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Weekly Bulletin



February 7, 1986

Department Store Sales

Department stores in Canada reported sales totalling \$1,835.4 million in December 1985, an increase of 7.0% from a year earlier.

Cumulative sales for the period January to December 1985 totalled \$12,056.7 million, up 5.9% from the same period in 1984.

On a regional basis, department store sales during the month were as follows (with the percentage change from December 1984 in parentheses):

- Atlantic provinces, \$139.6 million (+2.7%);
- Quebec, \$331.0 million (+6.2%);
- Ontario, \$713.1 million (+9.3%);
- Manitoba, \$89.4 million (+4.1%);
- Saskatchewan, \$56.4 million (+5.4%);
- Alberta, \$234.2 million (+7.4%);
- British Columbia, \$271.7 million (+7.2%).

Order the December 1985 issue of *Department Store Sales by Regions* (63-004, \$2/\$20), or contact Lina Di Piéto (613-991-3551), Industry Division.

Industry Selling Price Index

Preliminary estimates show that the Industry Selling Price Index (ISPI) for manufacturing (1971=100) stood at 323.1 in December 1985, up 0.4% from the revised level of 321.8 for November. With this increase, the year-over-year advance, calculated by comparing the level for December 1985 with the level for December 1984, was 2.8%, a rate comparable with those recorded since October 1985. The 0.4% change for the month was primarily due to increases in the wood industry (2.0%), the petroleum and coal products industry (1.0%), the food and beverage industry (0.6%), paper and allied industries (0.4%) and the primary metals industry (0.4%).

The wood industry component index jumped 2.0% in December, up 6.8% from December 1984. The main stimulus for the monthly increase was a 3.5% upswing in the sawmills and planing mills index. Most of this rise was attributable to price increases of 5.5% for Douglas fir, 5.7% for cedar and 2.5% for hemlock.

According to preliminary estimates, the petroleum and coal products index gained 1.0% in December, primarily as a result of an increase in gasoline prices. The year-over-year advance was estimated at 2.9%.

The food and beverage industry index climbed 0.6% in December, up 2.9% from a year earlier. The monthly rise stemmed (continued on page 2, col. 1)

LATEST MONTHLY STATISTICS

EMPLOYMENT, INCOME

Average Weekly Earnings(\$)	Nov.	425.15	425.04	3.5
Labour Income (\$ million)	Oct.	21,385.2	21,401.5	7.4
Persons with Jobs (million)	Dec.	11.34	11.43	3.4
Unemployed	Dec.	1,238,000	1,246,000	-5.9

INVENTORIES

Department Store (\$ million)	Nov.	4,332.8	4,288.7	9.8
Manufacturers' Owned (\$ million)	Nov.	34,066.5	34,067.6	3.1

ORDERS

Manufacturers' New Orders (\$ million)	Nov.	21,334.2	21,794.4	7.7
Manufacturers' Unfilled Orders (\$ million)	Nov.	22,374.5	22,390.1	1.7

PRICES

Consumer Price Index (1981=100)	Dec.	129.5	128.9	4.4
New House Price Index (1981=100)	Nov.	97.8	97.3	3.5
Raw Materials Price Index (1977=100)	Dec.*	219.3	218.3	-1.1
Excl. coal, crude oil, nat. gas	Dec.*	158.2	156.6	1.3
Industry Selling Price Index (1971=100)	Dec.*	323.1	321.8	2.8

CONSTRUCTION

Building Permits (\$ million)	Nov.*	1,466.6	18,022.8	26.2
Housing Starts - Urban Centres (units)	Dec.*	12,342	139,408	25.7

ENERGY

Coal Production (thousand tonnes)	Nov.*	5 123	55 871	6.6
Electricity Generation (gigawatt hours)	Nov.*	40 013	401 899	4.7
Natural Gas Production (million cubic metres)	Sept.	6 826	69 064	8.3
Petroleum Refining (thousand cubic metres)	Nov.	7 246	78 416	-2.0

FOREIGN TRADE

Exports - Balance of Payments Basis (\$ million)	Nov.	10,367	110,160	6.8
Imports - Balance of Payments Basis (\$ million)	Nov.	9,255	95,089	12.5

PRODUCTION

Railway Carloadings (million tonnes)	Nov.	20.1	219.5	-1.5
Steel (ingots - thousand tonnes)	Nov.	1 228	13 353	-0.8

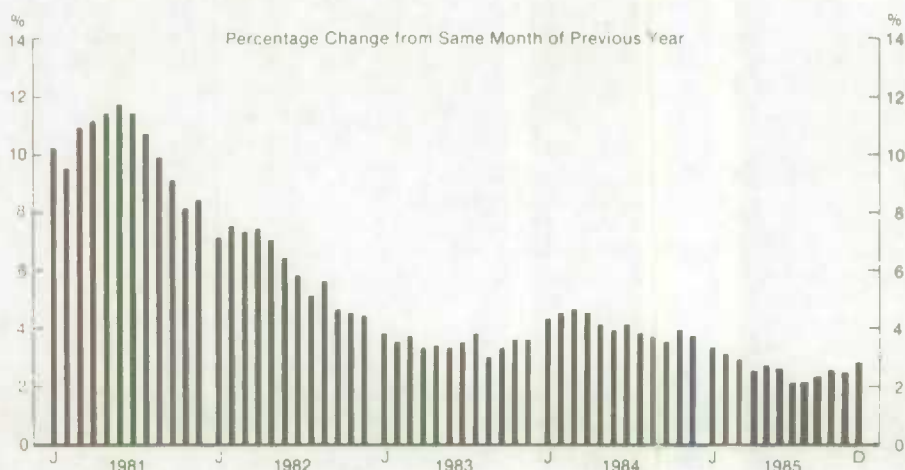
SALES

Department Store Sales (\$ million)	Nov.	1,360.2	10,221.3	5.7
Manufacturers' Shipments (\$ million)	Nov.	21,349.9	223,182.1	7.2
New Motor Vehicle Sales (\$ million)	Nov.	1,696.4	18,436.8	26.2
Retail Sales (\$ million)	Nov.	11,881.9	115,226.2	10.6

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)

... Industry Selling Price Index

chiefly from increases of 1.9% in the slaughtering and meat processors index, 2.0% in the feed industry index and 0.8% in the bakeries index. Price increases of 2.3% for fresh or frozen beef, 3.4% for fresh or frozen pork and 10.6% for cattle hides were major factors in the advance of the slaughtering and meat processors index for the month. Most of the monthly increase in the bakeries index was attributable to price rises of 1.1% for bread and 1.7% for plain rolls and buns.

The paper and allied industries index rose 0.4% in December, but remained 0.3% below its December 1984 level. A 0.5% increase in the pulp and paper mills index, due in part to a 1.2% appreciation of the U.S. dollar against its Canadian counterpart, was largely responsible for the monthly rise in the group index.

The primary metals index was up 0.4% in December, but remained 0.4% lower than a year earlier. The monthly advance was mainly due to a 2.0% increase in the smelting and refining index, partly offset by a 0.4% decline in the iron and steel mills index. Higher prices for copper (4.2%) and zinc (1.1%) were the major factors in the smelting and refining index's increase for the month.

Order the December 1985 issue of Industry Price Indexes (62-011, \$15/\$150), or contact the Information and Current Analysis Unit (613-990-9606/7), Prices Division.

Railway Carloadings

Revenue freight loaded by railways in Canada totalled 18.7 million tonnes in December 1985, an increase of 10.3% from the previous year. In addition, the carriers received 1.0 million tonnes from the United States, a decrease of 6.4% from December 1984.

Commodities registering notable changes in volumes loaded for the latest month were: wheat (+58.9%); coal (+18.0%); iron ore and concentrates (+4.6%) and lumber (+45.1%).

The total loadings in Canada for the year 1985 showed a decrease of 0.7% from 1984, while receipts from United States connections decreased by 5.2%.

Order the December 1985 issue of Railway Carloadings (52-001, \$7.50/\$75), or contact the Rail Unit (613-990-8700), Transportation Division.

Major Appliances

Canadian major appliance firms produced 176,821 units in December 1985, a decrease of 6.5% from the 189,182 units produced in the previous month.

Domestic sales of major appliances by these firms decreased to 168,279 units in December 1985, down 1.5% from November 1985.

Order the December 1985 issue of Production, Sales and Stocks of Major Appliances (43-010, \$4/\$40), or contact Roger Laplante (613-990-9837), Industry Division.

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Weekly Bulletin

Published by the Communications Division, Statistics Canada.

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Editor: Rachelle Pilon (613-991-1107)

R.H. Coats Building, Tunney's Pasture, Ottawa, Ontario K1A 0T6.

Catalogue: 11-002E. Price: Canada, \$2/\$100; other countries, \$3/\$150. To subscribe: send money order or cheque payable to the Receiver General for Canada to Publication Sales and Services, Statistics Canada, Ottawa, Ontario K1A 0T6.

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Machinery and Equipment Price Index

The Machinery and Equipment Price Index (MEPI, 1971 = 100) by industry of purchase stood at a preliminary level of 301.8 in the fourth quarter of 1985, up 1.7% from its revised level of 296.8 for the preceding quarter. The domestic prices component rose 1.1% in the latest quarter while the more heavily weighted imported goods component of the total index jumped 2.2%, partially reflecting a weakening of the Canadian dollar against the U.S. dollar during the period.

From the fourth quarter of 1984 to the fourth quarter of 1985, the total index rose 4.6%, up slightly from the 4.0% change registered in the third quarter of 1985. Prices for domestically produced machinery and equipment increased 4.0% while imported goods prices rose 5.2%, largely due to the Canadian dollar, which was weaker against its U.S. counterpart.

By industry division, price movements in the latest quarter ranged from a 0.6% rise for machinery and equipment purchased by the fishing industry to a jump of 2.4% for purchases by the trade industry. On a year-over-year basis, price movements varied from an increase of 1.8% for both the agriculture and fishing industries to hikes of 5.7% registered by the trade industry and public administration.

Order the fourth quarter issue of Construction Price Statistics (62-007, \$15/\$60), or contact L. Graham (613-990-9601), Prices Division.

Coal Statistics

Canadian production of coal totalled 5 123 kilotonnes in November 1985, down 1.9% from the 5 221 kilotonnes produced a year earlier. Exports of coal decreased 5.7% to 1 702 kilotonnes from 1 804 kilotonnes while imports of 1 406 kilotonnes were reported.

Order the November 1985 issue of Coal and Coke Statistics (45-002, \$8/\$80).

Raw Materials Price Index

The Raw Materials Price Index (RMPI, 1977 = 100) stood at a preliminary level of 219.3 in December 1985, up 0.5% from the revised November level of 218.3. Compared to December 1984 the RMPI decreased 1.1%. The Raw Materials Price Index excluding coal, crude oil and natural gas increased 1.0% over the month to stand at a level 1.3% higher than a year ago. Of the eight components making up the Raw Materials Price Index, six increased between November and December, one registered a decrease and one remained unchanged. The decrease was registered by the wood component index, down 1.2% in December, while the most significant increases were posted by the vegetable products component (4.8%) and the animal and animal products component (0.9%).

The wood component was down 1.2% in December but was still at a level 6.1% higher than December 1984. A 4.3% decrease in pulpwood prices was the cause of the monthly drop.

The vegetable products component increased 4.8% in December, but remained 3.7% lower than its year-earlier level. Half of the monthly increase was attributable to a 24% increase in green coffee prices in December, reflecting reports of a Brazilian drought. Higher prices for apples, oranges and pears resulted in a 7.9% increase in the fresh fruit index. The fresh vegetable index was up 5.3%, mainly because of higher prices for carrots, cabbages and tomatoes. The index for wheat and other grains increased 1.5% in December but was still 14.9% lower than its year-ago level.

The animal and animal products component index rose 0.9% in the month to a level 1.3% higher than December 1984. Even though hog prices rose 3.7% in December, the index for hogs remained 1.3% lower than a year ago. The index for hides and skins was up 8.7% in December to stand 40.3% higher than its year-earlier level. An increase in the price of milk for fluid use in Saskatchewan resulted in a rise of 0.4% in the December index and a 3.9% increase over 12 months. The index for eggs however, dropped 1.2% in response to lower feed costs. It is 4.2% lower than one year ago.

Order the December 1985 issue of Industry Price Indexes (62-011, \$15/\$150), or contact the Information and Current Analysis Unit (613-990-9606/7), Prices Division.

The Dairy Review

Creamery butter production in Canada totalled 7 138 tonnes in December 1985, a decrease of 10.3% from a year earlier.

The December 1985 production of cheddar cheese in Canada amounted to 8 697 tonnes, an increase of 14.9% compared to December 1984.

An estimated 589 826 kilolitres of milk were sold off Canadian farms for all purposes in November 1985, an increase of approximately 7.5% over November 1984.

Order the December 1985 issue of The Dairy Review (23-001, \$10/\$100), or contact Dave Burroughs (613-991-2550), Agriculture and Natural Resources Division.

Construction Building Material Price Indexes

Residential

The price index for residential construction building materials (1981 = 100) rose to 122.5 in December, up 0.2% from its revised November level of 122.3. This index now stands 5.8% higher than its year-ago level of 115.8.

Between November and December 1985, an increase was noted in only one of the four component indexes - structural materials increased 1.8%. The other three components showed decreases: electrical materials (-0.3%), followed by architectural materials (-0.2%) and mechanical materials (-0.1%). The change in the total index was mainly attributable to a price increase for lumber which more than offset price decreases, principally for gypsum wallboard, wooden doors and coated building paper.

Between December 1984 and December 1985, the largest year-over-year price increase was recorded for architectural materials (6.8%), followed by structural materials (4.9%), mechanical materials (4.3%) and electrical materials (0.6%).

Non-residential

The non-residential construction building material price index (1981 = 100) remained unchanged in December from its revised November level of 121.8. This index of non-residential building material prices now stands 4.7% higher than its year-ago level of 116.3.

Between November and December 1985, an increase (0.4%) was reported for structural materials while the other three components decreased: electrical materials by 0.3%, architectural materials by 0.2% and mechanical materials by 0.1%. A sharp price increase was recorded for lumber, but this and other increases were offset by price decreases, principally for wooden doors, building wires and cables and gypsum wallboard.

Between December 1984 and December 1985, architectural materials increased 5.9%, followed by mechanical materials (5.2%), structural materials (4.0%) and electrical materials (1.5%).

Order the fourth quarter 1985 issue of *Construction Price Statistics* (62-007, \$15/\$60), or contact the Information Service (613-990-9606/7), Prices Division.

Railway Financial and Operating Statistics

The seven major railways reported a combined net income from operations of \$49.4 million in November 1985. Operating revenues of \$631.9 million were up 0.6% from the 1984 figure.

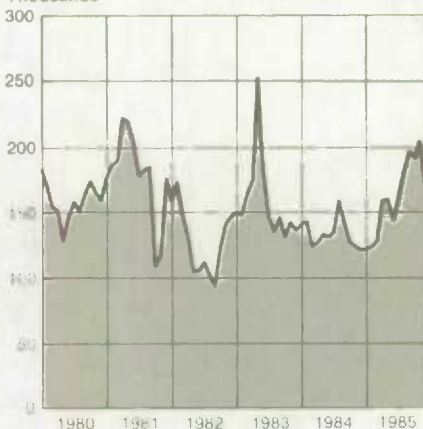
Revenue freight tonne-kilometres were down by 9.4% for November 1985. Freight train-kilometres showed a decrease of 4.0%, while freight car-kilometres decreased 5.8%. The average revenue per tonne-kilometre of freight was 2.656 cents for November 1985. Revenue passenger-kilometres increased 5.9% to 144.5 million.

Order the November 1985 issue of *Railway Financial and Operating Statistics* (52-003, \$9.50/\$95), or contact the Rail Unit (613-990-8700), Transportation Division.

Housing Starts in Canada

Seasonally Adjusted at Annual Rates

Thousands



Source: Statistics Canada, Housing Starts and Completions

Building Permits

The seasonally adjusted value of building permits issued by Canadian municipalities declined in November 1985 for the third consecutive month, down 10.5% to \$1,610.2 million from \$1,798.7 million in October. Substantial drops were recorded in both the residential and the non-residential sectors.

However, in spite of this decline, 1985 will mark (in constant terms) the best performance since 1981 for both the residential and the non-residential sectors.

The seasonally adjusted value of November residential building permits decreased 11.7% from the previous month to \$896.2 million. A sharp drop recorded in the single-family dwelling sector was mainly responsible for this fall. On a seasonally adjusted basis, 14,349 units were approved in November (8,079 single detached and 6,270 multiple dwellings), down 12.1% from the 16,316 units authorized in October (9,691 single detached and 6,625 multiple dwellings). In annual terms, these approvals represent 172,200 units in November compared to 195,800 units in October. Residential building permits decreased in all regions in November.

The seasonally adjusted value of non-residential projects in November decreased 8.9% to \$714.0 million from \$783.8 million in October. Permits fell 29.9% in the industrial sector and decreased 3.6% in the commercial sector while a 1.8% increase was recorded in the public sector. Decreases were registered in November for all regions except Ontario where the total registered little change.

Order the November 1985 issue of *Building Permits* (64-001, \$20/\$200), or contact G. Lemay (613-990-9689), Science, Technology and Capital Stock Division.

Housing Starts

Housing starts in December were at a seasonally adjusted rate of 172,000 units, down from the revised level of 204,000 in November. Both single and multiple dwelling starts declined.

Housing starts reached a total of 165,826 for 1985, up 22.9% from 1984.

Order the December 1985 issue of *Housing Starts and Completions* (64-002, \$15/\$150), or contact P. Pichette (613-990-9689), Science, Technology and Capital Stock Division.

Business Conditions Survey

Canadian manufacturers reporting to the January 1986 Business Conditions Survey forecast lower production levels for the first quarter of 1986 compared to the last quarter of 1985. Lower production is expected by manufacturers representing 32% of total respondents' shipments whereas only 21% anticipate higher production levels.

Little change was reported by manufacturers in the receipt of new orders with 65% indicating that new orders remained at approximately the same level as in the preceding quarter.

The backlog of unfilled orders was reported as normal by manufacturers representing 67% of total respondents' output.

Canadian manufacturers remain cautious about inventory build-up though, with only 4% indicating that their finished product inventory is too low.

Contact T. Newton (613-991-3554), Industry Division.

Electric Power Statistics

Net generation of electricity in Canada in November 1985 increased by 6.1% to 40 013 gigawatt hours from 37 729 gigawatt hours a year earlier. Exports of electric power increased 2.1% to 3 345 gigawatt hours from 3 276 gigawatt hours and imports increased by 5.0% to 202 gigawatt hours from the November 1984 level of 192 gigawatt hours.

During the first 11 months of 1985, net generation of electricity totalled 401 899 gigawatt hours, up 4.7% from the January-November 1984 level of 383 985 gigawatt hours. Exports of electricity rose 3.9% to 39 676 gigawatt hours from 38 197 gigawatt hours and imports rose 15.3% to 2 536 gigawatt hours from 2 199 gigawatt hours.

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

Gas Utilities

Sales of natural gas in Canada amounted to 3 736 million cubic metres in October 1985, an increase of 7.0% from 3 490 million cubic metres a year earlier.

Reported exports to the United States reached 2 079 million cubic metres during October 1985, an increase of 27.5% from 1 630 million cubic metres in October 1984.

Order the October 1985 issue of *Gas Utilities* (55-002, \$10/\$100), or contact Gary Smalldridge (613-991-3567), Energy Section, Industry Division.

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Production and Stocks of Eggs and Poultry, November 1985	23-003	\$10/\$100	\$11/\$110
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Canadian Statistical Review, January 1986	11-003E	\$20/\$200	\$21.50/\$215
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