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Infomat

A Weekly Review

Friday, April 19, 2002

INSIDE

- **More than one-third of total consumer retail spending on vehicles and gas**

  Consumers spent more on all major commodities in 2001. Retail spending on motor vehicles and related products and services hit $105.9 billion, up 3.7% from 2000. This represented just over one-third of total retail spending.

- **Manufacturing sector recovery continues**

  Driven by the resurgence of the motor vehicle industry, manufacturing shipments increased 0.8% to $42.1 billion in February. This followed a 3.2% surge in January and was the first back-to-back monthly gain in two years. Shipments of motor vehicles recovered strongly as several plants returned to more normal production levels.

- **New house prices jump to highest levels in twelve years**

  Prices for new houses rose 0.7% in February from January, the highest monthly increase since January 1990. Compared with February 2001, the index of contractors' selling prices increased 3.2%, the largest 12-month advance since May 1990.

- **Graduates drawn towards self-employment**

  Graduates appear to be drawn towards self-employment rather than pushed into it due to an absence of other options. Individuals were lured to self-employment even as employment rates improved over their early post-graduation careers.

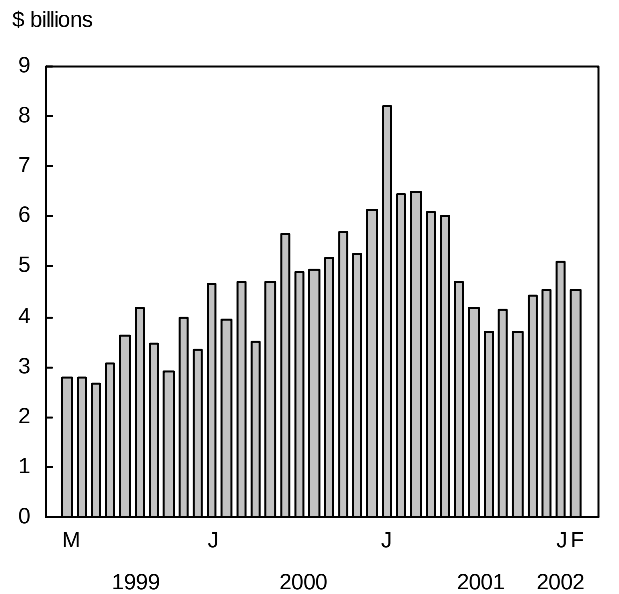
Largest monthly increase in exports in nearly two years

Canadian companies exported $33.7 billion worth of goods, up 2.7% from January's revised level, the largest monthly increase in almost two years. Both exports and imports posted increases in February as automobile assembly lines stepped up production after shutdowns in January.

However, imports increased at almost twice the pace of exports, rising 5.1% to $29.1 billion. This was the strongest monthly rate of growth in imports since August 1998. As a result, Canada's trade surplus fell for the first time in four months to just over $4.5 billion from nearly $5.1 billion in January.

The trade surplus with the United States edged down about $33 million to $7.6 billion. Canadian companies sent $28.5 billion in goods to the United States, up 1.6% from January's revised level, while they imported $20.9 billion worth, up 2.4%.

Trade balance



(continued on page 2)

Largest monthly increase... *(continued from page 1)*

The U.S. accounted for just over one-half of the increase in Canada's exports in February, and only about one-third of the increase in imports. Consequently, Canada's total trade deficit with other nations widened by half a billion dollars from $2.6 billion to $3.1 billion.

With continued consumer confidence and strategic inventory building, passenger auto exports roared ahead 24.2% to $4.3 billion. This pushed exports of the automotive products sector up 12.0% to $8.3 billion, passing the machinery and equipment export sector for top spot. Auto plants, which had been shut down for several weeks in January, began working overtime, giving exports of passenger autos the largest monthly percentage increase in nearly four years.

In the machinery and equipment sector, exports fell 8.0% to $8.0 billion. Aircraft and other transportation equipment led the decline. Exports of aircraft engines and parts were down more than half a billion dollars from the record high set in January.

Industrial goods and materials exports rose 5.9% to $5.8 billion. Gains in this sector over the past five years have been driven by a steady increase in exports of chemicals, plastics and fertilizers. In the energy sector, exports increased 2.8% to $3.1 billion, the third straight monthly increase.

The forestry products export sector picked up steam, rising 7.2% to just under $3.1 billion. Exports of lumber and sawmill products rose for the third straight month, up 5.3% to $1.6 billion. The 19.3% countervailing duties imposed in August expired in mid-December, giving Canadian lumber producers a temporary reprieve.

Auto manufacturers cranked up production in February, following numerous mid-winter plant shutdowns in North America. Consequently, imports of motor vehicle parts surged 13.4% to $3.7 billion. In the consumer goods sector, imports increased 5.1% to $3.8 billion. Economic conditions resulting in strong housing starts and real estate sales in Canada translated into record imports of home furnishings.

Imports of machinery and equipment, Canada's largest import sector, rose 5.3% to $8.8 billion. Within this sector, imports of aircraft and other transportation equipment bounced back 22.9% to $1.2 billion as commercial carriers invested in new aircraft and equipment.

Canadian international merchandise trade *(Internet: 65-001-XIB, $14/$141; paper: 65-001-XPB, $19/$188) will be available soon. For general information, contact Jocelyne Elibani, (613-951-9647; 1-800-294-5583). For analytical information, contact Daryl Keen (613-951-1810), International Trade Division. (See also "Current trends" on page 7.)*


Travel-log
Spring 2002
China's Tourism Markets: an Overview of Trends, Developments and Prospects
In This Issue...
Canada

Travel-log

The spring 2002 issue of *Travel-log*, Statistics Canadas quarterly tourism newsletter, features the article, "Chinas tourism markets: An overview of trends, developments and prospects."

This article examines the economic importance of international tourism to the Chinese economy, and the prospect of China becoming a major international tourism market. After decades of rapid economic growth, economic reforms and rising incomes, China could become one of the world's largest sources of international tourists by 2020, as well as a market of more than 1.2 billion potential consumers. The article also briefly describes Chinese travel to Canada.

*The spring 2002 issue of **Travel-log** (Internet: 87-003-XIE, $5/$16; paper: 87-003-XPB, $13/$42) is now available. For more information, contact Monique Beyrouti (613-951-1673; monique.beyrouti@statcan.ca) or Client Services (1-800-307-3382; cult.tourstats@statcan.ca), Culture, Tourism and the Centre for Education Statistics.*

More than one-third of total consumer retail spending on vehicles and gas

Consumer spending in retail stores increased for all major commodities in 2001. Overall, consumers spent 4.5% more in retail stores in 2001, despite worries of an economic slowdown. However, this was the weakest annual gain since 1998. Total sales in 2001 hit $290.5 billion.

Total retail spending on new and used cars and trucks as well as parts, services, gasoline and oil hit $105.9 billion in 2001, up 3.7% from 2000. This represented more than one-third of total retail spending in stores. Consumers spent $63.9 billion on food and beverages, up 3.4%. This accounted for about one-fifth of total spending.

Retailers sold just under $21.0 billion worth of health care and personal products, such as cosmetics, prescription and over-the-counter drugs, vitamins, eyewear and other toiletries, up 9.0% from 2000. This was the highest annual increase of all the major commodity groups.

Higher prescription drug prices explain only part of the annual increase in spending on health and personal care products. Within this category, sales of prescription drugs rose 10.9% from 2000. Sales of non-prescription drugs, including vitamins and supplements increased 7.6%

Spending on home furnishings and electronics rose 6.9% to just under $23.0 billion. Although strong, the 2001 increase was lower than the annual increases of the previous three years.

Clothing, footwear and accessories sales hit $26.9 billion, up 2.9% in 2001, the weakest annual gain since the inception of the Quarterly Retail Commodity Survey in 1997. Spending on children's and infants' clothing was up 5.8%, followed by women's clothing (+4.1%). Spending on men's clothing fell 0.7%, the first decline since the survey started. Women spent almost twice as much ($11.5 billion) on clothing in 2001 as men did ($6.1 billion).

Consumers spent $78.9 billion in retail stores in the fourth quarter, up 5.5% from the fourth quarter of 2000. (Quarterly data have not been seasonally adjusted; all percentage changes are year-over-year).

The fourth quarter increase was stronger than the annual year-over-year growth and was largely due to strong sales of motor vehicles, parts and services and home furnishings and electronics. Incentive programs for motor vehicles, a strong housing market and a possible stay-at-home effect after the events of September 11 helped to boost sales.

Within the home furnishings and electronics category, consumers spent 12.3% more on televisions and audio/video equipment, the largest year-over-year increase since the second quarter of 2000. Expenditures on health and personal care products were up 9.7% in the fourth quarter.

To order data, or for general information, contact the Client Services Unit (1-877-421-3067; 613-951-3549; retailinfo@statcan.ca). For analytical information, contact Ruth Barnes (613-951-6190; ruth.barnes@statcan.ca), Distributive Trades Division.

Retail sales, all stores
Not seasonally adjusted

	Q4 2000	Q3 2001	Q4 2001p	Q4 2000 to Q4 2001
	$ millions			% change
All commodities	**74,818**	**73,534**	**78,923**	**5.5**
Food and beverages	16,434	16,452	16,997	3.4
Health and personal care products	5,330	5,158	5,846	9.7
Clothing, footwear and accessories	8,682	6,523	8,879	2.3
Home furnishings and electronics	6,873	5,635	7,537	9.6
Motor vehicles, parts and services	18,573	21,204	20,816	12.1
Automotive fuels, oils and additives	5,884	5,756	4,912	-16.5
All other goods and services	13,042	12,806	13,936	6.9

p *Preliminary data.*

Manufacturing sector recovery continues

Driven by the resurgence of the motor vehicle industry, manufacturing shipments rose 0.8% to $42.1 billion in February. This followed a 3.2% surge in January and was the first back-to-back monthly gain in two years.

Recent gains in employment, signs of recovering industrial demand and stronger consumer confidence were early indications of an improving manufacturing sector.

February's rise was concentrated in the motor vehicle industry. Shipments of motor vehicles, which had fallen in December and January, jumped 9.1% to $5.5 billion in February, the highest level since May 2001. Shipments recovered strongly as several plants returned to more normal production levels, following slowdowns and temporary shutdowns.

Also, improved consumer confidence, encouraged by low interest rates, employment gains and manufacturers' incentive programs propelled the sales of new motor vehicles to record levels in December and January.

Manufacturers' shipments, February 2002
Seasonally adjusted

	$ millions	% change, previous month
Canada	**42,092**	**0.8**
Newfoundland and Labrador	183	-2.9
Prince Edward Island	107	-0.9
Nova Scotia	713	2.8
New Brunswick	895	-4.0
Quebec	10,022	0.4
Ontario	22,570	1.3
Manitoba	957	-2.0
Saskatchewan	584	-6.2
Alberta	3,254	-0.7
British Columbia	2,801	4.7
Yukon, Northwest Territories and Nunavut	5	22.8

Excluding the impact of the motor vehicle industry, total shipments decreased 0.3%. Wood products (+6.0%) and fabricated metal products (+3.4%) also contributed to the increase. February's advance was not as wide-ranging as January's; only 11 of 22 industries, representing 71% of total shipments, reported higher values.

As well, for the ninth consecutive month, manufacturers continued to draw down their inventories. Although they slipped just 0.1% to $62.0 billion in February, inventories were at their lowest since May 2000.

Unfilled orders rose for the first time in six months, another sign that the manufacturing sector may be emerging from its recent slump. Unfilled orders increased 0.5% to $46.7 billion. Throughout 2001, weak demand and market uncertainty contributed to a shortfall in unfilled orders. In February, new orders rose 2.2% to $42.3 billion, the third increase in four months.

With new orders at their highest since the summer of 2001, manufacturers were hiring again. According to the Labour Force Survey, nearly 100,000 manufacturing jobs were created in the first quarter of 2002. Employment in manufacturing rose 13,400 in March, following significant advances of 61,600 in February and 24,600 in January.

The inventory-to-shipment ratio dropped for the second straight month in February to 1.47. Higher shipments, countered by gradually decreasing inventories, contributed to the decline. This was the lowest ratio since January 2001.

New orders gained 2.2% in February to $42.3 billion, the second successive increase, and the highest level since July 2001. New orders had been generally declining since late 2000, but showed signs of renewal in February.

*The February 2002 issue of the **Monthly Survey of Manufacturing** (Internet: 31-001-XIB, $15/$147) will be available soon. For general information, 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.)*

New house prices jump to highest levels in twelve years

Prices for new houses rose 0.7% in February from January, the highest monthly increase since January 1990. Compared with February 2001, the index of contractors' selling prices increased 3.2%, the largest 12-month advance since May 1990.

Monthly rises occurred in 16 of the 21 urban centres surveyed. The largest monthly increase was in Edmonton, due to higher costs for material and labour.

St. John's saw a monthly increase of 1.2%, followed by Regina (+1.0%). In both cities, home-builders cited higher costs for building materials as the reason for the advance. Toronto's index rose 1.0%, but this was due mainly to the robust market for new housing.

Hamilton registered a 0.7% advance because of higher building costs, as well as a healthy new-home market. Windsor's land prices were up, increasing the index by 0.6%, and Québec's 0.6% gain was due to higher material costs.

Calgary's increase again reflected a labour shortage, as well as higher lot prices in new areas of development. Montreal builders cited material and labour cost hikes. Ottawa-Gatineau saw a very good market, fuelled by pent-up demand, low interest rates and few rental units.

Charlottetown's index rose 0.4%, largely because of higher lot prices in new developments. The increases in Vancouver and the New Brunswick cities reflected good housing markets and Winnipeg's index was driven by higher building costs.

On an annual basis, Ottawa-Gatineau still leads the way with the largest 12-month increase for new homes. Edmonton, Calgary and Montreal followed. There were no annual decreases in February.

New Housing Price Index

	January to February 2002	February 2001 to February 2002
	% change	
Canada	**0.7**	**3.2**
House only	1.0	4.4
Land only	0.1	0.9
St. John's	1.2	3.4
Halifax	-	3.0
Charlottetown	0.4	0.7
Saint John-Moncton-Fredericton	0.2	2.2
Québec	0.6	2.3
Montreal	0.5	3.7
Ottawa-Gatineau	0.5	5.8
Toronto	1.0	3.1
Hamilton	0.7	3.1
St. Catharines-Niagara	-0.5	2.0
Kitchener-Waterloo	0.1	2.9
London	-	3.5
Windsor	0.6	0.6
Sudbury-Thunder Bay	-	0.7
Winnipeg	0.2	2.1
Regina	1.0	3.2
Saskatoon	-	2.3
Calgary	0.5	4.0
Edmonton	1.5	4.8
Vancouver	0.2	2.8
Victoria	0.1	0.7

- *Nil or zero.*

The first quarter 2002 issue of ***Capital expenditure price statistics*** *(paper: 62-007-XPB, $24/$79) will be available in June.*
For more information, contact Ian Marrs (613-951-3350;infounit@statcan.ca) or Anne Williamson (613-951-2035; willann@statcan.ca), Prices Division.

A statistical profile of persons working in justice-related professions

The new report, *A statistical profile of persons working in justice-related professions in Canada*, 1996, uses census data from 1996 and 1991 to provide a statistical profile of the estimated 304,000 people who work in justice-related professions in Canada.

It contains a general description of characteristics such as age, highest level of schooling, average employment income and employment status. In addition, it provides detailed information on certain groups for which national data were available, including women and men, Aboriginal people, visible minorities and immigrants.

A statistical profile of persons working in justice-related professions in Canada*, 1996 (Internet: 85-555-XIE, $25) is now available.*
For more information, contact Information and Client Services (1-800-387-2231; 613-951-9023), Canadian Centre for Justice Statistics.

Graduates drawn towards self-employment

Graduates appear to be drawn towards self-employment rather than pushed into it due to an absence of other options.

The research paper *Setting up shop: self-employment amongst Canadian college and university graduates* documents patterns of self-employment among four groups of post-secondary graduates (college, bachelor's, master's, doctorate) in the five years following their graduation.

Rates of self-employment were relatively stable for the first three cohorts of graduates — those who finished their programs in 1982, 1986 and 1990. For these graduates, self-employment rates two years after graduation ranged from 6.5% to 7.8% for men, and from 3.2% to 5.2% for women. Five years after graduation, the range had increased to between 9.9% and 11.1% among men, and between 5.3% and 6.7% among women.

Self-employment rates were generally higher for male graduates than female graduates. At the doctorate level, however, the gender pattern reverses. Among 1995 doctoral graduates, 13.3% of women were self-employed in 1997, almost double the percentage of men with doctorates (6.9%).

Self-employment status is generally associated with enhanced labour market outcomes rather than a limited availability of regular paid positions. For example, self-employed graduates tended to report higher earnings, closer job-education job matches and greater work satisfaction than did paid workers. Individuals are drawn towards self-employment even as employment rates improve over their early post-graduation careers.

The research paper ***Setting up shop: Self-employment amongst Canadian college and university graduates****, no. 183 (Internet: 11F0019MIE, free) is now available on Statistics Canada's website (www.statcan.ca). From the* Our products and services *page, choose* Research papers (free), then Social conditions. *For more information, contact Ross Finnie (613-951-3962; ref@qsilver.queensu.ca), Business and Labour Market Analysis Division.*

Perspectives on labour and income

The April 2002 issue of *Perspectives on labour and income*, available today, features two articles.

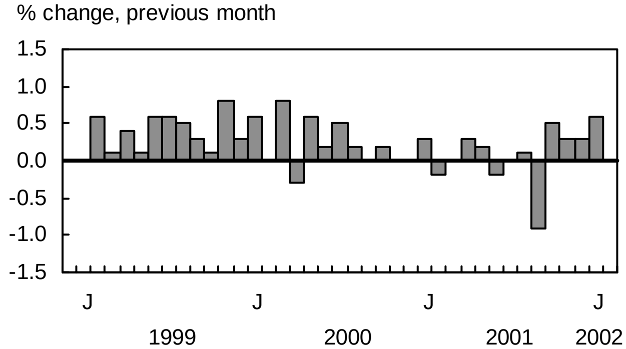
"Duration of multiple jobholding" looks at the length of time people work at more than one job. Is the situation temporary or a career choice? For more information, contact Katherine Marshall (613-951-6890; katherine.marshall@statcan.ca), Labour and Household Surveys Analysis Division.

"High-tech boom and bust" uses the Labour Force Survey to examine the recent declines in employment in the computer and telecommunications sector, a subset of the information and communication technology sector. For more information, contact Geoff Bowlby (613 951-3325; geoff.bowlby@statcan.ca), Labour Statistics Division.

The April 2002 online edition of ***Perspectives on labour and income*** *(Internet: 75-001-XIE, $5/$48) is now available. For more information, contact Henry Pold (613 951-4608; henry.pold@statcan.ca), Labour and Household Surveys Analysis Division.*

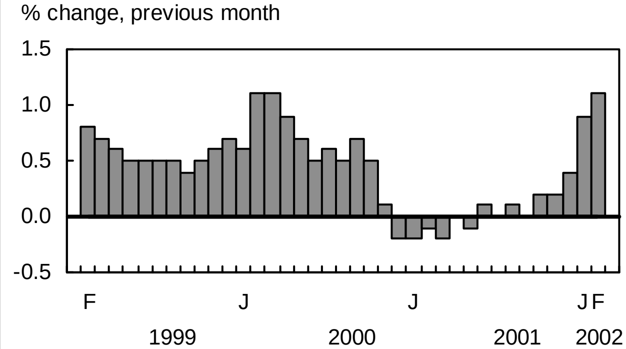
Current trends

Gross domestic product



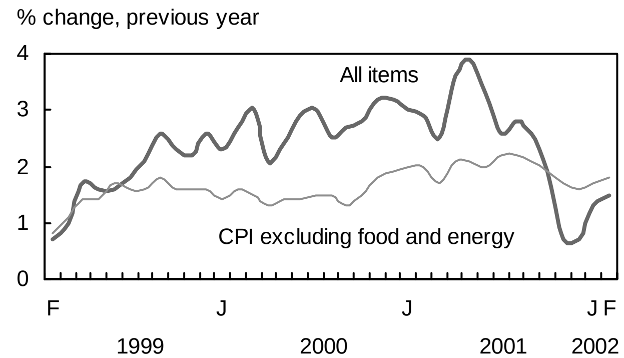
Total economic activity advanced 0.6% in January, after rising 0.3% in December.

Composite index



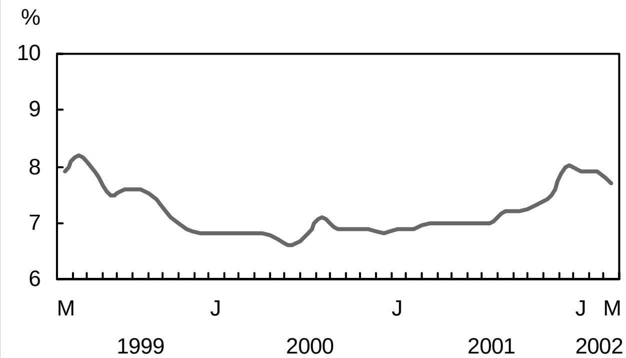
The leading indicator gained 1.1% in February. Household demand continued to accelerate, while manufacturing lagged.

Consumer price index



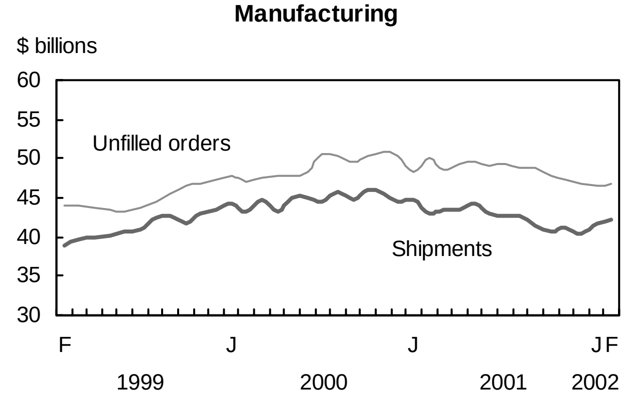
Consumer prices for goods and services were 1.5% higher in February than they were a year earlier. Excluding food and energy, prices rose 1.8%.

Unemployment rate



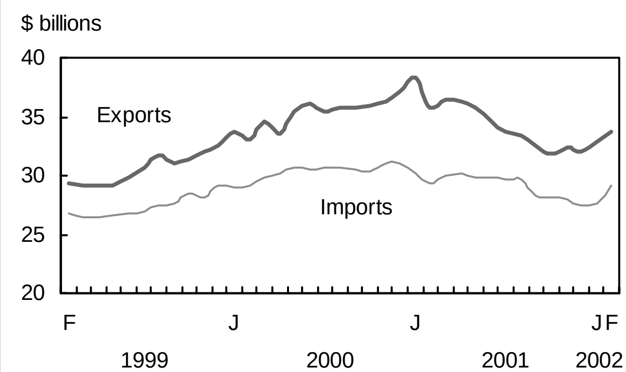
In March, the unemployment rate fell 0.2 percentage points to 7.7%.

Manufacturing



Manufacturers' shipments increased 0.8% in February to $42.1 billion. The backlog of unfilled orders rose 0.5% to $46.7 billion.

Merchandise trade



In February, the value of merchandise exports rose 2.7% to $33.7 billion. Imports climbed 5.1% to $29.1 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]	January	948.4	0.6%	1.0%
Composite Index (1992=100)	February	170.9	1.1%	2.6%
Operating profits of enterprises ($ billions)	Q4 2001	33.8	-5.6%	-29.9%
Capacity utilization rate (%)[2]	Q4 2001	80.3	-1.2†	-4.8†
DOMESTIC DEMAND				
Retail trade ($ billions)	January	25.3	1.1%	6.4%
New motor vehicle sales (thousands of units)	February*	146.4	-0.4%	17.2%
Wholesale trade ($ billions)	January	33.3	2.0%	3.0%
LABOUR				
Employment (millions)	March	15.3	0.6%	1.3%
Unemployment rate (%)	March	7.7	-0.2†	0.7†
Participation rate (%)	March	66.6	0.2†	0.5†
Average weekly earnings ($)	January	671.78	0.14%	1.74%
Help-wanted Index (1996=100)	March	126	1.6%	-25.0%
Regular Employment Insurance beneficiaries (in thousands)	January	559.2	0.4%	15.1%
INTERNATIONAL TRADE				
Merchandise exports ($ billions)	February*	33.7	2.7%	-5.9%
Merchandise imports ($ billions)	February*	29.1	5.1%	-0.7%
Merchandise trade balance (all figures in $ billions)	February*	4.5	-0.5	-1.9
MANUFACTURING				
Shipments ($ billions)	February*	42.1	0.8%	-1.8%
New orders ($ billions)	February*	42.3	2.2%	-5.3%
Unfilled orders ($ billions)	February*	46.7	0.5%	-6.9%
Inventory/shipments ratio	February*	1.47	-0.02	-0.05
PRICES				
Consumer Price Index (1992=100)	February	116.9	0.6%	1.5%
Industrial Product Price Index (1997=100)	February	106.4	0.3%	-1.4%
Raw Materials Price Index (1997=100)	February	105.1	2.2%	-12.3%
New Housing Price Index (1992=100)	February	108.3	0.7%	3.2%

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.*

Infomat
A weekly review

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Products released from April 11 to 17, 2002

SUBJECT AREA Title of product	Period	Catalogue number	Price ($) (issue/subscription)
CANADIAN CENTRE FOR JUSTICE STATISTICS			
A statistical profile of persons working in justice-related professions in Canada	1996	85-555-XIE	25
Criminal prosecutions personnel and expenditures	2000/01	85-402-XIE	23
CULTURE, TOURISM AND THE CENTRE FOR EDUCATION STATISTICS			
Travel-log	Spring 2002	87-003-XIE	5/16
Travel-log	Spring 2002	87-003-XPB	13/42
INDUSTRIAL ORGANIZATION AND FINANCE			
Quarterly financial statistics for enterprises	Q4 2001	61-008-XIE	26/86
INTERNATIONAL TRADE			
Exports by commodity	January 2002	65-004-XMB	37/361
Exports by commodity	January 2002	65-004-XPB	78/773
LABOUR AND HOUSEHOLD SURVEYS ANALYSIS			
Perspectives on labour and income	April 2002	75-001-XIE	5/48
MANUFACTURING, CONSTRUCTION AND ENERGY			
Industrial chemicals and synthetic resins	February 2002	46-002-XIB	5/47
Natural gas transportation and distribution	November 2001	55-002-XIB	13/125
Particleboard, oriented strandboard and fibreboard	February 2002	36-003-XIB	5/47
Primary iron and steel	February 2002	41-001-XIB	5/47
Production and shipments of steel pipe and tubing	February 2002	41-011-XIB	5/47
Shipments of office furniture products	December 2001	35-006-XIB	11/21
Steel wire and specified wire products	February 2002	41-006-XIB	5/47
SCIENCE, INNOVATION AND ELECTRONIC INFORMATION			
Federal scientific activities	2001/02	88-204-XIE	35
Science statistics		88-001-XIB	6/59

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Visit Statistics Canada anytime at *www.statcan.ca.* Click on "Our products and services" to access the CANSIM database. Or consult the tables in "Canadian statistics".