\$105
Surface and Marine Transport, Service Bulletin, Vol. 1, no. 4	50-002	\$7.50/\$75	\$8.50/\$85

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