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Weekly Bulletin



December 20, 1985

## Building Construction Activity

The leading indicator of building construction activity in Canada (1981=100) advanced 1.3% in August to 93.0 from 91.8 in July. For a second consecutive month the increase was underpinned by the residential sector, while the non-residential sector remained virtually unchanged.

The filtered index of residential construction continued to advance, but at a slower pace. In August this index reached 103.3, up 2.1% from July. Both the single, and to a lesser extent, multi-family dwelling sectors were responsible for this moderate rise. The trend-cycle of residential permits issued was up in all Canadian regions.

The filtered index of non-residential construction (excluding engineering projects) edged up to 82.1 in August from the level of 82.0 for the two preceding months. The industrial index, which declined in July, was up 5.1% in August to 81.8. The trend-cycle of non-residential permits issued increased in all regions except in British Columbia.

Order the September 1985 issue of **Building Permits** (64-001, \$20/\$200), or contact Lizette Gervais-Simard (613-990-9689), Science, Technology and Capital Stock Division.

## Consumer Price Index

### National Highlights

The Consumer Price Index (CPI) for Canada (1981=100) rose 0.4% between October and November to a level of 128.9. There were increases in all seven major components with a 1.1% rise in the transportation index and a 0.5% increase in the food index explaining most of the overall upward movement.

The year-to-year increase in the CPI, as measured by comparing the index level for November 1985 to that of November 1984, was 4.0%, down slightly from the 4.2% registered in the 12-month period ending in October and continuing the long term trend of year-to-year increases in the 4% range.

After three consecutive months of declines, the food index rose by 0.5% in November as the food purchased from stores index was up 0.6% and the food purchased from restaurants index rose 0.2%. The largest contribution to the overall increase in food prices came from a 13.8% rise in the fresh vegetables index as seasonal switches were made to imported sources, particularly for green and salad-type vegetables. Another major upward force was the 2.3%

(continued on page 2, col. 1)

## LATEST MONTHLY STATISTICS

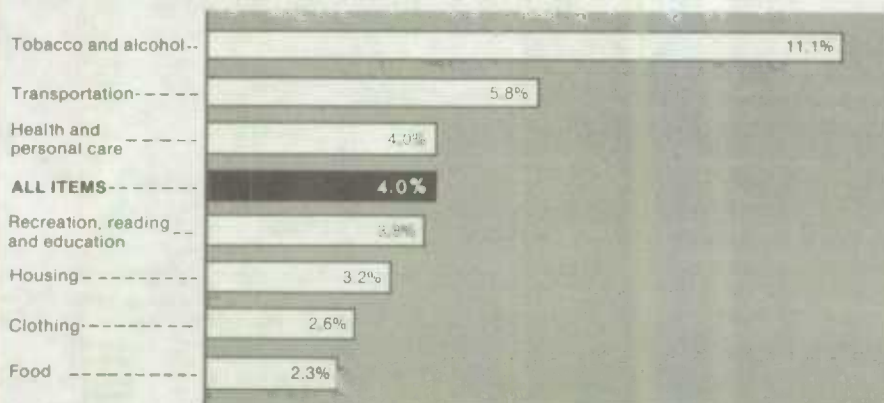
			Previous Month	% Change From Year Ago
<b>EMPLOYMENT, INCOME</b>				
Average Weekly Earnings(\$)	Sept.	423.02	420.08	3.4
Labour Income (\$ million)	Sept.	21,393.7	21,089.6	7.2
Persons with Jobs (million)	Nov.	11.43	11.48	3.4
Unemployed	Nov.	1,246,000	1,200,000	-8.0
<b>INVENTORIES</b>				
Department Store (\$ million)	Oct.*	4,288.7	3,392.8	10.9
Manufacturers' Owned (\$ million)	Oct.*	34,105.5	34,109.8	3.0
<b>ORDERS</b>				
Manufacturers' New Orders (\$ million)	Oct.*	21,799.1	20,990.8	7.0
Manufacturers' Unfilled Orders (\$ million)	Oct.*	22,384.1	22,575.5	1.1
<b>PRICES</b>				
Consumer Price Index (1981=100)	Nov.*	128.9	128.4	4.0
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
<b>CONSTRUCTION</b>				
Building Permits (\$ million)	Sept.	1,711.9	14,259.9	24.9
Housing Starts - Urban Centres (units)	Oct.	13,697	112,740	20.7
<b>ENERGY</b>				
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)	Oct.*	7 287	70 985	-2.3
<b>FOREIGN TRADE</b>				
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
<b>PRODUCTION</b>				
Railway Carloadings (million tonnes)	Oct.	22.8	199.4	-0.9
Steel (ingots - thousand tonnes)	Oct.	1 280	12 109	-1.3
<b>SALES</b>				
Department Store Sales (\$ million)	Oct.	1,032.3	8,861.1	5.3
Manufacturers' Shipments (\$ million)	Oct.*	21,990.5	201,843.0	7.2
New Motor Vehicle Sales (\$ million)	Oct.	1,884.2	16,740.4	25.5
Retail Sales (\$ million)	Oct.*	11,101.6	103,301.0	10.4

Statistics are in current dollars and are not seasonally adjusted.

\* - new this week.

## Percentage Change in the Consumer Price Index and its Major Components

November 1984 to November 1985



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

Canada



## ... Consumer Price Index

increase in meat prices as beef and pork both increased 2.5% and poultry rose 4.2%, the latter due to reduced numbers of promotions and sales in preparation for the holiday season. The main moderating factor in the food index was a 8.5% decline in the fresh fruit index.

The index for food purchased from stores stood 1.6% above its level for November 1984, while the index for food purchased from restaurants was 4.3% higher than a year ago. The resulting year-to-year increase in the aggregate food index was 2.3%, up from the 1.8% recorded in October, but showing the continued moderating influence that food prices have had on the overall index the past year.

The 0.4% increase in the all-items excluding food index was mainly attributable to the 1.1% increase in the transportation index, which resulted from a rise of 1.7% in automobile purchase prices after adjustment for quality changes as the new models were introduced, as well as a 1.3% increase in gasoline prices and a 1.7% rise in automobile insurance premiums. The public transportation index, which rose only 0.1% in November, had a slight dampening effect on the overall transportation index. Another notable influence on the rise in the all-items excluding food index was an increase of 0.5% in the tobacco products and alcoholic beverages index, as alcohol prices rose 0.9% due to increased mark-ups imposed in the recent Ontario government budget (effective November 12) and higher brewery prices in Manitoba and Alberta, and stronger European currency exchange rates affecting the prices of imported wines in a number of provinces. The housing index was up 0.1% as small increases in the shelter and the household furnishings and equipment components were even further dampened by no overall change in the household operations component where a 0.8% decline in charges for postage services was noted due to the start of special Christmas rates. The clothing index was up 0.3% reflecting increased costs of clothing services and some returns to regular prices partly offset by sales and promotions on other items. The health and personal care index rose 0.5% as the cost of personal care services such as hair cutting, washing and setting increased. The recreation, reading and education index advanced marginally (0.1%).

Between November 1984 and November 1985, the all-items excluding food index rose 4.4%, down from the 4.7% recorded in the 12-month period ending in October.

Viewed in terms of goods and services, the index for goods increased 0.5%, while that for services rose 0.3%. Since November 1984, the price level for goods rose 3.5% and that for services was up 4.3%.

On a seasonally adjusted basis, the all-items index rose by 0.5% between October and November. The food index increased by 0.7%, while the all-items excluding food index advanced by 0.4%. During the three-month period August to November, the seasonally-adjusted all-items index rose at a compounded annual rate of 3.5%.

Order the November 1985 issue of **The Consumer Price Index** (62-001, \$8/\$80), or contact Sandra Shadlock (613-990-9606), Prices Division.

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## Weekly Bulletin

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## Security Transactions

Foreign investment in outstanding Canadian securities resulted in a net capital inflow of \$398 million in October, double the net investment recorded in September. Non-residents were net buyers of Canadian equities in October, recording a net investment of \$156 million. This contrasted with a small net disinvestment in August and September. Foreign investment in outstanding Canadian bonds amounted to \$242 million, representing, to a large extent, investments in provincial issues.

Canadian residents increased their holdings of foreign securities by \$305 million in October, following a net disinvestment of \$287 million in September. Net purchases of foreign bonds, mainly United States government issues, amounted to \$355 million, while residents reduced their investment in foreign equities by \$51 million.

Order the October 1985 issue of **Security Transactions with Non-residents** (67-002, \$15/\$150), or contact J. Motala (613-990-9052), Balance of Payments, International and Financial Economics Division.

## Help-wanted Index

The seasonally adjusted Help-wanted Index (1981=100) for Canada increased 7.4% to 87 from 81 between October and November 1985. By region, the index advanced 32.3% in the Atlantic provinces (to 213 from 161), 2.1% in Ontario (to 98 from 96) and 14.3% in British Columbia (to 40 from 35). It declined 9.1% in the Prairie provinces (to 40 from 44) and 1.1% in Quebec (to 87 from 88).

Comparing November 1985 with the same month last year, the indexes advanced in all regions. The increases ranged from 8.1% in the Prairie provinces to 166.3% in the Atlantic provinces.

Order the November 1985 issue of **Help-wanted Index** (71-003, \$2.50/\$25), or contact Horst Stiebert (613-990-9900), Labour Division.

## Canadian Composite Leading Indicator

The leading indicator posted its fourth straight increase in September, up 1.3%, following a 1.0% rise in August.

Renewed growth in the indicators of personal spending, coupled with the continuing resurgence of housing demand, accounted for the largest part of the advance of the composite index in September. The second most important contributor to this growth was the proxy of profit margins – the last of the 10 components to turn up following the recent slump of the composite index.

These large gains were partly offset by a slowdown of demand in September for manufacturers of durable goods.

The non-filtered index maintained its upward trend, reinforcing the short-term outlook for continued growth in output.

Order the monthly **Current Economic Indicators** (13-005, \$10/\$100), or contact G. Proulx (613-990-9163).

## Refined Petroleum Products

Preliminary figures show that in October 1985, sales of refined petroleum products in Canada amounted to 6 838 100 cubic metres, down 1.6% from a year earlier. Cumulative figures for the first 10 months of 1985 show sales of petroleum products were down 1.1% from the 1984 level.

Sales of the main products in October, with the percentage change from 1984 in brackets, were as follows: motor gasoline, 2 852 300 cubic metres (2.0%); kerosene stove oil, 1 013 300 cubic metres (+12.3%); diesel fuel, 1 467 800 cubic metres (+4.4%); light fuel oil, 438 900 cubic metres (16.9%) and heavy fuel oil, 450 900 cubic metres (-22.3%).

Production of petroleum products by Canadian refiners amounted to 7 287 138 cubic metres, up 4.9% from October 1984.

For the first 10 months of 1985, sales of refined petroleum products amounted to 64 414 157 cubic metres. Year-to-date sales of the main products with the percentage change from 1984 in brackets, were as follows: motor gasoline, 27 369 028 cubic metres (-0.6%); kerosene stove oil, 667 385 cubic metres (+1.5%); diesel fuel, 12 609 552 cubic metres (+1.8%); light fuel oil, 5 631 467 cubic metres (-8.7%) and heavy fuel oil, 4 596 838 cubic metres (-22.8%).

Year-to-date production of petroleum products by Canadian refiners amounted to 70 984 508 cubic metres, down 2.3% from the same period in 1984.

Order the October 1985 issue of **Refined Petroleum Products** (45-004, \$15/\$150), or contact Gérard O'Connor (613-991-3562), Energy Section, Industry Division.

## Canadian Coal Production

Estimates of Canadian coal production for 1985 indicate that new records both for value and quantity will be set.

Value is estimated to reach almost \$1.3 billion, up 5.0% from 1984.

Production is expected to total 80.6 million tonnes, an increase of 6.0% from a year earlier.

Contact Dave Madsen (613-991-3565).



## Department Store Sales and Stocks

Department stores in Canada reported unadjusted sales totalling \$1,032.3 million in October 1985, up 7.9% from the October 1984 level. Sales were higher in 31 of the 40 departments, with the largest increases reported in furniture (+22.5%), floor coverings (+20.3%) and women's and misses' sportswear (+20.2%). The most notable decreases were recorded for china and glassware (-9.7%), piece goods (-6.6%) and smallwares and notions (-4.4%).

Sales increased in all provinces between October 1984 and October 1985 with gains ranging from 1.2% in Saskatchewan to 12.0% in Prince Edward Island. Sales also rose in all 10 metropolitan areas surveyed, with increases ranging from 1.2% in Winnipeg to 14.5% in Toronto.

Sales by major department stores in October 1985 reached \$645.6 million, up 5.6% from the corresponding month a year earlier, while junior department stores had sales of \$386.6 million, up 11.9% over the same period last year.

In October 1985, total department store sales constituted 9.3% of all retail sales in Canada, a slight decrease from the 9.6% share held in October 1984.

### Stocks

The unadjusted selling value of inventories held by department stores in October 1985 was \$4,288.7 million, up 10.9% from October 1984. Seasonally adjusted department store stocks totalled \$3,658.5 million, up 5.2% from the September 1985 revised value of \$3,478.9 million.

Order the October 1985 issue of *Department Store Sales and Stocks* (63-002, \$13/\$130), or contact Lina Di Piéto (613-991-3551).

## Union Wage Rate Index

The Canada total Union Wage Rate Index (1981=100) for construction trades (including supplements) registered no change between October and November 1985, remaining at a level of 132.1.

The Halifax index rose 0.3%, the result of pay increments to three trades. However, the small weights attributable to these trades did not cause the Canada total index to move.

Comparing November 1985 with the same month in 1984, the Canada total level rose 3.4%. At a city level, the largest increase was reported in Halifax (10.1%). Cities in Quebec, Ontario and British Columbia increased 4.4% on average. Saint John advanced 2.6%, Winnipeg rose 2.0%, while in Newfoundland and Alberta, indexes increased less than 1%. A decline was registered in Saskatchewan (-0.5%).

Order the fourth quarter issue of *Construction Price Statistics* (62-007, \$15/\$60).

## Steel Ingots

Steel ingot production for October 1985 totalled 1 295 907 tonnes, an increase of 4.0% compared to the 1 246 523 tonnes produced the previous year.

Order the October 1985 issue of *Primary Iron and Steel* (41-001, \$4/\$40), or contact G.W. Barrett (613-991-3515).

## Retail Trade

### Unadjusted Sales:

Preliminary estimates of total retail trade for October 1985 indicate an increase of 11.4% over the same month last year, totalling \$11,101.6 million in current dollars (not adjusted for inflation). The most notable gains were registered by household appliance stores (+30.6%), used car dealers (+26.5%), motor vehicle dealers (+20.6%) and specialty shoe stores (+20.6%). The only decreases in sales were recorded by garages (7.9%), men's clothing stores (2.7%) and general stores (-0.8%).

All provinces and territories reported higher sales in October 1985 over the corresponding month in 1984. Gains ranged from 6.4% in Prince Edward Island to 16.7% in Nova Scotia. At the metropolitan area level, sales advanced in all cities for which data are published: Vancouver (10.5%); Montreal (11.5%); Winnipeg (13.3%) and Toronto (13.4%).

Cumulative retail sales for the first 10 months of 1985 totalled \$103,301.0 million, up 10.4% over the corresponding period in 1984. The most significant con-

tributing factor to this rise was the increase of 17.0% for the automotive group.

The revised retail sales estimates for September 1985 amounted to \$10,281.6 million, an increase of 10.1% over September 1984.

### Seasonally Adjusted Sales:

Adjusted for seasonal fluctuations, holidays and the number of trading days, retail sales totalled \$10,945.7 million in current dollars in October 1985, an increase of 0.1% over the previous month's revised total of \$10,936.5 million. The largest sales increases were recorded by "all other food stores" (+4.4%), jewellery stores (+3.9%) and general stores (+3.0%). The largest decreases were reported by automotive parts and accessories stores (3.2%), sporting goods and accessories stores (2.5%) and motor vehicle dealers (2.0%).

Order the October 1985 issue of *Retail Trade* (63-005, \$14/\$140), or contact Lina Di Piéto, (613-991-3551), Retail Trade Section, Industry Division.

## Direct Selling in Canada

Direct sales to Canadian household consumers totalled \$2,437.7 million in 1984, an increase of 5.4% from the revised 1983 level of \$2,313.6 million.

Personal selling (such as sales at house parties) was the most popular method of direct sales at \$808.5 million or 33.2% of all 1984 direct sales. Other methods of sales were by mail (\$567.5 million or 23.3%); door-to-door (\$531.4 million or 21.8%); from manufacturing premises (\$378.9 million or 15.5%) and other methods (accounting for \$151.4 million or 6.2%).

The most popular groups of commodities sold by direct sellers were books, newspapers, and magazines (\$694.0 million) and food (\$572.9 million).

Order the 1984 issue of *Direct Selling in Canada* (63-218, \$15), or contact the Retail Trade Section, Industry Division, (613-990-9656).

## Capacity Utilization

Capacity utilization in Canadian manufacturing increased by 2.4% in the third quarter of 1985 to a level of 78.3% from 76.5% in the second quarter of 1985.

In this third quarter, higher capacity utilization rates were posted in 16 of the 19 industry groups. The most important increases were 8.7% in transportation equipment, 6.0% in knitting mills and clothing, 5.9% in leather, 5.3% in wood and 5.0% in furniture and fixtures. All other increases were less than 4%. Of the three industry groups whose rates declined, the decreases ranged from 1.3% to 0.3%.

Utilization rates in durable manufacturing industries increased by 2.9% in the third quarter of 1985 to 73.6% of capacity from 71.5% in the second quarter of 1985.

In the non-durable sector, capacity utilization increased 1.7% to 83.1% from 81.7%.

Contact D. Wallace or R. Landry (613-990-9684), Science, Technology and Capital Stock Division.

## Restaurants, Caterers and Taverns

Restaurant, caterer and tavern receipts totalled \$1,004.8 million for October 1985, an increase of 9.9% over the \$914.2 million reported for the same period last year.

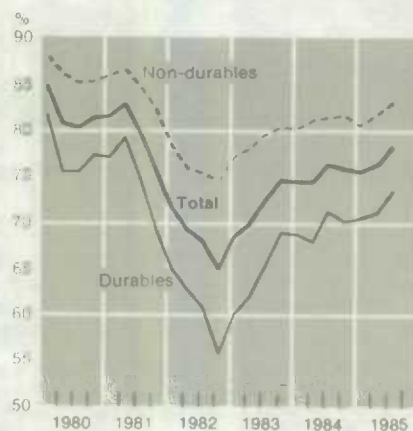
Order the October 1985 issue of *Restaurants, Caterers and Taverns* (63-011, \$5/\$50), or contact G. Blouin (613-991-3489), Services Division.

## Passenger Bus and Urban Transit Statistics

In October 1985, 67 Canadian urban transit systems collected 126,409,969 initial passenger fares. Operating revenues amounted to \$74,425,276.

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

## Capacity Utilization Rates in Canadian Manufacturing



Source: Statistics Canada, Capacity Utilization Rates in Canadian Manufacturing (31-003)



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Fruit and Vegetable Preservation - Raspberries, Service Bulletin, Vol. 14, No. 2, 1984 and 1985	32-023	\$6/\$100	\$7/\$110
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