

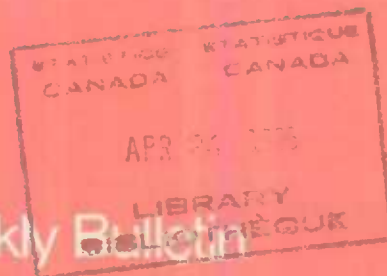


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Weekly Bulletin



April 25, 1986

## Inventories, Shipments and Orders

Preliminary estimates indicate that the seasonally adjusted value of shipments for all Canadian manufacturing industries in February remained virtually unchanged at \$21,496.5 million from the revised estimate of \$21,514.1 million in January. This follows a gain of 0.4% in January.

The seasonally adjusted value of new orders received in February increased 0.9% to \$21,831.3 million from the revised January estimate of \$21,645.9 million.

The seasonally adjusted unfilled orders backlog at the end of February totalled \$24,617.2 million, up 1.4% from the revised January estimate of \$24,282.4 million.

Seasonally adjusted inventories owned by manufacturers at the end of February reached \$34,676.8 million, up 1.1% from the previous month's revised value of \$34,313.1 million.

The ratio of seasonally adjusted total inventory owned to seasonally adjusted shipments rose from 1.59:1 in January to 1.61:1 in February.

Not adjusted for seasonal variation, manufacturers' shipments in February 1986 were estimated at \$20,119.2 million, 0.1% higher than the revised January value of \$20,102.7 million. Cumulative shipments for the first two months of 1986, at an estimated \$40,221.9 million, were up 9.1% from the \$36,880.8 million estimated for the same period in 1985.

Order the February 1986 issue of *Inventories, Shipments and Orders in Manufacturing Industries* (31-001, \$15/\$150).

## Consumer Price Index

The all-items Consumer Price Index (CPI) for Canada increased by 0.2% between February and March to reach a level of 130.9 (1981=100). This was the lowest monthly increase since September 1985. In the latest month, six of the seven major component indexes registered increases while the transportation index fell by 0.5%. The largest contribution to the upward pressure on the all-items index came from a rise of 0.3% in the housing index followed by an increase of 0.9% in the clothing index.

Seasonally adjusted, the all-items index rose by 0.2% between February and March.

The year-to-year increase in the CPI from March 1985 to March 1986 was 4.1%, unchanged from that reported in the 12-month period ending in February and

(continued on page 2, col. 1)

## LATEST MONTHLY STATISTICS

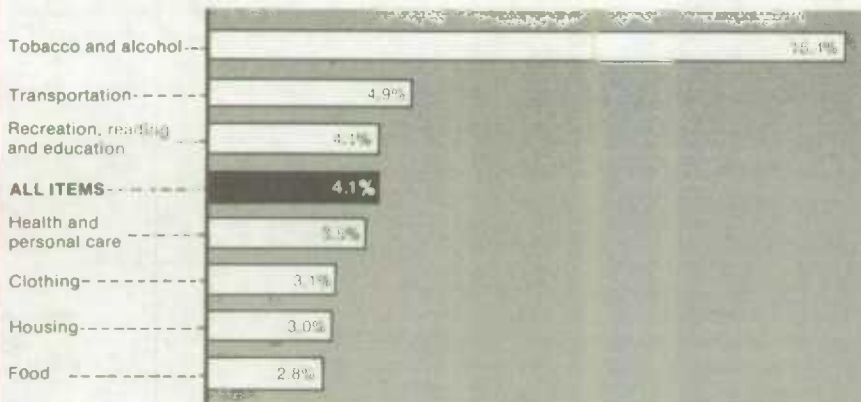
			Previous Month	From Year Ago
<b>EMPLOYMENT, INCOME</b>				
Average Weekly Earnings (\$)	Jan.	427.59	424.32	3.9
Labour Income (\$ million)	Jan.	20,891.3	21,111.7	7.1
Persons with Jobs (million)	Mar.	11.30	11.25	4.0
Unemployed	Mar.	1,380,000	1,341,000	-10.7
<b>INVENTORIES</b>				
Department Store (\$ million)	Jan.	3,580.3	3,536.6	18.9
Manufacturers' Owned (\$ million)	Feb.*	34,982.5	34,421.0	2.9
<b>ORDERS</b>				
Manufacturers' New Orders (\$ million)	Feb.*	20,631.1	20,597.8	11.1
Manufacturers' Unfilled Orders (\$ million)	Feb.*	24,703.2	24,191.4	5.0
<b>PRICES</b>				
Consumer Price Index (1981 = 100)	Mar.*	130.9	130.6	4.1
New House Price Index (1981 = 100)	Feb.	100.6	99.4	5.9
Raw Materials Price Index (1981 = 100)	Feb.	105.5	115.4	-10.6
Excl. coal, crude oil, nat. gas	Feb.	102.2	103.3	1.0
Industrial Product Price Index (1981 = 100)	Feb.	120.5	120.7	2.4
<b>CONSTRUCTION</b>				
Building Permits (\$ million)	Jan.*	943.3	943.3	21.8
Housing Starts - Urban Centres (units)	Jan.	9,335	9,335	21.8
<b>ENERGY</b>				
Coal Production (thousand tonnes)	Jan.	5 596	5 596	4.7
Electricity Generation (gigawatt hours)	Jan.	45 515	45 515	3.3
Natural Gas Production (million cubic metres)	Dec.	10 345	96 418	7.1
Petroleum Refining (thousand cubic metres)	Feb.*	6 765	14 413	7.2
<b>FOREIGN TRADE</b>				
Exports - Balance of Payments Basis (\$ million)	Feb.	9,453	19,456	6.3
Imports - Balance of Payments Basis (\$ million)	Feb.	9,425	18,445	20.3
<b>PRODUCTION</b>				
Railway Carloadings (million tonnes)	Jan.	19.3	19.3	5.0
Steel (ingots - thousand tonnes)	Dec.	1 200	14 533	-0.1
<b>SALES</b>				
Department Store Sales (\$ million)	Feb.*	696.0	1,458.7	8.9
Manufacturers' Shipments (\$ million)	Feb.*	20,119.2	40,221.9	9.1
New Motor Vehicle Sales (\$ million)	Feb.	1,537.5	2,877.4	22.2
Retail Sales (\$ million)	Feb.	9,126.6	18,758.1	11.5

Statistics are in current dollars and are not seasonally adjusted.

\* - new this week.

## Percentage Change in the Consumer Price Index and its Major Components

March 1985 to March 1986



Source: Statistics Canada, The Consumer Price Index (62-001)

Canada

## ... Consumer Price Index

remaining close to the 4.0% average annual increase for 1985 as a whole. The compounded annual rate based on the seasonally adjusted indexes for the previous three-month period (December 1985 to March 1986) was 3.4%, down markedly from the 5.1% compounded rate based on the three-month period ending in February.

### Food

Between February and March, the food index rose by 0.2%, following a decline of 0.6% observed between January and February. The latest increase resulted from a marginal rise (0.1%) in the index for food purchased from stores and a 0.3% increase in the index for food purchased from restaurants.

Over the 12-month period ending in March, the food index rose by 2.8%, a faster rate than the 2.4% observed in the 12-month period ending in February. The latest increase resulted from advances of 2.4% in the index for food purchased from stores and 4.4% in the index for food purchased from restaurants.

### All-items Excluding Food

On a month-to-month basis, the all-items excluding food index rose by 0.3% in March, down sharply from the increase of 0.6% observed in February. A considerable part of the upward pressure in March came from an advance of 0.3% in the housing index although increases in the indexes for clothing, recreation, reading and education, and tobacco products and alcoholic beverages also exerted a significant upward influence. A fall of 0.5% in the transportation index, due principally to a 5.3% decline in gasoline prices resulting from lower prices for crude petroleum, exerted a noticeable dampening effect on the overall rise in the all-items excluding food index.

The rise of 0.3% in the housing index was the net result of a number of factors. New house prices, costs of homeowners' insurance and of maintenance, and prices for selected household furnishings and equipment increased.

The transportation index fell by 0.5% and exerted a strong downward pull on the overall rise in the all-items excluding food index. The decline was largely due to a relatively sharp fall in gasoline prices. However, the full effect of that decline was somewhat moderated by increases in automobile insurance premiums, automobile rental and leasing charges, local commuting fares and most noticeably, air fares.

Over the 12-month period, March 1985 to March 1986, the all-items excluding food index rose by 4.5%, marginally less than the 4.6% increase reported in the previous 12-month period ending in February.

### Goods and Services

The goods index fell by 0.2% in March (largely due to lower prices for gasoline, fuel oil, and selected food components), while the services index advanced by 0.7%. Between March 1985 and March 1986, the goods index increased by 3.6% and the services index by 4.8%.

Order the March 1986 issue of *The Consumer Price Index* (62-001, \$8/\$80).

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## Weekly Bulletin

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## Building Construction Activity

The leading indicator of building construction activity in Canada (1981=100) recovered (+0.5%) in December to 92.5 after registering two consecutive monthly drops. The increase of the total index was attributable to strength in the residential sector.

The filtered index of residential construction moved up 1.7% to 106.6 in December from a revised index of 104.8 in November. This advance stemmed from continued increases in the single-family dwelling sector, while the level remained unchanged in the multi-family dwelling sector. The trend-cycle of residential permits issued declined in the Atlantic provinces, showed little change in British Columbia and increased in all other regions.

The filtered index of non-residential construction (excluding engineering projects) continued to decline in December, down 1.0% to 77.7 from a revised index of 78.5 in November. A decrease in the commercial component (-2.9%) was responsible for the drop of the non-residential index, as both the industrial (+4.6%) and public sector (+0.2%) indexes recorded increases. The trend-cycle of non-residential permits issued was down in the Prairies, up in Ontario, British Columbia and the Atlantic provinces and remained unchanged in Quebec.

Order the January 1986 issue of *Building Permits* (64-001, \$20/\$200), or contact  
Lizette Gervais-Simard (613-990-9689).

## Restaurants, Caterers and Taverns

Restaurant, caterer and tavern receipts totalled \$887.4 million for February 1986, an increase of 11.5% over the \$796.1 million reported for the same period in 1985.

Order the February 1986 issue of *Restaurants, Caterers and Taverns* (63-011, \$5/\$50).

## Department Store Sales and Stocks

### Unadjusted Sales

Department stores in Canada reported unadjusted sales totalling \$696.0 million in February 1986, up 7.6% from the February 1985 level. Sales were higher in 30 of the 40 departments for which information is compiled, with the largest increases reported in floor coverings (+27.7%), boys' clothing and furnishings (+23.2%), lamps, pictures, mirrors and all other home furnishings (+21.4%) and furniture (+20.1%). The most notable decreases were recorded for millinery (-22.7%), smallwares and notions (-15.5%), sporting goods and luggage (-10.6%) and furs (-10.6%).

All provinces posted gains in February 1986 over the corresponding month in 1985, with increases ranging from 10.2% in Alberta to 3.3% in Saskatchewan. Sales also rose in all 10 metropolitan areas surveyed, with increases ranging from 11.3% in Toronto to 1.1% in Quebec City.

Sales by major department stores in February 1986 reached \$436.6 million, up 6.7% from the corresponding month a year earlier, while junior department stores had sales of \$259.4 million, up 9.0% over the same period last year.

### Stocks

The unadjusted selling value of inventories held by department stores in February 1986 was \$3,722.7 million, up 25.3% from February 1985. Seasonally adjusted department store stocks totalled \$4,106.7 million, up 3.6% from the January 1986 revised value of \$3,965.7 million.

Order the February 1986 issue of *Department Store Sales and Stocks* (63-002, \$13/\$130).

## Federal Government Employment

Employees of the federal government (including members of the Canadian Armed Forces) and government enterprises numbered 587,910 as of December 1985, an overall increase of 4,096 (0.7%) from December 1984. General government employees increased by 3,322 (0.9%), while those in government enterprises (including the Canada Post Corporation) grew by 774 (0.4%).

The increase in general government employment was mainly in National Defence, National Revenue and National Health and Welfare and in the form of term employment in these departments. The departments that reported major year-over-year decreases were Public Works, Employment and Immigration, Fisheries and Oceans, and Atomic Energy of Canada Limited.

Gross payroll (including overtime and retroactive payments) for October-December 1985 was \$4,576.1 million, an increase of \$161.9 million (3.7%) over the corresponding quarter in 1984.

Order the October-December 1985 issue of *Federal Government Employment* (72-004, \$20/\$80), or contact T. Moore (613-990-8306) or M. Fathy (613-991-1843).

## Building Permits

The seasonally adjusted value of building permits issued by Canadian municipalities in January 1986 increased 10.2% to \$1,779.8 million from \$1,614.5 million in December. A significant gain registered in the residential sector more than offset a decrease in the non-residential sector.

After three consecutive monthly declines, the seasonally adjusted value of residential building permits rebounded by 23.9% in January to \$1,122.6 million from \$906.7 million in December. The January 1986 level shows a 68.1% increase over January 1985, which posted a weak \$667.7 million. This recovery was almost entirely due to the strengthening of intentions recorded in the single-family dwelling sector. On a seasonally adjusted basis, 16,732 units were approved in January (11,293 single detached and 5,439 multiple dwellings), up 28.4% from the 13,039 units authorized in December (8,211 single detached and 4,828 multiple dwellings). In annual terms, these approvals represent 200,800 units in January and 156,400 units in December. Residential building permits in January showed increases in all regions except for the Atlantic provinces.

The seasonally adjusted value of non-residential projects in January slipped to \$657.2 million, down 7.2% from 708.4 million in December. The industrial (-26.7%) and commercial (-15.5%) components showed a marked decline while public intentions (+54.3%) rose sharply. The Prairies and Quebec were responsible for the overall drop of non-residential permits in January.

Order the January 1986 issue of *Building Permits* (64-001, \$20/\$200), or contact Gaétan Lemay (613-990-9689).

## Provincial and Territorial Government Employment

Employees of provincial and territorial governments and government enterprises numbered 632,173 as of December 1985, an overall increase of 11,631 (1.9%) from December 1984. General government employees increased by 9,757 (2.1%) while those in government enterprises increased by 1,874 (1.2%).

The number of general government employees totalled 473,772 - comprising 296,526 in departments and ministries; 138,488 in government institutions; and 38,758 in other special funds. Government enterprise employment was 158,401.

Gross payroll (including overtime and retroactive payments) for October-December 1985 was \$4,437.3 million, an increase of \$196.2 million (4.6%) from the corresponding quarter in 1984.

General government gross payroll was \$3,132.4 million, of which \$2,064.4 million was for government departments and ministries; \$803.7 million for government institutions and \$264.3 million for other special funds. Government enterprise gross payroll was \$1,304.9 million.

Order the fourth quarter 1985 issue of *Provincial and Territorial Government Employment* (72-007, \$15/\$60).



## Market Research Handbook, 1985-86

The new Handbook's 838 pages are filled with invaluable information - a total of 55 charts, 36 maps and over 260 detailed tables present marketing data essential to planners in business or industry.

Extensive economic and demographic data include: selected economic indicators; government revenues, expenditures and employment at all levels; trends in merchandising and services; population characteristics, personal income and expenditures; and housing, motor vehicles, household facilities and equipment.

The Handbook also features an index of major subjects and a glossary of technical terms.

Order the 1985-86 *Market Research Handbook* (63-224, \$75), or contact Maurice Massaad (613-991-3549), Industry Division.

## Union Wage Rate Index

The Canada total Union Wage Rate Index (1981=100) for construction trades (including supplements) registered no change between March 1986 and February 1986, remaining at a revised level of 132.2.

Comparing March 1986 with the same month in 1985, wage rates at 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, Newfoundland and British Columbia increased 4.4% on average. Indexes advanced 2.4% in Saint John and 2.0% in Winnipeg while in Alberta and Saskatchewan increases were less than 1%.

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

## Sales of Natural Gas

During February 1986, sales of natural gas by main distributors amounted to 5 848 843 thousand cubic metres, a 0.2% decrease from the level recorded the previous year.

On the basis of rate structure information, with the percentage change from February 1985 in brackets, sales were broken down as follows: residential sales, 1 893 718 thousand cubic metres (-1.6%); commercial sales, 1 535 756 thousand cubic metres (-2.7%) and industrial sales, 2 419 369 thousand cubic metres (+2.5%).

### Year-to-date

For the first two months of 1986, sales of natural gas amounted to 12 049 074 cubic metres, a 1.2% decrease from the level recorded during the same period of 1985.

On the basis of rate structure information, with the percentage change from January-February 1985 in brackets, sales were broken down as follows: residential sales, 3 886 291 thousand cubic metres (-2.0%); commercial sales, 3 117 799 thousand cubic metres (-4.7%) and industrial sales, 5 044 984 thousand cubic metres (+1.7%).

Order the February 1986 issue of *Gas Utilities* (55-002, \$10/\$100).

## Sales of Refined Petroleum Products

Preliminary figures show that in February 1986, sales of refined petroleum products in Canada amounted to 6 116 900 cubic metres, up 0.1% from a year earlier. Cumulative figures for the first two months of 1986 show sales of petroleum products were down 2.0% from the 1985 level.

Sales of the main products in the latest month, with the percentage change from February 1985 in brackets, were as follows: motor gasoline, 2 273 000 cubic metres (-2.0%); kerosene stove oil, 94 600 cubic metres (-15.9%); diesel fuel, 1 061 100 cubic metres (+1.1%); light fuel oil, 1 036 400 cubic metres (-8.0%) and heavy fuel oil, 563 700 cubic metres (-1.3%).


Production of petroleum products by Canadian refiners amounted to 6 765 200 cubic metres, up 6.9% from February 1985.

### Year-to-date

For the first two months of 1986, sales of refined petroleum products amounted to 12 722 928 cubic metres. Year-to-date sales of the main products with the percentage change from January-February 1985 in brackets, were as follows: motor gasoline, 4 727 723 cubic metres (-2.4%); kerosene stove oil, 206 280 cubic metres (-18.6%); diesel fuel, 2 176 576 cubic metres (+4.8%); light fuel oil, 2 190 674 cubic metres (-14.3%) and heavy fuel oil, 1 127 866 cubic metres (-9.8%).

Year-to-date production of petroleum products by Canadian refiners amounted to 14 412 640 cubic metres, up 7.2% from the same period in 1985.

Order the February 1986 issue of *Refined Petroleum Products* (45-004, \$15/\$150), or contact Gérard O'Connor (613-991-3562), Energy Section, Industry Division.

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