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Infomat
A Weekly Review

Friday, May 19, 2000

OVERVIEW

- **Widespread rebound in shipments**
  In March, manufacturers' shipments rebounded sharply from February's decline, increasing 3.8%. Nearly all industries staged a rebound. Unfilled orders edged downward, while inventories swelled for a 14th month in a row.

- **Economy expected to maintain steady performance**
  The Short-term Expectations Survey reports that economic forecasters expect the pending March-to-June data to show that the economy's performance is holding steady.

- **Consumers return in force to vehicle dealers' showrooms**
  Sales of new motor vehicles climbed 6.5% in March. This followed declines in both January and February. Two-thirds of March's increase was ascribed to car sales.

- **Large retailers' sales climb across the board**
  In February, large retailers' sales reached $4.9 billion, an increase of 7.9% from a year earlier. Sales were up in all their major product lines.

- **Leasing and property management services: first data from a new survey**
  In 1997, just over three out of four (77%) of the firms providing real estate rental/leasing and property management services were located in Ontario, Quebec and British Columbia. Those located in Quebec and Ontario accounted for just over two-thirds of the industry's revenues.

- **Foreign control of corporations continues moderate growth**
  In 1997, foreign companies recorded a modest increase in their share of both corporate assets and corporate operating revenues in Canada. This continues an advancing trend seen in the 1990s that can be ascribed to the growth of exports, as well as to globalization.

Widespread rebound in shipments

In March, manufacturers' shipments rebounded sharply from February's decline, increasing 3.8% to $44.9 billion. Nearly all industries staged a rebound, but it was most pronounced in the automotive, electrical and electronic products and in refined petroleum and coal products. March was the fourth strong increase in five months, and it revitalised the strong upward trend in shipments that began in August 1998. Since the start of 2000, shipments have risen 3.5%. In March, they were 13.0% higher than in March 1999.

Shipments in March increased in 21 of the 22 major industries, representing 99.5% of the total value of shipments. Excluding the automotive sector, manufacturers' shipments increased 3.1%. The motor vehicles and the motor vehicle parts industries both rebounded from February's pause, rising 7.3% and 6.3% respectively. The electrical and electronic industry's advance (+6.5%) was concentrated in the computer industry. The gain in the refined petroleum and coal products industry (+7.7%) was partly due to a 3.0% increase in prices.

Manufacturers' backlog of unfilled orders decreased slightly in March (-0.3% to $53.9 billion), after slipping in both January and February. The backlog of unfilled orders has been hovering in the

Manufacturers' shipments, March 2000
Seasonally adjusted

	$ millions	% change, previous month
Canada	**44,886**	**3.8**
Newfoundland	160	-4.6
Prince Edward Island	86	6.0
Nova Scotia	722	0.6
New Brunswick	875	0.1
Quebec	10,513	3.0
Ontario	24,105	4.9
Manitoba	903	1.9
Saskatchewan	584	1.7
Alberta	3,464	4.5
British Columbia	3,472	3.5
Yukon, Northwest Territories and Nunavut	4	3.3

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... Widespread rebound in shipments

$54 billion range for six months. Mainly, the latest decline was ascribed to the transportation equipment industry (-0.4%). The largest increase in unfilled orders occurred in the primary metals industry (+6.4%).

Inventories rose 1.5% to $57.5 billion—the 14th consecutive monthly increase. The main contributors in March were aircraft and parts (+5.1%), food (+3.5%) and electrical and electronic products (+1.5%). The main offset in inventories was in the refined petroleum coal products industry (-3.5%), as some manufacturers depleted their reserves of crude oil. The inventory-to-shipments ratio fell to 1.28, returning to a level more consistent with the trend that has been firmly entrenched at 1.29 for nine months now.

The March 2000 issue of ***Monthly survey of manufacturing*** *(31-001-XPB, $20/$196) presents the full report. Detailed data on shipments by province are 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.*

Economy expected to maintain steady performance

The Short-term Expectations Survey reports that economic forecasters expect the pending March-to-June data to show that the economy's performance is holding steady.

Notably, the annual rate of inflation (as measured by the Consumer Price Index) is expected to hold steady in the short term. The analysts' average forecast for the annual inflation rate is 2.7% for April and 2.7% for May. In June, they expect that it will slow slightly to 2.6%. The actual inflation rate, meanwhile, came in slightly higher than their average forecast for March (2.6% versus the actual rate of 3.0%), whereas their April forcast was too high, since the actual rate was 2.1%.

At the time of the survey, the forecasters were predicting that the monthly growth rate in gross domestic product (GDP) for February would be 0.3%, followed by 0.4% for March and for April. In February, GDP actually declined slightly (-0.4%).

Note to readers

Responses to this monthly edition of the Short-term Expectations Survey of economic forecasters were obtained between April 19 and April 27.

The survey results suggest that the surplus in international merchandise trade will hover very close to the actual value of $3.9 billion observed for February. The average forecasts call for a $4.0 billion trade surplus for March and for May, and $3.9 billion for April.

No change is expected in the nation's unemployment rate, which remained stuck at 6.8% in March and in April. On average, the forecasters are expecting the unemployment rate to hold steady right through to June. Similarly the participation rate is expected to hold steady, at 65.8% in April (which it did) and at 65.9% in May and June.

For further information, or to order a set of tables, contact Jamie Brunet (613-951-6684; fax: 613-951-1572; jamie.brunet@statcan.ca), Small Business and Special Surveys Division.

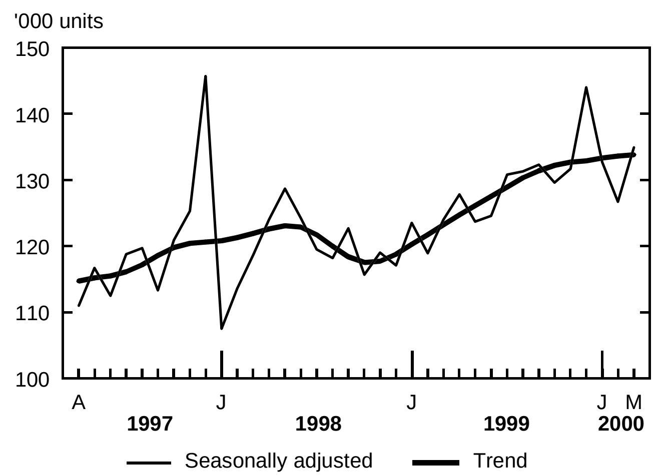
Consumers return in force to vehicle dealers' showrooms

Consumers returned in force to vehicle dealers' showrooms in March. Sales of new motor vehicles totalled 134,902 units, up from February by 6.5%. This jump in sales followed declines in February (-4.6%) and January (-7.8%) and a substantial gain in December (+9.3%). In terms of total number of vehicles sold, March 2000 and December 1999 were two of the three strongest months of the last 10 years. Despite the slowdown in recent months, sales of new vehicles have generally been rising since the end of 1998. (All the data are seasonally adjusted.)

Two-thirds of the sales increase in March was ascribed to cars. Sales of cars rebounded from February with an 8.2% increase to 72,041 vehicles. This increase was preceded by two major declines in February (-5.6%) and January (-11.6%), which followed a sizeable gain of 12.4% in December. Sales of new cars have been slowing since the end of 1999.

Not as volatile as car sales, truck sales rose 4.6% in March compared with February, for a total of 62,861 vehicles sold. This increase followed decreases in February (-3.4%) January (-3.0%). In December, the number of trucks sold increased 5.7%. Since the summer of 1999, new truck sales have remained relatively stable.

New motor vehicles sales



New motor vehicle sales advanced in March in all provinces except Prince Edward Island (-4.8%) and Saskatchewan (-3.5%). In both provinces, it was the third consecutive month of lower sales. Vehicle dealers in Quebec recorded the strongest increase over the previous month (+17.1%).

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... Consumers return in force to vehicle dealers' showrooms

Looking at the first quarter, the declines in January and February pulled the number of new vehicles sold down 2.7% from the previous quarter. However, compared with the first quarter of 1999, the number of new vehicles sold was up 7.6%. The number of new cars sold in the first quarter remained 5.2% lower than in the previous quarter. Year-over-year, quarterly sales of cars climbed 9.4%. Truck sales rose 0.3%; however, the year-over-year growth in the quarter (+5.7%) was smaller than for cars.

The March 2000 issue of ***New motor vehicle sales*** *(online at www.statcan.ca: 63-007-XIB, $13/$124) presents the full report. To order data, or for general information, contact Client Services (613-951-3549, 1 877 421-3067, retailinfo@statcan.ca), Distributive Trades Division. For analytical information, contact Clérance Kimanyi (613-951-6363, kimacle@statcan.ca), Distributive Trades Division.*

Large retailers' sales climb across the board

In February, large retailers' sales reached $4.9 billion, an increase of 7.9% from a year earlier. Sales rose in all the major product lines. The largest sales growth was in hardware, lawn and garden products and in "other goods and services", both up 15.9%.

Sales of lawn and garden furniture and equipment surged 44.6%, as sales of outdoor power equipment leapt 60.4%. Hardware sales, alone, rose 10.0%.

The two largest product lines within the "other goods and services" category are automotive fuels, oils and additives (sales of $102.2 million in February), and tobacco products and supplies ($150.7 million). Both these commodity groups significantly increased sales. Because of higher oil prices, sales of automotive fuels, oils and additives climbed 47.1%. Sales of tobacco products and supplies were up 12.4%.

Large retailers' sales
Not seasonally adjusted

	February 1999	February 2000	February 1999 to February 2000
	$ millions		% change
All commodities	**4,523**	**4,880**	**7.9**
Food and beverages	1,824	1,906	4.5
Clothing, footwear and accessories	769	800	4.1
Home furnishings and electronics	600	673	12.1
Health and personal care products	381	424	11.5
Housewares	217	234	7.7
Sporting and leisure goods	167	188	12.0
Hardware, lawn and garden products	120	139	15.9
All other goods and services	444	515	15.9

Note to readers

The composition of the group of large retailers changed in 1999. This affects the comparisons of year-over-year sales, especially in the food sector because several supermarket chains restructured. All data are unadjusted for seasonal factors—differences in the number or significance of shopping days in each month. For example, February 2000 had 29 shopping days, whereas February 1999 had just 28.

Home furnishings and electronics continued to show strong sales growth. Within the category, sales of home electronics advanced 19.8%, appliances 9.3%, and household furniture 7.6%.

Sporting and leisure goods sales were up as well, with sales of sporting goods alone jumping 21.5% because of higher sales of ski equipment and team sports gear. Sales of leisure goods, which include toys, CDs, books, magazines and craft supplies, rose 8.1%.

At the large retailers' food stores, sales increased 3.9%. Department store sales rose 4.5%. In February, food stores accounted for 42% of the large retailers' sales and department stores for 21%.

To order data, or for general information, contact Client Services (613-951-3549; 1-877-421-3067;retailinfo@statcan.ca. For more analytical information, contact Catherine Draper (613-951-0669;drapcat@statcan.ca), Distributive Trades Division.

Leasing and property management services: first data from a new survey

In 1997, an estimated 40,275 firms providing real estate rental/leasing and property management services operated for at least one day (includes incorporated and unincorporated businesses). Just over three out of four (77%) of these establishments were located in Ontario, Quebec and British Columbia. These firms include businesses with gross income greater than $30,000. Of these establishments, about 63% had annual revenues below $150,000.

The industry as a whole generated $29.3 billion in operating revenues that year. Businesses in Quebec and Ontario accounted for just over two-thirds of this revenue.

Total operating expenses stood at $20.8 billion. The major expenses for the real estate leasing industry were purchased services from other businesses, followed by salaries and wages, and depreciation. One-third of all operating expenses went toward purchased services; property taxes accounted for over one-third of the total. Salaries, wages and benefits, at $2.5 billion, comprised 12.0% of total operating costs, while depreciation charges at $2.4 billion accounted for 11.8%.

At the national level, the industry's gross profit margin in 1997 was 29.2%.

Note to readers

Results from the 1997 Survey of Real Estate Rental and Leasing and Property Management Service Industry are available for the first time. These results were produced as part of a pilot of the Unified Enterprise Survey. The real estate rental/leasing and property management services industry consists of firms that primarily provide renting and leasing real estate services, and/or manage real estate properties on behalf of property owners.

For further information on the Unified Enterprise Survey program, contact Les Graham (613-951-6566; grahles@statcan.ca), Enterprise Statistics Division. To order data, or for more analytical information, contact Irene Ross (613-951-6305; puccire@statcan.ca), Service Industries Division.

Foreign control of corporations continues moderate growth

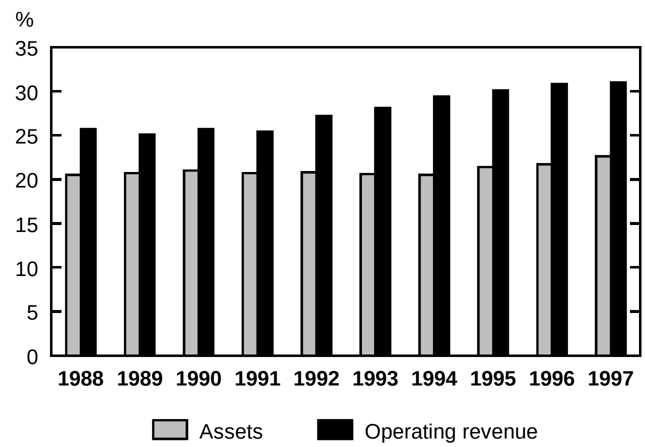
In 1997, foreign companies recorded a moderate increase in their share of both corporate assets and corporate operating revenue in Canada. Foreign firms controlled 22.6% of assets in Canada in 1997, up from 21.7% the year before and 20.5% in 1988. Similarly, they accounted for 31.0% of all corporate operating revenue, up marginally from 30.8% in 1996; the foreign-controlled share was 25.7% in 1988.

These latest data continue the trend of increases seen throughout the 1990s, a trend that is partly due to the growth in exports in the early and mid-1990s, as well as to globalization. Foreign-controlled firms are generally larger than Canadian firms. Their distribution network for goods and services is potentially more diverse and far-reaching than that of small Canadian-controlled firms. As well, they are less dependent than Canadian-controlled firms are on the Canadian domestic market for sales.

Several large Canadian firms also benefited directly from these international trends. Nevertheless, the majority of Canadian businesses are small and concentrate their attention on domestic markets. These firms have been less able to exploit the opportunities created by the export-led growth in the mid-1990s.

Since 1988, the proportion of foreign control over corporate assets has increased in most industries. In 1997, foreign firms controlled 71.1% of assets in the chemicals, chemical products and textiles industry—the highest level among all industries. That was followed by the transportation equipment industry (52.6%).

Foreign-controlled shares of assets and operating revenue, all industries



The proportion of foreign control over corporate operating revenue has also increased since 1988 in almost all industries. As was the case with assets, foreign firms accounted for 66.7% of revenue in the chemicals, chemical products and textiles industry—the highest share—and 55.3% in the transportation equipment industry. In the transportation equipment industry, the robust foreign control largely resulted from the ongoing strength of exports of motor vehicles and related automotive equipment by U.S.-controlled firms.

The United States continued to dominate the foreign-controlled share of both corporate operating revenue and corporate assets in

(continued on page 5)

... Foreign control of corporations continues moderate growth

Canada. American firms controlled 21.1% of operating revenue in 1997, up from 17.3% in 1988. Similarly, they controlled 13.0% of corporate assets in 1997, up from 11.0% a decade earlier. From 1996 to 1997, American-controlled assets increased 0.8%, a major contributor to the growth in the proportion of foreign-controlled assets in 1997.

The report ***Corporations Returns Act, 1997: Foreign control in the Canadian economy*** *(61-220-XPB, $40) is now available. For further information, contact Stewart Taylor (613-951-6564), Industrial Organization and Finance Division.*

Foreign share of assets and operating revenue

	Share of assets (%)			Share of operating revenue (%)		
	1988	1996	1997	1988	1996	1997
Total, non-financial industries	**23.3**	**25.4**	**26.7**	**25.9**	**31.4**	**31.6**
Wood and paper	27.2	36.3	31.7	20.6	28.1	25.7
Energy	23.3	18.1	19.8	32.4	33.7	33.7
Chemicals, chemical products and textiles	53.8	70.7	71.1	56.8	67.1	66.7
Metallic minerals and metal products	22.3	21.4	19.7	26.5	27.0	25.7
Machinery and equipment (except electrical)	42.5	46.3	43.7	36.6	40.2	41.7
Transportation equipment	45.0	51.7	52.6	47.5	54.0	55.3
Electrical and electronic products	48.2	48.4	44.4	53.6	55.8	50.9
Construction and related activities	11.6	12.6	13.4	8.5	11.0	11.8
Communications	9.9	8.8	10.2	10.6	12.7	13.4
Services	16.1	14.5	16.1	9.4	13.5	13.0
Consumer goods and services	20.2	25.1	25.4	17.5	27.5	26.4

New from Statistics Canada

A portrait of Ontario's voluntary organizations in the 1990s

During the past decade, many voluntary organizations in Ontario have been pressured by budget cuts, new public policies and changing community demands. This new study, *Voluntary organizations in Ontario in the 1990s*, examines how voluntary groups are coping. It shows that volunteers are in short supply and that income instability is widespread in voluntary agencies. Difficulties are being experienced, particularly by small organizations, which have few options for expanding their funding base.

As part of an ongoing initiative to build a comprehensive knowledge base for the voluntary sector, this study provides and assesses information that could be included in a national statistical program on voluntary organizations.

Voluntary organizations in Ontario in the 1990s *(75F0033MIE, no charge at www.statcan.ca) is one in a series of studies that are being conducted under the auspices of Statistics Canada's Non-profit Sector Knowledge Base Project. For more information, contact Dr. Paul Reed (613-951-8217; reedpau@statcan.ca), Statistics Canada.*

Industrial monitor on CD-ROM
May 2000

Industrial monitor on CD-ROM offers up-to-date data on more than 150 manufacturing industries and 33 other industries covering construction, wholesale trade and retail trade. This information is offered for 25 sectors, and can be purchased by individual sector or as a complete package. For each industry, up to 50 variables are organized in the Table Viewer according to five table types: supply, demand, price, labour/employment, and investment/capital stock. The disc's tools allow for extensive time-series analysis and inter-industry comparisons.

Industrial monitor on CD-ROM is linked to the Standard Industrial Classification manual. State-of-the-art functions offer quick and easy searching, charting, viewing, exporting and transforming capabilities.

The May 2000 issue of ***Industrial monitor on CD-ROM*** *is now available. An annual subscription (one CD-ROM per month) to the full package (15F0015XCB) costs $995, a savings of more than 80% off the annual subscription price of $258 per individual sector. For further information, or to request a free demo disc, contact Yolande Chantigny (1 800 887-4623; 613-951-4623; fax: 613-951-3688; imad@statcan.ca), Industry Measures and Analysis Division, or contact your nearest Statistics Canada Regional Reference Centre.*

International trade in environmental goods and services: a Canada-U.S. comparison

This new research paper analyzes Canada's trade in environmental goods and services and compares it with the trade profile of the world's largest environmental market, the United States. Often identified as an emerging sector, the environment industry is evolving into a complex industry that offers a wide range of technologies and services to protect and improve the environment.

The print version of ***International trade in environmental goods and services: a Canada-U.S. comparison*** *is now available. It includes new tables on Canadian international trade data. An online version of the report (16F0009XIE) will soon be available on Statistics Canada's Web site (www.statcan.ca). For more information, to order the print version, contact Rowena Orok (613-951-0344; fax: 613-951-0634), Environment Accounts and Statistics Division.*

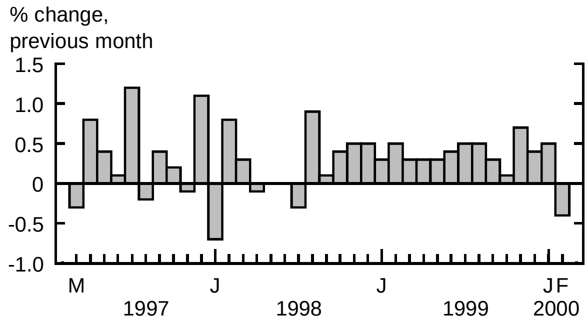
Education at a glance
2000

The 2000 edition of *Education at a glance: OECD indicators*, published by the Organisation for Economic Co-operation and Development (OECD), is now available. The 30 indicators in this latest update represent the consensus of professional thinking on how to measure the current state of education internationally. The thematic organization of the volume and the background information accompanying the tables and charts make this publication a valuable resource for anyone interested in analyzing and comparing education systems across countries.

More information on ***Education at a glance: OECD indicators*** *is available at http://oecd.org/news_and_events. The underlying data are posted at www.oecd.org/els/stats/els_stat.htm. For more information, contact Jim Seidle (613-951-1500; jim.seidle@statcan.ca), Centre for Education Statistics.*

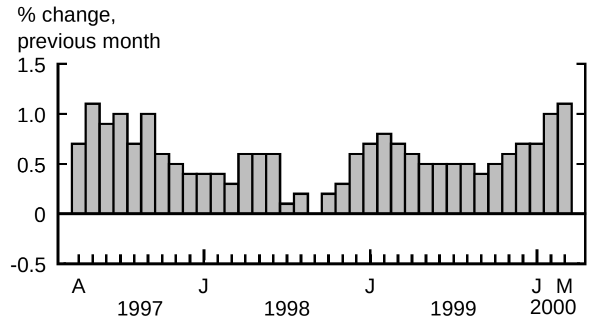
Current trends

Gross domestic product



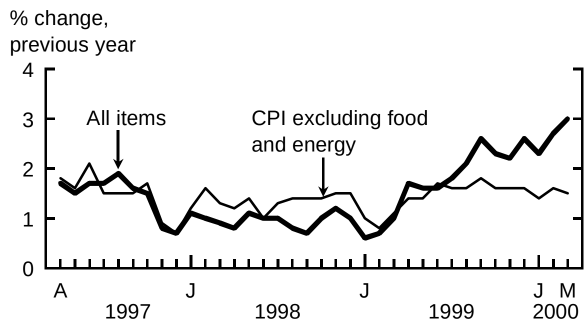
Economic activity receded for the first time in 19 months in February, declining 0.4%. The decline followed three months of strong growth.

Composite Index



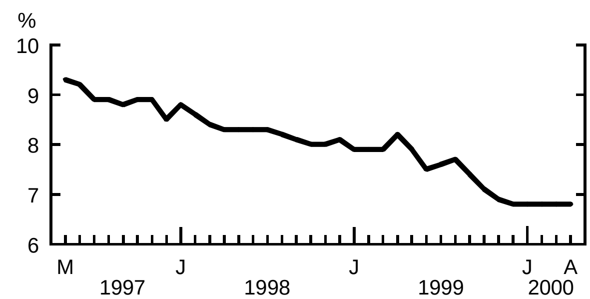
In March, the leading indicator grew by 1.1%. The advances in February and March reflected strength in houshold demand.

Consumer Price Index



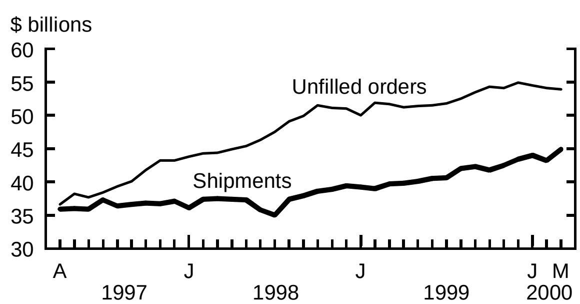
Consumer prices for goods and services were 3.0% higher in March 2000 than they were a year earlier. Excluding food and energy, prices rose 1.5%.

Unemployment rate



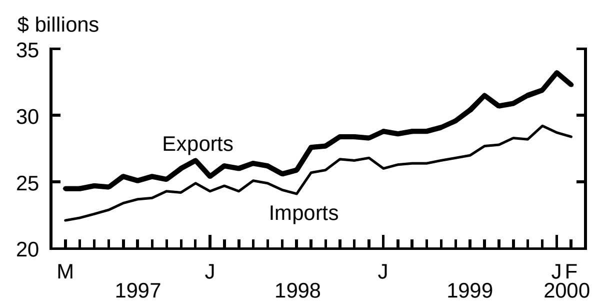
In April, the unemployment rate remained at 6.8% for a fifth consecutive month.

Manufacturing



Manufacturers' shipments rebounded 3.8% in March to $44.9 billion. The backlog of unfilled orders decreased 0.3% to $53.9 billion.

Merchandise trade



In February, the value of merchandise exports declined 2.6% from January to $32.3 billion. Imports slipped 1.2% to $28.4 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 ($ billion, 1992)	February	766.8	-0.4%	3.8%
Composite Index (1992=100)	March	160.1	1.1%	7.9%
Operating profits of enterprises ($ billion)	Q4 1999	43.9	7.8%	27.1%
Capacity utilization (%)	Q4 1999	86.8	1.3†	4.0†
DOMESTIC DEMAND				
Retail trade ($ billion)	February	22.3	-1.1%	4.9%
Department store sales ($ billions)	March	1.48	-0.4%	1.8%
New motor vehicle sales (thousand of units)	March*	134.9	6.5%	8.8%
Wholesale trade ($ billion)	March*	31.6	2.0%	8.7%
LABOUR				
Employment (millions)	April	14.86	0.0%	2.9%
Unemployment rate (%)	April	6.8	0.0†	-1.4†
Participation rate (%)	April	65.8	-0.1†	0.0†
Average weekly earnings ($)	February	622.42	0.4%	2.8%
Help-wanted Index (1996=100)	April	167	-2.3%	7.1%
INTERNATIONAL TRADE				
Merchandise exports ($ billion)	February	32.3	-2.6%	12.9%
Merchandise imports ($ billion)	February	28.4	-1.2%	7.7%
Merchandise trade balance (all figures in $ billion)	February	4.0	-0.5	1.7
MANUFACTURING				
Shipments ($ billion)	March*	44.9	3.8%	13.0%
New orders ($ billion)	March*	44.8	4.5%	13.3%
Unfilled orders ($ billion)	March*	53.9	-0.3%	4.2%
Inventory/shipments ratio	March*	1.28	-0.03	-0.01
PRICES				
Consumer Price Index (1992=100)	April*	110.1	-0.4%	2.1%
Industrial Product Price Index (1992=100)	March	126.6	0.6%	5.5%
Raw Materials Price Index (1992=100)	March	142.7	2.0%	33.1%
New Housing Price Index (1992=100)	March*	102.5	0.1%	2.0%

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

Infomat
A weekly review

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Publications released from May 11 to 18, 2000

Division/Title of publication	Period	Catalogue number	Price ($) (issue/subscription)
CULTURE, TOURISM AND THE CENTRE FOR EDUCATION STATISTICS			
International travel, advance information, vol. 16, no. 3	March 2000	66-001-PIB	6/55
DISTRIBUTIVE TRADES			
New motor vehicle sales	March 2000	63-007-XIB	13/124
LABOUR STATISTICS			
Employment, earnings and hours	February 2000	72-002-XPB	32/320
MANUFACTURING, CONSTRUCTION AND ENERGY			
Asphalt roofing	March 2000	45-001-XIB	5/47
Industrial chemicals and synthetic resins	March 2000	46-002-XIB	5/47
Oils and fats	March 2000	32-006-XIB	5/47
Particleboard, oriented strandboard and fibreboard	March 2000	36-003-XIB	5/47
Pipeline transportation of crude oil and refined petroleum products	February 2000	55-001-XIB	9/86
Primary iron and steel	March 2000	41-001-XIB	5/47
Production and shipments of steel pipe and tubing	March 2000	41-011-XIB	5/47
Refined petroleum products	September 1999		
Internet		45-004-XIB	16/155
Paper		45-004-XPB	21/206
PRICES			
The consumer price index	April 1999	62-001-XPB	11/103

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