



Infomat

A Weekly Review

Friday, January 25, 2002

OVERVIEW

◆ Exports rebound from 23-month low

Boosted by exports of aircraft, automotive products and electronic equipment, merchandise exports rebounded 1.3% in November from a 23-month low in October.

◆ Inflation eases in 2001

Consumer prices for the goods and services in the Consumer Price Index basket rose 2.6% on average during 2001 compared with 2.7% the year before. The year-over-year inflation rate in December 2001 was 0.7%.

◆ Second consecutive monthly advance in retail sales

Bolstered by robust financing incentives in the auto industry, retail sales increased for a second month in a row in November to \$24.6 billion, up 1.4% from October.

◆ Manufacturers' shipments recoup lost ground

Manufacturers' shipments climbed 1.7% in November, recouping some of October's shortfall. The increase was prompted by gains in the motor vehicle and aerospace product and parts industries.

◆ Wholesale trade posts increase

Wholesalers sold \$32.4 billion worth of goods and services in November, a 0.4% increase from October, thanks mainly to consumer-related products.

◆ Tourism spending drops for second straight quarter

Travellers have spent less on tourism in Canada for two quarters in a row, the first time in a decade that this has happened.

Exports rebound from 23-month low

Boosted by exports of aircraft, automotive products and electronic equipment, merchandise exports rebounded in November from a 23-month low in October. Canadian companies exported \$32.7 billion worth of merchandise, an increase of 1.3% from October.

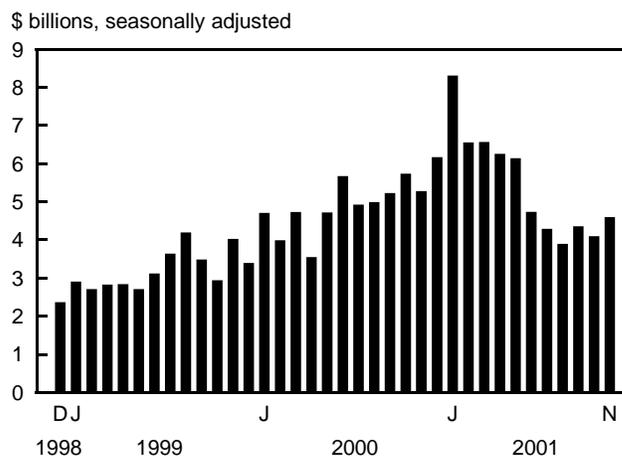
Imports, meanwhile, declined for the fifth straight month, down 0.3% to \$28.1 billion. This was the lowest level since September 1999. As a result of the rise in exports and the decline in imports, November's trade surplus in goods jumped by nearly half a billion dollars to \$4.6 billion.

Merchandise exports to the United States, Canada's largest trading partner, declined 0.4% to \$27.2 billion in November. Imports from south of the border rose 0.7% to \$20.4 billion. As a result, the trade surplus with the United States declined from \$7.0 billion to just under \$6.8 billion.

In the wake of substantially higher exports, the merchandise trade deficit with all countries other than the United States improved by nearly three-quarters of a billion dollars to just over \$2.2 billion.

The value of merchandise exports in the three largest sectors (machinery and equipment, automotive products, and industrial

Merchandise trade balance



(continued on page 2)



... Exports rebound from 23-month low

goods and materials) rose by a combined total of almost \$1 billion. The three accounted for nearly two-thirds of total exports. However, exports of energy products fell for the third month in a row.

Exports of machinery and equipment rose 3.0% to \$8.1 billion, with continued strong export growth in aircraft, engines and parts. The value of aircraft, engines and parts exports climbed 9.7% to a record \$1.8 billion, the second strong month in a row. This total represents a 42.1% jump from November 2000. Exports of television, telecommunications and related equipment increased 8.9% from October to nearly \$1 billion, mainly on the strength of telecom equipment orders from countries other than the United States.

Exports of automotive products rose 5.4% to \$7.8 billion. Exports of passenger autos increased 3.6% to nearly \$4.0 billion, motor vehicle parts jumped 9.0% to \$2.4 billion, and trucks and other motor vehicles climbed 4.5% to \$1.5 billion.

Continued declines in prices drove exports of energy products down 12.3% to \$3.0 billion. Crude petroleum exports dropped 28.0% to \$894.4 million, and natural gas exports fell 11.7% to \$1.3 billion. Electricity exports rebounded from a sharp 54.6% decline in October, rising 8.2% to \$102.5 million. Petroleum and coal products climbed 9.5% to \$662.3 million, after seven months of decline.

Note to readers

Merchandise trade data are generally regularly revised for each month of the current year. Factors influencing revisions include late receipt of import and export documentation, incorrect information on customs forms, replacements of estimates with actual figures, changes in classification of merchandise based on more current information and seasonal adjustments.

Forestry product exports declined 3.0% to \$3.0 billion. Lumber and sawmill product exports fell 3.9%. Lumber exports fell 7.5%, the fourth straight monthly drop. Newsprint and other paper and paperboard exports fell 2.5%. Agricultural and fish product exports declined 1.3% to \$2.6 billion.

Imports declined in all major categories, except automotive products, which gained 1.3%, and agricultural and fishing products, which rose 0.8%.

*For further details, consult the November 2001 issue of **Canadian international merchandise trade** (Internet: 65-001-XIB, \$14/\$141; paper: 65-001-XPB, \$19/\$188). For more information, contact Jocelyne Elibani (1-800-294-5583; 613-951-9647). For analytical information, contact Daryl Keen (613-951-1810), International Trade Division. (See also "Current trends" on page 7.)*

Inflation eases in 2001

Consumer prices for the goods and services in the Consumer Price Index (CPI) basket rose 2.6% on average during 2001, a slightly slower rate of growth than the 2.7% annual average the year before.

These were the highest average annual increases in the inflation rate as measured by the CPI since 1990, when prices increased 4.8% on average, and 1991 when they rose 5.6% after the introduction of the goods and services tax. Annual average indexes are obtained by calculating the average of index levels for the calendar year.

Rising energy prices had nowhere near the impact on the CPI last year that they had in 2000. The annual energy index rose only 3.3% on average in 2001, down substantially from the 16.2% rate of growth the year before.

Excluding energy prices, the all-items CPI rose 2.4% in 2001, mostly the result of price increases for cigarettes, restaurant food, mortgage interest costs, beef and rent.

On a year-over-year basis, goods and services in the CPI basket cost consumers 0.7% more in December 2001 than they did in December 2000. This equalled the rate of growth of the previous month, and was the smallest year-over-year advance since February 1999. The year-over-year increase in the CPI reached a high of 3.9% in May.

Consumer Price Index, December 2001

% change, previous year, not seasonally adjusted

	All items	Food	Shelter	Transportation	Energy
Canada	0.7	3.6	0.8	-4.8	-11.4
Newfoundland and Labrador	-0.5	4.6	-3.5	-5.3	-15.4
Prince Edward Island	0.4	3.6	-1.3	-5.4	-12.8
Nova Scotia	-0.3	3.4	-3.4	-5.7	-18.0
New Brunswick	0.4	3.3	-1.7	-5.5	-12.9
Quebec	1.2	4.1	0.0	-4.7	-12.4
Ontario	1.1	3.8	3.1	-4.7	-6.5
Manitoba	0.2	2.8	0.7	-4.7	-11.9
Saskatchewan	1.0	2.0	3.5	-4.6	-5.7
Alberta	-0.9	3.9	-5.6	-4.5	-28.5
British Columbia	0.4	3.0	0.7	-5.3	-9.4
Whitehorse	-0.5	2.6	-2.3	-3.8	-12.3
Yellowknife	0.9	4.4	-2.3	1.0	-9.7

The slowdown in the year-over-year increase in November and December was primarily due to a decline in energy prices, especially gasoline prices. Energy prices fell 11.4% between December 2000 and December 2001, due mainly to a 19.3% decline in gasoline prices.

Lower prices for fuel oil and natural gas also exerted some downward pressure on the energy index, while an increase in electricity prices somewhat offset the decline.

(continued on page 3)

... Inflation eases in 2001

Factors contributing to the 12-month increase in the all-items CPI in December included higher cigarette prices and rents, as well as higher prices for restaurant food and beef. Lower prices for automotive vehicles and traveller accommodation helped offset the increase.

The CPI excluding food and energy rose 1.6% compared with December 2000.

On a month-over-month basis, the all-items CPI rose 0.1% from November to December last year. This followed a 0.9% decline from October to November.

The biggest impact on the monthly increase in the CPI in December came from higher prices for natural gas, fresh vegetables and, to a lesser extent, fresh fruits and air transportation. Decreases in prices for gasoline, women's clothing, traveller accommodation and fuel oil tempered the monthly rise.

Consumers paid 4.1% less for gasoline in December 2001 than they did the month before, the third straight monthly decline.

The December 2001 issue of the Consumer Price Index (Internet: 62-001-XIB, \$8/\$77; paper: 62-001-XPB, \$11/\$103) is now available. For more information, contact Client Services (1 866 230-2248 or 613-951-9606; infounit@statcan.ca), or Joanne Moreau (613-951-7130), Prices Division. (See also "Current trends," on page 7.)

Second consecutive monthly advance in retail sales

Bolstered by robust financing incentives in the auto industry, retail sales increased for a second month in a row in November.

Retailers sold \$24.6 billion in goods and services, up 1.4% from October, which came on the heels of a 1.8% increase the month before.

While the gain in October was widespread, the increase in November came mostly from car dealers who were offering strong incentives, such as zero-percent financing. Their sales alone rose 6.9% in November to \$6.8 billion. If these had been excluded from the total, retail sales would have declined 0.6%.

In constant dollars, retail sales rose 2.1% in November after a similar gain of 2.4% in October. The only significant price movement affecting retail sales during these two months was gasoline prices, which fell 17%. Retail sales had been virtually flat between April and November, except for a 1.5% decline in September.

Despite signs of a slowdown in 2001, retailers posted a 4.4% cumulative sales gain in the first 11 months of the year, compared with the same period in 2000. Drug stores and furniture stores led other retailers with year-to-date sales increases of about 7%. The remaining five retail sectors all posted cumulative gains of about 4% over the same period.

Sales in the automotive sector advanced 3.4% in November, on the strength of robust sales by motor and recreational vehicle dealers. However, sales by gasoline service stations (-6.4%) continued to reflect lower gasoline prices at the pump. Gasoline service station sales fell 16.8% in the first 11 months of 2001. This followed almost two years of price-driven increases, which pushed up sales more than 50%.

After reporting weak sales in the first nine months of 2001, retailers in the furniture sector posted strong sales gains in October (+2.0%) and November (+2.3%). Retailers in the furniture sector generate about 40% of their total sales from household appliances and furniture, and about 30% from sales of home electronics and computers.

Retail sales, November 2001 Seasonally adjusted

	\$ millions	% change, previous month	% change, previous year
Canada	24,584	1.4	5.2
Newfoundland and Labrador	423	-0.1	10.9
Prince Edward Island	109	1.0	5.6
Nova Scotia	749	1.6	4.8
New Brunswick	605	1.2	3.9
Quebec	5,526	0.7	4.5
Ontario	9,320	2.0	3.8
Manitoba	864	2.0	9.9
Saskatchewan	714	0.9	5.5
Alberta	2,967	1.2	9.1
British Columbia	3,218	1.2	5.0
Yukon	35	11.3	22.6
Northwest Territories	37	1.6	11.0
Nunavut	16	2.0	4.2

All provinces posted sales increases of at least 0.7% in November. Newfoundland and Labrador was the exception, with a marginal 0.1% decline, following a 3.1% gain in October. The strongest gains were reported by retailers in Ontario and Manitoba (both +2.0%).

For the first 11 months of 2001, Alberta (+9.0%) and Newfoundland and Labrador (+8.8%) outpaced other provinces in cumulative retail sales, compared with the same period of 2000. Retail sales in Manitoba (+5.9%) and British Columbia (+5.7%) advanced at a slower pace. The remaining provinces posted cumulative sales advances in 2001 of between 2.3% and 4.2%.

The November 2001 issue of Retail trade (Internet: 63-005-XIB, \$16/\$155) is now available. To order data, contact Client Services (1-877-421-3067; 613-951-3549; retailinfo@statcan.ca). For analytical information, contact Paul Gratton (613-951-3541; paul.gratton@statcan.ca), Distributive Trades Division.

Manufacturers' shipments recoup lost ground

Prompted by increases in the motor vehicle and aerospace product and parts industries, manufacturers' shipments climbed 1.7% to \$41.4 billion in November, recouping ground lost in September and October.

Fifteen of 21 industries, representing 82% of total shipments, reported higher shipment values. Although November showed the first significant gain since May, manufacturing output remained well below 2000 levels. Shipments have tumbled 10.1% since peaking at \$46 billion in October 2000.

Following October's wave of temporary plant shutdowns, November shipments in the motor vehicle industry rose 5.7% to \$5.1 billion, recovering some of October's shortfall as many factories returned to higher production. Throughout 2001, the automobile industry was hit hard by the slowdown in the motor vehicle sector. Continued attempts by manufacturers to adjust retail inventory levels and shortages of parts due to delays at the Canada-U.S. border have contributed to the decline.

Recent uncertainty in the aviation sector has dampened the once-expanding Canadian aerospace product and parts industry. Although production rose 12.7% to \$1.1 billion in November, significant decreases were reported in September (-16.9%) and October (-11.4%). Manufacturers of chemical products also reported higher shipments in November (+3.2% to \$3.0 billion), the second successive monthly increase for this industry. However, decreases in the wood products industry (-3.1%) and in the paper industry (-2.1%) slightly offset November's higher shipments.

Inventories fell 0.5% to \$63.1 billion in November from October, the sixth consecutive decline. Not since the first half of 1992 have manufacturing inventories decreased in so many successive months. Throughout 2001, domestic and foreign demand faltered as international economies weakened. Manufacturers reduced production levels in an attempt to lower finished-product inventories.

A 1.1% cut in raw material inventories was the basis for November's decline. With the exception of a small increase in May, raw materials have been gradually falling since March. Recent declines in raw material prices have contributed to the lower inventories.

The petroleum and coal products industry was the primary contributor to lower inventories in November, falling for the sixth straight month. Inventories decreased 8.0% to \$1.6 billion, and have declined 22% since they reached the \$2.0-billion mark in

Manufacturers' shipments, November 2001 Seasonally adjusted

	\$ millions	% change, previous month
Canada	41,378	1.7
Newfoundland and Labrador	180	3.0
Prince Edward Island	98	-2.5
Nova Scotia	678	-5.5
New Brunswick	950	5.6
Quebec	9,837	0.9
Ontario	22,025	2.3
Manitoba	937	0.0
Saskatchewan	579	1.9
Alberta	3,407	3.2
British Columbia	2,685	-1.1
Yukon, Northwest Territories and Nunavut	4	14.8

May. Weakened petroleum and coal product prices, and continued maintenance shutdowns at some plants, contributed to reduced production and diminished inventory levels in recent months.

Inventories of chemical products, affected by reduced inventories of raw materials and finished products, fell 2.4% in November to \$5.1 billion, their lowest level since July 2001. Lower prices for raw materials were a factor in the decline.

Aerospace inventories gained 0.9% in November, recovering some of October's 2.2% loss. Higher goods-in-process and finished-products inventories were factors in the rise.

Given November's advance in shipments and decline in inventories, the inventory-to-shipment ratio fell to 1.53 from October's nine-year high of 1.56.

Unfilled orders eased back 0.8% to \$47.6 billion in November, following a 1.6% drop in October. Unfilled orders for the aerospace product and parts industry fell 0.9%, a second consecutive drop. New orders rose 2.7% to \$41.0 billion. Excluding the impact of the aerospace product and parts industry, new orders increased only 1.3%.

*The November 2001 issue of the **Monthly Survey of Manufacturing** (Internet: 31-001-XIB, \$15/\$147) will be available soon. To order data, contact the dissemination officer (1-866-873-8789, 613-951-9497, manufact@statcan.ca). For analytical information, contact Russell Kowaluk (613-951-0600; kowarus@statcan.ca), Manufacturing, Construction and Energy Division. (See also "Current trends" on page 7.)*

Wholesale trade posts increase

Wholesalers sold \$32.4 billion worth of goods and services in November, a 0.4% increase from October. This was primarily a result of strong wholesale sales in some sectors that feed the retail segment of the economy.

Leading the pack in November were wholesalers in the "other products" category, where sales rose 3.7%. This category includes merchandise such as toys, sporting goods, photographic equipment, books, jewellery, and video and sound recordings. Had it not been for the strong showing in this category, total wholesale trade would have declined a modest 0.2%.

Also rising in November were other wholesale sectors that contribute significant value to wholesale trade, and that have strong links to the retail industry. Brisk sales of toiletries and health care products helped to raise the beverage, drug and tobacco sector by 1.4%.

Healthy wholesale sales of computer-related equipment and packaged software helped wholesalers in the computers and electronics trade group post a 0.7% rise. Wholesalers of motor vehicles, parts and accessories reported a 0.9% climb, after two consecutive monthly declines.

A third consecutive monthly decline occurred in the industrial and other machinery group, where sales fell 0.6%. Wholesalers of metals and hardware saw their sales drop 1.8%, the third decline in four months. Apparel and dry goods fell 3.3%.

Only five provinces reported higher sales. Following two consecutive monthly declines, Ontario wholesalers gained some of their 1.4% rise in sales on strength in automotive products, computer and electronic products, and the "other products" category. Manitoba (+4.2%) and Newfoundland and Labrador (+0.4%) are two of three provinces where wholesale trade has not generally suffered under the current economic environment. Quebec is the other province, despite November's 0.7% drop.

Wholesale inventories were more or less unchanged at \$43.4 billion. Eight of the 11 wholesale trade groups reported

Wholesale trade, November 2001
Seasonally adjusted

	\$ millions	% change, previous month	% change, previous year
Canada	32,380	0.4	2.2
Newfoundland and Labrador	220	0.4	-2.9
Prince Edward Island	55	3.1	6.0
Nova Scotia	601	1.6	5.3
New Brunswick	422	-2.7	7.2
Quebec	6,736	-0.7	1.0
Ontario	15,851	1.4	1.6
Manitoba	1,017	4.2	14.9
Saskatchewan	952	-0.1	1.3
Alberta	3,358	-0.9	7.9
British Columbia	3,139	-1.8	-1.9
Yukon	11	-3.5	5.7
Northwest Territories	16	16.2	8.7
Nunavut	2	33.7	-28.4

smaller inventories. The largest drops occurred in apparel (-2.0%), household goods (-1.3%), computers and electronics (-1.2%), and in the "other products" category (-1.1%). A major build-up of inventory was reported in the beverage, drug, and tobacco sector (+3.3%). Despite the flat overall results for inventories, wholesalers have been reducing their inventory levels throughout 2001 and into the month of November.

The wholesale inventory-to-sales ratio fell from 1.35 in October to 1.34 in November as wholesalers again limited their rebuilding of stock following October's increase.

*The November 2001 issue of **Wholesale trade** (Internet: 63-008-XIB, \$14/\$140) is now available. For data or general information, contact the Client Services Unit (1-877-421-3067; 613-951-3549; wholesaleinfo@statcan.ca). For analytical information, contact Alexander Hays (613-951-3552; haysale@statcan.ca), Distributive Trades Division.*

Tourism spending drops for second straight quarter

Travellers have spent less on tourism in Canada for two quarters in a row, the first time in a decade that this has happened.

Between July and September last year, tourists spent just over \$11.0 billion in the country, down a sharp 1.8% compared with the previous three months. This abrupt decline, likely a result of September 11, at least in part, followed a 0.4% drop in the second quarter.

Tourism spending fell for five consecutive quarters during the 1990/91 recession.

Canadians spent just over \$7.7 billion in the third quarter, or 70% of the total, while foreign travellers spent about \$3.3 billion, the remaining 30%. All amounts are in "real" terms. That is, they are adjusted for price changes as well as seasonal factors.

Spending by foreign travellers fell 4.5% during the third quarter, more than six times the pace of the 0.7% decline in domestic spending by Canadians. This was the first reduction in more than two years in tourism spending by visitors from abroad, and the third consecutive decline in spending by Canadians.

(continued on page 6)

... Tourism spending drops for second straight quarter

The total number of foreign visitors to Canada fell a substantial 8.3% in the third quarter compared with the second. Declines were comparable for both U.S. tourists and those from other countries.

The number of visitors in September alone fell about 22% from August, probably a result of the events of September 11. Preliminary results for October show a further decrease of 1.2% from September.

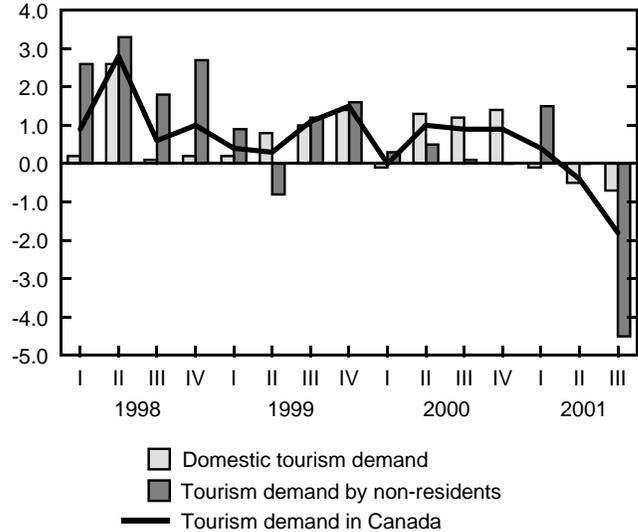
The decline in tourism spending in Canada during the third quarter was widespread. The largest drop occurred in accommodation, where spending fell 4.3% to \$1.4 billion, again in real terms. Foreign spending in this category dropped 7.2%.

Spending on transportation declined 2.5%, and again the drop was larger among foreign travellers (-6.6%). Spending in air transportation, the largest component of the transportation category, fell 4.8%.

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

Real tourism spending

Percentage change from previous quarter, adjusted for seasonal variation and inflation



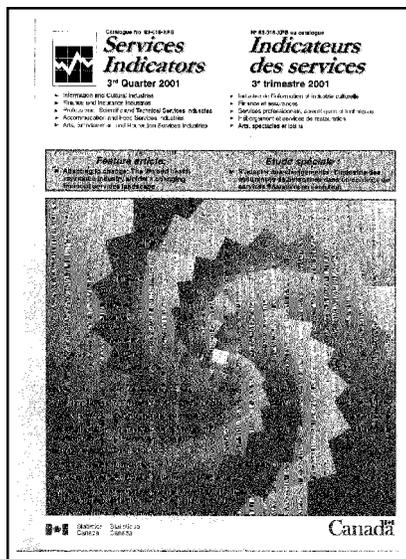
New from Statistics Canada

Services indicators

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

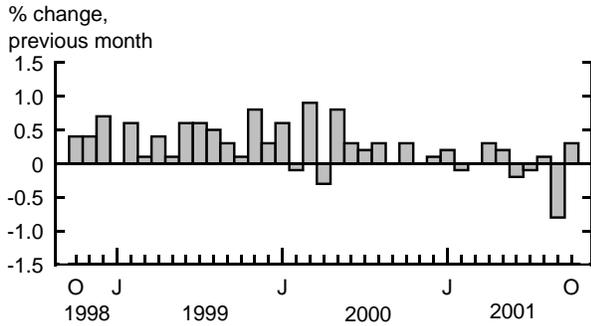
The third quarter 2001 issue features the article "Adapting to change: The life and health insurance industry amidst a changing financial services landscape." A statistical profile of this industry from 1988 to 1998, the article analyzes trends in the context of the industry's evolving regulatory environment, and compares the industry to deposit-accepting intermediaries.

The third 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.



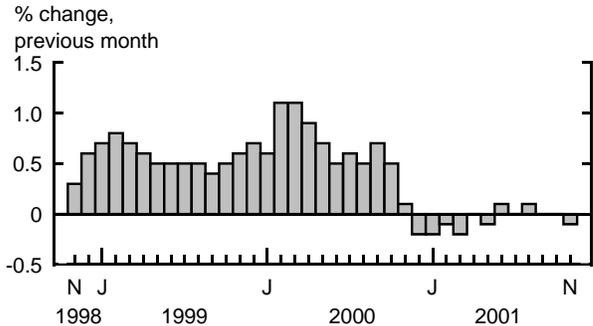
Current trends

Gross domestic product



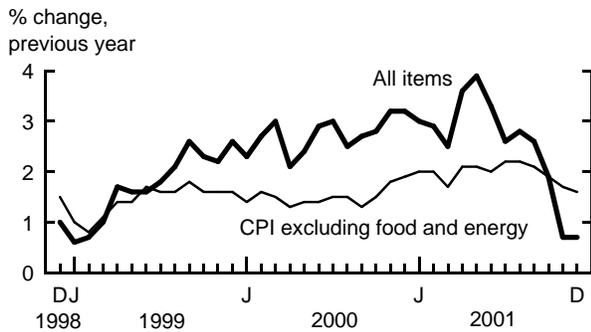
Total economic activity advanced 0.3% in October, after declining 0.8% in September.

Composite Index



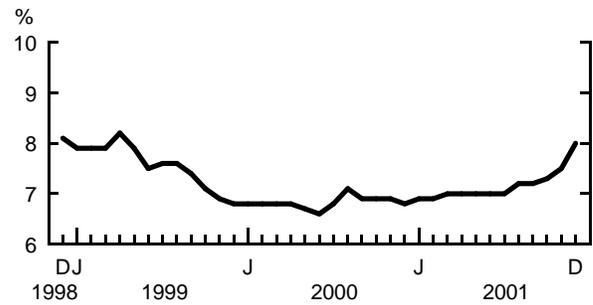
The leading indicator edged down 0.1% in November, mainly as a result of worsening conditions in manufacturing.

Consumer Price Index



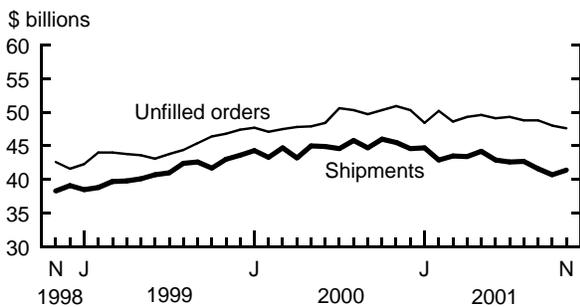
Consumer prices for goods and services were 0.7% higher in December than they were a year earlier. Excluding food and energy, prices rose 1.6%.

Unemployment rate



In December, the unemployment rate surged half a percentage point to 8.0%.

Manufacturing



Manufacturers' shipments climbed 1.7% in November to \$41.4 billion. The backlog of unfilled orders declined 0.8% to \$47.6 billion.

Merchandise trade



In November, the value of merchandise exports rose 1.3% to \$32.7 billion. Imports declined 0.3% to \$28.1 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) ¹	October	932.1	0.3%	-0.6%
Composite Index (1992=100)	November	166.2	-0.1%	-0.7%
Operating profits of enterprises (\$ billions)	Q3 2001	37.6	-14.4%	-24.0%
Capacity utilization rate (%) ²	Q3 2001	79.4	-2.5†	-7.0†
DOMESTIC DEMAND				
Retail trade (\$ billions)	November*	24.6	1.4%	5.2%
New motor vehicle sales (thousands of units)	November	143.7	8.5%	12.6%
Wholesale trade (\$ billions)	November*	32.4	0.4%	2.2%
LABOUR				
Employment (millions)	December	15.1	-0.1%	0.2%
Unemployment rate (%)	December	8.0	0.5†	1.2†
Participation rate (%)	December	66.3	0.3†	0.1†
Average weekly earnings (\$)	October	669.99	0.23%	2.04%
Help-wanted Index (1996=100)	December	126	-5.3%	-27.6%
Regular Employment Insurance beneficiaries (in thousands)	November*	557.1	3.6%	17.5%
INTERNATIONAL TRADE				
Merchandise exports (\$ billions)	November*	32.7	1.3%	-9.8%
Merchandise imports (\$ billions)	November*	28.1	-0.3%	-9.3%
Merchandise trade balance (all figures in \$ billions)	November*	4.6	0.5	-0.7
MANUFACTURING				
Shipments (\$ billions)	November*	41.4	1.7%	-9.1%
New orders (\$ billions)	November*	41.0	2.7%	-11.0%
Unfilled orders (\$ billions)	November*	47.6	-0.8%	-6.4%
Inventory/shipments ratio	November*	1.53	-0.03	0.09
PRICES				
Consumer Price Index (1992=100)	December*	115.9	0.1%	0.7%
Industrial Product Price Index (1997=100)	November	106.5	0.0%	-1.9%
Raw Materials Price Index (1997=100)	November	103.5	-2.9%	-16.2%
New Housing Price Index (1992=100)	November	107.1	0.3%	2.7%

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

* new this week

† percentage point

¹ 1997 replaces 1992 as the base year used in determining prices for gross domestic product by industry. Also, valuation has been changed from factor cost to basic prices.

² Calculation of the rates of capacity use is now based on the 1997 North American Industrial Classification System (NAICS), which has replaced the 1980 Standard Industrial Classification.

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