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Weekly Bulletin

September 13, 1985

## Financial Market Activity

Funds raised on conventional credit markets by domestic non-financial sectors amounted to \$16.0 billion in the second quarter of 1985. This figure represented 14.4% of the value of goods and services produced in the quarter.

Non-financial private corporations registered the largest single drop. Whereas in the first quarter this sector accounted for almost 39% of the funds raised (some \$8.3 billion in the second quarter), the share had fallen back to 13% or \$2.1 billion, virtually unchanged from the equivalent period the year earlier.

In contrast to non-financial private corporations, the household sector (persons and unincorporated business) increased its borrowings by \$5.1 billion, up from \$2.6 billion in the previous quarter, but remained at about the same level as in the same period in 1984. Consumer credit rose sharply, in line with increased consumer expenditures on durables in the quarter. The increase of \$2.1 billion was the largest in six years. Net new mortgage funds amounted to \$3.4 billion, consistent with the pattern of the past several years of strength in this instrument in the second quarter. The financing activity appeared to reflect existing housing sales as much as new housing. Non-consumer credit bank loans registered a drop of \$0.4 billion, being largely repayments of loans to purchase Canada Savings Bonds.

Borrowing by general government amounted to \$9.3 billion. These borrowings were up from \$8.7 billion in the previous quarter and \$8.1 billion in the second quarter of 1984, reflecting the higher deficit of \$11.8 billion (of which the federal government's share was \$9.2 billion - 8.3% of GNE). The federal government raised \$4.1 billion through the issue of treasury bills, and \$4.8 billion from the sale of marketable bonds while \$1.3 billion in Canada Savings Bonds were redeemed. The federal government also repaid U.S. \$750 million to non-resident banks, being part of the stand-by credit to supplement the international reserves. A further U.S. \$100 million was borrowed from Canadian chartered banks for this purpose. On top of this, the Government of Canada assumed \$774 million of the debt of Canadair Financial Corporation, of which U.S. \$297 million was repaid by drawing down the international reserves.

Contact John Joice, Gerry Gravel or Christian Lajule (613-990-9043)  
International and Financial Economics Division.

## LATEST MONTHLY STATISTICS

### EMPLOYMENT, INCOME

		Previous Month	% Change From Year Ago
Average Weekly Earnings(\$)	June	419.47	2.8
Labour Income (\$ million)	June	21,176.8	6.1
Persons with Jobs (million)	Aug.*	11.83	2.7
Unemployed	Aug.*	1,253,000	-7.0

### 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)	July	95.9	95.6	0.7
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-to-date	
Building Permits (\$ million)	June	1,638.9	8,628.7	19.3
Housing Starts - Urban Centres (units)	July	12,690	73,362	14.6

### 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)	July*	8,425	68,736	6.9
Imports - Balance of Payments Basis (\$ million)	July*	8,659	59,234	10.7

### PRODUCTION

Railway Carloadings (million tonnes)	July*	19.5	138.3	0.6
Steel (ingots - thousand tonnes)	June	1 270	7 310	-3.5

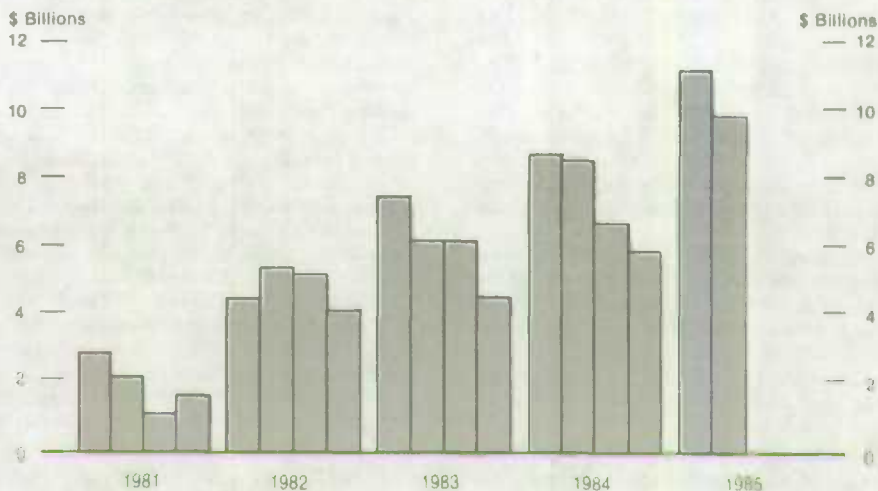
### SALES

Department Store Sales (\$ million)	July*	875.7	5,884.1	4.4
Manufacturers' Shipments (\$ million)	June	21,227.2	119,433.7	6.0
New Motor Vehicle Sales (\$ million)	July*	1,610.1	11,803.3	22.8
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.

## Federal Government Borrowings



Source: Statistics Canada, Financial Flow Accounts (13-002)

Canada



## International Trade

### Month-to-Month

On a seasonally adjusted balance of payments basis, preliminary estimates of Canadian exports during the month of July indicate a value of \$8.8 billion, a drop of 9.1% or \$872 million from June. It was the lowest value since February 1984 and represents a decline of 15.4% from the record value set in March of this year.

Imports during July remained virtually flat at a level of \$8.7 billion. As a result of the decline in exports, the merchandise trade surplus fell to \$148 million in July, compared to \$1,001 million in June. It was the smallest surplus since April 1980.

### Short-term Trend

The short-term trend for exports has dropped steadily since April of this year. Short-term trends have declined in every major category, but the strongest downward movements have occurred in the energy sector. In contrast to exports, the short-term trend for imports continued to rise.

### Commodity Analysis

The drop in exports in July of \$872 million was widely spread. Exports of crude materials dropped 11.0% due to lower exports of crude petroleum (down 26.3%), natural gas (down 9.2%) and metal ores (down 19.7%). Exports of refined petroleum and coal products fell 32.8% while exports of chemical products fell 22.4%, contributing to an overall drop of 8.4% for fabricated materials. End products dropped 8.6%, mostly in automobiles (down 8.5%), trucks and other vehicles (down 28.6%) and aircraft (down 26.1%). Exports of wheat fell 35.5% to \$170 million, the lowest value since 1979.

Sharp drops were recorded for imports of crude petroleum (down 37.2%) and for refined petroleum products (down 68.4%), after being stockpiled during the second quarter to take advantage of deregulation of the industry and the cessation of the compensation programs on June 1st. This decline was offset by an increase of 5.7% in end products, due to a 5.3% increase in auto motive parts and a near doubling (93.7%) of aircraft. Imports of precious metals rose 84.1%.

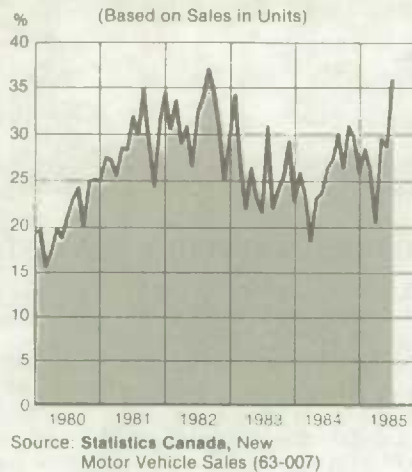
### Trading Partner Analysis

Three-quarters of the decline in total exports was attributable to a drop of \$651 million in exports to the United States. The drop was due in part to continued slow growth in the U.S. but also reflected a slow-down in shipments of automotive products associated with a U.S. trucking strike in July. Exports to the United Kingdom fell by over one-third to \$146 million, the lowest monthly value since 1978. Exports to non-O.E.C.D. countries dropped 22.5% to \$606 million.

Imports from the United States rose fractionally to \$6.2 billion. Imports from the United Kingdom remained at record levels, having doubled since March due to imports of crude oil, while imports from other E.E.C. countries fell \$91 million, returning to the May level. Imports from non-O.E.C.D. countries fell \$191 million.

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

## Share of Canadian New Car Market Held by Overseas Manufacturers



## Help-wanted Index

The seasonally adjusted Help-wanted Index (1981=100) for Canada advanced almost 10% from 72 to 79 between July and August 1985.

The August index increased 18.8% in the Atlantic Provinces (117 to 139), 11.1% in Quebec (81 to 90) and 7.9% in Ontario (89 to 96). No changes were recorded in the Prairie Provinces (44) and British Columbia (33). All indices were above the level of August 1984; the annual advances ranged from 12.1% in the Atlantic Provinces to 41.2% in Ontario.

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

## Security Transactions

Foreign investment in outstanding Canadian securities produced a net capital inflow of \$435 million in July, some \$100 million less than in June. Net sales of outstanding Canadian bonds to non-residents amounted to \$306 million, down from \$401 million. There was a sharp increase in investments from Europe and Japan in July, in contrast to the previous month when investors from the United States accounted for the bulk of the foreign investment in Canadian bonds. While bond trading activity with United States residents remained high at \$900 million, there was no change in overall holdings.

Trading with non-residents in outstanding Canadian equities resulted in a net capital inflow of \$128 million, the same as in June. These investments continued to be largely from the United States.

Canadian residents reduced their holdings of outstanding foreign securities by \$141 million in July, which included a reduction of \$76 million in foreign equities and a reduction of \$65 million in bonds.

Order the July 1985 issue of *Security Transactions with Non-residents* (67-002, \$15/\$150), or contact J. Motala (613-990-9051), International and Financial Economics Division.

## New Motor Vehicle Sales

Sales of all new motor vehicles reached 123,904 units in July 1985, up 18.3% over July 1984. Compared to July 1984, sales of North American manufactured passenger cars decreased by 0.6% to 58,674 units, while those of commercial vehicles rose by 33.9% to 27,994 units over the same period. Sales of passenger cars built overseas rose by 55.6% to 33,037 units, while sales of overseas-built commercial vehicles increased by 17.9% to 4,199 units. For overseas-built passenger cars, this comprised increases of 29.0% for Japanese automobiles (18,562 units) and 111.7% for passenger cars imported from other countries (14,475 units).

The share of the Canadian passenger car market held by North American manufacturers in July 1985 (based on unit sales) was 64.0%, sharply down from the 73.6% recorded in July 1984. Japanese manufacturers held a market share of 20.2% compared to 17.9% a year earlier. Manufacturers from other countries held 15.8% of the passenger car market, a substantial increase from the 8.5% held in July 1984.

The total dollar value of all new motor vehicles sold in July 1985 increased by 27.7% from a year earlier to \$1,610.1 million. Sales of North American passenger cars reached \$713.0 million, up 7.5% over the corresponding month in 1984. The total sales of commercial vehicles built in North America amounted to \$461.2 million, up 46.5%. Sales of overseas passenger cars rose 59.7% to \$390.4 million, while sales of commercial vehicles increased 20.0% to reach \$45.5 million.

Total sales in units reported for the first seven months of 1985 increased 16.2% over the same period last year to reach 923,994 units, valued at \$11,803.3 million, a gain of 22.8%.

Order the July 1985 issue of *New Motor Vehicle Sales* (63-007, \$8/\$80), or contact Michael Kwilecki (613-991-3549), or Lina Di Pietro (613-990-9824), Industry Division.

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## Weekly Bulletin

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## The Labour Force

### Employment

The seasonally adjusted estimate of employment for the week ending August 17, 1985 was 11,337,000, an increase of 25,000 from the level of the previous month. Employment gains were restricted to modest increases of 11,000 among females aged 15 to 24 and of 14,000 for males 25 and over. Overall, employment levels rose to 2,407,000 for persons aged 15 to 24 and to 8,930,000 for those aged 25 and over.

Full-time employment increased by an estimated 22,000, to a level of 9,586,000. Part-time employment levels declined by 13,000 to 1,738,000.

### Unemployment

The seasonally adjusted level of unemployment remained virtually unchanged in August 1985, declining by 7,000 to 1,307,000. There was no significant change in the estimate of unemployment among persons aged 15 to 24 (455,000) or for those aged 25 and over (852,000).

### Unemployment Rate

The seasonally adjusted unemployment rate declined by 0.1 to 10.3 in August 1985. The rate decreased by 0.2, to 15.9 for persons aged 15 to 24, while it remained unchanged at 8.7 for those aged 25 and over.

The unemployment rate declined by 0.8 to 20.5 in Newfoundland, by 0.3 to 11.4 in Quebec, and by 0.4 to 13.6 in British Columbia. The rate rose by 0.8 to 13.0 in Prince Edward Island, by 0.2 to 14.5 in Nova Scotia, by 0.2 to 8.6 in Manitoba, by 0.3 to 8.2 in Saskatchewan and by 0.2 to 9.7 in Alberta. It remained unchanged at 15.5 in New Brunswick, and 8.0 in Ontario.

### Participation Rate

The seasonally adjusted participation rate rose by 0.1 to 65.2 in August 1985. The rate increased by 0.3 to 67.6 among persons aged 15 to 24, with similar gains for both males and females in this age category. The participation rate remained at 64.5 for persons aged 25 and over in August.

### Employment/Population Ratio

The seasonally adjusted employment population ratio was unchanged at 58.4 in August, 1985. The ratio increased by 0.5 to 56.9 for persons in the 15 to 24 age category. It rose by 0.6 for females in this age group and by 0.3 for males. The ratio remained unchanged at 58.9 for those aged 25 and over.

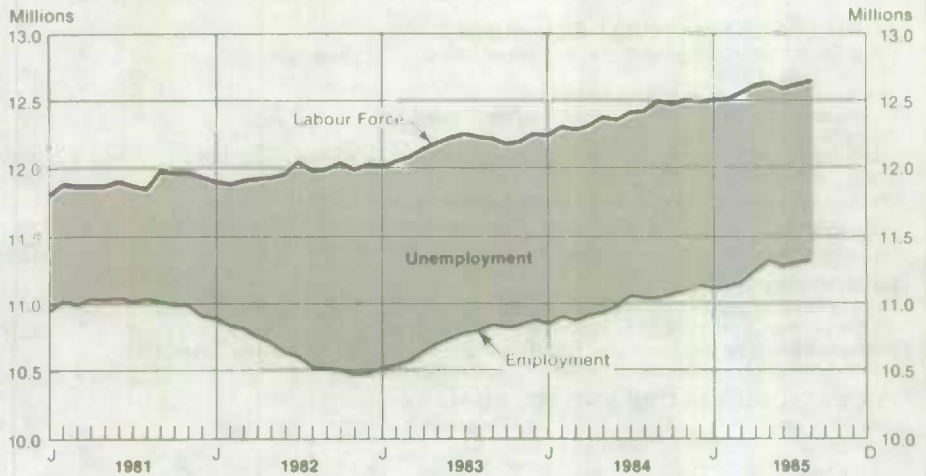
### Unadjusted Data

The unadjusted estimate of employment for August 1985 was 11,825,000, an increase of 310,000 (+2.7%) over the level of the previous year. Unemployment was estimated at 1,253,000, a decrease of 94,000 (-7.0%) below the level of last August. The unemployment rate was 9.6 this month, 0.9 lower than the rate of last year. The participation rate was 67.4 this August, 0.3 above the rate of a year ago. The employment/population ratio was 61.0 this month, 1.0 above the ratio recorded in August, 1984.

Order the August 1985 issue of *The Labour Force* (71-001, \$20/\$200), or contact Ken Bennett (613-990-9448), Household Surveys Division. For summary information, available the day of release, order *Labour Force Information* (71-001P, \$5/\$50).

## The Labour Force

(Seasonally Adjusted)



Source: Statistics Canada, The Labour Force (71-001)

## Farm Cash Receipts

Farm cash receipts for the period January-July 1985 reached an estimated level of \$11,331.9 million, up 0.5% from the revised January-July 1984 estimate of \$11,277.7 million.

Receipts from the sale of field crops were estimated at \$5,486.6 million, an increase of 1.2% over last year's estimate of \$5,421.3 million. Cash receipts from the sale of livestock and livestock products at \$5,518.9 million, showed little change when compared with the same period one year ago. Other cash receipts were down 4.3% to \$326.4 million from the year-earlier total of \$340.9 million.

Order the January-July 1985 issue of *Farm Cash Receipts* (21-001, \$7/\$70), or contact Lambert Gauthier (613-990-8706), Agriculture and Natural Resources Division.

## Production of Principal Field Crops

Canadian production of the seven major grains, including grain corn, is estimated at 48.1 million tonnes, up 5% over 1984.

Western wheat production is estimated to be 20.4 million tonnes, virtually unchanged from 1984. A 4% expansion in seeded area combined with improved yields in Manitoba and northern Saskatchewan offset drought losses in southern Saskatchewan and Alberta generally. Durum wheat production, concentrated in the southern prairies where dry conditions are most acute, dropped 12% from last year. Prospective durum yield is lower than the 1984 yield, the lowest since 1967.

Western Canadian production of barley is estimated at 10.4 million tonnes, up 13% from 1984. A 7% increase in barley plantings more than compensated for reduced Alberta yields. Western production of oats is up 4%.

Western Canadian production of canola-rapeseed is estimated at 3 150 thousand tonnes, a 6% decrease from 1984. Flaxseed production is expected to total 904 thousand tonnes, up 30% over last year and the highest since 1970.

## International Travel

### Total Travellers

Preliminary statistics show that an estimated 5.5 million United States residents entered Canada during July 1985, up 2.5% from July 1984. Visitors from other countries decreased by 9.5% to 306,300 in July. Canadian residents re-entering the country following visits to the United States totalled 4.5 million, up 7.0% from July 1984. Canadians returning from visits to all other countries increased by 13.2% to 186,700.

### Estimation of Tourists

Preliminary data show that long-term tourist entries (by auto and bus for one night or longer and all entries by boat, plane and train) from the United States increased by 2.6% to 2.3 million in July 1985. Residents of other countries - excluding those arriving by land via the United States and intending to stay less than 24 hours - numbered 278,900, down 8.3% from last year. Canadian tourist re-entries from the United States numbered 1.5 million during July, up 5.9%, while residents returning from countries other than the United States increased by 13.2% to 186,700.

Order the July 1985 issue of *International Travel-Advance Information* (66-001P, \$5/\$50), or contact Paul L. Paradis (613-990-8932), International and Financial Economics Division.

Ontario growers anticipate grain corn production of 5 550 thousand tonnes, up 3% from the 1984 record production. Soybean production is expected to reach an unprecedented 1 029 thousand tonnes, 10% more than last year's record. The winter wheat crop just harvested will amount to a record 971.6 thousand tonnes with a record yield of 68 bushels per acre.

Quebec grain corn production, a record, is forecast to increase by 11% from 1984. Barley is expected to increase by 28% while oats will decrease by 11%.

Contact the Crops Section, Agriculture and Natural Resources Division (613-990-8717).





# **PUBLICATIONS RELEASED SEPTEMBER 6 - 12**

## **AGRICULTURE/NATURAL RESOURCES**

Field Crop Reporting Series, No. 6: August Estimate of Production of Principal Field Crops, 1985  
Greenhouse Industry, 1983 and 1984  
Production and Stocks of Eggs and Poultry, June 1985  
Shorn Wool Production, 1985  
Stocks of Food Commodities in Cold Storage and Other Warehouses, 1984  
Stocks of Frozen Meat Products, August 1985  
Stocks of Fruit and Vegetables, August 1, 1985

## **CANSIM**

Canadian Statistical Review, August 1985

## **DEMOGRAPHY**

Postcensal Annual Estimates of Population for Census Divisions and Census Metropolitan Areas, June 1, 1983 (Component Method)  
Postcensal Annual Estimates of Population for Census Divisions and Census Metropolitan Areas, June 1, 1984 (Regression Method)

## **EDUCATION, CULTURE AND TOURISM**

Culture Communiqué, Vol. 8, No. 6: The Recording Industry, 1983  
Teachers in Universities, 1983-84

## **HEALTH**

Vital Statistics Quarterly, January-March 1985

## **HOUSEHOLD SURVEYS**

Labour Force Information, August 1985

## **INDUSTRIAL ORGANIZATION AND FINANCE**

Industrial Corporations: Financial Statistics, Second Quarter 1985

## **INDUSTRY**

Asphalt Roofing, July 1985  
Corrugated Boxes and Wrappers, July 1985  
Department Store Sales and Stocks, June 1985  
Department Store Sales by Regions, July 1985  
Gypsum Products, July 1985  
Mineral Wool including Fibrous Glass Insulation, July 1985  
Oils and Fats, July 1985  
Particleboard, Waferboard and Hardboard, July 1985  
Primary Iron and Steel, June 1985  
Production and Sales of Phonograph Records and Pre-recorded Tapes in Canada, July 1985  
Production and Shipments of Blow-moulded Plastic Bottles, Quarter Ended June 30, 1985  
Production, Shipments and Stocks on Hand of Sawmills East of the Rockies, June 1985  
Quarterly Shipments of Office Furniture Products, Quarter Ended June 30, 1985  
Refined Petroleum Products, May 1985  
Rigid Insulating Board, July 1985  
Specified Domestic Electrical Appliances, July 1985

## **INDUSTRY MEASURES AND ANALYSIS**

Gross Domestic Product by Industry, May 1985

## **INTERNATIONAL AND FINANCIAL ECONOMICS**

Financial Flow Accounts, Second Quarter 1985

## **INTERNATIONAL TRADE**

Imports by Countries, January-June 1985  
Preliminary Statement of Canadian International Trade, July 1985

## **LABOUR**

Quarterly Estimates of Trusteed Pension Funds, First Quarter 1985  
Unemployment Insurance Statistics, June 1985

## **PRICES**

Construction Price Statistics, Second Quarter 1985  
Consumer Prices and Price Indexes, April-June 1985  
Farm Input Price Index, Second Quarter 1985

## **SCIENCE, TECHNOLOGY AND CAPITAL STOCK**

Housing Starts and Completions, June 1985  
Science Statistics, Vol. 9, No. 9: Federal Government Personnel Engaged in Scientific and Technological Activities, 1977-78 to 1985-86  
Science Statistics, Vol. 9, No. 10: R & D in the Petroleum Industry, 1986 Estimate

## **SERVICES**

Radio and Television Broadcasting, 1984  
Telephone Statistics, May 1985

## **TRANSPORTATION**

Air Carrier Operations in Canada, October-December 1983

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63-004	\$2/\$20	\$3/\$30
44-003	\$4/\$40	\$5/\$50
44-004	\$4/\$40	\$5/\$50
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13-002P	\$10/\$40	\$11/\$44
65-006	\$75/\$300	\$85/\$340
65-001P	\$5/\$50	\$6/\$60
74-001	\$10/\$40	\$11/\$44
73-001	\$12/\$120	\$13/\$130
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