

# I·N·F·O·M·A·T

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

Friday, February 13, 1987

### OVERVIEW

#### ■ Trade Surplus Continued to Decline in 1986

The 1986 merchandise trade surplus was down to \$9.6 billion, as the growth of imports continued to exceed the growth of exports.

#### ■ Growth Rate of Labour Income Slows Again

The growth rate of labour income in November indicates a return to the downward trend observed in the first eight months of 1986.

#### ■ Record Number of Foreign Tourists in 1986

Expo 86 was the main tourist attraction in Canada during 1986, but the number of foreign visitors was up significantly before it opened and after it closed.

#### ■ Motor Vehicle Sales Down Slightly in 1986

New motor vehicle unit sales were down 1.3%, as lower passenger car sales offset the increase in commercial vehicle sales.

#### ■ Unemployment Rate Increases

Following several months of little change, the unemployment rate rose to 9.7% in January. This was the first increase since July 1986.

#### ■ Help-wanted Index Continues to Climb

After a retreat in December, the help-wanted index advanced 11.8% in January, to 104.

**This issue also includes** information from the Canadian Renal Failure Register.

#### Trade Surplus Continued to Decline in 1986

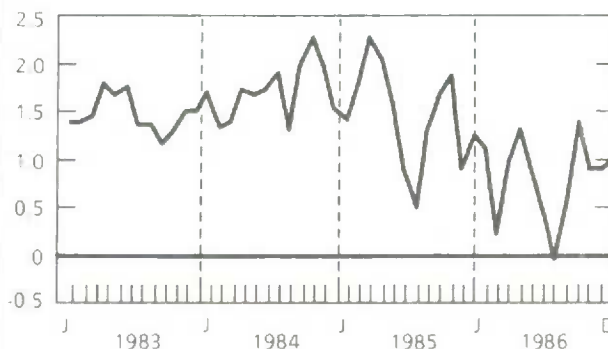
Preliminary estimates of Canada's merchandise trade for 1986 show total exports of \$121.1 billion, a marginal increase of 0.7% over the previous year. Imports were estimated at \$111.5 billion, up 8.5% from 1985. This marks the fourth consecutive year in which the growth of imports has exceeded the growth of exports. As a result, the trade surplus declined to \$9.6 billion, the lowest level since 1981.

The performance of Canadian exports in 1986 seems to have been affected by the notable slide in energy prices in the first half of 1986. All other commodity groupings showed higher exports in 1986, with gains ranging from \$162 million for agricultural and fish products, to \$1.6 billion for forestry products. However, a \$5.2 billion drop in energy products offset all increases and resulted in only a modest rise in total Canadian exports.

(continued on page 2)

#### Merchandise Trade Balance

(billions of dollars, seasonally adjusted)



Statistics  
Canada

Statistique  
Canada

Canada

## ... Merchandise Trade

The major part of our energy exports are to the United States. The drop in Canada's trade surplus with the U.S. to \$16.2 billion in 1986 from \$20.7 billion in 1985 can be linked to declining prices for energy products. Exports of crude petroleum, in particular, had a significantly lower value in 1986, despite an increase in volume of approximately 20%. Other energy products such as natural gas, electricity, and petroleum and coal products registered a decline in quantities exported, as well as value.

A higher value of imports of machinery and equipment (+\$3.2 billion), industrial goods (+\$1.8 billion) and automotive products (+\$1.7 billion) provided most of the upward pressure for total imports. As in the case of exports, energy products were the only commodity grouping to show a decline in imports.

The merchandise trade deficit with Japan rose to \$1.5 billion in 1986 from \$128 million in the previous year. This advance was a function of rising import values rather than declining exports. Imports were up

### Merchandise Trade

	1982	1983	1984	1985	1986
	% change, previous year				
Imports	-13.5	9.5	25.2	12.3	8.5
Exports	0.2	7.3	23.7	7.2	0.7
	change, previous year				
Balance (millions \$)	10,529	-174	3,078	-3,251	-7,913

25%, while exports gained a modest 2%. Automotive products showed a large increase in the value of imports, but data on new motor vehicles indicate only a slight increase in volumes. Although there were a number of contributing factors, the sharp appreciation in the value of the Japanese yen appears to be the most significant.

For further information, contact International Trade Division at (613) 990-9787.

## Growth Rate of Labour Income Slows Again

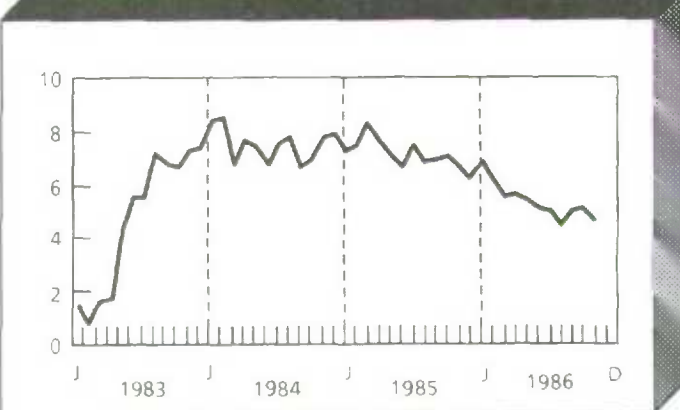
The preliminary estimate of labour income for November 1986 was \$22.6 billion, an increase of 4.6% from November 1985. Following larger year-over-year increases in September and October, the growth rate of labour income in the current month indicates a return to the downward trend observed from January to August. The average year-over-year growth for the first ten months of 1986 was 5.9%.

Overall, the growth rate of wages and salaries in the service-producing industries has been relatively stable throughout 1986. The year-over-year increase in November was 5.7%, similar to the rates of growth observed in the previous ten months. Since July 1986, the trade industry has shown stronger rates of increase in wages and salaries than those recorded in the first two quarters, while transportation, communication and other utilities have shown smaller increases.

The goods-producing industries have restricted the growth of total labour income. They have registered progressively smaller year-over-year increases in wages and salaries since January 1986, dropping to 1.6% in November from 8.4% in January. In

### Labour Income

(% change, previous year)



November, wages and salaries in mines, quarries and oil wells decreased on a year-over-year basis for the seventh consecutive month (-11.2%) and in forestry for the fourth consecutive month (-14.8%). Following an advance of 4.8% in October, the growth rate of manufacturing wages and salaries was 2.9% in November, the smallest increase recorded in 1986.

For further information, contact Labour Division at (613) 991-4051.

## Record Number of Foreign Tourists in 1986

Contrary to traditional patterns, the number of visits to Canada by non-residents was higher in December than it was in November. Normally the number of visitors decreases from a peak of approximately 6 million a month in July or August, to less than 2 million in January. The total number of visits was up 1.4% from November 1986 and 18.8% from December 1985. At 2.2 million, this was the highest December level since 1980.

The number of foreign visitors has shown large year-over-year gains since the start of 1986, particularly travellers entering Canada for one or more nights. During the year, 16.2 million non-residents stayed in Canada for at least one night or longer, rising 17.8% from 1985. Residents of the United States accounted for 14.1 million of these trips, 16.8% higher

### International Travel

	1982	1983	1984	1985	1986
	% change, previous year				
Foreign visitors from					
United States	-18.5	0.1	1.5	3.5	12.0
Other countries	-7.9	-10.1	6.3	-4.2	25.0
All countries	-18.0	-0.4	1.8	3.0	12.6
Canadian re-entries from					
United States	-0.8	17.0	-5.6	1.8	1.8
Other countries	0.8	17.7	14.8	14.4	-0.7
All countries	-0.7	17.0	-4.8	2.4	1.7

For further information, contact International and Financial Economics Division at (613) 990-8933.

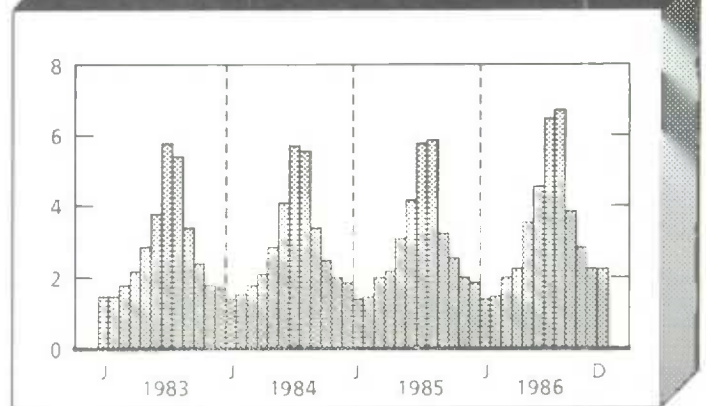
## Motor Vehicle Sales Down Slightly

Following three years of strong growth, total unit sales of new motor vehicles were down slightly (-1.3%) in 1986. Passenger car sales were the source of this decline, as manufacturers in North America, Japan and other overseas countries reported lower sales. Down 4.1% from the previous year, 1.1 million units were sold in 1986.

North American-built passenger car sales declined 4.2%, continuing the trend to slower growth evident since 1984. Despite this decrease, North American manufacturers held 69.8% of the passenger car market, unchanged from 1985.

Japanese passenger car sales were also down, but only by 0.4% for the year. Unit sales of 198,410 represented 18.2% of the passenger car market, up

Foreign Visitors  
(millions)



than 1985, while the number of tourists from countries other than the U.S. was up almost 25%. The main attraction was Expo 86.

This was the first year since 1981 when the number of foreign visitors to Canada exceeded the number of Canadian residents travelling abroad. This situation may be partially attributable to the decline in the Canadian dollar relative to other currencies and the drawing power of Expo 86. Overall, the number of Canadians returning to Canada during the year increased by 1.7%, down slightly from the 2.4% growth in 1985. The number of Canadians returning from trips to countries other than the U.S. actually decreased (-0.7%), a marked change from the growth rates greater than 14% recorded in the three preceding years.

### Motor Vehicle Sales

	1982	1983	1984	1985	1986
	% change, previous year				
Passenger cars	-21.1	18.2	15.2	17.1	-4.1
North America	-24.3	27.7	16.0	9.7	-4.2
Japan	-14.2	-0.9	-3.0	16.4	-0.4
Other countries	-7.5	-9.1	80.0	90.5	-8.5
Commercial vehicles	-27.6	14.6	31.3	25.9	6.8

0.6 percentage points from 1985. This increase was attributable to a decrease in the market share held by other overseas manufacturers.

(continued on page 4)



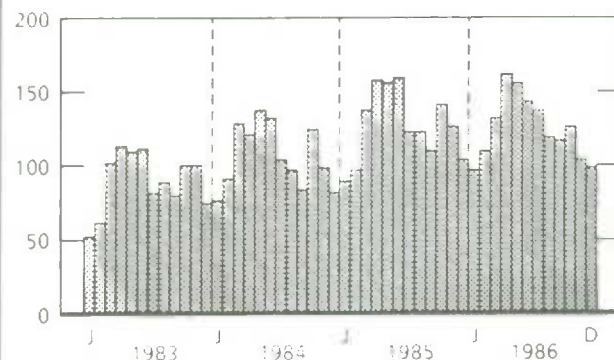
## ... Motor Vehicles

After registering phenomenal growth in 1984 and 1985, unit sales of cars manufactured in countries other than Canada, United States and Japan dropped 8.5% in 1986. This decline was the result of lower sales of South Korean products (-11.4%) and, to a lesser extent, European cars (-4.9%).

Sales of commercial vehicles advanced 6.8% in 1986, a smaller increase than those recorded from 1983 to 1985, but a continuation of the trend of rising sales. The 419,833 commercial vehicles sold in 1986 accounted for 28% of total new vehicle unit sales, the highest proportion since 1979.

The estimated dollar value of sales indicates that North American car sales advanced by approximately 3.4%, while Japanese passenger car sales rose 19.2%. The declining value of the Canadian dollar relative to other currencies was a major factor in this increase, in particular, the sharp rise in value of the Japanese yen during the year.

**Motor Vehicle Sales**  
(thousands of units)



For further information, contact Industry Division at (613) 990-9682.

## Unemployment Rate Increases

The Labour Force Survey for January indicated that the seasonally adjusted unemployment rate rose to 9.7%, following several months of little change. The increase in the unemployment rate was the result of a large increase in the labour force (72,000). Employment rose by 31,000, but there were an additional 41,000 people looking for work in January.

Employment increased for the sixth consecutive month, with the advance concentrated among young people aged 15 to 24, particularly females. Since July, gains in employment have totalled 191,000.

Following two months of little change, the seasonally adjusted level of unemployment rose by 41,000, to 1,255,000 in January. The rise in unemployment was especially noticeable for females 25 years of age and over, as an additional 39,000 persons in this group were looking for work.

**Unemployment Rate**

(percent, seasonally adjusted)



The seasonally adjusted unemployment rate rose by 0.3 percentage points in January. The increase was attributable to a rise of 0.4 among persons aged 25 and over, causing the rate for this age group to increase to 8.3%. Women in this age group contributed largely to this increase. The rate for young people declined to 14.4%.

For further information, contact Household Surveys Division at (613) 991-4720.

### Labour Force

	Sept.	Oct.	Nov.	Dec.	Jan.
	Change, previous month				
Labour force ('000)	3	4	9	52	72
Employment ('000)	32	15	5	51	31
15-24 years ('000)	-23	-15	14	-8	28
25 years & over ('000)	55	30	-9	59	3
Unemployment ('000)	-29	-11	4	1	41
Unemployment rate	9.5	9.4	9.4	9.4	9.7

## Help-wanted Index

- In January, the seasonally adjusted Help-wanted index for Canada (1981 = 100) advanced 11.8%, to 104.
- Following two consecutive decreases, the index for the Atlantic region rose to 138 in January.
- The index for Quebec climbed to 105, after a sharp drop in December. Ontario was the only region that registered an increase in December.
- The demand for labour in Ontario, as measured by this index was strong throughout 1986. In January 1987, the index increased to 145, its fourth consecutive advance.
- The index for the Prairie provinces was 48, the highest level recorded since April 1982.

### Help-wanted Index (1981 = 100)

	Sept.	Oct.	Nov.	Dec.	Jan.
	seasonally adjusted				
<b>Canada</b>	<b>85</b>	<b>92</b>	<b>103</b>	<b>93</b>	<b>104</b>
Atlantic Region	95	144	119	108	138
Quebec	98	102	121	97	105
Ontario	107	118	128	130	145
Prairie Region	43	42	46	44	48
British Columbia	41	43	40	37	39

- The index for British Columbia continued to hover around 40, as it has for the past 14 months.

*For further information, contact Labour Division at (613) 991-4045.*

## Canadian Renal Failure Register, 1985

- The number of patients under care for chronic renal failure continued to increase in 1985. The 72 renal failure treatment centres across Canada reported a total of 7,774 patients at the end of 1985, up 7.7% over 1984.
- Since 1981, the first year of operation of the present renal failure register, the rate per million population of patients under care has risen 29%, to 306.6 in 1985.
- The number of new patients entering treatment has increased annually, partially due to the acceptance of more older and diabetic patients.

- Patients with a functioning transplant increased to 3,502 (or 45%) in 1985, from 2,362 (or 41%) in 1981.
- The number of transplant operations performed rose 11.3%, to 737, but there was no reduction in the number of patients awaiting transplants (1,027).
- Just over half of the patients that started treatment in 1981 were still alive four years later. Patients in older age groups and those with diabetes had the poorest survival rate.
- Internationally, Canada had the third highest rate of new patients accepted for treatment and the fifth highest survival rate for patients with functioning transplants.

*For further information, contact Health Division at (613) 991-1774.*

## PUBLICATIONS RELEASED FROM FEBRUARY 6 – FEBRUARY 12

### AGRICULTURE AND NATURAL RESOURCES

**Apparent Per Capita Food Consumption in Canada – Part II, 1985.** Catalogue number 32-230 (Canada: \$25; Other Countries: \$26).

### EDUCATION, CULTURE AND TOURISM

**The Changing Labour Market for Postsecondary Graduates, 1975-1984.** Catalogue number 89-518 (Canada: \$26; Other Countries: \$27.50).

**Salaries and Salary Scales of Full-time Teaching Staff at Canadian Universities, 1986-1987.** Catalogue number 81-258P (Canada: \$15; Other Countries: \$16).

### HOUSEHOLD SURVEYS

**Historical Labour Force Statistics - Actual Data, Seasonal Factors, Seasonally Adjusted Data, 1986.** Catalogue number 71-201 (Canada: \$50; Other Countries: \$60).

### INDUSTRY

**Coal and Coke Statistics, October 1986.** Catalogue number 45-002 (Canada: \$8/\$80; Other Countries: \$9/\$90).

**Corrugated Boxes and Wrappers, December 1986.** Catalogue number 36-004 (Canada: \$4/\$40; Other Countries: \$5/\$50).

## PUBLICATIONS RELEASED – Concluded

### INDUSTRY – Continued

**Department Store Sales and Stocks**, October 1986. Catalogue number 63-002 (Canada: \$13/\$130; Other Countries: \$14/\$140).

**Electric Power Statistics**, November 1986. Catalogue number 57-001 (Canada: \$8/\$80; Other Countries: \$9/\$90).

**Footwear Statistics**, November 1986. Catalogue number 33-002 (Canada: \$4/\$40; Other Countries: \$5/\$50).

**New Motor Vehicle Sales**, October 1986. Catalogue number 63-007 (Canada: \$8/\$80; Other Countries: \$9/\$90).

**Oils and Fats**, November 1986. Catalogue number 32-006 (Canada: \$4/\$40; Other Countries: \$5/\$50).

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

**Other Manufacturing Industries – Other Instruments and Related Products Industry**, 1985 Census of Manufactures. Catalogue number 47-250B 3912 (Canada: \$4; Other Countries: \$5).

**Particleboard, Waferboard and Hardboard**, November 1986. Catalogue number 36-003 (Canada: \$4/\$40; Other Countries: \$5/\$50).

**Primary Iron and Steel**, November 1986. Catalogue number 41-001 (Canada: \$4/\$40; Other Countries: \$5/\$50).

**Production and Shipments of Steel Pipe, Tubing and Fittings**, November 1986. Catalogue number 41-011 (Canada: \$4/\$40; Other Countries: \$5/\$50).

**Production, Shipments and Stocks on Hand of Sawmills in British Columbia**, November 1986. Catalogue number 35-003 (Canada: \$6/\$60; Other Countries: \$7/\$70).

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

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

**Stocks of Frozen Meat Products**, January 1987. Catalogue number 32-012 (Canada: \$10/\$100; Other Countries: \$11/\$110).

### INDUSTRY – Concluded

**Wholesale Trade**, November 1986. Catalogue number 63-008 (Canada: \$5/\$50; Other Countries: \$6/\$60).

### INDUSTRIAL ORGANIZATION AND FINANCE

**Corporation Financial Statistics**, 1984. Catalogue number 61-207 (Canada: \$50; Other Countries: \$51.50).

**Industrial Corporations: Financial Statistics**, Third Quarter 1986. Catalogue number 61-003 (Canada: \$50/\$200; Other Countries: \$60/\$240).

### INTERNATIONAL TRADE

**Imports by Commodities**, November 1986. Catalogue number 65-007 (Canada: \$50/\$500; Other Countries: \$60/\$600).

**Preliminary Statement – Canadian International Trade**, December 1986. Catalogue number 65-001P (Canada: \$5/\$50; Other Countries: \$6/\$60).

### LABOUR

**Estimates of Labour Income**, July-September 1986. Catalogue number 72-005 (Canada: \$15/\$60; Other Countries: \$16/\$64).

**Unemployment Insurance Statistics**, November 1986. Catalogue number 73-001 (Canada: \$12/\$120; Other Countries: \$13/\$130).

### PUBLIC INSTITUTIONS

**Federal Government Employment**, July-September 1986. Catalogue number 72-004 (Canada: \$20/\$80; Other Countries: \$21/\$84).

### SCIENCE, TECHNOLOGY AND CAPITAL STOCK

**Housing Starts and Completions**, November 1986. Catalogue number 64-002 (Canada: \$15/\$150; Other Countries: \$16/\$160).

### TRANSPORTATION

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

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

**Railway Carloadings**, 7-day Period Ending January 21, 1987. Catalogue number 52-005 (Canada: \$75; Other Countries: \$100).



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### Maritime Provinces

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## LATEST MONTHLY STATISTICS

			Previous Month	% Change From Year Ago
<b>EMPLOYMENT, INCOME</b>				
Average Weekly Earnings (\$)	Nov.	433.63	434.03	2.0
Labour Income (\$ million)	Nov. *	22,626	22,890	4.6
Persons with Jobs (million)	Jan. *	11.33	11.56	1.2
Unemployed (million)	Jan. *	1.3	1.2	-0.4
<b>INVENTORIES</b>				
Department Store (\$ million)	Nov.	4,749	4,886	9.7
Manufacturers' Owned (\$ million)	Nov.	33,855	33,833	-1.6
<b>ORDERS</b>				
Manufacturers' New Orders (\$ million)	Nov.	20,495	21,917	-3.2
Manufacturers' Unfilled Orders (\$ million)	Nov.	23,824	24,044	-0.7
<b>PRICES</b>				
Consumer Price Index (1981 = 100)	Dec.	134.9	134.7	4.2
New House Price Index (1981 = 100)	Dec.	110.3	109.7	12.3
Raw Materials Price Index (1981 = 100)	Dec.	95.0	94.5	-19.6
Excl. mineral fuels	Dec.	104.9	105.3	3.2
Industrial Product Price Index (1981 = 100)	Dec.	119.8	119.8	-0.2
<b>CONSTRUCTION</b>				
			Year-to-date	
Building Permits (\$ million)	Oct.	2,166	20,441	24.4
Housing Starts - Urban Centres (units)	Nov.	15,536	156,647	23.3
<b>ENERGY</b>				
Coal Production (thousand tonnes)	Oct.	5,175	46,404	-8.5
Electricity Generation (gigawatt hours)	Nov.	41,066	411,042	2.3
Natural Gas Production (million cubic metres)	Oct.	8,899	84,670	-2.8
<b>FOREIGN TRADE</b>				
Exports - Balance of Payments Basis (\$ million)	Dec. *	10,030	121,079	0.7
Imports - Balance of Payments Basis (\$ million)	Dec. *	8,672	111,516	8.5
<b>SALES</b>				
Department Store Sales (\$ million)	Nov.	1,356	10,722	5.1
Manufacturers' Shipments (\$ million)	Nov.	20,715	229,514	2.3
New Motor Vehicle Sales (\$ million)	Dec. *	1,589	21,792	9.6
Refined Petroleum Products (thousand cubic metres)	Nov.	6,346	70,580	-0.1
Retail Sales (\$ million)	Nov.	12,378	125,400	7.9

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

## Infomat

## A Weekly Review

Published by the Communications Division (Director - Tim Davis), Statistics Canada.

Senior Editor: Greg Thomson (613) 991-1103

Editor: Linda McCormick (613) 991-1088

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 Publication Sales, Statistics Canada, Ottawa, Ontario K1A 0T6, or telephone Publication Sales at (613) 993-7276.

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