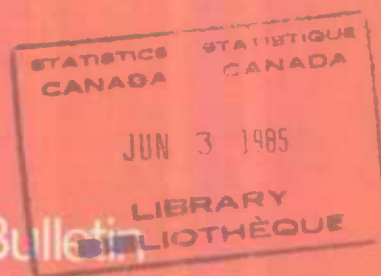



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Weekly Bulletin



May 31, 1985

Construction

Construction activity for 1983 and 1984 amounted to \$55,947.8 million and \$56,130.1 million respectively. These expenditures are expected to increase to \$58,962.2 million in 1985. The construction program anticipated for 1985 exceeds 1984 by \$2,832.0 million or 5.0% which compares with a slight increase of 0.3% realized in 1984. In constant dollars, 1984 showed a decrease of \$275 million or 1.4%.

The analysis of the total value of work to be put in place in 1985 by the various industries reveals some significant variations over 1984. Forestry shows the largest percentage increase (16.1%), followed by mining (13.4%) and finance (11.7%). Small decreases are expected to occur in utilities (-2.8%), trade (-2.6%) and agriculture and fishing (-1.9%).

Expenditures in most of the provinces are expected to increase in 1985 with notable advances of 12.0 in Alberta and 11.9% in Saskatchewan. However, in contrast to these, the provinces of New Brunswick and British Columbia (including the Yukon and Northwest Territories) reflect decreases of 2.0% and 2.6% respectively, during 1985.

In 1985, new construction is estimated to be up 4.9% while the repair portion shows an increase of 5.8%. The proportion of the complete program to be performed under contract during 1985 will be 64.7%. The value of engineering type construction at

(continued on page 2, col. 1)

LATEST MONTHLY STATISTICS

EMPLOYMENT, INCOME

			Previous Month	% Change From Year Ago
Average Weekly Earnings (\$)	Mar.	414.20	412.67	3.3
Labour Income (\$ million)	Feb.	19,655.6	19,599.6	7.1
Persons with Jobs (million)	Apr.	11.02	10.86	3.2
Unemployed	Apr.	1,437,000	1,546,000	-2.1

INVENTORIES

Department Store (\$ million)	Feb.	2,970.2	3,014.1	-5.6
Manufacturers' Owned (\$ million)	Mar.	33,913.0	33,713.3	5.0

ORDERS

Manufacturers' New Orders (\$ million)	Mar.	20,383.7	18,443.9	2.7
Manufacturers' Unfilled Orders (\$ million)	Mar.	22,533.0	22,304.7	5.0

PRICES

Consumer Price Index (1981=100)	Apr.	126.2	125.7	3.9
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)	Mar.	20.1	55.7	2.1
Steel (ingots — thousand tonnes)	Mar.	1,296	3,589	-4.7

SALES

Department Store Sales (\$ million)	Feb.	647.1	1,339.7	2.4
Manufacturers' Shipments (\$ million)	Mar.	20,155.4	56,730.6	4.5
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.

Employment and Earnings

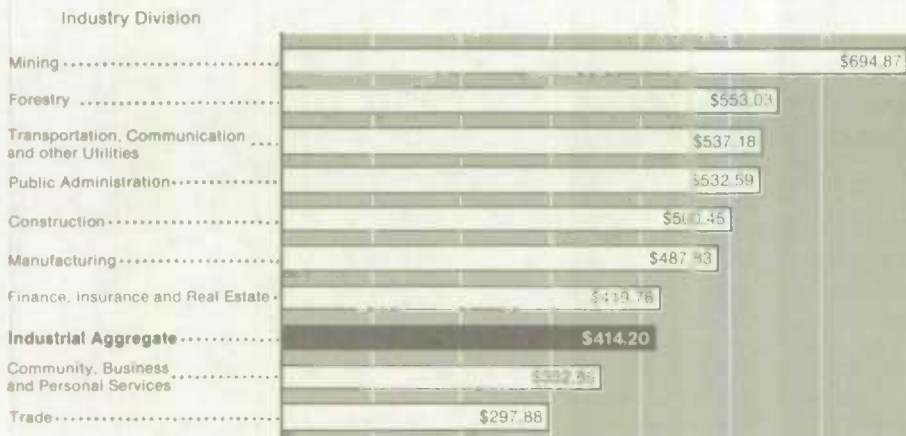
The preliminary estimates of employment for the Canada industrial aggregate increased by 0.8% from February to March 1985. All industry divisions contributed to the increase except forestry and public administration which decreased. All provinces and territories increased, with the exception of Newfoundland which decreased.

Average weekly earnings, at the Canada industrial aggregate level, showed a small increase (0.4%) rising from \$412.67 in February to \$414.20 in March. All industry divisions increased except forestry, mining, finance, insurance and real estate. All provinces registered increases with the exception of Alberta and the Northwest Territories which decreased.

Order the March 1985 issue of Employment, Earnings and Hours (72-002, \$35/\$350), or contact the Labour Division (613-990-9900).

Average Weekly Earnings in Canadian Industry

March 1985*



Source: Statistics Canada, Employment, Earnings and Hours (72-002)

* Preliminary Estimates

Canada

...Construction

44.7% of the total expected for 1985 is up 6.4% over 1984 and the building activity portion (55.3%) is up 4.0% over the year before. The strength (in dollars) in the engineering group of structures is primarily due to projects classified under gas and oil facilities and road, highway and airport runways. As noted above, building construction will probably rise by 4.0% with the largest dollar increase in residential buildings and commercial type buildings such as theatres and recreational buildings, stores, office buildings and garages.

Order Construction in Canada, 1983-1985 (64-201, \$35), or contact Margaret Hartley (613-990-9812), Capital Expenditures Section, Science, Technology and Capital Stock Division.

Renal Failure

According to the Canadian Renal Failure Register, a total of 7,243 patients with chronic renal failure were under care of Canadian renal failure centres at year-end 1984. Compared with 1981, the first year of the new Register, this represents a growth of 22% in the rate (per million population) of all patients under care.

In the four-year period, the largest increase, 35%, occurred in the rate of patients treated by peritoneal dialysis. In contrast, patients treated by haemodialysis increased by only 9%.

In the same period, there was an encouraging growth in the rate of patients alive with a functioning transplant (29%) and in transplant operations performed (32%).

Contact Anna Malhotra (613-990-8553), Health Division.

Union Wage Rate

The Canada total Union Wage Rate Index for construction trades (including supplements) registered no change between March and April 1985, remaining at a level of 127.7.

On a year-over-year basis, the Canada total index rose 0.4%. City indexes in Quebec and the Western Provinces showed no change, while Ontario and New Brunswick reported marginal increases (less than one percent). Only in Halifax did wage rates increase sharply (10.3%). Conversely, the index for St. John's, Newfoundland posted a decrease (-5.2%).

Order Construction Price Statistics (62-007, \$15/\$60), or contact Prices Division (613-990-9601).

Steel Ingots

Preliminary estimates indicate that Canadian steel ingot production for the week ending May 25, 1985 totalled 277 379 tonnes, a decrease of 3.4% from the preceding week's total of 287 064 tonnes and down 6.3% from the year-earlier level of 295 893 tonnes.

Contact Gerry W. Barrett (613-990-9826), Industry Division.

Building Construction Activity

The leading indicator of construction activity in Canada (1981=100) dropped 0.6% in January 1985, to 71.4 from 71.8 in December 1984. The retreat of the index was caused by the persistent weakness of intentions recorded for several months in the residential sector.

The downward trend of the residential index started last July, and continued on in January 1985. The filtered index of residential construction slipped 0.7% to 73.5 from the previous month. Weak intentions recorded in both the single and multiple dwelling sector explain the January decrease of the index. On a regional basis, the trend-cycle of residential building permits increased only in the Atlantic provinces. The situation levelled off in Quebec while decreases were recorded in the other regions.

The filtered index of non-residential construction was unchanged (69.5) in January, maintained by the strength of the industrial (+3.1%) sector. Therefore intentions in the commercial (-2.1%) and governmental (-2.4%) sectors continued to decrease. The trend-cycle of non-residential permits registered a stable situation in all regions, except in the Atlantic provinces where a slight decrease occurred.

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

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Mineral Wool

During April 1985, manufacturers shipped 4 204 472 square metres of mineral wool (all R factors) in batts, down 27.6% from the 5 807 024 square metres shipped in the same period last year.

Order the April 1985 issue of Mineral Wool Including Fibrous Glass Insulation (44-004, \$4/\$40), or contact S.M. Boyer (613-990-9835), Industry Division.

Crude Petroleum and Natural Gas

During February 1985, production of crude oil and equivalent hydrocarbons amounted to 6 997.5 thousand cubic metres, down 0.1% from the previous year. Exports were up 56.4% to 2 203.9 thousand cubic metres, and imports fell 48.0% to 6 878 thousand cubic metres. Canadian refinery receipts of crude oil totalled 54 985 thousand cubic metres, down 19.0% from the previous year.

During the same month, net withdrawals of natural gas rose 20.9% to 9 250.8 million cubic metres. Marketable production of natural gas after treatment at processing plants amounted to 7 517.9 million cubic metres, up 24.2%, while net withdrawals of natural gas liquids (propane, butanes and ethane), reached 1 235.1 thousand cubic metres, up 7.3% from the previous year. Exports of natural gas amounted to 2 668.9 million cubic metres, up 52.5%, and sales in Canada rose 16.4% from last year to 5 883.8 million cubic metres.

Order the February 1985 issue of Crude Petroleum and Natural Gas Production (26-006, \$8/\$80), or contact Gerard O'Connor (613-990-9823), Energy Section, Industry Division.

Major Appliances

According to the new survey on major appliances, Canadian firms produced 191,886 units during April 1985, of which 156,297 units were sold domestically during the same period.

Compared to the previous month, this represents a less than 1% increase in domestic sales, while their production increased 1.2% over the 189,429 units produced during March 1985.

Order the April 1985 issue of Production, Sales and Stocks of Major Appliances (43-010, \$4/\$40), or contact Louis Boucher (613-990-9835), Industry Division.

Livestock and Animal Products Statistics

This report covers livestock and animal products in Canada. Basic data pertaining to numbers, prices and value of livestock and the production of animal products are included in this report.

Order the 1984 issue of Livestock and Animal Products (23-203, or contact B.E. Rosien (613-990-8714), Agriculture/Natural Resources Division.

Stocks of Frozen Meat

Total frozen meat in cold storage at the opening of the first day of May, amounted to 39 669 tonnes as compared with 38 909 tonnes last month and 35 970 tonnes a year ago.

Order the May issue of Stocks of Frozen Meat Products (32-012, \$2.75/\$27.50), or contact P.L. Beerstecher (613-990-8714), Agriculture/Natural Resources Division.

Industrial Corporations

Seasonally Adjusted

According to first quarter 1985 preliminary survey results, seasonally adjusted pre-tax profits of industrial corporations remained unchanged from the previous quarter's record level of \$10.2 billion. The current leveling of profits follows 10 consecutive quarters of growth, although the quarterly increases had been moderating throughout 1984.

The current quarter's tempered results stem largely from a lack of growth in sales, which remained at \$176.2 billion. In addition, profits would have declined had it not been for a reduction in interest expense of \$0.4 billion to \$5.6 billion. On an industry basis, 26 of the 47 industries posted declines in seasonally adjusted pre-tax profits, most notably Primary Metals and Electrical Products. The Distillery and Mineral Fuels industries registered the largest increases of the 19 industries showing profit growth, while two industries remained unchanged.

The operating margin, relating operating income to sales, has remained basically constant around 4.0% over the past four quarters. The interest coverage ratio, which measures the ability of corporations to meet interest charges out of current profits, improved to 2.84 times in first quarter 1985 from the 2.70 registered last quarter.

Unadjusted

On a year-over-year basis, unadjusted for seasonal variation, pre-tax corporate profits rose 10.5% to a level of \$9.9 billion in the first quarter 1985. This is the ninth consecutive yearly increase in pre-tax profits, although the magnitude of the growth rate has been steadily declining over the past six quarters.

Year-over-year sales rose 6.1% to currently stand at \$171.7 billion.

Order Industrial Corporations' Financial Statistics (61-003), or contact Bill Potter or Gail Campbell (613-990-9843), Industrial Organization and Finance Division.

Sawmills East of the Rockies

Production of lumber in sawmills east of the Rockies increased in March 1985 to 799,321,000 feet board measure (1 886 187 cubic metres) from 764,866,000 feet board measure (1 804 883 cubic metres), after revisions, in March 1984.

Stocks on hand at the end of March 1985 totalled 1,181,893,000 feet board measure (2 788 957 cubic metres).

Order the March 1985 issue of Production, Shipments and Stocks on Hand of Sawmills East of the Rockies (32-002, \$8/\$80), or contact Patrick E. Martin (613-990-9826), Industry Division.

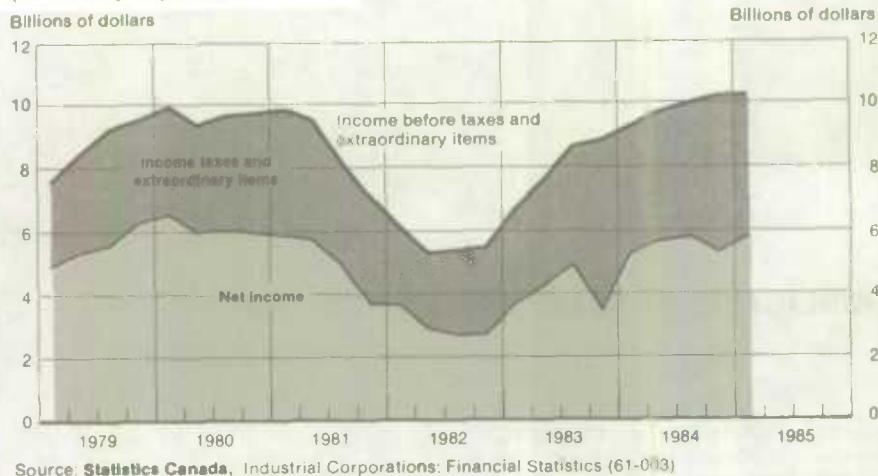
Asphalt Roofing

Shipments of asphalt shingles totalled 2 372 938 metric bundles in April 1985, a decrease of 7.3% compared to the year-earlier total of 2 559 496 metric bundles.

Order the April 1985 issue of Asphalt Roofing (45-001, \$4/\$40) or contact Gerry W. Barrett (613-990-9826), Industry Division.

Corporation Profits Industrial Corporations Sector

(Seasonally Adjusted)



Wholesale Trade

Sales

Wholesale merchants' sales increased significantly in March 1985, resulting in a 13.0% advance over the same period last year. Revised sales for February 1985 were up a modest 4.1% from the February 1984 level.

In March 1985, all major trade groups, with the exception of lumber and building materials (-6.8%), registered increased sales from a year earlier. The most notable gains were reported by the following major trade groups: other machinery, equipment and supplies (+23.8%); motor vehicles and accessories (+21.8%); and metals, hardware, plumbing and heating equipment (+16.9%). All regions posted sales increases from a year earlier, ranging from 17.4% in the Atlantic provinces to 10.5% in Quebec.

Cumulative sales by wholesale merchants for the first three months of 1985 were up a robust 9.3% over the January-March 1984 period. Exceptional gains were reported by wholesalers of other machinery, equipment and supplies (+19.0%); and metals, hardware, plumbing and heating equipment (+18.5%).

Inventories

Wholesale inventories in March 1985 increased by 7.0% from the corresponding period in 1984, the same rate as in February 1985.

The ratio of inventories to sales at the end of March 1985 was 1.63:1, down significantly from 1.72:1 a year earlier.

Order the March 1985 issue of Wholesale Trade (63-008, \$5/\$50), or contact the Wholesale Trade Section (613-990-9679), Industry Division.

Corrugated Box and Wrappers

Canadian manufacturers shipped 166 036 thousand square metres of corrugated boxes and wrappers in April 1985, an increase of 12.5% compared to 147 574 thousand square metres the previous year.

International Travel

Preliminary estimates for the first three months of 1985 show that this country had an international travel account deficit of \$1,445 million, up from the \$1,355 million deficit recorded in the first quarter of 1984. Receipts from international travel amounted to \$519 million, up 7.9% from the first quarter of 1984, while payments by Canadians travelling abroad increased by 7.0% to \$1,964 million.

Final estimates for 1984 show that Canada earned \$4,416 million from international travel, up 15.0% from 1983. During the same period, Canadians travelling abroad increased their payments by 8.2% to \$6,542 million, leaving the international travel account a deficit of \$2,126 million.

Order the January-March issue of Travel Between Canada and Other Countries (66-001, \$35/\$140) or contact Paul L. Paradis (613-990-8932) International Travel Section.

Light Bulbs and Tubes

Canadian light bulbs and tube manufacturers sold 19,661,037 units during April 1985, a decrease of 10.8% over the 22,065,490 units sold during the previous month.

This represented \$20,750,363 worth of sales to Canadian manufacturers in April 1985, a decrease of 11.8% over March 1985. Compared to last year, the April 1985 sales of light bulbs and tubes increased 1.9% over the \$20,348,891 of April 1984.

Order the April 1985 issue of Electric Lamps (light bulbs and tubes), (43-009, \$4/\$40), or contact Louis Boucher (613-990-9835), Industry Division.

January to April 1985 domestic shipments totalled 645 926 thousand square metres compared to 619 046 thousand square metres in 1984, an increase of 4.3%.

Order the April 1985 issue of Shipments of Corrugated Boxes and Wrappers (36-004, \$4/\$40), or contact Gerry W. Barrett (613-990-9826), Industry Division.

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Production of selected biscuits, Quarter ended March 1985	32-026	\$5/\$20	\$6/\$24
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