



Infommat

A Weekly Review

Friday, April 23, 1999

OVERVIEW

◆ **Manufacturers' shipments: Growth levels off**

With a decline in February, the upward trend of manufacturers' shipments levelled off. After increasing strongly last fall, shipments began slowing in December and January.

◆ **Lower sales of new vehicles**

New motor vehicle sales fell in February, as sales of cars and trucks both declined. Even so, North American-built cars gained market share.

◆ **Department store sales fall**

In February, department store sales fell from January by 2.6%.

◆ **Large retailers post strong increases**

Except for food and beverages, all the major product lines sold by large retailers made strong year-to-year sales increases in January.

◆ **Robust growth in the service sector**

The Key Services Indicators for the fourth quarter of 1998 showed robust growth in the service sector. In particular, rapid rates of job growth were observed among carriers and other telecommunications services, computer services and accounting services.

◆ **Family income near 1994 level**

In 1997, most families experienced some improvements in earnings. But lower interest rates cut into investment income, while transfer payments continued to decline. Fewer children and fewer seniors lived in low-income families.

Manufacturers' shipments: Growth levels off

Manufacturers' shipments fell for a second consecutive month in February, slipping 0.4% to \$39.1 billion. With February's decline, the upward trend of manufacturers' shipments has levelled off. Shipments increased strongly last fall, and then slowed in December and January. February's decline was led by aircraft and parts and by tobacco products. Excluding these two industries, shipments increased 0.5%. Unfilled orders were up strongly, while inventories rose slightly.

Shipments decreased in 6 of the 22 major groups. These six groups represented 36.2% of the total value of shipments. Despite the fact that shipments rose in 16 industries—particularly in railroad rolling stock (+21.5%), primary metals (+2.4%) and machinery (+3.9%)—the increases were outweighed by the declines in tobacco products and in aircraft and parts.

The largest contributor to February's decrease was the aircraft and parts industry (-21.0%). This returned the industry's shipments to more typical levels after January's strong 10.7% increase, which was supported by strong exports to the United States and Europe.

The next largest decline was in the tobacco products industry, where shipments fell sharply (-35.9%). This was confirmed by the

Manufacturers' shipments, February 1999

Seasonally adjusted

	\$ millions	% change, previous month
Canada	39,053	-0.4
Newfoundland	162	8.9
Prince Edward Island	79	-0.3
Nova Scotia	539	-2.3
New Brunswick	646	0.7
Quebec	8,933	-4.2
Ontario	21,830	0.8
Manitoba	894	-1.0
Saskatchewan	492	2.4
Alberta	2,576	1.5
British Columbia	2,899	0.0
Yukon and Northwest Territories	3	-2.4

(continued on page 2)



... Manufacturers' shipments: Growth levels off

Production and Disposition of Tobacco Products Survey, which reported that the volume of cigarette shipments dropped 19% in February, following a significant increase (+31.6%) in the value of January's shipments. The January increase was attributed to an anticipated tax increase on tobacco products in the federal budget. When the tax increase did not occur, the demand for cigarettes slackened in February, as distributors moved to reduce inventories.

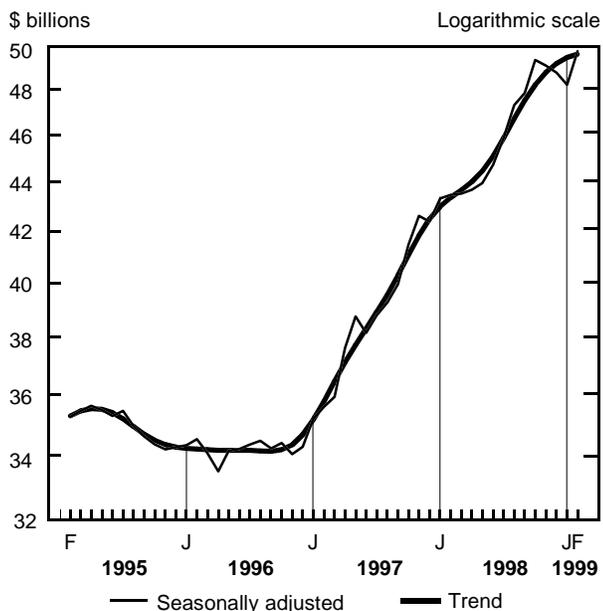
Manufacturers' backlog of unfilled orders climbed to \$49.8 billion in February, up 3.2%. This marked a rebound after three months of decline. February's largest increase in unfilled orders was in the aircraft and parts (+10.3%) industry. Modest gains were recorded in the motor vehicle (+2.4%) and machinery (+2.4%) industries. The trend in unfilled orders has been growing

Note to readers

Unfilled orders are often considered a key determinant of future shipments, assuming orders are not cancelled.

New orders are orders received, whether shipped in the current month or not. They are measured as the sum of shipments for the current month plus the change in unfilled orders. Interpreting new orders as leading to future demand is inappropriate because new orders include orders already shipped. The month-to-month change in new orders may be volatile, particularly if the previous month's change in unfilled orders was large in relation to the current month's change. Not all orders translate into Canadian factory shipments because some large orders may have a component that is subcontracted out to other countries.

Unfilled orders



steadily over the past two years, but it has been concentrated in the aircraft and parts industry. In this industry, orders can be stretched out over a number of years before they are completed.

Inventories grew 0.1% to \$49.6 billion. The increase was concentrated in the goods-in-process inventory, which rose 2.2% over January. In order of magnitude, the major industries contributing to February's increase in inventories were aircraft and parts (+4.4%), wood (+1.4%) and railroad rolling stock (+4.7%). The trend in total inventories has been on the rise since mid-1996 despite the declines observed over the past four months.

The inventory-to-shipments ratio rose modestly in February to 1.27, up from 1.26 in January. The ratio has declined dramatically after reaching a high of 1.42 last July. The trend of the ratio remained at historically low levels.

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

The February 1999 issue of *Monthly Survey of Manufacturing* (31-001-XPB, \$20/\$196) presents the detailed statistics. Detailed data on shipments by province are also now available on request. For further information, contact Craig Kuntz (613-951-7092; kuncrai@statcan.ca), Manufacturing, Construction and Energy Division. See also "Current trends" on page 7.

Lower sales of new vehicles

In February, 117,103 new motor vehicles were sold, a fall from January of 4.1%. Sales of both cars and trucks declined. February's drop in sales followed a strong 3.7% advance in January due to increased truck sales. New vehicle sales, which were 6.4% higher in February than they were a year earlier, have generally been declining since the spring of 1998.

Truck dealers saw almost all of January's strong 9.3% sales gain wiped out in February, when sales made a large 7.0% decline. Except for January, monthly truck sales have been slipping since last October. As for new cars, sales declined for a third straight month in February, falling 1.4%. However, sales were still 4.4% higher than in February 1998. New car sales have been levelling off since the spring of 1998.

Note to readers

Passenger cars include those used for personal and commercial purposes (such as taxis or rental cars). Trucks include minivans, sport-utility vehicles, light and heavy trucks, vans, coaches and buses.

New vehicles built in North America include those made or assembled in Canada, the United States or Mexico. All other new motor vehicles are considered imports (manufactured overseas).

For reasons of confidentiality, data for the Yukon and Northwest Territories are included with the British Columbia data. Unless otherwise noted, all figures are seasonally adjusted.

(continued on page 3)

... Lower sales of new vehicles

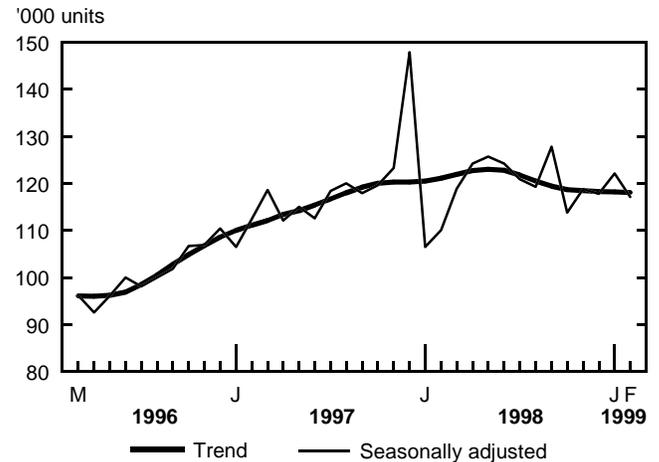
Sales of North American-built cars fell marginally from January to February (-0.1%), down to 50,195 units. However, this was still higher than in February 1998 by 8.8%. Over this one-year period, the market share of North American-built cars rose from 77% to 81%. The market share of North American-built cars had fallen below 80% for most of 1998. Meanwhile, the market share of North American-built trucks remained stable between February of 1998 and 1999 at 91%.

New vehicle dealers in Eastern Canada made the strongest sales gains in February. Unadjusted for seasonality, the strongest year-to-year advance was made by dealers in Newfoundland (+19.8%). Elsewhere in Atlantic Canada, sales of new vehicles advanced in New Brunswick (+9.2%) and Nova Scotia (+7.8%), but fell in Prince Edward Island (-5.0%). The other year-to-year declines in new vehicle sales occurred in Saskatchewan (-5.2%) and Quebec (-4.5%).

Available on CANSIM: matrix 64.

The February 1999 issue of *New motor vehicle sales* (63-007-XIB, \$13/\$124) can be downloaded from the Internet at www.statcan.ca. To order data, or for general information, contact Client Services (613-951-3549; 1 877 421-3067;

Sales of new motor vehicles



retailinfo@statcan.ca), Distributive Trades Division. For analytical information, contact Greg Peterson (613-951-3592; petegre@statcan.ca), Distributive Trades Division.

Department store sales fall

Department store sales fell 2.6% in February to \$1,463.7 million (seasonally adjusted). Sales in January 1999 totalled \$1,502.2 million. Department store sales were 2.7% higher this February than they were in February last year, when sales totalled \$1,425.3 million. Sales in department stores have generally been rising since the fall of 1998.

Compared with February 1998, department store sales rose in virtually every province in February 1999 (unadjusted for seasonality). The largest sales increases were made by stores in

Saskatchewan (+10.9%), Manitoba (+8.2%) and in Newfoundland and Prince Edward Island (+7.5). The only province where department store sales declined on a year-to-year basis was Quebec (-1.4%).

Available on CANSIM: matrices 111-113.

Accounts receivable data for department stores are also now available. To order data, or for general information, contact Client Services (613-951-3549; 1 877 421-3067, retailinfo@ststcan.ca). For analytical information, contact Greg Peterson (613-951-3592; petegre@statcan.ca), Distributive Trades Division.

Department store sales including concessions

Not seasonally adjusted

	February 1999	February 1998 to February 1999	January-February 1999	January-February 1998 to January-February 1999
	\$ millions	% change	\$ millions	% change
Canada	988.2	4.3	1,977.8	5.8
Newfoundland and Prince Edward Island ¹	18.4	7.5	36.0	8.7
Nova Scotia	27.7	1.5	55.9	4.8
New Brunswick	20.2	2.6	40.4	3.0
Quebec	175.8	-1.4	362.0	5.2
Ontario	423.4	6.3	846.1	7.6
Manitoba	41.5	8.2	81.9	5.4
Saskatchewan	33.7	10.9	67.1	9.3
Alberta	120.1	7.1	235.3	5.8
British Columbia, Yukon, Northwest Territories ¹	127.5	1.3	253.1	0.7

¹ For reasons of confidentiality, the data for Newfoundland and Prince Edward Island are combined, as are the data for British Columbia, the Yukon and the Northwest Territories.

Large retailers post strong increases

In January, the sales of Canada's large retailers hit \$5.1 billion, an increase from January 1998 of 6.4%. By comparison, over the same 12-month period, total retail sales excluding motor and recreational vehicle dealers rose 1.6%. Except for food and beverages (+2.2%), all the major product lines sold by the group of large retailers made strong year-to-year sales increases in January. (All data are unadjusted for seasonality.)

Of all the goods sold by the large retailers, the strongest sales growth in January was made by hardware and lawn and garden products (+19.4% from a year earlier). Most of that growth was sales of outdoor power equipment (such as snowblowers and garden tractors). In fact, the large retailers' sales of outdoor power equipment this January were more than double what they were a year earlier. The snowstorms that occurred this January were a factor.

Health and personal care products recorded the second largest year-to-year sales increase (+13.3%). Sales of prescription and over-the-counter drugs climbed 19.9% (+\$29 million). Drugs accounted for 45% of all the health and personal care products sold by the group of large retailers. Sales of personal care products (cosmetics and other toiletries) accounted for the majority of the category and advanced 8.1%.

The third highest sales growth was seen in housewares (+10.3%). For the most part, this was due to a year-to-year jump in the sales of household cleaning supplies, chemical and paper products (+\$21 million compared with January 1998). These products accounted for more than 50% of the sales within this category of goods.

Sales for the group of large retailers

Not seasonally adjusted

	January 1998	January 1999	January 1998 to January 1999
	\$ billions		% change
Commodities, total	4,755	5,061	6.4
Food and beverages	2,063	2,108	2.2
Health and personal care products	346	392	13.3
Housewares	232	256	10.3
Clothing, footwear and accessories	729	786	7.8
Home furnishings and electronics	614	669	9.0
Hardware and lawn and garden products	129	154	19.4
Sporting and leisure goods	165	181	9.7
All other goods and services	477	515	8.0

The large retailers also recorded a healthy advance in sales of sporting and leisure goods (+9.7%). Sales of pre-recorded audio and video tapes and discs expanded by \$6.3 million (+19.1%). Toy sales grew by \$4.5 million (+11.2%). Sporting goods sales advanced \$3.3 million (+6.0%). Higher year-to-year sales of ski equipment (\$2.5 million) and of exercise and fitness equipment (\$2 million) offset a drop in sales of hunting, fishing and camping supplies (down \$3.6 million).

To order data, or for general information, contact Client Services (1 877 421-3067; retailinfo@statcan.ca). For further analytical information, contact Veronica Utovac (613-951-0669), Distributive Trades Division.

Robust growth in the service sector

The service sector's workforce was 3.8% larger in the fourth quarter of 1998 than it was in the fourth quarter of 1997. In fact, the sector's employment growth rate was more than twice the rate in the goods sector. The service industries with the most rapid rates of job growth were carriers and other telecommunications services (+21.9%), computer services (+19.1%) and accounting services (+16.7%). Meanwhile, employment declined 13.1% in the insurance industry and fell 10.4% in the postal and courier services industry.

The service sector employed 385,000 more people in the fourth quarter of 1998 than it did in the same quarter of 1997. Of these, more than three-quarters (299,000) were working full-time positions. As well, some 95,000 of the new jobs involved self-employment.

Output (gross domestic product or GDP) in the service sector rose from the third to the fourth quarter of 1998 by 0.9% in real terms. This growth was slightly less than the robust 1.1% rate of

output growth posted in the goods sector. The growth in the service sector was particularly rapid in computer services (+6.3%), accommodation services (+4.1%) and broadcasting (+4.0%).

Consumer spending on services grew from the third to the fourth quarter at the same 0.9% rate as the service sector's output. Growth in consumer spending on transportation services and communications services was rapid at 4.5% and 2.5% respectively. Meanwhile, consumer prices for services slipped 0.1%, after having climbed by 0.7% for three straight quarters. Prices for traveller accommodations declined in the fourth quarter as usual, because the peak season ended and the winter rates began.

Canada's trade deficit in services rose slightly in the fourth quarter, from \$1.9 billion to \$2.0 billion, and was virtually the same as it was in the fourth quarter of 1997. Imports and exports of services both grew at a rapid 3.5% rate in the fourth quarter.

The fourth quarter 1998 issue of Services indicators (63-016-XPB, \$35/\$116; 63-016-XIB, \$26/\$87) is now available. For further information, contact Don Little (613-951-6739; littndon@statcan.ca), Services Division.

Family income near 1994 level

Average family income before taxes was \$57,146 in 1997, essentially unchanged from 1996 after adjusting for inflation. This left family income at virtually the same level it was in 1994. Moreover, it was down some \$2,700, or 4.5%, below the pre-recession peak of \$59,862 reached in 1989.

Despite this relative stability in family income, low-income rates declined. In 1997, an estimated 5.2 million people, or 17.5% of the population, were below Statistics Canada's low-income cutoffs. This compares with 17.9% in 1996 and 14.1% in the peak income year of 1989. The number of children in low-income situations also declined. In 1997, 1.4 million young people under 18 lived in low-income families, a decline from the previous year of about 100,000. They accounted for 19.8% of all young people in that age group, down from 21.1% in 1996 but still well above 1989's record low of 15.3%.

In terms of specific family types, two-parent families had average income in 1997 of \$64,814, virtually unchanged from 1996. However, for lone-parent families headed by women, average income climbed 4.1% to \$25,445, as higher employment earnings accompanied an increase in Child Tax Benefits. Young families (those in which the parent or primary breadwinner was under 25) are still at greatest risk for low income: They comprised only 4.0% of families overall in 1997, but represented 11.0% of the low-income families. The rate of low income among young families (42.8% in 1997) has followed an upward trend since 1980, when it was 20.4%. Throughout the 1990s, young workers have lagged behind their older counterparts in employment rates and in the proportion of jobs classified as full time.

Breaking down 1997 family income, employment earnings accounted for 79.7%, government transfers 11.3%, investment income 3.1%, and other income such as retirement pensions accounted for the remaining 5.9%. The trend of reduced transfer payments continued, particularly for employment insurance and social assistance. The proportion of family income coming from transfers has fallen for four consecutive years, down from a peak of 12.9% in 1993 to 11.3% in 1997.

Historically, labour market conditions have driven the changes in family income, since the largest component of family income by far is employment earnings. The labour market's performance was key to defining average incomes in 1997. Employment grew 1.9%, while average weekly hours increased 0.5% to 37.9 hours. As a result, families benefited from some improvements in earnings. At the same time, however, lower interest rates cut into investment income, while government transfer payments declined. The net effect was no real change in average family income in 1997.

In 1994, the last year of significant growth in family income, average weekly earnings rose an inflation-adjusted 1.7%. Since then, this average has essentially not changed. In 1997, it edged up just 0.5%, as the number of families increased 0.9% to 8.4 million. In a period of stagnant average weekly earnings and an increasing number of families, employment growth has been the key to maintaining average family income.

For the 20% of families with the lowest incomes, or the lowest "quintile", average family income was unchanged at \$17,559. Higher earnings helped to offset reduced transfer payments. Traditionally, this group has depended heavily on transfers—57% of their income in 1997, down from 59% in 1996. Female lone-parent families and those headed by seniors aged 65 and over made up 50% of the lowest quintile.

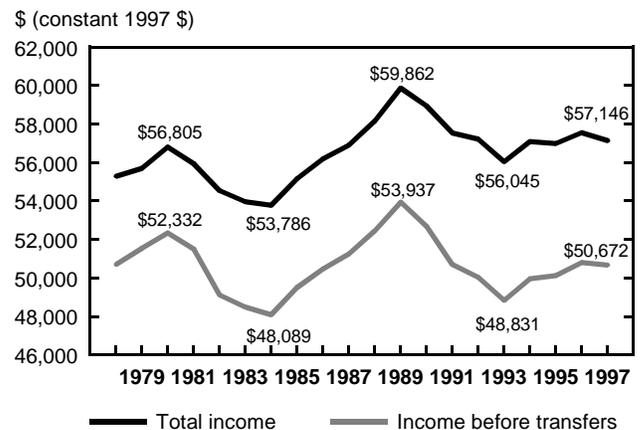
Note to readers

These income estimates came from the Survey of Consumer Finances, an annual supplement to April's Labour Force Survey. The sample of 35,000 households excludes those in the territories and on Indian reserves.

Total income refers to money receipts of families and individuals. This includes **transfers** (cash benefits from government programs), but it excludes income tax payments to the government. **Income before transfers** refers to total income minus transfers.

Estimates of the number of families and persons with low income are derived using Statistics Canada's low-income cutoffs (LICOs), 1992 base. These cutoffs were selected on the basis that families with an income below these limits usually spend more than 54.7% of their income on food, shelter and clothing. See Low income cut-offs (13-551-XIB, free). Statistics Canada has regularly and consistently emphasised that these LICOs are quite different from measures of poverty and that this Agency does not endorse their use as such.

Family income before tax



Families in the second quintile had an average income of \$34,124, also unchanged from the previous year. While their earnings increased, their investment income declined. Transfer payments were static. Two-parent families with children represented nearly one-third of this group, while one in four were seniors.

Families in the middle and fourth quintiles also experienced virtually no change in total income, at an average \$50,258 and \$68,939 respectively. However, families in the middle quintile recorded the largest increase in earnings, up \$1,463, reflecting the growth in employment during 1997.

The only families to incur a slippage in total income in 1997 were those in the highest quintile (-1.6% to \$114,846), primarily due to a dip in average employment earnings of \$1,043. Since incomes of the top quintile edged down slightly, income inequality did not increase in 1997. This was in contrast with the trend to increased inequality seen since the early 1990s (whether calculated on income before transfers or on total income before tax).

(continued on page 6)

... Family income near 1994 level

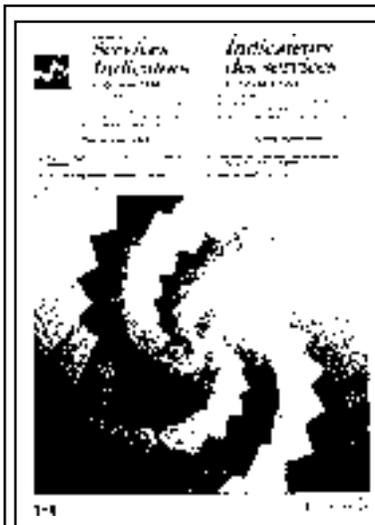
Despite 1997's decline in the number of children living in low-income families, the number was still 37% more than in 1989. In contrast, between 1989 and 1997, the total population of children grew only 6%. Children in a lone-parent family headed by a woman were almost five times more likely to be in a low-income situation than children in a two-parent family.

In 1997, an estimated 662,000 seniors aged 65 and over had low incomes, accounting for 18.7% of the population in this age group, down from 20.8% in 1996. This equalled the record low set in 1995. As the population of seniors swelled 63% between 1980 and 1997, the number of low-income seniors shrank 11%.

This markedly improved situation is due to higher transfer benefits combined with a growing proportion in receipt of pension benefits and annuities.

*Data on average annual income are available free on Statistics Canada's web site (www.statcan.ca), as are low-income statistics. Look under Canadian statistics, then The people—Families, households and housing, followed by Income. The publications **Income distributions by size in Canada, 1997** (13-207-XPB, \$46) and **Low-income persons, 1980-1997** (13-569-XIB, \$32) are now available. For further information, contact Client Services (613-951-7355 or 1 888 297-7355; fax: 613-951-3012; income@statcan.ca), Income Statistics Division.*

New from Statistics Canada



Services indicators Fourth quarter 1998

The fourth quarter 1998 issue of *Services indicators* features an article entitled "Room utilization in the traveller accommodation industry". It examines seasonal fluctuations experienced by Canada's traveller accommodation industry in 1996. It then focuses on monthly variations in hotel and motel occupancy rates, according to such factors as location, establishment size and market orientation. The summary measures yielded by this study also offer useful benchmarks against which individual hotels and motels can compare their own room-utilization figures.

Services indicators is a quarterly publication that profiles Canada's service industries. It contains 34 updated tables and about 100 charts showing various service industries' output, financial, employment and remuneration figures for the past eight quarters.

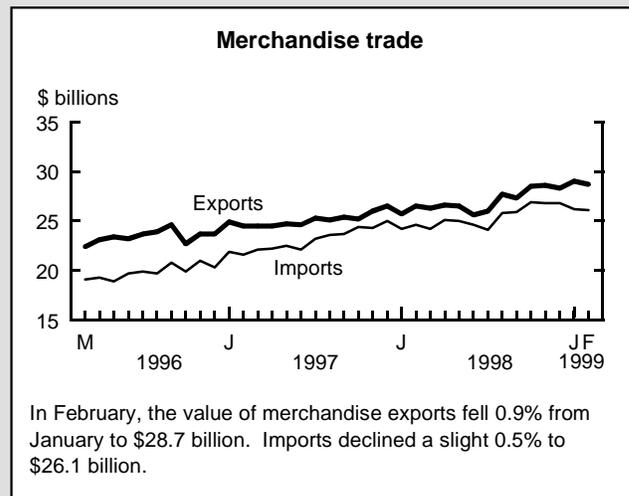
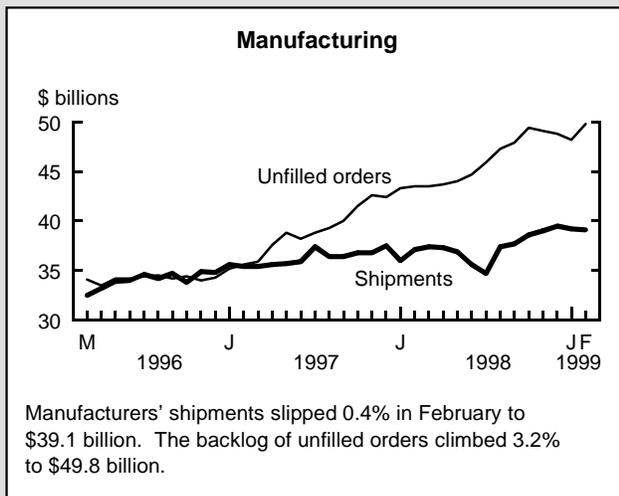
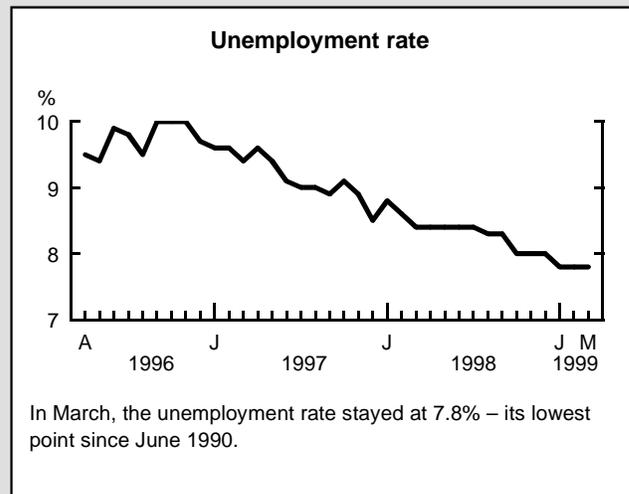
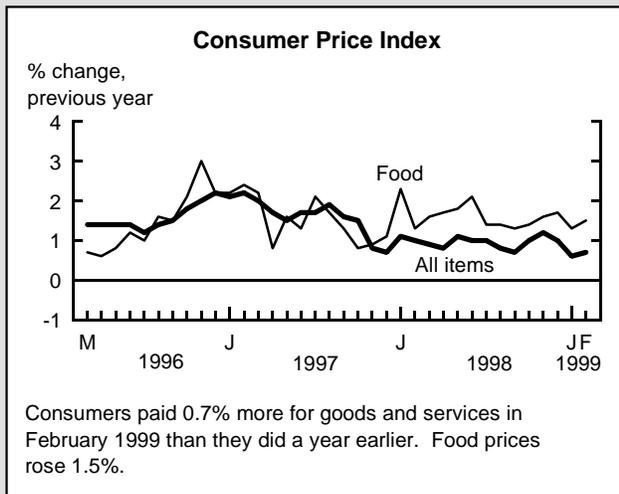
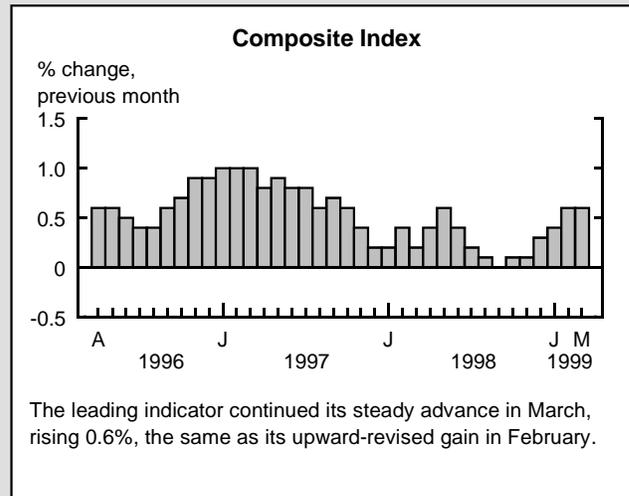
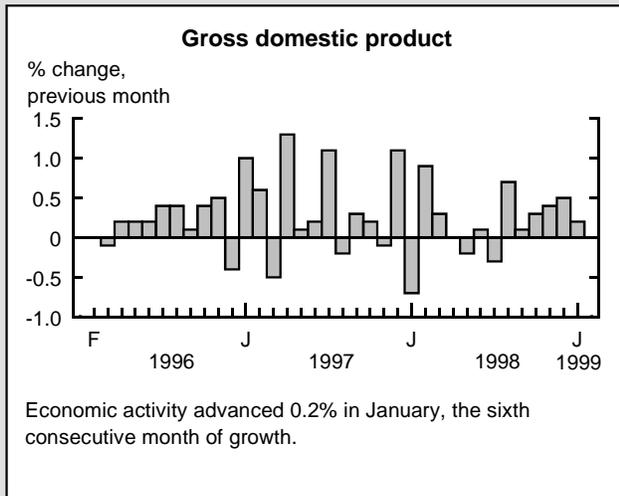
*The fourth quarter 1998 issue of **Services indicators** (63-016-XPB, \$35/\$116; 63-016-XIB, \$26/\$87) is now available. For further information, contact Don Little (613-951-6739; littidon@statcan.ca), Services Division.*

1996 Census catalogue Final edition

The final edition of the *1996 Census catalogue* contains definitive information about 1996 Census products and services. Labels identifying products as new or cancelled are used in this edition to highlight the differences between the first edition and the final edition.

*The final edition of the **1996 Census catalogue** (92-350-UIE, no charge) is now available as a downloadable publication on the Statistics Canada web site at www.statcan.ca. Look under "Products and services". For further information, contact your nearest Statistics Canada Regional Reference Centre.*

Current trends



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 (\$ billion, 1992)	January	730.1	0.2%	3.1%
Composite Index (1981=100)	March*	212.1	0.6%	4.1%
Operating profits of enterprises (\$ billion)	Q4 1998	28.7	15.1%	- 1.0%
Capacity utilization (%)	Q4 1998	82.5	0.7†	- 0.9†
DOMESTIC DEMAND				
Retail trade (\$ billion)	January	21.2	1.7%	5.1%
New motor vehicle sales (thousand of units)	February*	117.1	- 4.1%	6.4%
LABOUR				
Employment (millions)	March	14.64	- 0.2%	2.9%
Unemployment rate (%)	March	7.8	0.0†	- 0.6†
Participation rate (%)	March	65.6	- 0.2†	0.7†
Labour income (\$ billion)	January	39.3	- 0.2%	2.6%
Average weekly earnings (\$)	January	605.24	- 0.6%	- 0.2%
Help-wanted Index (1996=100)	March	148	0.0%	7.2%
INTERNATIONAL TRADE				
Merchandise exports (\$ billion)	February*	28.7	- 0.9%	8.4%
Merchandise imports (\$ billion)	February*	26.1	- 0.5%	6.0%
Merchandise trade balance (all figures in \$ billion)	February*	2.6	- 0.1	0.8
MANUFACTURING				
Shipments (\$ billion)	February*	39.1	- 0.4%	5.3%
New orders (\$ billion)	February*	40.6	5.0%	9.0%
Unfilled orders (\$ billion)	February*	49.8	3.2%	14.5%
Inventory/shipments ratio	February*	1.27	0.01	- 0.03
PRICES				
Consumer Price Index (1992=100)	March*	110.7	0.4%	1.0%
Industrial Product Price Index (1992=100)	February	119.4	- 0.4%	- 0.5%
Raw Materials Price Index (1992=100)	February	101.5	- 1.8%	- 10.3%
New Housing Price Index (1992=100)	February	100.3	0.0%	0.5%

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

* new this week

† percentage point

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A weekly review

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

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Publications released from April 15 to 21, 1999

Division/Title of publication	Period	Catalogue number	Price: Issue/Subscription	
			Canada (C\$)	Outside Canada (US\$)
DISTRIBUTIVE TRADES				
Retail chain and department stores	1997	63-210-XIB	30	
INDUSTRY MEASURES AND ANALYSIS				
Gross domestic product by industry	January 1999	15-001-XPB	15/145	15/145
LABOUR				
Quarterly estimates of trustee pension funds	Third quarter 1998	74-001-XPB	19/62	19/62
MANUFACTURING, CONSTRUCTION AND ENERGY				
Electric lamps, light bulbs and tubes	March 1999	43-009-XIB	5/47	
Gas utilities	December 1998	55-002-XPB	17/165	17/165
Primary iron and steel	February 1999	41-001-XIB	5/47	
Oil pipeline transport	January 1999	55-001-XPB	12/114	12/114
PRICES				
Construction price statistics	Fourth quarter 1998	62-007-XPB	24/79	24/79
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