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Weekly Bulletin

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## Industrial Corporations

According to fourth quarter 1984 preliminary survey results, seasonally adjusted pre-tax profits of industrial corporations in Canada rose 1.3% over the previous quarter to a level of \$9.2 billion. The current growth rate, although moderated from the 3.6%, 3.3% and 3.8% increases of the first three quarters of 1984, represents the tenth consecutive quarter that seasonally adjusted pre-tax profits have improved. The current profit figure is now very close to the \$9.3 billion record level set in first quarter 1980.

The energy sector, particularly the petroleum and coal and pipelines industries, posted the largest quarterly pre-tax profit increases, rising \$118 million and \$82 million respectively. Profits in the paper industry and the transportation equipment industry, areas of strength in earlier 1984 quarters, were flat in fourth quarter 1984. In all, exactly one-half of the 44 industries reflected quarterly increases in seasonally adjusted profits.

(continued page 2, col. 1)

## Construction Activity

The leading indicator of construction activity in Canada (1971=100) was almost unchanged in October (91.7), recording a slight increase of 0.1% from the preceding month. The levelling-off of the total index is the result of a downward trend in the residential sector and an upward movement in the non-residential sector.

The leading indicator of residential construction continued to decline in October, slipping 1.2% to 89.4. The retreat of the residential construction index is attributable to the weakening of intentions which extended to both single and multi-family sectors.

The filtered index of non-residential construction moved up 2.0% in October to 94.0. The upward trend in this sector was primarily supported in October by a strong increase of intentions recorded in the industrial (+5.5%) sector. Meanwhile, more moderate gains were made by the commercial (+0.7%) and governmental (+0.8%) components. Compared to the same month last year, the non-residential intentions were strongest, showing a rise of 17.6%.

Order the November 1984 issue of Building Permits (64-001, \$3.85/\$38.50), or contact Lizette Gervais-Simard (613-990-9689), Construction Division.

## LATEST MONTHLY STATISTICS

### EMPLOYMENT, INCOME

			Previous Month	% Change From Year Ago
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)	Dec.*	3,142.7	3,950.5	-2.5
Manufacturers' Owned (\$ million)	Dec.*	33,195.8	32,770.3	8.3

### ORDERS

Manufacturers' New Orders (\$ million)	Dec.*	17,830.2	19,827.3	8.7
Manufacturers' Unfilled Orders (\$ million)	Dec.*	22,110.3	22,210.4	10.0

### PRICES

Consumer Price Index (1981=100)	Jan.*	124.6	124.1	3.7
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
Excl. 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

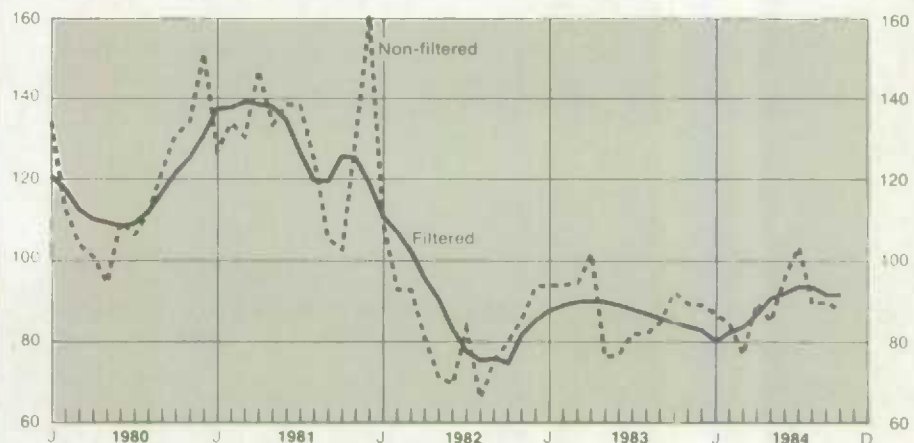
Department Store Sales (\$ million)	Dec.*	1,718.0	11,384.7	4.2
Manufacturers' Shipments (\$ million)	Dec.*	17,930.3	225,817.1	13.2
New Motor Vehicle Sales (\$ million)	Dec.	1,072.6	15,679.8	28.6
Retail Sales (\$ million)	Dec.*	11,854.0	114,917.3	8.2

Statistics are in current dollars and are not seasonally adjusted.

\* - new this week.

## Indexes of Construction Activity in Canada

1971=100



Source: Statistics Canada, Building Permits (64-001)

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### ... Industrial Corporations

The operating margin was basically unchanged at 4.5% for the entire four quarters of 1984. The interest coverage ratio improved marginally to 3.20 times in the fourth quarter from 3.15 times in the third quarter of 1984. This coverage ratio has been relatively stable in the 3.20 range for the past five quarters, after hitting a low of 1.97 times in second quarter 1982. The actual interest expense registered by corporations in fourth quarter 1984 was \$4.2 billion, constant over the past two quarters, but up from the \$3.8 billion of the fourth quarter a year ago.

On a year-over-year basis, unadjusted for seasonal variation, pre-tax profits of corporations increased 12.1% to a level of \$9.5 billion in fourth quarter 1984. This year-over-year profit increase is below the 18.9% registered last quarter, and the 30% or more increases for the five quarters prior to that. It surpassed, however, the \$9.3 billion pre-recession level reached in fourth quarter 1980. Year-over-year sales rose 8.8% to \$158.9 billion in fourth quarter 1984.

For the 1984 year as a whole, pre-tax profits totalled \$35.4 billion, strongly ahead of the \$28.3 billion of 1983 and the \$19.5 billion posted in 1982. Sales in 1984 were \$610.6 billion, compared to \$548.4 billion in 1983 and \$510.0 billion in 1982.

**Order** Industrial Corporations: Financial Statistics (61-003, \$11.10/\$44.40), or contact Business Finance Division (613-990-9843).

### Telecommunications

Telelobe Canada and CNCP Telecommunications report quarterly revenue of \$136.6 million in the third quarter of 1984, up 6.2% from the third quarter of 1983. Operating expenses were \$99.0 million, an increase of 4.7% over the same period in 1983. Net operating revenue was \$37.7 million, compared with \$34.1 million in the third quarter of 1983.

**Order** Communications Service Bulletin, Telecommunications Statistics, Third Quarter, 1984 (56-001, \$1.55/\$15.50), or contact J.R. Slatery (613-990-8693), Transportation and Communications Division.

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### Manufacturing Industries

The seasonally adjusted value of **shipments** in all Canadian manufacturing industries, increased 2.8% to \$19,860.4 million in December 1984 from the revised estimate of \$19,314.1 million in November. Shipments of durable goods were up 3.3% to \$9,131.0 million from \$8,838.9 million; an increase of \$158.3 million in transportation equipment industries and a rise of \$136.4 million in primary metal industries accounted for most of the gain. Increases of \$114.7 million in food and beverage industries and of \$86.9 million in chemical and chemical products industries were the major contributors to a 2.4% increase in non-durable goods industries as shipments went from \$10,475.2 million to \$10,729.4 million.

Seasonally adjusted **inventories owned** by manufacturers at the end of December was \$33,681.8 million, up 1.5% or \$486.4 million from the previous month's revised value of \$33,195.4 million. The increase in inventories owned was mostly concentrated in petroleum and coal products industries as their inventories rose to \$540.6 million. Total inventory held increased 1.4% to \$34,968.8 million from \$34,485.7 million with increases of 2.1% in goods in process, 1.6% in raw materials and 0.6% in finished products.

The seasonally adjusted ratio of total inventory owned to shipments at the end of December was 1.70:1, down from 1.72:1 in November. The ratio of finished products inventory to shipments went from 0.62:1 in November to 0.61:1 in December.

The value of **new orders** received in December increased 3.1% to \$20,008.7 million from the revised November estimate of \$19,401.1 million. In durable goods industries, new orders with an estimated value of \$9,311.9 million were 5.1% higher than the November value of \$8,862.4 million. Increases of \$299.1 million in primary metal industries and \$189.4 million in machinery industries accounted for most of the gain. In non-durable goods industries, new orders received were valued at \$10,696.8 million, up 1.5% from the revised estimate for November of \$10,538.7 million.

The seasonally adjusted **unfilled orders backlog** at the end of December was \$22,607.5 million, up 0.7% from the revised November estimate of \$22,459.2 million. Unfilled orders increased 0.9% in durable goods industries to \$20,357.0 million from \$20,176.1 million at the end of November. In non-durable goods industries, the estimate was down 1.4% to \$2,250.5 million from \$2,283.1 million.

Not adjusted for seasonal variation, manufacturers' shipments in December 1984 were estimated at \$17,930.3 million, 9.6% lower than the revised November value of \$19,840.0 million. Cumulative shipments for the year 1984 were an estimated \$225,817.1 million, up 13.2% from last year's total of \$199,560.8 million.

**Order** the December 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.

### Labour Market Developments in Canada

An article entitled "Labour Market Developments in Canada: 1984" published in the January 1985 issue of **The Labour Force** reviews labour market developments in 1984. The employment and unemployment situation in 1984 is compared with that of 1983, and this comparison is put into the context of longer term trends during and preceding the recent recession. The paper concludes with a comparison of recent Canadian and U.S. labour market developments, noting the relative improvements in each.

Some of the article's main findings:

- In 1984, the annual average participation rate for women 25 and over exceeded 50% for the first time;
- Between 1980 and 1984, men 25 and over increased as a proportion of total unemployment from 29% to 36%, while the proportion of 15-24 year-olds in the unemployed population dropped from 47% to 37%;
- One in 10 of the unemployed in 1984 had been without work for over a year, compared with under 4% in 1980.

Contact R.G. Carter (613-990-9452), Labour Force Activity Section.

### Market Research Handbook

A limited number of Statistics Canada's popular reference source, the **Market Research Handbook, 1984** are still available. This 880-page edition, complete with 272 tables and 49 charts, represents the most comprehensive array of Canadian marketing information available in a single volume.

**Order** Market Research Handbook, 1984 (63-224, Canada: \$33.35; Other Countries: \$40) or contact Maurice Massaad (613-990-9656), Merchandising and Services Division.

### Refined Petroleum Products and Natural Gas

During December 1984, sales of petroleum products by Canadian refiners and major distributors amounted to 6 497 500 cubic metres, down 10.4% from the level recorded in December 1983. Sales of refined petroleum products amounted to 78 418 716 cubic metres in 1984, down 0.3% from the 1983 level. Year-to-date production of petroleum products by Canadian refiners amounted to 87 417 376 cubic metres, up 1.0% from the 1983 total.

During December 1984, sales of natural gas by main distributors amounted to 5 523 383 000 cubic metres, down 3.3% from the level recorded during December 1983. During 1984, sales of natural gas amounted to 47 577 969 000 cubic metres, up 8.6% from the level recorded in 1983.

Contact Richard Godin (613-990-9823), Energy Section, Manufacturing and Primary Industries Division.



## Consumer Price Index

The Consumer Price Index for Canada (1981=100) rose 0.4% between December and January to a level of 124.6. The largest contributing factor in this increase was the food index which rose 1.2% after registering no overall change in the previous three months. The 0.2% rise in the all-items excluding food index largely reflected increases in the housing and transportation indexes, the impact of which was partially offset by a decline in the clothing index.

The year-to-year increase in the CPI — measured by comparing the index level for January 1985 to that of January 1984 — was 3.7%, down marginally from the 3.8% registered in December. This decline was due to the food index having risen only 1.2% this month compared to the 1.9% increase registered in January 1984.

The food index rise of 1.2% in January comprised increases of 1.4% for food purchased from stores and 0.8% for food purchased from restaurants. Sharply higher prices for most fresh vegetables, up 12.8% on average, combined with higher prices for dairy products in Ontario, fruit (notably bananas), poultry, bread, prepared meats and soft drinks were largely responsible for the increase in the food purchased from stores index. These increases were only partially offset by lower prices for beef and sugar. The index for food purchased from stores now stands 4.0% above its level of January 1984 while the index for food purchased from restaurants is 4.2% higher than it was in January 1984. The resulting year-to-year rise in the aggregate food index stands at 3.9%, down from the 4.6% registered in December.

The 0.2% increase in the all-items excluding food index was largely the result of higher housing and transportation costs, the impact of these having been only partially offset by a decline in the clothing index. The rise in the housing index was largely attributable to higher charges for owned accommodation, to higher prices for fuel oil and, in Ontario and Newfoundland, to higher electricity charges. The increase in the transportation index resulted principally from higher prices for new cars and gasoline, and from higher local transit fares in a number of urban centres. Seasonal declines in women's clothing prices largely accounted for the lower clothing index. Between January 1984 and January 1985, the all-items excluding food index rose by 3.6%, virtually unchanged from the 3.5% recorded in December.

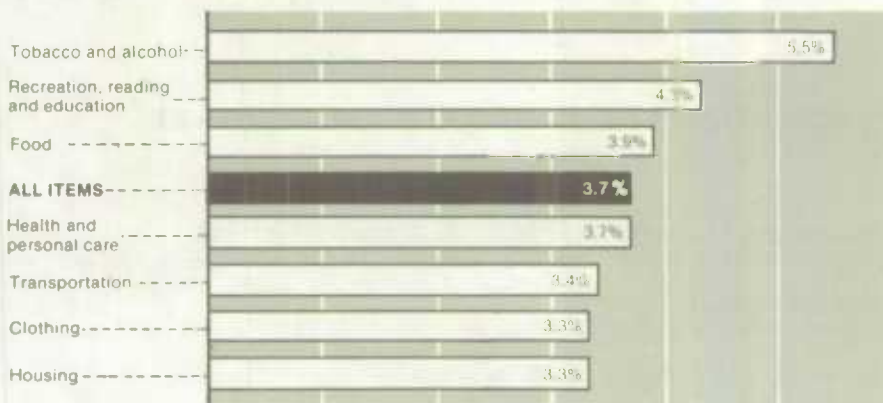
Viewed in terms of goods and services, the index level for goods rose 0.7% in January while that for services rose 0.2%. Between January 1984 and January 1985, the price level for goods rose 3.9% and that for services 3.5%.

On a seasonally adjusted basis, the all-items index increased 0.5% between December and January, with the food index increasing 0.4% while the all-items excluding food index rose 0.5%.

Order the January 1985 issue of The Consumer Price Index (62-001, \$2.75/\$27.50), or contact Sandra Shadlock or Suzanne Glatton (613-990-9606), Prices Division.

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

January 1984 to January 1985



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

## Retail Trade

Canadian retailers failed to benefit from the 1984 Christmas season and registered only a marginal increase in sales over December 1983. Preliminary estimates of total retail trade increased only 1.3% in December 1984 over the same month last year and totalled \$11,854.0 million in current dollars (not adjusted for inflation). The most notable gains in December 1984 were reported in personal accessories stores (+11.2%), garages (+10.4%) and pharmacies, patent medicine and cosmetics stores (+8.3%). Major decreases were recorded by household appliance stores (-13.4%), furniture, T.V., radio and appliance stores (-8.6%) and combination stores (groceries and meat) (-4.7%).

Total sales for the fourth quarter of 1984, not adjusted, were 6.6% higher than the fourth quarter of 1983 and totalled \$32,209.5 million, compared to the \$30,214.8 million recorded in the last quarter of 1983.

### 1984 Data

The preliminary 1984 retail trade estimates rose by 8.2% to \$114,917.3 million in current dollars compared to 1983 retail sales of \$106,243.0 million. With inflation running at close to 4.6% in the case of retail prices in 1984, this gain represents a real growth of more than 3.0% for the retail trade industry in 1984. Among the 28 kinds of businesses covered by the survey, 25 registered higher sales compared to the previous year. Most of the strength originated from the automobile sector, with motor vehicle dealers (+20.9%), garages (+19.3%) and used car dealers (+14.9%) recording the most important increases. The three trade groups reporting decreased sales in 1984 were household appliance stores (-6.7%), furniture, T.V., radio and appliance stores (-1.3%) and general stores (-0.2%).

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

## Department Store Sales

Unadjusted department store sales totalled \$1,718.0 million in December 1984, down 0.8% from the December 1983 level. Sales were lower in 27 of the 40 departments, with the largest decreases reported in piece goods (-21.7%), gasoline, oil, auto accessories, repairs and supplies (-18.2%) and millinery (-13.2%). The most notable increases were recorded in major appliances (+8.1%), china and glassware (+6.8%) and floor coverings (+5.7%).

At the provincial level, when compared to last year, department store sales decreased in British Columbia (-7.2%), Alberta (-3.0%), Prince Edward Island (-2.0%) and Saskatchewan (-0.6%). In the remaining provinces, sales increased from 6.8% in Newfoundland to 0.2% in Ontario. Sales in the Yukon and Northwest Territories rose by 1.9%.

Sales by major department stores in December 1984 totalled \$1,049.6 million, down 2.7% from December 1983. Junior department store organizations had sales of \$668.4 million, up 2.4% from a year earlier.

In December 1984, total department store sales constituted 14.5% of all retail sales in Canada, a slight drop from the 14.8% share held in December 1983.

Total sales for the fourth quarter of 1984 were 3.7% higher at \$3,932.3 million compared to the level recorded for the last quarter of 1983.

Adjusted for seasonal variations and the number of trading days, total department store sales in December 1984 decreased 1.3% to \$967.3 million from the revised November 1984 level of \$979.9 million. Among the 28 departments recording lower sales, the largest decreases were reported in furs (-19.3%) and millinery (-17.4%). The most notable gains were recorded in plumbing, heating and building materials (+6.9%) and major appliances (+5.8%).

Order the December 1984 issue of Department Store Sales and Stocks (63-002, \$3.30/\$33), or contact Michel Kwilecki (613-990-9665), Merchandising and Services Division.



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<b>BUSINESS FINANCE</b>			
Corporation financial statistics, 1982	61-207	\$11.10	\$13.30
<b>EDUCATION, CULTURE AND TOURISM</b>			
<b>Service Bulletin:</b>			
Education Statistics, Vol. 7, No. 1, Federal government expenditures in support of education and training, 1982-83, 1983-84 and 1984-85	81-002	\$1.60/\$16	\$1.90/\$19
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