

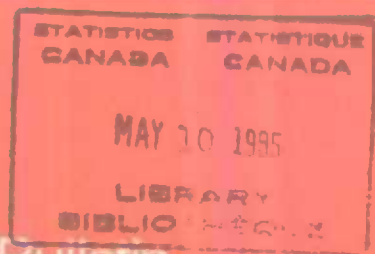


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Weekly Bulletin



May 10, 1985

External Trade

Month-to-Month

On a seasonally adjusted balance of payments basis, preliminary estimates indicate a sharp increase of 7.6% or \$730 million in the value of Canada's total exports, bringing it to a record level of \$10.4 billion in March. This increase follows a slight decline in February and affirms the turnaround of \$275 million which occurred in January. Imports rose moderately by 2.6% (\$210 million) to \$8.1 billion returning to the January level after a drop of \$240 million in February.

The resulting merchandise trade surplus in March was \$2.2 billion, second in value only to the record of \$2.4 billion set in October of last year.

Quarter-to-Quarter

In the first quarter of 1985, total exports increased \$895 million to \$29.7 billion, 12.3% higher than the first quarter of 1984. This value is slightly higher than the \$29.6 billion posted for the third quarter of 1984 and represents an increase of 3.1% over the fourth quarter level of \$28.8 billion.

Imports followed a similar but more pronounced pattern as the decline was deeper in the fourth quarter. Imports for the first quarter of 1985 were \$24.3 billion, \$1,270 million over the fourth quarter of 1984 and slightly higher than the third quarter value of \$24.2 billion.

The merchandise trade surplus in the first quarter of 1985 fell \$0.4 billion to \$5.4 billion from \$5.8 billion in the fourth quarter.

Commodity Analysis

Much of the \$730 million increase in exports occurred in energy products and in fabricated materials of various types. Exports of refined petroleum products, recovering from an exceptionally low value in January, rose \$55 million in February and \$126 million in March. Exports of crude petroleum were up \$61 million and coal and electricity exports increased by more than \$50 million each. Exports of most chemical groups were up in March, offsetting losses in February. Both lumber and paper (newsprint and other paper) showed significant increases (up \$39 million and \$37 million respectively) but woodpulp exports continued a slide begun in late 1984. Automobile exports advanced \$146 million, reversing a decline of \$169 million in February, while exports of automotive parts fell \$50 million for the third consecutive month.

(continued page 2, col. 1)

LATEST MONTHLY STATISTICS

EMPLOYMENT, INCOME

	Feb.	412 87	411 53	3.6
Average Weekly Earnings (\$)	Feb.	19,655.6	19,599.6	7.1
Labour Income (\$ million)	Mar.	10 86	10 77	2.5
Persons with Jobs (million)	Mar.	1,546,000	1,455,000	0.3
Unemployed				

INVENTORIES

Department Store (\$ million)	Feb.	2,970.2	3,014.1	-5.6
Manufacturers' Owned (\$ million)	Feb.	33,647.5	33,625.4	5.7

ORDERS

Manufacturers' New Orders (\$ million)	Feb.	18,247.1	18,650.0	0.6
Manufacturers' Unfilled Orders (\$ million)	Feb.	22,156.0	22,190.3	4.5

PRICES

Consumer Price Index (1981=100)	Mar.	125.7	125.4	3.7
New House Price Index (1981=100)	Mar.	95.2	95.0	-0.1
Raw Materials Price Index (1977=100)	Mar.	222.9	222.4	2.2
Excl. coal, crude oil, nat. gas	Mar.	158.2	157.6	-3.8
Industry Selling Price Index (1971=100)	Mar.	317.5	316.4	2.9

CONSTRUCTION

Building Permits (\$ million)	Feb.	779.1	1,553.8	3.0
Housing Starts — Urban Centres (units)	Mar.	7,077	21,001	-2.5

ENERGY

Coal Production (thousand tonnes)	Dec.	5 008	57 428	28.2
Electricity Generation (terawatt hours)	Dec.	40.9	424.6	7.4
Natural Gas Production (million cubic metres)	Dec.	9 772	89 865	7.9
Petroleum Refining (million cubic metres)	Dec.	7.7	87.6	1.5

FOREIGN TRADE

Exports — Balance of Payments Basis (\$ million)	Mar.	10,511	28,781	11.2
Imports — Balance of Payments Basis (\$ million)	Mar.	8,447	23,674	8.1

PRODUCTION

Railway Carloadings (million tonnes)	Feb.	17.2	35.6	0.1
Steel (ingots — thousand tonnes)	Feb.	1 150	2 298	-5.6

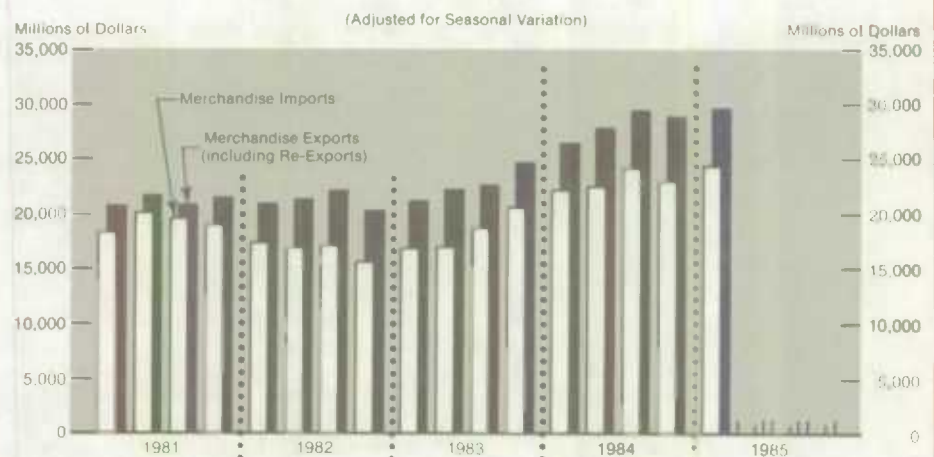
SALES

Department Store Sales (\$ million)	Feb.	647.1	1,339.7	2.4
Manufacturers' Shipments (\$ million)	Feb.	18,281.4	36,538.4	5.2
New Motor Vehicle Sales (\$ million)	Mar.	1,741.4	4,096.8	14.7
Retail Sales (\$ million)	Feb.	8,291.0	16,815.9	8.5

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

...External Trade

Half of the \$210 million increase in imports in March was due to large imports of precious metals. Imports of crude petroleum and refined petroleum products were higher (up \$65 million and \$40 million), following lower imports during February. Automobile imports gained \$70 million to \$936 million. Imports of trucks rose slightly, but a downward trend continues.

Trading Partner Analysis

Exports to the United States, currently accounting for nearly 78% of total exports, now stand at a record \$8.1 billion in March, after a large gain of \$660 million (8.9%) over February. A \$53 million drop in exports to the United Kingdom was offset by a \$43 million gain in exports to Other EEC countries. Exports to Japan remained constant.

Imports from the United States rose fractionally to \$5.9 billion. Imports from all other countries rose modestly in March. Imports from the United Kingdom continue at a level substantially below 1984 values. Imports from Japan have established a distinct downward trend.

Order the March 1985 issue of Summary of Canadian International Trade (65-001, \$15/\$150), or contact G. Blaney (613-990-9647), or John Butterill (613-990-9784), International Trade Division.

For summary information, available on the day of release, order Preliminary Statement of Canadian International Trade (65-001P, \$5/\$50).

Labour Income

Labour Income for the month of February 1985 was estimated at \$19,655.6 million, an increase of \$1,299.5 million or 7.1% from February 1984.

Adjusted for seasonal variation, wages and salaries decreased by \$8.1 million between January 1985 and February 1985 to \$18,181.8 million.

Order the January-March, 1985 issue of Estimates of Labour Income (72-005), or contact Georgette Gauthier (613-990-9900), Labour Division.

Gross Domestic Product

(Seasonally Adjusted)

1971 dollars
(\$ billions)



Source: Statistics Canada, Gross Domestic Product by Industry (61-005)

New Motor Vehicle Sales

Sales of all new motor vehicles registered an increase of 7.5% over the previous year in March 1985, rising to 137,704 units. Compared to March 1984, sales of North American manufactured passenger cars and commercial vehicles increased by 3.5% to 76,293 and 6.1% to 30,143 units respectively. Sales of passenger cars built overseas rose by 19.8% to 27,114 units; sales of overseas-built commercial vehicles increased by 23.6% to 4,154 units. Between March 1984 and March 1985, sales of passenger cars imported from Japan increased by 6.2% to 18,399 units, while sales of passenger cars imported from other countries increased by 64.1% to 8,715 units.

The share of the Canadian passenger car market held by North American manufacturers in March 1985 was 73.8%. Japanese manufacturers held a market share of 17.8%. Manufacturers from other countries held 8.4% of the passenger car market, a substantial increase from the 5.5% held in March 1984.

The total dollar value of all new motor vehicles sold in March 1985 increased by 13.9% from a year earlier to \$1,741.4 million. Sales of North American passenger cars reached \$900.5 million, up 9.3% over the corresponding month in 1984. The total sales of commercial vehicles built in North America amounted to \$469.5 million, up 14.5%. Sales of overseas passenger cars and commercial vehicles rose by 25.3% and 31.0% to reach \$327.4 million and \$44.0 million respectively.

Increases in total unit sales of motor vehicles in March 1985, compared to a year earlier, were reported in Quebec (+3.6%), British Columbia (+4.3%), Manitoba (+5.3%), Alberta (+14.0%) and Ontario (+15.0%). The remaining provinces registered lower unit sales of motor vehicles compared to March 1984, with decreases ranging from 3.3% in New Brunswick to 18.9% in Prince Edward Island.

Gross Domestic Product and Industrial Production

Gross Domestic Product in constant 1971 prices grew 0.2% in February 1985, following a revised increase of 0.2% in January and no growth in December. The average level of output for January and February is now 0.7% above the fourth quarter of 1984. Industrial production declined by 0.3% in February after a decline of 0.8% in January.

For the second consecutive month output of service-producing industries expanded while goods-producing industries declined. Significant growth occurred in insurance and real estate agencies as housing sales again rose. Wholesale trade also contributed a major share of the February increase in GDP. Retail trade expanded again in February, indicating that the strength in consumer demand for goods continued this month.

The recovery of residential construction was outweighed by a weakening in non-residential construction. Over the January to March period housing starts averaged 134,000 units seasonally adjusted, compared to 125,000 in the October-December period. Housing starts are still below their average of over 146,000 units in the third quarter of 1984.

Manufacturing output fell 0.4% in February following a 1.4% decrease in January. The major production decreases were in motor vehicle manufacturing and office and store machinery. Decreased exports were responsible for the decline in motor vehicle manufacturers. Significant production gains were recorded by metal fabricating industries, electrical products industries, textiles, sawmills and furniture and fixtures manufacturers. Employment in manufacturing industries in February decreased 0.7%, according to the Labour Force Survey.

Mining, iron mining and mineral fuels increased in February. Other metal mining decreased, mainly as a result of reduced export demand.

Order the February 1985 issue of Gross Domestic Product by Industry (61-005, \$10/\$100) or contact Ron Kennedy (613-990-9145), Industry Measures and Analysis Division.

Total sales in units reported for the first three months of 1985 increased 9.2% over the same period last year to reach 324,842 units. The value was \$4,096.8 million, an increase of 14.7%.

Adjusted for seasonal fluctuations and the number of trading days, preliminary estimates of unit sales of passenger cars built in North America increased 3.2% (67,485 units) in March 1985, over the February 1985 level. Seasonally adjusted sales of passenger cars built overseas increased 5.0% (24,737 units) from the previous month, while total sales of commercial vehicles, both domestic and overseas, were lower by 0.1% (28,614 units).

Order the March 1985 issue of New Motor Vehicle Sales (63-007, \$8/\$80), or contact Michael Kwilecki (613-990-9665), Industry Division.

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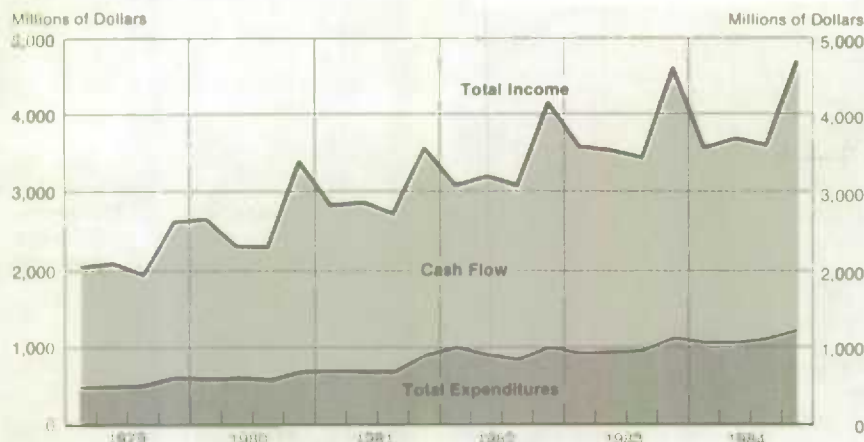
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Quarterly Estimates of Income and Expenditures of Trusteed Pension Funds



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

Help-wanted Index

The seasonally adjusted Help-wanted Index (1981=100) for Canada increased by almost 6% to 74 between March and April 1985.

The index increased in the Atlantic Provinces, Quebec and Ontario, but it declined in the Prairie Provinces and British Columbia.

The following listing shows the seasonally adjusted April Help-wanted Indexes for Canada and the regions as well as percentage changes relative to March 1985:

- Canada, 74 (+5.7%)
- Atlantic Provinces, 233 (+25.9%)
- Quebec, 77 (+13.2%)
- Ontario, 84 (+6.3%)
- Prairie Provinces, 38 (-2.6%)
- British Columbia, 28 (-9.7%)

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

Canadian Airlines

Operational Statistics

According to the advance annual statistics on major Canadian air carriers' operation in 1984, the number of passenger-kilometres rose by 6.8%, as compared to the previous year, to 44 827.3 million. This followed two successive drops of 2.9% and 4.2% respectively in 1983 and 1982. The number of tonnes-kilometres increased 14.8% in 1984 over the previous year and reached 1 120.7 million.

Canadian airlines had 4.9% more hours flown in 1984 than in 1983 with 620 thousand hours, while total consumption of turbo fuel which decreased 4.3% and 8.5% respectively in 1982 and 1983 registered a 3.9% gain in 1984.

Financial Statistics

Total operating revenues reported by the carriers for the year 1984, were 9.5% higher than last year and reached \$4,252.2 million. Total operating expenses posted a 7.0% rise over last year and totaled \$4,096.2 million.

Business Conditions

The weighted proportion of manufacturers that forecast production to increase or remain about the same over the next three months was up from 77% in the January survey to 85% in the April survey. The proportion indicating that new orders have risen, increased by eight percentage points from 21% in January to 29% in April. It should be noted that while the questions asked of manufacturers attempt to compensate for seasonal factors, nevertheless a substantial proportion of the foreseen increase in production and actual new orders reported between the January and April 1985 surveys reflect a seasonal pattern. Canadian manufacturers continue to be cautious about inventory build-up with only 3% having indicated that their finished product inventory was too low.

Contact T. Newton (613-990-9832), Industry Division.

Provincial Government Employment

Employees of provincial and territorial governments and government enterprises numbered 559,632 as of December 1984, an overall increase of 2,274 (0.4%) from December 1983. General government employees increased by 8,213 (2.0%), while those in government enterprises declined by 5,939 (-3.9%).

Gross payroll including overtime and retroactive payments for October-December 1984 was \$3,888.9 million, an increase of \$151.3 million (4.0%) from the corresponding quarter in 1983.

Order the October-December 1984 issue of Provincial and Territorial Government Employment (72-007, \$15/\$60), or contact T. Moore or P. Dudley (613-990-8305), Public Institutions Division.

Order the April 1985 issue of the service bulletin Aviation Statistics Centre (51-004, \$8.50/\$85), or contact J. Bekooy (819-997-6190), or J.-P. Simard (819-997-6182), Aviation Statistics Centre.

Trusteed Pension Funds

In the fourth quarter of 1984, the assets of trusteed pension funds reached a total of \$95.8 billion, an increase of 4.1% over the previous quarter. Three-quarters of this increase was allocated to investments in bonds and equities. Bonds increased at the rate of 4.3% and equities, 3.7%, but as a proportion of total assets, these two investment vehicles remained the same. In comparison to the same quarter of 1983, these assets grew by 14%, increasing from \$84.1 billion to \$95.8 billion.

Total income of these funds in the fourth quarter of 1984 amounted to \$4.7 billion and expenditures, to \$1.2 billion, leaving a net cash flow of \$3.5 billion.

Order the fourth quarter 1984 issue of Quarterly Estimates of Trusteed Pension Funds (74-001, \$10/\$40), or contact Hubert Frenken (613-990-9900), Labour Division.

International Travel

Total Travellers

During March 1985, preliminary statistics show that an estimated 1.9 million United States residents entered Canada, up 13.7% from March 1984. Visitors from other countries increased by 11.9% to 77,300 in March. Canadian residents re-entering the country following visits to the United States totalled 3.0 million, down 1.6% from March 1984. Canadians returning from visits to all other countries increased by 22.8% to 278,800.

For the first quarter 1985, total international travel flows were as follows: 4.7 million United States residents entered Canada, up 3.1% from 1984; visitors from other countries increased by 4.2% to 188,500; Canadians returning from the United States decreased by 2.5% to 7.8 million, while residents returning from other countries numbered 698,800, up 16.6% from 1984.

Estimation of Tourists

Preliminary data show that long-term tourist entries (overnight or longer auto and bus traffic and all entries by boat, plane and train) from the United States increased by 8.4% to 453,000 in March 1985.

Residents of other countries — excluding those arriving by land via the United States and intending to stay less than 24 hours — numbered 72,000, up 11.0% from last year. Canadian tourist re-entries from the United States numbered 946 700 in March, down 8.4%, while residents returning from countries other than the United States increased by 22.8% to 278,800.

For the first quarter of 1985, tourists from the United States numbered 1.1 million up 2.6% from 1984. The number of tourists from other countries increased by 4.2% to 176,300 during the January-March period. Canadian tourist re-entries from the United States numbered 2.2 million, down 6.3% from a year earlier, while residents returning from countries other than the United States increased by 16.6% to 698,800.

Order the March 1985 issue of International Travel — Advance Information (66-002, \$1.60/\$16), or contact Paul L. Paradis (613-990-8932), International Travel Section.



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Production and stocks of eggs and poultry, February 1985	23-003	\$10/\$100	\$11/\$110
BUSINESS FINANCE			
Industrial corporations: Financial statistics, Fourth Quarter 1984	61-003	\$45/\$180	\$55/\$220
CONSTRUCTION			
Housing starts and completions, February 1985	64-002	\$15/\$150	\$16/\$160
Private and public investment in Canada, Intentions 1985	61-205	\$25	\$26
DEMOGRAPHY			
Postcensal annual estimates of population by marital status, age, sex and components of growth for Canada, provinces and territories, June 1, 1984	91-210	\$22	\$23
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Imports by commodities, February 1985	65-007	\$50/\$500	\$60/\$600
INTERNATIONAL AND FINANCIAL ECONOMICS			
Security transactions with non-residents, February 1985	67-002	\$15/\$150	\$15/\$180
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Employment, earnings and hours, January 1985	72-002	\$35/\$350	\$36.50/\$365
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MERCHANDISING AND SERVICES			
Department store sales by regions, March 1985	63-004	\$2/\$20	\$3/\$30
New motor vehicle sales, February 1985	63-007	\$8/\$80	\$9/\$90
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Service bulletin:			
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Forecasts	88-001	\$6/\$60	\$7/\$70
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Railway carloadings, 7-day period ending April 14, 1985	52-005	\$75	\$100
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Service bulletin:			
Aviation statistics centre, Vol. 17, No. 3, Major Canadian Airlines, January 1985 and Year 1984	51-004	\$8.50/\$85	\$9.50/\$95

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