

I·N·F·O·M·A·T

A W E E K L Y R E V I E W

Friday, November 21, 1986

OVERVIEW

■ Manufacturing Shipments Continue to Fluctuate

A slight increase in the September value of shipments was primarily due to the transportation equipment industries. But generally, total shipments are following a downward trend.

■ CPI Rise Slightly Higher Than 1986 Trend

October's 4.4% year-to-year increase was up from the 4.1% average increase for the first nine months of 1986.

■ Retail Trade Remains Strong

Retail sales, which have risen throughout 1986, accelerated in the third quarter, increasing an average of 1.4% each month.

■ Employment Prospects Better for University Graduates

1982 university and college graduates had a lower rate of unemployment two years after graduation, and a shorter search for work than trade/vocational graduates.

■ Leading Indicator Registers Moderate Advance

The 0.3% August increase signals sustained economic growth at current rates.

■ Births in 1985 Little Changed From Year-earlier Level

The marginal decrease (-0.3%) in live births marked only the second deviation in a 12-year uptrend.

■ This issue also includes information on Building Permits and Occupational Trends Among Women

Manufacturing Shipments

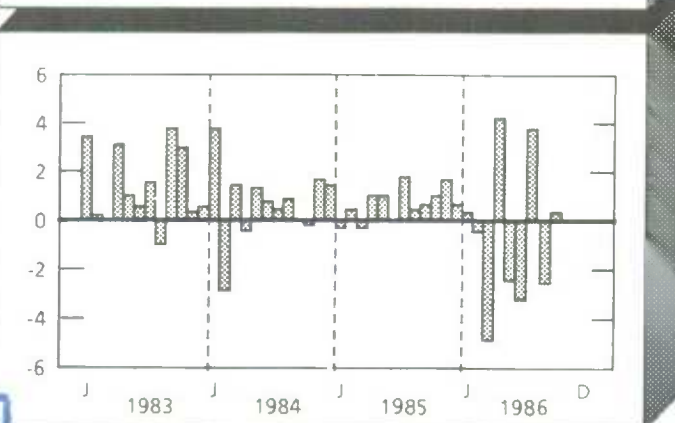
In September, total manufacturing shipments continued to fluctuate about the generally downward trend which has been observed since the beginning of 1986. Following a decline of 2.6% in August, the seasonally adjusted value of shipments increased 0.4%, to \$20.3 billion in September. Despite this increase, shipments were 5.5% lower than the January peak.

The advance in September was primarily due to a marked improvement by the transportation equipment industries which rose 9.8%. Shipments by the transportation equipment industries, which accounted for 18% of total shipments in 1985, have declined steadily throughout 1986. In the last three quarters of 1985, shipments by these industries grew consistently, reaching a peak of \$4.1 billion. The value of shipments in September was \$3.5 billion, 13.6% lower than the November 1985 peak.

(continued on page 2)

Shipments

(% change, previous month)



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... Manufacturing Shipments

The value of new orders also continued to fluctuate. Following a 4.8% decrease in August, the seasonally adjusted value of new orders rose 2.4% to \$20.2 billion. Compared to levels attained at the beginning of 1986, new orders still remain low.

Manufacturing Activity

	May	June	July	Aug.	Sept.
	% change, previous month				
Shipments	-2.5	-3.3	3.8	-2.6	0.4
New orders	-1.8	-4.1	4.0	-4.8	2.4
Unfilled orders	0.4	-0.3	-0.2	-2.0	-0.4
Inventory to shipments ratio	1.64	1.70	1.64	1.68	1.68

The backlog of unfilled orders decreased 0.4%, the fourth consecutive decline. Standing at \$24.0 billion, unfilled orders reached their lowest level since November 1985. Inventories owned by manufacturers totalled \$34.1 billion, marking the sixth month they have remained about the same level.

Not adjusted for seasonal variation, manufacturers' shipments were slightly lower than they were in September 1985. Cumulative shipments for the first three quarters were 3.2% higher than in the corresponding period of 1985.

For further information, contact Industry Division at (613) 990-9832.

Consumer Price Index

In October, the year-over-year increase in the Consumer Price Index (1981=100) was 4.4%, up slightly from the average year-over-year advance (4.1%) for the first nine months of the year. The combined effect of increases in five of the major component indexes and a marginal decline in the clothing index pushed the total CPI up 0.5% during the month. A large part of this rise was due to advances in the housing, food and recreation, reading and education indexes.

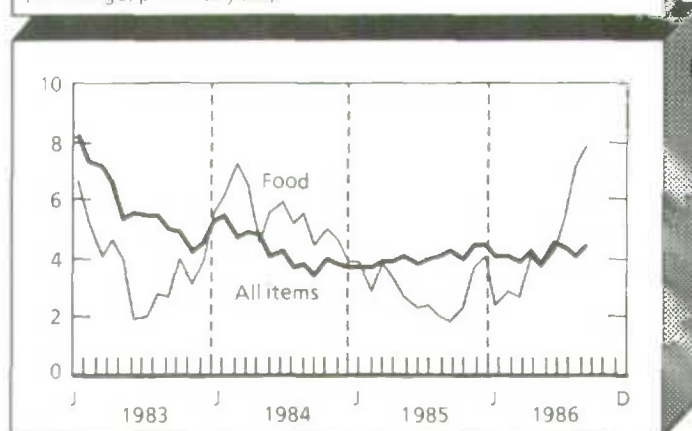
The housing index advanced by 0.9%. An increase in the shelter index was largely due to a 6.4% increase in property taxes. (Property taxes are normally collected between March and October and are included in the October CPI, except for the school tax portion in the province of Québec which is included in the April CPI.) Also new housing prices continued to rise, most notably in the Toronto area.

Consumer Price Index

	June	July	Aug.	Sept.	Oct.
	% change, previous month				
All-items	0.2	0.8	0.3	0.0	0.5
Food	0.2	1.3	0.4	0.5	0.4
All-items, excl. food	0.1	0.6	0.3	-0.1	0.6
Energy	-0.4	-0.2	-0.4	-1.5	-0.7
All-items, excl. energy	0.2	0.8	0.4	0.2	0.6
All-items, excl. food & energy	0.2	0.7	0.4	0.0	0.7

Consumer Price Index

(% change, previous year)



Between September and October, the food index rose 0.4%, marginally lower than the 0.5% increase registered in September. Higher prices for fresh vegetables, meat products and soft drinks were largely responsible for this increase. Over the 12-month period ending in October 1986, the food index advanced by 7.9%. For the first ten months of 1986, year-over-year increases averaged 4.5%.

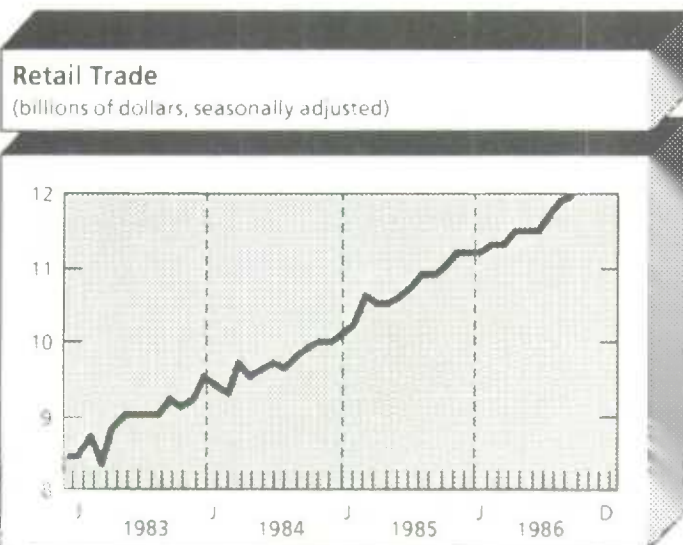
For the second consecutive month, the recreation, reading and education index rose by 0.8%. Much of the latest advance was due to increases in annual memberships, fees for sports facilities, ticket prices for live stage performances, and toy prices.

For further information, contact Prices Division (613) 990-9606.

Retail Trade

Adjusted for seasonal fluctuation and the number of trading days, retail sales in September rose for the third consecutive month to \$12 billion, an increase of 1.2% over the previous month. This increase was mainly attributable to a 6.4% advance in sales by motor vehicle dealers.

Excluding new and used motor vehicle dealers, retail trade actually declined 0.3% in September, following gains of 1.0% in July and 1.3% in August.



For further information, contact Industry Division at (613) 991-3551.

Retail Trade

	May	June	July	Aug.	Sept.
	% change, previous month				
Grocery and meat stores	-0.4	-0.6	1.0	2.2	-0.7
Department stores	0.3	-1.9	0.8	-0.2	-0.8
Motor vehicle dealers	0.9	-0.5	7.2	-0.2	6.4
All stores	0.2	-0.4	2.3	1.0	1.2
All stores excl. motor	0.0	-0.4	1.0	1.3	-0.3

During the first nine months of 1986, retail sales have fluctuated but generally they have been following an upward trend. Sales strengthened in the third quarter, advancing an average of 1.4% per month, compared to an average monthly increase of 0.5% in the second quarter.

Partially offsetting the impact of the gain by motor vehicle dealers were decreases in sales by combination stores (-0.7%), service stations (-1.4%), and department stores (-0.8%). Sales by department stores, which amounted to \$1.0 billion in September, declined for the second consecutive month. The decline recorded by combination stores followed two consecutive monthly increases.

The Class of 82

Two years after they graduated, 10% of the 1982 university and college graduates were unemployed. Trade and vocational graduates had a much higher rate of 26%. Three-quarters of the trade/vocational graduates had been unemployed at sometime in the two years, compared to 57% of the college and 44% of the university graduates.

On the average trade/vocational graduates spent ten months looking for work, while university and college graduates spent less than seven months.

These results from the 1984 National Graduates Survey are presented in *The Class of 82* a new release from Statistics Canada. Other findings include:

- Estimated median earnings of graduates working full-time were \$15,000 for trade/vocational, \$18,000 for college and \$24,000 for university graduates.

- Women, on average, earned \$2,000 to \$5,000 less than men with the same level of qualification.
- About 70% of trade/vocation graduates working full-time did not need their educational program to qualify for their job. This percentage dropped to 35% for college graduates and 27% for university graduates.
- In June 1984, almost 10% of bachelor's degree recipients working full-time held clerical jobs.
- About one out of ten graduates in the labour force had a part-time job. The reason most often given for part-time work was the inability to find full-time employment.

For further information, contact Education, Culture and Tourism Division (613) 991-1525.

Composite Leading Indicator

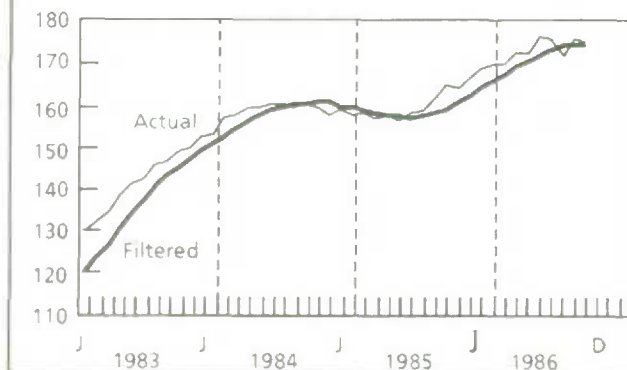
In August, as in recent months, the composite leading indicator advanced moderately (+0.3%), signalling sustained economic growth at current rates. Real output growth was 0.6% in July, followed by no change in August.

The growth of the leading indicator in August was again primarily attributable to the components of household demand for durable goods and housing. Overall, six of the 10 components rose in the month, the same as in July. The indexes of manufacturing activity weakened in August, pushing down the non-filtered level of the composite indicator slightly (-0.2%) .

For further information, contact International and Financial Economics Division at (613) 990-9162.

The Canadian Composite Leading Index

(1971 = 100)



Births and Birth Rates

In 1985, the number of live births in Canada decreased by 0.3%, to 375,727. This small decline was only the second deviation in a 12-year trend which has seen the number of live births increase by 9.4%.

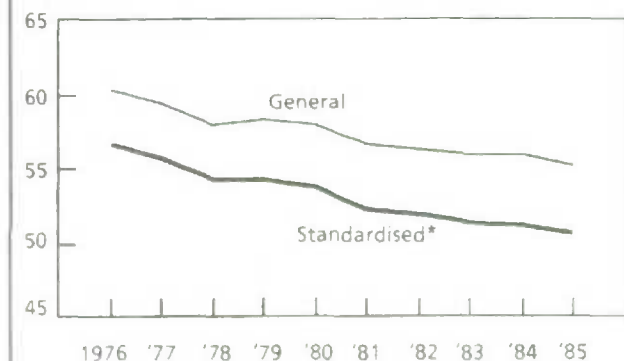
The birth rate (number of live births per 1,000 population) continued on a downward trend. In 1985, the rate was 14.8, down 1.3% from 1984 and 4.5% from 1980.

The rate of natural increase of population (difference between live births and deaths per 1,000 population) also continued to decline. It was 7.6 in 1985, the lowest level since 1979.

The average number of children born per woman of childbearing years has declined markedly over the last 25 years. In 1985, it was 1.67. Also, an increasing number of women seem to have delayed having their first child until their late twenties or early thirties. The proportion of women in these age groups having their first child has risen, while the proportion of women 24 and under having their first child has decreased.

The general fertility rate (number of births per 1,000 women of childbearing years) was 55.1 in 1985, down from 55.9 in 1984. From 1980 to 1985, this rate has declined an average of 1% per year. Fertility rates have declined for women of all age groups except those between 30 and 39 years of age.

Fertility Rates



*to the population of Canadian women in 1971

For further information, contact Health Division at (613) 991-1764.

Building Permits

For the third consecutive month, the seasonally adjusted value of building permits issued by Canadian municipalities was more than \$2 billion. Up 5.9% from July, the performance in August was entirely attributable to the residential sector, which more than offset a decrease in the non-residential sector. At this pace the value of building permits issued in 1986 should exceed \$22 billion, up approximately 15% from the \$19.5 billion recorded in 1985.

In August, the value of residential permits jumped by 23.1%, to \$1.4 billion. This was the largest monthly increase since January 1986 and follows six months of fluctuating but generally declining values. The strengthening of residential permits was due to advances in both the multi-family and single-family dwelling sectors. On a seasonally adjusted basis, 20,319 units were approved in August, up 21.9% from July.

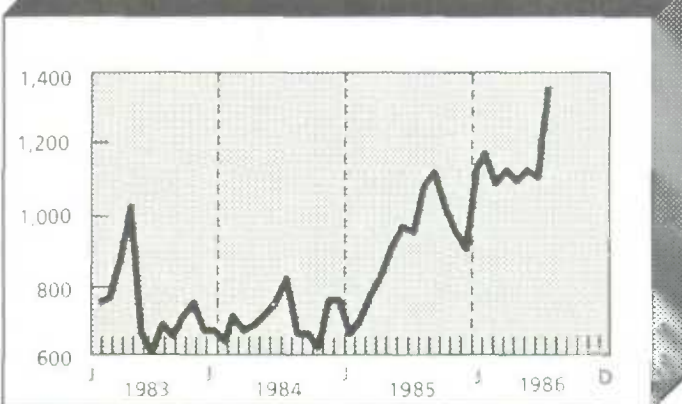
Building Permits

	Apr.	May	June	July	Aug.
	% change, previous month				
Residential	3.3	-3.1	2.9	-1.6	23.1
Non-residential	-3.9	1.8	9.2	6.2	-13.2
Total	0.1	-1.0	5.7	1.9	5.9

The value of non-residential projects, which was growing steadily, retreated by 13.2% in August. In spite of this decline, the level of intentions remained relatively high at \$862 million. Decreases were noted in all components: the commercial fell 18.6%, the industrial was down 7.5% and the public slipped a further 2.3%.

Residential Construction

(millions of dollars, seasonally adjusted)



For further information, contact Science, Technology and Capital Stock Division at (613) 991-2583.

Occupational Trends Among Women in Canada

The decade ending in 1985 saw dramatic growth in female employment with 88% of the increase occurring in three occupational groups: managerial and professional, clerical and service.

The occupational profile of employed women has shifted in the past ten years. The October 1986 issue of the *Labour Force* (71-001) contains an article which examines these changes. Highlights from the article include:

- Women accounted for 70% of total employment growth between 1976 and 1985. Female employment rose by 37% during the decade, compared to an increase of only 9% among men.
- Women occupied 44% of positions in managerial and professional occupations in 1985, up somewhat from 40% in 1976.
- Women are now the majority in social science positions, and their share of employment in natural sciences, engineering and mathematics rose in ten years from 10%, to 16%.
- Full-time employment accounted for three-quarters of the increase in the number of women in the managerial and professional occupations. In contrast, over one-half of the growth in the clerical and service occupations was part-time.
- Occupational changes over the past ten years are consistent with the rising proportion of women enrolled in university programs. Substantial increases between 1976 and 1984 in women's share of total enrolments have been noted in such fields as engineering, commerce and management at both the undergraduate and graduate levels.

For further information, contact Labour Division at (613) 991-6893.

PUBLICATIONS RELEASED FROM NOVEMBER 14 - 20

EDUCATION, CULTURE AND TOURISM

Culture Communiqué, Vol. 9, No. 8: Heritage Institutions Survey, 1983-1984 Catalogue number 87-001 (Canada: \$4/\$40; Other Countries: \$5/\$50)

Tourism and Recreation: A Statistical Digest, 1986 Catalogue number 87-401 (Canada: \$40; Other Countries: \$41.50)

GENERAL

Current Publications Index, 1986 Catalogue number 11-204E (Canada: \$10; Other Countries: \$11.50)

INDUSTRY

Asphalt Roofing, September 1986 Catalogue number 45-001 (Canada: \$4/\$40; Other Countries: \$5/\$50)

Canned and Frozen Fruits and Vegetables, June 1986 Catalogue number 32-011 (Canada: \$4/\$40; Other Countries: \$5/\$50)

Department Store Monthly Sales, by Province and Metropolitan Area, September 1986 Catalogue number 63-004 (Canada: \$2/\$20; Other Countries: \$3/\$30)

Metal Mines, 1984 Catalogue number 26-223 (Canada: \$20; Other Countries: \$21)

Oil Pipe Line Transport, August 1986 Catalogue number 55-001 (Canada: \$8/\$80; Other Countries: \$9/\$90)

Operating Results - Men's Retail Clothing Stores, 1983 Catalogue number 63-603 (Canada: \$15; Other Countries: \$16)

Production of Selected Biscuits, Quarter Ended September 1986 Catalogue number 32-026 (Canada: \$5/\$20; Other Countries: \$6/\$24)

Production, Shipments and Stocks on Hand of Sawmills East of the Rockies, August 1986 Catalogue number 35-002 (Canada: \$8/\$80; Other Countries: \$9/\$90)

INDUSTRY - continued

Production, Sales and Stocks of Major Appliances, September 1986 Catalogue number 43-010 (Canada: \$4/\$40; Other Countries: \$5/\$50)

Quarterly Report on Energy Supply-Demand in Canada, 1986 Catalogue number 57-003 (Canada: \$25/\$100; Other Countries: \$26.50/\$106)

Retail Trade, August 1986 Catalogue number 63-005 (Canada: \$14/\$140; Other Countries: \$15/\$150)

Rigid Insulating Board, September 1986 Catalogue number 36-002 (Canada: \$4/\$40; Other Countries: \$5/\$50)

Specified Domestic Electrical Appliances, September 1986 Catalogue number 43-003 (Canada: \$4/\$40; Other Countries: \$5/\$50)

INTERNATIONAL AND FINANCIAL ECONOMICS

Financial Flow Accounts, Second Quarter 1986 Catalogue number 13-002 (Canada: \$35/\$140; Other Countries: \$36/\$144)

International Travel - Advance Information, September 1986 Catalogue number 66-001P (Canada: \$5/\$50; Other Countries: \$6/\$60)

LABOUR

The Labour Force, October 1986 Catalogue number 71-001 (Canada: \$20/\$200; \$21.50/\$215)

TRANSPORTATION

Air Carrier Traffic at Canadian Airports, First Quarter 1985 Catalogue number 51-005 (Canada: \$38/\$152; Other Countries: \$39/\$156)

Railway Operating Statistics, July 1986 Catalogue number 52-003 (Canada: \$9.50/\$95; Other Countries: \$10.50/\$105)

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LATEST MONTHLY STATISTICS

			Previous Month	% Change From Year Ago
EMPLOYMENT, INCOME				
Average Weekly Earnings (\$)	Aug.	430.14	431.69	2.4
Labour Income (\$ million)	Aug.	22,446	22,740	4.5
Persons with Jobs (million)	Oct.	11.72	11.74	2.1
Unemployed	Oct.	1,116,000	1,127,000	-7.0
INVENTORIES				
Department Store (\$ million)	Aug.	3,996	3,937	14.8
Manufacturers' Owned (\$ million)	Sept.*	33,863	33,886	-1.5
ORDERS				
Manufacturers' New Orders (\$ million)	Sept.*	21,202	19,159	0.7
Manufacturers' Unfilled Orders (\$ million)	Sept.*	24,095	24,179	-0.6
PRICES				
Consumer Price Index (1981 = 100)	Oct.*	134.0	133.3	4.4
New House Price Index (1981 = 100)	Sept.	107.2	105.0	10.6
Raw Materials Price Index (1981 = 100)	Sept.	93.9	90.8	-17.6
Excl. coal, crude oil, natural gas	Sept.	105.8	105.2	7.7
Industrial Product Price Index (1981 = 100)	Sept.	119.4	119.1	0.7
CONSTRUCTION				
			Year-to-date	
Building Permits (\$ million)	Aug.*	1,897	15,487	23.8
Housing Starts - Urban Centres (units)	Sept.	17,106	125,228	26.4
ENERGY				
Coal Production (thousand tonnes)	July	3,631	233,180	-8.1
Electricity Generation (gigawatt hours)	July	33,618	263,942	2.3
Natural Gas Production (million cubic metres)	July	7,129	60,158	-4.1
Petroleum Refining (thousand cubic metres)	Aug.	7,781	56,451	-0.2
FOREIGN TRADE				
Exports - Balance of Payments Basis (\$ million)	Sept.	10,367	89,135	0.9
Imports - Balance of Payments Basis (\$ million)	Sept.	9,037	83,713	10.0
SALES				
Department Store Sales (\$ million)	Sept.	1,021	8,282	6.0
Manufacturers' Shipments (\$ million)	Sept.*	21,286	186,764	3.2
New Motor Vehicle Sales (\$ million)	Sept.	1,710	16,684	12.3
Retail Sales (\$ million)	Sept.*	11,496	100,800	8.3

Statistics are in current dollars and are not seasonally adjusted.
* new this week.

Infomat**A Weekly Review**

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