



Infomat

A Weekly Review

Friday, June 13, 2003

INSIDE

◆ Slight increase in industrial capacity use

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◆ Non-residential projects fuel rise in building permits

The value of building permits issued across the country edged up marginally in April, as construction intentions for new housing plunged to a 10-month low and permits for non-residential projects rebounded sharply. Municipalities issued \$3.7 billion in building permits in April, an increase of only 0.5%.

◆ Growth down in Canada's trucking industry

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◆ High tech helps food processors achieve superior productivity growth

Food processing plants that adopted high technology by the end of the 1990s generally enjoyed a far superior growth in productivity than the companies that did not, according to a new research paper.

Employment down for second month in a row

Employment dipped 13,000 in May, the second consecutive monthly decline. A jump in the number of people entering the labour market in search of work pushed the unemployment rate up 0.3 percentage points to 7.8%.

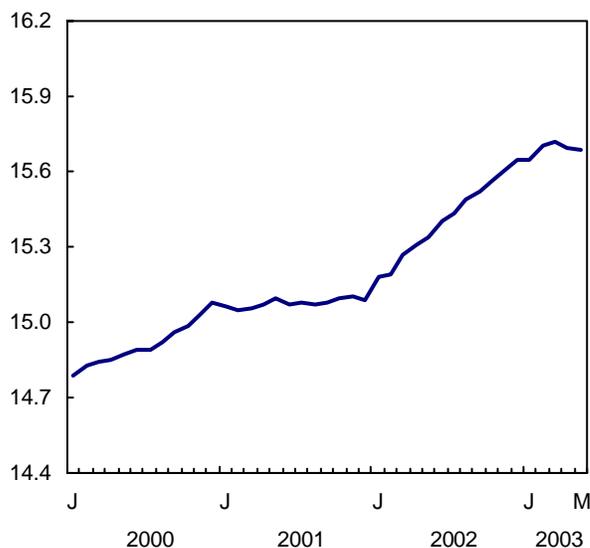
The share of the population that was employed was 62.2%, down 0.3 points from the record high set in February and March. The employment rate in Canada has been higher than the rate in the United States since October 2002.

Manufacturing employment was unchanged in May. Employment in transportation equipment manufacturing fell, but this was offset by gains in food processing and other non-durable goods production. After rebounding in the first half of 2002, manufacturing employment has been on a downward trend since last August.

(continued on page 2)

Employment

Millions, seasonally adjusted



Employment down ... (continued from page 1)

Employment fell in a number of service-producing industries in May. The largest drop was in finance, insurance, real estate and leasing, which was down 19,000. However, this remains a growth industry, as a result of the booming real estate sector.

The largest gain in employment in May was in information, culture and recreation, where an additional 20,000 people were employed. Gains were made in publishing and gambling.

Following a decline of 17,000 in April, health care and social assistance employment increased by 18,000 in May, with 11,000 of the gains in Ontario. This put health care and social assistance back on its strong upward trend.

Employment among adult men fell 23,000 in May. Losses for adult men were widespread in a number of industries, with the largest decline in retail and wholesale trade. The unemployment rate for adult men increased 0.3 points to 6.7%.

Part-time gains among youths offset full-time losses, leaving overall youth employment unchanged for the month. With more youths looking for work, their unemployment rate increased 0.4 percentage points to 13.8%.

For adult women, employment was up slightly (+13,000) in May; the largest increase came in health care and social assistance. There was also a large increase in labour force participation among adult women, pushing their unemployment rate up 0.3 points to 6.6%.

After strong job gains in the second half of 2002 and into the early part of 2003, employment growth has stalled in Ontario in the last two months. A large drop in full-time employment was offset by part-time gains, leaving employment in the province unchanged in May. The unemployment rate increased 0.3 points to 7.1% as a result of a large number of people entering the labour force.

With drops in accommodation and food and in public administration, employment was down slightly in Quebec. The unemployment rate in the province rose 0.2 points to 9.3% in May.

Although full-time employment in British Columbia increased by 13,000, part-time declined 21,000, pushing the unemployment rate up half a point to 8.6% in May.

Labour Force Survey, May 2003 Seasonally adjusted¹

	Labour force		Employment		Unemployment	
	'000	% change, previous month	'000	% change, previous month	'000	rate (%)
Canada	17,020.1	0.2	15,685.1	-0.1	1,335.0	7.8
Newfoundland and Labrador	261.4	-0.8	218.4	0.3	43.0	16.4
Prince Edward Island	77.2	-0.1	67.8	0.6	9.4	12.2
Nova Scotia	479.3	-0.2	436.6	-0.5	42.8	8.9
New Brunswick	383.4	-0.6	337.5	-2.5	45.9	12.0
Quebec	4,010.3	0.0	3,637.5	-0.3	372.8	9.3
Ontario	6,685.0	0.4	6,209.6	0.0	475.4	7.1
Manitoba	598.9	0.5	572.0	0.3	26.9	4.5
Saskatchewan	516.6	0.3	488.1	0.2	28.5	5.5
Alberta	1,814.8	0.8	1,713.2	0.7	101.6	5.6
British Columbia	2,193.2	0.2	2,004.5	-0.4	188.7	8.6

¹ Data are for both sexes aged 15 and over.

Following a decline of 5,000 in April, employment in New Brunswick fell by another 9,000 in May. This caused the unemployment rate to leap 1.7 points to 12.0%. Losses were widespread in a number of industries, but the largest decline was in food manufacturing.

The only province with a notable increase in employment in May was Alberta, where an additional 13,000 people were employed, as a result of gains in oil and gas, education and health care and social assistance. However, with more people also looking for work, the unemployment rate in Alberta increased slightly to 5.6% (+0.1 points).

A more detailed summary, Labour force information (Internet: 71-001-XIE, \$8/\$78), is now available for the week ending May 17. For more information, contact Geoff Bowlby (613-951-3325) or Vincent Ferrao (613-951-4750), Labour Statistics Division. (See also "Current trends" on page 7.)

Favourable market, higher construction costs push up new home prices

The New Housing Price Index (1992=100) advanced 0.4% in April, up from the 0.1% monthly increase registered in March. On a 12-month basis, this index of contractors' selling prices was 4.5% higher than in April 2002. A favourable housing market and higher prices for construction inputs, such as building materials and labour, pushed prices up nationally.

Monthly rises occurred in 15 of the 21 urban centres surveyed, with the largest gains in Halifax (+1.8%), Victoria (+1.2%), Québec (+0.9%) and London (+0.8%). Home builders in Halifax, Québec and London cited higher prices for building materials and labour; home builders in Victoria noted a favourable housing market along with higher land values.

A small decrease (-0.1%) was registered in Kitchener-Waterloo because of competitive pricing. Five urban centres registered no change.

For the second consecutive month, Québec registered the largest 12-month increase (+9.6%) for new homes across the country. Victoria (+8.4%) was next, followed by Hamilton (+7.3%).

The second quarter 2003 issue of Capital expenditure price statistics (paper: 62-007-XPB, \$24/\$79) will be available in October. For more information, contact Perry Kirkpatrick (613-951-9606; infounit@statcan.ca) or Susan Morris (613-951-2035; morrsus@statcan.ca), Prices Division.

Slight increase in industrial capacity use

Industrial capacity utilization increased only marginally from January to March in the wake of weakness in American demand and the rising value of the Canadian dollar. Industries operated at 82.8% capacity in the first quarter, up slightly from 82.5% in the fourth quarter of 2002.

Contributing to the slight increase was domestic demand, supported by personal spending and investment in residential construction.

Weakness in American demand and the increased value of the Canadian dollar in the first quarter led to a decline in exports. In some sectors, a slowdown in sales and increased production resulted in a noticeable increase in inventory. Manufacturers increased their inventories by \$3.8 billion as a result of the slowdown in exports.

In the manufacturing sector, the capacity utilization rate held steady at 84.1%, the same as in the fourth quarter of 2002. Of the 21 groups that comprise this sector, 12 showed a decline in the rate.

Manufacturers in computer and electronic products used 62.7% of capacity in the first quarter, down from 64.8% in the fourth quarter and far below the peak of 99.6% in the third quarter of 2000.

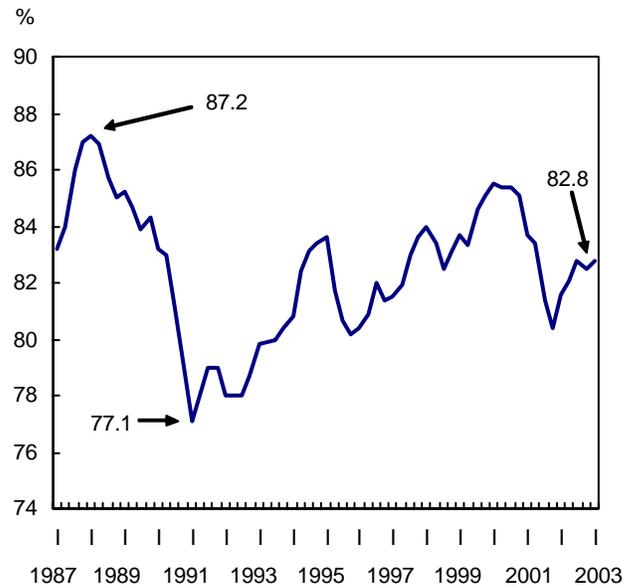
Capacity utilization for manufacturers of transportation equipment fell 0.4 percentage points to 88.0%. Production in the aerospace industry declined 5.3% because of weak foreign demand; in March, orders fell to the lowest level in four years.

In the machinery industry, the rate fell from 81.6% to 80.7%. Varying results in the production of components in this industry led to a reduction of 1.5% in industry production. In contrast, manufacturers of fabricated metal products increased capacity utilization by 1.9 points to 85.7% in the first quarter.

Industrial capacity utilization rates, First quarter 2003

	%	% point change, previous quarter	% point change, previous period
All industries	82.8	0.3	1.2
Forestry and logging	83.5	4.2	14.2
Mining and oil and gas extraction	72.4	0.9	-0.5
Electric power generation, transmission and distribution	89.1	0.5	1.5
Construction	84.7	0.6	-0.9
Manufacturing	84.1	0.0	1.9

Industrial capacity utilization rate



The non-metallic mineral product manufacturing industry continued to benefit from vigorous residential construction. The industry rate grew to 89.4% in the first quarter from 86.1% in the fourth, the sixth consecutive quarterly increase.

The construction sector operated at 84.7% of production capacity in the first quarter, up 0.6 percentage points from the fourth quarter of 2002. Increased investment in residential construction led to an increase of 1.3% in production.

The mining sector's capacity utilization rate increased to 84.1% in the first quarter from 81.2% in the fourth. Oil and gas extraction production showed a very small increase of 0.1% and capacity utilization held steady at 66.8% in the first quarter.

Energy demand increased in the first quarter because of a particularly severe winter. Electric power production increased 0.8% and the rate reached 89.1%, compared with 88.6% in the fourth quarter of 2002.

Despite trade barriers still imposed by the United States, the forestry and logging sector showed an increase of 5.1% in production. The capacity utilization rate for the sector was 83.5%, up from 79.3% in the fourth quarter of 2002.

For more information, contact Mychèle Gagnon (613-951-0994) or Richard Landry (613-951-2579), Investment and Capital Stock Division.

Non-residential projects fuel rise in building permits

The value of building permits issued across the country edged up marginally in April, as construction intentions for new housing plunged to a 10-month low and permits for non-residential projects rebounded sharply. Municipalities issued \$3.7 billion in building permits in April, an increase of only 0.5%.

Despite the slight overall increase in April, the cumulative value of permits issued in the first four months of the year reached a record high, thanks to torrid activity in January. From January to April, municipalities issued nearly \$15.6 billion in permits, up 4.6% from the same period of 2002.

Housing permits fell 6.8% to \$2.3 billion. Municipalities issued \$1.6 billion in single-family permits, down 6.1% from March, the third consecutive monthly decline. Even more marked was the monthly decline in multi-family permits, which fell 8.6% to \$645 million.

However, the year-to-date value for housing permits hit a record high of \$9.8 billion, a 2.1% increase from the same period of 2002.

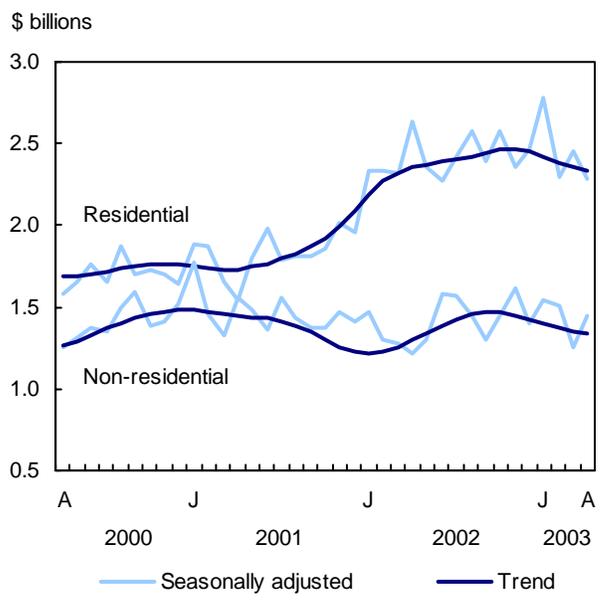
A number of factors may have contributed to the moderation seen in April's numbers. Mortgage rates appear ready to remain low for some time to come, so there has been less pressure on consumers to rush to secure financing. The past two years have seen permits issued at a feverish pace, and the pent-up demand might be easing. In addition, the desire among builders to push the sale of new units may be cooling as they concentrate on finishing projects already on their order books. Some builders have noted difficulty in achieving reasonable delivery time frames, given labour force constraints.

On a provincial basis, Saskatchewan experienced the greatest increase in permit value from March (+166.6% to \$47.6 million), chiefly as a result of an increase in permits for apartments. After recording a jump in March, British Columbia recorded the greatest monthly decline (-28.0% to \$317.4 million).

April's rebound in non-residential permits followed two straight monthly declines, and was led by a strong increase in institutional intentions. April's level was 14.8% higher than in March, reaching \$1.4 billion.

Institutional intentions increased 79.7% to \$500 million. Most of this activity came from social service buildings and from

Value of building permits



medical, hospital and educational projects. The value of commercial permits increased 3.4% to \$703 million, the result of higher intentions in the office building and hotel and restaurant categories. Only the industrial component showed a decline in April, falling 20.0% to \$239 million, the result of declines in the manufacturing plant category.

The most significant monthly increase occurred in Manitoba (+276.9% to \$177 million), because of a large increase in the institutional category. In contrast, Ontario posted the largest decrease (-13.8% to \$480 million) for the second consecutive month.

From January to April, non-residential building intentions reached \$5.7 billion, up 9.1% from the same period of 2002, following increases in all three components.

*The April 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.*

Growth down in Canada's trucking industry

Economic growth fell 3.2% in Canada's trucking industry in 2001, the largest decline among the eight segments in the nation's transportation sector, according to the latest analysis of the industry.

However, trucking still accounted for 31% of total output in the transportation sector, as measured by gross domestic product (GDP), the highest share among the sector's eight segments.

Trucking's share of output in transportation remained relatively consistent during the previous four years, ranging from 30.8% to 31.8%.

Rail transportation, trucking's main competitor, accounted for 12% of GDP in the transportation sector in 2001, virtually unchanged since 1998.

The Canadian trucking industry has shown signs of slowing down since 1999. This has been due to a number of factors: increased fuel costs, uncertainty about the economy, the cooling down of the US economy and the events of September 11, 2001.

In 2001, the roughly 1,900 long distance for-hire trucking companies based in Canada that had annual operating revenues of \$1 million or more generated \$14.7 billion in revenues, up 6.9% from 2000.

This rate of growth was slightly slower than the 7.3% gain in 2000, and considerably slower than the 15.9% increase in 1999.

These long distance carriers hauled 288 million metric tonnes of freight in 2001, up 3.4%.

Domestic shipments accounted for 74% of this total tonnage and 54% of revenues. Carriers hauled more than 29 million shipments within Canada, weighing 212.8 million tonnes. Domestic shipments generated more than \$7.9 billion in revenues.

Transborder movements accounted for 21% of total shipments and 46% of revenues. Carriers hauled 7.7 million shipments across the Canada-US border in 2001, with freight totalling more than 75 million tonnes. These transborder shipments generated \$6.8 billion in revenues.

The most frequent single commodity moved to or from the United States, other than miscellaneous transported products, was motor vehicles, parts and accessories.

In total, the transportation sector employed 475,500 people in 2001. A total of 161,600 people were working in trucking, up 2.7% from 2000. They accounted for 34% of all workers in transportation.

Data showed that carriers were generally profitable in 2001. For-hire trucking companies generated \$19.5 billion in total revenues and had \$18.4 billion in total expenses. The overall operating profit margin in 2001 was 5.7%, compared with 5.3% the year before.

However, operating profit margins for large carriers — those with annual revenues of between \$12 million and \$25 million — fell from 4.1% in 2000 to 3.9% in 2001.

*The 2001 edition of **Trucking in Canada** (Internet: 53-222-XIB, \$39) is now available. For more information, contact John Ross (613-951-1922), Transportation Division.*

Passenger bus industry

Urban bus riders steered the passenger bus industry toward revenues of \$4.3 billion in 2001 (excluding subsidies), according to the first results from a newly redesigned survey. The 1.5 billion passenger trips made on urban transit buses in 2001 accounted for just under half of the industry's total annual revenues, or about \$2.1 billion.

For the entire bus industry (which includes urban transit, scheduled intercity, school bus, sightseeing, shuttle and charter services), Ontario contributed about half of all revenues grossed in Canada, at \$2.1 billion; Quebec was second at \$1.2 billion.

Expenditures for the industry totalled \$6.1 billion dollars, almost two-thirds of which was spent by urban transit operators. Operating expenses made up 88% of total expenditures for the industry as a whole, with the remaining 12% covering depreciation, interest payments and other non-operating expenses.

In 2001, the industry employed about 90,000 people, whose salaries and wages accounted for 55% of the total expenditures. The average salary for all employees regardless of the type of bus company was \$36,000.

For more information, contact Jean-Robert Larocque (613-951-2486; laroque@statcan.ca), Transportation Division.

High tech helps food processors achieve superior productivity growth

Food processing plants that adopted high technology by the end of the 1990s generally enjoyed a far superior growth in productivity than companies that did not, according to a new research paper.

The study also found a strong link between growth in productivity and market share. Plants that adopted high technology enjoyed higher productivity and, as a result, recorded gains in market share throughout the decade.

Certain types of technology had a greater impact on growth than others. Information and communications technologies, such as local and wide area networks and inter-company computer networks, were most closely associated with superior performance.

Food processing is Canada's third largest manufacturing industry, consisting of more than 3,000 establishments. In 1998, the industry employed nearly 230,000 people and boasted output of \$15 billion.

The study looked at some 60 advanced technologies identified on the 1998 Survey of Advanced Technology in the Canadian Food Processing Industry, ranging from communications to quality control to packaging. Previous studies presumed that the adoption

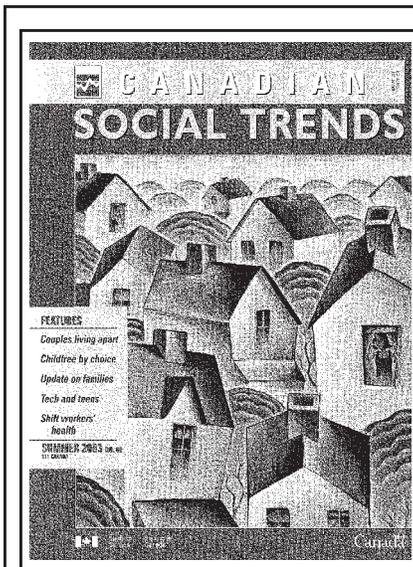
of advanced technology would lead to better firm performance. This study uses a new set of data to gain a more complete view of the links between advanced technology use and increased productivity in the food processing industry.

By the end of the 1990s, 9 out of 10 food processing plants had adopted at least one of the 60 advanced technologies. About 7% used 20 or more.

Adoption rates were highest for local area networks, programmable logical controllers, and the use of advanced materials for packaging. At least one-third of firms had adopted these technologies by the late 1990s.

Other characteristics, such as the innovation stance of the firm, its business practices and human resource strategies, influence the extent to which a firm adopts new advanced technologies. However, their direct impact on productivity growth, or market-share growth, is less than the indirect impact through their influence on technology use.

*The research paper **Impact of advanced technology use on firm performance in the Canadian food processing sector** (11F0027MIE2003012, free), the third in a series examining the relationship between firm performance and advanced technology use, is now available on Statistics Canada's website (www.statcan.ca). For more information, contact David Sabourin (613-951-3735; sabodav@statcan.ca), Industrial Organization and Finance Division.*



Canadian social trends

Each quarter, *Canadian social trends* integrates data from many sources to examine emerging social trends and issues. The summer 2003 issue contains five articles.

The feature article, "Couples living apart," uses data from 2001 to examine the characteristics of unmarried couples who live in separate residences while maintaining an intimate relationship. "Childfree by choice" looks at the socio-demographic characteristics — marital status, religion, country of birth, education and income — of Canadians aged 20 to 34 who, in 2001, intended to stay childfree. "Update on families" outlines the major changes that have occurred within families and their living arrangements over the last 20 years. "Tech and teens: Access and use" examines Canadian 15-year-old students' use of information and communication technologies at home and at school. Finally, "The health of Canada's shift workers" provides an up-to-date profile of shift workers and studies their physical and mental health.

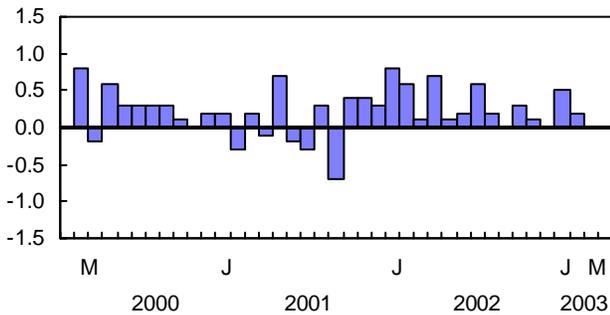
This issue of *Canadian social trends* also features the latest social indicators as well as information about Statistics Canada's products and services.

*The summer 2003 issue of **Canadian Social Trends** (Internet: 11-008-XIE, \$8/\$27; paper: 11-008-XPE, \$11/\$36) is now available. For more information, contact Warren Clark (613-951-2560; cstsc@statcan.ca), Housing, Family and Social Statistics Division.*

Current trends

Gross domestic product

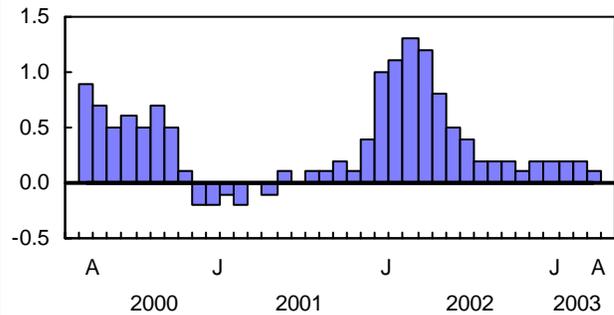
% change, previous month



Total economic activity was changed in March, after a gain of 0.2% in February.

Composite Index

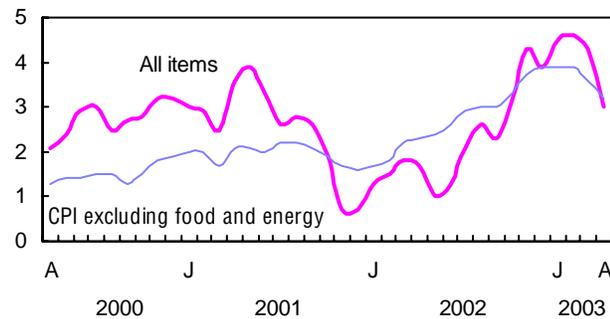
% change, previous month



The leading indicator grew 0.1% in April after rising 0.2% in March.

Consumer Price Index

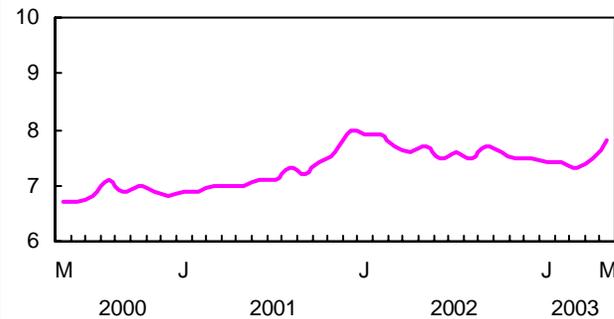
% change, previous year



Consumer prices for goods and services were 3.0% higher in April than they were a year earlier. Excluding food and energy, prices rose 3.2%.

Unemployment rate

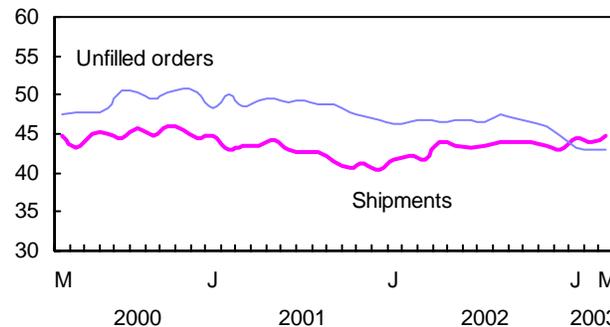
%



In May, the unemployment rate rose 0.3 percentage points to 7.8%.

Manufacturing

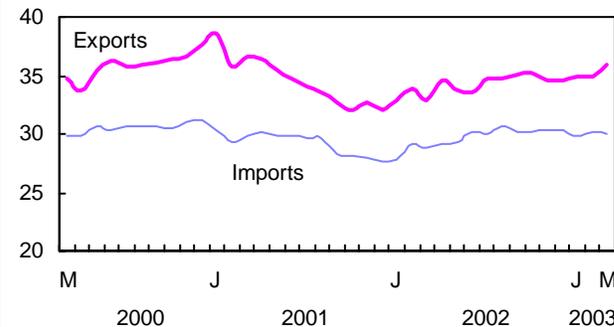
\$ billions



Manufacturers' shipments rose 1.4% in March to \$44.7 billion. The backlog of unfilled orders declined 0.4% to \$42.9 billion.

Merchandise trade

\$ billions



In March, the value of merchandise exports rose 2.8% to \$35.9 billion. Imports fell 0.5% to \$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	March	995.7	0.0%	3.2%
Composite Index (1992=100)	April	181.1	0.1%	3.4%
Operating profits of enterprises (\$ billions)	Q1 2003*	42.9	10.6%	26.6%
Capacity utilization rate (%) ²	Q1 2003*	82.8	0.3†	1.2†
DOMESTIC DEMAND				
Retail trade (\$ billions)	March	26.4	-0.7%	4.7%
New motor vehicle sales (thousands of units)	April*	132.5	-3.8%	-7.4%
Wholesale trade (\$ billions)	March	36.6	-0.5%	8.0%
LABOUR				
Employment (millions)	May*	15.7	-0.1%	2.3%
Unemployment rate (%)	May*	7.8	0.3†	0.1†
Participation rate (%)	May*	67.5	0.1†	0.7†
Average weekly earnings (\$)	March	685.78	-0.03%	1.32%
Regular Employment Insurance beneficiaries (in thousands)	March	535.2	0.7%	-2.8%
INTERNATIONAL TRADE				
Merchandise exports (\$ billions)	March	35.9	2.8%	9.0%
Merchandise imports (\$ billions)	March	30.0	-0.5%	4.1%
Merchandise trade balance (all figures in \$ billions)	March	5.9	1.1	1.8
MANUFACTURING				
Shipments (\$ billions)	March	44.7	1.4%	6.9%
New orders (\$ billions)	March	44.5	1.6%	5.7%
Unfilled orders (\$ billions)	March	42.9	-0.4%	-8.7%
Inventory/shipments ratio	March	1.43	-0.01	-0.05
PRICES				
Consumer Price Index (1992=100)	April	121.9	-0.7%	3.0%
Industrial Product Price Index (1997=100)	April	107.6	-1.4%	-0.1%
Raw Materials Price Index (1997=100)	April	116.2	-6.5%	3.4%
New Housing Price Index (1992=100)	April*	114.3	0.4%	4.5%

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.

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A weekly review

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Products released from June 5 to 11, 2003

SUBJECT AREA Title of product	Period	Catalogue number	Price (\$) (issue/subscription)
AGRICULTURE			
Farm and off-farm income statistics	2000	21-019-XIE	free
Production of eggs	April 2003	23-003-XIB	free
CULTURE, TOURISM AND THE CENTRE FOR EDUCATION STATISTICS			
Education quarterly review	Vol. 9, no. 2	81-003-XIE	16/51
HEALTH STATISTICS			
Marriages — Shelf tables	2000	84F0212XPB	20
HOUSING, FAMILY AND SOCIAL STATISTICS			
Canadian social trends	Summer 2003	11-008-XIE	8/27
Canadian social trends	Summer 2003	11-008-XPE	11/36
INCOME STATISTICS			
User's guide for cross-sectional public-use microdata file — Survey of Labour and Income Dynamics	1999	75F0002MIE2003001	free
User's guide for cross-sectional public-use microdata file — Survey of Labour and Income Dynamics	2000	75F0002MIE2003002	free
INTERNATIONAL TRADE			
Imports, merchandise trade	2002	65-203-XMB	103
Imports, merchandise trade	2002	65-203-XPB	258
INVESTMENT AND CAPITAL STOCK			
Building permits	April 2003	64-001-XIE	14/14
LABOUR STATISTICS			
Employment, earnings and hours	March 2003	72-002-XIB	24/240
Labour force information, week ending May 17, 2003		71-001-XIE	8/78
MANUFACTURING, CONSTRUCTION AND ENERGY			
Cement	April 2003	44-001-XIB	5/47
Particleboard, oriented strandboard and fibreboard	February 2003	36-003-XIB	5/47
Shipments of solid fuel-burning heating products	Q1 2003	25-002-XIB	6/19
SCIENCE, INNOVATION AND ELECTRONIC INFORMATION			
Science statistics	Vol. 27, no. 4	88-001-XIB	6/59
TRANSPORTATION			
Aviation: service bulletin	Vol. 35, no. 3	51-004-XIB	8
The future for Canada-US container port rivalries	2001	54F0001XIE	free

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