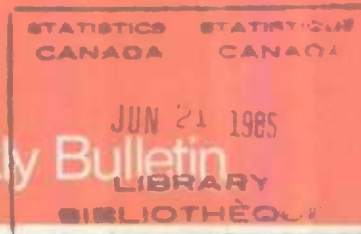


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Weekly Bulletin



June 21, 1985

## Canada's Foreign Trade in Automotive Products

### Trade with the United States, Reconciled Basis

During the first three months of 1985, Canada accumulated a \$1.4 billion trade surplus in automotive products with the United States. This was \$155 million more than the surplus of \$1.2 billion recorded in the corresponding time period of last year, but represented the smallest increase in four years.

Exports to the United States increased 15.7% to \$8.2 billion in the first quarter of 1985. The largest gain occurred in automotive parts which rose 22.5% to \$3.0 billion while exports of cars posted a 10.3% increase to \$3.4 billion. Imports registered a similar increase of 16.4% to \$6.8 billion.

### Trade with Overseas Countries, Customs Basis

The trade deficit in automobile products with countries other than the United States totalled \$829 million during the first quarter of 1985, an increase of \$133 million from the corresponding period of last year. Imports, at \$990 million, were up 13.1%, largely due to a 16.8% increase in cars to \$494 million. In contrast, exports fell 10.1% to \$161 million.

(continued page 2, col. 1)

## Capacity Utilization Rates

Capacity utilization in Canadian manufacturing remained relatively unchanged in the first quarter of 1985, edging down 1.0% to a level of 76.0% from 76.8% in the fourth quarter of 1984.

In the latest quarter, lower capacity utilization rates were posted in 13 of the 19 industry groups. Of these 13 industry groups, eight of them registered decreases of 3.0% or less. The most important declines were in the rubber and plastic products industries (9.9%), knitting mills and clothing industries (6.3%) and in petroleum and coal products (5.1%). There was only one significant increase and that was in electrical products which were up by 4.5%.

Utilization rates in durable manufacturing industries decreased by 0.3% in the first quarter of 1985 to 71.9% of capacity from 72.1% in the previous quarter. In the non-durable sector, capacity utilization decreased 1.6% to 80.2% from 81.5%.

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

## LATEST MONTHLY STATISTICS

### EMPLOYMENT, INCOME

Average Weekly Earnings (\$)	Mar.	414.20	412.67	3.3
Labour Income (\$ million)	Mar.	19,756.0	19,565.3	7.4
Persons with Jobs (million)	May	11.41	11.02	3.6
Unemployed	May	1,329,000	1,437,000	-9.0

### INVENTORIES

Department Store (\$ million)	Apr.*	3,540.7	3,275.6	-1.8
Manufacturers' Owned (\$ million)	Apr.*	34,049.5	34,181.2	4.7

### ORDERS

Manufacturers' New Orders (\$ million)	Apr.*	19,994.8	20,458.3	8.4
Manufacturers' Unfilled Orders (\$ million)	Apr.*	22,390.0	22,458.9	4.8

### PRICES

Consumer Price Index (1981=100)	May*	126.5	126.2	3.9
New House Price Index (1981=100)	Apr.	95.3	95.2	-0.2
Raw Materials Price Index (1977=100)	Apr.	223.2	223.1	2.2
Excl. coal, crude oil, nat. gas	Apr.	158.6	158.2	-3.8
Industry Selling Price Index (1971=100)	Apr.	317.8	317.6	2.4

### CONSTRUCTION

Building Permits (\$ million)	Mar.	1,184.8	2,788.7	5.2
Housing Starts — Urban Centres (units)	Apr.	11,714	32,715	6.9

### ENERGY

Coal Production (thousand tonnes)	Feb.	5,026	10,350	12.4
Electricity Generation (terawatt hours)	Feb.	38,599	82,585	6.0
Natural Gas Production (million cubic metres)	Feb.	9,251	19,298	12.5
Petroleum Refining (thousand cubic metres)	Feb.	7,409	13,447	-12.5

### FOREIGN TRADE

Exports — Balance of Payments Basis (\$ million)	Apr.	10,360	39,141	12.2
Imports — Balance of Payments Basis (\$ million)	Apr.	8,907	32,581	9.9

### PRODUCTION

Railway Carloadings (million tonnes)	Apr.	20.5	76.2	2.5
Steel (ingots — thousand tonnes)	Mar.	1,296	3,589	-4.7

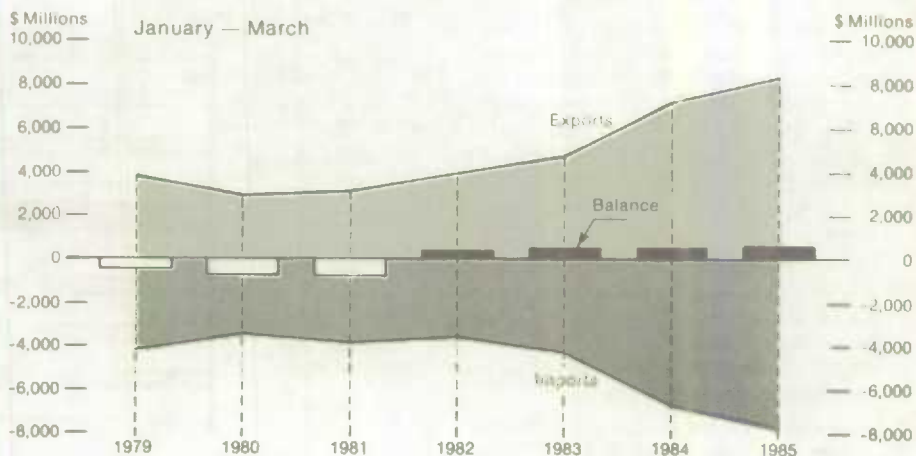
### SALES

Department Store Sales (\$ million)	Apr.*	901.4	3,089.7	6.9
Manufacturers' Shipments (\$ million)	Mar.	20,155.4	56,730.6	4.5
New Motor Vehicle Sales (\$ million)	Apr.	2,029.5	6,126.3	21.5
Retail Sales (\$ million)	Mar.	9,971.9	26,955.2	8.4

Statistics are in current dollars and are not seasonally adjusted.

\* - new this week.

## Canada's Foreign Trade in Automotive Products — All Countries



## ...Foreign Trade

### Source of Passenger Automobile Imports

During the first quarter of 1985, 238,000 cars were imported, an increase of 12.3% from the first quarter of 1984. Of these, 71.3% came from the United States, a gain of one percentage point from last year. Cars from Japan declined slightly in number, thereby reducing its import share from 18.5% last year, to 16.3% this year. Imports from West Germany and France fell sharply, leaving West Germany as the only E.E.C. country with a significant share of the Canadian import market. Imports from other countries increased their market share from 2.1% in the first quarter of 1984 to 7.1% in 1985.

The average price of cars imported during the first quarter, rose 21.4% over last year. Cars from the United States increased 25.0% in price while the average value of a Japanese car rose only 7.3%. The average price is derived by dividing the total value by the total number of units. Changes in the average price may be due to shifts to higher or lower priced models.

Contact G. Blaney (613-990-9647), Trade Information Unit, or John Butterill (613-990-9784), International Trade Division.

### Department Store Sales and Stock

Department stores in Canada reported sales totalling \$901.4 million in April 1985, an increase of 6.9% from a year earlier. Sales were higher in 31 out of 40 departments, with the most notable increases reported in the area of hardware, paints and wallpaper (+30.1%), furniture (+17.3%) and toys and games (+16.9%). Major decreases were recorded in gasoline, oil, auto accessories, repairs and supplies (-17.2%), plumbing, heating and building materials (-14.5%) and piece goods (-8.4%).

Sales by major department stores in April 1985 reached \$549.2 million, up 5.2% from April 1984, while junior department stores had sales of \$352.2 million, up 9.7% over the same period last year.

Adjusted for seasonal variations and the number of trading days, total department store sales in April 1985 decreased 1.5% to \$986.4 million from the revised March 1985 level of \$1,001.3 million. Among the 28 departments recording lower sales, the largest decreases were reported in women's and misses' coats and suits (-13.9%), men's and boys' footwear (-11.9%) and girls' and teenage girls' wear (-8.7%). The most notable increases were recorded in the area of hardware, paints and wallpaper (+14.8%), lamps, pictures, mirrors and all other home furnishings (+4.4%) and furniture (+3.8%).

The unadjusted selling value of inventories held by department stores in April 1985 was \$3,540.7 million, down 1.8% from April 1984. Seasonally adjusted department store stocks, totalled \$3,364.8 million, virtually unchanged from the previous month.

Order the April 1985 issue of Department Store Sales and Stocks (63-002, \$13/\$130), or contact Michael Kwilecki, (613-990-9665), Retail Trade Section, Industry Division.

## Consumer Price Index

### National Highlights

The Consumer Price Index (CPI) for Canada (1981=100) rose 0.2% between April and May to a level of 126.5. In May, a sharp increase in the Tobacco Products and Alcoholic Beverages index, up 2.7%, and higher housing and recreation charges were partially offset by a 0.7% decline in food prices.

The year-to-year increase in the CPI, as measured by comparing the index level for May 1985 to that of May 1984, was 3.9% unchanged from the previous 12 month period ending in April. This marks a full year during which the year-to-year measure of price change has remained within a narrow range around 4.0%.

The Food index declined 0.7% in May as the Food Purchased from Stores index fell 1.1% following a 1.6% increase in April while the Food Purchased from Restaurants index increased 0.2%. Lower prices for fresh produce particularly for fresh vegetables, down 10.2%, and lower prices for most types of meat were the principal contributors to the overall decline in food prices. The net decline in fresh vegetable prices resulted from sharp price declines for tomatoes, cucumbers and cabbage being only partially offset by higher prices for celery and lettuce. In the meat category, there were declines for beef (-3.3%), pork (-1.3%), chicken (-0.9%), cured meat (-0.9%), and meat preparations and ready cooked meats (-1.4%), with turkey prices showing the only increase, rising 11.0% from sale prices observed in April. Other notable changes in food prices were observed for eggs up 2.1%, coffee and tea up 0.9%, sugar down 3.4% and bakery products down 0.6%. The index for Food Purchased from Stores now stands 3.0% above its level of May 1984 while the index for Food Purchased from Restaurants is 4.0% higher than it was in May 1984. The resulting year-to-year increase in the aggregate Food index is 3.3% down from 3.8% in April.

The 0.5% increase in the All-items excluding Food index was largely the result of higher prices for housing and tobacco and alcohol products. Within the Housing index, the increase resulted from higher charges for owned, rented and travel accommodation combined with higher electricity rates, particularly in Charlottetown and in the province of Quebec. A combination of higher prices charged by tobacco manufacturers and higher taxes in five provinces resulted in an increase of 5.5% for the Tobacco Products and Smokers' Supplies index. The Alcoholic Beverages index rose 1.3% largely due to higher prices announced by brewers in a number of provinces. The Recreation index rose 1.0% as higher prices were observed for recreational vehicles. Within the Transportation index, the most notable change was a 4.0% increase in air fares. Between May 1984 and May 1985, the All-items excluding Food index rose 4.1%, up from the 3.8% recorded in April.

On a seasonally adjusted basis, the All-items index increased by 0.4% between April and May, with the Food index declining 0.4% while the All-items excluding Food index rose 0.4%. During the three-month period February to May, the All-items index rose at a seasonally adjusted compounded annual rate of change of 3.6%.

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

### Building Construction

The leading indicator of construction activity in Canada (1981=100) progressed 1.7% in February to 73.2 from 72.0 in January. All components of the index contributed to this increase; this situation had not occurred since July 1984.

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

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

May 1984 to May 1985



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

## Sales of Refined Petroleum Products and Natural Gas

Preliminary figures show that in April 1985, sales of refined petroleum products in Canada increased by 3.6% from a year earlier, while sales of natural gas increased by 2.7%. Cumulative figures for the first four months of 1985 show sales of petroleum products fell 0.1% from the 1984 level, while sales of natural gas were up by 4.3%.

### Refined Petroleum Products

During April 1985, sales of petroleum products by Canadian refiners and major distributors amounted to 6 054 000 cubic metres, up 3.6% from the level recorded in April 1984. Sales of the main products were as follows: motor gasoline, 2 675 600 cubic metres (+5.2%); diesel fuel, 1 093 900 cubic metres (-3.4%); light fuel oil, 639 400 cubic metres (+0.6%) and heavy fuel oil, 503 200 cubic metres (+0.3%). Production of petroleum products by Canadian refiners amounted to 5 784 900 cubic metres, down 8.7% from April 1984.

For the first four months of 1985, sales of refined petroleum products amounted to 25 254 176 cubic metres, down 0.1% from the level recorded during the same period of 1984. Year-to-date sales of the main products were as follows: motor gasoline, 9 993 782 cubic metres (-0.1%); diesel fuel, 4 269 518 cubic metres (+0.7%); light fuel oil, 4 155 107 cubic metres (-5.2%) and heavy fuel oil, 2 349 780 cubic metres (-5.8%). Year-to-date production of petroleum products by Canadian refiners amounted to 26 191 828 cubic metres, down 10.1% from the same period in 1984.

### Natural Gas

During April 1985, sales of natural gas by main distributors amounted to 4 112 567 thousand cubic metres, up 2.7% from the level recorded during April 1984.

## Composite Leading Indicator

The Composite Leading Indicator declined in March, its eighth consecutive drop since last August. The 0.2% decline, in line with the decreases recorded since January and smaller than the drops registered towards the end of last year, brought the index to a level of 155.7. The number of rising components increased from six in February to eight in March. The proxy of profit margins and the real money supply were the two declining components.

*Additional data and further analysis of the Leading Indicator are available in the monthly Current Economic Indicators, (13-005, \$10/\$100). Contact C. Cousineau. For general information, contact D. Rhoades (613-990-9161), Econometric Analysis Division.*

On the basis of rate structure information, sales were broken down as follows: residential sales, 1 137 548 thousand cubic metres (+5.3%); commercial sales, 941 655 thousand cubic metres (+8.6%) and industrial sales, 2 033 364 thousand cubic metres (-1.1%).

For the first four months of 1985, sales of natural gas amounted to 21 367 896 thousand cubic metres, up 4.3% from the level recorded during the same period of 1984.

On the basis of rate structure information, sales were broken down as follows: residential sales, 6 625 983 thousand cubic metres (+4.6%); commercial sales, 5 482 021 thousand cubic metres (+8.6%) and industrial sales, 9 259 892 thousand cubic metres (+1.8%).

*Other preliminary statistics are available on request. Order the April 1985 issues of Refined Petroleum Products (45-004, \$15/\$150) and Gas Utilities (55-002, \$10/\$100), or contact Gerard O'Connor or Gary Smalldridge (613-990-9823), Industry Division.*

## Inventories, Shipments and Orders

### Highlights

- Preliminary estimates show the seasonally adjusted value of shipments in all Canadian manufacturing industries, increased 1.7% to \$19,772.1 million in April from the revised level of \$19,444.8 million in March.
- Seasonally adjusted inventories owned by manufacturers at the end of April were \$33,521.0 million, up 0.1% from the previous month's revised value of \$33,497.1 million.
- The ratio of seasonally adjusted total inventory owned to seasonally adjusted shipments went from 1.72:1 in March to 1.70:1 in April.
- The value of new orders received in April, seasonally adjusted, decreased 0.3% to \$19,506.3 million from the revised March estimate of \$19,569.2 million.
- Not adjusted for seasonal variation, manufacturers' shipments in April 1985 were estimated at \$20,063.7 million, 1.2% lower than the revised March value of \$20,304.1 million. Cumulative shipments for the first four months of 1985, at an estimated \$76,943.0 million, were up 6.0% from the \$72,587.4 million estimated for the same period in 1984.

*Order the April 1985 issue of Inventories, Shipments and Orders in Manufacturing Industries (31-001, \$15/\$150). Preliminary series of shipments data by province in greater detail than normally published may be available on request. Contact J. Lepage (613-990-9832) Industry Division.*

## Help-wanted Index

The seasonally adjusted Help-wanted Index (1981=100) for Canada declined between April and May by 5.4% from 74 to 70. The decrease resulted essentially from a reduced ad volume in the Atlantic provinces.

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

## Persons Working Long Hours

When the topic of hours worked has been addressed in recent studies of Canadian labour markets, the focus has tended to be on the rapid growth in part-time employment. The increasing share of total employment accounted for by part-time work led to a decline in overall average weekly hours worked between 1976 and 1984. This does not, however, necessarily mean a shorter workweek for Canadians in general. In fact, an examination of the average weekly hours of full-time and part-time workers reveals that these have remained virtually unchanged since 1976. On the other hand, long workweeks are increasing in importance both in terms of the number of persons working 50 or more hours per week, and in terms of the share of total employment accounted for by these people.

An article in the May 1985 issue of *The Labour Force*, entitled "Persons Working Long Hours", focuses on the evolution of long workweeks. Some of the article's highlights are:

- In 1984, 1.4 million, or nearly 1 in 8 employed Canadians, routinely put in a workweek of at least 50 hours;
- Between 1976 and 1984, the number of paid workers working long hours increased substantially, from 714,000 to 938,000 (+31.3%);
- The increase in the number of self-employed working long hours (+24,000) amounted to only a small portion of the overall increase in those working long hours (+240,000);
- The number of unpaid family workers working long hours dropped by 8,000 to 22,000 during this period, and their share of the total number of persons working long hours decreased from 2.7% to 1.6%.

*Order the May issue of The Labour Force, (71-001, \$20/\$200), or contact Danny van Cleeff (613-990-9452), Labour and Household Surveys Analysis Division.*

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