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I·N·F·O·M·A·T

A WEEKLY REVIEW

Friday, May 31, 1991

OVERVIEW

Building Permits Resume Decline

The value of building permits fell 4.6% in March to a level of $1.8 billion. The decline was entirely due to the non-residential construction sector.

Strong Growth in Average Weekly Earnings

In March, average weekly earnings were 5.9% higher than a year earlier. With the exception of February 1991, this is the highest year-over-year growth rate since August 1990.

Falling Crude Oil Prices Continue to Push Down RMPI

In April, the Raw Materials Price Index registered its fifth consecutive monthly decline. The 1.4% decrease was mainly due to a fall in crude oil prices.

Industrial Product Price Index: Third Straight Drop

The IPPI fell 0.3% in April, the third straight drop. Declines in the prices of paper and paper products and of petroleum and coal products were largely responsible for the decrease.

Regular UI Beneficiaries Continue to Rise Sharply

In March, the number of persons receiving regular unemployment insurance benefits rose for the seventh consecutive month. Increases were registered in all provinces and territories.

Farm Cash Receipts Continue to Decline

Farm cash receipts for the first quarter of 1991 were down 4% from the first quarter of the previous year to $5.6 billion. Declines in crop receipts and direct program payments were not offset by higher livestock receipts.

Department Store Sales Edge Up

Sales of department stores including concessions increased slightly (0.1%) in March, following a jump of 9.7% in February.

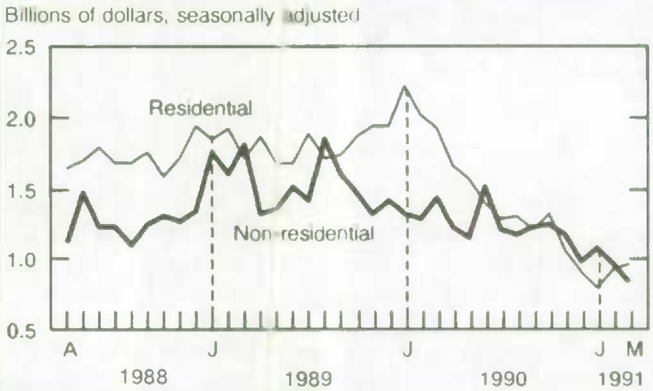
Building Permits Resume Decline

Following a slight decline of 0.1% in February, the value of building permits fell 4.6% to $1.8 billion in March. The non-residential construction sector was entirely responsible for this drop.

Non-residential building permits decreased by 12.8% in March to $823 million, the second consecutive drop following a 9.3% gain in January. Non-residential permits have been generally declining since August 1989. Commercial permits fell 9.9% to $472 million following a drop nearly twice as large in February. After rising for seven months, institutional permits fell to $245 million, a 23.7% drop from February's peak. The industrial sector reported a gain of 7.3%, the first increase following five straight monthly declines.

(continued on page 2)

Building Permits



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... Building Permits Resume Decline

The value of residential building permits rose 3.9% in March to $952 million following a 13.4% gain in February. The single-family dwelling sector was up 9.0% to a level of $621 million, while multi-family dwellings decreased 4.6% to $331 million.

For further information, order Building Permits (catalogue number 64-001) or contact Investment and Capital Stock Division at (613) 951-2585.

PROVINCIAL PERSPECTIVES

Building Permits, March 1991 (Unadjusted Data)

Province/Territory	Total		Residential		Non-residential	
	($ millions)	% change from March 1990	($ millions)	% change from March 1990	($ millions)	% change from March 1990
Canada	**1,839.4**	**-47.2**	**1,113.9**	**-48.6**	**725.5**	**-44.9**
Newfoundland	7.9	-56.3	5.2	-23.1	2.7	-76.4
Prince Edward Island	5.1	-60.3	3.2	-58.2	1.9	-63.4
Nova Scotia	40.4	-52.8	23.4	-47.9	16.9	-56.1
New Brunswick	9.8	-77.4	6.0	-73.2	3.7	-82.0
Quebec	524.0	-40.3	350.8	-32.2	173.1	-52.0
Ontario	625.1	-55.1	378.0	-55.3	247.1	-54.7
Manitoba	55.1	-24.8	21.0	-38.5	34.2	-12.8
Saskatchewan	17.8	-13.4	4.9	-50.2	13.0	19.7
Alberta	206.3	-47.2	99.6	-59.7	106.6	-25.8
British Columbia	339.7	-40.6	220.4	-47.7	119.2	-21.1
Yukon	4.3	182.6	0.7	-40.6	3.6	1,141.9
Northwest Territories	3.9	360.8	0.5	-20.2	3.5	1,259.4

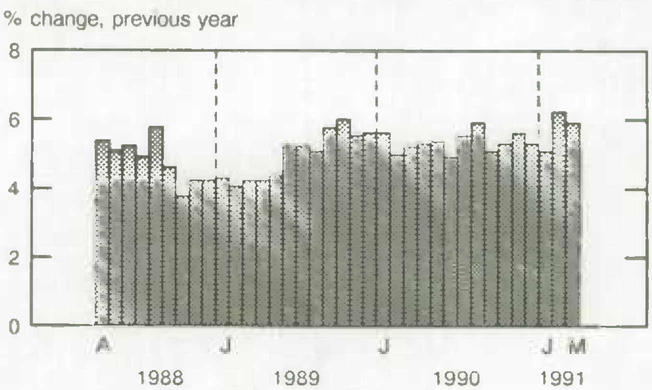
Strong Growth in Average Weekly Earnings

In March, average weekly earnings were 5.9% higher than a year earlier. This year-over-year growth is the highest since August 1990 (with the exception of February 1991).

Earnings growth in goods-producing industries was 4.8%, compared with the annual growth rates of 5.8% in 1990 and 5.4% in 1989. For the second straight month, the highest year-over-year increase was posted in forestry. The 6.7% increase is well above the average annual growth rate for 1990 and marginally above the rate for 1989. Earnings in manufacturing and construction grew at significantly lower rates than the averages for the two previous years.

In service-producing industries, earnings growth was 7.1%, accelerating from average annual growth rates of 5.8% in 1990 and 4.8% in 1989. Earnings growth in communication and other utilities, and community, business and personal services was also high compared to annual averages for the two previous years. In contrast, growth in earnings in trade was below the annual averages for 1990 and 1989.

Average Weekly Earnings



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... Strong Growth in Average Weekly Earnings

In goods-producing industries, employees paid by the hour worked an average of 37.4 hours per week, lower than the average for March 1990 (38.5) and earned on average $16.00 per hour. In service-producing industries, hourly-paid employees worked on average 27.5 hours, slightly below the average workweek last year, and earned $11.99 per hour.

Note: Average weekly and hourly earnings data are affected by the composition of employment by industry, occupation and province, as well as by changes in the underlying rates of pay. Fixed-weighted average hourly earnings data have been constructed (see "Recent Trends in Wages", an article in the Winter issue of *Perspectives on Labour and Income*).

For further information, order Employment, Earnings and Hours (catalogue number 72-002) or contact Labour Division at (613) 951-4090 (FAX: 951-4087).

PROVINCIAL PERSPECTIVES

Average Weekly Earnings, March 1991 (Unadjusted Data)

Province	Industrial Aggregate		Goods-producing Industries		Service-producing Industries	
	($)	% change, previous year	($)	% change, previous year	($)	% change, previous year
Canada	**532.22**	**5.9**	**652.63**	**4.8**	**497.64**	**7.1**
Newfoundland	504.80	5.8	609.16	6.2	487.66	5.8
Prince Edward Island	435.84	5.0	457.72	13.8	432.84	3.9
Nova Scotia	472.55	4.5	569.19	4.1	451.83	5.1
New Brunswick	485.85	6.2	588.70	3.1	460.93	7.6
Quebec	522.10	6.7	602.10	3.6	498.25	8.6
Ontario	555.17	5.5	667.84	4.7	518.54	7.0
Manitoba	475.37	3.3	548.22	3.2	460.20	3.7
Saskatchewan	457.85	5.8	614.61	7.5	435.36	5.9
Alberta	534.47	6.8	764.02	8.3	473.32	5.9
British Columbia	536.14	6.4	675.99	3.6	497.21	7.5

Falling Crude Oil Prices Continue to Push Down RMPI

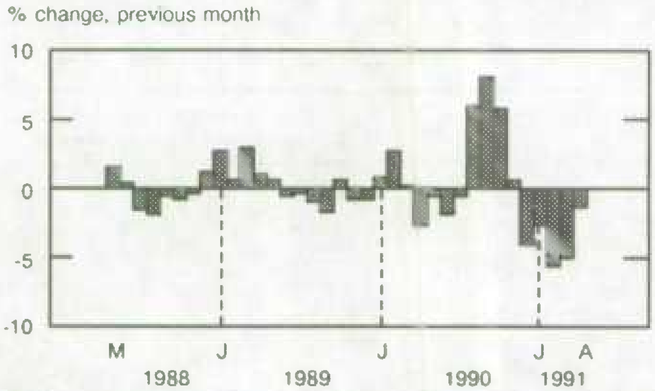
In April, the Raw Materials Price Index registered its fifth consecutive monthly decline. This 1.4% decrease was mainly due to a fall in crude oil prices. Out of the RMPI's seven components, only two registered increases.

Mineral fuels, which accounts approximately for one-third of the index, dropped by 3.9% in April. This decrease was mainly attributable to a 4.1% fall in crude mineral oil prices. Since November 1990 crude oil prices have plunged 40.0%. The RMPI excluding mineral fuels declined 0.3% in April.

For the second straight month, prices of animals and animal products decreased (0.6%), reflecting a 2.7% fall in hog prices.

In April, prices for aluminum metals plunged 4.2%, pushing the non-ferrous metals component down 1.3%. Since October, the index has fallen steadily to a cumulative total of 18.0%.

Raw Materials Price Index



For further information order Industry Price Indexes (catalogue number 62-011) or contact Prices Division at (613) 951-9607.

Industrial Product Price Index: Third Straight Drop

In April, the Industrial Product Price Index edged down 0.3% to 109.7. This is the third consecutive monthly decline registered by the IPPI. Of the 21 major groups, 12 decreased while six increased and three stayed unchanged.

A 3.1% drop in pulp prices and a 3.3% fall in newsprint prices were the main contributors to the 1.7% decrease in the index for paper and paper products. Pulp prices have been generally declining since the February 1990 peak due to weak demand and over-capacity in the industry. Because newsprint manufacturers' attempts to increase prices in January 1991 did not hold with the market conditions, newsprint prices have declined in March and April.

The petroleum and coal products index registered its fourth consecutive decline, falling an estimated 1.2% in April. This decrease mainly reflected lower prices for fuel oils and other fuel.

Due to a lower U.S. dollar, the autos, trucks and other transport equipment index was down 0.3%. The chemical products component also decreased by 0.3%, the third consecutive monthly decline. A 2.3% fall in the prices of synthetic resins was largely responsible for the drop.

After an increase of 1.2% in March 1991, that followed nine straight monthly declines, the lumber, sawmill and other wood products index was up a further 1.6% in April. Higher prices were registered for softwood lumber, Douglas fir plywood and other softwood plywood.

For further information, order Industry Price Indexes (catalogue number 62-011) or contact Prices Division at (613) 951-9607.

Regular UI Beneficiaries Continue to Rise Sharply

In March, the seasonally adjusted number of regular unemployment insurance beneficiaries rose 3.5% to 1.2 million, the highest level since March 1983. This was the seventh straight monthly increase. The number receiving regular benefits was higher in all provinces and territories. (See accompanying table.)

Total benefit payments rose 3.5% to reach a level of $1.4 billion in March. This increase was well above the average for the previous six months. Following a 7.2% drop in February, the number of benefit weeks rose 1.3% to 5.8 million.

UI Beneficiaries Receiving Regular Benefits

Province/Territory	Total (000)	% change, previous month	% change, previous year
Canada	**1,220.0**	**3.5**	**36.2**
Newfoundland	69.8	1.8	5.6
Prince Edward Island	12.4	2.6	6.7
Nova Scotia	52.8	2.8	16.3
New Brunswick	58.4	3.0	12.5
Quebec	391.4	1.8	25.9
Ontario	355.9	6.2	85.6
Manitoba	33.3	2.6	21.0
Saskatchewan	24.9	0.8	12.9
Alberta	75.0	1.9	27.4
British Columbia	141.5	4.4	32.0
Yukon	1.6	2.2	6.7
Northwest Territories	1.6	1.1	25.4

U.I. Beneficiaries Receiving Regular Benefits

For further information, order Unemployment Insurance Statistics (catalogue number 73-001) or contact Labour Division at (613) 951-4044 (FAX: 951-4087).

Farm Cash Receipts Continue to Decline

Farm cash receipts for the first quarter 1991 were down 4% from the first quarter of the previous year to $5.6 billion. Declines in crop receipts and direct program payments were not offset by higher livestock receipts.

Crop receipts fell 10% to $2.4 billion, the first drop since 1987. The Canadian Wheat Board final payment (the profit from grain sales after purchasing and marketing expenses are deducted) for wheat was 40% below the final payment made on the previous crop. Soybean, potato and corn receipts fell 55%, 28% and 21% respectively because of lower prices and marketings. Wheat receipts rose 13% due to record marketings.

Direct program payments fell 9% to $430 million. Sharp declines in crop insurance and tripartite payments were responsible for the drop. Crop insurance payments fell 73% due to good growing conditions in 1990, while payments under tripartite plans fell 87% primarily because of lower payments for hogs.

Livestock and animal product receipts increased 2% to a record $2.7 billion. Hog receipts increased 5%, largely due to prices which in the first quarter of 1991 were at their highest level since 1987. Cattle receipts remained unchanged as a slight drop in prices was offset by an increase in the quantities marketed. Turkey receipts fell 6% reflecting lower prices and marketings.

For further information, order Farm Cash Receipts (catalogue number 21-001) or contact Agriculture Division at (613) 951-8706.

Department Store Sales Edge Up

Following a 9.7% rise in February and a sharp drop in January, seasonally adjusted department store sales increased by 0.1% in March. This brought the total sales level to $1.1 billion. In the last five months, department store sales have registered a cumulative decline of 5.9%. The 19.0% drop in January more than offset gains in the other four months.

Department store inventories reached $4.8 billion at the end of March, a 1.2% increase. This rise followed a 4.2% gain in February and a decline of 8.3% in January. Inventories have registered a cumulative decline of 4.3% since November 1990. Decreases in December and January more than offset gains in the other three months.

The ratio of stocks to sales was up 1.1% to 4.39:1, a slight increase from the average ratio of 4.31:1 observed in the three previous months.

Note: *Department store sales estimates exclude the Goods and Services Tax (GST). Prior to January 1991, sales data include the Federal Sales Tax (FST). Due to this change in indirect taxes, data for 1991 are not strictly comparable with those of previous years.*

Department Store Sales

Note: The data prior to January 1991 have been adjusted to eliminate the effect of the shift in indirect taxes.

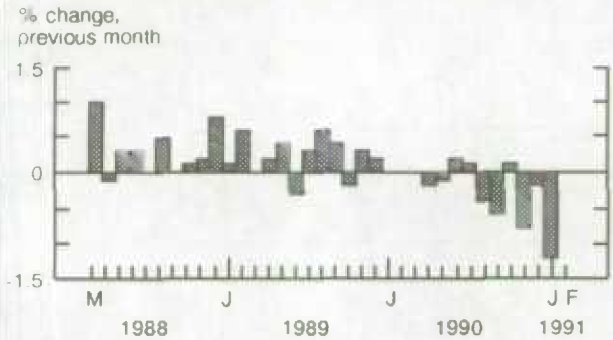
For further information, order Department Store Sales and Stocks (catalogue number 63-002) or contact Industry Division at (613) 951-3552.

PUBLICATIONS RELEASED FROM MAY 24 TO 30, 1991

Division/title	Period	Catalogue Number	Price: Issue/Subscription Canada ($Cdn.)	United States ($US)	Other Countries ($US)
AGRICULTURE					
Fruit and Vegetable Production	May 1991	22-003	18/72	21.50/86	25.25/101
The Dairy Review	March 1991	23-001	12.20/122	14.60/146	17.10/171
DEMOGRAPHY					
Postcensal Annual Estimates of Population for Census Divisions and Census Metropolitan Areas	June 1 1989 (Component Method)	91-212	22	26	31
INDUSTRY					
Coal Mines	1989	26-206	22	26	31
Corrugated Boxes and Wrappers	April 1991	36-004	5/50	6/60	7/70
Electric Lamps (light bulbs and tubes)	April 1991	43-009	5/50	6/60	7/70
Gas Utilities	January 1991	55-002	12.70/127	15.20/152	17.80/178
Mineral Wool Including Fibrous Glass Insulation	April 1991	44-004	5/50	6/60	7/70
Monthly Production of Soft Drinks	April 1991	32-001	2.70/27	3.20/32	3.80/38
Production and Disposition of Tobacco Products	April 1991	32-022	5/50	6/60	7/70
Production and Stocks of Tea, Coffee and Cocoa	Quarter ended March 1991	32-025	6.75/27	8/32	9.50/38
Production, Shipments and Stocks on Hand of Sawmills East of the Rockies(Excluding Newfoundland and Prince Edward Island)	March 1991	35-002	10/100	12/120	14/140
Production, Shipments and Stocks on Hand of Sawmills in British Columbia	March 1991	35-003	7.10/71	8.50/85	9.90/99
INTERNATIONAL TRADE					
Exports - Merchandise Trade	1990	65-202	166	199	232
Imports - Merchandise Trade	1990	65-203	166	199	232
JUSTICE					
Juristat - Service Bulletin - Preliminary Crime Statistics (Vol. 11, No. 9)	May 1991	85-002	3.60/90	4.30/108	5/126
LABOUR					
Employment, Earnings and Hours	February 1991	72-002	38.50/385	46.20/462	53.90/539
PRICES					
Industry Price Indexes	March 1991	62-011	18.20/182	21.80/218	25.50/255
SERVICES, SCIENCE AND TECHNOLOGY					
Restaurant, Caterer and Tavern Statistics	January 1991	63-011	6.10/61	7.30/73	8.50/85

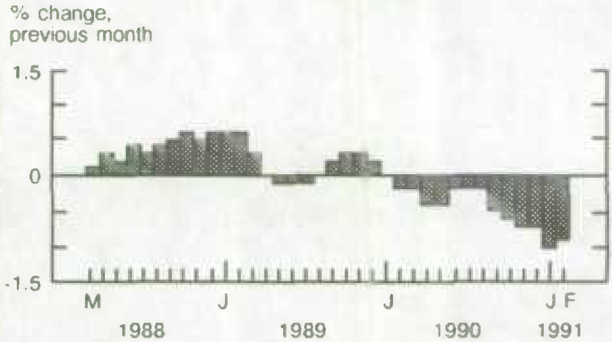
CURRENT TRENDS

Gross Domestic Product



Due to a pickup in activity in service-producing industries, real GDP at factor cost was unchanged in February, after declining steadily since October 1990.

Composite Leading Indicator



The composite leading indicator declined for the thirteenth consecutive month in February.

Consumer Price Index

In April, the Consumer Price Index year-over-year increase remained at its March level of 6.3%.

Unemployment Rate

In April, the seasonally adjusted unemployment rate fell for the first time since June 1990.

Manufacturing

Manufacturing shipments declined by 0.3% in February, following sharper decreases in the previous three months. Unfilled orders fell 1.4%, the seventh straight drop.

Merchandise Trade

In March, imports fell 4.6% while exports decreased marginally (-0.2%).

Note: *All series are seasonally adjusted except the consumer price index.*

LATEST MONTHLY STATISTICS

	Period	Level	Change Previous Period	Change Previous Year
GENERAL				
Gross Domestic Product ($ billion, 1986)	February	497	0.0%	-3.1%
Composite Leading Indicator (1981 = 100)	February	137.1	-0.9%	-5.9%
Profits of Industrial Corporations ($ billion)	3rd Quarter	5.2	13.6%	-29.5%
DOMESTIC DEMAND				
Retail Trade ($ billion)	March	14.6	-1.3%	-9.1%
New Motor Vehicle Sales ('000 units)	March	99.0	-4.5%	-17.2%
LABOUR				
Employment (millions)	April	12.3	0.3%	-2.4%
Unemployment Rate (%)	April	10.2	-0.3	2.9
Participation Rate (%)	April	66.4	-0.1	-0.5
Labour Income ($ billion)	February	31.7	-0.3%	2.1%
Average Weekly Earnings ($)	March*	532.22	0.7%	5.9%
INTERNATIONAL TRADE				
Merchandise Exports ($ billion)	March	11.2	-0.2%	-9.9%
Merchandise Imports ($ billion)	March	10.0	-4.6%	-11.9%
Merchandise Trade Balance ($ billion)	March	1.2	0.5	0.1
MANUFACTURING				
Shipments ($ billion)	February	23.1	-0.3%	-6.1%
New Orders ($ billion)	February	22.7	-1.2%	-5.6%
Unfilled Orders ($ billion)	February	26.1	-1.4%	-8.8%
Inventory/ Shipments Ratio	February	1.59	0.01	0.03
Capacity Utilization (%)	4th Quarter	74	-3.6	-7.8
PRICES				
Consumer Price Index (1986 = 100)	April	125.5	0.0%	6.3%
Industrial Product Price Index (1986 = 100)	April*	109.7	-0.3%	0.5%
Raw Materials Price Index (1986 = 100)	April*	103.3	-1.4%	-2.6%
New Housing Price Index (1986 = 100)	March	130.6	0.2%	-11.0%

Note: *All series are seasonally adjusted with the exception of average weekly earnings and the price indexes.*
* *New this week.*

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Statistics Canada.

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KEY RELEASE CALENDAR: JUNE 1991*

Monday	Tuesday	Wednesday	Thursday	Friday
3	4	5 Survey of Manufacturing, March Help-Wanted Index, May	6	7 Labour Force Survey, May International Travel, April
10 New Motor Vehicle Sales, April New Housing Price Index, April	11 Financial Statistics for Enterprises, 1st Quarter Farm Product Price Index, April	12 Composite Leading Indicator, March	13	14 Consumer Price Index, May
17	18 Survey of Manufacturing, April	19 International Merchandise Trade, April	20 Income and Expenditure Accounts, 1st Quarter Balance of Payments, 1st Quarter Financial Flow Accounts, 1st Quarter	21 Retail Trade, April Department Store Sales and Stocks, April
24 Wholesale Trade, April	25 International Transactions in Securities, April	26 Unemployment Insurance Statistics, April Industrial Product Price Index, May Raw Materials Price Index, May	27 Building Permits, April Employment, Earnings and Hours, April	28 Real Gross Domestic Product at Factor Cost by Industry, April Capacity Utilization Rates in Manufacturing Industries, 1st Quarter Field Crop Reporting Series: no 4-Preliminary Estimates of Principal Field Crop Area

* Release dates for International Trade, the Consumer Price Index and the Labour Force Survey are fixed; dates for other data series may change.

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