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Weekly Bulletin



March 21, 1986

Capacity Utilization in Canadian Manufacturing

Capacity utilization in Canadian manufacturing edged upwards by 0.6% in the fourth quarter of 1985 to a level of 78.4% from 77.9% in the third quarter of 1985. This marked the continuance of a trend - started in 1983 - of gradual advances in capacity utilization rates. (This coincides with a trend of increasing production in the manufacturing sector.) In the non-durable manufacturing industries, capacity utilization increased by 1.8% to a level of 84.3%. In the durable sector, capacity utilization decreased by 0.8% to a level of 72.6%; the drop reflected increased fixed assets (production capacity) that more than offset an increase in production.

While the current production level for the total manufacturing sector is relatively high, this is not the case for all industry groups. Industries such as rubber and plastic products, paper and allied products, and printing, publishing and allied industries have achieved high levels of production and are also showing high utilization rates. (The rate for the printing, publishing and allied group reached the maximum of 100% this quarter; a utilization rate of 100% shows the industry is obtaining peak production from its fixed assets.)

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

Composite Leading Indicator

The leading indicator posted its seventh straight monthly increase in December (1.4%), rising to 168.0. This advance, like the one recorded in November, is about equal to the historical average for expansions. The increase in the non-filtered index between April and December (when it jumped 1.2%) was almost 11%.

The sustained rise in the filtered index reflects growing strength in the household demand indicators, coupled with a recent firming in the manufacturing indicators. The average quarterly growth rate of GNP accelerated from 0.9% in the first half of 1985 to 1.5% in the second half. Housing construction and consumer spending contributed to substantial growth in output during the fourth quarter.

Order Current Economic Indicators (13-005, \$10/\$100), or contact G. Proulx (613-990-9163).

LATEST MONTHLY STATISTICS

EMPLOYMENT, INCOME

			Previous Month	% Change From Year Ago
Average Weekly Earnings(\$)	Dec.	425.55	425.33	4.3
Labour Income (\$ million)	Dec.	21,130.4	21,281.8	6.9
Persons with Jobs (million)	Feb.	11.25	11.20	4.4
Unemployed	Feb.	1,341,000	1,347,000	-7.8

INVENTORIES

Department Store (\$ million)	Dec.	3,536.6	4,332.8	12.7
Manufacturers' Owned (\$ million)	Dec.	33,786.6	33,983.2	2.1

ORDERS

Manufacturers' New Orders (\$ million)	Dec.	19,667.3	21,180.9	12.2
Manufacturers' Unfilled Orders (\$ million)	Dec.	22,207.9	22,339.0	1.9

PRICES

Consumer Price Index (1981 = 100)	Jan.	130.1	129.5	4.4
New House Price Index (1981 = 100)	Jan.	99.4	98.2	4.6
Raw Materials Price Index (1981 = 100)	Jan.	115.7	118.0	-1.5
Excl. coal, crude oil, nat. gas	Jan.	103.3	101.6	3.0
Industrial Product Price Index (1981 = 100)	Jan.	120.5	119.7	2.6

CONSTRUCTION

			Year-to-date	% Change
Building Permits (\$ million)	Dec.*	1,349.4	19,372.2	25.9
Housing Starts - Urban Centres (units)	Jan.	9,335	9,335	21.8

ENERGY

Coal Production (thousand tonnes)	Nov.	5 123	55 871	6.6
Electricity Generation (gigawatt hours)	Dec.	44 491	446 412	5.1
Natural Gas Production (million cubic metres)	Nov.	9 194	86 120	7.5
Petroleum Refining (thousand cubic metres)	Dec.	7 331	86 216	-1.7

FOREIGN TRADE

Exports - Balance of Payments Basis (\$ million)	Jan.	10,124	10,124	10.8
Imports - Balance of Payments Basis (\$ million)	Jan.	8,973	8,973	16.4

PRODUCTION

Railway Carloadings (million tonnes)	Jan.*	19.3	19.3	5.0
Steel (ingots - thousand tonnes)	Dec.	1 200	14 553	-0.1

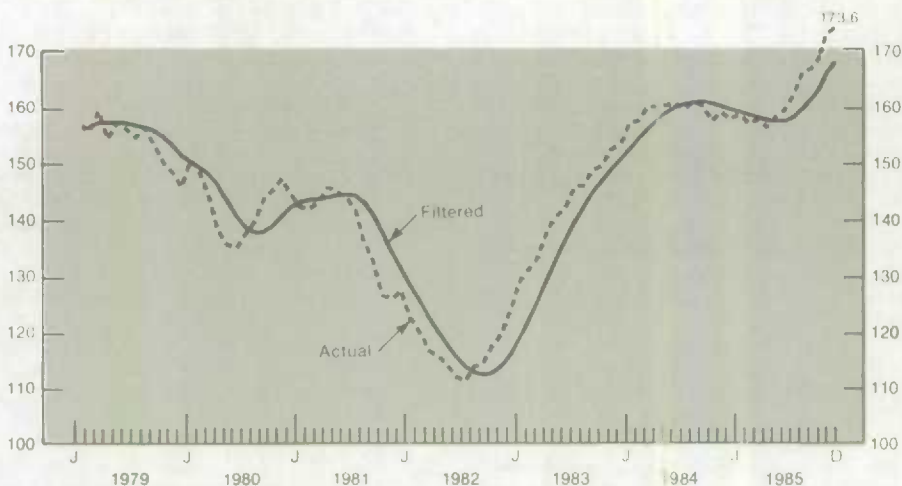
SALES

Department Store Sales (\$ million)	Dec.	1,835.4	12,056.7	5.9
Manufacturers' Shipments (\$ million)	Dec.	19,798.4	242,862.7	7.5
New Motor Vehicle Sales (\$ million)	Jan.	1,339.9	1,339.9	17.5
Retail Sales (\$ million)	Jan.*	9,687.4	9,687.4	11.9

Statistics are in current dollars and are not seasonally adjusted.

* - new this week.

The Canadian Composite Leading Index (1971=100)



Source: Statistics Canada, Current Economic Indicators (13-005)

Security Transactions

Net foreign purchases of outstanding Canadian bonds totalled nearly \$400 million in January 1986, compared to \$45 million the previous month. Geographically, the United States accounted for half of this increase while sizeable investments were also recorded from Japan. Following a rise in long-term interest rates in Canada, the yield differential between long-term instruments in Canada and the United States widened during January. Net foreign purchases of Canadian stocks lessened by about \$50 million to \$172 million.

Residents reduced their holdings of foreign bonds by over \$200 million in the current month. Net purchases by residents of outstanding foreign stocks amounted to \$68 million, \$100 million less than in December.

Order the January 1986 issue of Security Transactions with Non-residents (67-002, \$15/\$150), or contact J. Motala (613-990-9052). Balance of Payments, International and Financial Economics Division.

Cancer in Canada

Provincial registries reported a total of 80,845 new cases of cancer in 1981, of which 41,856 occurred in males and 38,989 in females. The age-standardized rate per 100,000 population of these cancers (which exclude skin cancer other than melanoma) was 347.9 for males and 318.5 for females.

The four leading cancer sites for each sex – cancer of the lung, prostate, colon and bladder for men, and cancer of the breast, colon, lung, and uterine body for women – accounted for just over half of all newly diagnosed cancers (other than skin cancer) in 1981. Significantly, lung cancer is now firmly established as the third leading site of cancer incidence in women, having first overtaken cancer of the uterine body (now the fourth leading site), in 1980.

Mortality and Hospital Morbidity

In 1981, a total of 40,362 cancer deaths were registered, including 22,409 in males and 17,953 in females. Cancer mortality is accordingly about half that of cancer incidence.

Hospital morbidity data are useful to determine the number of Canadians being treated for cancer in any one year, regardless of when their disease first occurred. In 1981, a total of 84,924 males and 79,918 females were reported on hospital separation records as having a primary diagnosis of cancer, with an average stay of 18.7 days for males and 18.8 days for females.

The National Cancer Incidence Reporting System, which began operating at Statistics Canada in 1969, is based on reports of newly diagnosed cancers from provincial tumour registries. With the inclusion of Ontario data in the 1981 report, complete cancer incidence data are now available at the national level for the first time.

Order Cancer In Canada, 1981 (82-207, \$35), or contact Leslie Gaudette (613-991-1769), Vital Statistics and Health Status Section, Health Division.

Infomat

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Help-wanted Index

The seasonally adjusted Help-wanted Index (1981=100) for Canada decreased 3.4% to 84 from 87 between January and February 1986. By region, the index declined 8.4% in Ontario (to 98 from 107) and 4.3% in Quebec (to 89 from 93). It advanced 40.4% in the Atlantic provinces (to 205 from 146), 9.3% in the Prairie provinces (to 47 from 43) and 7.9% in British Columbia (to 41 from 38).

Compared with the same month last year, the February 1986 Canada index increased 31.3%.

Order the Help-wanted Index (71-204, \$10/\$11), or contact Horst Stiebert (613-990-9900), Labour Division.

Employment Growth

While overall employment growth rose 19% during the last 10 years, employment in the services to business management sector increased a substantial 68%.

A study based on the 1981 Census of Population and estimates from the monthly Labour Force Survey shows:

- Nearly half of all persons employed in business services in 1981 (47%) were in occupational groups which are associated with a high level of educational attainment – natural sciences, engineering and mathematics, managerial and administrative occupations, and social sciences. In contrast, only 14% of the total number of persons employed fell into these occupational groups.
- The proportion of self-employed workers in business services increased from 16% in 1976 to 24% in 1985.
- Although the number of paid workers in business services declined during the recession, down 27,000 to 332,000 from 1981 to 1983, the number of self-employed workers continued to rise, up 22,000 to 108,000.

Order the February 1986 issue of The Labour Force (71-001, \$20/\$200).

Trusted Pension Funds

The book value of assets held in trusted pension funds was estimated to be \$105.7 billion at the end of the third quarter of 1985. This represents an increase of \$3.3 billion over the assets of the previous quarter and \$12.6 billion more than the amount held one year earlier.

Bonds, accounting for 46.5% of total assets, continued to be the most prominent investment vehicle. Equity holdings remained unchanged from the previous quarter at 26.3% and mortgages continued their slow decline from 6.2% of total assets at end of the second quarter of 1985 to 6.1% at September 30, 1985.

Total income for the third quarter of 1985 amounted to \$4.3 billion: 50.6% was investment income, 12.5% consisted of net gains on sales of securities and virtually all of the balance was made up of contributions by employees and employers. From this revenue, expenditures of \$1.412 billion were met, leaving a net cash flow of \$2.9 billion.

Order the third quarter 1985 issue of Quarterly Estimates of Trusted Pension Funds (74-001, \$10/\$40), or contact Jessica Dunn or Diane Galarneau (613-990-9900), Pensions Section, Labour Division.

Intermetropolitan Migration

Intermetropolitan Migration in Canada, an analytical study co-published by Statistics Canada and NC Press, shows that as our society becomes increasingly wealthy, traditional labour market forces such as wages, cost of living variables and economic stress involving unemployment and poverty appear to diminish as influences on migration between metropolitan areas.

Higher standards of living may dampen the response of migrants to labour market forces and wealthier societies install more 'safety nets' to protect their citizens from the effects of economic stress. This implies that traditional tools of employment policy for influencing the distribution of labour between cities – higher wages, job-related training, relocation grants – may have less impact on potential migrants.

Order Intermetropolitan Migration in Canada: Changing Determinants Over Three Decades ISBN 0-920053-72-6 (bound, \$24.95), ISBN 0-920053-70-X (paperback, \$16.95), from NC Press, 31 Portland Street, Toronto, Ontario M5V 2V9 (416-593 6284). This publication is NOT available from Statistics Canada.

Provincial Government Finance

The gross general revenue of all provincial and territorial governments reached \$88.3 billion for the fiscal year ended March 31, 1984, an increase of 12.2% over the previous fiscal year. This increase is higher than the 8.6% recorded in 1982-83 but is lower than the 15.2% recorded in 1981-82.

At \$92.8 billion, gross general expenditures were up 7.9% from the previous year, the first time since the 1974-75 fiscal year that the expenditure grew by less than 10%.

Contact G. Huneault (613-991-1812), Public Institutions Division.

Union Wage Rate Index

The Canada total Union Wage Rate Index (1981=100) for construction trades (including supplements) registered no change between February 1986 and January 1986, remaining at a level of 132.1.

Comparing February 1986 with the same month in 1985, the Canada total level rose 3.4%. By city, the largest increase was reported in Halifax (10.1%) while indexes in cities in Quebec, Ontario and British Columbia increased 4.4% on average. Indexes advanced 2.4% in Saint John and 2.0% in Winnipeg while in Newfoundland, Alberta and Saskatchewan increases were less than 1%.

Order the first quarter 1986 issue of *Construction Price Statistics* (62-007, \$15/\$60).

Construction Building Material Price Indexes

The price index for residential construction building materials (1981=100) rose to 124.4 in January 1986, up 1.9% from its revised December 1985 level of 122.1. This index now stands 7.1% higher than the year-earlier level of 116.2.

Between December 1985 and January 1986, increases were noted in all four component indexes: structural materials increased 3.7%, followed by architectural materials (1.5%), mechanical materials (1.1%) and electrical materials (0.9%). The change in the total index was attributable to price increases for all materials except particleboard and an increase of one percentage point in the federal sales tax rate, applicable to most construction building materials.

Between January 1985 and January 1986, the largest year-over-year price increase was recorded for architectural materials (8.1%), followed by structural materials (7.8%) and mechanical materials (2.5%). The overall price level for electrical materials remained unchanged.

Non-residential

The price index for non-residential construction building materials (1981=100) rose to 123.2 in January 1986, up 1.6% from its revised December 1985 level of 121.3. This index now stands 5.1% higher than its year-ago level of 117.2.

Between December 1985 and January 1986, increases were noted in all four component indexes: structural materials increased 2.9%, followed by architectural materials (1.4%), mechanical materials (1.2%) and electrical materials (0.8%). The change in the total index was attributable to price increases for all materials except particleboard, metal roofing and siding. An increase of one percentage point in the federal sales tax rate in January 1986 was one of the most significant contributors.

Between January 1985 and January 1986, the largest year-over-year price increase was observed for structural materials (6.8%), followed by architectural materials (6.2%), mechanical materials (2.1%) and electrical materials (1.7%).

Order the first quarter 1986 issue of *Construction Price Statistics* (62-007, \$15/\$60), or contact the Information Service (613-990-9606/7), Prices Division.

Building Permits, Canada

(Seasonally Adjusted)



Source: Statistics Canada, Building Permits (64-501)

Retail Trade

Preliminary estimates of total retail trade for January 1986 indicate an increase of 11.9% over the same month last year, totalling \$9,687.4 million in current dollars (not adjusted for inflation). With the exception of garages and men's clothing stores whose sales decreased by 6.3% and 0.4% respectively, all kinds of businesses surveyed reported increased sales in January 1986 as compared to January 1985. The most notable gains were registered by specialty shoe stores (26.9%), florists (21.2%), motor vehicle dealers (19.2%) and book and stationery stores (19.2%).

All provinces and territories reported higher sales in January 1986 over the corresponding month in 1985, with gains ranging from 17.9% in Alberta to 5.2% in both Prince Edward Island and Saskatchewan. At the metropolitan area level, sales advanced in all cities for which data are published: Vancouver (13.2%), Toronto (13.1%), Winnipeg (12.5%) and Montreal (8.9%).

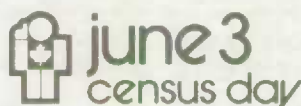
The revised retail sales estimates for December 1985 amounted to \$13,212.4 million, an increase of 11.0% over December 1984. Total retail trade in 1985 reached \$128,426.1 million, up 10.6% over the 1984 level of \$116,079.4 million.

Order the January 1986 issue of *Retail Trade* (63-005, \$14/\$140).

Railway Carloadings

Revenue freight loaded by railways in Canada totalled 19.3 million tonnes in January 1986, an increase of 5.0% from the previous year. The carriers received an additional 1.2 million tonnes from the United States, an increase of 6.4% from January 1985.

Order the January 1986 issue of *Railway Carloadings* (52-001, \$7.50/\$75).



Building Permits

The seasonally adjusted value of building permits issued by Canadian municipalities in December declined for a fourth consecutive month, down 7.1% to \$1,592.6 million from \$1,714.9 million in November. This fall was the result of a sharp drop in the non-residential sector combined with a moderate decrease in the residential sector.

For a third consecutive month, the seasonally adjusted value of residential building permits declined, down 4.5% in December to \$895.6 million from \$938.1 million in November. The weakness of intentions recorded in the multi-family dwelling sector was entirely responsible for this decrease. On a seasonally adjusted basis, 12,844 units were approved in December (8,124 single detached and 4,760 multiple dwellings), down 12.3% from 14,686 units in November (8,474 single detached and 6,212 multiple dwellings). In annual terms, these approvals represent 154,000 units in December and 176,200 units in November. Residential building permits in December dropped in Quebec, increased moderately in Ontario and levelled-off in all other regions.

The seasonally adjusted value of non-residential projects in December fell 10.3% to \$697.0 million from \$776.8 million in November. The industrial (-12.4%) and more particularly the public sector (-37.4%) were responsible for this sharp decrease. The commercial sector continued to progress (1.0%) slightly. The value of non-residential projects decreased in Quebec and the Atlantic provinces while it remained stable in all other regions.

In the year 1985, the value of building permits totalled \$19.5 billion compared to \$15.5 billion in 1984, registering a significant increase of 25.9%. The residential value moved up 27.8% to \$10.9 billion. Non-residential construction intentions rose to \$8.6 billion, up 23.6%. All components recorded large increases: the best performance was registered by the industrial sector (37.6%) followed by the commercial sector (24.9%) and the public sector (10.9%).

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

Department Store Sales

Department stores in Canada reported sales totalling \$762.7 million in January 1986, an increase of 10.2% from a year earlier.

On a regional basis, department store sales during the month were as follows (percentage change from January 1985 in parentheses):

- Atlantic provinces, \$46.9 million (6.7%);
- Quebec, \$141.5 million (8.4%);
- Ontario, \$280.3 million (12.7%);
- Manitoba, \$37.1 million (7.7%);
- Saskatchewan, \$23.3 million (5.1%);
- Alberta, \$108.7 million (11.0%);
- British Columbia, \$125.1 million (8.2%).

Order the January 1986 issue of *Department Store Sales by Regions* (63-004, \$2/\$20).



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PUBLICATIONS RELEASED MARCH 14 - MARCH 20

	Cata- logue No.	In Canada: Price per issue/year	Elsewhere: Price per issue/year
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Index Numbers of Farm Prices of Agricultural Products, January 1986	62-003	\$6/\$60	\$7/\$70
ECONOMETRIC ANALYSIS			
Current Economic Indicators, Vol. 2, No. 2, March 1986	13-005	\$10/\$100	\$11/\$110
EDUCATION, CULTURE AND TOURISM			
Culture Communique, Vol. 9, No. 1: Newspapers, 1984	87-001	\$4/\$40	\$5/\$50
Education Statistics Bulletin, Vol. 8, No. 2: Full-time Enrolments in Public Trade Schools and Similar Institutions - Preliminary Data, 1982-83	81-002	\$4/\$40	\$5/\$50
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Cancer in Canada, 1981	82-207	\$35	\$36.50
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The Labour Force, February 1986	71-001	\$20/\$200	\$21.50/\$215
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Fruit and Vegetable Preservation, Vol. 14, No. 4: Pack of Processed Peas, 1985	32-023	\$6/\$100	\$7/\$110
Fruit and Vegetable Preservation, Vol. 14, No. 6: Pack of Processed Corn, 1985	32-023	\$6/\$100	\$7/\$110
Fruit and Vegetable Preservation, Vol. 14, No. 8: Pack of Processed Beans, Green and Wax, 1985	32-023	\$6/\$100	\$7/\$110
Gas Utilities, November 1985	55-002	\$10/\$100	\$11/\$110
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Imports by Countries, January-December 1985	65-006	\$75/\$300	\$85/\$340
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Quarterly Estimates of Trusteed Pension Funds, Second Quarter 1985	74-001	\$10/\$40	\$11/\$44
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Provincial Government Enterprise Finance, 1983	61-204	\$25	\$26.50
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Telephone Statistics, December 1985	56-002	\$7.50/\$75	\$8.50/\$85
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Air Carrier Traffic at Canadian Airports, First Quarter 1984	51-005	\$38/\$152	\$39/\$156
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Service Bulletin, Vol. 18, No. 2: Aviation Statistics Centre, February 1986	51-004	\$8.50/\$85	\$9.50/\$95

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