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Friday, February 25, 1994

OVERVIEW

Canadians Step Up Their Purchases of Foreign Securities

In December, Canadian investors increased their purchases of foreign securities to a new high of \$3.2 billion, following the almost equally massive \$2.7 billion investment in November.

- Profits of Enterprises Rebound
 Seasonally adjusted operating profits of all
 Canadian enterprises climbed 11.4% in the
 fourth quarter of 1993 following a 10.2% drop in
 the third quarter.
- Number of UI Beneficiaries Still Declining

The seasonally adjusted number of beneficiaries who received regular unemployment insurance benefits fell 1.3% in December to 1.02 million persons.

- Retail Trade: Sales Up in December Seasonally adjusted retail sales rose 0.9% in December to \$16.4 billion following moderate increases since July.
- Sales by Wholesale Merchants Continue to Increase

Seasonally adjusted sales by wholesale merchants increased for the eighth straight month, rising by 1.8% in December to \$18.3 billion.

Merchandise Trade Activity
Buoyant in 1993

In 1993, Canada's trade balance increased by \$2.7 billion from 1992 to \$11.7 billion due to record-breaking merchandise exports.

Farm Cash Receipts Reach Record High

Farm cash receipts for 1993 totalled \$23.7 billion, an increase of 2.2% from 1992 and 6.9% above the previous five-year average of \$22.2 billion.

Canad and Step Up Their Purchases of Foreign Securities

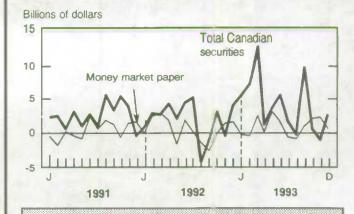
In December, the net purchase of foreign securities by Canadian investors climbed to a new high of \$3.2 billion, following an almost equally massive \$2.7 billion investment in November. This brought to \$12.8 billion the total net purchases for 1993, double the previous annual record of \$6.8 billion set in 1992.

Canadian residents – led by mutual funds – bought a net \$1.7 billion in foreign stocks, with a significant 90% directed to overseas stocks. The equally large \$1.5 billion net investment in foreign bonds went largely into U.S. treasury bonds. This contrasts sharply with November when 75% of the investment went into stocks.

As for the Canadian market, foreign investors resumed their purchases of Canadian securities, acquiring \$2.4 billion, which more than offset the net reduction of \$1.0 billion in November. Net buying for 1993, at \$48 billion, exceeded by far the total of \$22 billion for 1992.

(continued on page 2)

Net Transactions in Securities



... Canadians Step Up Their Purchases of Foreign Securities

The foreign net acquisition of \$1.1 billion of Canadian stocks in December brought total net purchases for 1993 to \$11.9 billion, almost double the previous record of \$6.6 billion set in 1987.

Following two months of net selling totalling \$6.0 billion, foreign investors increased their holdings of Canadian bonds by \$700 million. The purchases were solely new bond issues (\$1.7 billion) while non-residents continued to sell off existing bonds (\$1.0 billion) as they have generally been doing since April 1993.

Foreign investors bought a net \$600 million in money market paper. Although down sharply from the previous two months, the purchases represented the fourth consecutive monthly net investment. For the first time since July, the net investment was directed to paper other than Government of Canada treasury bills.

For further information, order Canada's International Transactions in Securities (catalogue number 67-002) or contact Balance of Payments Division at (613) 951-1864.

Profits of Enterprises Rebound

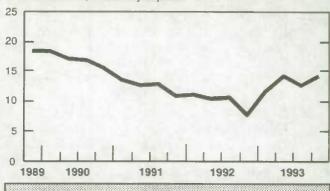
In the fourth quarter of 1993, seasonally adjusted operating profits of all Canadian enterprises climbed 11.4% following a 10.2% drop in the third quarter. Profits rose from \$12.5 billion in the third quarter to \$14.0 billion, almost double the low of \$7.5 billion registered in the fourth quarter of 1992. Annual operating profits for 1993 were \$51.8 billion compared to \$39.4 billion in 1992. This marked the first annual increase since 1988, when profits reached \$82.7 billion.

Operating profits of non-financial industries rebounded from a decline of 5.5% in the third quarter, rising 18.4% to \$11.3 billion. Increases in the first, second and fourth quarters raised profits in 1993 to their highest level since 1990. The resource based industries, including petroleum and natural gas, wood and paper and non-ferrous metals, led the fourth quarter profit recovery. Strong gains were also registered in motor vehicles and transportation services.

In contrast to the non-financial industries, the financial industries' profits slumped 11.3% to \$2.6 billion in the fourth quarter but were still well above the fourth quarter low of \$0.7 billion in 1992. Profits had averaged \$3.0 billion over the first three quarters of 1993.

Operating Profits

Billions of dollars, seasonally adjusted



Chartered banks posted the largest decline in the fourth quarter. They saw their operating profits decline to \$0.4 billion from \$0.8 billion in the third quarter. The profit decrease was attributable to higher provisions to cover future loan losses and restructuring costs.

For further information, order Quarterly Financial Statistics for Enterprises (catalogue number 61-008) or contact Industrial Organization and Finance Division at (613) 951-9843.

Number of UI Beneficiaries Still Declining

The seasonally adjusted number of beneficiaries receiving regular unemployment insurance benefits fell 1.3% in December to 1.02 million. The number of beneficiaries has been on a downward trend since November 1992 and the rate of decrease has accelerated since September 1993. The number of beneficiaries in December stood 12.1% below the level of a year ago (1.15 million).

The decline in the number of beneficiaries who received regular unemployment insurance benefits was broadly-based in December as nine provinces and the Northwest Territories posted large declines. In Québec, where beneficiaries account for 33% of Canada's total, the number fell for the fourth straight month. Ontario recorded a sixth straight monthly decline. In British Columbia, the number of beneficiaries decreased for the eleventh month in 1993.

(continued on page 3)

... Number of UI Beneficiaries Still Declining

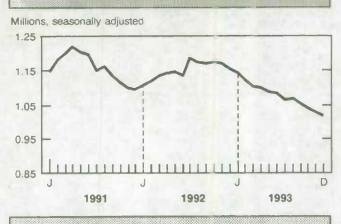
Regular benefit payments totalled \$1.2 billion in December, up 0.4% from November but 10.8% less than the amount paid a year earlier. In 1993, regular benefits, which represent four-fifths of total benefits paid in 1993, amounted to \$14.6 billion.

A total of 3.32 million applications for unemployment insurance benefits were filed in 1993, a decrease of 12.7% from 1992. For the year 1993, \$18.3 billion was paid in benefits, down 5.2%

U.I. Beneficiaries Receiving Regular Benefits, December 1993 Seasonally Adjusted

Province/ Territory	Total (000)	% change, previous month	% change, previous year
Canada	1,015	-1.3	-12.1
Newfoundland	57	-2.8	-12.7
Prince Edward Island	13	-0.2	-1.5
Nova Scotia	51	-1.7	-6.1
New Brunswick	55	-0.9	-1.7
Québec	337	-0.3	-9.9
Ontario	277	-0.7	-14.3
Manitoba	26	-3.2	-15.9
Saskatchewan	22	0.3	-13.9
Alberta	68	-2.5	-15.7
British Columbia	107	-2.4	-13.9
Yukon	2	0.1	19.9
Northwest Territories	1	-3.3	-27.2

U.I. Beneficiaries Receiving Regular Benefits



from 1992. This was the first decrease since 1987, when \$10.4 billion was paid to beneficiaries. A reduction in the benefit rate from 60% of insurable earnings to 57%, effective since April 4, 1993, was partly responsible for the decline in benefit payments.

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

Retail Trade: Sales Up in December

Seasonally adjusted retail sales were up by 0.9% in December to \$16.4 billion. Total retail sales rose 0.6% in the last quarter of 1993 compared to growth rates of 0.9% in the third quarter, 0.8% in the second quarter and 1.8% in the first quarter. While still pointing upwards, the retail sales trend has decelerated from what had been steady, modest growth since March 1992.

Nine of 16 trade groups recorded higher sales in December, led by the automotive sector where sales rose for the fourth straight month, this time by 2.0% to \$5.77 billion. This growth was attributable to a strong 4.3% rise in sales by motor vehicle and recreational vehicle dealers – also a fourth consecutive monthly increase. A 4.3% decline in gasoline service stations' sales had a dampening effect. The trend for the automotive sector has been rising steadily since January 1992.

Also contributing to the overall increase, general merchandise stores reported a 1.9% rise in sales, but their sales level was down 0.3% from a year earlier. Both components of the furniture

sector increased: sales by household furniture and appliance stores climbed 24% and sales by household furnishings stores rose 1.3%.

Partly offsetting these increases, sales by supermarkets and grocery stores, which account for almost one-quarter of total sales, fell 0.4%. Drugstore sales dropped 1.5%, but were still 7.8% above their year-earlier level.

Total 1993 retail sales amounted to \$193.8 billion, up 4.7% from 1992. This compares with a gain of 2.1% in 1992 and a decline of 1.8% in 1991 after removing federal sales tax from the 1990 data. All sectors posted sales increases in 1993, but the largest impact came from the automotive, food and drug sectors.

All provinces and territories except Newfoundland (-0.8%) reported sales increases in 1993. Gains ranged from 2.0% in the Yukon to 7.8% in British Columbia.

For further information, order Retail Trade (catalogue number 63-005), or contact Industry Division at (613) 951-9682.

(continued on page 4)

PROVINCIAL PERSPECTIVES

Retail and Wholesale Trade, December 1993 Seasonally Adjusted

	Retail	Retail Sales		Wholesale Sales		
	\$ millions	% change from previous month	\$ millions	% change from previous month		
Canada	16,450	0.9	18,322	1.8		
Newfoundland	279	0.6	177	2.3		
Prince Edward Island	71	-0.9	39	8.3		
Nova Scotia	537	-0.6	416	10.2		
New Brunswick	407	-2.9	239	2.7		
Québec	3,985	0.0	4,318	1.2		
Ontario	6,075	2.0	7,534	1.1		
Manitoba	550	-1.8	621	4.4		
Saskatchewan	497	2.1	607	10.9		
Alberta	1,742	0.5	1,783	2.7		
British Columbia	2,253	1.2	2,566	0.4		
Yukon	17	-0.5	23	-2.4		
Northwest Territories	37	2.6				

Sales by Wholesale Merchants Continue to Increase

Seasonally adjusted sales by wholesale merchants continued to increase for the eighth straight month, rising by 1.8% in December to \$18.3 billion. This increase pushed sales 11.6% above their December 1992 level.

Sales rose in seven of nine trade groups in December. Sales by suppliers of farm machinery, equipment and supplies climbed 20.9%. This was greatly influenced by the 1992-93 small business investment tax credit program on new equipment purchases (allowing Canadian farmers and small businesses a 10% writedown on their income tax) that ended in December.

Also recording higher sales were distributors of food, beverage, drug and tobacco products (1.8%) and wholesalers of other machinery, equipment and supplies (1.9%). This latter group was also affected by the investment tax credit program.

Lower sales were reported by suppliers of apparel and dry goods (-4.2%) and by distributors of household goods (-2.8%) – the second consecutive monthly decline for both of these trade groups.

For 1993, annual sales totalled \$205.0 billion, up 7.8% from 1992. All trade groups recorded higher annual sales.

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

Merchandise Trade Activity Buoyant in 1993

Merchandise exports reached a record \$181.0 billion in 1993, some 15.6% higher than in 1992. Stronger growth of merchandise exports pushed Canada's trade balance to \$11.7 billion, up from \$9.0 billion in 1992. Meanwhile, total imports amounted to \$169.3 billion, 14.7% above 1992.

In December, the seasonally adjusted value of merchandise exports grew by \$146 million to \$15.9 billion. Imports continued to set records, rising by \$330 million to \$15.3 billion. As a result, Canada's monthly trade surplus fell again, declining to \$524 million from November's level of \$708 million.

With imports from the United States up by \$331 million (to a record \$11.3 billion), and exports up by \$89 million (to \$12.9 billion), the trade surplus with the U.S. decreased slightly – from \$1.8 billion in November to \$1.6 billion in December.

Underlying Trends

The exports trend has been rising for two years and now stands 13.1% above its year-earlier level. Exports to the United States continued to provide most of the growth, rising by 17.2% over 1992. Except for energy products, the export trends for all major commodity groupings increased in November.

(continued on page 5)

... Merchandise Trade Activity Buoyant in 1993

For imports, the trend has been increasing for 23 months and now stands 16.7% higher than a year earlier. In 1993, the largest increases have been for imports from the United States (19.4%) and from non-OECD countries (16.3%). As with exports, the import trends rose in November for all major commodity groups except energy.

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 8.)

Farm Cash Receipts Reach Record High

Farm cash receipts totalled a record \$23.7 billion in 1993, an increase of 2.2% from 1992 and 6.9% above the previous five-year average of \$22.2 billion. Record livestock receipts and higher crop receipts offset a sharp decline in direct payments.

Seven of 10 provinces recorded gains in farm cash receipts, with Manitoba (8.6%) and New Brunswick (5.7%) reporting the largest. Cash receipts declined in Newfoundland (-0.7%), Nova Scotia (-0.6%) and Québec (-0.3%).

Livestock receipts were a record \$12.2 billion in 1993, up 8.3% from the previous high of \$11.2 billion in 1992. The increase was due to higher cattle, hog and chicken receipts.

Crop receipts rose to \$8.9 billion, a 7.5% increase from \$8.2 billion in 1992. Higher Canadian Wheat Board payments and record receipts for canola, soybeans and potatoes offset a decline in wheat receipts.

Direct program payments fell sharply, from \$3.7 billion in 1992 to \$2.7 billion in 1993. Other (ad hoc) payments fell to \$62 million from \$647 million in 1992 and tripartite payments were \$21 million compared with \$371 million a year earlier – when low market prices for hogs and slaughter cattle triggered payments. Net Income Stabilization Account payments dropped to \$130 million from \$338 million. Provincial stabilization payments fell 39% to \$263 million, as payments on corn and hogs were much lower in Québec. Crop insurance payments rose to \$763 million, reflecting the adverse growing and harvesting conditions that prevailed in 1992.

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

PUBLICATIONS RELEASED FROM FEBRUARY 18 TO 24 1994

Division/title of publication			Price: Issue/Subscription			
	Period	Catalogue Number	Canada (Cdn.\$)	United States	Othe Countrie	
				US\$		
BUSINESS AND LABOUR MARKET						
ANALYSIS						
Strategies for Success: A Profile of Growing						
Small and Medium-sized Enterprises (GSMEs) in Canada		61-523E	15	18	21	
CENSUS						
Profile of Urban and Rural Areas – Part B, Canada, Provinces and Territories	1991 Census	93-340	55	66	77	
EDUCATION, CULTURE AND TOURISM						
Education Statistics Bulletin: The	1991-1992					
Elementary-secondary Teaching Force Film and Video	Vol. 16, No. 2 1991-92	81-002 87-204	4.90/49	5.90/59 29	6.90/69	
HOUSEHOLD SURVEYS						
Labour Force Annual Averages	1993	71-220	39	47	55	
The Labour Force	January 1994	71-001	17.90/179	21.50/215	25.10/251	
INDUSTRY						
Canned and Frozen Fruits and Vegetables,						
Monthly	December 1993	32-011	5/50	6/60	7/70	
Construction Type Plywood	December 1993	35-001	5/50	6/60	7/70 7/70	
Electric Lamps (light bulbs and tubes)	January 1994	43-009	5/50	6/60 3.20/32	3.80/38	
Monthly Production of Soft Drinks Monthly Survey of Manufacturing	January 1994 December 1993	32-001 31-001	2.70/27 17.30/173	20.80/208	24.20/242	
Pack of Selected Processed Fruits (excl.	December 1993	31-001	17.30/173	20.80/200	24.20/242	
Apples)	1993	32-234	13	16	18	
Pack of Selected Processed Vegetables	1993	32-240	13	16	18	
Production and Disposition of Tobacco						
Products	January 1994	32-022	5/50	6/60	7/70	
Production and Stocks of Tea, Coffee	Quarter Ended	20.005	0.000	0.000	0.50,000	
and Cocoa	December 1993	32-025	6.75/27	8/32	9.50/38	
Production, Shipments and Stocks on Hand	December 1993	35-003	7.10/71	8.50/85	9.90/99	
of Sawmills in British Columbia Refined Petroleum Products	November 1993	45-004	18.20/182	21.80/218	25.50/255	
Shipments of Plastic Film and Bags	Quarter Ended	40-00-4	10.20/102	21.00/210	20,00/200	
Manufactured from Resin	December 1993	47-007	6.75/27	8/32	9.50/38	
INVESTMENT AND CAPITAL STOCK						
Building Permits	December 1993	64-001	22.10/221	26.50/265	30.90/309	
NATIONAL ACCOUNTS AND						
ENVIRONMENT						
National Balance Sheet Accounts	Annual Estimates					
a contract and a contract of the contract of t	1983-1992	13-214	35	42	49	
PRICES						
Industry Price Indexes	December 1993	62-011	18.20/182	21.80/218	25.50/255	
Farm Product Price Index	December 1993	62-003	7.10/71	8.50/85	9.90/99	
SERVICES, SCIENCE AND TECHNOLOGY						
Service Industries Service Bulletin,	1992					
Advance Information	Vol. 5, No. 3	63-015	7.20/43	8.65/52	10/60	
TRANSPORTATION						
Aviation Service Bulletin	Vol. 26, No. 2	51-004	9.30/93	11.20/112	13/130	
Surface and Marine Transport Service	** 1 40 ** 4	WO 000	0.40	11.0500	1015/105	
Bulletin	Vol. 10, No. 1	50-002	9.40/75	11.25/90	13.15/105	

NEW FROM STATISTICS CANADA



Canadian Economic Observer

The February issue of Canadian Economic Observer, Statistics Canada's flagship publication for economic statistics, presents a monthly summary of the economy, major economic events in January and two feature articles: "A Profile of Growing Small Firms" and "The Distribution of GDP by Sector."

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.

The February 1994 issue of Canadian Economic Observer (catalogue number 11-010, \$22/\$220) is now available.

For more information, call Cindy Bloskie at (613) 951-3634, Current Analysis Group.

Census Profiles CD-ROM

The Census 2A and 2B Profiles are now available on CD-ROM. The profiles are based on data collected in the 1991 Census. They contain hundreds of cultural, demographic, housing, family and economic statistics on a single disc.

The data are available for a wide range of geographic areas such as: Canada as a whole, federal electoral districts, census divisions and subdivisions, census agglomerations, urban forward sortations areas, and individual enumeration areas.

The CD-ROM includes reference materials such as the Geography Information File and the 1991 Census Dictionary.

To purchase the 1991 Census Profiles CD-ROM or for more information, contact your nearest Statistics Canada Regional Reference Centre.



Strategies for Success: A Profile of Growing Small and Medium-sized Enterprises in Canada

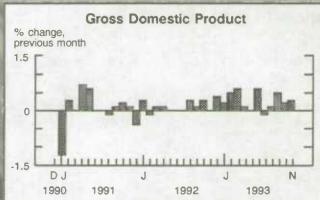
This new publication summarizes the results of a 1992 survey of small and medium-sized businesses in Canada. The special survey profiles a group of firms that grew rapidly in the late 1980s. It focuses on their activities, business strategies and characteristics.

The study summarizes the factors that were perceived by small growing firms as important to their growth. It examines strategies in which they feel they outpace their competitors. It investigates the importance attributed to new marketing, technology, input-sourcing, human-resource and management strategies. Finally, it profiles training, research and development, innovative, and export activities.

Strategies for Success (catalogue number 61-523E, \$15), a unique compendium on the characteristics of successful small firms, is now available.

For more information, contact John Baldwin at (613) 951-8588, fax: (613) 951-5643, Business and Labour Market Analysis Division.

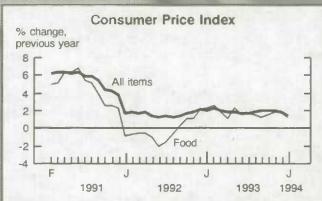
CURRENT TRENDS



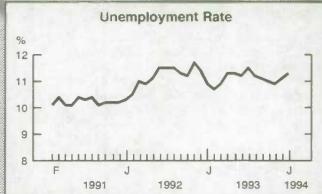
Economic growth continued in November: real gross domestic product at factor cost rose 0.3% after gains of 0.5% in September and 0.2% in October.



The growth of the leading indicator continued in January, increasing by 0.8% for the second consecutive month.



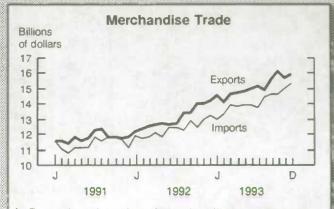
In January, the year-over-year increase in the all-items CPI was 1.3%. The food index rose by 1.2%.



The unemployment rate advanced 0.2 points in January to 11.4%.



Canadian manufacturers' shipments fell 0.1% in December to \$26.4 billion. The level of unfilled orders rose 6.4% to \$25.2 billion, the highest level since April 1991.



In December, the value of merchandise exports grew by 0.9% to \$15.9 billion, while imports continued to set records, climbing by 2.2% to \$15.3 billion.

LATEST MO	MILLE SI	AIISIIC		
	Period	Level	Change Previous Period	Change Previous Year
GENERAL				
Gross Domestic Product (\$ billion, 1986)	November	523.4	0.3%	3.4%
Composite Leading Indicator (1981 = 100)	January	161.0	0.8%	8.2%
Operating Profits of Enterprises (\$ billion)	4th Quarter*	14.0	11.4%	86.6%
DOMESTIC DEMAND	A series			
Retail Trade (\$ billion)	December*	16.4	0.9%	4.5%
New Motor Vehicle Sales ('000 units)	December	106.0	2.5%	-1.8%
LABOUR		2 1 100		
Employment (millions)	January	12.4	0.3%	0.9%
Unemployment Rate (%)	January	11.4	0.2	0.3
Participation Rate (%)	January	65.0	-0.1	-0.2
Labour Income (\$ billion)	November	33.4	0.2%	2.3%
Average Weekly Earnings (\$)	November	560.27	-0.3%	1.0%
INTERNATIONAL TRADE				
Merchandise Exports (\$ billion)	December	15.9	0.9%	11.7%
Merchandise Imports (\$ billion)	December	15.3	2.2%	15.8%
Merchandise Trade Balance (\$ billion)	December	0.52	-0.18	-0.44
MANUFACTURING				
Shipments (\$ billion)	December	26.4	-0.1%	7.0%
New Orders (\$ billion)	December	27.9	6.2%	12.1%
Unfilled Orders (\$ billion)	December	25.2	6.4%	13.1%
Inventory/ Shipments Ratio	December	1.33	-0.01	-0.07
Capacity Utilization (%)	3rd Quarter	78.6	0.2	3.1
PRICES				
Consumer Price Index (1986=100)	January	131.3	0.0%	1.3%
Industrial Product Price Index (1986=100)	December	114.5	0.5%	3.2%
Raw Materials Price Index (1986 = 100)	December	107.6	-2.2%	-1.3%
New Housing Price Index (1986=100)	December	136.2	-0.1%	1.1%

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

* New this week.



Monday	Tuesday	Wednesday	Thursday	Friday
	1 Financial Flow Accounts, OctDec., 1998 Balance of International Payments, OctDec., 1993 Real Gross Domestic Product By Industry at Factor Cost, December 1998 Income and Expenditure Accounts, OctDec., 1998	Crude Oil and Natural Gas, December 1993	Industrial Capacity Utilization Rates, Oct Dec., 1993	4
7	Estimates of Labour Income, December 1993 Short-term Expectations Survey	9	Farm Product Price Index, January New Motor Vehicle Sales, January Help-wanted Index, February	11 Labour Force Survey, February New Housing Price Index, January Travel Between Canada and Other Countries, January Department Store Sales by Province and Metropolitan Area, January
14	Building Permits, January	Monthly Survey of Manufacturing, January	Canadian Composite Leading Indicator, February Consumer Price Index (CPI), February	Department Store Sales Advance Release, February Sales of Natural Gas, January
21 Retail Trade, January	Canadian International Trade, January Wholesale Trade, January	23	Canada's International Transactions in Securities, January	Aboriginal Peoples Survey: Housing and Disability, 1991
Sales of Refined Petroleum Products, February	Industrial Product Price Index and Raw Materials Price Index, February	30 Employment, Earnings and Hours, January Unemployment Insurance Statistics, January Crode Oil and Natural Gas, January	Real Gross Domestic Product By Industry at Factor Cost, January	

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

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

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