



Infommat

A Weekly Review

Friday, January 9, 1998

OVERVIEW

◆ Imports grow, exports slip

While imports grew in October, exports slipped. Between January and October, the merchandise trade balance remained well below the record-setting levels posted in 1996.

◆ Consumer prices rise

The prices of the goods and services that make up the Consumer Price Index rose in November compared with the same month of the previous year. On a monthly basis, however, prices decreased slightly.

◆ Another increase in retail sales

For the fourth consecutive month, retailers registered an increase in sales in October. Rising sales by motor vehicle dealers pushed sales ahead.

◆ Wholesale trade continues to move ahead

Wholesale sales were strong as the last quarter of 1997 opened, continuing the upward movement that began in January 1996.

◆ Growth in shipments resumes

Gains by smaller manufacturers in the automotive sector pushed total manufacturing shipments up in October, following decreases in August and September.

◆ Growth of leading indicator eases again

Between October and November, growth of the Composite Index eased again. The slowdown was largely confined to the natural resource sector and the stock market.

◆ How are firms preparing for the year 2000?

According to a survey conducted in the fall of 1997, less than half of firms have taken action to prepare for anticipated computer problems when the calendar hits January 1, 2000.

Imports grow, exports slip

In October, exports declined 0.6% to \$25.1 billion, while imports rose 2.7% to a record \$24.5 billion. Between January and October, imports grew at a much faster rate than exports. The balance of merchandise trade remained well below the record-setting levels seen in 1996, and by October it had fallen to \$581 million—its lowest level since December 1993.

Exports of industrial goods, forest products, energy products and agricultural and fishing products fell in October. But higher exports of automotive products, machinery and equipment and consumer goods almost offset these declines. The sharp decrease in industrial goods (-2.7%) stemmed primarily from a drop in precious metals exports to the United States and Switzerland. Forest products resumed their downward course (-2.7%), while energy products declined again (-2.2%). After rising sharply in September, agricultural and fishing product exports returned to more normal levels (-2.4%).

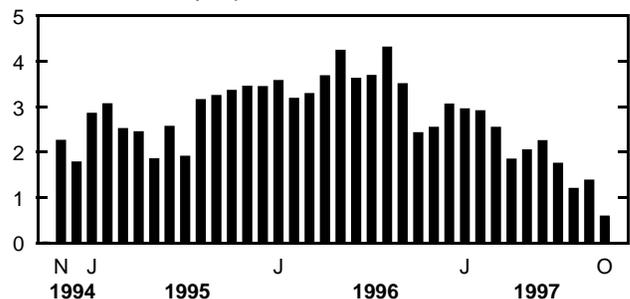
Automotive product exports moved ahead in October (+1.0%), mainly due to motor vehicle parts. Machinery and equipment exports slowed, posting a 0.8% gain. A 3.5% resurgence in consumer goods exports was chiefly due to the games, toys and pharmaceutical products sectors.

Machinery and equipment and automotive products were the biggest contributors to October's rise in imports. Imports of machinery and equipment were up 3.3%, as replacement of aging locomotives and aircraft was behind the strong imports of aircraft

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Trade balance

\$ billions, seasonally adjusted



... Imports grow, exports slip

and other transportation equipment. Automotive products increased 5.0%. Due to strong domestic demand in October, imports of trucks and other motor vehicles and passenger cars both increased.

Imports of industrial goods were also up in October (+ 3.4%). After soaring in September, energy product imports fell 36.1%, as inventories of crude petroleum met seasonal demand.

Available on CANSIM: matrices 3618, 3619, 3651, 3685-3713, 3718-3720, 3887-3913, 8430-8435 and 8438-8447.

Note to readers

Merchandise trade is one component of the current account of Canada's balance of payments, which also includes trade in services.

The October 1997 issue of Canadian international merchandise trade (65-001-XPB, \$19/\$188) is now available. Current account data are available on a quarterly basis in Canada's balance of international payments (67-001-XPB, \$38/\$124). For further information, contact Jocelyne Elibani (613-951-9647 or 1 800 294-5583), International Trade Division. (See also "Current trends" on page 7.)

Consumer prices rise

Between November 1996 and November 1997, the prices of the goods and services that make up the Consumer Price Index (CPI) basket rose by an average 0.9%. Significant increases in air fares, university tuition fees and local telephone service charges were major contributors to the annual advance. Notable price advances were also observed for cigarettes, restaurant meals, food purchased from stores, and piped gas. However, consumers spent much less for mortgage interest charges than they did a year earlier. Gasoline, soft drinks and computer equipment also cost less.

Consumer Price Index, November 1997
% change, previous year, not seasonally adjusted

	All-items	Food	Energy	Housing	Transportation
Canada	0.9	0.9	- 0.1	0.1	0.1
Newfoundland	1.1	- 0.2	6.2	1.9	2.0
Prince Edward Island	0.9	3.3	- 5.9	- 3.5	- 0.1
Nova Scotia	1.0	1.6	1.8	0.6	0.9
New Brunswick	1.1	0.8	4.7	2.3	- 0.4
Quebec	0.8	1.3	- 1.6	- 0.3	- 0.2
Ontario	0.8	0.0	- 1.0	0.2	0.0
Manitoba	1.3	0.9	0.8	0.7	1.6
Saskatchewan	0.1	0.4	- 2.0	1.1	- 1.3
Alberta	1.4	1.8	4.1	1.7	0.3
British Columbia	0.6	2.8	1.0	- 1.9	0.8
Whitehorse	1.9	3.9	5.0	1.4	2.7
Yellowknife	- 1.2	- 3.9	- 1.8	- 1.8	3.5

The small monthly decline (- 0.1%) in the CPI registered in November resulted from several opposing price movements. The decrease was largely associated with a seasonal decline in traveller accommodation rates (- 12.0%) as winter rates were introduced. Prices were also lower for gasoline (- 3.0%) and clothing (- 2.1%), particularly women's and children's wear. Cablevision subscribers received more service for the same payment in November; therefore, the CPI treats this as a price decline (- 7.7%). Homeowners benefited from lower owned accommodation charges, thanks to declining mortgage interest charges and lower maintenance and repair charges. Decreases were registered for the price of certain household furnishings, particularly house and yard tools and kitchen equipment.

While other prices dropped, food prices rose 0.9%, mostly due to higher prices for fresh vegetables (notably tomatoes and lettuce). Price changes for new model vehicles are introduced in the CPI in November of each year. The calculations showed that, on average, new vehicles cost 1.6% more in November than in October. On average, the price of the 1998 models in November was slightly lower than the price of comparable models in November of last year. The cost of natural gas advanced, as did air fares and the price of gas.

Available on CANSIM: matrices 7440-7454, 7477 and 7478.

The November 1997 issue of the Consumer Price Index (62-001-XPB, \$11/\$103) is now available. For further information, contact Sandra Shadlock (613-951-9606; fax: 613-951-2848; Internet: infounit@statcan.ca), Prices Division. (See also "Current trends" on page 7.)

Another increase in retail sales

For a fourth consecutive month, retailers recorded increased sales in October (+ 0.3% to \$19.8 billion). The automotive sector led the way (+ 0.5%). Rising sales by motor vehicle dealers (+ 2.2%) were the principal factor behind this increase.

Sales by general merchandise stores advanced 1.2% in October. Within the general merchandise sector, sales by department stores fell by 0.1%; other general merchandise stores saw improving sales (+ 3.0%). Sales by clothing stores increased 1.1% on the strength of shoe and other clothing stores. These advances offset declines by men's and women's clothing stores.

Note to readers

Retail trade constant dollar data have been rebased to the 1992 reference year. This was done to conform with the historical revisions to the System of National Accounts. Until January 22, 1998, users may obtain rebased constant dollar retail trade data by contacting Greg Peterson (613-951-3592; Internet: petegre@statcan.ca). These data are also available on CANSIM: matrix 2420.

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... Another increase in retail sales

Retail and wholesale trade, October 1997^P Seasonally adjusted

	Retail sales		Wholesale sales	
	\$ millions	% change, previous month	\$ millions	% change, previous month
Canada	19,788	0.3	24,936	1.8
Newfoundland	305	-0.8	193	0.1
Prince Edward Island	87	2.0	50	0.3
Nova Scotia	598	-1.7	533	4.4
New Brunswick	467	-0.3	321	1.8
Quebec	4,627	-0.8	5,108	2.4
Ontario	7,255	1.0	11,190	1.6
Manitoba	711	1.3	960	-0.4
Saskatchewan	669	0.1	914	2.7
Alberta	2,241	1.7	2,688	1.9
British Columbia	2,760	0.0	2,948	1.7
Yukon	24	-6.9	13	-0.4
Northwest Territories	44	-0.8	18	8.0

^P Preliminary figures.

Food store sales faltered in October (-0.6%). Sales by supermarkets and grocery stores were down (-0.4%), as were sales by other food stores (-2.9%). Drug and furniture store sales also declined (-0.6% and -0.2% respectively).

The Prairie provinces posted the largest percentage gains in October (+1.3%). In Ontario, retailers posted a strong increase in sales (+1.0%). Quebec (-0.8%) and the Atlantic provinces (-0.8%) saw their sales decline. In British Columbia, retail sales remained unchanged.

Initial estimates indicate an increase in the number of new motor vehicles sold in November. Despite the decline (-1.2%) in the number of employees in retail trade, total employment rose 0.2%. The number of housing starts dropped by 0.5% compared with the same period in 1996. Wholesale sales rose 1.8% in October.

Available on CANSIM: matrices 2299, 2398-2417 and 2420.

The October 1997 issue of *Retail trade* (63-005-XPB, \$21/\$206) will be available shortly. For further information, contact Louise G n reux (613-951-3549; Internet: logener2@statcan.ca); for analytical information, contact Greg Peterson (613-951-3592; Internet: petegre@statcan.ca), Distributive Trades Division.

Wholesale trade continues to move ahead

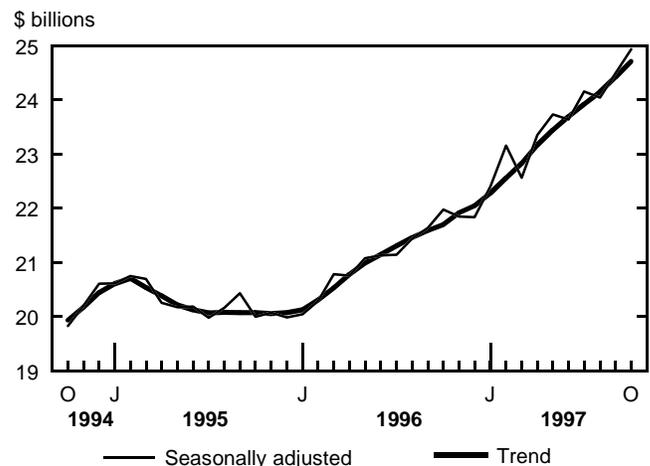
Wholesale sales were strong as the last quarter of 1997 opened, continuing the upward movement that began in January 1996. October's increase was largely attributable to the motor vehicle and parts industry, which recorded a 6.7% increase in wholesaling activities.

Sales of apparel and dry goods rose 6.3% in October, posting the second largest monthly increase of all trade groups. October's sales were 21.7% higher than during the same period of 1996.

Inventories held by wholesalers increased 1.2% in October, reaching a record \$35.0 billion. In October, inventories were up in all trade groups, except for motor vehicles and parts, where wholesalers reduced their stocks (-0.6%) after a significant increase in September.

Since the middle of 1996, sales have increased more rapidly than inventories. Consequently, the inventories-to-sales ratio declined from 1.48 in July 1996 to 1.40 in October 1997. Several factors may explain a reduction in the inventories-to-sales ratio. Wholesalers may practice the "just-in-time" shipments philosophy, or they may have trouble keeping up with high demand. As well, the industrial capacity utilization rate reached a near record level in the third quarter of 1997. And finally, unfilled orders have also been increasing considerably since the beginning of 1997.

Wholesale sales



Available on CANSIM: matrices 59, 61, 648 and 649.

The October 1997 issue of *Wholesale trade* (63-008-XPB, \$19/\$186) is now available. For further information, contact Paul Gratton (613-951-3541; Internet: gratpau@statcan.ca) or Ruth Neveu (613-951-7375), Distributive Trades Division.

Growth in shipments resumes

Total manufacturing shipments advanced 1.5% to \$37.0 billion in October. Gains by smaller manufacturers in the automotive sector were behind the rise. October's performance contrasts with the declines of August and September. Increases were posted for 17 of the 22 major groups, accounting for 83% of shipments. However, three-fifths of the increase was concentrated in the motor vehicle (+ 4.2%), motor vehicle parts and accessories (+ 3.5%) and food (+ 1.7%) industries.

Manufacturers' backlog of unfilled orders, a key determinant of future shipments, rose 2.1% to \$40.8 billion. The largest increases in unfilled orders came from the aircraft and parts (+ 5.3%), motor vehicle (+ 3.3%) and fabricated metal products (+ 2.3%) industries. The machinery industry recorded the largest offsetting decline (-2.3%).

Inventories rose 0.7% to \$47.6 billion, the eighth increase of the year. The major contributors to October's increase in inventories were: machinery (+ 5.3%), food (+ 1.9%) and electrical and electronic products (+ 1.6%). Inventories in the refined petroleum and coal industry were also up. The largest offsetting decreases were observed in the aircraft and parts (-0.8%) and other transportation equipment (-17.1%) industries.

In October, the increase in shipments outpaced the rise in inventories, which resulted in a reduced inventory-to-shipments ratio of 1.28 (down from 1.30 in September).

Manufacturers' shipments, October 1997 Seasonally adjusted

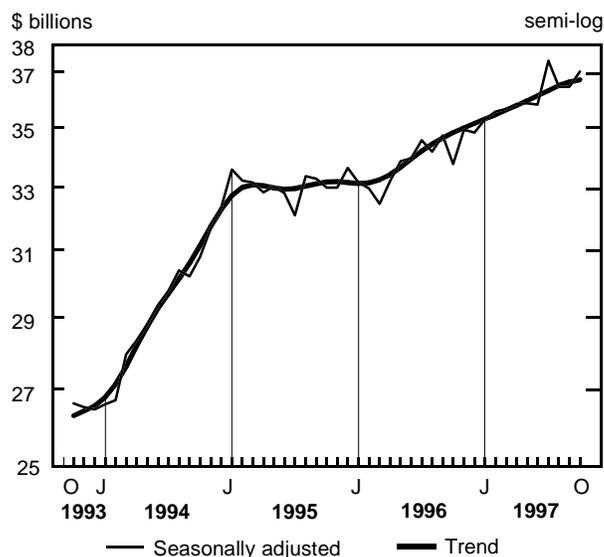
	\$ millions	% change, previous month
Canada	37,013	1.5
Newfoundland	158	6.1
Prince Edward Island	83	6.1
Nova Scotia	536	2.4
New Brunswick	707	3.3
Quebec	8,667	0.0
Ontario	19,720	2.7
Manitoba	874	-1.1
Saskatchewan	539	2.2
Alberta	291	0.1
British Columbia	281	-0.3
Yukon and Northwest Territories	3	0.5

Note to readers

Unfilled orders are a stock of orders that will contribute to future shipments, assuming that orders are not cancelled. New orders represent orders received whether shipped in the current month or not. They are measured as the sum of shipments for the current month (orders received this month and shipped within the same month) plus the change in unfilled orders.

Some orders will not be translated into Canadian factory shipments, as portions of large contracts can be subcontracted out to other countries.

Shipments



Available on CANSIM: matrices 9550-9555, 9558, 9559, 9562-9565, 9568-9579 and 9581-9595.

The October 1997 issue of *Monthly Survey of Manufacturing* (31-001-XPB, \$20/\$196) is now available. For further information, contact Craig Kuntz (613-951-7092) or Robert Traversy (613-951-9497), Manufacturing, Construction and Energy Division. (See also "Current trends" on page 7.)

Growth of leading indicator eases again

Between October and November, growth of the Composite Index eased from 0.6% to 0.5%. The slowdown was largely confined to the natural resource sector and the stock market. Business spending, which has been the main engine of growth in recent months, continued to lead the way.

The accelerated spending by business firms was reflected in the trend of business services employment, non-residential

building and imports of machinery and equipment. Manufacturers didn't fare as well, particularly those in industries related to natural resources. The growth of new orders slowed, while the ratio of shipments to stocks levelled off.

Resource stocks also lay behind all of the retreat in the Toronto Stock Exchange, as commodity prices were affected by the crisis in Asian countries. Stocks related to domestic demand fared better.

The housing index edged down in November, as existing home sales slumped. Housing starts continued to firm after rental vacancy rates dropped, while spending on durable goods grew steadily.

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... Growth of leading indicator eases again

Stock markets in the United States, which are less oriented to resources, recovered completely and contributed to the growth of the U.S. leading indicator. The average workweek and the money supply also contributed to this growth.

Available on CANSIM: matrix 191.

For further information on the economy, the December 1997 issue of *Canadian economic observer* (11-010-XPB, \$23/\$227) is now available. For further information, contact Francine Roy (613-951-3627), Current Economic Analysis Group. (See also "Current trends" on page 7.)

How are firms preparing for the year 2000?

According to the new Survey on Preparedness of Canadian Business for the Year 2000 conducted in the fall, less than half of all firms have taken measures to prepare for anticipated computer problems when the calendar hits January 1, 2000. Less than 10% of all companies were not aware of the problem, while 46% said they were aware of the issue, but had not done anything about it.

Businesses taking no action tended to be small- and medium-sized firms. Among small firms (6 to 50 employees), 61% had not taken action. For medium-sized firms (51 to 250 employees), 30% had not begun to attack the problem. Among large companies (more than 250 employees) less than half had made formal plans to correct the situation, although most (92%) were addressing the problem in some way.

Firms in the finance and insurance sector have led the way in tackling the Year 2000 issue, with 65% taking formal or informal steps. This compares with between 42% and 50% for firms in manufacturing, transportation, communications, utilities, wholesaling, retailing and other service industries. Companies in the primary industries have been slowest to react: only 35% had taken either formal or informal action.

Those companies that indicated they were not taking either formal or informal actions provided a variety of responses to explain their inaction. Some (27%) declared that they were not yet worried about the problem; others (23%) said that it was not an important issue for their company, usually because they use computer systems only minimally. About 14% of firms said they had no time, money or staff to devote to the problem, while

Note to readers

The Survey on Preparedness of Canadian Business for the Year 2000 was conducted in October and November and covered 2,000 Canadian companies, a sample representative of all businesses with more than five employees, excluding public sector offices, schools and hospitals. The survey was conducted for Task Force Year 2000, whose members are Canadian business executives who responded to Industry Minister John Manley's invitation to assess and report on the Year 2000 problem.

The Year 2000 issue refers to the need to fix computers whose programming assumes that every year begins with 19. Most of the world's computers are programmed to identify years by their last two digits only; for example, 98 for 1998.

A **formal plan** should include a complete assessment of all systems used by a business, followed by conversion and testing of those systems requiring modification. **Informal steps** include consultations with information technology suppliers and software vendors, informal discussions with in-house systems staff and contracts with external experts.

another 10% expected their information technology suppliers to deal with it. And around 7% were expecting software developers to come up with a solution that would solve the problem with a mere software installation or upgrade. However, no generally accepted magic solution yet exists.

For further information, contact Jamie Brunet (613-951-6684; Internet: brunjam@statcan.ca), Small Business and Special Surveys Division.

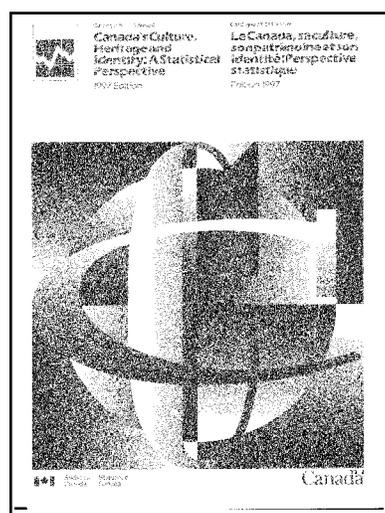
New from Statistics Canada

The Nation Series, Edition 1 1996 Census

The Nation Series, Edition 1 is the first of four CD-ROMS containing tables from the Nation series. This provides 1996 Census data for Canada, the provinces and territories, and, in most cases, for census metropolitan areas. Many tables include comparative data from previous censuses. This first CD-ROM edition includes the complete tables for age, sex and marital status; family structure; structural type of dwelling and household size; and immigration and citizenship.

Included with the package is the software *Beyond 20/20™*. The browser has many powerful features that allow you to quickly and easily search and sort data, and to copy tables and charts to other Windows applications. Three more editions on CD-ROM will be available in April, May and August of 1998 as new census variables are released. Each new edition will incorporate the data from the previous one.

For further information, or to order your copy of *The Nation Series, Edition 1* (93F0020XCB96001, \$60), contact your nearest Statistics Canada Regional Reference Centre.



Canada's culture, heritage and identity: A statistical perspective 1997

Canada's culture, heritage and identity: A statistical perspective provides a broad perspective of the changing cultural landscape in Canada. Data from all the Culture Statistics Program's surveys, as well as data from other sources, are brought together into one comprehensive report that presents the most complete picture ever drawn of culture and the arts in Canada.

The publication contains over 100 bilingual pages packed with explanatory text, charts and summary tables. Canada's ethnic diversity is examined, along with trends in government and private sector expenditures on culture. Employment, revenues and expenditures in the cultural sector are also discussed.

Canada's culture, heritage and identity is an important research tool for professors, students, arts administrators and anyone interested in knowing more about culture and the arts in Canada. It profiles cultural sectors as diverse as printed matter and literature, music and performing arts, visual arts, film and video, radio and television, and sport.

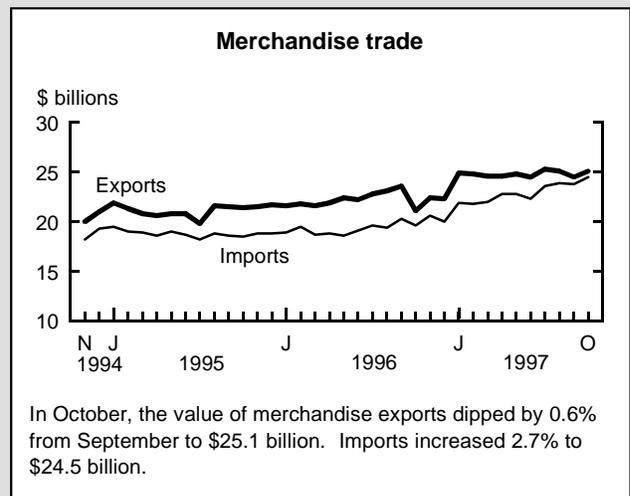
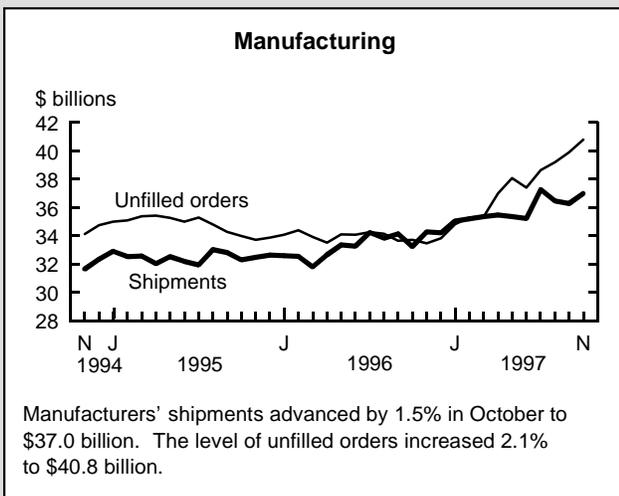
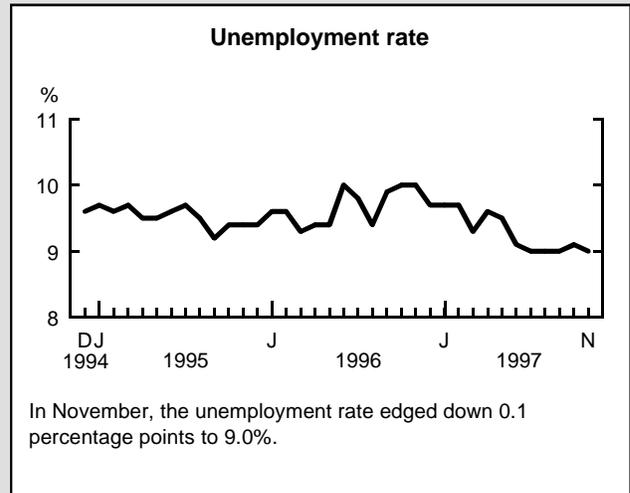
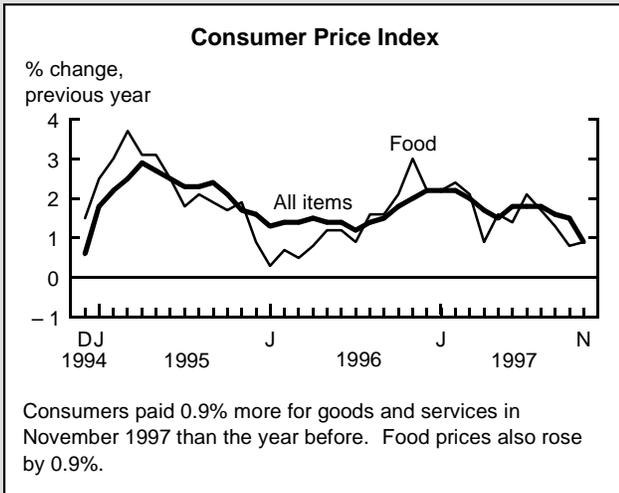
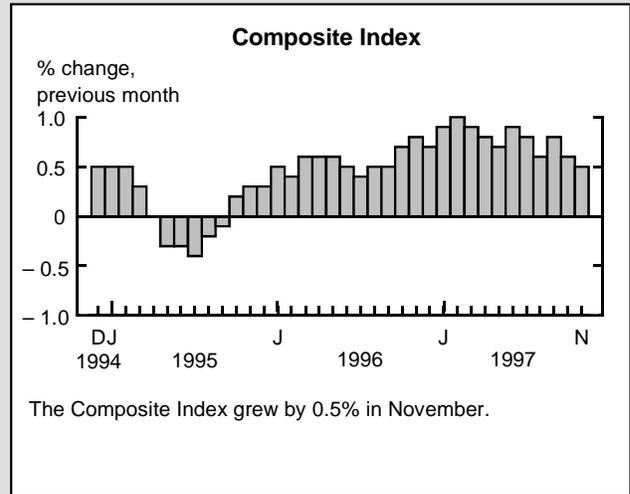
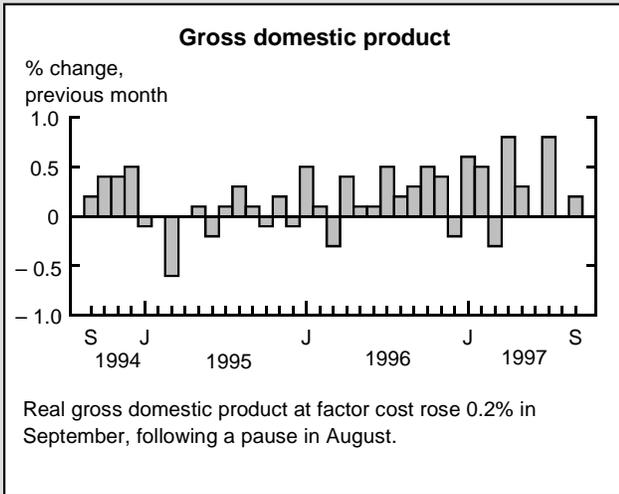
Canada's culture, heritage and identity: A statistical perspective (87-211-XPB, \$31) is now available. For more information, contact Paul McPhie (613-9038) or Lisa Shipley (613-951-1544; fax: 613-951-9040), Culture Statistics Program.

Skeletal street network files 1996

The 1996 *Skeletal street network files* (SSNF) are now available. These digital files consist of cartographic reference features such as major streets (with street names but no address ranges) and some railway features. Most of the reference features used to define census tract boundaries are included, as well as other major roads or streets, some shorelines and large lakes. The SSNF are "thinned out" street network files.

The *Skeletal street network files* (92F0025XDE) are available as standard packages for Canada, census metropolitan areas and some census agglomerations. For further information, or to order these files, contact your nearest Statistics Canada Regional Reference Centre.

Current trends



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)	September	577.5	0.2%	4.2%
Composite Index (1981=100)	November*	201.7	0.5%	9.9%
Operating profits of enterprises (\$ billion)	Q3 1997	27.7	2.7%	11.9%
Capacity utilization (%)	Q3 1997	86.2	1.2†	2.9†
DOMESTIC DEMAND				
Retail trade (\$ billion)	October*	19.8	0.3%	7.4%
New motor vehicle sales (thousand of units)	October	118.7	1.9%	12.5%
LABOUR				
Employment (millions)	November	14.1	0.2%	2.4%
Unemployment rate (%)	November	9.0	-0.1†	-1.0†
Participation rate (%)	November	64.9	0.0†	0.0†
Labour income (\$ billion)	October*	37.48	0.2%	3.8%
Average weekly earnings (\$)	October*	595.81	-0.2%	0.3%
INTERNATIONAL TRADE				
Merchandise exports (\$ billion)	October*	25.0	-0.6%	9.7%
Merchandise imports (\$ billion)	October*	24.5	2.7%	19.9%
Merchandise trade balance (all figures in \$ billion)	October*	0.6	-0.8	-1.8
MANUFACTURING				
Shipments (\$ billion)	October*	37.0	1.5%	9.6%
New orders (\$ billion)	October*	37.9	2.1%	11.6%
Unfilled orders (\$ billion)	October*	40.8	2.1%	18.6%
Inventory/shipments ratio	October*	1.28	-0.02	-0.07
PRICES				
Consumer Price Index (1986=100)	November*	136.8	-0.1%	0.9%
Industrial Product Price Index (1992=100)	October	119.5	-0.3%	0.8%
Raw Materials Price Index (1992=100)	October	125.6	1.1%	-4.7%
New Housing Price Index (1986=100)	October*	132.9	-0.1%	1.1%

Note: All series are seasonally adjusted with the exception of the price indexes.

* new this week

† percentage point

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Publications released from December 19 1997 to January 8, 1998

Division/Title of publication	Period	Catalogue number	Price: Issue/Subscription	
			Canada (C\$)	Outside Canada (US\$)
AGRICULTURE				
Cereals and oilseeds review	October 1997	22-007-XPB	15/149	15/149
BALANCE OF PAYMENTS				
Canada's international transactions in securities	October 1997	67-002-XPB	18/176	18/176
DEMOGRAPHY				
Advantages of the one year mobility variable for breaking down interprovincial migration by age, sex, and marital status	1990-1991	91F0015MPE	5	5
CULTURE, TOURISM AND THE CENTRE FOR EDUCATION STATISTICS				
Canada's culture, heritage and identity: A statistical perspective	1997	87-211-XPB	31	31
DISTRIBUTIVE TRADE				
Department store sales and stocks	November 1997	63-002-XPB	17/165	17/165
New motor vehicle sales	October 1997	63-007-XPB	17/165	17/165
Wholesale trade	October 1997	63-008-XPB	19/186	19/18
HOUSEHOLD SURVEYS				
Income distribution by size in Canada	1996	13-207-XPB	46	46
INTERNATIONAL TRADE				
Canadian international merchandise trade	October 1997	65-001-XPB	19/188	19/188
Imports by commodity (microfiche version)	October 1997	65-007-XMB	37/361	37/361
Imports by commodity (paper version)	October 1997	65-007-XPB	78/773	78/773
MANUFACTURING, CONSTRUCTION AND ENERGY				
Asphalt roofing	November 1997	45-001-XPB	7/62	7/62
Construction type plywood	October 1997	35-001-XPB	7/62	7/62
Crude petroleum and natural gas production	September 1997	26-006-XPB	19/186	19/186
Electric lamps (light bulbs and tubes)	November 1997	43-009-XPB	7/62	7/62
Electric power statistics	October 1997	57-001-XPB	12/114	12/114
Gas utilities	September 1997	55-002-XPB	17/165	17/165
Mineral wool including fibrous glass insulation	November 1997	44-004-XPB	7/62	7/62
Monthly Survey of Manufacturing	October 1997	31-001-XPB	20/196	20/196
Non-metallic mineral products industries	1995	44-250-XPB	40	40
Oils and fats	October 1997	32-006-XPB	7/62	7/62
Primary iron and steel	October 1997	41-001-XPB	7/62	7/62
Primary textile industries	1995	34-250-XPB	40	40
Production and distribution of tobacco products	November 1997	32-022-XPB	7/62	7/62
Sawmills and planing mills	October 1997	35-003-XPB	12/114	12/114
Textile products industries	1995	34-251-xpb	40	40
PRICES				
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