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Infomat

A Weekly Review

Friday, October 19, 2001

OVERVIEW

Trucks stimulate sales of new motor vehicles

New truck sales were largely responsible for a 1.9% increase in the number of motor vehicles sold in August. New passenger car sales increased for the sixth consecutive month, reflecting their re-emerging popularity.

Consumers continue to spend at retail stores

Consumer spending increased 6.4% at retail stores in the second quarter of 2001 compared with the same period of 2000. The largest gains were in the automotive fuels, oils and additives group, followed by health and personal care products.

Tourism spending growth weakest in nearly five years

Tourism spending in Canada reached $13.7 billion in the second quarter, up 3.9% from the second quarter of 2000. In fact, tourism spending growth was the slowest in almost five years.

Growth of services industries slows for third consecutive quarter

Gross domestic product (GDP) for the services industries increased 0.4% in real terms in the second quarter. This was the slowest quarterly growth rate in five years, and the third straight quarter in which services output growth has decelerated.

Crop yields significantly lower

Drought conditions throughout most of Canada during the summer have significantly reduced crop yields in 2001. Grain producers face lowered production along with lacklustre export demand and depressed commodity prices.

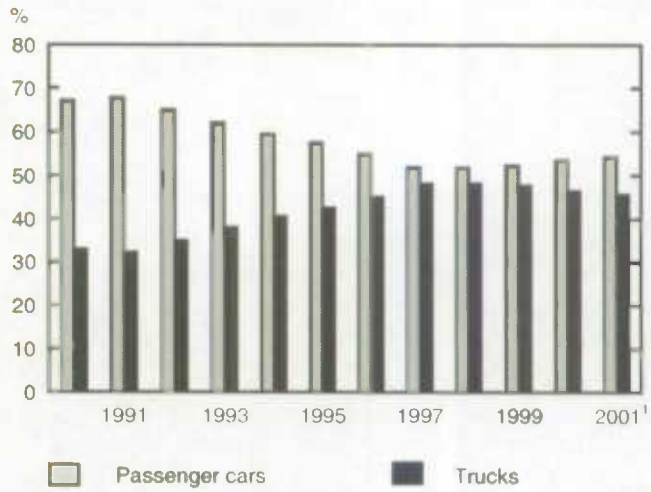
Trucks stimulate sales of new motor vehicles

The number of new motor vehicles sold in Canada increased 1.9% in August. Dealers sold 135,829 new vehicles in August, up 2,539 units from July. New motor vehicle sales maintained the upward movement that began at the start of 2001, partly owing to incentives that manufacturers offered to sell their 2001 models. New motor vehicle sales in August were the highest since September 2000, which was the strongest month in that year.

Truck sales were 3.3% higher in August, accounting for more than three-quarters of August's increase. This was the second-largest increase this year, exceeded only by April's 5.6% gain. In all, 61,629 trucks rolled out of dealer showrooms in August, 1,979 more than in July, when sales fell 1.2%. Truck sales have generally maintained an upward movement since the start of 2001.

The number of new passenger cars sold rose for a sixth consecutive month, surpassing July sales by 0.8%. A total of 74,200 new cars were purchased in August, the fourth highest monthly sales

Market share of cars and trucks



[1] *Cumulative for the first eight months.*

(continued on page 2)

... Trucks stimulate sales of new motor vehicles

performance in the past 10 years. Sales of overseas-built cars advanced 2.8%, while sales of North American-built cars were unchanged.

New passenger cars have been regaining favour with consumers after losing ground to trucks during most of the 1990s. In 1990, twice as many cars as trucks were sold; cars accounted for 67% of all new motor vehicle sales, compared with 33% for trucks. The gap subsequently narrowed so that, by 1998, cars accounted for only slightly more than 52% of all motor vehicles sold. The trend has since reversed, with a widening gap in favour of cars. The re-emerging popularity of cars might in part be explained by economic considerations. With gasoline prices starting to rise in early 1999, buyers appear to prefer vehicles that use less fuel.

The number of new vehicles sold advanced in all provinces in August compared with July. Newfoundland (+5.9%) and Saskatchewan (+5.9%) posted the largest gains. For both provinces, the increase followed a decline in sales in July. New motor vehicle sales in both provinces began an upward movement at the start of 2001. Prince Edward Island (+4.8%), Quebec (+4.6%) and Manitoba (+2.2%) also reported monthly increases above the national average.

The August 2001 issue of ***New motor vehicle sales*** *(Internet: 63-007-XIB, $13/$124) is now available. To order data or for general information, contact Client Services (1-877-421-3067; 613-951-3549; retailinfo@statcan.ca). For analytical information, contact Clérance Kimanyi (613-951-6363; clerance.kimanyi@statcan.ca), Distributive Trades Division.*

Consumers continue to spend at retail stores

Shoppers spent $76.2 billion at retail stores from April through June, up 6.4% from the second quarter of 2000. Sales were up in all major commodity groupings. The largest gains were in the automotive fuels, oils and additives group, followed by health and personal care products. Food and beverages posted the smallest increase (+3.8%).

Motor vehicles, parts and services accounted for 32% ($24.1 billion) of total spending. This 6.1% advance over the second quarter of 2000 followed two consecutive quarters of marginal year-over-year sales rises. The largest sales gains were for used vehicles (+9.2%) and automotive parts and accessories (+8.1%).

Consumers spent almost $6.0 billion on automotive fuels, oils and additives during the second quarter, up 11.5% from the same quarter of 2000. This group accounted for almost 8% of total spending in retail stores, up from 7.5% in the second quarter of 2000. Year-over-year sales in this group have risen in every quarter since the second quarter of 1999 because of higher pump prices for gasoline.

Spending on health and personal care products rose 9.8% in the second quarter to $5.1 billion, as a result of increased sales in all sub-categories. For the third consecutive quarter, prescription and non-prescription eyewear (+12.7%) and prescription drugs (+11.8%) posted the largest year-over-year sales gains.

Shoppers spent just over $6.5 billion on clothing, footwear and accessories in the second quarter, up 6.1%. Within this category, jewellery and watch sales were up 10.9%, followed by clothing (+6.0%), footwear (+5.3%) and luggage and leather goods (+0.4%). The largest increase in the clothing category was for children's and infants' clothing (+8.1%). Consumers are displaying a growing preference for buying these items at specialty stores.

Shoppers spent $5.1 billion on home furnishings and electronics in the second quarter, up 4.9%. Sales of telephones and home office electronics (excluding computers) jumped 27.3%. Within the all other goods and services category, sales of sporting goods advanced 11.2%. All sporting goods categories were up, except for ski equipment. Consumers spent significantly more on exercise and fitness equipment (+29.7%), bicycles (+16.8%) and golf equipment (+13.4%).

Data by an expanded list of trade groups are now available. For more information, contact Client Services (1-877-421-3067; 613-951-3549; retailinfo@statcan.ca). For analytical information, contact Leslie Kiss (613-951-3556), Distributive Trades Division.

Retail sales, all stores
Not seasonally adjusted

	Second quarter 2000	First quarter 2001	Second quarter 2001	Second quarter 2000 to second quarter 2001
	$ millions			% change
All commodities	**71,632**	**61,790**	**76,203**	**6.4**
Food and beverages	15,420	14,411	15,999	3.8
Health and personal care products	4,668	4,854	5,123	9.8
Clothing, footwear and accessories	6,138	4,945	6,512	6.1
Home furnishings and electronics	4,830	4,730	5,067	4.9
Motor vehicles, parts and services	22,696	17,869	24,090	6.1
Automotive fuels, oils and additives	5,375	5,267	5,996	11.5
All other goods and services	12,505	9,714	13,415	7.3

Tourism spending growth weakest in nearly five years

Tourism spending in Canada reached $13.7 billion in the second quarter, up 3.9% from the second quarter of 2000. This growth was much slower than in the first quarter of 2001 (+6.0%) and in 2000 as a whole (+7.9%). In fact, it was the slowest in almost five years. Weaker spending by Canadians, especially on air transportation, was the main contributing factor. (Unless otherwise noted, data are not adjusted for seasonal variations and are expressed in current prices.)

The main source of growth during the April-to-June period was spending by visitors from other countries, which expanded to $4.6 billion, a growth rate of 6.5% compared with the second quarter of 2000. Tourism spending by visitors grew twice as much as tourism spending by Canadians within the country (+2.7%). Strong increases were spread across all major categories.

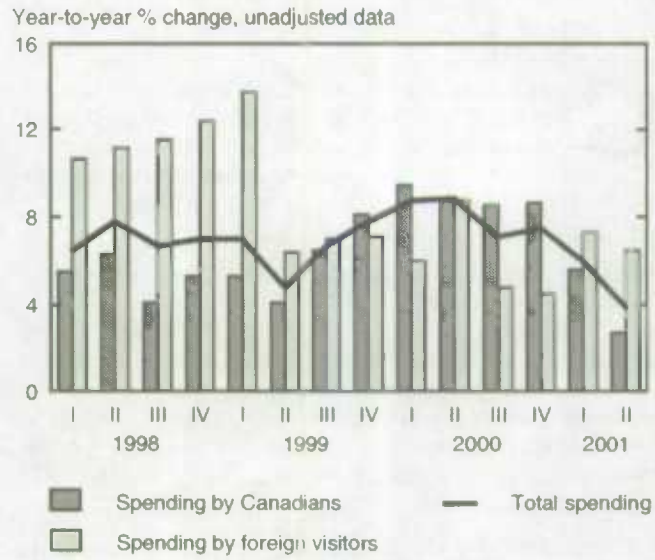
A strong rise in the number of travellers from the United States contributed to the strength in total spending by non-residents. Overnight travel was up 5.4% from the second quarter of 2000, and the number of same-day trips rose 3.1%, for a combined increase of 3.9%. However, the number of visitors from countries other than the United States fell 4.3%, the first significant decline in almost three years.

Tourism spending in Canada
Not seasonally adjusted

	Second quarter 2000	Second quarter 2001	Second quarter 2000 to second quarter 2001
	$ billions at current prices		% change
Total tourism spending	**13.2**	**13.7**	**3.9**
Foreigners	4.3	4.6	6.5
Canadians	8.8	9.1	2.7
Transportation	5.4	5.5	3.0
Foreigners	1.1	1.2	4.8
Canadians	4.2	4.4	2.5
Accommodation	1.9	2.0	3.6
Foreigners	1.0	1.1	5.4
Canadians	0.9	0.9	1.6
Food and beverage services	2.2	2.3	5.2
Foreigners	1.0	1.0	7.6
Canadians	1.2	1.2	3.3
Other tourism commodities	1.3	1.4	4.5
Foreigners	0.4	0.4	7.1
Canadians	0.9	0.9	3.3
Other commodities	2.4	2.5	4.8
Foreigners	0.8	0.9	8.5
Canadians	1.6	1.6	2.9

Note: *Totals may not add due to rounding.*

Tourism spending in Canada



Spending by Canadians at home rose 2.7% from the second quarter of 2000 to $9.1 billion. This was the lowest yearly increase since the fourth quarter of 1996. Current slower economic growth in the country may have contributed to this situation. All major categories of spending showed signs of weakness. Expenditures on passenger air transportation posted one of the lowest yearly advances (+0.4%). Tourism by Canadians made up two-thirds of total tourism outlays in Canada.

At the same time, Canadians made fewer trips to the United States. Canadians made 10.4 million trips during the second quarter, down 4.7% from the second quarter of 2000. Continued weakness in the Canadian dollar against its U.S. counterpart was probably a factor. However, the number of trips to countries other than the United States rose 8.2%.

After adjusting for seasonality and inflation, tourism spending in Canada declined 0.9% (annual rate) in the second quarter compared with the first quarter. This marks the second consecutive quarterly decrease, following a slight drop (-0.3%) in the first quarter. Transportation was one of the components most affected (-1.6%).

The second quarter 2001 issue of ***National tourism indicators*** *(13-009-XIB, free) can be downloaded from Statistics Canada's Web site (www.statcan.ca). From the* Our products and services *page, choose* Free publications, *then* National accounts. *To order a paper copy of the publication (13-009-XPB, free), contact the client services officer (613-951-3640; fax: 613-951-3618; iead-info-dcrd@statcan.ca). For analytical information, contact Jacques Delisle (613-951-3796) or James Temple (613-951-0269), Income and Expenditure Accounts Division.*

Growth of services industries slows for third consecutive quarter

Gross domestic product (GDP) for the services industries increased 0.4% in real terms in the second quarter, the slowest quarterly growth rate in five years. This was the third straight quarter in which services output growth has decelerated. In comparison, goods output advanced 0.1% after having declined for two straight quarters.

Output fell in several services industries: wholesale trade (-0.6%); architectural and other scientific services (-0.6%); and transportation and storage services (-0.5%). Output in advertising services dropped 0.5% as firms trimmed spending on advertising. Offsetting these declines were increases in the insurance and real estate agents industry category (+3.9%) and in communications services (+1.7%). Retail trade output rose 1.1%, and strong growth also occurred in the finance and insurance industries (+0.9%) and in government services (+0.9%).

Personal expenditures on services rose 0.8% during the second quarter, the lowest quarterly growth rate in five years. With the Consumer Price Index for services rising 0.9%, the increase in spending was due more to higher services prices than to higher consumer demand. Consumer spending on services rose most rapidly for communications services (+3.1%), financial and legal services (+1.6%) and accident and sickness insurance (+1.5%). Consumer spending on purchased transportation declined 2.1%, largely due to the public transit strike in Vancouver.

Also contributing to the quarterly slowdown was a 0.3% decline in Canada's services exports, mainly the result of a significant decline in exports of travel services. However, Canada's trade deficit in services shrank from $1.85 billion to $1.62 billion due to a 1.8% decrease in imports of services. This decline occurred because Canada's receipts from abroad for travel and transportation services fell $278 million.

Key services indicators, second quarter 2001

	Growth since first quarter 2001	Growth since second quarter 2000
	%	
Gross domestic product (real)	0.4	3.1
Consumer spending	0.8	4.6
Prices	0.9	2.5
Exports	-0.3	2.1
Imports	-1.8	0.6
Employment	2.2	1.9

In the second quarter, the services industries created 238,600 jobs. Second-quarter increases of this magnitude are not unusual given the seasonal nature of many services industries. All of the added services jobs were full-time positions. As a result, the proportion of the services work force employed full-time rose from 76% to nearly 78%.

On a year-over-year basis, output in services rose 3.1% in real terms compared with the second quarter of 2000, despite slowing growth in recent quarters. In contrast, output in goods declined 0.8%.

The second quarter 2001 edition of ***Services indicators*** *(Internet: 63-016-XIB, $26/$87; paper: 63-016-XPB, $35/$116) is now available. For more information, contact Don Little (613-951-6739; littdon@statcan.ca), Services Industries Division.*

Crop yields significantly lower

Drought conditions throughout most of Canada during July and August have significantly reduced yields on all crops in 2001 compared with 2000. Grain producers, already struggling with lacklustre export demand and depressed commodity prices, face the additional burden of a low production year.

Feed grain production and supply has been tight in 2001, forcing the feed and livestock industries to use substitutes and draw grain supplies from greater distances. The lower overall production of all grains will create a challenging environment for grain companies this year, as they struggle to maintain throughput volumes and market share.

Low barley production will do little to rebuild the tight stock situation now facing the feed, livestock, and malting industries in Western Canada. Barley production is expected to decline 18% to 11.1 million metric tonnes. Seeded acreage was 12.4 million acres, down 1% from 2000. The average yield dropped to 47.2 bushels per acre. Lower yields in Saskatchewan accounted for most of the reduction.

September's production estimates of principal field crops

	2000	2001	2000 to 2001
	Millions of tonnes		% change
Total wheat	26.8	20.7	-23
Spring wheat	19.4	16.2	-16
Durum wheat	5.6	2.9	-48
Barley	13.5	11.1	-18
Grain corn[1]	6.5	7.6	17
Canola	7.1	4.8	-32
Oats	3.4	2.8	-18
Field peas	2.9	2.2	-24
Soybeans[1]	2.7	2.0	-26
Flaxseed	0.7	0.7	0
Rye	0.3	0.2	-33

1. Quebec and Ontario only.

(continued on page 5)

... Crop yields significantly lower

Production of canola is estimated at 4.8 million tonnes, down 32% from 2000. Most of the drop was a result of a decrease in seeded acreage, which was down 18% to 9.9 million acres because of dry conditions, large inventories, and lacklustre demand from export markets as well as domestic crushers. The average yield declined as well, to 22.3 bushels per acre.

Total wheat production, including durum, is estimated at 20.7 million tonnes, down 23% from 2000, and the lowest since the drought of 1988. Seeded acreage expanded 4% to 28.5 million acres, but the average yield contracted 23% to 28.0 bushels per acre. Production of red spring wheat was 13.7 million tonnes, down 16% from 2000, despite a 12% increase in seeded acreage. The average yield was also reduced. Saskatchewan accounted for nearly 1.3 million tonnes of the loss in red spring wheat production. Alberta production of this crop fell nearly 900,000 tonnes.

Soybean production is expected to decline 26% to 2.0 million tonnes. Soybeans were the hardest hit in Ontario, where dry conditions caused yields to fall 25% to 28.6 bushels per acre. Field pea production dropped to 2.2 million tonnes. Another record production year had originally been predicted for field peas, since the seeded acreage was a record 3.6 million acres.

Corn production for grain rose 17% to 7.6 million tonnes as a result of an increase in seeded acreage. At just under 100.0 bushels per acre, yields were essentially unchanged from the cold and wet season experienced in 2000. Ontario corn yields, with a disappointing 96.9 bushels per acre, brought down the national average. The average yield in Quebec was 104.5 bushels per acre.

***Field crop reporting series: September estimates of production of principal field crops, Canada**, Vol. 80, no. 7 (Internet: 22-002-XIB, $11/$66; paper: 22-002-XPB, $15/$88) is now available. For more information, contact David Burroughs (613-951-5138; dave.burroughs@statcan.ca), or Brent Wilson (613-951-0218; brent.wilson@statcan.ca), Agriculture Division.*

New from Statistics Canada

Tourism statistical digest
2001 edition

The 2001 edition of the *Tourism statistical digest* assembles all the survey results relevant to tourism and travel by Canadians and foreign visitors to Canada. Tables and charts illustrate world tourism trends, the demand and supply of tourism services in Canada, and the impact of tourism in the Canadian economy in 1999. Data from sources other than Statistics Canada, notably the World Tourism Organization, are also provided.

The 2001 edition of the ***Tourism statistical digest*** *(paper: 87-403-XPE, $45) is now available. For more information, contact Danielle Shaienks (613-951-5095; fax: 613-951-2909; shaidan@statcan.ca, Culture, Tourism and the Centre for Education Statistics.*

Travel-log
Autumn 2001

The Autumn 2001 issue of *Travel-log*, Statistics Canada's quarterly tourism newsletter, features the article, "International tourist travel to Canada—before and after the Asian Crisis." Each quarter, *Travel-log* also examines the Travel Price Index, the latest travel indicators, travellers' characteristics and the international travel account.

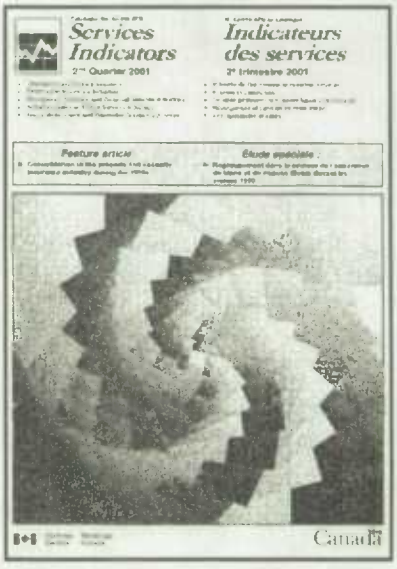
The Autumn 2001 issue of ***Travel-log****, Vol. 20, no. 4 (Internet: 87-003-XIE, $5/$16; paper: 87-003-XPB, $13/$42) is now available. For more information, contact Monique Beyrouti (613-951-1673, fax: 613-951-2909, beyrmon@statcan.ca), Culture, Tourism and the Centre for Education Statistics.*

Services indicators
Second quarter 2001

Services indicators is a quarterly publication that profiles the services industries. Each edition carries updated tables and charts based on output, finances, employment and remuneration data for various services industries over the most recent eight quarters.

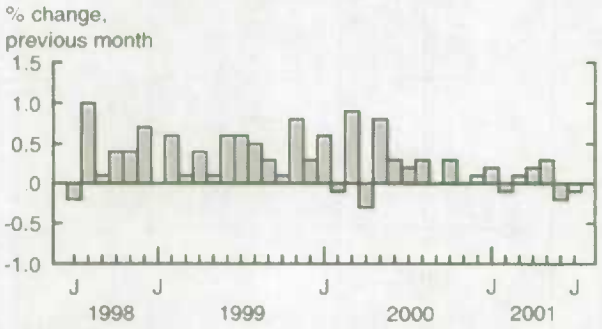
This issue includes the feature article, "Consolidation in the property and casualty insurance industry during the 1990s," which describes the industry's role and importance to the overall economy, and examines consolidation in the industry since 1988.

The second quarter 2001 issue of ***Services indicators*** *(Internet: 63-016-XIB, $26/$87; paper: 63-016-XPB, $35/$116) is now available. For more information, contact Don Little (613-951-6739; littdon@statcan.ca), Services Industries Division.*



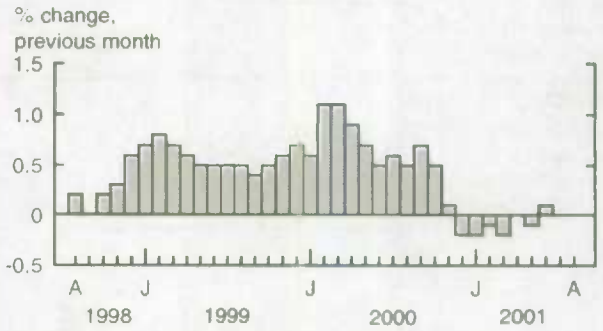
Current trends

Gross domestic product



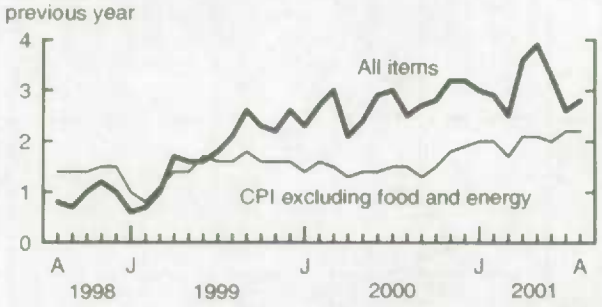
Total economic activity declined 0.1% in July, after a 0.2% reduction in June.

Composite Index



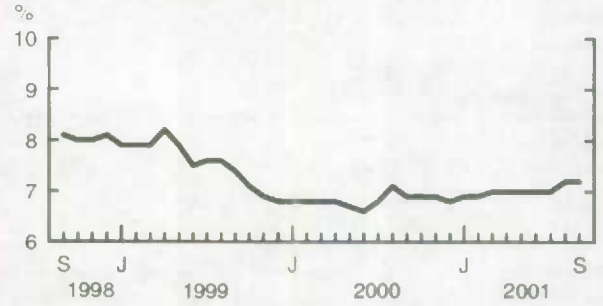
The leading indicator was unchanged (0.0%) in August, pulled down by further weakness in the business sector.

Consumer Price Index



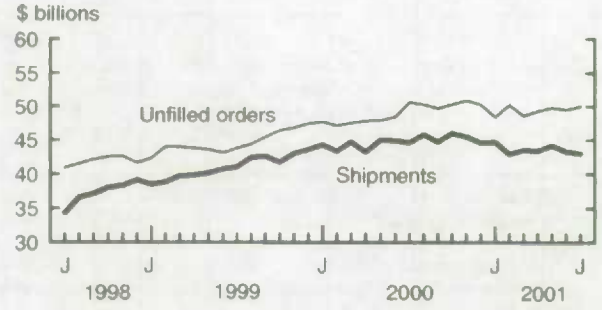
Consumer prices for goods and services were 2.8% higher in August than they were a year earlier. Excluding food and energy, prices rose 2.2%, unchanged from July.

Unemployment rate



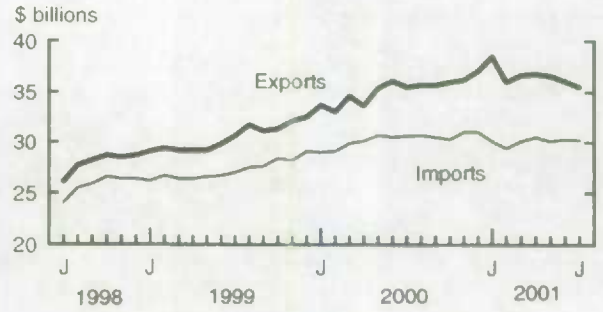
In September, the unemployment rate was unchanged at 7.2%.

Manufacturing



Manufacturers' shipments declined 0.2% in July to $43.0 billion. The backlog of unfilled orders posted a 1.2% increase to $50.0 billion.

Merchandise trade



In July, the value of merchandise exports declined 0.4% to $35.5 billion. Imports were unchanged at $30.2 billion.

Note: *All series are seasonally adjusted except the Consumer Price Index.*

Latest statistics

	Period	Level	Change, previous period	Change, previous year
GENERAL				
Gross domestic product ($ billions, 1997)	July	937.4	-0.1%	0.4%
Composite Index (1992=100)	August	166.1	0.0%	0.5%
Operating profits of enterprises ($ billions)	Q2 2001	44.7	0.6%	-11.3%
Capacity utilization rate (%)	Q2 2001	83.2	-0.4†	-2.6†
DOMESTIC DEMAND				
Retail trade ($ billions)	July	24.1	-0.5%	3.4%
Department store sales ($ billions)	August	1.68	-2.9%	9.9%
New motor vehicle sales (thousands of units)	August*	135.8	1.9%	-1.9%
Wholesale trade ($ billions)	July	32.9	-0.4%	1.5%
LABOUR				
Employment (millions)	September	15.1	0.1%	0.9%
Unemployment rate (%)	September	7.2	0.0†	0.3†
Participation rate (%)	September	65.8	-0.1†	-0.2†
Average weekly earnings ($)	July	665.41	0.5%	1.6%
Help-wanted Index (1996=100)	September	148	-3.3%	-16.4%
INTERNATIONAL TRADE				
Merchandise exports ($ billions)	July	35.5	-0.4%	0.2%
Merchandise imports ($ billions)	July	30.2	0.0%	-1.3%
Merchandise trade balance (all figures in $ billions)	July	5.4	-0.1	0.5
MANUFACTURING				
Shipments ($ billions)	August*	43.2	0.7%	-5.6%
New orders ($ billions)	August*	43.0	-0.6%	-5.5%
Unfilled orders ($ billions)	August*	49.3	-0.5%	-1.9%
Inventory/shipments ratio	August*	1.50	-0.01	0.11
PRICES				
Consumer Price Index (1992=100)	September*	117.4	0.3%	2.6%
Industrial Product Price Index (1992=100)	August	128.8	0.0%	0.9%
Raw Materials Price Index (1992=100)	August	138.8	-0.3%	-4.5%
New Housing Price Index (1992=100)	August	106.5	0.2%	2.9%

Note: *All series are seasonally adjusted with the exception of the price indexes.*
* *new this week*
† *percentage point*

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Editor: Lahouaria Yssaad; (613) 951-0627; lahouaria.yssaad@statcan.ca.
Head of Official Release: Madeleine Simard; (613) 951-1088; madeleine.simard@statcan.ca.

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The first (official) release of all statistical information produced by Statistics Canada occurs in *The Daily* (www.statcan.ca), available at 8:30 a.m. *The Daily* presents highlights from new data releases, along with sources, links and contacts for further information. It also contains schedules of upcoming major news releases and announces the Agency's new products and services.

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Products released from October 11 to 17, 2001

SUBJECT AREA Title of product	Period	Catalogue number	Price ($) (issue/subscription)
AGRICULTURE			
Cereals and oilseeds review	July 2001	22-007-XIB	11/112
Cereals and oilseeds review	July 2001	22-007-XPB	15/149
Vista on the agri-food industry and the farm community	September 2001	21-004-XIE	free
CULTURE, TOURISM AND THE CENTRE FOR EDUCATION STATISTICS			
Tourism statistical digest	2001 edition	87-403-XIE	36
Tourism statistical digest	2001 edition	87-403-XPE	45
Travel-log, Vol. 20, no. 4	Autumn 2001	87-003-XIE	5/16
Travel-log, Vol. 20, no. 4	Autumn 2001	87-003-XPB	13/42
DISTRIBUTIVE TRADES			
New motor vehicle sales	August 2001	63-007-XIB	13/124
INCOME STATISTICS			
Methodology of the Survey of Household Spending	1999	62F0026MIE01003	free
Survey of Household Spending data quality indicators	1998	62F0026MIE01001	free
Survey of Household Spending data quality indicators	1999	62F0026MIE01002	free
Survey of Labour and Income Dynamics–cross-sectional public-use microdata file	1996 and 1997	75M0010XCB	2,000
INDUSTRY MEASURES AND ANALYSIS			
Gross domestic product by industry	July 2001	15-001-XIE	11/110
MANUFACTURING, CONSTRUCTION AND ENERGY			
Metal mines	1999	26-223-XIB	free
Non-metallic mineral mining and quarrying	1999	26-226-XIB	free
Oils and fats	August 2001	32-006-XIB	5/47
Pipeline transportation of crude oil and refined petroleum products	June 2001	55-001-XIB	9/86
Production and disposition of tobacco products	August 2001	32-022-XIB	5/47
Production and shipments of steel pipe and tubing	August 2001	41-011-XIB	5/47
Steel wire and specified wire products	August 2001	41-006-XIB	5/47
Supply and disposition of crude oil and natural gas	June 2001	26-006-XPB	19/186
PRICES			
Consumer Price Index	September 2001	62-001-XIB	8/77
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