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

 STATISTICS STATISTIQUE
CANADA CANADA

Friday, May 22, 1987

MAY 22 1987

OVERVIEW

■ Travel Account Deficit Up Sharply

Following a reduction in the travel account deficit in 1986, the deficit rose 14.7% in the first quarter of 1987, to \$1.7 billion.

■ Canada's Population Growing at an Annual Rate of 0.85%

Even though the growth rate is considered to be low, it is actually near the top among industrialized countries.

■ Motor Vehicle Sales Strengthen

North American-built passenger car sales registered a second consecutive advance in March, rising 5.3% after gaining 5.2% in February.

■ Rise in Consumer Price Index Moderated by Stable Food Prices

After posting a decrease of 0.1% in March, the food component was unchanged in April and helped to offset increases in the six other major components of the CPI.

■ Labour Market Reflects Economic Growth

A recent study indicated that the number of persons on the margins of the labour force – people who want work, but are not looking – dropped for the fourth consecutive year in March 1987.

■ This issue also includes articles on the Farm Input Price Index and Farm Cash Receipts.

Travel Account Deficit Up Sharply

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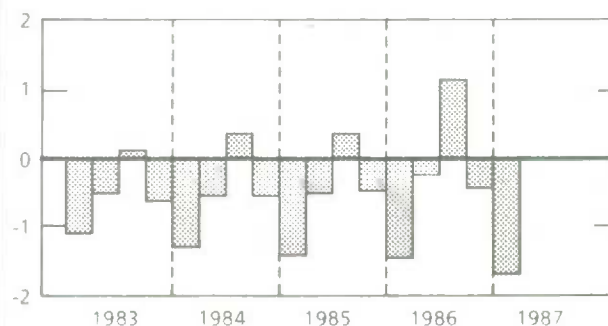
Preliminary estimates for the first quarter of 1987 show that Canada's deficit on the travel account, which records payments by Canadians travelling abroad and receipts from international visitors to Canada, was \$1.7 billion. Traditionally, the largest deficit on the travel account occurs in the first quarter when Canadians vacation in warmer climates and tourism to Canada drops to its lowest level.

Total payments by Canadians travelling abroad increased 12.9% (to \$2.4 billion), from the first quarter of 1986. Almost 60% of these payments were made by Canadians travelling to the United States. The growth of expenditures by Canadians travelling to the U.S. continued to accelerate, rising 10.3% over the first quarter of 1986. Payments by Canadian travellers in the U.S. registered modest growth throughout 1986, increasing 6.5% during the year.

(continued on page 2)

Travel Account Balance

(billions of dollars)


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Canada

... Travel Account

In the first quarter of 1987, receipts totalled \$707 million, only 8.6% higher than in the same period of 1986. Although earnings grew in the current quarter, the rate of increase was significantly lower than those recorded in 1986. Earnings from U.S. residents were up 4.8%, while those from all other countries advanced 17.5%.

In 1986, Canadian earnings (receipts) from international travel rose 26.5% over the previous year. This increase was mainly due to an improvement in the travel account with the United States. In fact, receipts from U.S. residents exceeded payments by Canadians for the first time since 1974, giving Canada a small surplus of \$77 million.

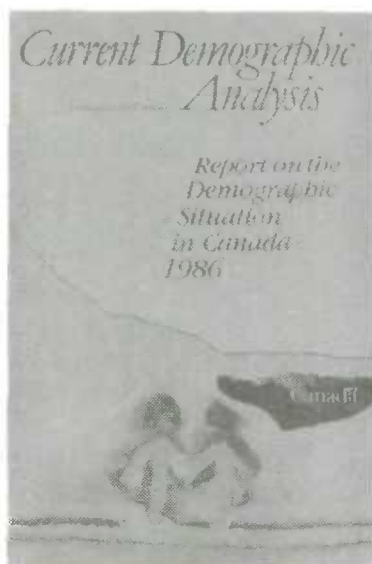
For further information, contact Education, Culture and Tourism Division at (613) 990-8932.

Travel Account

First quarter	1982	1984	1985	1986	1987
	millions of dollars				
United States					
Receipts	265	337	370	457	479
Payments	1,036	1,202	1,230	1,303	1,437
Balance	-771	-865	-860	-846	-958
All other countries					
Receipts	121	144	148	194	228
Payments	494	634	728	834	975
Balance	-373	-490	-580	-640	-747
All countries balance	-1,144	-1,355	-1,440	-1,486	-1,705

Canada's Population Growing at an Annual Rate of 0.85%

The Census of Population and Housing conducted in June 1986 put Canada's population at 25.4 million. The average annual increase in the Canadian population was 0.85% from 1981 to 1986. This was the lowest rate recorded since the slowdown in population growth began 25 years ago. From a high of about 3% in the 1950s, the average annual rate of increase fell gradually to 2% in the 1960s, 1.3% in the 1970s, and to 1% for the 1981-1986 period. One has to go back to the Great Depression of the 1930s to find such a low rate of increase.



Even though the growth rate is considered to be low, it is actually near the top among industrialized countries. For the period 1980-1984, only Australia had a higher growth rate.

The current pattern of fertility is characterized by stability at the national level. The total fertility rate over the first half of the 1980s has hovered around 1.7 births per woman – below the replacement level of 2.1. With remarkable consistency over time, the average fertility of women born in the same year and married at age 18 is roughly twice as high as that of women married at age 30. The proportion of women who marry at a later age has been rising in recent years.

Population movements, both into and within Canada, have recently hit very low levels. The number of immigrants to Canada in 1985 was among the lowest of any year in the post-war era. The average age of immigrants has also increased. In 1984, Canada admitted more immigrants at retirement age or older than immigrants under five years of age.

After several years of heavy losses, Quebec has almost reached parity between in- and out-migration. Of special note is the fact that British Columbia recorded a period of negative net migration for the first time.

Since 1971, the share of anglophones in the country as a whole has increased, whereas that of francophones has diminished. However, in areas where francophones already constituted a majority, their proportion of the population has increased.

For further information, contact Demography Division at (613) 991-2327 or order *The Demographic Situation in Canada, 1986* (catalogue number 91-209E).

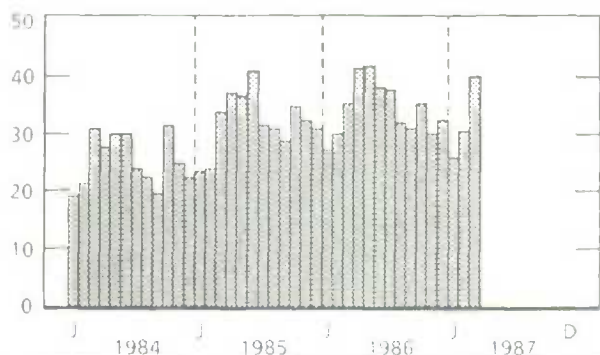
Motor Vehicle Sales Strengthen

Following several months of significant fluctuations, seasonally adjusted new motor vehicle sales increased 3.7% in March, over the revised February level. The March increase, the second consecutive one this year, was due to higher sales of passenger cars which more than offset a decline in the sales of commercial vehicles.

After a significant decrease in January and a marginal increase in February, sales of imported passenger cars increased by 8.9% in March. North American-built passenger cars registered their second consecutive monthly increase, rising by 5.3%. In spite of the overall national increase, total unit sales of passenger cars only rose in five provinces.

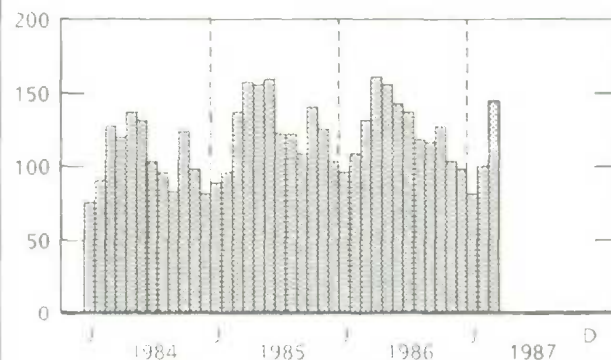
Actual sales of new motor vehicles totalled 145,891 units in March, 9.3% higher than in the same month of 1986. Passenger car sales rose 8.0% following five consecutive year-over-year declines. Commercial vehicle sales recorded a gain of 12.7%.

Commercial Vehicles
(thousands of units)



North American-built passenger car sales had their first significant year-over-year increase since November 1986, rising by 8.0%. The large year-over-year increase may be attributable to the fact that Easter fell in March last year, accounting for lower sales in March 1986. Based on unit sales, North American manufacturers held 68.5% of the passenger car market in March, virtually unchanged from a year earlier.

Motor Vehicle Sales
(thousands of units)



Unit sales of imported passenger cars rose 8.1% from their level in March 1986 as a surge in Japanese car sales (23.9%) offset sales decreases in South Korean (-26.0%) and European cars (-1.2%). The Japanese share of the passenger car market rose to 21.3%, from 18.6% a year earlier. Due to a decrease in the market share held by South Korea, manufacturers from other countries held 10.2% of the market in March 1987, down from 12.9% a year earlier.

For the first quarter of 1987, new vehicle sales totalled 330,452 units, down 3.3% from the same period last year. Sales of imported passenger cars had a modest increase of 0.7%, while domestic car sales declined 9.0%. Commercial vehicle sales totalled 98,366 units, up 4.0% from a year earlier.

Motor Vehicle Sales

	Nov.	Dec.	Jan.	Feb.	Mar.
	% change, previous year				
Passenger cars	-19.1	-6.9	-18.2	-12.9	8.0
North American	-18.9	-16.0	-21.8	-17.9	8.0
Japanese	-11.3	24.6	-11.9	23.9	23.9
Commercial vehicles	-7.1	4.1	-4.9	1.9	12.7

For further information, contact Industry Division at (613) 991-3549 or order New Motor Vehicle Sales (catalogue number 63-007).

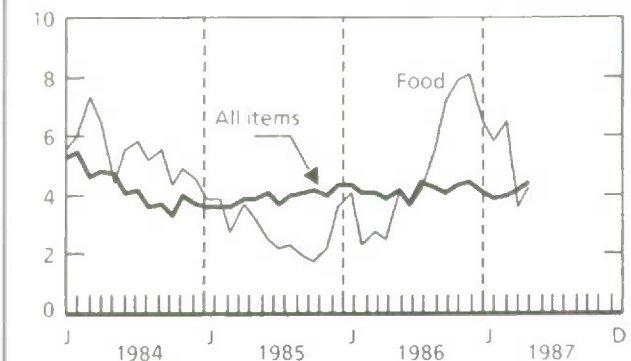
Rise in Consumer Price Index Moderated by Stable Food Prices

The Consumer Price Index (CPI, 1981 = 100) advanced by 0.4% in April. This increase equalled those observed for February and March which were the largest monthly advances experienced since November 1986. Six of the seven major components increased during the month, while stable food prices helped to moderate the overall increase. The year-to-year change in April was 4.5%, slightly higher than the 4.2% posted in the 12-month period ending in March.

After posting a decrease of 0.1% in March, the food index remained unchanged in April, as did its two major components: food purchased from stores and food purchased from restaurants. Over the 12-month period ending in April 1987, the food index advanced by 5.1% compared to the year-over-year increase of 6.2% recorded in March.

The all-items excluding food index rose 0.5% on a month-over-month basis in April compared to a rise of 0.6% in the preceding month. All component indexes showed advances during the month, ranging from a 0.1% increase for the transportation index to a

Consumer Price Index
(% change, previous year)



2.4% increase for the tobacco and alcohol index. The year-over-year change in the all-items excluding food index also accelerated in April, rising to 4.3% from 3.7% in March.

For further information, contact Prices Division at (613) 990-9606 or order the April 1987 issue of *The Consumer Price Index* (catalogue number 62-001).

Labour Market Reflects Economic Growth

A report in the April issue of *The Labour Force* (catalogue number 71-001) focuses on workers who are on the margins of the labour force – people who want work although they are not actively looking for it. Included in this "fringe" group are those often referred to as "discouraged workers" – people not seeking work because they believe none is available. This report attempts to provide insights into the characteristics of these two groups. Highlights from this report include:

- The number of persons on the margins of the labour force varies with changing economic conditions – rising in periods of weak economic activity and falling in periods of strong activity.
- Discouraged workers show proportionately more females, more older workers, and more persons with lower levels of education than unemployed persons.
- In March 1986, approximately 396,000 Canadians were on the margins of the labour force. By March 1987, this number registered its fourth consecutive yearly decline, falling to 359,000.
- Some 62% of persons on the margin of the labour force in March 1986 were not seeking work for market-related reasons: they were

either waiting for recall to a former job, waiting for replies from employers, or they simply believed no work was available. The remaining 38% cited personal and other reasons for their lack of job search (for example, going to school, illness or disability, personal or family responsibilities).

- In March 1986, about 53% of persons on the margins of the labour force were female. Females constitute 43% of the labour force.
- About 28% of persons on the margins of the labour force have fewer than nine years of education, compared with 11% of the labour force with that level of education.
- Approximately 61% come from the high-unemployment regions of Atlantic Canada and Quebec, while 33% of the labour force resides in these two regions.

For further information, contact Labour and Household Surveys Analysis Division at (613) 991-4624 or order the April 1987 issue of *The Labour Force* (catalogue number 71-001).

First Quarter Rise in the Farm Input Price Index

For the first quarter of 1987, the Farm Input Price Index (FIPI, 1981 = 100) stood at a preliminary level of 109.2, showing a 0.6% increase from the previous quarter. This increase matched the year-over-year movement of the FIPI. Of the nine major components which make up the FIPI, five rose and four declined.

At a national level, the animal production component experienced a 3.7% increase from the previous quarter mainly due to higher prices for feeder calves. Since the animal production component accounts for 33.2% of the total index, the increase in this sector had the greatest impact on the FIPI. Lower prices for petroleum products led to a 2.4% decline in the machinery and motor vehicles component.

In Eastern Canada, the FIPI was up 0.9% from the fourth quarter of 1986, while in Western Canada the increase was 0.1%. Although there has been a trend towards higher prices in general, the prices in Western Canada have tended to rise less than in the east.

The year-over-year movement was a magnification of the quarterly trends: the animal production component was up 8.6% from last year, while the machinery and motor vehicle component declined 7.1%. Property taxes rose 3.5% and farm rent fell 1.3%.

For further information, contact Prices Division at (613) 990-9607 or order the first quarter 1987 issue of Farm Input Price Indexes (catalogue number 62-004).

Farm Cash Receipts

Farm cash receipts for the first quarter of 1987 were estimated at \$4.5 billion, down 15.3% from the same period last year. Direct payments to producers made under various government programs and increased livestock and animal product receipts failed to offset a drop in crop receipts. Total crop receipts fell 37% from the first quarter of 1986.

Crop receipts fell to \$1.6 billion, mainly as a result of large declines in cereal and oilseed receipts and Canadian Wheat Board payments. Price declines, averaging 26%, led to cereal and oilseed receipts of only \$1.2 billion despite a 7% increase in marketings. Canadian Wheat Board payments for wheat, oats and barley totalled \$48.3 million, down sharply from last year's level of \$395.1 million.

Tobacco receipts were 41% below the 1986 level. This was due to lower marketings of flue-cured tobacco, reflecting smaller crops and a return to more normal marketing patterns.

Livestock and animal product receipts rose 2%, to \$2.5 billion, as declines in cattle and egg receipts

were offset by higher receipts for all other livestock and animal products. Hog receipts rose 7%, due to an increase in prices and marketings.

Larger fluid and industrial milk marketings, along with a slight increase in prices were responsible for the 2% advance in dairy receipts. Cattle receipts totalled \$807 million, a decline of 2% from last year. Higher cattle prices were unable to offset the decline in marketings.

Other cash receipts, including receipts from forest and maple products along with some direct program payments, totalled \$394 million, up 38% from last year. This increase was attributable to the first payment made under the Special Canadian Grains program.

For further information, contact Agriculture and Natural Resources Division at (613) 991-2439 or order the January-March 1987 issue of Farm Cash Receipts (catalogue number 21-001).

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TRAVEL

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LATEST MONTHLY STATISTICS

			Previous Month	% Change From Year Ago
EMPLOYMENT, INCOME				
Average Weekly Earnings (\$)	Feb.	439.16	438.01	2.5
Labour Income (\$ million)	Feb.	22,466	22,466	5.9
Persons with Jobs (million)	Apr.	11.64	11.51	1.1
Unemployed (million)	Apr.	1.3	1.4	-2.5
INVENTORIES				
Department Store (\$ million)	Feb.	3,907	3,641	4.9
Manufacturers' Owned (\$ million)	Feb.	34,103	33,848	-2.3
ORDERS				
Manufacturers' New Orders (\$ million)	Feb.	20,710	19,545	0.9
Manufacturers' Unfilled Orders (\$ million)	Feb.	23,998	23,588	-2.7
PRICES				
Consumer Price Index (1981 = 100)	Apr.*	137.0	136.4	4.5
New House Price Index (1981 = 100)	Mar.*	116.6	113.2	15.1
Raw Materials Price Index (1981 = 100)	Mar.	98.4	99.4	-0.1
Excl. mineral fuels	Mar.	104.0	104.1	0.7
Industrial Product Price Index (1981 = 100)	Mar.	120.4	119.8	0.2
CONSTRUCTION				
			Year-to-date	
Building Permits (\$ million)	Feb.	1,615	2,037	89.3
Housing Starts - Urban Centres (units)	Mar.*	14,214	38,365	47.6
ENERGY				
Coal Production (thousand tonnes)	Jan.	4,875	4,875	-12.9
Electricity Generation (gigawatt hours)	Feb.	43,447	90,424	4.2
Natural Gas Production (million cubic metres)	Jan.	10,752	10,752	-2.5
FOREIGN TRADE				
Exports - Balance of Payments Basis (\$ million)	Mar.	10,729	30,003	1.7
Imports - Balance of Payments Basis (\$ million)	Mar.	9,943	27,455	-1.3
SALES				
Department Store Sales (\$ million)	Mar.*	898	2,384	-0.05
Manufacturers' Shipments (\$ million)	Feb.	20,301	39,813	-0.8
New Motor Vehicle Sales (\$ million)	Mar.*	2,214	5,044	0.7
Refined Petroleum Products (thousand cubic metres)	Feb.	6,453	12,706	0.0
Retail Sales (\$ million)	Feb.	9,936	20,256	7.1

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

INFOMAT

A WEEKLY REVIEW

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