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Friday, April 15, 1988

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OVERVIEW

■ Deficit Recorded in Automotive Trade Balance

In 1987, Canada's trade in automotive products resulted in a deficit for the first time in six years. The deterioration of the surplus with our largest trading partner, the United States, was almost entirely the result of lower exports of automobiles.

■ Motor Vehicle Sales Continue to Fluctuate in February

Despite month-over-month declines in three of the last six months, the overall level of new motor vehicles sales was essentially unchanged.

■ The Value of Building Permits Jumps 14.5%

In January, a sharp improvement in the value of building permits issued by municipalities reflected higher construction intentions in both the residential and non-residential sectors.

■ Growth Rate of Housing Prices Accelerates

The new housing price index rose 1.1% in February, a contrast to the moderate growth noted from October to January.

■ Labour Income Registers 6.8% Increase

The year-over-year increase in labour income in January of 6.8% was in line with the 1987 annual growth rate of 6.7%.

■ Labour Market Shows Little Change

The labour force survey results for March indicate employment gains for the month were marginal and that the unemployment rate remained at 7.8%.

This issue also includes information on the Help-wanted Index and Canadian Social Trends.

Deficit Recorded in Automotive Trade Balance

In 1987, Canada's trade in automotive products (motor vehicles, parts, tires and tubes) resulted in a deficit (\$1.5 billion) for the first time in six years. The balance of trade with the United States continued to register a surplus, albeit at a lower level, while the traditional deficit with all other countries rose to \$5.4 billion. From 1982 to 1986, Canada registered a surplus in automotive trade, but the size of the surplus dropped each year after 1984. The deficit in 1987 was the result of a \$2.0 billion decrease in exports. Imports were basically unchanged as they declined by less than 1%.

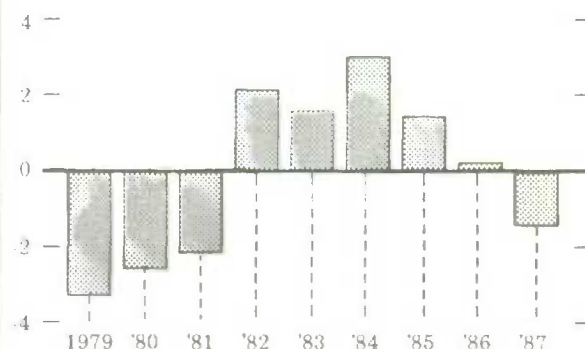
The overall deficit in 1987 was mainly the result of a decrease in Canada's surplus in trade in cars. The surplus in trade with our largest trading partner, the United States, was \$3.9 billion or \$1.4 billion less than it was in 1986. The surplus in passenger autos alone fell by \$3.0 billion. However, the deficit on motor vehicle parts was \$1.1 billion lower.

Exports (including re-exports) of all automotive products dropped \$2.0 billion below the level of 1986. This decrease was almost entirely attributable to the

(continued on page 2)

Automotive Trade Balance

(billions of dollars)



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Canada

... Deficit Recorded in Automotive Trade Balance

decline in car exports, which totalled \$13.6 billion, compared to \$16.5 billion in 1986. At \$12.8 billion, exports of parts, tires and tubes were down slightly. The value of truck exports was \$7 billion, an improvement of \$1.0 billion over the previous year. Total exports were \$33.4 billion, the lowest level since 1984.

Imports were also down, but compared to the decrease in exports the decline was insignificant. Overall, imports fell by only \$282 million and totalled \$34.9 billion. Imports of parts fell to \$18.8 billion, a drop of \$928 million. This decrease was almost entirely offset by higher imports of cars and trucks.

Canada imported 1.0 million passenger autos in 1987, a decrease of 6.6% from the previous year. Based on units, the Japanese share of the Canadian import market was 26.1%, an increase from the 22.4% share held in 1986. The Japanese share grew at the expense of

Balance of Trade – Automotive Products

	1983	1984	1985	1986	1987
	billions of dollars				
Exports					
Cars	9.1	13.3	15.3	16.5	13.6
Other vehicles	4.6	6.0	6.6	6.0	7.0
Parts, tires, tubes and re-exports	7.9	11.4	12.6	12.9	12.8
Imports					
Cars	6.2	7.9	10.8	12.1	12.3
Other vehicles	1.4	2.4	2.9	3.3	3.7
Parts, tires, tubes and re-exports	12.4	17.3	19.4	19.7	18.8

North American models whose market share dropped to 63.3% from 64.0%, and the West German models whose share slid to 2.7% from 4.6% in 1986.

For further information, contact International Trade Division at (613) 951-1711.

Motor Vehicle Sales Continue to Fluctuate

Following a modest advance in January, seasonally adjusted unit sales of new motor vehicles were down by 3.2% in February. Despite month-over-month declines in three of the last six months, the overall level of sales has been maintained. The drop in February stemmed from lower sales of passenger cars and commercial vehicles.

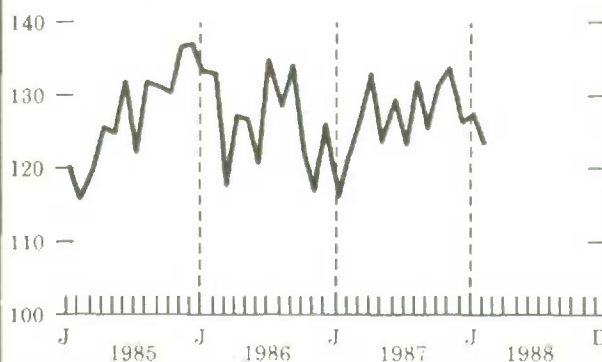
Passenger car sales in February were down 2.8% from the previous month, continuing the trend of fluctuating sales noted in recent months. Sales of North American-built cars were off 2.2%, the third consecutive monthly decline. Imported car sales were down 4.1% in February. Wide fluctuations in month-to-month sales of imported cars are not unusual, but the level of sales appears to have been following a gentle downward trend for the last six months.

Motor Vehicle Sales

	Oct.	Nov.	Dec.	Jan.	Feb.
	% change, previous month				
Passenger cars	2.3	1.7	-4.9	1.0	-2.8
North American	6.4	1.5	-3.5	-1.2	-2.2
Imported	-4.8	2.2	-7.8	5.3	-4.1
Commercial vehicles	10.4	1.0	-6.6	0.9	-3.9

New Motor Vehicle Sales

(thousands of units, seasonally adjusted)



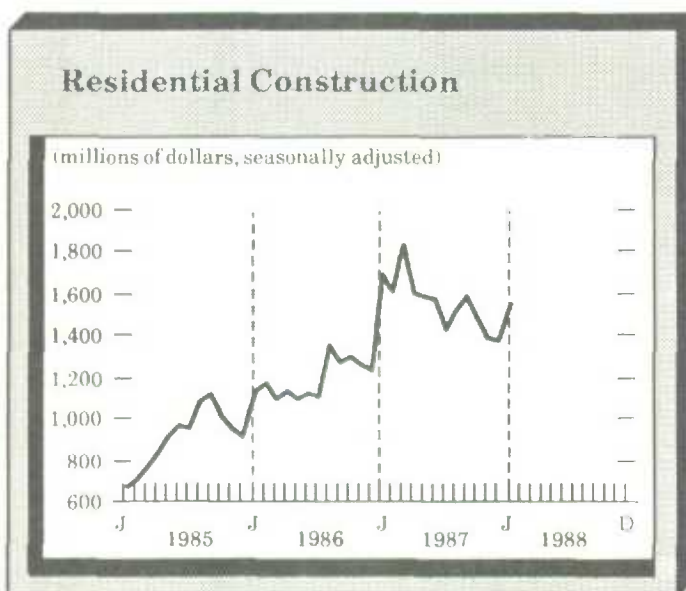
Commercial vehicle sales dropped 3.9% in February, the second decline in three months. The most recent peak in commercial vehicle sales occurred in November when 42,277 units were sold.

For the first two months of 1988, actual sales of new motor vehicles rose 4.0% over the same period last year. Sales of imported passenger cars were up 3.4%, while domestic car sales gained 1.1%. Commercial vehicle sales continued to show strength with the year-to-date total 8.7% higher than in 1987.

For further information, contact Industry Division at (613) 951-3549 or order New Motor Vehicle Sales (catalogue number 63-007).

The Value of Building Permits Jumps 14.5%

- In January, the seasonally adjusted value of building permits issued by Canadian municipalities was \$2.8 billion, up 14.5% from December. The value of building permits, which is an indicator of anticipated levels of investment in construction, had been following a downward trend since April 1987.
- This was the third year in a row that a significant advance in the level of building permits has occurred in January.
- In January, the value of residential building permits jumped 12.6% to \$1.6 billion.



Building Permits

	Sept.	Oct.	Nov.	Dec.	Jan.
	% change, previous month				
Total	6.7	-4.7	-1.0	-1.2	14.5
Residential	4.1	-6.0	-6.5	-0.3	12.6
Non-residential	11.0	-2.5	7.4	-2.3	17.2

- The slowing in residential construction activity in the three preceding months was primarily the result of decreases in permits issued for multi-family dwellings. This trend was interrupted in January as permits issued for multi-family dwelling units totalled \$631 million, up 47% over December.
- Permits issued for single-family dwellings dropped slightly (-3.0%) during the month.
- The advance in residential construction originated primarily in Quebec. Except for the Atlantic region, all other areas registered slight decreases.
- Quebec was also the main source of the advance in non-residential construction permits. British Columbia and Ontario also contributed to the upswing.
- Overall, the value of non-residential building permits rose 17.2% to \$1.0 billion in January.
- Gains were recorded in both the government and commercial components, while the industrial component dropped sharply.

For further information, contact Science, Technology and Capital Stock Division at (613) 951-2583 or order Building Permits (catalogue number 64-001).

Help Wanted Index Declines

The seasonally adjusted help-wanted index (1981 = 100) decreased by 2.1% in March from a record level of 146 in February.

The help-wanted index monitors the space devoted to help-wanted ads published in 18 major metropolitan newspapers and serves as an indicator of the demand for labour.

The decrease in the current month was a result of declines in Quebec and Ontario from the all-time highs recorded in February. The index increased in the Atlantic provinces, while there was little change in the Prairie region and British Columbia.

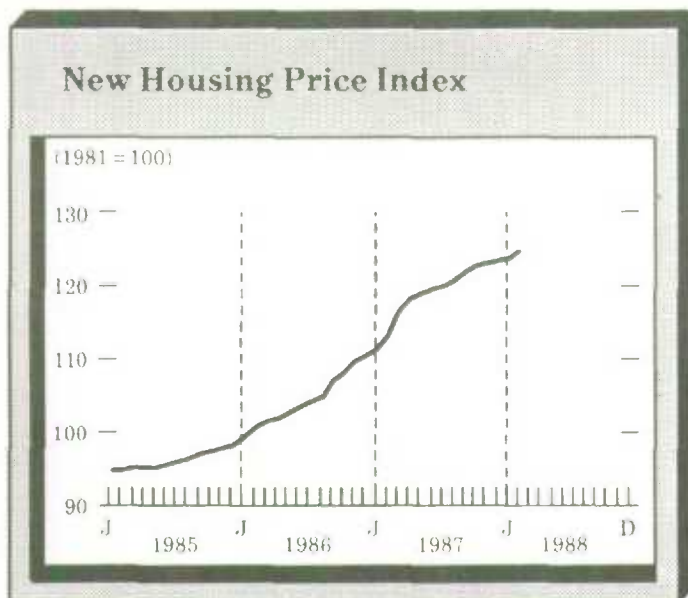
Help-wanted Index (1981 = 100)

	Nov.	Dec.	Jan.	Feb.	Mar.
	seasonally adjusted				
Canada	139	140	138	146	143
Atlantic Region	173	164	181	154	172
Quebec	154	150	144	163	160
Ontario	184	189	190	197	194
Prairie Region	59	58	62	58	60
British Columbia	57	55	58	58	56

For further information, contact Labour Division at (613) 951-4045 or order Help-wanted Index (catalogue 71-204).

Growth Rate of Housing Prices Accelerates

The new housing price index, which measures changes in prices for particular models of new residential houses, rose 1.1% in February, a contrast to the moderate growth noted from October to January. The house only



Housing Price Indexes

	Oct.	Nov.	Dec.	Jan.	Feb.
	% change, previous month				
New Housing	0.4	0.3	0.2	0.3	1.1
land only	0.5	0.5	0.4	0.7	1.2
house only	0.3	0.2	0.2	0.2	1.0

index increased 1.0%, the largest monthly increase in 10 months. Generally, price increases were attributable to higher construction costs, which were passed on to buyers, as builders began setting their prices for the spring.

Among the cities surveyed, Windsor showed the largest monthly increase (4.0%), followed by Toronto with an increase of 1.6%. Elsewhere in southwestern Ontario, most price increases ranged between 0.5% and 1.6%. Prices in Calgary, which have been following a rising trend since March 1987, finally surpassing their 1981 reference level.

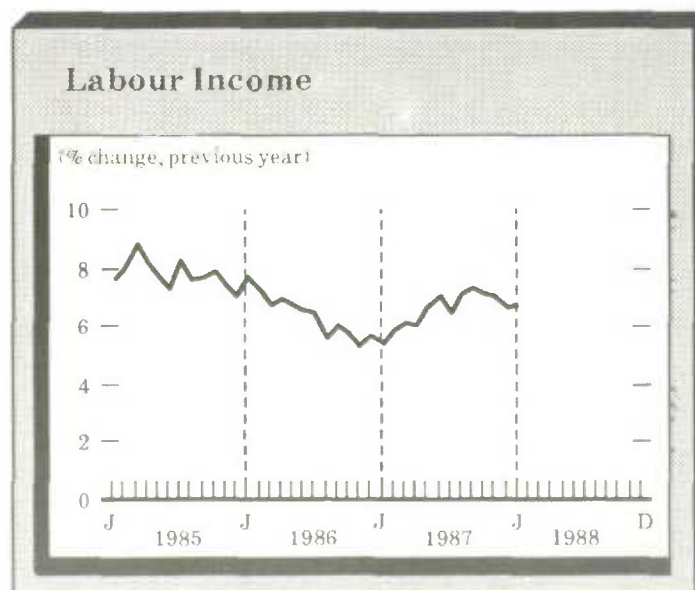
For further information, contact Prices Division at (613) 951-9601 or order Construction Price Statistics (catalogue number 62-007).

Labour Income Registers 6.8% Increase

The preliminary estimate of labour income for January was \$24.2 billion, an increase of 6.8% from January 1987. The January 1988 increase was similar to the annual change in 1987 of 6.7%. Labour income is the largest component of gross domestic product, accounting for slightly over 50%.

The seasonally adjusted estimate of wages and salaries for January increased by 0.8% from December. Nova Scotia and Saskatchewan led all provinces with growth rates of slightly over 1.0%. Central Canada contributed approximately 80% of the overall dollar increase as both Quebec and Ontario posted healthy gains.

The service-producing industries led the growth in total wages and salaries for January. The finance, insurance and real estate industry reported an increase of 1.2%. Wholesale and retail combined, grew by 1.1%, following two months of modest growth. Among the goods-producing industries, mining advanced 1.3%, recording above-average growth for the second consecutive month.



For further information, contact Labour Division at (613) 951-4051 or order Estimates of Labour Income (catalogue 72-005).

Labour Market Shows Little Change

Seasonally adjusted estimates from the Labour Force Survey indicate little change in the labour market for March 1988. Employment gains were marginal, while the unemployment rate remained unchanged at 7.8%.

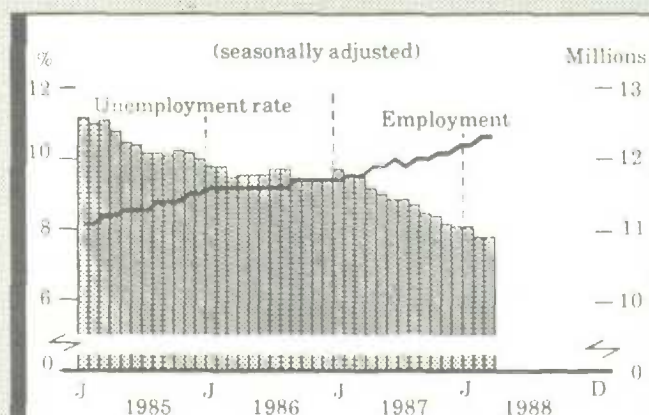
The 15,000 new jobs created in March were down from an average monthly increase of 40,000 for 1987. Full-time employment declined slightly (-16,000), the first decrease since September 1986. This decline was more than offset by increases in part-time employment where gains were recorded for both men and women. Over the last few months, part-time employment has strengthened after relatively weak growth in 1987.

Employment advances in March were concentrated in the manufacturing and finance, insurance and real estate industries. The construction and personal and business service industries posted declines. Employment growth in the service-producing industries has generally outpaced the goods-producing industries over the past few months. Both aggregates recorded small advances in March.

Ontario and Alberta dominated employment growth in March as was the case in February. Declines were recorded in New Brunswick and Saskatchewan, with little or no change in the other provinces.

The seasonally adjusted estimate of unemployment declined by 10,000 in March to 1,036,000. The unemployment rate remained unchanged from

Unemployment Rate and Employment

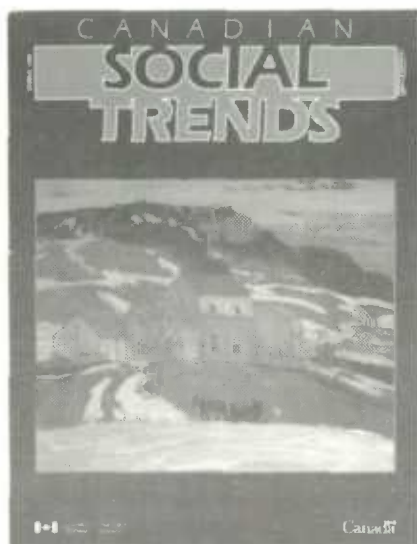


February at 7.8%. The 20-24 age group was the only group to report an increase in the number of persons unemployed in March. This increase followed a sizeable decrease in February. The number of unemployed fell in Ontario and British Columbia, while increases were recorded in New Brunswick and Quebec. There was little or no change in the other provinces.

For further information, contact Household Surveys Division at (613) 951-4720 or order *The Labour Force* (catalogue number 71-001).

NEW FROM STATISTICS CANADA

Canadian Social Trends, Spring 1988



According to the Spring 1988 edition of *Canadian Social Trends*, results from the 1986 Census show continuing shifts in the marital status of Canadians since the last count in 1981. The fast-growing divorced population increased 38% from 500,000 in 1981 to 690,000. Increases in the separated and widowed populations were smaller: the number in the separated category rose 10% from 470,000 to 518,000, and the number of widows and widowers rose by 8%, from 1.16 million to 1.25 million. The slowest-growing marital category was the single (never married) group, whose numbers rose just 3.2% from 5.3 million to 5.4 million. The increase in the number of married people was not much greater: a 4.8% rise from 11.5 million to 12.0 million.

This edition also features articles on therapeutic abortion in Canada, job displacement, unionization, wife abuse, the help-wanted index, and passenger traffic on commercial air services.

Copies of *Canadian Social Trends* (11-008E, \$8/\$32) are now available from Publication Sales (613) 951-7276. Due to overwhelming support for this publication, a reduced price is now being offered to readers.

PUBLICATIONS RELEASED FROM APRIL 8 - 14

AGRICULTURE

Production and Stocks of Eggs and Poultry, January 1988. Catalogue number 23-003 (Canada: \$11/\$110; Other Countries: \$12/\$120).

CENSUS

Profiles - Census Tracts - Guelph: Part 1, 1986. Catalogue number 95-109 (Canada: \$19; Other Countries: \$20).

Profiles - Census Tracts - Hamilton: Part 1, 1986. Catalogue number 95-113 (Canada: \$26; Other Countries: \$27).

Profiles - Census Tracts - Kamloops: Part 1, 1986. Catalogue number 95-115 (Canada: \$19; Other Countries: \$20).

Profiles - Census Tracts - Peterborough: Part 1, 1986. Catalogue number 95-137 (Canada: \$20; Other Countries: \$21).

Profiles - Census Tracts - Lethbridge: Part 1, 1986. Catalogue number 95-123 (Canada: \$20; Other Countries: \$21).

Profiles - Census Tracts - Oshawa: Part 1, 1986. Catalogue number 95-133 (Canada: \$20; Other Countries: \$21).

Profiles - Census Tracts - Prince George: Part 1, 1986. Catalogue number 95-139 (Canada: \$20; Other Countries: \$21).

Profiles - Census Tracts - Sault Ste. Marie: Part 1, 1986. Catalogue number 95-155 (Canada: \$20; Other Countries: \$21).

Profiles - Census Tracts - Sudbury: Part 1, 1986. Catalogue number 95-159 (Canada: \$20; Other Countries: \$21).

Profiles - Census Tracts - Sarnia: Part 1, 1986. Catalogue number 95-151 (Canada: \$20; Other Countries: \$21).

Profiles - Census Tracts - St. Catharines - Niagara: Part 1, 1986. Catalogue number 95-147 (Canada: \$23; Other Countries: \$24).

Profiles - Census Tracts - Thunder Bay: Part 1, 1986. Catalogue number 95-161 (Canada: \$20; Other Countries: \$21).

Profiles - Census Tracts - Windsor: Part 1, 1986. Catalogue number 95-171 (Canada: \$21; Other Countries: \$22).

DEMOGRAPHY

Quarterly Demographic Statistics, July-September 1987. Catalogue number 91-002 (Canada: \$7/\$28; Other Countries: \$8/\$32).

EDUCATION, CULTURE AND TOURISM

Education Statistics Bulletin, Vol. 10, No. 1, **Continuing Education in Canadian Universities**, 1985-86. Catalogue number 81-002 (Canada: \$4.50/\$45; Other Countries: \$5.50/\$55).

GENERAL

Canadian Social Trends, Spring 1988. Catalogue number 11-008E (Canada: \$8/\$32; Other Countries: \$9/\$36).

INDUSTRY

Electric Lamps, January 1988. Catalogue number 43-009 (Canada: \$4.50/\$45; Other Countries: \$5.50/\$55).

Electric Lamps, February 1988. Catalogue number 43-009 (Canada: \$4.50/\$45; Other Countries: \$5.50/\$55).

Electric Power Statistics, December 1987. Catalogue number 57-001 (Canada: \$9/\$90; Other Countries: \$10/\$100).

Fruit and Vegetable Preservation Service Bulletin, Vol. 16, No. 8, **Pack of Processed Beans, Green and Wax**, 1987. Catalogue number 32-023 (Canada: \$7/\$115; Other Countries: \$8/\$125).

Oil Pipe Line Transport, December 1987. Catalogue number 55-001 (Canada: \$9/\$90; Other Countries: \$10/\$100).

Primary Iron and Steel, December 1987. Catalogue number 41-001 (Canada: \$4.50/\$45; Other Countries: \$5.50/\$55).

Production, Shipments and Stocks on Hand of Sawmills East of the Rockies, December 1987. Catalogue number 35-002 (Canada: \$9/\$90; Other Countries: \$10/\$100).

LABOUR

Labour Force Information, March 1988. Catalogue Number 71-001P. (Canada: \$5.50/\$55; Other Countries: \$6.50/\$65).

PRICES

Industry Price Indexes, January 1988. Catalogue number 62-011 (Canada: \$16.50/\$165; Other Countries: \$18.50/\$185).

SCIENCE, TECHNOLOGY AND CAPITAL STOCK

Science and Technology Indicators, 1987. Catalogue number 88-201 (Canada: \$44; Other Countries: \$46).

TRANSPORT

Railway Operating Statistics, November 1987. Catalogue number 52-003 (Canada: \$9.50/\$95; Other Countries: \$10.50/\$105).

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LATEST MONTHLY STATISTICS

			Previous Month	% Change From Year Ago
EMPLOYMENT, INCOME				
Average Weekly Earnings (\$)	Jan.	453.76	451.46	4.2
Labour Income (\$ million)	Jan.*	24,221	24,433	6.8
Persons with Jobs (million)	Mar.*	12.00	11.94	4.3
Unemployed (thousand)	Mar.*	1,181	1,126	-15.5
INVENTORIES				
Department Store (\$ million)	Jan.	3,749	4,031	-0.2
Manufacturers' Owned (\$ million)	Jan.	34,845	34,252	4.4
ORDERS				
Manufacturers' New Orders (\$ million)	Jan.	21,620	21,706	10.1
Manufacturers' Unfilled Orders (\$ million)	Jan.	24,687	24,348	4.7
PRICES				
Consumer Price Index (1981 = 100)	Feb.	141.3	140.8	4.0
New House Price Index (1981 = 100)	Feb.*	124.9	123.6	10.3
Raw Materials Price Index (1981 = 100)	Feb.	98.9	101.7	0.5
Excl. minerals fuels	Feb.	112.1	114.1	7.2
Industrial Product Price Index (1981 = 100)	Feb.	125.5	126.3	4.3
CONSTRUCTION				
Building Permits (\$ million)	Dec.*	2,409	30,437	23.3
Housing Starts - Urban Centres (units)	Jan.	11,687	11,687	-18.3
ENERGY				
Coal Production (thousand tonnes)	Jan.	6,192	6,192	27.0
Electricity Generation (gigawatt hours)	Jan.	48,949	48,949	4.2
Natural Gas Production (million cubic metres)	Dec.	12,083	113,087	6.9
FOREIGN TRADE				
Exports - Balance of Payments Basis (\$ million)	Jan.	10,005	10,005	9.2
Imports - Balance of Payments Basis (\$ million)	Jan.	11,899	11,899	35.3
SALES				
Department Store Sales (\$ million)	Jan.	730	730	-0.5
Manufacturers' Shipments (\$ million)	Jan.	21,279	21,279	8.7
New Motor Vehicle Sales (\$ million)	Feb.*	1,730	3,223	13.9
Refined Petroleum Products (thousand cubic metres)	Feb.	6,638	13,217	6.2
Retail Sales (\$ million)	Jan.	11,313	11,313	9.6

Statistics are in current dollars and are not seasonally adjusted.

* new this week.

I.N.F.O.M.A.T

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