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Weekly Bulletin

August 30, 1985

Industry Selling Price Index

Preliminary estimates show that the Industry Selling Price Index (ISPI) for manufacturing (1971=100) stood at 319.5 in July 1985, up 0.2% from the revised level of 318.8 for June. With this increase, the year-over-year advance, calculated by comparing the level for July 1985 with the level for July 1984, fell to 2.1%, maintaining the downward trend that began in December 1984.

The food and beverage industry component index climbed 1.0% in July to a level 1.4% higher than a year before. The monthly advance stemmed from increases in a large number of industries. In particular, there were gains of 0.9% in the slaughtering and meat processors index, 3.8% in the poultry processors index, 4.7% in the confectionery manufacturers index, 2.4% in the soft drink manufacturers index and 2.3% in the breweries index.

The non-metallic mineral products index rose 0.8% in July, up 3.5% from July 1984. The increase for the month was chiefly due to gains of 2.4% in the cement manufacturers index and 1.4% in the miscellaneous non-metallic mineral products index.

The wood industry index dropped 1.1% in July, but remained 5.5% higher than a year earlier. The main stimulus for the monthly decline was a 2.2% decrease in the sawmills and planing mills index. The effect of this decrease on the group index was partly counterbalanced by a 1.8% increase in the veneer and plywood mills index. (Note that any appreciation in the Canadian dollar automatically reduces the Canadian-dollar value, measured by the ISPI, of goods priced in US dollars.)

The paper and allied industries index slipped 0.6% in July, down 2.0% from July 1984. A 0.9% decrease in the pulp and paper mills index was primarily responsible for the downturn in the group index.

In July 1985, the proportion of industry indexes that posted increases declined appreciably, to 48.8% from the average of 55.8% for the previous six months. The percentage of indexes that registered declines (28.4%) was up sharply from the average for the preceding six months (21.1%). The proportion of indexes showing no change (22.8%) was almost the same as the average for the previous six months (23.1%).

Order the July 1985 issue of *Industry Price Indexes* (62-011, \$15/\$150), or contact the Information and Current Analysis Unit (613-990-9606/07), Prices Division.

LATEST MONTHLY STATISTICS

EMPLOYMENT, INCOME

Average Weekly Earnings(\$)	June*	419.47	417.21	2.8
Labour Income (\$ million)	May	20,520.4	20,097.1	6.0
Persons with Jobs (million)	July	11.83	11.62	2.3
Unemployed	July	1,272,000	1,293,000	-4.1

INVENTORIES

Department Store (\$ million)	June	3,292.1	3,517.4	4.6
Manufacturers' Owned (\$ million)	June	33,800.8	33,787.6	4.2

ORDERS

Manufacturers' New Orders (\$ million)	June	21,507.1	21,504.8	5.3
Manufacturers' Unfilled Orders (\$ million)	June	22,887.4	22,607.5	2.5

PRICES

Consumer Price Index (1981 = 100)	July	127.6	127.2	3.8
New House Price Index (1981 = 100)	June	95.6	95.2	0.3
Raw Materials Price Index (1977 = 100)	July*	217.6	222.1	0.1
Excl. coal, crude oil, nat. gas	July*	155.1	157.4	-4.7
Industry Selling Price Index (1971 = 100)	July*	319.5	318.8	2.1

CONSTRUCTION

			Year-do-date	
Building Permits (\$ million)	May	1,743.7	6,831.1	19.9
Housing Starts - Urban Centres (units)	June	13,617	60,872	12.2

ENERGY

Coal Production (thousand tonnes)	Apr.	5 085	20 967	15.2
Electricity Generation (terawatt hours)	Apr.	35 284	158 641	5.9
Natural Gas Production (million cubic metres)	Apr.	771	35 964	12.0
Petroleum Refining (thousand cubic metres)	Apr.	6 027	26 434	-9.3

FOREIGN TRADE

Exports - Balance of Payments Basis (\$ million)	June	10,325	60,311	9.4
Imports - Balance of Payments Basis (\$ million)	June	8,683	50,325	9.5

PRODUCTION

Railway Carloadings (million tonnes)	June	20.4	118.6	1.0
Steel (ingots - thousand tonnes)	June	1 270	7 310	-3.5

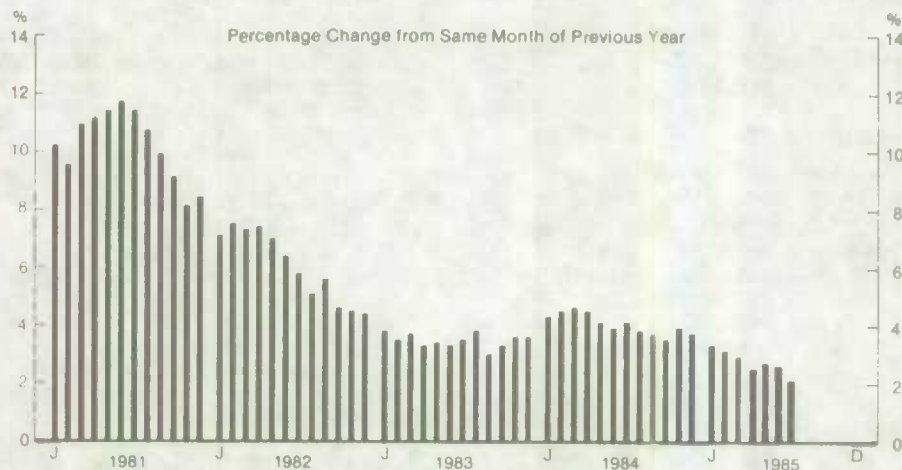
SALES

Department Store Sales (\$ million)	June	928.2	5,008.4	3.7
Manufacturers' Shipments (\$ million)	June	21,227.2	119,433.7	6.0
New Motor Vehicle Sales (\$ million)	June	2,058.6	10,193.2	22.1
Retail Sales (\$ million)	June	11,059.4	60,079.7	9.4

Statistics are in current dollars and are not seasonally adjusted.

* - new this week.

Industry Selling Price Index: Manufacturing (1971=100)



Source: Statistics Canada, Industry Price Indexes (62-011)

Canada

Raw Materials Price Index

The Raw Materials Price Index (RMPI, 1977=100) stood at a preliminary level of 217.6 in July 1985, down 2.0% from a revised June index of 222.1. This is the largest monthly decline since December 1981 when the RMPI fell 3.5%. The year-to-year movement was up only 0.1% this month, the smallest 12-month change posted for the RMPI since it was first calculated in 1977. The Raw Materials Price Index excluding coal, crude oil and natural gas fell 1.5% over the month and was 4.7% lower than 12 months earlier. Of the eight components for which indexes are calculated, six showed price declines, one went up and one remained unchanged.

The coal, crude oil and natural gas component fell 2.4% in July. The index stays, however, 4.2% above its level of one year ago. The main contributor to the monthly decline was a 2.8% drop in the crude oil prices. Thermal coal prices were down 0.5% while natural gas prices showed no change.

The animal and animal products component dropped 3.4% since June and now stands 6.7% lower than its level of July 1984. A sharp decline in cattle and calves prices (-10.7%) and to a lesser extent lower hides and skin prices (-1.6%) were the main reasons for July's marked drop. The impact of these declines was offset somewhat by higher prices for hogs (up 8.5%) and fish (up 4.5%).

The ferrous material component posted a 1.3% price drop this month. Ferrous material prices are now 2.3% lower than a year ago. The movement in July was largely attributed to a 2.1% decline in steel scrap prices.

The vegetable products index was down 0.1% in July. Sharp increases for fresh vegetable prices, which were up 8.5% in total in the month, were offset by substantial declines in prices for oilseeds and raw sugar.

Order the July 1985 issue of *Industry Price Indexes* (62-011, \$15/\$150), or contact Prices Division (613-990-9606/07).

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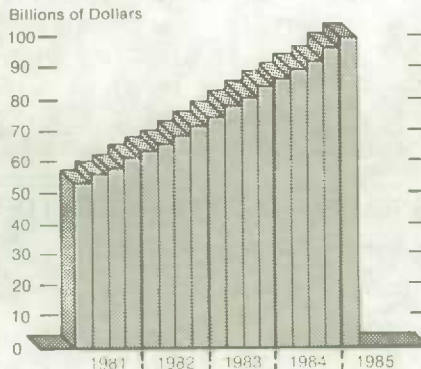
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Trusted Pension Funds

Quarterly Estimates of Assets Held



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

International Travel

Preliminary estimates for the first half of 1985 show that Canada received \$1,734 million from international travel, 8.0% above 1984. Payments by Canadians travelling abroad increased by 6.4% to \$3,754 million. As a result, Canada's deficit on the travel account for the first six months reached \$2,020 million, 5.1% above the equivalent 1984 level.

In the second quarter of 1985, preliminary estimates show Canada had an international travel account deficit of \$580 million, up 2.3% from last year. Receipts from international travel amounted to \$1,216 million, up 8.2% from the second quarter of 1984, while payments by Canadians travelling abroad increased by 6.2% to \$1,796 million.

Order the April-June issue of *Travel Between Canada and Other Countries* (66-001, \$35/\$140), or contact Paul L. Paradis (613-990-8932), International and Financial Economics Division.

Non-residential Construction

The price index for non-residential construction rose to 106.4 in the second quarter 1985, an increase of 1.5% from its previous level of 104.8. With one exception, indexes rose in all cities with increases in eastern cities ranging from 1.1% in Halifax to 2.0% in Toronto. A rise of 1.3% in Vancouver also contributed to the increase, as did an increase of 0.5% in Calgary, this being their first major increase in 11 quarters. Offsetting these increases was a slight decline of 0.2% in Edmonton.

In comparing the second quarter 1985 with the same quarter a year ago, the composite index rose 2.5%, the first four-quarter increase to have occurred since the fourth quarter of 1982. Increases which contributed to this rise, ranged from 0.8% in Vancouver to 5.4% in Toronto and were offset by declines of 2.0% in Calgary and 1.6% in Edmonton.

Order *Construction Price Statistics* (62-007, \$15/\$60), or contact the Prices Division (613-990-9608).

Trusted Pension Funds

Direct investments in stocks by pension funds have increased considerably in recent years. At book value, these investments increased from 18.6% of total assets at the end of 1979 to the current 26.1% or \$25.1 billion.

The book value of the assets have increased 3.1% since December 31, 1984, growing from \$95.8 billion to \$98.8 billion. The bulk of this increase was attributed to investments in bonds (48.4%), followed by investments in stocks (32.9%). The proportion of assets invested in these two vehicles remained unchanged.

Total income for the first quarter of 1985 amounted to \$3.7 billion, whereas expenditures were \$1.238 billion, leaving a net cash flow of \$2.5 billion.

Order the first quarter 1985 issue of *Quarterly Estimates of Trusted Pension Funds* (74-001, \$10/\$40), or contact Hubert Frenken (613-990-9900), Labour Division.

Canadian Universities

Expenditures of Canadian universities reached \$5.5 billion in 1983-84, representing 1.4% of Canada's Gross National Product. At just under 7.0%, the increase in university spending in 1983-84 was the smallest in 10 years. Nova Scotia was the only province in Canada to record a greater increase in university expenditures in 1983-84 than in the previous year. On the other hand, the only province to record a drop was British Columbia (-0.2%) mainly because of lower capital expenditures.

University sponsored research expenditures rose 11.0% to \$738 million in 1983-84 compared to 6.5% for the remaining university operating expenditures.

In 1983-84, two-thirds of university revenues came from provincial governments; just over a tenth came from tuition fees. On a per full-time student basis, revenues from tuition fees rose 5.0% over 1982-83 compared to a 1.0% increase in funds from provincial governments.

Order *Education Statistics, Vol. 7, No. 3: Financial Statistics of Canadian Universities, 1983-84* (81-002, \$4), or contact Francois Gendron (613-991-1508), Education, Culture and Tourism Division.

Electric Power

The net generation of electricity in Canada in May 1985 increased by 1.9% to 33 925 gigawatt hours from 33 286 gigawatt hours a year earlier. Exports of electric power increased 9.9% to 3 634 gigawatt hours from 3 306 gigawatt hours, and imports increased by 105.4% to 479 gigawatt hours from the May 1984 level of 233 gigawatt hours.

During 1985, the net generation of electricity totalled 192 535 gigawatt hours, up 5.2% from the January to May 1984 level of 183 086 gigawatt hours. Exports of electricity rose 3.0% to 16 148 gigawatt hours from 15 675 gigawatt hours and imports rose 29.8% to 1 424 gigawatt hours from 1 097 gigawatt hours.

Order the May 1985 issue of *Electric Power Statistics* (57-001, \$8/\$80), or contact Dave Madsen (613-991-3565), Industry Division.

Employment and Earnings

Preliminary data show an estimated 9,116.7 thousand employees for the Canada industrial aggregate, an increase of 54.6 thousand from May to June 1985. Gains were noted in forestry; mining; manufacturing; construction; and transportation, communication and other utilities, while there were no significant changes in the remaining industry groups. All provinces registered moderate increases.

Average weekly earnings at the Canada industrial aggregate level were estimated at \$419.47 for June, an increase of 0.5% from May. The major changes were observed in mining (-1.0%) and community, business and personal services (+1.3%). The provinces of Ontario, Manitoba, British Columbia and the Northwest Territories recorded increases while the Yukon declined. The remaining provinces showed little change.

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

Union Wages

The Canada total Union Wage Rate Index (1981=100) for the construction trades (including supplements) increased 0.1% in July to 132.1 from June's level of 132.0. This change resulted solely from an increase of 2.3% in the index for Saint John rising from increases of about 4.0% in rates for carpenters, electricians and plumbers. All other city indexes remained unchanged.

On a year-over-year basis, the Canada total level rose 3.3%. On a city basis, the largest annual increase was reported in Halifax (12.6%). Cities in Quebec, Ontario and British Columbia increased 4.4% on average. Saint John advanced 3.8% while the Winnipeg index rose 2.0%. Cities in Saskatchewan and Alberta reported no change. The index for St. John's posted a decrease of 9.8%.

Order the second quarter 1985 issue of **Construction Price Statistics** (62-007, \$15/\$60), or contact Lisa-Gay Tremblay (613-990-9601), Prices Division.

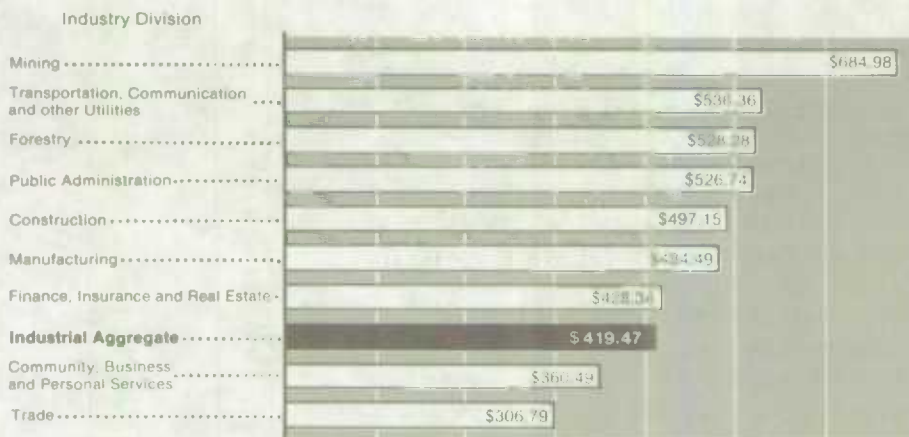
Crude Petroleum and Natural Gas Production

During May 1985, preliminary figures on the production of crude oil and equivalent hydrocarbons amounted to 7 700.1 thousand cubic metres, up 4.5% from the previous year. Exports rose 17.5% to 2 488.1 thousand cubic metres, while imports increased 64.4% to 1 560.6 thousand cubic metres. Canadian refinery receipts of crude oil totalled 6 863.6 thousand cubic metres, up 5.2% from May 1984.

Preliminary figures show net withdrawals of natural gas reached 7 242.3 million cubic metres in May 1985, up 7.5% from last year. Marketable production of natural gas after treatment at processing plants amounted to 5 676.0 million cubic metres, up 7.1%, while net withdrawals of natural gas liquids (propane, butanes and ethane) reached a preliminary total of 1 136.2 thousand cubic metres, up 5.1% from

Average Weekly Earnings in Canadian Industry

June 1985 *



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

* Preliminary Estimates

Wholesale Trade

Sales

Wholesale merchants' sales rose at a somewhat more moderate rate in June 1985, advancing 10.1% over the same period last year. Revised sales for May 1985 were up 12.7% from the May 1984 level.

In June 1985, all major trade groups, with the exception of lumber and building materials (-1.4%), registered increased sales from a year earlier. The most notable gains were reported by the following major trade groups: farm machinery, equipment and supplies (+33.0%); tobacco, drugs and toilet preparations (+19.0%); and motor vehicles and accessories (+19.0%). All regions posted sales increases from a year earlier, ranging from 14.6% in Ontario to 3.5% in Quebec.

Cumulative sales by wholesale merchants for the first six months of 1985 were up a robust 10.6% over the January-June 1984 period. Significant gains were reported by wholesalers of metals, hardware, plumbing and heating equipment (+17.7%); other machinery, equipment and supplies (+17.2%); and motor vehicles and accessories (+16.8%).

Inventories

Wholesale inventories in June 1985 increased by 5.9% from the corresponding period in 1984. Revised inventories for May 1985 were up 5.3% from the May 1984 level. The ratio of inventories to sales at the end of June 1985 was 1.49:1, down from 1.55:1 a year earlier.

Order the June 1985 issue of **Wholesale Trade** (63-008, \$5/\$50), or contact Gilles Berniquez (613-991-3537), Industry Division.

May 1984. Exports of natural gas amounted to 2 019.5 million cubic metres, up 25.1%, while sales in Canada decreased 5.3% to 3 195.3 million cubic metres.

Order the May 1985 issue of **Crude Petroleum and Natural Gas Production** (26-006, \$8/\$80), or contact Gerard O'Connor (613-991-3562), Industry Division.

Airport Activity

The total number of scheduled passengers that enplaned and deplaned at the top 10 Canadian airports totalled 2,846,429 in November, down 0.7% from last year. However, an increase was recorded for the month of December. A total of 2,955,498 passengers were registered, up of 4.8% from the same period a year earlier.

During the month of November 1984, only four of the top 10 airports showed increases in traffic relative to the previous year, the gains ranging from 1.5% at Montreal International (Dorval) to 13.8% at Edmonton Municipal. No change was reflected at Halifax International. Five airports in the top 10 showed decreases; these ranged from 9.2% at Winnipeg International to 2.9% at Ottawa International.

During the month of December 1984, eight of the top 10 airports showed increases in traffic relative to the previous year, the gains ranging from 2.7% at both Calgary International and Edmonton Municipal to 11.8% at Mirabel International. The two airports in the top 10 which showed decreases were Edmonton International, down 0.6% and Winnipeg International, down 0.2%.

Order the September 1985 issue of the **Aviation Statistics Centre Service Bulletin** (51-004, \$8.50/\$85), or contact L. Di Pietro (819-997-1386), Transportation Division.

Major Grains

Producer deliveries of major grains by Prairie farmers during July 1985, were as follows (in thousand metric tonnes):

• Wheat (excluding durum),	1 417.4
• Durum wheat,	24.0
• Total Wheat,	1 441.4
• Oats,	34.9
• Barley,	478.6
• Rye,	66.7
• Flaxseed,	31.0
• Canola (rapeseed),	237.5

Order the July 1985 issue of **Cereals and Oilseeds Review** (22-007, \$10/\$100), or contact Allister Hickson (204-949-2856), Agriculture and Natural Resources Division.



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	Catalogue No.	In Canada Price per issue/year	Elsewhere Price per issue/year
AGRICULTURE/NATURAL RESOURCES			
Cereals and Oilseeds Review, June 1985	22-007	\$10/\$100	\$11/\$110
Farm Cash Receipts, January-June 1985	21-001	\$7/\$70	\$8/\$80
Field Crop Reporting Series, No. 5: Stocks of Grain at July 31, 1985	22-002	\$7/\$48	\$8/\$54
Index Numbers of Farm Prices of Agricultural Products, June 1985	62-003	\$6/\$60	\$7/\$70
CANADIAN CENTRE FOR JUSTICE STATISTICS			
Juristat, Vol. 5, No. 2: Manpower, Resources and Costs of Courts and Criminal Prosecutions in Canada, 1983-1984	85-002	\$2/\$10	\$3/\$15
ECONOMETRIC ANALYSIS			
Current Economic Indicators, Vol. 1, No. 7, August 1985	13-005	\$10/\$100	\$11/\$110
EDUCATION, CULTURE AND TOURISM			
Education Statistics, Vol 7, No. 3: Financial Statistics of Canadian Universities, 1983-1984	81-002	\$4/\$40	\$5/\$50
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Construction Type Plywood, June 1985	35-001	\$4/\$4	\$5/\$50
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Production and Sales of Phonograph Records and Pre-recorded Tapes in Canada, May 1985	47-004	\$4/\$40	\$5/\$50
Production and Shipments of Steel Pipe, Tubing and Fittings, June 1985	41-011	\$4/\$40	\$5/\$50
Pulpwood and Wood Residue Statistics, June 1985	25-001	\$5/\$50	\$6/\$60
Quarterly Report on Energy Supply-Demand in Canada, Fourth Quarter 1984	57-003	\$25/\$100	\$26.50/\$106
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Steel Wire and Specified Wire Products, June 1985	41-006	\$4/\$40	\$5/\$50
INTERNATIONAL TRADE			
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Summary of Canadian International Trade, June 1985	65-001	\$15/\$150	\$16/\$160
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Passenger Bus and Urban Transit Statistics, June 1985	53-003	\$6.50/\$65	\$7.50/\$75
Railway Carloadings, 10-day Period Ending July 31, 1985	52-005	\$75	\$100
Railway Carloadings, 7-day Period Ending August 7, 1985	52-005	\$75	\$100
Water Transportation, 1983	54-205	\$32	\$33

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