



# INFO·M·A·T

## A WEEKLY REVIEW

Friday, November 29, 1991

### OVERVIEW

#### ■ Sharp Decrease in Number of Unemployment Insurance Beneficiaries

The seasonally adjusted number of beneficiaries receiving regular benefits dropped by 3.8% to 1,121,000 in September. This is the largest monthly decrease registered in the past 10 years.

#### ■ Slower Growth in Average Weekly Earnings

In September, average weekly earnings in Canadian industry were estimated at \$544.92, up 4.7% from September 1990, but down 0.3% from August 1991.

#### ■ Industrial Product Price Index: Eight-month Downturn Interrupted

In October, the Industrial Product Price Index remained at 107.6, unchanged from September's level, interrupting the downward trend evident since the spring.

#### ■ Raw Materials Price Index Unchanged in October

The Raw Materials Price Index remained at 102.6 in October, unchanged from the level posted in September.

#### ■ Foreign Investment Still Strong

In September, non-residents invested \$3.3 billion in Canadian securities following a record \$5.0 billion investment in August.

#### ■ International Travel: Sharp Decline in All Cross-border Trips

Cross-border travel dropped sharply in September mainly because of delays at Canada's ports of entry due to various labour disputes.

#### ■ Downturn in Wholesale Merchants' Sales

Sales of wholesale merchants fell 0.5% to \$15.1 billion in September, breaking the upward momentum which began in February.

This issue also contains information on Department Store Sales, Production of Crude Oil and Natural Gas and Farm Cash Receipts.

### Sharp Decrease in Number of Unemployment Insurance Beneficiaries

The seasonally adjusted number of beneficiaries receiving regular benefits dropped by 3.8% to 1,121,000 in September. This is the largest monthly decrease registered in the past 10 years.

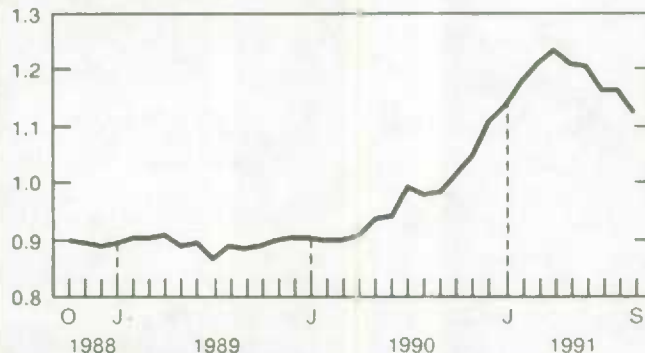
The number of beneficiaries decreased in nine of the 10 provinces and one territory. The most important declines occurred in Ontario (-7.3%), the Yukon (-5.7%) and Newfoundland (-5.3%), followed by Nova Scotia (-3.4%), British Columbia (-3.1%) and Quebec (-2.6%). Manitoba and the Northwest Territories recorded slight increases, 2.2% and 1.6%, respectively.

Total benefit payments were up 4.3% to \$1,553 million in September, following a 6.1% decrease in August. After falling in August, the number of benefit weeks advanced 0.9% to 5.9 million in September.

For further information, order *Unemployment Insurance Statistics* (catalogue number 73-001) or contact *Labour Division* at (613) 951-4045.

#### U.I. Beneficiaries Receiving Regular Benefits

Millions, seasonally adjusted



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### ... Industrial Product Price Index: Eight-month Downturn Interrupted

The index for printing and publishing went up 1.0% due mainly to a rise of 5.3% in the index for business accounting records. A 2.2% price increase

for Canadian-made automobiles, to reflect the introduction of the 1992 models, pushed the autos, trucks and other transportation equipment index up 0.6% in October.

For further information contact Prices Division at (613) 951-9607.

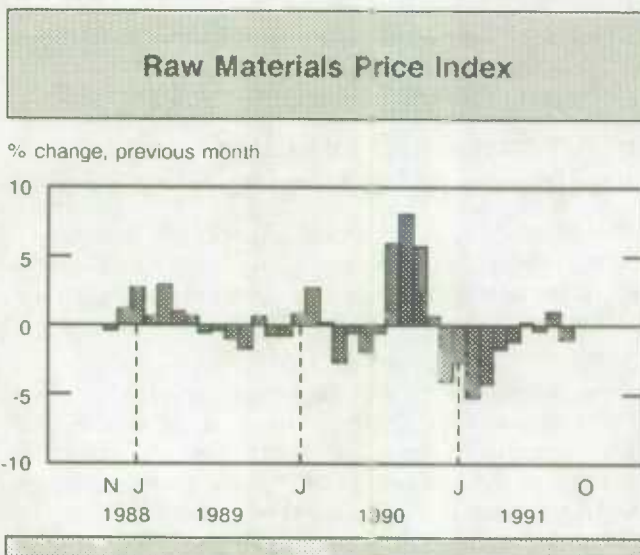
### Raw Materials Price Index Unchanged in October

The Raw Materials Price Index (RMPI) (1986 = 100) remained at 102.6 in October, unchanged from the level posted in September. The year-over-year decrease between October 1990 and October 1991 was 17.7%, due mainly to drops in mineral fuel prices (-33.9%) and prices of non-ferrous metals (-20.6%). The RMPI excluding mineral fuels fell 6.5% in October compared to last year.

Higher prices for crude oil pushed the mineral fuels price index up 1.4% in October. Mineral fuels account for roughly one-third of the RMPI index. The animal and animal products price index, which carries one-quarter of the overall weight, edged up 0.4% while the non-metallic minerals index remained unchanged.

Non-ferrous metal products posted the largest price decrease (-2.2%), reaching 91.9, their lowest level since 1986. Declines in prices of aluminum materials (-7.5%) and concentrates of zinc (-10.5%) accounted for the decline. However, the fall was moderated by a 2.6% increase in prices of precious metals.

The vegetable products index fell 1.6%, largely due to a decline in prices of raw tobacco (-7.1%),



cocoa, coffee and tea (-5.8%) and oilseeds (-3.4%). The overall fall was offset by a 4.1% rise in wheat prices.

Declines in prices for logs and bolts (-1.1%) and pulpwood (-0.4%) pushed the wood index down 0.9% to a level of 121.6.

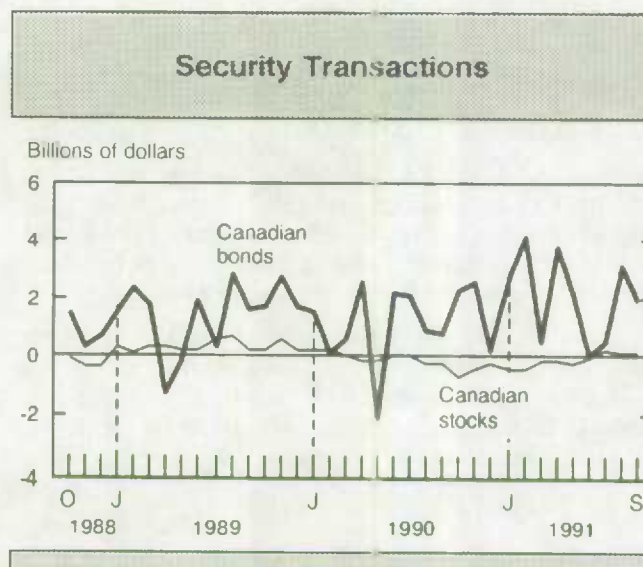
For further information contact Prices Division at (613) 951-9607.

### Foreign Investment Still Strong

Non-residents invested \$3.3 billion in Canadian securities in September, in addition to the revised record \$5.0 billion investment posted in August. Foreign investment was split between bonds and the Canadian money market.

Net foreign investment in Canadian bonds totalled \$1.9 billion, down from \$3.1 billion invested in August. The reduction came from the primary market where record retirements of Canadian bonds held by non-residents (-\$2.7 billion) largely offset new bond sales (\$3.5 billion). In the secondary market, net foreign buying remained at \$1.0 billion, unchanged from the previous month.

In the Canadian money market, non-residents invested \$1.3 billion, down from \$1.8 billion in August. September's foreign investment was in Government of Canada paper (\$1.4 billion).



(continued on page 4)

### ... Foreign Investment Still Strong

Non-residents increased their holdings of Canadian stocks by \$134 million in September, the third straight monthly net investment, totalling \$435 million.

Canadian residents bought a net \$0.6 billion of foreign securities, the bulk of which was directed to foreign bonds, bringing the year-to-date investment to \$4.7 billion.

*For further information contact Balance of Payments Division at (613) 951-1864.*

## International Travel: Sharp Decline in All Cross-border Trips

Cross-border travel dropped sharply in September mainly because of delays at Canada's ports of entry due to various labour disputes, including the strike by the members of the Public Service Alliance of Canada.

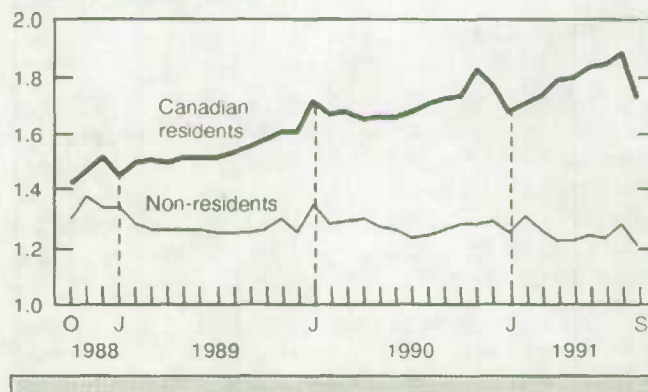
On a seasonally adjusted basis, overnight trips by Canadian residents to the United States fell 9.6%, the first drop after seven straight monthly increases, but the number of trips to other countries was unchanged from the level posted in August. In total, overnight trips by Canadians fell to 1.7 million in September.

Travellers from the U.S. on trips of one or more nights to Canada decreased by 6.7%, reaching the lowest volume since September 1985.

Same-day automobile visits by Canadians to the U.S. were down 3.2% in September, continuing the downward trend evident since the spring.

### Trips of One or More Nights between Canada and Other Countries

Millions, seasonally adjusted



*For further information, order International Travel - Advance Information (catalogue number 66-001P), or contact Education, Culture and Tourism Division at (613) 951-8933.*

## Downturn in Wholesale Merchants' Sales

Seasonally adjusted wholesale merchants' sales totalled \$15.1 billion in September, down 0.5% from the revised August level. The September decline in wholesale merchants' sales marked a break from the upward momentum which began in February.

Five of the nine trade groups registered lower sales in September. Wholesalers of other machinery, equipment and supplies recorded the largest decrease (in dollar terms), falling 1.6%, followed by metals, hardware, plumbing and

heating equipment and supplies (-3.1%) and lumber and building materials (-1.8%).

Modest gains were reported by food, beverage, drug and tobacco product suppliers (0.9%), and by suppliers of other products and motor vehicles, parts and accessories (both 0.3%).

Provincially, lower sales were recorded in six provinces, ranging from -2.6% in Prince Edward Island to -0.6% in Newfoundland and Ontario.

*For further information, order Wholesale Trade (catalogue number 63-008) or contact the Industry Division at (613) 951-3540.*



## Department Store Sales Decrease

Following three months of flat sales, seasonally adjusted department store sales (including concessions) fell 2.0% to \$1,066 million in September. In total, department store sales slipped 0.3% in the third quarter of 1991 compared to an increase of 2.4% in the second quarter.

The September decrease was broadly-based with 29 of the 40 major commodity lines recording lower sales. In terms of dollar value, declines were most pronounced in the following lines: men's casual wear and furnishings (-7.0%), sports equipment,

athletic apparel and luggage (-5.5%) and infants and children's wear and nursery equipment (-2.3%). Notable increases were posted by the women's and misses' coats and suits category (+11.4%), followed by hardware, paints and wallpaper (+5.2%) and toiletries, cosmetics and pharmaceutical products (+1.3%).

Department store stocks were up 0.7% to \$5,134 million at the end of September. The ratio of stocks to sales stood at 4.82.

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

## Production of Crude Oil Down, Natural Gas Up

Production of crude oil and equivalent hydrocarbons amounted to 8.3 million cubic metres in August, down 0.4% from the same month in 1990. However, year-to-date production recorded a 0.8% increase from the previous year.

Exports of crude oil increased 10.7% in August, bringing the year-to-date exports to 29.6 million cubic metres, up 19.4% over last year. Imports of

crude oil fell 1.3% in August. Year-to-date imports totalled 20.1 million cubic metres, 1.9% behind last year.

Marketable production of natural gas stood at 7.5 billion cubic metres, up 2.2% from a year earlier. Exports rose 6.7% over August 1990, the seventeenth consecutive monthly increase. Sales of natural gas in Canada, including direct sales, were down 1.6% from August 1990.

*For further information, order Crude Oil and Natural Gas Production (catalogue number 26-006) or contact Industry Division at (613) 951-3562.*

## Farm Cash Receipts Continue to Decline

Compared to the same period a year earlier, farm cash receipts for January to September 1991 fell 6% to \$15 billion. Direct program payments dropped 45% while livestock and crop receipts were down 3% and 1%, respectively.

Declines in farm cash receipts were registered in all of the provinces except in Newfoundland where receipts remained virtually unchanged. Prince Edward Island and New Brunswick experienced the largest drops, 12% and 10%, respectively, due to decreases in potato receipts. Reduced program payments were responsible for declines in Saskatchewan (-8.6%), Alberta (-8.7%) and Manitoba (-6.3%).

Direct program payments fell from \$1.5 billion to \$0.8 billion for the first three quarters of 1991. Sharp declines in ad hoc payments, crop insurance and tripartite plan payments were responsible for

the drop. The first payments under the Net Income Stabilization Account (NISA), totalling \$148,000, were made to Saskatchewan producers in late September.

Livestock and animal product receipts decreased to \$8.0 billion from the record \$8.3 billion reached during the same period last year. Cattle receipts fell 6% due to declines in both sales and prices. Lower prices were mainly responsible for the decline in hog receipts (-6%). Dairy receipts posted the first decrease since 1983 as reduced sales more than offset a marginal increase in prices.

Crop receipts were \$6.5 billion for the first nine months of 1991. Canadian Wheat Board payments fell to \$315 million, due to lower payments for wheat, excluding durum. Also responsible for the decrease were fewer liquidations of deferred grain receipts and lower soybeans, canola, oilseeds and potato receipts.

*For further information order Farm Cash Receipts (catalogue number 21-001) or contact Agriculture Division at (613) 951-0375.*

# PUBLICATIONS RELEASED FROM NOVEMBER 22 TO 28, 1991

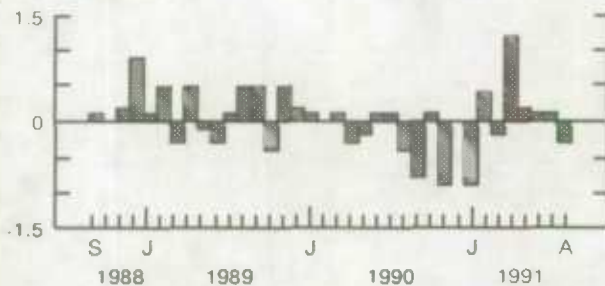
Division/title	Period	Catalogue Number	Price: Issue/Subscription		
			Canada (\$Cdn.)	United States	Other Countries
			\$US		
<b>AGRICULTURE</b>					
The Dairy Review	September 1991	23-001	12.20/122	14.60/146	17.10/171
<b>CURRENT ECONOMIC ANALYSIS</b>					
Canadian Economic Observer	November 1991	11-010	22/220	26/260	31/310
<b>EDUCATION, CULTURE AND TOURISM</b>					
Education Price Index - Selected Inputs, Elementary and Secondary Level	1990	81-002	4.90/49	5.90/59	6.90/69
International Travel	September 1991	66-001	6.10/61	7.30/73	8.50/85
Tuition and Living Accommodation costs at Canadian Universities	1990-91 and 1991-92	81-219	22	26	31
<b>HOUSING, FAMILY AND SOCIAL STATISTICS</b>					
Canadians in the Pre-retirement Years: A Profile of People aged 55-64		89-521E	36	43	50
<b>INDUSTRIAL ORGANIZATION AND FINANCE</b>					
Corporations and Labour Unions Returns Act, Part 1: Corporations	1988	61-210	65	78	91
<b>INDUSTRY</b>					
Canned and Frozen Fruits and Vegetables	September 1991	32-011	5/50	6/60	7/70
Corrugated Boxes and Wrappers	October 1991	36-004	5/50	6/60	7/70
Crude Petroleum and Natural Gas Production	August 1991	26-006	10/100	12/120	14/140
Food Industries	1988	32-250	35	42	49
Mineral Wool Including Fibrous Glass Insulation	October 1991	44-004	5/50	6/60	7/70
Monthly Survey of Manufacturing	September 1991	31-001	17.30/173	20.80/208	24.20/242
New Motor Vehicle Sales	March 1991	63-007	14.40/144	17.30/173	20.20/202
Production and Disposition of Tobacco Products	October 1991	32-022	5/50	6/60	7/70
Production and Stocks of Tea, Coffee and Cocoa	Quarter ended September 1991	32-025	6.75/27	8/32	9.50/38
Production, Shipments and Stocks on Hand of Sawmills East of the Rockies	September 1991	35-002	10/100	12/120	14/140
Production, Shipments and Stocks on Hand of Sawmills in British Columbia	September 1991	35-003	7.10/71	8.50/85	9.90/99
Quarterly Shipments of Household Furniture Products	Quarter Ended September 1991	35-007	6.75/27	8/32	9.50/38
<b>PRICES</b>					
Industry Price Indexes	September 1991	62-011	18.20/182	21.80/218	25.50/255
<b>SERVICES, SCIENCE AND TECHNOLOGY</b>					
Business Services Preliminary Estimates	1989	63-015P	7.20/43	8.65/52	10/60
Telephone Statistics	September 1991	56-002	8.30/83	10/100	11.60/116
<b>TRANSPORTATION</b>					
Aviation Statistics Centre Service Bulletin	November 1991	51-004	9.30/93	11.20/112	13/130
Canadian Civil Aviation	1990	51-206	36	43	50



## CURRENT TRENDS

### Gross Domestic Product

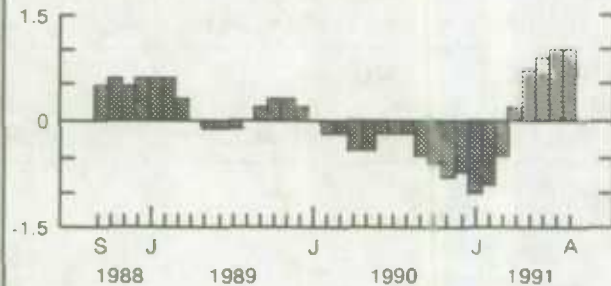
% change,  
previous month



GDP at factor cost fell 0.3% in August. Service-producing industries posted a 0.5% decrease but goods-producing industries remained at July's level.

### Composite Leading Indicator

% change,  
previous month



The composite leading indicator advanced 1.0% in August, the same rate of growth as in July, and the fifth consecutive monthly increase.

### Consumer Price Index

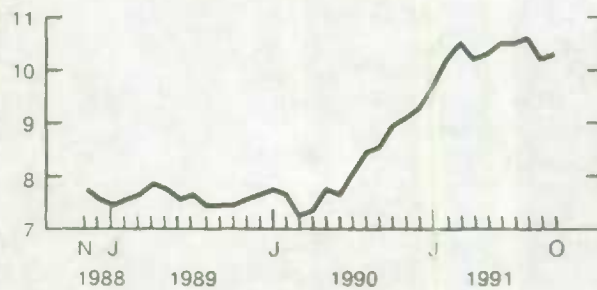
% change,  
previous year



In October, the all-items CPI fell 0.2%, similar to the drop posted in September and the food index continued to decline (-0.8%).

### Unemployment Rate

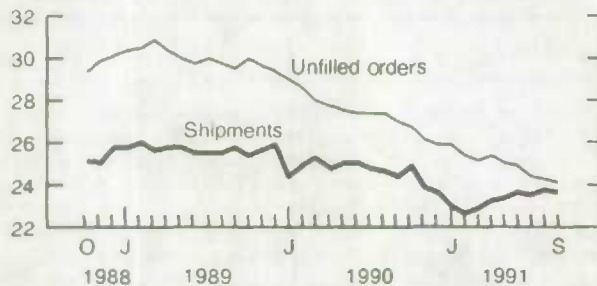
%



The unemployment rate edged up by 0.1 percentage points to 10.3 in October, following a drop of 0.4 points in September.

### Manufacturing

Billions  
of dollars



Canadian manufacturers' shipments slipped 0.4% in September to \$23.5 billion. Unfilled orders continued their two-year decline.

### Merchandise Trade

Billions  
of dollars



In September, imports climbed 4.6% to \$11.9 billion while exports fell 6.9% to \$11.6 billion, reducing the trade balance by \$1.4 billion.

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

## LATEST MONTHLY STATISTICS

	Period	Level	Change Previous Period	Change Previous Year
<b>GENERAL</b>				
Gross Domestic Product (\$ billion, 1986)	August	503	-0.3%	-0.9%
Composite Leading Indicator (1981 = 100)	August	141.5	1.0%	-1.3%
Profits of Industrial Corporations (\$ billion)	2nd Quarter	11.8	0.0%	-26.7%
<b>DOMESTIC DEMAND</b>				
Retail Trade (\$ billion)	September	15.0	0.8%	-5.6%
New Motor Vehicle Sales ('000 units)	September	115.7	13.4%	9.4%
<b>LABOUR</b>				
Employment (millions)	October	12.4	0.2%	-1.3%
Unemployment Rate (%)	October	10.3	0.1	1.4
Participation Rate (%)	October	66.3	0.1	-0.8
Labour Income (\$ billion)	August	32.5	0.2%	3.8%
Average Weekly Earnings (\$)	September*	544.92	-0.3%	4.7%
<b>INTERNATIONAL TRADE</b>				
Merchandise Exports (\$ billion)	September	11.6	-6.9%	-5.0%
Merchandise Imports (\$ billion)	September	11.9	4.6%	8.0%
Merchandise Trade Balance (\$ billion)	September	-0.3	-1.4	-0.88
<b>MANUFACTURING</b>				
Shipments (\$ billion)	September	23.5	-0.4%	-3.1%
New Orders (\$ billion)	September	23.4	-0.3%	-2.1%
Unfilled Orders (\$ billion)	September	24.0	-0.6%	-11.0%
Inventory/Shipments Ratio	September	1.49	0.0	-0.09
Capacity Utilization (%)	2nd Quarter	71.3	1.2	-5.6
<b>PRICES</b>				
Consumer Price Index (1986 = 100)	October	126.5	-0.2%	4.4%
Industrial Product Price Index (1986 = 100)	October*	107.6	0.0%	-2.7%
Raw Materials Price Index (1986 = 100)	October*	102.6	0.0%	-17.7%
New Housing Price Index (1986 = 100)	September	134.4	0.0%	-4.9%

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

\* New this week.

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### A Weekly Review

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# KEY RELEASE CALENDAR: DECEMBER 1991\*

Monday	Tuesday	Wednesday	Thursday	Friday
<b>2</b> Canadian Composite Leading Indicator, September Sales of Refined Petroleum Products, October	<b>3</b> Charitable Donations Data for Postal Areas, 1990	<b>4</b> Help-wanted Index, November RRSP and Investment Market Statistics for Postal Areas, 1990	<b>5</b>	<b>6</b> Labour Force Survey, November
<b>9</b> New Motor Vehicle Sales, October Estimates of Labour Income, September	<b>10</b> New Housing Price Index, October Capacity Utilization Rates, Third Quarter Department Store Sales by Province and Metropolitan Area, October	<b>11</b> Farm Product Price Index, October	<b>12</b>	<b>13</b> Monthly Survey of Manufacturing, October Travel Between Canada and Other Countries, October
<b>16</b>	<b>17</b>	<b>18</b>	<b>19</b> Preliminary Statement of Canadian International Merchandise Trade, October Sales of Natural Gas, October	<b>20</b> Consumer Price Index, November Unemployment Insurance Statistics, October
<b>23</b> Retail Trade, October Wholesale Trade, October Department Store Sales and Stocks, October Canada's International Transactions in Securities, October	<b>24</b> Real Gross Domestic Product at Factor Cost by Industry, October Major Release Dates, January 1992	<b>25</b>	<b>26</b>	<b>27</b>

\* 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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