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# Infomat

## A Weekly Review

Friday, May 9, 2003

## INSIDE

◆ **Manufacturers expect to decrease production**

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◆ **Value of building permits remains high despite drop in March**

The value of building permits issued across Canada declined 4.4% in March to $3.6 billion, after falling 11.7% in February. In spite of this, the storm of permits issued in January has left the sector buoyant and off to a record start, with first-quarter construction intentions amounting to $11.8 billion.

◆ **Manufacturers' prices falter**

Manufacturers' prices weakened in March, falling 0.5% after two consecutive months of growth. On an annual basis, the Industrial Product Price Index rose 1.3%, the smallest increase since September 2002. Raw materials prices were down 4.0% from February, but up 11.9% from March 2002.

◆ **Farmers intend to plant more wheat and canola**

After two years of difficult crop growing conditions, Canadian grain growers appear to be returning to proven planting formulas, as times remain uncertain in the agricultural grains sector. Data from the March Intentions Survey showed growers expect to plant less oats, barley and lentils in 2003, as they move back into wheat, canola and flaxseed.

## Economic expansion continues

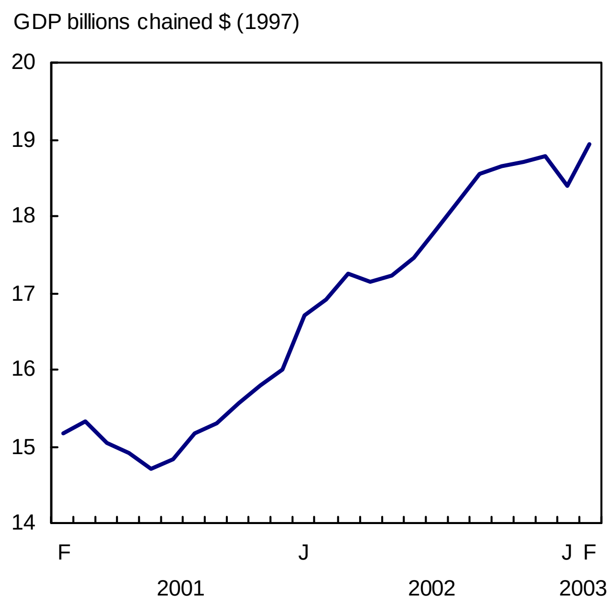
The economy moved ahead 0.2% in February, on the heels of a 0.5% surge in January. This was the seventeenth consecutive month that gross domestic product (GDP) increased. Residential construction and retail sales remained a major force underlying the upward trend. In February, lower production of motor vehicles and weaker mutual fund investment constrained GDP growth somewhat.

The housing boom returned as residential construction rebounded 3.0% after a drop in January, which resulted from three consecutive months of decline in housing starts. In February, housing starts shot up 33% to 246,400 units — a 15-year high.

Consumers continued to spend in February, pushing retail sales up 0.8%. However, the growth was narrowly focussed in motor vehicle dealers. Excluding those dealers, retail sales actually declined 0.4%. Furniture stores posted a second consecutive month of decline despite the housing boom. After strong gains in January,

*(continued on page 2)*

**Residential construction**

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**Economic expansion...** *(continued from page 1)*

wholesale trade edged up 0.2% in February, as wholesaling of household furniture fell significantly.

The index of industrial production (comprised of manufacturing, mining and utilities) declined slightly after a strong 0.8% showing in January. Lower output in manufacturing and utilities was largely offset by growth in the mining sector. South of the border, the US index of industrial production followed a similar pattern. Output of the US manufacturing sector in February was down 0.4%.

The weakness was widespread in manufacturing, as output declined 0.2% after a substantial gain in January. The weakness affected two-thirds of the major industry groups, but was centred in durable goods. Motor vehicle production, the key to this pattern, fell 2.2% after a 6.8% surge in January. The production of heavy trucks dropped sharply for a second month in a row.

Canada's pharmaceutical industry, after expanding more than 50% in the past two years, scaled output back to August levels in the past three months. Sawmill production declined for a fourth consecutive month, as exports fell in January and February. The strengthening Canadian dollar is making it increasingly difficult for Canadian producers — already facing a 27% tariff on softwood lumber exports to the United States — to remain competitive. Makers of information and communication technologies eased back for a fifth straight month, as global demand remained weak.

Extraction of crude oil and natural gas were both lower in February, but exploration increased, as drilling and rigging were significantly higher for a fourth consecutive month. Metal mining was hit by the closing of a uranium mine in Saskatchewan. Gold and iron output both rose. Diamonds pushed the output of non-metallic minerals higher. Canada now supplies more than 5% of the world's diamonds.

*The February 2003 issue of* ***Gross domestic product by industry*** *(Internet: 15-001-XIE, $11/$110) is now available. For more information, contact Hans Messinger (613-951-3621; hans.messinger@statcan.ca), Industry Measures and Analysis Division. (See also "Current trends" on page 6.)*

# Manufacturers expect to decrease production

Manufacturers are concerned with lower levels of new and unfilled orders and expect to decrease production in the next three months, according to new data from the Business Conditions Survey. Two key factors influenced manufacturers' intentions this quarter: global uncertainty and the rising Canadian dollar.

In April, 31% of manufacturers stated they would decrease production in the second quarter, whereas only 19% expected to increase production. Twelve of the 21 major industry groupings, representing 60% of manufacturing shipments, indicated a negative outlook for the second quarter. Mostly, the negative outlook was heard among producers in the transportation equipment, computer and electronic products and primary metals industries.

Regarding unfilled orders, 26% of manufacturers said their current backlog was lower than normal; only 7% said it was higher than normal. Eighteen of the major industries were pessimistic, led by the transportation equipment, computer and electronic products, primary metals and fabricated metal products industries.

Manufacturers were also preoccupied with the level of orders received. In April, 26% of manufacturers said orders were declining, compared with just 14% in January. Again, producers in the transportation equipment, computer and electronic products, primary metals and fabricated metal products industries were the most preoccupied.

Finished-product inventories are still not a major concern. In April, 81% of manufacturers reported that their current level of finished-products inventory was about right. However, 16% stated that inventories were too high.

The relatively large decline in production expectations and concerns with lower orders did not fully carry over into the employment prospects. Fully 82% of manufacturers said they would keep or add to their workforce in the second quarter, whereas 18% expected to reduce employment.

*For more information, contact Claude Robillard (613-951-3507; claude.robillard@statcan.ca), Manufacturing, Construction and Energy Division.*

**Manufacturers' expectations and business conditions**
Seasonally adjusted

| | April 2002 | July 2002 | October 2002 | January 2003 | April 2003 |
|---|---|---|---|---|---|
| | % of manufacturers who said | | | | |
| **Volume of production in next three months will be:** | | | | | |
| About the same as in previous three months | 55 | 69 | 66 | 63 | 50 |
| Higher | 27 | 20 | 17 | 23 | 19 |
| Lower | 18 | 10 | 17 | 14 | 31 |
| **Orders received are:** | | | | | |
| About the same | 57 | 60 | 55 | 71 | 65 |
| Rising | 25 | 22 | 27 | 15 | 9 |
| Declining | 17 | 18 | 18 | 14 | 26 |
| **Backlog of unfilled orders is:** | | | | | |
| About normal | 68 | 70 | 74 | 70 | 67 |
| Higher than normal | 13 | 14 | 8 | 12 | 7 |
| Lower than normal | 19 | 16 | 18 | 18 | 26 |
| **Finished-product inventory is:** | | | | | |
| About right | 80 | 80 | 78 | 83 | 81 |
| Too low | 5 | 6 | 5 | 4 | 3 |
| Too high | 15 | 14 | 18 | 13 | 16 |
| **Employment in next three months will:** | | | | | |
| Change little from previous three months | 74 | 72 | 72 | 74 | 69 |
| Increase | 12 | 13 | 13 | 13 | 13 |
| Decrease | 14 | 15 | 15 | 13 | 18 |

# Value of building permits remains high despite drop in March

The value of building permits issued across Canada declined 4.4% in March to $3.6 billion, after falling 11.7% in February. In spite of this, the storm of permits issued in January has left the sector buoyant and off to a record start, with first-quarter construction intentions amounting to $11.8 billion.

Municipalities issued $2.4 billion in residential permits in March, up 3.1% from February. Builders took out $680 million worth of permits for multi-family dwellings in March, up 26.6% from the 14-month low in February. In contrast, demand for single-family dwellings slipped 4.0% to $1.7 billion, the second straight monthly decline and the lowest monthly level since July 2002.

Even so, permits for single-family dwellings set a first-quarter record of nearly $5.4 billion, up 1.9% from the first quarter of 2002, in the wake of extremely strong levels in January. For multi-family permits, the first-quarter level reached $2.1 billion, up 21.4%.

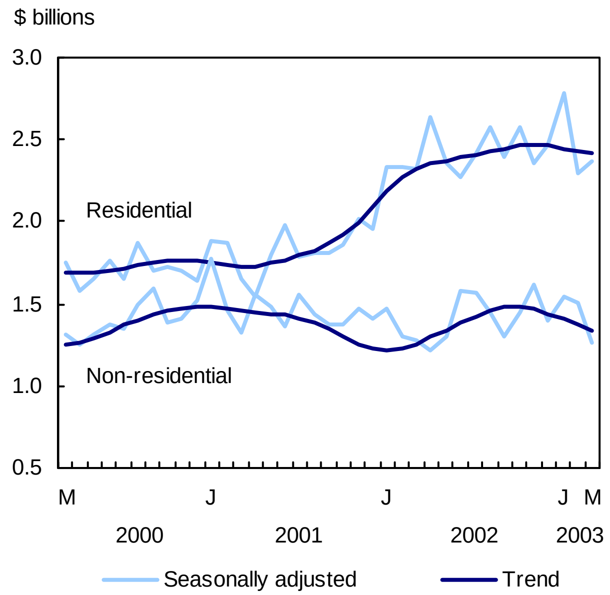
The biggest monthly gain in terms of dollar value for residential permits occurred in British Columbia (+48.7% to $437 million), primarily the result of proposed apartment construction, followed by Ontario (+3.0% to $994 million). The biggest decline was in Quebec (-9.0% to $462 million).

In March, the value of non-residential intentions fell 15.9% from February to $1.3 billion.

The commercial component was the only one to show an increase in the value of permits in March. Permits for commercial projects reached $685 million, up 7.8% from February, driven mainly by the hotel and restaurant and laboratory categories.

Institutional intentions plunged 43.7% to $296 million in March, the lowest level since April 2002. The medical category was the largest contributor to this decline, after a high level in February. Intentions for industrial construction declined 17.4% to $289 million, with manufacturing buildings showing the biggest drop.

**Value of building permits**




Among the provinces, decreases in the industrial and institutional components led Ontario to the largest drop in March in the non-residential sector (-30.0% to $564 million). In contrast, a large gain in the industrial component led Nova Scotia to March's strongest increase (+130.9% to $42 million).

For the first quarter, municipalities issued $4.3 billion in permits for the non-residential sector, up 6.6% from the same period of 2002. Most of the gain was related to increases in the commercial (+7.9%) and industrial (+24.1%) components. The institutional component recorded a 5.8% decline.

*The March 2003 issue of* ***Building permits*** *(Internet: 64-001-XIE, $14/$145) is now available. For more information, contact Erik Dorff (613-951-4901; erik.dorff@statcan.ca), Investment and Capital Stock Division.*

## Provincial distribution of federal expenditures on science and technology

The working paper *Provincial distribution of federal expenditures and personnel on science and technology* provides data in tabular format on federal regional spending on science and technology, including research and development, in the fiscal years 1994/95 to 2000/01.

In 2000/01, the federal government spent nearly $4.0 billion on science and technology, 34% of which was allocated to Ontario and 26% to Quebec. (This excludes funding for science and technology performed by the federal government in its own departments and agencies within the National Capital Region.) In addition, the federal government awarded $544 million in grants and contracts in natural sciences to Canadian industry in 2000/01. About 43% of the total was allocated to industries in Ontario, and 34% to those in Quebec.

*The working paper* ***Provincial distribution of federal expenditures and personnel on science and technology****, 1994/95 to 2000/01 (88F0006XIE2003008, free) is now available on Statistics Canada's website (www.statcan.ca). For more information, contact Lloyd Lizotte (613-951-2188; lloyd.lizotte@statcan.ca), Science, Innovation and Electronic Information Division.*

# Manufacturers' prices falter

Manufacturers' prices weakened in March, falling 0.5% after two consecutive months of growth. On an annual basis, the Industrial Product Price Index (IPPI) rose 1.3%, the smallest increase since September 2002.

Lower prices for motor vehicles and other transport equipment (-1.8%) were the major factor in the monthly decline of the IPPI. A decrease in lumber and other wood products was due mainly to falling demand for softwood lumber, coupled with higher inventories and declining prices for plywood. Primary metal products also fell. Higher prices for petroleum and coal products, chemical products, and meat, fish and dairy products partly offset these monthly decreases.

The petroleum and coal products group continued to be the major influence on the year-over-year growth in the IPPI, with an increase of 37.6%. If petroleum and coal product prices had been excluded, the IPPI would have declined 0.8% instead of increasing 1.3% on a year-over-year basis.

In addition to petroleum and coal products, price increases for chemical products, fruit, vegetable and feed products and primary metal products also contributed to the annual growth in manufacturers' prices. However, lower prices for motor vehicles and other transport equipment, lumber and other wood products, and electrical and communication products dampened the increase.

On a monthly basis, raw materials prices were down 4.0% from February. Mineral fuels were the major contributors to the monthly decrease in the Raw Materials Price Index (RMPI), with prices declining 6.7%. Crude oil prices were 8.3% lower in March than in February, mainly the result of increased production and a drop in demand with the arrival of more spring-like temperatures. Prices for vegetable products, non-ferrous metals and wood products were also lower in March than in February. Higher prices for animal products helped offset this monthly decrease.

**Industrial product and raw materials price indexes,**
March 2002

| | Index (1997=100) | % change, previous month | % change, previous year |
|---|---|---|---|
| **Industrial Product Price Index (IPPI)** | **108.8** | **-0.5** | **1.3** |
| IPPI excluding petroleum and coal products | 105.9 | -0.7 | -0.8 |
| Intermediate goods | 106.5 | -0.4 | 2.6 |
| Finished goods | 112.3 | -0.8 | -0.4 |
| **Raw Materials Price Index (RMPI)** | **124.0** | **-4.0** | **11.9** |
| RMPI excluding mineral fuels | 95.8 | -1.1 | 3.6 |
| Mineral fuels | 185.2 | -6.7 | 23.2 |
| Vegetable products | 98.2 | -3.5 | 9.1 |
| Animals and animal products | 109.2 | 0.9 | 1.2 |
| Wood | 85.6 | -1.8 | 7.1 |
| Ferrous materials | 96.6 | -1.1 | 6.9 |
| Non-ferrous metals | 81.3 | -2.8 | -2.3 |
| Non-metallic minerals | 115.2 | 0.5 | 5.6 |

Manufacturers paid 11.9% more for their raw materials than they did in March 2002. Higher prices for mineral fuels (+23.2%) were mainly responsible for this annual rise in the RMPI. Prices for wood products, vegetable products and animal products were also up on an annual basis. If mineral fuels had been excluded, the RMPI would have increased 3.6%.

*The March 2003 issue of **Industry price indexes** (Internet: 62-011-XIE, $17/$163; paper: 62-011-XPE, $22/$217) will be available soon. For more information, contact Danielle Gouin (613-951-3375; danielle.gouin@statcan.ca), Prices Division.*

## Farm Product Price Index

Prices received by farmers for their agricultural commodities increased 1.2% in February from February 2002, according to data from the Farm Product Price Index.

The livestock and animal products index was 4.5% below year-earlier levels. However, this index rose 0.8% from January, the fifth consecutive monthly increase. Higher prices for hogs more than offset the decrease in prices for cattle and calves.

On a month-to-month basis, the crop index was down 1.3% in February, as all the components recorded declines from January. However, the index stood 6.5% above the February 2002 level, as major grain, oilseed and special crop prices remained buoyed by two consecutive years of drought.

*The February 2003 issue of **Farm Product Price Index** (21-007-XIB, free) is now available on Statistics Canada's website (www.statcan.ca). For more information, contact Bernie Rosien (613-951-2441; bernie.rosien@statcan.ca), Agriculture Division.*

# Farmers intend to plant more wheat and canola

After two years of difficult crop growing conditions, Canadian grain growers appear to be returning to proven planting formulas, as times remain uncertain in the agricultural grains sector.

Data from the March Intentions Survey of 12,200 farmers showed growers expect to plant less oats, barley and lentils in 2003, as they move back into wheat, canola and flaxseed.

The commodity markets did not make farmers' planting choices easy. As the survey was being conducted, prices for most grains and oilseeds were depressed, and were expected to stay that way well into the new crop year. Potential competition from other grain-producing nations was also creating an uncertain market.

In addition, farmers in Alberta and Saskatchewan were grappling with fears of a third year of drought conditions. Concerns were also being expressed over the availability and quality of seed for planting, rising input costs for fuel and fertilizer and a threat to crops from insects, reported to be high this year in some parts of the country.

The acreage planted in canola is expected to increase by 1.3 million acres distributed over the three western provinces. In Saskatchewan alone, the canola acreage is expected to jump by 850,000 acres to 5.2 million acres. The anticipated gain in Alberta is 250,000 acres, and in Manitoba, 200,000 acres.

Farmers are expected to plant just under 19.0 million acres of spring wheat in 2003, down about 180,000 acres from June 2002. The decline is attributable to farmers in Alberta, who expect to plant 399,000 fewer acres in spring wheat than they did in June 2002.

Canada's durum wheat acreage is expected to slip 4.6% to less than 5.9 million acres. The main reason is the switch to spring wheat by Saskatchewan growers, who reported they will be planting 250,000 fewer acres of durum. Durum and spring wheat areas have followed a familiar pattern from year to year: when one goes up, the other goes down.

Nationally, farmers intend to plant just over 5.4 million acres of oats, down 8.6% from June 2002. Farmers also anticipate a lentil crop of less than 1.3 million acres, down 15.8%. Virtually the entire lentil crop is grown in Saskatchewan.

**Seeding intentions of major grains and oilseeds**

| Crop | 2002 | 2003 | 2002 to 2003 |
|---|---|---|---|
| | Thousands of acres | | % change |
| Total wheat | 26,291 | 26,405 | 0.4 |
| Spring wheat | 19,156 | 18,976 | -0.9 |
| Barley | 12,719 | 12,590 | -1.0 |
| Summerfallow | 10,290 | 10,040 | -2.4 |
| Canola | 9,614 | 10,942 | 13.8 |
| Durum wheat | 6,150 | 5,865 | -4.6 |
| Oats | 5,927 | 5,420 | -8.6 |
| Corn for grain | 3,211 | 3,228 | 0.5 |
| Dry field peas | 3,205 | 3,200 | -0.2 |
| Soybeans | 2,546 | 2,389 | -6.2 |
| Flaxseed | 1,710 | 1,825 | 6.7 |

The acreage in barley is expected to decline 1.0% to about 12.6 million. Alberta farmers will account for the decline. The acreage of dry field peas is expected to decline marginally to 3.2 million acres, still well above the five-year average; flaxseed acreage is anticipated to increase 6.7% to just over 1.8 million acres, solely the result of increased acreage in Saskatchewan.

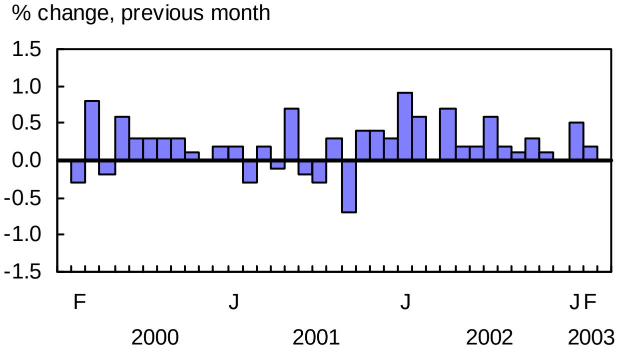
Farmers intend to seed almost 3.2 million acres of grain corn, up 0.5% from 2002's record level. Of this, Quebec farmers expect to plant just over 1.1 million acres, and Ontario farmers 1.9 million acres. The popularity of grain corn is based on its use as the primary ration ingredient for livestock feed in Ontario and Quebec, as well as in the expanding ethanol fuel industry.

Farmers in both provinces anticipate large declines in soybean acreage. In Ontario, the forecast decline is 8.4% to 1.9 million acres, and in Quebec, a 3.7% drop to 321,200 acres.

***March intentions of principal field crop areas, Canada**, 2003 (Internet: 22-002-XIB, $11/$66; paper: 22-002-XPB, $15/$88) is now available. For more information, contact Bill Parsons (613-951-8727; bill.parsons@statcan.ca) or Dave Roeske (613-951-0572; david.roeske@statcan.ca), Agriculture Division.*

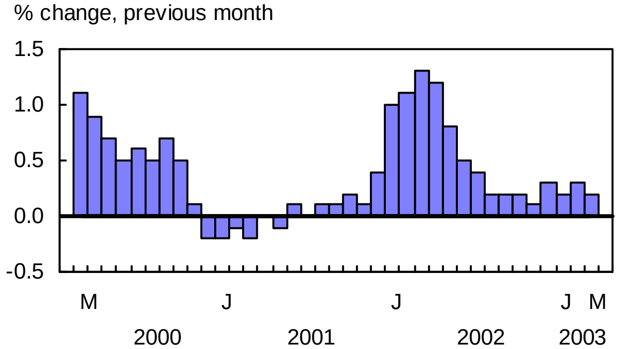
# Current trends

### Gross domestic product



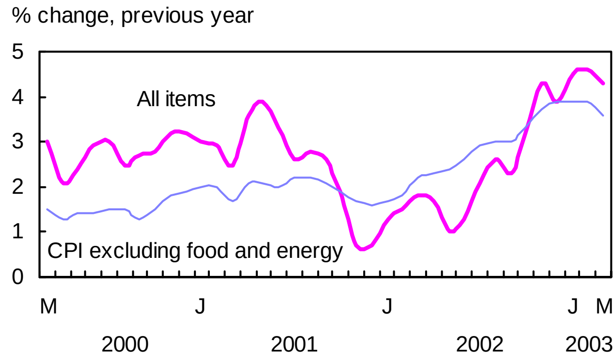

Total economic activity rose 0.2% in February, after a gain of 0.5% in January.

### Composite Index



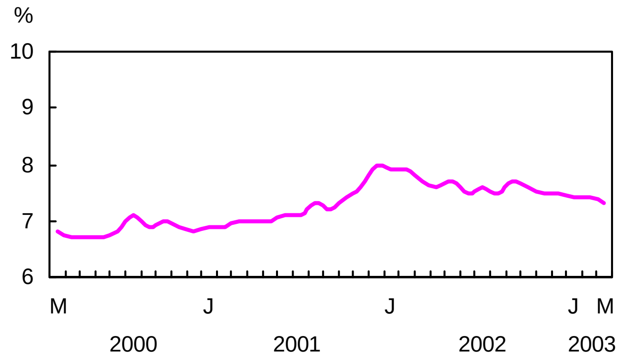

The leading indicator grew 0.2% in March after rising 0.3% in February.

### Consumer Price Index



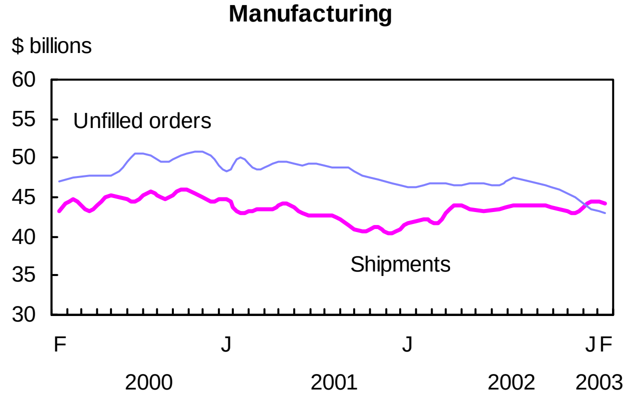

Consumer prices for goods and services were 4.3% higher in March than they were a year earlier. Excluding food and energy, prices rose 3.6%.

### Unemployment rate



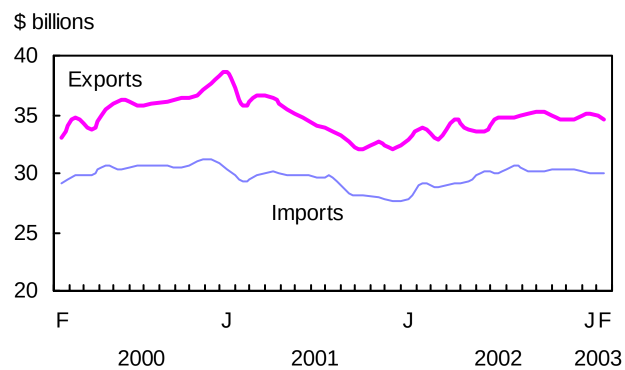

In March, the unemployment rate edged down 0.1 percentage points to 7.3%.

### Manufacturing




Manufacturers' shipments fell 0.9% in February to $44.2 billion. The backlog of unfilled orders declined 0.9% to $43.0 billion.

### Merchandise trade




In February, the value of merchandise exports fell 1.6% to $34.6 billion. Imports were unchanged at $30.0 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] | February | 996.7 | 0.2% | 3.3% |
| Composite Index (1992=100) | March | 181.2 | 0.2% | 4.7% |
| Operating profits of enterprises ($ billions) | Q4 2002 | 41.9 | 5.1% | 32.8% |
| Capacity utilization rate (%)[2] | Q4 2002 | 82.9 | -0.2† | 2.5† |
| **DOMESTIC DEMAND** | | | | |
| Retail trade ($ billions) | February | 26.5 | 1.5% | 5.2% |
| New motor vehicle sales (thousands of units) | February | 146.8 | 14.1% | 1.5% |
| Wholesale trade ($ billions) | February | 36.8 | -0.2% | 8.5% |
| **LABOUR** | | | | |
| Employment (millions) | March | 15.7 | 0.1% | 2.9% |
| Unemployment rate (%) | March | 7.3 | -0.1† | -0.4† |
| Participation rate (%) | March | 67.5 | 0.0† | 0.9† |
| Average weekly earnings ($) | February | 687.37 | 0.13% | 1.67% |
| Help-wanted Index (1996=100) | April* | 110.8 | -0.1% | -13.0% |
| Regular Employment Insurance beneficiaries (in thousands) | February | 531.3 | 0.3% | -4.2% |
| **INTERNATIONAL TRADE** | | | | |
| Merchandise exports ($ billions) | February | 34.6 | -1.6% | 2.0% |
| Merchandise imports ($ billions) | February | 30.0 | 0.0% | 2.8% |
| Merchandise trade balance (all figures in $ billions) | February | 4.6 | -0.6 | -0.1 |
| **MANUFACTURING** | | | | |
| Shipments ($ billions) | February | 44.2 | -0.9% | 4.7% |
| New orders ($ billions) | February | 43.7 | 1.6% | 2.7% |
| Unfilled orders ($ billions) | February | 43.0 | -0.9% | -7.6% |
| Inventory/shipments ratio | February | 1.44 | 0.02 | -0.04 |
| **PRICES** | | | | |
| Consumer Price Index (1992=100) | March | 122.8 | 0.4% | 4.3% |
| Industrial Product Price Index (1997=100) | March | 108.8 | -0.5% | 1.3% |
| Raw Materials Price Index (1997=100) | March | 124.0 | -4.0% | 11.9% |
| New Housing Price Index (1992=100) | February | 113.8 | 0.6% | 5.1% |

***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 Industry Classification System (NAICS), which has replaced the 1980 Standard Industrial Classification.*

# Infomat

## A weekly review

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# Products released from May 1 to 7, 2003

| SUBJECT AREA<br>Title of product | Period | Catalogue number | Price ($) (issue/subscription) |
|---|---|---|---|
| **AGRICULTURE** | | | |
| Hog statistics | 2003 | 23-010-XIE | free |
| **BALANCE OF PAYMENTS AND FINANCIAL FLOWS** | | | |
| Canada's international transactions in securities | February 2003 | 67-002-XIE | 14/132 |
| **HOUSING, FAMILY AND SOCIAL STATISTICS** | | | |
| Women in Canada: Work chapter updates | April 2003 | 89F0133XIE | free |
| **INDUSTRY MEASURES AND ANALYSIS** | | | |
| Gross domestic product by industry | February 2003 | 15-001-XIE | 11/110 |
| **INVESTMENT AND CAPITAL STOCK** | | | |
| Building permits | March 2003 | 64-001-XIE | 14/145 |
| **LABOUR STATISTICS** | | | |
| Annual estimates of employment, earnings and hours based on the North American Industrial Classification System | 1991-2002 | 72F0023XCB | 150 |
| Employment, earnings and hours | February 2003 | 72-002-XIB | 24/240 |
| New evidence on the determinant of training in Canadian business locations | | 71-584-MIE | free |
| New evidence on the determinant of training in Canadian business locations | | 71-584-MPE | 15 |
| **MANUFACTURING, CONSTRUCTION AND ENERGY** | | | |
| Asphalt roofing | March 2003 | 45-001-XIB | 5/47 |
| Energy statistics handbook | Q4 2002 | 57-601-XCB | 150 |
| Energy statistics handbook | Q4 2002 | 57-601-XIE | 35/100 |
| Particleboard, oriented strandboard and fibreboard | December 2002 | 36-003-XIB | 5/47 |
| Shipments of office furniture products | December 2002 | 35-006-XIB | 11/21 |
| **PRICES** | | | |
| Canadian International Development Agency post indexes | May 2003 | 62F0084XIE | free |
| Foreign service directives post indexes | May 2003 | 62F0082XIE | free |
| Military post indexes | May 2003 | 62F0085XIE | free |
| Post indexes for non-government organizations | May 2003 | 62F0083XIE | free |
| **SCIENCE, INNOVATION AND ELECTRONIC INFORMATION** | | | |
| Provincial distribution of federal expenditures and personnel on science and technology | 1994/95 to 2000/01 | 88F0006XIE2003008 | free |
| **SERVICE INDUSTRIES** | | | |
| Restaurant, caterer and tavern statistics | February 2003 | 63-011-XIE | 6/55 |
| **TRANSPORTATION** | | | |
| Monthly railway carloadings | February 2003 | 52-001-XIE | 8/77 |

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