



IN·F·O·M·A·T

A WEEKLY REVIEW

Friday, August 21, 1992

OVERVIEW

■ Exports Decrease and Imports Climb

In June, merchandise exports fell for the first time in seven months, down 1.5% to a level of \$12.7 billion. Imports rose by 2.7% to \$12.3 billion.

■ Cumulative Total of Manufacturers' Shipments Down from Last Year

The year-to-date value of shipments from January to June 1992 totalled \$137.3 billion, 1.1% lower than in the same period in 1991.

■ Same-day Auto Travel to United States Up in June

After five consecutive monthly decreases, same-day automobile trips to the U.S. by Canadian residents rose for the first time this year.

■ Governments Hired More Employees in 1991-92

In fiscal year 1991-92, employment in government (excluding government business enterprises) was up by 1.1% over 1990-91.

■ Direct Program Payments Push Farm Cash Receipts Up

For the first six months of 1992, farm cash receipts rose 8% to \$11.5 billion due to a sharp increase in direct program payments.

Exports Decrease and Imports Climb

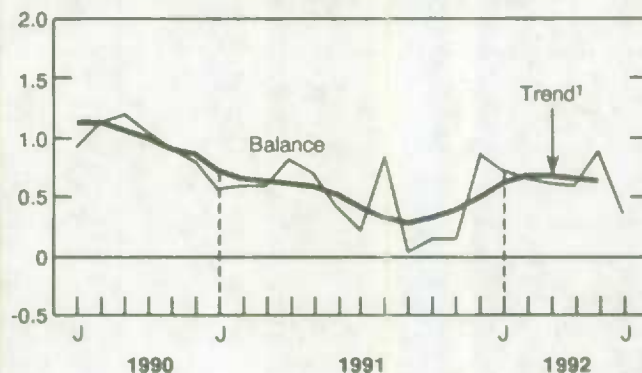
The seasonally adjusted value of exports fell for the first time in seven months, a drop of \$199 million in June to \$12.7 billion. Decreases were widespread but the largest contributor to the decline was the forestry products sector for which exports fell by \$156 million, largely due to labour disputes in British Columbia. Exports of energy products (-\$107 million) and of aircraft and other transportation equipment (-\$49 million) also showed decreases. Higher exports of agricultural and fishing products, up \$87 million, and miscellaneous consumer goods, up \$27 million, had a somewhat moderating effect on the overall decline.

After a decline of \$125 million in May, seasonally adjusted imports climbed by \$324 million in June to a high of \$12.3 billion. Notable increases were recorded for automotive products

(continued on page 2)

Merchandise Trade Balance

Billions of dollars, seasonally adjusted



¹ The short-term trend represents a weighted average of the data.

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... Exports Decrease and Imports Climb

(\$229 million), energy products (\$186 million), and machinery and equipment excluding aircraft and other transportation equipment (\$58 million). Partly offsetting these increases were reduced imports of industrial goods, down \$36 million, and imports of aircraft and other transportation equipment which fell by \$150 million.

Canada's trade surplus totalled \$353 million, \$522 million lower than the revised May level of \$876 million.

For further information, order *Preliminary Statement of Canadian International Trade* (catalogue number 65-001P), or contact *International Trade Division* at (613) 951-9647. (See also "Current Trends" chart on page 6.)

Cumulative Total of Manufacturers' Shipments Down from Last Year

In June, the seasonally adjusted value of Canadian manufacturers' shipments rose 1.0% to \$23.3 billion. Thirteen of the 22 major groups, accounting for 74% of shipment values, contributed to the increase. Increased shipments of electrical and electronic products (7.8%), food (2.1%) and refined petroleum and coal products (3.8%) were noteworthy. These increases were partly offset by a 5.7% decrease recorded in the paper and allied products industries, largely because of labour disputes in British Columbia. The year-to-date total of the value of shipments was \$137.3 billion, 1.1% lower than in the same period in 1991.

Underlying trends suggested that shipments rose for the fourth consecutive month, with increasing trends in 20 of the 22 major industry groups. Clothing and the leather and allied products industries were the only two groupings which continued to show declining trends.

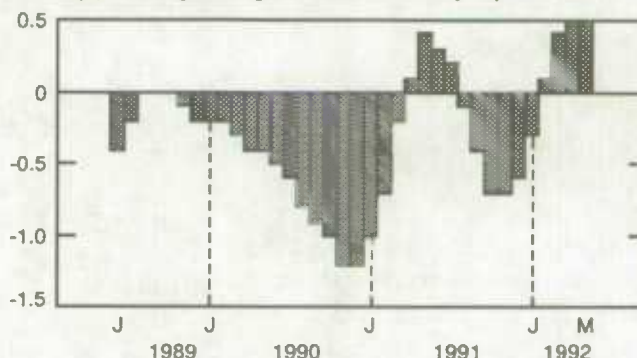
Manufacturers' Shipments, June 1992

Unadjusted Data

Province	Total	
	\$ millions	% change previous year
Canada	25,479	3.7
Newfoundland	138	-9.0
Prince Edward Island	60	17.6
Nova Scotia	477	8.2
New Brunswick	463	-8.7
Québec	5,863	1.2
Ontario	13,776	5.9
Manitoba	568	6.7
Saskatchewan	352	9.3
Alberta	1,691	2.4
British Columbia	2,085	-0.7

Shipments

Monthly percentage change in trend, seasonally adjusted



Note: The short-term trend represents a weighted average of the data.

The stock of unfilled orders, which if not cancelled will generate shipments, decreased for the eighth month in a row, dropping 0.3% to \$21.7 billion. Unfilled orders of electrical and electronic products fell, 2.6%, as did those of the transportation equipment industry, posting a decline of 0.9% in June. In contrast, new orders picked up in June, rising 2.6% to \$23.3 billion after a 1.8% decrease in May.

Inventories owned dropped 0.3% in June to \$34.1 billion, following a marginal increase in May. Inventories dropped in 10 of the 22 major industry groups, with the largest declines in the electrical and electronic products industry (-2.4%), printing and publishing (-8.3%), and machinery, excepting electrical, industries (-3.5%). In contrast, transportation equipment (in particular the aircraft and parts component of the industry) posted a 1.7% increase in inventories. The trend for inventories has been falling since January 1990.

The inventories to shipment ratio decreased from 1.48 in May to a record low of 1.46 in June.

For further information, order *Monthly Survey of Manufacturing* (catalogue number 31-001), or contact *Industry Division* at (613) 951-9832. (See also "Current Trends" chart on page 6.)

Same-day Auto Travel to United States Up in June

The seasonally adjusted volume of overnight trips abroad by Canadian residents stood at 1.83 million in June, unchanged from the previous month. Trips of one night or more by Canadian residents to the U.S. by all modes of travel rose slightly by 0.2%, but trips to countries other than the United States dropped 0.9%.

International Travel Between Canada and Other Countries

June 1992, Seasonally Adjusted

	('000)	% change previous month	% change previous year
One or More Night Trips			
Non-resident Travellers:			
United States	976	-2.2	-3.2
Other Countries	242	-0.3	-0.2
Total	1,218	-1.8	-2.6
Residents of Canada:			
United States	1,571	0.2	-2.8
Other Countries	260	-0.9	11.4
Total	1,831	0.0	-1.1
Auto Re-entries			
Residents of Canada:			
Same-day	4,885	1.7	-0.8
Overnight	1,156	0.1	-4.4

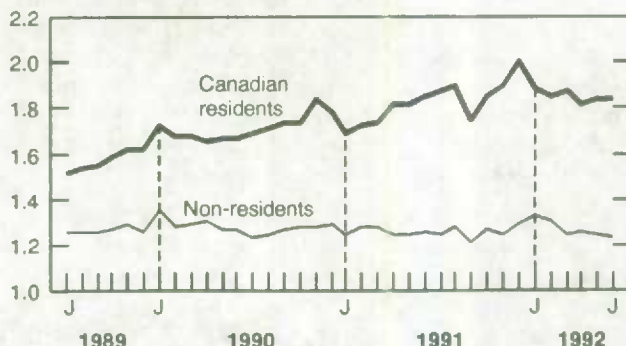
Governments Hired More Employees in 1991-92

In the fiscal year 1991-92, total government employment (excluding government business enterprises) increased by 1.1% over 1990-91 and accounted for 20.9% of all employment in Canada. Remuneration climbed 6.1% over the previous year to \$79.6 billion.

The federal government employed 418,000 people in 1991-92, a rise of 1.9% over 1990-91 but the increase was mainly attributed to the implementation and operation of the Goods and Services Tax (GST) and the hiring of temporary personnel for the 1991 Census. The annual average growth rate for federal government employment from 1987-88 through 1990-91 was 1.1%. Excluding these increases, federal government employment would have declined by 0.3%.

Trips of One or More Nights between Canada and Other Countries

Millions, seasonally adjusted



On the heels of five consecutive monthly decreases, same-day automobile trips to the U.S. by Canadian residents increased 1.7% in June. The number of overnight automobile trips to the U.S. remained relatively stable, edging up marginally by 0.1%.

The number of American visitors who stayed one night or more in Canada dropped 2.2% in June. Similar travellers from overseas fluctuated only slightly in number, dropping 0.3% in June.

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

Note to Users

Government includes departments, agencies, boards, commissions, municipalities, and funds established and controlled by governments, public educational institutions, cultural facilities, hospitals and social agencies, and the bodies administering universal pension plans.

Government business enterprises are organizations engaged in commercial operations. Such enterprises are similar in motivation to private business enterprises and are either in competition with private enterprises or they monopolize markets that would otherwise be serviced by the private sector.

This report includes, for the first time, coverage of 1.2 million public sector employees not previously included and historical revisions.

(continued on page 4)

... Governments Hired More Employees in 1991-92

Provincial and territorial government employment averaged 966,000 employees, a year-over-year increase of 0.9%. The annual average growth rate from 1987-88 through 1990-91 was 1.8%. This component accounted for 8.6% of total employment in Canada and 41.1% of all government employment. Hospital employment, which averaged 496,000 employees, represented 51.4% of provincial and territorial government employment.

Local governments employed 964,000 people in 1991-92, an advance of 1.9% over 1990-91, but smaller than the 3.2% annual average growth rate recorded from 1987-88 through 1990-91. Local school boards, which employed 528,000 employees, accounted for a large part (54.8%) of total local government employment. Hospital employment, representing 7.0% of local government employment, averaged 68,000 employees, a decline of 0.2% from 1990-91.

Federal government business enterprises employed an average of 161,000 people in 1991-92, a decrease of 0.9% from the previous year, and provincial and territorial enterprises employed 151,000 people, a 3.7% year-over-year drop. Local government enterprises hired 1,800 more employees (3.5%) in 1991-92, to a level of 53,000.

Public Sector Employment and Remuneration, Fiscal Year 1991/92

	Employment Averages	% Change from 1990-91	Remuneration (\$ millions)	% Change from 1990-91
Public Sector	2,710,818	1.1	94,224	5.8
Total Government	2,346,711	1.5	79,560	6.1
Federal	417,504	1.9	16,256	1.4
Provincial/ Territorial	965,669	0.9	29,993	5.0
Local	963,538	1.9	33,312	9.5
Total Government Business Enterprise	364,107	-1.5	14,664	4.2
Federal	160,730	-0.9	5,863	3.7
Provincial/ Territorial	150,822	-3.7	6,579	3.6
Local	52,555	3.5	2,222	7.4

For further information, contact Public Institutions Division at (613) 951-8306.

Direct Program Payments Push Farm Cash Receipts Up

Farm cash receipts totalled \$11.5 billion in the first half of 1992, an increase of 8% compared to the same period a year earlier. The strong increase in direct payments, combined with a marginal rise in livestock receipts, more than offset a steep drop in crop receipts.

Provincially, Alberta (15%), Ontario (12%) and Saskatchewan (11%) recorded the largest gains in farm cash receipts. Higher direct payments accounted partly for the increase in all three provinces but Alberta also benefited from higher cattle receipts while Ontario had higher receipts for cattle, corn and soybeans. Declines in farm cash receipts were registered in Nova Scotia (-5%), New Brunswick (-1%), Québec (-0.5%) and British Columbia (-1%).

Direct program payments more than tripled, from \$677 million in the first half of 1991 to \$2.1 billion in the same period of 1992. Payments under the new safety net programs – the Gross Revenue

Insurance Plan (\$602 million) and the Net Income Stabilization Account (\$290 million) – and increases in other (ad hoc) and tripartite payments accounted for the increase. Other (ad hoc) payments reached \$476 million and tripartite payments totalled \$248 million during the first half of 1992.

Livestock receipts for the first six months of 1992 reached \$5.5 billion, 1% above the year-earlier level. Cattle receipts rose 11% to \$2.0 billion as both the value and the number of animals exported reached record highs. Partially offsetting this increase, hog receipts fell 17% to \$820 million, their lowest level since the first six months of 1981. A sharp drop in hog prices (-20%) more than offset increased sales.

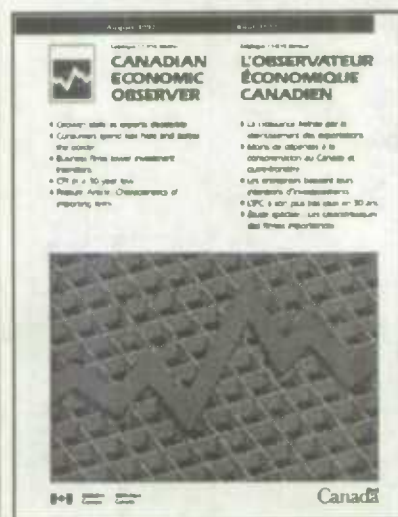
Crop receipts fell 13% to \$3.9 billion. Lower Canadian Wheat Board payments (-32%), fewer liquidations of deferred grain receipts (-24%) and lower receipts for wheat (-31%) and barley (-29%) contributed to the decline.

For further information, order Farm Cash Receipts (catalogue number 21-001) or contact Agriculture Division at (613) 951-8707.

PUBLICATIONS RELEASED FROM AUGUST 14 TO AUGUST 20, 1992

Division/title	Period	Catalogue Number	Price: Issue/Subscription		
			Canada (\$Cdn.)	United States	Other Countries
			\$US		
AGRICULTURE					
Farm Product Price Index	June 1992	62-003	7.10/71	8.50/85	9.90/99
CURRENT ECONOMIC ANALYSIS					
Canadian Economic Observer	August 1992	11-010	22/220	26/260	31/310
ENERGY					
Energy Statistics Handbook	August 1992	57-601	300	360	420
HOUSEHOLD SURVEYS					
The Labour Force	July 1992	71-001	17.90/179	21.50/215	25.10/251
INDUSTRY					
New Motor Vehicle Sales	October 1991	63-007	14.40/144	17.30/173	20.20/202
Oil Pipe Line Transport	May 1992	55-001	10/100	12/120	14/140
Oils and Fats	June 1992	32-006	5/50	6/60	7/70
Particleboard, Waferboard and Fibreboard	June 1992	36-003	5/50	6/60	7/70
Primary Iron and Steel	June 1992	41-001	5/50	6/60	7/70
INTERNATIONAL TRADE					
Preliminary Statement of Canadian International Trade	June 1992	65-001P	10/100	12/120	14/140
PRICES					
Consumer Price Index	July 1992	62-001	9.30/93	11.20/112	13/130
TRANSPORTATION					
Passenger Bus and Urban Transit Statistics	June 1992	53-003	7.10/71	8.50/85	9.90/99

NEW FROM STATISTICS CANADA



Canadian Economic Observer

The August issue of *Canadian Economic Observer*, Statistics Canada's flagship publication for economic statistics, is now available.

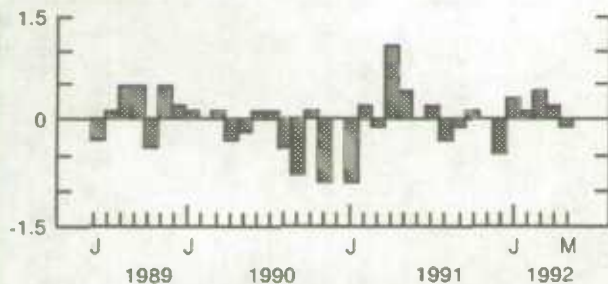
The August issue contains a monthly summary of the economy, major economic events in July and a feature article on characteristics of importing firms. A statistical summary contains a wide range of tables and graphs on the principal economic indicators for Canada, the provinces and the major industrial nations.

Canadian Economic Observer (catalogue number 11-010) can now be ordered from Publication Sales. For more information, call Philip Cross (613-951-9162), Current Analysis Section.

CURRENT TRENDS

Gross Domestic Product

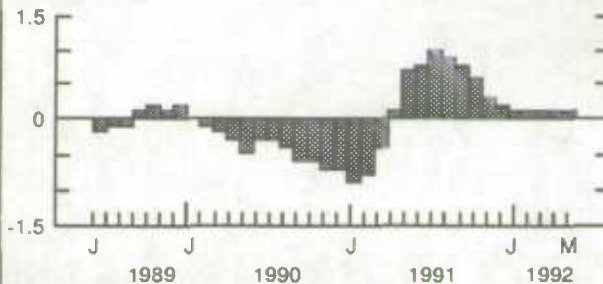
% change,
previous month



Real gross domestic product at factor cost declined 0.1% in May after four consecutive monthly gains.

Composite Leading Indicator

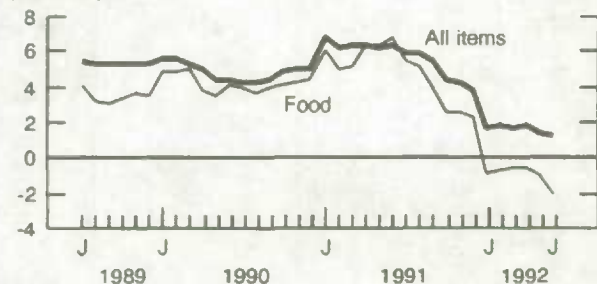
% change,
previous month



The composite leading indicator posted a fifth straight increase of 0.1% in May.

Consumer Price Index

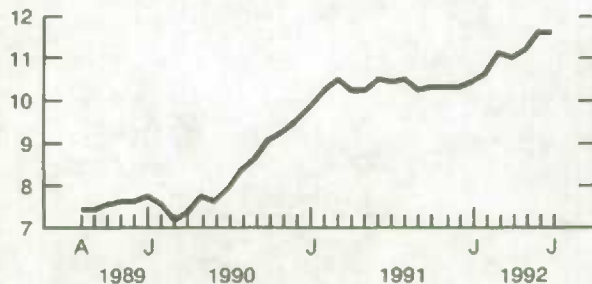
% change,
previous year



In June, the year-over-year increase in the all-items CPI stood at 1.1%, while the food index declined by 2.2%.

Unemployment Rate

%



The seasonally adjusted unemployment rate for July stayed at 11.6%, unchanged from June.

Manufacturing

Billions
of dollars



Canadian manufacturers' shipments increased 1.0% in June to \$23.3 billion. Unfilled orders fell by 0.3% to \$21.7 billion, an eighth consecutive decrease.

Merchandise Trade

Billions
of dollars



In June, exports fell for the first time in seven months, down 1.5% to a level of \$12.7 billion. Imports rose by 2.7% to \$12.3 billion.

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)	May	505.6	-0.1%	0.2%
Composite Leading Indicator (1981 = 100)	May	144.5	0.1%	5.2%
Operating Profits of Enterprises (\$ billion)	1st Quarter	10.4	5.1%	-11.9%
DOMESTIC DEMAND				
Retail Trade (\$ billion)	May	15.1	-0.7%	-1.1%
New Motor Vehicle Sales ('000 units)	June	97.3	-0.9%	-17.4%
LABOUR				
Employment (millions)	July	12.2	-0.2%	-1.2%
Unemployment Rate (%)	July	11.6	0.0	1.6
Participation Rate (%)	July	65.6	-0.2	-0.8
Labour Income (\$ billion)	May	32.4	0.4%	2.9%
Average Weekly Earnings (\$)	April	545.85	0.4%	3.2%
INTERNATIONAL TRADE				
Merchandise Exports (\$ billion)	June*	12.7	-1.5%	7.4%
Merchandise Imports (\$ billion)	June*	12.3	2.7%	8.1%
Merchandise Trade Balance (\$ billion)	June*	0.35	-0.52	-0.05
MANUFACTURING				
Shipments (\$ billion)	June*	23.3	1.0%	-0.8%
New Orders (\$ billion)	June*	23.3	2.6%	-0.4%
Unfilled Orders (\$ billion)	June*	21.7	-0.3%	-11.0%
Inventory/ Shipments Ratio	June*	1.46	-0.02	-0.07
Capacity Utilization (%)	1st Quarter	69.8	-0.5	-0.4
PRICES				
Consumer Price Index (1986 = 100)	June	128.1	0.2%	1.1%
Industrial Product Price Index (1986 = 100)	June	108.7	0.0%	0.2%
Raw Materials Price Index (1986 = 100)	June	108.5	2.2%	5.1%
New Housing Price Index (1986 = 100)	June	134.5	0.2%	0.1%

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

Published by the Communications Division Statistics Canada.

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R.H. Coats Building, Tunney's Pasture, Ottawa, Ontario
K1A 0T6.

Catalogue: 11-002E. Price: Canada: \$2.50 per issue, \$125.00 per year; United States: US\$3.00 per issue, US\$150.00 per year; Other Countries: US\$3.50 per issue, US\$175.00. Canadian customers please remember to add 7% GST. To subscribe: send money order or cheque payable to the Receiver General for Canada/Publication Sales, Statistics Canada, Ottawa, Ontario K1A 0T6. To order by telephone dial: 1-800-267-6677 within Canada or 613-951-7277 from all other countries.

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