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Weekly Bulletin

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Help-wanted Index

The seasonally adjusted Help-wanted Index (1981=100) for Canada increased to 64 from 60 between December 1984 and January 1985.

The index increased in all regions except for the Atlantic provinces where a decrease to 168 from 220 was recorded. The Help-wanted Index advanced to 68 from 63 in Quebec, to 71 from 66 in Ontario, to 37 from 34 in the Prairie provinces and to 28 from 22 in British Columbia.

The short term trend — a measure which smooths irregular monthly fluctuations — remained at the same level in January as registered in December.

Contact J.P. Maynard or Horst Stiebert (613-990-9900), Labour Division.

New Motor Vehicle Sales

Unadjusted Sales

December 1984 retail sales of all new motor vehicles (without seasonal adjustment) increased 12.1% compared to the same month last year to 83,143 units. This is the largest volume recorded for the month of December since 1976 when sales totalled 92,769 units. Sales of passenger cars manufactured in North America rose by 6.7% to 42,259 units, while 20,596 North American commercial vehicles were sold, a gain of 34.1% over the same month in 1983. Retail sales of passenger cars made overseas were 8.7% higher with 17,838 units sold, while sales of new commercial vehicles from the same origin declined by 12.6% to 2,450 units.

The market share held by North American and Japanese manufacturers in December 1984 decreased from their level recorded in December last year of 70.7% and 23.2% respectively, to 70.3% and 19.4%. Manufacturers from other countries took 10.3% of the Canadian market of new passenger car sales, a notable gain compared to the 6.1% share they held at the same time a year earlier.

The total dollar value of all new motor vehicles sold in December 1984 increased 19.4% from the previous year to \$1,072.6 million. North American passenger cars sold for \$488.5 million (up 9.8%) and sales of commercial vehicles built in North America totalled \$329.3 million (up 44.5%). Sales of passenger cars manufactured overseas

(continued page 2, col. 1)

LATEST MONTHLY STATISTICS

EMPLOYMENT, INCOME

Average Weekly Earnings (\$)	Nov.	410.76	408.25	4.1
Labour Income (\$ million)	Nov.	20,001.9	20,004.3	6.9
Persons with Jobs (million)	Jan.*	10.68	10.97	2.3
Unemployed	Jan.*	1,483,000	1,316,000	0.7

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)	Dec.	94.7	94.5	-0.1
Raw Materials Price Index (1977=100)	Dec.	221.9	221.7	4.5
Index: coal, crude oil, nat. gas	Dec.	156.5	156.4	1.4
Industry Selling Price Index (1971=100)	Dec.	313.9	313.4	3.6

CONSTRUCTION

Building Permits (\$ million)	Nov.	1,140.3	14,021.6	3.6
Housing Starts — Urban Centres (units)	Dec.	8,792	110,874	-17.4

ENERGY

Coal Production (thousand tonnes)	Nov.	5,212	52,355	29.3
Electricity Generation (terawatt hours)	Nov.	37.5	383.8	8.2
Natural Gas Production (million cubic metres)	Nov.	8,570	79,844	8.6
Petroleum Refining (million cubic metres)	Nov.	7.2	79.8	1.2

FOREIGN TRADE

Exports — Balance of Payments Basis (\$ million)	Dec.	8,999	112,510	23.9
Imports — Balance of Payments Basis (\$ million)	Dec.	6,905	91,679	25.4

PRODUCTION

Railway Carloadings (million tonnes)	Dec.	16.9	240.0	15.9
Steel (ingots — thousand tonnes)	Jan.*	1,152	1,152	6.1

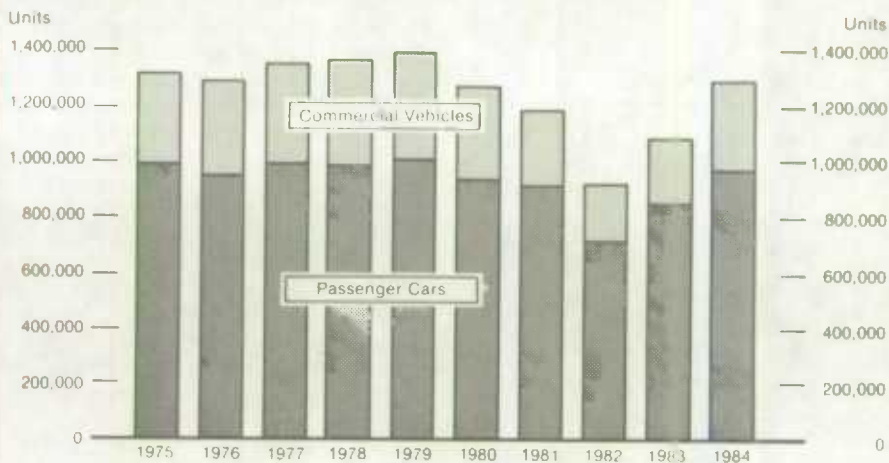
SALES

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)	Dec.*	1,072.6	15,679.8	28.6
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.

Canadian Sales of New Motor Vehicles



Source: Statistics Canada, New Motor Vehicle Sales (63-007)

Canada

New Motor Vehicle Sales

rose by 14.8% to \$226.8 million, while commercial vehicles were 0.3% higher at \$28.1 million.

Seasonally Adjusted Sales

Adjusted for seasonal fluctuations, holidays and the number of trading days, unit sales of passenger cars built in North America (62,273 units) increased 15.1% in December 1984 over November 1984. Seasonally adjusted sales of passenger cars made overseas (24,694 units) increased by 10.1% from the previous month, while total commercial vehicles (29,786 units) were 7.1% higher.

Annual Data

Total new motor vehicle sales for 1984 reached their highest level since 1979 (1,396,402 units) and totalled 1,283,502 units sold. Of this total, passenger cars and commercial vehicles manufactured in North America accounted for 724,932 and 273,604 units respectively, showing gains of 16.0% and 42.1% over the previous year. There were 246,278 passenger cars built overseas sold in Canada in 1984, 12.9% higher than a year earlier, while sales of commercial vehicles dropped by 14.3% to 38,688 units.

The retail value of these sales totalled \$15,679.8 million in current dollars and was 28.6% higher than last year. Passenger cars sales accounted for \$11,133.9 million (up 23.2%), while commercial vehicles sales contributed \$4,540.8 million (up 43.9%) to the total.

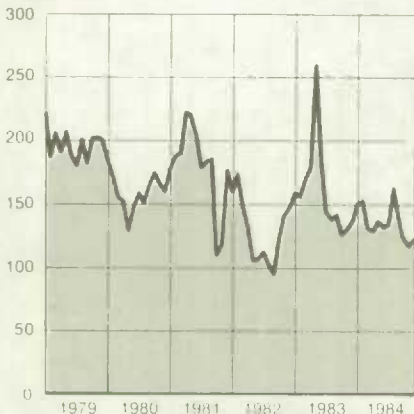
The market shares held in 1984 by manufacturers from North America and other countries increased from last year's shares of 74.1% and 5.0% to 74.7% and 7.7% respectively. Japanese manufacturers saw their share decline from 20.9% for 1983 to 17.6% in 1984.

Order the December 1984 issue of New Motor Vehicle Sales (63-007, \$2.75/\$27.50), or contact Jean-Pierre Simard (613-990-9665), Retail Trade Section, Merchandising and Services Division.

Housing Starts in Canada

Seasonally Adjusted at Annual Rates

Thousands



Source: Statistics Canada, Housing Starts and Completions

International Travel

Total Travellers

During December 1984, preliminary statistics show that an estimated 1.8 million United States residents entered Canada, an increase of 14.2% over December 1983. Visitors from other countries increased by 3.8% to 96,000. Canadian residents re-entering the country following visits to the United States totalled 2.5 million, down 0.8% from December 1983. Canadians returning from visits to all other countries increased by 6.4% to 122,000.

The international travel flows during 1984 were as follows:

- 33.0 million United States residents entered Canada, a 1.5% increase over 1983;
- visitors from other countries increased by 6.3% to 1.9 million;
- Canadians returning from the United States decreased by 5.6% to 36.8 million; and
- residents returning from other countries rose by 14.8% to 2.0 million.

Estimation of Tourists

On a year-to-date basis, tourists to Canada from the United States in 1984 increased by 4.1% to 11.7 million; tourists from other countries numbered 1.7 million, up 6.1% from last year. Canadian tourist re-entries from the United States numbered 11.0 million, down 8.3% from 1983, while residents returning from countries other than the United States increased by 14.8% to a record 2.0 million.

Order the December 1984 issue of International Travel — Advance Information (66-002, \$1.60/\$16), or contact Paul L. Paradis (613-990-8932), International Travel Section.

Business Conditions

Canadian manufacturers expect production during the first quarter of 1985 to be maintained at approximately the level observed in the last quarter of 1984. The January results show that respondents whose shipments represent 56% of total respondent's shipments forecast that output for the first three months of 1985 will remain at about the same level as that for the previous quarter. Respondents representing 22% of manufacturing output expect higher production; the remaining 22% are planning to reduce output.

Only manufacturers of intermediate goods (except construction) are optimistic about first quarter production. Manufacturers in the other categories forecast that output will be lower or about the same.

Respondents to the January survey reported little change in the level of new orders. Those representing 60% of manufacturing output reported that new orders have remained at about the same level. Only 21% indicated rising new orders while 19% reported declining new orders. The export-oriented industries indicated a sharp increase in new orders.

In the January survey, the backlog of unfilled orders was reported to be higher than normal by 16% of respondents, lower

The Labour Force

Estimates for January 1985 showed Canada's seasonally adjusted unemployment rate rose 0.3% to 11.2% from the revised December 1984 rate of 10.9%. The increase in the unemployment rate resulted from two factors: a slight decline in employment levels for women and an increase in labour force participation among men.

The seasonally adjusted participation rate was unchanged from the previous month, holding at 64.9%. There was, however, an increase of 0.5% in the participation rate among males to 76.9%, while the rate declined by 0.4% for females to 53.5%. The seasonally adjusted employment/population ratio fell by 0.2% to 57.7% in January.

Employment for the week ending January 19, 1985 was an estimated 11,117,000, a drop of 24,000 from December. Employment fell by 37,000 among people aged 15 to 24 to a level of 2,343,000. Levels of employment rose slightly for those aged 25 and older, reaching an estimated 8,774,000. Full-time employment levels decreased by an estimated 48,000 in January to 9,409,000. There was a slight increase in part-time employment, rising to 1,706,000.

Employment levels declined in the construction (-23,000) and trade (-26,000) sectors and increased in the agriculture sector (+25,000). There was little or no change in employment levels for the remaining industries. On a regional basis, employment declined by an estimated 6,000 in Newfoundland, by 4,000 in Nova Scotia and by 11,000 in Alberta. Little change was reported in the levels of the remaining provinces.

The seasonally adjusted level of unemployment for January 1985 rose by an estimated 44,000 to 1,400,000. Unemployment increased by 500,000 among those aged 15 to 24. The level of unemployment climbed by an estimated 33,000 among those aged 25 and older to 900,000.

Changes in the numbers of unemployed at the provincial level were relatively small, with the exception of Newfoundland, where the seasonally adjusted estimate increased by 4,000.

Order the January 1985 issue of The Labour Force (71-001, \$3.85/\$38.50), or contact Ken Bennett (613-990-9448), Labour Force Survey.

than normal by 27% and about normal by 58%. By comparison, in October 1984, 13% reported higher than normal backlog, 26% lower than normal and 62% about normal.

The level of finished product inventory was felt to be too high by 28%, too low by 3% and about right by 69%. In the October survey, 22% reported stocks of finished goods as too high, 7% too low and 72% about right.

In terms of production impediments, a shortage of working capital was noted by 5% and a shortage of raw materials was cited by 3%. However, 81% indicated no difficulties were being experienced.

Contact T. Newton (613-990-9832), Manufacturing and Primary Industries Division.

Trusted Pension Funds

During the third quarter of 1984, the book value of assets held in trusted pension funds increased by 2.8% to \$90.7 billion. This represents an increase of \$11.1 billion or 13.2% relative to the same quarter of 1983. This increase was distributed among the various types of assets, especially bond and stock holdings, which increased by 2.5% and 3.3% respectively during this quarter. Nearly 73% of the increase in the book value of the assets was absorbed by bonds and stocks; registering 45.9% and 25.9% respectively, these two investment vehicles represented the greatest part of the total assets. Mortgages maintained their proportion of the total at 7.3%.

Total income in the third quarter amounted to \$3.5 billion. These receipts came mainly from investment income which represented 52.4% of the total and from contributions which represented 42.5%. The remaining 5.5% were made up of net gains on sales of securities and items of miscellaneous income. These receipts aided, among other items, in financing the \$1,091 billion expenditures. Pension payments accounted for nearly 80% and cash withdrawals for 10.6% of total expenditures. The net cash flow amounted to \$2.4 billion, a slight decrease from the \$2.6 billion recorded during the second quarter.

Order the *Third Quarter 1984 issue of Quarterly Estimates of Trusted Pension Funds (74-001, \$2.75/\$11)*, or contact **Hubert Frenken (613-990-9900)**, Labour Division.

Farm Cash Receipts

Farm cash receipts for the period January-December 1984 are presently estimated at \$20,051.6 million, up 7.0% from 1983.

Receipts from the sale of field crops totalled \$9,656.9, 5.7% higher than last year. Cash receipts from the sale of livestock and livestock products were estimated at \$9,678.8 million, a 6.6% rise over 1983. Other receipts were up 37.1% to \$715.9 million from the previous year.

Order the *January-December 1984 issue of Farm Cash Receipts (21-001, \$1.60/\$16)* or contact **John Lanthier (613-990-8706)**, Agriculture Statistics Division.

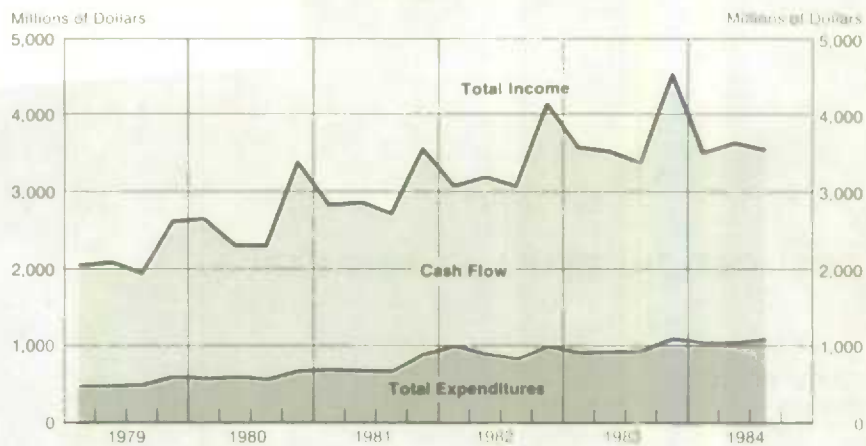
Farm Input Price Index

The preliminary Farm Input Price Index for Canada stood at 107.9 for the fourth quarter of 1984, down 0.9% from the revised third quarter level of 108.9. Between the fourth quarter of 1983 and that of 1984, the index rose by 3.6%.

The quarterly decrease was caused, in large part, by a decrease of 3.9% in the index for animal production and to a sharp decline of 15.4% in prices for weanling pigs. The crop production major component index also declined by 0.7%. Partially offsetting the impact of these declines were small increases which ranged from 0.3% for building and fencing to 1.6% for interest.

On a regional basis, the Farm Input Price Index for Eastern Canada declined 2.4% from the third quarter 1984. The animal pro-

Quarterly Estimates of Income and Expenditures of Trusted Pension Funds



Source: Statistics Canada, Quarterly Estimates of Trusted Pension Funds (74-001)

Security Transactions

Foreign investment in outstanding Canadian bonds in December produced a net capital inflow of \$260 million. This compared to the surge in investment activity recorded in the previous two months when non-residents were net buyers of more than \$1 billion of Canadian bonds in the secondary market. The net investment in the current month came principally from Continental Europe and Japan, and largely represented purchases of long maturity Government of Canada issues. The gross value of foreign trading activity in Canadian bonds was nearly halved to \$1.4 billion in December.

Trading with non-residents in outstanding Canadian equities resulted in a net capital outflow of \$76 million in December, up from a net outflow of \$12 million in November.

Residents of Canada increased their holdings of outstanding foreign securities by \$129 million in December, similar to the net investment recorded in November. In the current month, Canadian residents acquired \$90 million of outstanding foreign bonds, mainly United States Government issues, and \$39 million of foreign equities.

Order the *December 1984 issue of Security Transactions with Non-residents (67-002, \$2.75/\$27.50)*, or contact **John Motala (613-990-9051)**, International and Financial Economics Division.

duction index for Eastern Canada was down by 7.2%. Between the fourth quarter 1983 and the fourth quarter 1984, the total index increased by 3.2%.

In Western Canada, all the quarterly changes in the component indexes were relatively small with the total regional index rising by 0.2%. The animal production index declined by only 0.3%. Between the fourth quarters of 1983 and 1984, the Farm Input Price Index for Western Canada declined by 3.7%.

Order the *fourth quarter 1984 issue of Farm Input Price Indexes (62-004, \$4.40/\$17.60)*, or contact **Prices Division (613-990-9615)**.

Department Store Sales

Department stores in Canada reported sales totalling \$1,718.0 million in December, down 0.8% from a year earlier. Cumulative sales for January-December 1984 reached \$11,384.7 million, a 4.2% rise over the level recorded during the same period in 1983.

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

- Ontario, \$653.2 million (+0.2%);
- Quebec, \$312.2 million (+2.4%);
- British Columbia, \$259.0 million (-7.0%);
- Alberta, \$219.1 million (-3.0%);
- Atlantic provinces, \$135.2 million (+3.7%);
- Manitoba, \$85.9 million (+0.4%); and
- Saskatchewan, \$53.5 million (-0.6%).

Order the *December 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.

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PUBLICATIONS RELEASED FEBRUARY 8 — 14

	Cata- logue No.	In Canada: Price per issue/year	Elsewhere: Price per issue/year
CONSTRUCTION			
Housing starts and completions, November 1984	64-002	\$3.30/\$33	\$3.95/\$39.50
CURRENT ECONOMIC ANALYSIS			
Current economic analysis, November 1984	13-004E	\$2.75/\$27.50	\$3.30/\$33
EXTERNAL TRADE			
Imports by commodities, November 1984	65-007	\$5.55/\$55.50	\$6.65/\$66.50
LABOUR			
Employment, earnings and hours, September 1984	72-002	\$5.55/\$55.50	\$6.65/\$66.50
Employment, earnings and hours, October 1984	72-002	\$5.55/\$55.50	\$6.65/\$66.50
Statistical report on the operation of the Unemployment Insurance Act, July-September 1984	73-001	\$6.65/\$26.60	\$7.95/\$31.90
MANUFACTURING AND PRIMARY INDUSTRIES			
Corrugated boxes and wrappers, December 1984	36-004	\$1.60/\$16	\$1.90/\$19
Gypsum products, December 1984	44-003	\$1.60/\$16	\$1.90/\$19
Inventories shipments and orders in manufacturing industries, November 1984	31-001	\$3.85/\$38.50	\$4.60/\$45
Manufacturing industries of Canada: sub-provincial areas, 1981	31-209	\$22.25	\$26.70
Production and inventories of process cheese and instant skim milk powder, December 1984	32-024	\$1.60/\$16	\$1.90/\$19
Production, sales and stocks of major appliances, December 1984	43-010	\$1.60/\$16	\$1.90/\$19
Shipments of solid fuel burning heating products, Quarter ended December 31, 1984	25-002	\$2.75/\$11	\$3.30/\$13.20
Service Bulletin:			
Fruit and vegetable preservation , Vol. 13, No. 8, Pack of processed beans, green and wax, 1984	32-023	\$1.60/\$16	\$1.90/\$19
SCIENCE AND TECHNOLOGY			
Service Bulletin:			
Science statistics , Vol. 9, No. 1, The investment tax credit for research and development, 1978 to 1982	88-001	\$1.60/\$16	\$1.90/\$19
TRANSPORTATION AND COMMUNICATIONS			
Canadian civil aviation, 1982	51-206	\$6.65	\$7.95

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