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# I•N•F•O•M•A•T

## A WEEKLY REVIEW



Friday, December 18, 1987

## OVERVIEW

- **Capacity Utilization Rates Hit Peak**
  A comparison of utilization rates posted since 1982 shows that the rate recorded in the third quarter of 1987 was a new peak for the period, but was only marginally greater than the previous high recorded in the fourth quarter of 1985.

- **Union Membership Shows Decline**
  The CALURA report shows the percentage of paid workers in Canada who were members of labour organizations declined for a second consecutive year in 1985.

- **Moderate Advance in New Housing Prices**
  In October, the new housing price index was up 0.4% over September, resuming the trend of modest advances noted from May to August.

- **Trusteed Pension Funds Still Growing Strongly**
  Assets of trusteed pension funds were estimated at $127.3 billion at the end of 1986, an increase of $17 billion, or 15.4% from a year earlier.

- **Help-wanted Index Continues to Rise**
  In November, the help-wanted index rose to 138, posting a record level for the seventh straight month. Data for November were collected nearly one month after the stock market reversal.

- **Fewer Older Workers in the Canadian Labour Market**
  In contrast to annual labour market improvements and despite the increased size of the 55-64 year age group, the number of older Canadians who were employed has actually declined slightly over the past decade.

- This issue **also** includes an article on the Merchandise Trade Balance.

## Capacity Utilization Rates Hit Peak

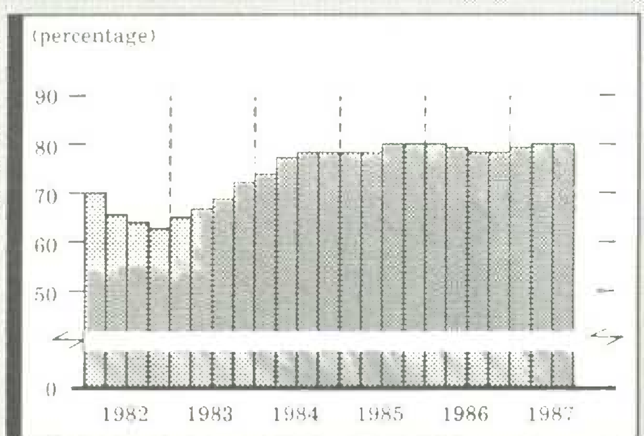
Capacity utilization in the manufacturing industries edged up to 80.5% in the third quarter of 1987 from 80.2% in the preceding quarter. A comparison of the utilization rates posted since the first quarter of 1982 shows that the rate recorded in this quarter was a new peak for the period, but only marginally greater than the previous high of 80.4% recorded in the fourth quarter of 1985.

Utilization rates in durable manufacturing industries increased by 1.6% in the third quarter of 1987 to 76.8%. This was the fourth consecutive quarter in which the capacity utilization rate for the durable manufacturing industries has increased. In the non-durable sector, capacity utilization rates dropped to 84.7% from 85.3% in the second quarter.

All of the major building materials producing industries showed strong increases in their rate of capacity utilization while posting new five-year peak levels of capacity utilization: wood industries increased by 8.3%; fabricated metal products industries rose 3.7%; and non-metallic mineral products industries were up 2.0%.

*(continued on page 2)*

### Capacity Utilization Rate



### ... Capacity Utilization Rates Hit Peak

Manufacturers of most types of equipment also showed increases. Furniture and fixture industries increased 1.6%, following a drop in production in the second quarter. Electrical and electronic products industries increased 0.7% to a new historical peak of 100.0%. (Utilization rates in these industries rose sharply in the second quarter.) Machinery industries registered a slight increase of 0.2%; at 58.2% this industry group has the lowest utilization rate among manufacturers of durable goods.

Most of the industries that produce fabricated materials for further processing and/or inclusion in end products recorded higher levels of capacity utilization.

Capacity utilization rates were down in two manufacturing industries that produce export goods of major importance to Canada. Transportation equipment industries reported a further decrease of 3.7%, continuing the downward trend which has been in evidence since the third quarter of 1985. The utilization rate for paper and allied products industries decreased (-1.2%) for the second consecutive quarter, but the rate was still close to a five-year high.

Manufacturers of miscellaneous end products, mainly consumer goods, showed mixed results: clothing industries increased 2.2%; printing, publishing and allied industries increased 0.6%; other manufacturing industries decreased 0.1%; beverage industries decreased 0.8%; and food industries decreased 2.2%.

**Capacity Utilization Rates**

| | 4Q'86 | 1Q'87 | 2Q'87 | 3Q'87 |
|---|---|---|---|---|
| | percentage | | | |
| Total manufacturing | 78.5 | 79.8 | 80.2 | 80.5 |
| Durable goods | 73.9 | 74.8 | 75.6 | 76.8 |
| Non-durable goods | 83.5 | 85.4 | 85.3 | 84.7 |

*For further information, contact Science, Technology and Capital Stock Division at (613) 951-9685.*

## Union Membership Shows Decline

In 1985, 34.4% of the 10.2 million paid workers in Canada were members of labour organizations, a decrease from 35.1% in 1984 and the peak level of 36% in 1983. The service industry accounted for 33.6% of total union membership. Manufacturing industries were the second largest group with 21.3%.

Highlights of the report *Corporations and Labour Unions Returns Act: Part II - Labour Unions*, 1985, include:

- Of the 3.5 million total union membership, 36.6% was in Ontario, 27.8% in Quebec and 12.9% in British Columbia.
- In 1985, women members comprised 36.2% of organized labour, compared to a representation of 16.6% in 1965.
- Women members as a percentage of all union members ranged from a high of 44.7% in Prince Edward Island to a low of 29.3% in Newfoundland. Their representation in the two largest provinces was 34.9% in Ontario and 37.4% in Quebec.
- In 1985, international unions represented 39.6% of total union membership, compared to 45% for national unions and 15.4% for government employee organizations. Over the past 20 years, the international union membership share has declined by 27.5 percentage points from its peak of 67.1%.
- There were 24,260 collective agreements reported in 1985; international unions held 53.5% of the agreements and Canadian-based unions held 46.5%.
- Total income from Canadian operations reported by all labour organizations in 1985 amounted to $654.6 million. International unions accounted for 20.8% of this total, national unions 57.3% and government employee organizations 21.9%. Over the past two decades, the proportion of Canadian members' dues paid to international unions has decreased from 68.8% to 20.1% in 1985.
- Excess of income over expenditures for all reporting labour organizations was $97.8 million, down 22% from 1984. The operating surplus was distributed as follows: international unions $56.5 million, national unions, $32 million and government employee organizations, $9.3 million.

*For further information, contact Industrial Organization and Finance at (613) 951-6904 or order Corporations and Labour Unions Returns Act: Report for 1985, Part II – Labour Unions (catalogue number 71-202).*

## Moderate Advance in New Housing Prices

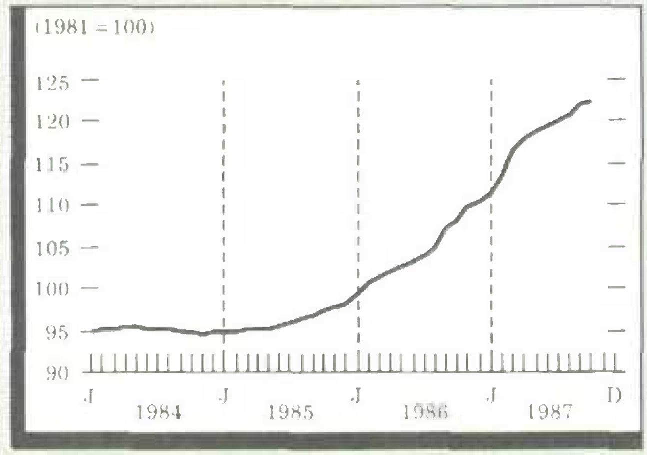
In October, the new housing price index advanced 0.4%, somewhat lower than the monthly increase recorded in the preceding month. (Rising prices for serviced land provided the main source of upward pressure on this index in September.) In the current month the land only portion of the index rose an estimated 0.5%, down sharply from the 2.7% advance recorded a month earlier. The house only portion advanced 0.3% in October. This index of housing contractors' selling prices was 13.2% higher than it was a year earlier. Generally, the rise in housing prices has been slower in recent months.

Although Toronto still records the largest year-over-year increase of any Canadian city, monthly increases have moderated considerably in the past six months. Generally, southwestern Ontario cities and Montreal maintained yearly gains well in excess of 10.0%. In Alberta and British Columbia, index levels were still below their 1981 price reference level of 100.

**Housing Price Index**

| | June | July | Aug. | Sept. | Oct. |
|---|---|---|---|---|---|
| | % change, previous month | | | | |
| New Housing | 0.5 | 0.4 | 0.6 | 1.0 | 0.4 |
| land only | 0.3 | 0.6 | 0.7 | 2.7 | 0.5 |
| house only | 0.6 | 0.3 | 0.5 | 0.3 | 0.3 |

**New Housing Price Index**




Among the cities surveyed, monthly increases were lower in October than in previous months with the notable exception of Calgary where prices advanced 2.0% over September.

*For further information, contact Prices Division at (613) 951-9601 or order Construction Price Statistics (catalogue number 62-007).*

## Trusteed Pension Funds Still Growing Strongly

The book value of assets of trusteed pension funds at December 31, 1986 was estimated at $127.3 billion, an increase of $17.0 billion, or 15.4%, from a year earlier. These assets represent approximately 55% of the reserves of all employer-sponsored pension plans, the remaining 45% being held by insurance companies or under the consolidated revenue arrangements used for certain public service plans.

Bonds and stocks continued to be the two most prominent investment vehicles, representing 47% and 27% respectively of the assets at book value. The remaining assets were distributed among investment vehicles such as: pooled, mutual, segregated and deposit administration funds, mortgages, real estate and various short-term securities.

The growth in the assets of trusteed pension funds has had an important impact on the amount of capital available for investment. During the period 1976-1986, this growth exceeded 400% in current dollars and equalled 140% when viewed in constant 1981 dollars (i.e. taking inflation into account).

These assets were held on behalf of approximately 3.3 million active pension plan members, plus an undetermined number of terminated or retired persons. This is equivalent to an average of $39,096 of invested reserves for each active member, compared with $16,957 in 1980 and $9,462 in 1976.

The number of active pension plan members has increased each year since 1970, to its present level. The growth rate, however, has dropped from an average of 5.9% per year in the 1970s to an average of 1.3% per year in the 1980s.

There were 3,833 trusteed pension funds in 1986. In the past two decades this number has fluctuated between a high of 4,072 in 1969 and a low of 3,245 in 1979. The fluctuation was seen almost exclusively in the number of funds with less than five members, a reflection of changing policies regarding pension plans for significant shareholders.

Income of trusteed pension funds was estimated at $22.4 billion in 1986, an increase of 14% from the previous year. Profit on the sale of securities, which accounted for 74% of the total growth in income in 1986

*(continued on page 4)*

### . . . Trusteed Pension Funds Still Growing Strongly

and 57% in 1985, reached a high of $5.0 billion. Employer contributions, which have been increasing at a slower rate since 1979, declined to $4.0 billion, a decrease of 10% from the previous year.

In the past 10 years, there has been a gradual reversal in the relative importance of the major sources of income. In 1976, contributions by both the employee and the employer represented 66.5% of the total income, while investment income and profit on the sale of securities amounted to 33.3%. By the end of 1986, these proportions had reversed to 30.4% and 68.8% respectively. This is primarily due to the generally upward movement in the financial markets during this period.

Expenditures in 1986 were estimated at $6.7 billion, up from $6.0 billion in 1985. Almost 80% of this amount was used to make pension payments and to purchase annuities while another 14.5% was withdrawn from the funds for reasons such as termination of employment, discontinuation of the pension plan or change of funding agency.

*For further information, contact Labour Division at (613) 951-4034 or order Trusteed Pension Funds: Financial Statistics (catalogue number 74-201).*

## Help-wanted Index Continues to Rise

In November, the seasonally adjusted Help-wanted Index for Canada (1981 = 100) continued to increase, rising to 138. The index has been posting record levels for seven months and appeared to be unaffected by the October reversal in the stock market.

The help-wanted index monitors the space devoted to help-wanted ads published in 18 metropolitan area newspapers. Since job advertising is one of the first stages in the hiring process, changes in the level of help-wanted ads can be used as a indicator of labour market conditions and employment trends. An increase in the help-wanted index frequently precedes a decline in the unemployment rate and decreases in the index usually coincide with rising unemployment rates.

An article in the October issue of *The Labour Force* examined the job search methods used by the unemployed between 1977 and 1986. Looking at job ads was used by almost half of the unemployed in 1986, an increase from 1977 when 40% reported using the help-wanted columns.

The help-wanted index is also closely tied to economic conditions. For example, the effect of the energy crisis in the mid-seventies was reflected by a decline in the index from 109 in the third quarter of 1974, to around 76 in 1977. The index also varied with the severe recesssion in the early eighties and the subsequent recovery. From 105 in the second quarter of 1981, the index dropped to 35 in the fourth quarter of 1982. A steady rise since then has brought the index to a level of 138 in November 1987.

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

| | July | Aug. | Sept. | Oct. | Nov. |
|---|---|---|---|---|---|
| | seasonally adjusted | | | | |
| **Canada** | **122** | **124** | **133** | **136** | **138** |
| Atlantic Region | 146 | 158 | 169 | 168 | 174 |
| Quebec | 138 | 131 | 146 | 147 | 153 |
| Ontario | 166 | 170 | 178 | 184 | 184 |
| Prairie Region | 50 | 53 | 60 | 55 | 59 |
| British Columbia | 49 | 53 | 49 | 54 | 57 |

The help-wanted index reflects regional variations in the demand for labour. Column space of published help-wanted ads is compared to the average space in the base year and then multiplied by the appropriate population weights for the metropolitan area or region of distribution.

- The index for the Atlantic provinces increased to 174 in November.
- An 6-point advance in the index for Quebec between October and November pushed its level to 153.
- The Ontario index was unchanged at 184, following four strong increases.
- The index for the Prairie provinces rebounded to 59 in November, close to its highest level in more than five years.
- The index for British Columbia rose to 57, resuming the upward trend it has been following since January 1987.

*For further information, contact Labour Division at (613) 951-4045.*

## Merchandise Trade Balance

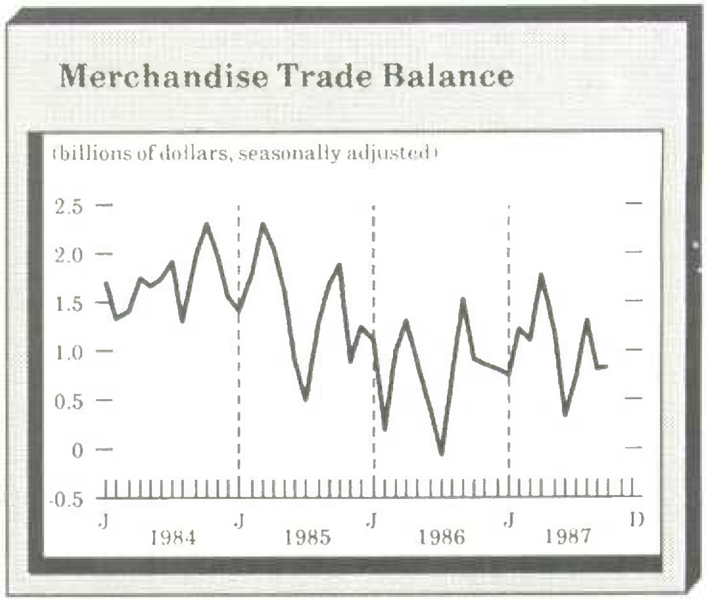
Adjusted on a balance of payments basis and corrected for seasonal fluctuations, the balance of international trade for the first ten months of 1987 was $10.1 billion. This represents a gain of $1.4 billion from the balance recorded in the same period of 1986. Exports have grown slightly faster (3.4%) than imports (2.2%) so far this year.

Exports rose for the third consecutive month and reached $10.7 billion in October, the highest level since January 1986. The 1.9% advance resulted primarily from a recovery in the crude materials sector; coal, copper ore, "other ores" and crude petroleum all recorded improvements. Rising commodity prices, particularly for copper and crude oil, have been noted through 1987. In fact, monthly exports of crude petroleum have been $400 million or higher since May. These were the highest levels recorded since January 1986. Exports of lumber, wood pulp and automobiles were down from the previous month.

Imports rose to $9.9 billion, a gain of 1.7% over September. The level of imports has registered some large fluctuations from the beginning of the second quarter, monthly changes range from -10.6% to 9.5%. However, year-to-date figures show a modest increase over the same period of 1986. In the current month, the value of motor vehicle parts and trucks showed the largest increases. Motor vehicle parts account for 14% of Canada's total imports so far in 1987, but at $13.2 billion the level is $1.4 billion lower than in 1986.

**Merchandise Trade**

| | June | July | Aug. | Sept. | Oct. |
|---|---|---|---|---|---|
| | % change, previous month | | | | |
| Imports | 9.5 | -5.5 | -2.8 | 6.4 | 1.7 |
| Exports | -0.1 | -1.6 | 3.2 | 0.8 | 1.9 |
| | change, previous month | | | | |
| Balance (millions $) | -873 | 387 | 590 | -503 | 33 |




Canada has had a surplus on the balance of trade with Japan since July. In October, the surplus with Japan increased and the deficit with "other countries" decreased. These movements contributed to the increase in the total trade surplus, but were partially offset by a decrease in the Canada-United States trade surplus.

*For further information, contact International Trade Division at (613) 951-9787 or order the Preliminary Statement of Canadian International Trade (catalogue number 65-001P).*

## Fewer Older Workers in Canada

From 1976 to 1986, the number of Canadians aged 55-64 years rose by 410,000, but their labour force strength increased by only 145,000 and the number employed actually declined slightly. This lack of employment growth runs counter to general labour market improvements after four consecutive years of economic recovery. Furthermore, in the past decade, many older workers remaining in the labour force have turned to part-time work and self-employment.

In the 1970s, the decline in labour force participation by older Canadians was restricted to older men; since then it has embraced older women as well. Among the contributing factors are the economic disruptions and job losses caused by the last recession: many older workers withdrew from the workforce at that time. Their colleagues who chose to look for other jobs experienced durations of unemployment well above the average for younger workers.

Still, only a handful of Canadians between the ages of 55-64 (and hardly any of those aged 65 or older) who are outside the labour force appear to want a job. This evidence suggests that the disappearance of a mandatory retirement age would, at least under current economic and demographic conditions, have little immediate impact on the participation rates of older Canadians. Future labour force participation trends will undoubtedly depend on many factors, among them the adequacy and security of retirement income, changing attitudes towards work and leisure, and the pace and nature of technological change.

These are the conclusions of a study on Older Workers in The Canadian Labour Market which was published in the November issue of *The Labour Force*.

*For further information, contact Household Surveys Division at (613) 951-4624 or order the November issue of The Labour Force.*

# PUBLICATIONS RELEASED FROM DECEMBER 11 – 17

## AGRICULTURE

**Census of Agriculture – Canada,** 1986. Catalogue number 96-102 (Canada: $50; Other Countries: $51.50).

**Production and Stocks of Eggs and Poultry,** September 1987. Catalogue number 23-003 (Canada: $10/$100; Other Countries: $11/$110).

## CENSUS

**Profiles – Census Divisions and Subdivisions – Prince Edward Island: Part 1,** 1986 Census. Catalogue number 94-103 (Canada: $26; Other Countries: $27).

## EDUCATION, CULTURE AND TOURISM

**Culture Statistics – Periodical Publishing,** 1985. Catalogue number 87-203 (Canada: $10; Other Countries: $11).

**International Travel – Advance Information,** October 1987. Catalogue number 66-001P (Canada: $5/$50; Other Countries: $6/$60).

**Travel-log,** Vol. 6, No. 3. Catalogue number 87-003 (Canada: $9/$36; Other Countries: $10/$40).

## INDUSTRY

**Asphalt Roofing,** October 1987. Catalogue number 45-001 (Canada: $4/$40; Other Countries: $5/$50).

**Cement,** October 1987. Catalogue number 44-001 (Canada: $4/$40; Other Countries: $5/$50).

**Crude Petroleum and Natural Gas Production,** August 1987. Catalogue number 26-006 (Canada: $8/$80; Other Countries: $9/$90).

**Fruit and Vegetable Preservation Service Bulletin,** Vol. 15, No. 23, **Pack of Apples and Apple Products,** 1986. Catalogue number 32-023 (Canada: $6/$100; Other Countries: $7/$110).

**Gypsum Products,** October 1987. Catalogue number 44-003 (Canada: $4/$40; Other Countries: $5/$50).

**Inventories, Shipments and Orders in Manufacturing Industries,** August 1987. Catalogue number 31-001 (Canada: $15/$150; Other Countries: $16/$160).

**Production, Shipments and Stocks on Hand of Sawmills East of the Rockies,** September 1987. Catalogue number 35-002 (Canada: $8/$80; Other Countries: $9/$90).

**Rigid Insulating Board,** October 1987. Catalogue number 36-002 (Canada: $4/$40; Other Countries: $5/$50).

**Wholesale Trade,** September 1987. Catalogue number 63-008 (Canada: $5/$50; Other Countries: $6/$60).

## INTERNATIONAL TRADE

**Imports by Country,** January-September 1987. **Catalogue number 65-006** (Canada: $75/$300; Other Countries: $85/$340).

## LABOUR

**The Labour Force,** November 1987. Catalogue number 71-001 (Canada: $20/$200; Other Countries: $21.50/$215).

**Unemployment Insurance Statistics,** July 1987. Catalogue number 73-001 (Canada: $12/$120; Other Countries: $13/$130).

**Unemployment Insurance Statistics,** August 1987. Catalogue number 73-001 (Canada: $12/$120; Other Countries: $13/$130).

## PRICES

**Consumer Price Index,** November 1987. Catalogue number 62-001 (Canada: $8/$80; Other Countries: $9/$90).

## PUBLIC INSTITUTIONS

**The Control and Sale of Alcoholic Beverages in Canada,** 1985. Catalogue number 63-202 (Canada: $12; Other Countries: $13).

**Federal Government Employment,** April-June 1987. Catalogue number 72-004 (Canada: $20/$80; Other Countries: $21/$84).

## SCIENCE, TECHNOLOGY AND CAPITAL STOCK

**Building Permits,** August 1987. Catalogue number 64-001 (Canada: $20/$200; Other Countries: $21/$210).

## TRANSPORTATION

**Aviation Statistics Centre Service Bulletin,** Vol. 19, No. 12. Catalogue number 51-004 (Canada: $8.50/$85; Other Countries: $9.50/$95).

# Regional Reference Centres

Statistics Canada's regional reference centres provide a full range of the bureau's products and services. Each reference centre is equipped with a library and a sales counter where users can consult or purchase our publications, microcomputer diskettes, microfiche, maps and more.

Each centre has facilities to retrieve information from Statistics Canada's computerized data retrieval systems CANSIM and Telichart. A telephone inquiry service is also available with toll free numbers for regional clients outside local calling areas. Many other valuable services – from seminars to consultations – are offered. Call or write your regional reference centre for information.

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Toll free service: 1-800-563-4255

**Ontario**
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10th Floor
Arthur Meighen Building
25 St. Clair Avenue East
Toronto, Ontario
M4T 1M4

Local calls: 973-6586
Toll free service: 1-800-268-1151

**Manitoba**
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Statistics Canada
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266 Graham Avenue
Winnipeg, Manitoba
R3C 0K4

Local calls: 983-4020
Toll free service: 1-800-542-3404

**Maritime Provinces**
Advisory Services
Statistics Canada
North American Life Centre
1770 Market Street
Halifax, Nova Scotia
B3J 3M3

Local calls: 426-5331
Toll free service: 1-800-565-7192

**Nipissing Region**
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Statistics Canada
Civic Administration Centre
225 Holditch Street
Sturgeon Falls, Ontario
P0H 2G0

Local calls: 753-4888
If outside the local calling area, please dial the toll free number given for Ontario residents.

**Saskatchewan**
Advisory Services
Statistics Canada
530 Midtown Centre
Regina, Saskatchewan
S4P 2B6

Local calls: 780-5405
Toll free service: 1-800-667-7164

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Advisory Services
Statistics Canada
3rd Floor
Federal Building, Sinclair Centre
757 West Hastings Street
Suite 440F
Vancouver, B.C. V6C 3C9

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suite 412 East Tower
Montreal, Quebec
H2Z 1X4

Local calls: 283-5725
Toll free service: 1-800-361-2831

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Local calls: 951-8116
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Local calls: 420-3027
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## LATEST MONTHLY STATISTICS

| | | | Previous Month | % Change From Year Ago |
|---|---|---|---|---|
| **EMPLOYMENT, INCOME** | | | | |
| Average Weekly Earnings ($) | Aug. | 439.13 | 442.17 | 2.7 |
| Labour Income ($ million) | Sept. | 24,825 | 24,497 | 7.0 |
| Persons with Jobs (million) | Nov. | 12.05 | 12.16 | 3.8 |
| Unemployed (million) | Nov. | 1.0 | 1.0 | -12.7 |
| **INVENTORIES** | | | | |
| Department Store ($ million) | Sept. | 4,764 | 4,445 | 5.5 |
| Manufacturers' Owned ($ million) | Sept. | 33,887 | 33,804 | 1.9 |
| **ORDERS** | | | | |
| Manufacturers' New Orders ($ million) | Sept. | 23,329 | 21,090 | 9.6 |
| Manufacturers' Unfilled Orders ($ million) | Sept. | 23,212 | 20,871 | 8.5 |
| **PRICES** | | | | |
| Consumer Price Index (1981=100) | Oct. | 139.8 | 139.3 | 4.3 |
| New House Price Index (1981=100) | Oct.* | 122.5 | 122.0 | 13.2 |
| Raw Materials Price Index (1981=100) | Oct. | 104.4 | 106.0 | 11.3 |
| Excl. minerals fuels | Oct. | 111.8 | 111.6 | 6.8 |
| Industrial Product Price Index (1981=100) | Oct. | 124.3 | 124.0 | 3.7 |
| **CONSTRUCTION** | | | Year-to-date | |
| Building Permits ($ million) | Aug. | 2,040 | **19,949** | **25.0** |
| Housing Starts – Urban Centres (units) | Sept. | 17,875 | **166,353** | **32.8** |
| **ENERGY** | | | | |
| Coal Production (thousand tonnes) | Sept. | 5,479 | **43,673** | **5.9** |
| Electricity Generation (gigawatt hours) | Sept. | 34,846 | **355,129** | **6.7** |
| Natural Gas Production (million cubic metres) | Aug. | 8,593 | **71,242** | **4.3** |
| **FOREIGN TRADE** | | | | |
| Exports – Balance of Payments Basis ($ million) | Oct.* | 11,261 | **103,592** | **3.5** |
| Imports – Balance of Payments Basis ($ million) | Oct.* | 10,073 | **94,315** | **2.0** |
| **SALES** | | | | |
| Department Store Sales ($ million) | Sept. | 1,029 | **8,412** | **1.0** |
| Manufacturers' Shipments ($ million) | Sept. | 23,212 | **192,915** | **3.1** |
| New Motor Vehicle Sales ($ million) | Oct. | 2,222 | **20,344** | **9.2** |
| Refined Petroleum Products (thousand cubic metres) | Sept. | 7,124 | **59,516** | **3.7** |
| Retail Sales ($ million) | Sept. | 11,540 | **12,778** | **9.0** |

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

# I•N•F•O•M•A•T

## A Weekly Review

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