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Infomat

A Weekly Review

Friday, March 21, 1997

OVERVIEW

- **Demand for vehicles pushes shipments up**

  Manufacturers got off to a strong start in 1997, as U.S. demand for vehicles pushed shipments up to record levels and new contracts expanded order books.

- **Retailers post large increase in sales**

  Retailers posted a large increase in sales in January, as consumers in British Columbia returned to the stores after December's harsh weather.

- **Wholesale trade rises in January**

  Wholesale merchants opened the new year with seven of the eleven trade groups reporting higher sales.

- **Housing and finance behind improvement in composite index**

  Led by the housing and financial sectors, the composite leading indicator continued its gradual improvement in February.

- **Private and public investment to increase in 1997**

  Increased growth in machinery and equipment will cause business and government investment in plant and equipment to rise in 1997.

- **Visitors make record number of trips in new year**

  Foreign visitors set a new monthly record for overnight trips to Canada in January. Americans made nearly three-quarters of the overnight visits.

Demand for vehicles pushes shipments up

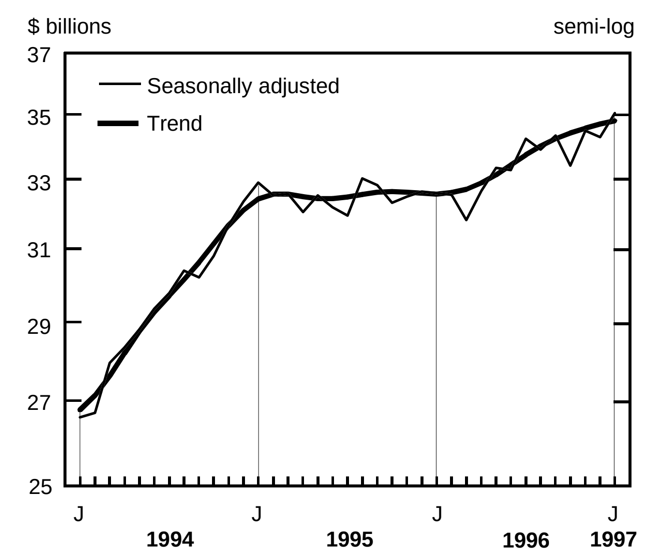
Manufacturers opened 1997 with a 2.2% increase in shipments, setting a record level of $35.1 billion in January. U.S. demand for cars and trucks pushed shipments up, while new contracts saw order books expand. Increases were concentrated in 12 of the 22 major industry groups.

The motor vehicle and parts industries, which together recorded a 9.2% increase, were largely behind January's rise in shipments. Motor vehicle shipments were up 10.8%, in response to strong demand from U.S. suppliers. Outside the automotive sector, the rest of manufacturing also performed well, led by increases in primary metals, chemical products, and the food industries. Declines in the beverage and the paper and allied products industries partly offset the increases.

In January, manufacturers brought inventories down 0.4% to $45.3 billion. This was the second decline in a row, reversing some of the increases seen in the second half of 1996. The largest decreases were in the aircraft and parts (-5.0%) and primary metals (-1.5%) industries, which were partly offset by increases in refined petroleum and coal products and wood.

(continued on page 2)

Shipments



Statistics Canada Statistique Canada

Canada

... Demand for vehicles pushes shipments up

The increase in shipments and the decrease in inventories combined to push the inventory-to-shipments ratio down to 1.29, close to the all-time lows observed two years ago.

The backlog of unfilled orders, a key determinant of future shipments, recorded the largest increase in more than two years, up 3.0% to $34.8 billion. The level of unfilled orders was relatively flat throughout 1996. Orders in the aircraft and parts (+10.9%) and the electrical and electronic parts (+7.0%) industries boosted unfilled orders. Fabricated metal products and motor vehicle parts recorded the largest offsetting decreases.

Manufacturers' shipments, January 1997
Seasonally adjusted

	$ millions	% change, previous month
Canada	**35,054**	**2.2**
Newfoundland	116	-10.1
Prince Edward Island	56	1.9
Nova Scotia	507	2.5
New Brunswick	682	1.5
Quebec	8,286	-1.4
Ontario	18,412	3.3
Manitoba	791	5.0
Saskatchewan	495	5.1
Alberta	2,866	4.3
British Columbia	2,839	3.6
Yukon and Northwest Territories	5	2.8

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 (i.e., orders received this month and shipped within the same month), plus the change in unfilled orders.

New orders rose by 4.3% to $36.1 billion.

Available on CANSIM: matrices 9550–9579 and 9581–9593.

The January 1997 issue of ***Monthly survey of manufacturing*** *will be available shortly. For further information, please contact Richard Evans (613-951-9834) or Robert Traversy (613-951-9497), Industry Division. (See also "Current Trends" on page 7.)*

Retailers post large increase in sales

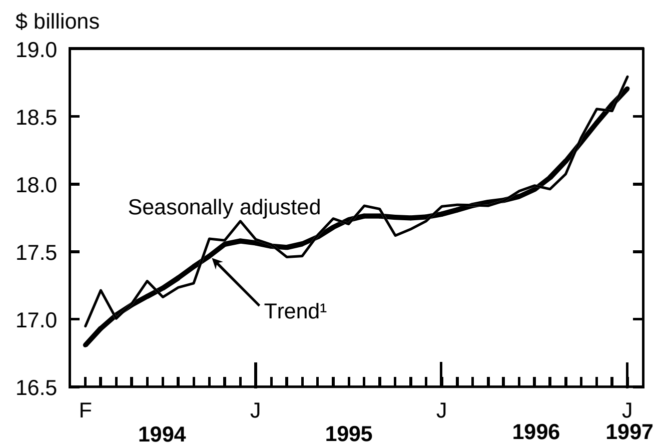
Retailers posted a large increase in sales (+1.4%) in January 1997, after a small decline (-0.1%) in December. British Columbia had a significant impact on this rise, as consumers there returned to stores after December's harsh weather. When British Columbia is excluded from the total, retail sales rose by only 0.1% in January.

After a 5.4% decline in sales in December, B.C. retailers saw a 9.6% increase in January. Consumers returned to stores after the winter storm in late December, spending 9.7% more in January 1997 than in the same month of 1996. In Quebec and the Prairie provinces, consumers also spent more, as retailers posted increases of 1.1% and 2.7% respectively. However, sales dropped in Atlantic Canada (-2.6%) and Ontario (-1.7%).

January's increase was broad-based, as sales rose in six out of seven retail sectors. The only decline was in general merchandise stores. In dollar terms, advances were largest in other retail stores, food stores, and the automotive sector.

In the automotive sector, higher sales in automotive parts, accessories and services and gasoline service stations offset the falling sales of recreational and motor vehicles. The number of new motor vehicles sold dropped 6.3% in January. For the second straight month, sales increased in the food sector (+2.0%). An increase in department store sales (+1.4%) was unable to offset the 3.0% decline in sales by other general merchandise stores. Sales in general merchandise stores declined for the second consecutive month.

Retail sales



¹ *Trend represents smoothed seasonally adjusted data.*

Early estimates of February sales indicate an increase in the number of new motor vehicles sold. February figures show 27,000 fewer employees in retail trade and a 9.6% rise in the number of housing starts. Retail trade in the United States grew 1.5% in January, after a 0.8% increase in December.

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

The December 1996 issue of ***Retail trade*** *(63-005-XPB, $20/$200) will be available shortly. For further information, contact Louise Généreux (613-951-3549). For analytical information, contact Greg Peterson (613-951-3592), Industry Division.*

Wholesale trade rises in January

Wholesale merchants opened the new year with $22.1 billion in sales, a 1.4% increase over December. Monthly sales by wholesalers have increased 10.5% over the last year, in contrast to a 2.8% decline during 1995.

Seven of the eleven trade groups—representing 84% of January sales—showed increases. Sales by wholesalers of lumber and building materials rose 1.3% in January, continuing last year's upward trend. The lumber and building materials industry was one of the most dynamic sectors in 1996, increasing 23% over the year. This reflects a stronger housing market.

In January, wholesalers' inventories rose 0.2% to reach $32.2 billion. Because the growth in total sales outpaced the growth in inventories, the inventories-to-sales ratio declined from 1.47 in December to 1.45 in January. The ratio seems to have stabilized over the last few months after almost a year of decline.

Wholesalers of computers, packaged software and other electronic products continued to increase inventories in January (+1.4%). They have been accumulating stocks since mid-1995 to keep pace with this sector's high sales growth. Since May 1995, sales and inventories have risen—37% and 30% respectively. The inventories-to-sales ratio for computers, packaged software and other electronic products dropped from 1.01 in May 1995 to 0.96 in January 1997.

Retail and wholesale trade, January 1997
Seasonally adjusted

	Retail sales		Wholesale sales	
	$ millions	% change, previous month	$ millions	% change, previous month
Canada	**18,794**	**1.4**	**22,142**	**1.4**
Newfoundland	296	0.3	190	3.0
Prince Edward Island	81	-0.9	45	-2.1
Nova Scotia	587	-0.6	495	0.1
New Brunswick	435	-2.6	301	5.3
Quebec	4,484	1.1	4,768	1.0
Ontario	6,625	-1.7	9,641	0.8
Manitoba	685	4.1	817	-2.0
Saskatchewan	618	-0.2	732	-2.4
Alberta	2,100	3.2	2,233	1.8
British Columbia	2,815	9.6	2,896	5.7
Yukon	26	3.1	10	0.1
Northwest Territories	41	1.8	15	13.1

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

The January 1997 issue of ***Wholesale trade*** *(63-008-XPB, $18/$180) will be available shortly. For further information, contact Paul Gratton (613-951-3541) or Sylvie Ouellette (613-951-3552), Distributive Trades Division.*

Housing and finance behind improvement in composite index

The composite leading indicator rose 1.0% in February, led by the housing and financial markets. The increase matched the revised growth rate for January and was slightly better than the gains posted late last year. The gain in capital spending was accompanied by a sizeable increase in construction employment, which contrasted sharply with the slack in other industries (notably retail trade, where sales were sluggish at the turn of the year).

Housing continued to spearhead the gains in household demand. Single-family housing starts jumped 29%, hitting a seven-year high of 88,000 units (at annual rates). Furniture and appliance sales picked up along with housing.

Manufacturers rebuilt their inventories in February, which lowered the ratio of shipments to stocks from 1.68 to 1.67. Firms continued to stretch the workweek, recouping most of the losses recorded over the last two years. New orders for durable goods levelled off, led by the capital goods sector. Increased demand by firms led to the first employment increase in business services in five months.

The U.S. composite leading indicator increased 0.1% as the sources of growth shifted from financial markets to labour and consumer demand.

Available on CANSIM: matrix 191.

For further information on the economy, the March issue of ***Canadian economic observer*** *(11-010-XPB, $22/$220) will be available shortly. For further information, contact Francine Roy (613-951-3627), Current Economic Analysis Group. (See also "Current Trends" on p. 7.)*

Private and public investment to increase in 1997

Business and government plan to invest $104.3 billion in plant and equipment in 1997, a 4.4% increase over 1996, and the second strongest growth rate since 1993. Investment in machinery and equipment, which is expected to increase by 7.6%, accounts for the growth.

Lower interest rates, higher profits and increased capacity use are providing a positive investment climate for manufacturing companies. Leasing companies, along with cable and telephone companies, also display strong investment. Federal and provincial government spending restraints have dampened the growth rate in non-residential construction.

Investment by manufacturing companies in machinery and equipment is expected to increase 10.1% in 1997, led by producers of chemicals, pulp and paper and transportation equipment. New projects and major expansions will cause an increase of $556 million in the chemical industries. Significant investment in machinery and equipment is planned in the paper and allied products, transportation equipment, and primary metals industries.

Investment by leasing companies in cars and trucks is expected to reach $8.7 billion in 1997, a significant increase of $2.1 billion. Cable and telephone companies plan total investment of $5.5 billion, a 19.4 % rise. Investment in residential housing is expected to reach $34 billion (+7.7%), reflecting low mortgage rates and stronger demand for new housing. The latest Building and Demolitions Permit Monthly Survey, which provides an early

(continued on page 4)

... Private and public investment to increase in 1997

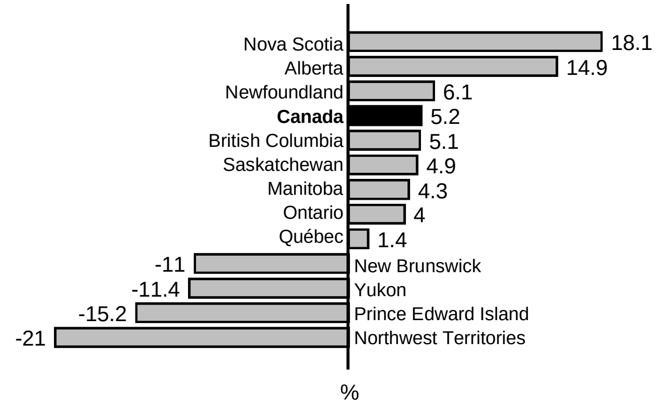
indication of future building activity, also shows comparable growth for residential construction.

Three provinces are expecting growth above the 5.2% national average: Nova Scotia, Alberta and Newfoundland.

Available on CANSIM: matrices 3101–3135.

Private and public investment in Canada, intentions 1997 *(61-205-XPB, $45) is now available. For further information, contact Gilbert Paquette (613-951-9818; 1 800 571-0494; Internet: gilbert@statcan.ca). For analytical information; contact Justin Lacroix (613-951-2589; Internet: lacrjus@statcan.ca) or Mychèle Gagnon (613-951-2593; Internet: gagnmyc@statcan.ca), Investment and Capital Stock Division.*

Expected investment growth, 1997



Visitors make record number of trips in new year

In January 1997, foreign visitors set a new monthly record for overnight trips to Canada. They stayed at least one night on more than 1.5 million of the trips they made, up 1.8% from December 1996. Americans made nearly three-quarters of the overnight trips to Canada in January (1.1 million).

Overnight trips to Canada by overseas residents (those from countries other than the United States) reached another new high in January. The long-term trend for such trips has been on the rise, and their number has doubled since January 1988.

Canadians made 321,000 trips to overseas destinations in January, unchanged from December's record high. They made most of their overnight international trips to the United States, although a 6.8% drop in overnight trips between December and January was the largest monthly decline in three years. Canadians, particularly those from Ontario and Quebec, favour Florida in the winter. In 1996, overnight visits to Florida were up for the first time since 1993. Outside of the United States, Mexico is the most popular destination during winter.

Travel between Canada and other countries, January 1997

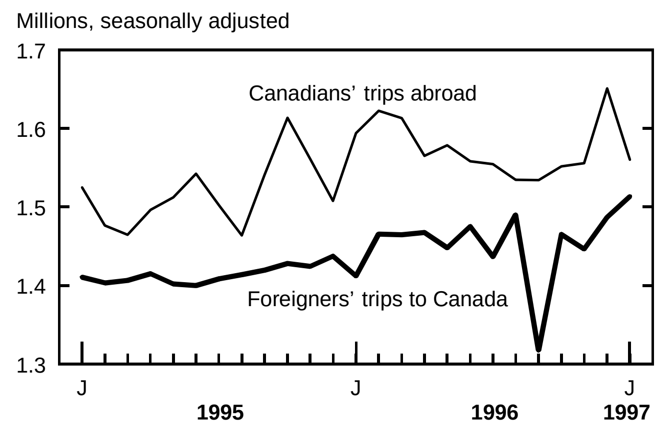
	thousands	% change, previous month	thousands	% change, previous year
	seasonally adjusted		unadjusted	
Canadian trips abroad				
Auto trips to the United States				
Same-day	2,925	0.8	2,404	-2.1
One or more nights	754	-8.2	451	-10.9
Total trips, one or more nights				
United States[1]	1,239	-6.8	949	-5.1
Other countries	321	0.0	457	7.1
Travel to Canada				
Auto trips from the United States				
Same-day	2,043	0.3	1,528	5.8
One or more nights	700	0.2	270	9.7
Total trips, one or more nights				
United States[1]	1,125	2.0	470	9.0
Other countries[2]	388	1.3	158	18.7

[1] Estimates for the United States include counts of cars and buses, and estimated numbers for planes, trains, boats and other methods.
[2] Figures for other countries exclude same-day entries by land only, via the United States.

Note to readers

Month-to-month comparisons use seasonally adjusted data (data adjusted for variations that repeat annually and for variability caused by the different volumes of travellers associated with different days of the week), while year-over-year comparisons use unadjusted data (the actual traffic counts). Excursions are same-day trips.

Overnight trips between Canada and other countries

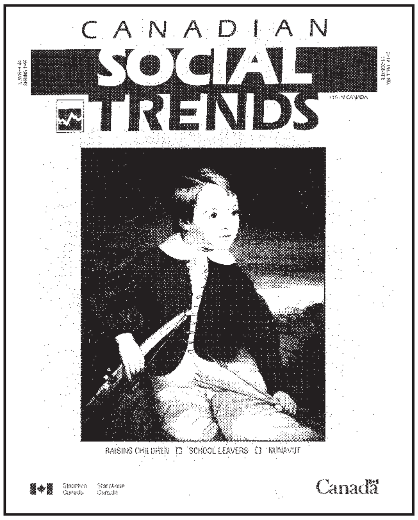


Americans made 2.0 million same-day car trips to Canada in January. This was up slightly over December and was the highest level in more than 15 years. Canadians also made more same-day cross-border car trips in January than during the previous month. The number of Canadian car excursions to the United States has fluctuated since early 1997 and has remained well below the peak reached in November 1991, when the Canadian dollar was worth US$0.88.

Available on CANSIM: matrices 2261–2697, 5780–6046 and 8200–8328.

The January 1997 issue of ***International travel, advance information*** *(66-001-PPB, $7/$70) will be available shortly. For further information, contact Luc Dubois (613-951-1674; fax: 613-951-2909; Internet: duboluc@statcan.ca), Culture, Tourism and the Centre for Education Statistics.*

New from Statistics Canada



Canadian social trends

Spring 1997

The spring 1997 issue of *Canadian social trends* features the following articles: “Canadian children in the 1990s: Selected findings of the National Longitudinal Survey of Children and Youth,” “School leavers revisited,” “Nunavut: Canada’s newest territory in 1999,” “Canadian television in transition,” and “The persistence of Christian religious identification in Canada.”

Each quarter, *Canadian social trends* integrates data from many sources to examine emerging social trends and issues. It also features the latest social indicators, as well as information about Statistics Canada’s products and services.

The spring 1997 issue of ***Canadian social trends*** *(11-008-XPE, $10/$34) is now available. For further information, contact Susan Crompton (613-951-2556), Housing, Family and Social Statistics Division.*

Longitudinal administrative databank

1982–1994

Data for 1994 have been added to the *Longitudinal administrative databank* (LAD). The LAD is a 10% sample that follows the same individuals from 1982 to 1994. It is developed from personal income tax returns and contains demographic, income and other taxation information. Aggregated information for both individuals and families may be obtained. The adult (18 years and over) coverage of LAD has increased from 88% in the earlier years to 96% in 1994. The level of geography for which estimates can be produced depends on the sample size, subject to confidentiality rules.

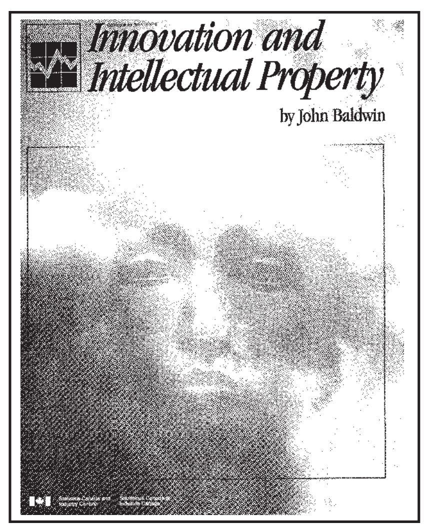
Data from the ***Longitudinal administrative databank*** will be of particular interest to researchers, analysts and policy planners.

For more information, contact Client Services (613-951-9720; fax: 613-951-4745; Internet: saadinfo@statcan.ca), Small Area and Administrative Data Division.

Innovation and intellectual property

The publication *Innovation and intellectual property* is based on data from the 1993 Survey of Innovation and Advanced Technology. Firms reported their research and development, innovation, technology and intellectual property activities for the period from 1989 to 1991.

Innovation and intellectual property *(88-515-XPE, $20) is now available. For further information, contact John Baldwin (613-951-8588), Micro-economics Analysis Division.*



New from Statistics Canada

StatCan: CANSIM Disc

March 1997

A comprehensive collection of data, simple retrieval software and excellent documentation make the *StatCan: CANSIM Disc* a valuable source of socio-economic information about Canada. The March 1997 edition of the CD-ROM puts over 700,000 series of current and historical data at your fingertips. Finding data and reference material is easy. You can search by keyword or choose from a list of topics, selecting progressively narrower topics to locate the information you need. A few keystrokes will give you detailed information on subjects ranging from agriculture to zinc mining.

The March 1997 ***StatCan: CANSIM Disc*** *is now available (single issue: $1,995 in Canada, US$1,995 in other countries; subscription* [*two issues*]: *$2,995 in Canada, US$2,995 in other countries). Discounts for educational institutions are available. For further information, or to order, please contact your nearest Statistics Canada Regional Reference Centre.*

Perspectives on labour and income

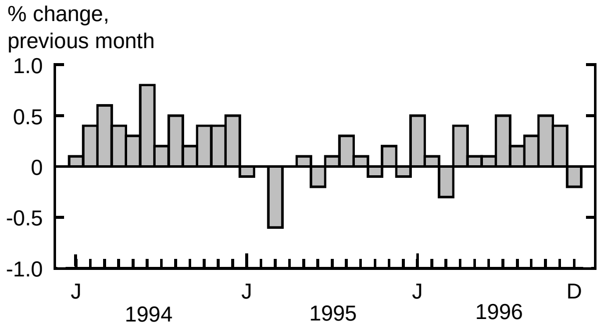
Spring 1997

The Spring issue of *Perspectives on labour and income* features two articles on the North: the first study compares economic and employment trends in the Northwest Territories and the Yukon with those in the rest of the country, while the second compares earnings and income. An article on the clothing manufacturing industry looks at recent and future employment trends. Two articles on RRSPs are also included. One examines patterns of RRSP participation among the young, while the other looks at low income participants. Two articles previously issued as advance releases also appear: a review of changes and trends in the labour market in 1996, and highlights of the 1995 Survey of Work Arrangements. The “Key labour and income facts” section features charts and analysis on the growth of self-employment over the last decade.

The Spring 1997 issue of ***Perspectives on labour and income*** *(75-001-XPE, $17/$56) is now available. For further information, contact Jeffrey Smith (613-951-6894), or Jeannine Usalcas (613-951-4628), Labour and Household Surveys Analysis Division.*

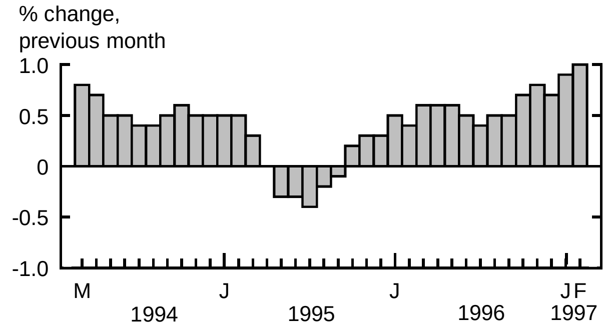
Current trends

Gross domestic product



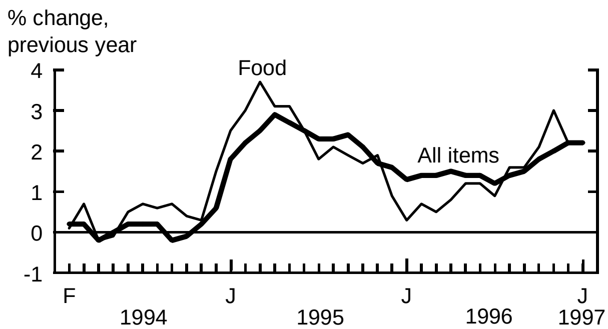
Real gross domestic product at factor cost decreased 0.2% between November and December.

Composite index



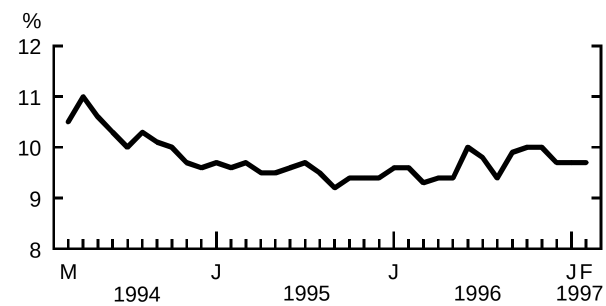
The composite index grew by 1.0% in February.

Consumer price index



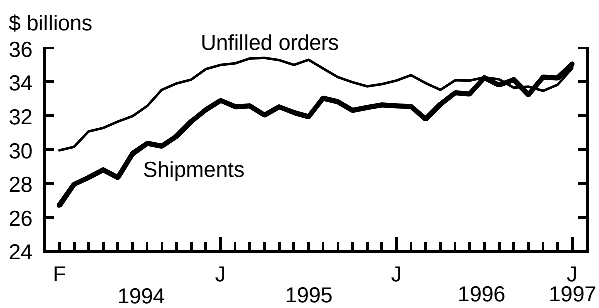
Consumers paid 2.2% more for goods and services in January 1997 than the year before. Food prices also rose by 2.2%.

Unemployment rate



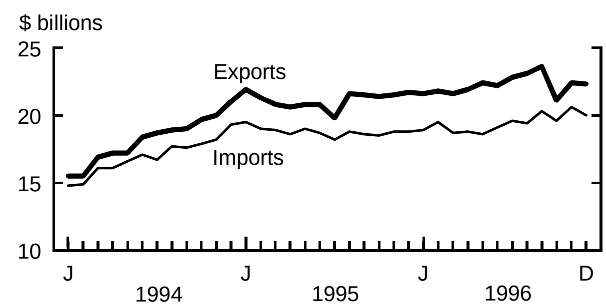
In February, the unemployment rate held at 9.7%.

Manufacturing



Manufacturers' shipments rose 2.2% in January to $35.1 billion. The level of unfilled orders increased 3.0% to $34.8 billion.

Merchandise trade



In December, the value of merchandise exports dropped 1.1% from November to $22.3 billion. Imports decreased 2.7% to $20.0 billion.

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

Latest monthly statistics

	Period	Level	Change, previous period	Change, previous year
GENERAL				
Gross domestic product ($ billion, 1986)	December	557.5	-0.2%	2.6%
Composite index (1981=100)	February*	189.0	1.0%	8.5%
Operating profits of enterprises ($ billion)	Q4 1996	25.7	5.7%	10.4%
Capacity utilization (%)	Q4 1996	84.8	0.7†	2.4†
DOMESTIC DEMAND				
Retail trade ($ billion)	January*	18.8	1.4%	5.6%
New motor vehicle sales (thousand of units)	January	105.4	-6.3%	12.0%
LABOUR				
Employment (millions)	February	13.7	-0.1%	0.6%
Unemployment rate (%)	February	9.7	0.0†	0.1†
Participation rate (%)	February	64.6	-0.1†	-0.5†
Labour income ($ billion)	November	36.5	0.8%	3.6%
Average weekly earnings ($)	December	593.82	0.2%	2.7%
INTERNATIONAL TRADE				
Merchandise exports ($ billion)	December	22.3	-1.1%	2.7%
Merchandise imports ($ billion)	December	20.0	-2.7%	6.1%
Merchandise trade balance (all figures in $ billion)	December	2.4	0.3	-0.6
MANUFACTURING				
Shipments ($ billion)	January*	35.1	2.2%	7.6%
New orders ($ billion)	January*	36.1	4.3%	9.9%
Unfilled orders ($ billion)	January*	34.8	3.0%	2.2%
Inventory/shipments ratio	January*	1.29	-0.04	-0.09
PRICES				
Consumer price index (1986=100)	January	137.1	0.2%	2.2%
Industrial product price index (1986=100)	January	129.4	-0.2%	-0.5%
Raw materials price index (1986=100)	January	141.8	0.1%	10.5%
New housing price index (1986=100)	January	132.2	0.2%	-0.6%

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

Infomat
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Publications released from January 14 to 20, 1997

Division/Title of publication	Period	Catalogue number	Price: Issue/Subscription Canada (C$)	United States (US$)	Other countries (US$)
BALANCE OF PAYMENTS					
Canada's balance of international payments	Fourth quarter 1996	67-001-XPB	36/120	44/144	51/168
Canada's international transactions in securities	December 1996	67-002-XPB	17/170	21/204	24/238
CURRENT ECONOMIC ANALYSIS					
Canadian economic observer	March 1997	11-010-XPB	22/220	27/264	31/308
EDUCATION, CULTURE AND TOURISM					
Touriscope, international travel, advance information	Vol. 13, no. 1	66-001-PPB	7/70	9/84	10/98
HOUSING, FAMILY AND SOCIAL STATISTICS					
Canadian social trends	Spring 1997	11-008-XPE	10/34	13/41	15/48
INDUSTRIAL ORGANIZATION AND FINANCE					
Quarterly financial statistics for enterprises	Fourth quarter 1996	61-008-XPB	33/110	40/132	47/154
INDUSTRY					
Electric lamps (light bulbs and tubes)	November 1996	43-009-XPB	6/60	8/72	9/84
Fruit and vegetable production	March 1997	22-003SXPB	30/60	36/72	42/84
Industrial chemicals and synthetic resins	January 1997	46-002-XPB	6/60	8/72	9/84
Monthly survey of manufacturing	January 1997	31-001-XPB	19/190	23/228	27/266
New motor vehicle sales	December 1996	63-007-XPB	16/160	20/192	23/224
Non-metal mines	1995	26-224-XPB	24	29	34
Pulpwood and wood residue statistics	January 1997	25-001-XPB	7/70	9/84	10/98
Refined petroleum products	December 1996	45-004-XPB	20/200	24/240	28/280
Steel wire and specified wire products	January 1997	41-006-XPB	6/60	8/72	9/84
INDUSTRY MEASURES AND ANALYSIS					
Gross domestic product by industry	December 1996	15-001-XPB	14/140	17/168	20/196
INVESTMENT AND CAPITAL STOCK					
Building permits					
Microfiche version	1996	64-203-XMB	35	42	49
Paper version	1996	64-203-XPB	60	72	84
Private and public investment in Canada					
Microfiche version	Intentions 1997	61-205-XMB	35	42	49
Paper version	Intentions 1997	61-205-XPB	45	54	63
LABOUR AND HOUSEHOLD SURVEYS ANALYSIS					
Perspectives on labour and income	Spring 1997	75-001-XPB	17/56	21/68	24/80
MICRO-ECONOMICS ANALYSIS					
Innovation and intellectual property		88-515-XPE	20	20	20
PRICES					
Average prices of selected farm inputs	January 1997	62-012-XPB	9/48	11/58	13/68
Consumer prices and prices indexes	October–December 1996	62-010-XPB	24/80	29/96	34/112

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Subject Index January 6, 1996 to June 28, 1996

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Reference period:	Issue date:
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