Friday, January 30, 1998

OVERVIEW

Exports set new record

Exports jumped in November, as industrial goods and forestry products showed renewed strength. Imports edged down, primarily due to lower machinery and equipment imports.

Shipments edge down

Total manufacturing shipments edged down in November, partly due to lower component prices in the electrical and electronic products industry.

Drop in retail sales

Four months of advances in retail sales ended in November with a broadly based decline.

Wholesale sales decline

Total wholesale sales were down in November, reflecting declines in most sectors. However, so far 1997 has been an excellent year for wholesalers.

♦ Consumer prices up in December

Consumers paid more for goods and services in December 1997 than they did a year earlier. However, it was the lowest 12-month change in the CPI since the beginning of 1995.

♦ Composite Index rises

The Composite Index rose in December. Although growth has slowed steadily since the beginning of 1997, a majority of components continued to expand.

More Americans visit Canada

In November, Americans made the greatest number of same-day car trips to Canada since June 1981. Meanwhile, Canadians made a record number of trips overseas.

Exports set new record

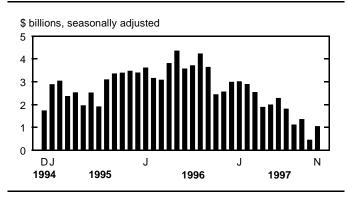
xports set a new record in November, rising 1.5% to \$25.6 billion. Higher exports of industrial goods, forest products and consumer goods more than offset lower exports of machinery and equipment and agricultural and fishing products. Although imports edged down 0.9% to \$24.5 billion, they remained near record levels. Imports of machinery and equipment, automotive products and industrial goods contributed most to November's slide. The trade balance rose above \$1 billion, contrasting with the small surplus of \$432 million registered in October.

The strong performance of industrial goods exports (+3.8%) was due to a jump in exports of precious metals (especially gold). Forestry product exports made a modest recovery (+1.8%), as an increase in paper exports to the European Union and the United States slightly offset a continuing slump in softwood lumber exports to Japan.

Energy product exports posted their third consecutive monthly decline in November (-1.2%). Stronger exports of coal and other crude bituminous materials did little to offset a dip in crude petroleum and natural gas exports. After two months of sustained growth, machinery and equipment exports fell 1.8%. This decline was apparent in most sectors, including the television, communications

(continued on page 2)

Trade balance





... Exports set new record

and related equipment sector. Exports of agricultural and fishing products were down again in November (–5.2%); lower wheat and canola exports were the key factor in the decrease.

After five months of uninterrupted growth, machinery and equipment imports posted a slight decline (-1.3%) in November. Automotive product imports edged down 0.8%, chiefly because of weakness in motor vehicle parts imports from the United States and imports of trucks and other motor vehicles. After a sharp increase in October, imports of industrial goods fell slightly (-0.8%), primarily due to lower imports of iron and steel products from Mexico.

Energy product imports were nearly flat in November (+0.5%), although petroleum and coal products posted a small gain. Imports of forestry products jumped 6.9%, mostly due to unusually high imports of veneer from France.

Note to readers

Merchandise trade is one component of the current account of Canada's balance of payments, which also includes trade in services.

Available on CANSIM: matrices 3618, 3619, 3651, 3685–3713, 3718–3720, 3887–3913, 8430–8435 and 8438–8447.

The November 1997 issue of Canadian international merchandise trade (65-001-XPB, \$19/\$188) is now available. Current account data are available on a quarterly basis in Canada's balance of international payments (67-001-XPB, \$38/\$124). For further information, contact Jocelyne Elibani (613-951-9647 or 1 800 294-5583), International Trade Division. (See also "Current trends" on page 7.)

Shipments edge down

otal manufacturing shipments edged down 0.3% to \$36.9 billion in November, partly due to lower component prices in the electrical and electronic products industry. Despite the decline, manufacturers' shipments continued the upward growth trend that began in early 1996, although this growth has been at a slightly slower pace in recent months. Shipments fell in 12 of the 22 major groups in November, representing 42.6% of total shipments.

The major contributor to November's decrease was the electrical and electronic products industry (-4.2%), where widespread declines in value were partially a result of downward pressure on component prices. The next largest contributor was the aircraft and parts industry (-8.1%). The biggest offsetting increase came from the motor vehicle industry (+1.7%), as plants that experienced shutdowns and supplier delays in September and October boosted production back to more normal levels in November.

Manufacturers' backlog of unfilled orders rose 2.6% in November to \$42.0 billion. Unfilled orders are a key determinant of future shipments; however, roughly 60% of the year-to-date increase (+22.6%) in unfilled orders has been recorded in the aircraft and parts industry, where orders can be stretched out over a number of years before they are completed. In November, the largest increases in unfilled orders came from the aircraft and parts

Manufacturers' shipments, November 1997 Seasonally adjusted

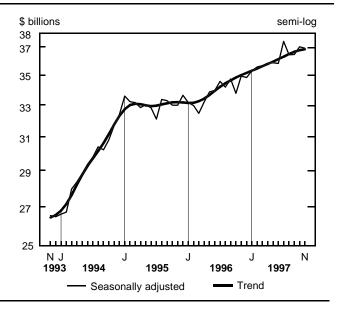
	\$ millions	% change, previous month
Canada	36,906	- 0.3
Newfoundland	145	- 7.6
Prince Edward Island	76	- 4.6
Nova Scotia	542	0.8
New Brunswick	694	- 1.7
Quebec	8,638	- 0.3
Ontario	19,618	- 0.6
Manitoba	897	2.5
Saskatchewan	513	- 4.3
Alberta	294	1.5
British Columbia	283	0.4
Yukon and Northwest Territories	3	- 1.3

Note to readers

Unfilled orders are a stock of orders that will contribute to future shipments, assuming that orders are not cancelled. New orders represent orders received whether shipped in the current month or not (that is, orders received this month and shipped within the same month) plus the change in unfilled orders. Some people interpret new orders as orders that will lead to future demand. This is not appropriate since the new orders variable includes orders that have already been shipped. Users should be aware that the month-to-month change in new orders may be volatile, particularly if the previous month's change in unfilled orders is large in relation to the current month's change.

Some orders will not be translated into Canadian factory shipments, as portions of large contracts can be subcontracted out to other countries.

Shipments



(continued on page 3)

... Shipments edge down

(+5.7%) and motor vehicle (+4.5%) industries. The fabricated metals industry (-1.2%) posted the largest offsetting decline.

Inventories were up 1.0% to \$48.1 billion in November, the ninth increase of the year. November's decrease in shipments was outpaced by the rise in inventories, resulting in a higher inventory-to-shipments ratio of 1.30 (up from 1.29 in October). The aircraft and parts (+3.6%), motor vehicle (+9.2%) and food (+2.4%) industries contributed most to the rise in inventories. The largest

offsetting decrease was observed in the furniture and fixtures (-4.9%) industry.

Available on CANSIM: matrices 9550-9559, 9562-9579 and 9581-9595.

The November 1997 issue of Monthly Survey of Manufacturing (31-001-XPB, \$20/\$196) is now available. For further information, contact Craig Kuntz (613-951-7092) or Robert Traversy (613-951-9497), Manufacturing, Construction and Energy Division. (See also "Current trends" on page 7.)

Drop in retail sales

etail sales dropped 1.2% (–1.0% in constant dollars) to \$19.5 billion in November. The decline was broadly based across almost all retail sectors and all provinces. Compared with November 1996, however, sales were 4.4% higher.

Despite the broad retreat in November, big-ticket items continued to sell. Furniture stores (+0.7%) and motor and recreational vehicle dealers (+0.4%) posted advances. Both sectors

Retail and wholesale trade, November 1997^p Seasonally adjusted

	Retail s	ales	Wholesale sales		
	\$ millions %	change, previous month	\$ millions %	change, previous month	
Canada	19,526	- 1.2	24,778	- 0.8	
Newfoundland	300	0.1	188	- 1.8	
Prince Edward Island	83	- 3.1	41	- 15.3	
Nova Scotia	568	- 2.9	538	- 0.2	
New Brunswick	455	- 2.2	329	- 0.2	
Quebec	4,561	- 1.1	5,087	- 1.0	
Ontario	7,201	-0.7	11,133	- 0.6	
Manitoba	698	- 1.6	1,036	6.0	
Saskatchewan	653	- 2.2	828	- 7.8	
Alberta	2,205	- 2.0	2,642	- 0.8	
British Columbia	2,731	- 1.1	2,930	- 1.2	
Yukon	26	2.6	10	- 7.8	
Northwest Territories	44	- 0.8	15	- 15.4	

Preliminary figures.

have been offering favourable financing arrangements, and they have been strong performers in 1997. Despite advancing sales by vehicle dealers, declining sales by automotive parts, accessories and service stores (-7.6%) and gasoline service stations (-2.4%) resulted in an overall decrease in the automotive sector (-1.3%).

Department store sales rose 0.2% in November, offsetting October's decline. Compared with November 1996, department store sales were up 10.5%. Other general merchandise stores did not fare as well in November (-0.7%). Drugstores posted a 3.9% drop in sales, and clothing (-2.2%) and food stores (-0.5%) also recorded lower sales.

In Atlantic Canada, sales dropped by 2.1% in November. Sales in the Atlantic provinces hit a peak in July, but have been declining ever since. The weak performance by retailers in Quebec continued, with a decrease of 1.1%. Ontario posted a 0.7% decline in November, although sales there have been rising since the end of 1996.

The Prairie provinces recorded lower sales in November (-2.0%). In British Columbia, where retail sales have lagged behind most of the country, retailers posted a 1.1% drop in sales.

Initial estimates for December indicate: an increase in the number of new motor vehicles sold, a higher number of employees in retail trade, and more housing starts.

Available on CANSIM: matrices 2299, 2398-2417 and 2420.

The November 1997 issue of **Retail trade** (63-005-XPB, \$21/\$206) will be available shortly. For further information, contact Louise Généreux (613-951-3549; Internet: logener2@statcan.ca); for analytical information, contact Greg Peterson (613-951-3592; Internet: petegre@statcan.ca), Distributive Trades Division.

Wholesales sales decline

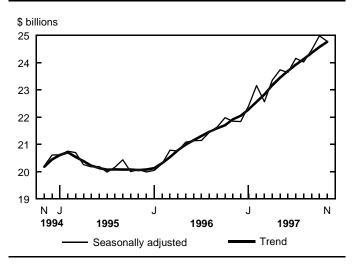
otal sales by wholesalers decreased 0.8% to \$24.8 billion in November. However, 1997 has been an excellent year for wholesalers, with sales for the first 11 months 12.5% higher compared with the same period in 1996.

Nine of the eleven trade groups recorded lower sales in November. Wholesalers of farm machinery posted the largest decline (-3.8%), followed by wholesalers of household goods (-2.8%) and apparel and dry goods (-2.7%). On the other hand, wholesale sales of computers and electronic equipment (+0.6%) were up for the third consecutive month. The motor vehicle and parts sector registered a 0.5% increase.

Wholesalers increased inventories by 1.1% in November, to reach \$35.6 billion. Except for farm machinery and equipment, inventories rose in all sectors. The combination of lower sales and

(continued on page 4)

Wholesale sales



... Wholesales sales decline

higher inventories pushed the inventories-to-sales ratio up from 1.41 in October to 1.43 in November.

Available on CANSIM: matrices 59, 61, 648 and 649.

The November 1997 issue of **Wholesale trade** (63-008-XPB, \$19/\$186) is now available. For further information, contact Paul Gratton (613-951-3541; Internet: gratpau@statcan.ca) or Ruth Neveu (613-951-7375), Distributive Trades Division.

Consumer prices up in December

n December 1997, consumers paid 0.7% more for the goods and services that make up the Consumer Price Index (CPI) basket than they did a year earlier. This was the lowest 12-month change in the CPI since the beginning of 1995. Higher prices for food purchased in stores and restaurants, tuition fees, local telephone services and natural gas contributed most to December's annual rise. Falling charges for mortgage interest, gasoline, fuel oil and computers partly offset these advances.

Between November and December, the CPI fell by 0.1%. This small decrease was the net result of price movements in a number of commodities. Consumers benefited from declining prices for clothing and footwear, gasoline, traveller accommodation, motor

Consumer Price Index, December 1997 % change, previous year, not seasonally adjusted

	All- items	Food	Energy	Housing	Transpor- tation
Canada	0.7	1.2	- 1.0	0.0	- 0.3
Newfoundland	1.0	0.6	4.4	1.5	0.9
Prince Edward Island	0.5	4.1	- 5.8	- 3.5	- 0.4
Nova Scotia	0.7	1.0	1.1	0.4	0.6
New Brunswick	1.0	0.9	4.2	2.3	- 0.7
Quebec	1.0	1.8	- 1.5	- 0.3	- 0.3
Ontario	0.7	0.2	- 2.1	0.2	- 0.6
Manitoba	0.7	0.0	- 1.8	1.3	- 0.5
Saskatchewan	0.1	0.9	- 2.9	1.3	- 1.9
Alberta	1.4	2.1	1.9	1.7	- 0.5
British Columbia	0.4	2.4	0.6	- 2.1	0.5
Whitehorse	1.7	4.3	5.0	1.4	1.9
Yellowknife	- 0.7	- 1.6	- 1.5	- 1.9	1.8

vehicle rentals and food, as well as lower mortgage interest costs. On the other hand, Canadians faced rising charges for air transportation, natural gas, new houses, and furniture.

With December sales, falling prices for clothing and footwear (-1.3%) applied downward pressure to the CPI. Gasoline prices fell a further 1.5% in December after declining in October and November. The decreases in traveller accommodation and vehicle rental charges were related to the introduction of winter rates. Food prices dipped slightly (-0.1%), as lettuce and poultry prices fell while tomato and beef prices advanced.

Air transportation led the group of commodities for which significant price increases were recorded. Airlines generally increase their fares to capitalize on the higher demand during the holidays; however, this December the increase was smaller than usual. Natural gas rates increased by at least 3.0% as distributors introduced winter rates and passed along the extra costs they have had to pay to natural gas producers.

Between December 1996 and December 1997, increases in the provincial CPIs ranged from a high of 1.4% for Alberta to lows of 0.1% in Saskatchewan and 0.4% in British Columbia. From a month-to-month perspective, Alberta was the only province to post an increase in December (+0.1%). The largest declines were recorded in Prince Edward Island (-0.6%), Newfoundland (-0.4%) and British Columbia (-0.3%).

Available on CANSIM: matrices 7440-7454 and 7463-7478.

The December 1997 issue of the **Consumer Price Index** (62-001-XPB; \$11/\$103) is now available. For further information, contact Sandra Shadlock (613-951-9606; fax: 613-951-2848; Internet: infounit@statcan.ca), Prices Division. (See also "Current trends" on page 7.)

Composite Index rises

he Composite Index rose by 0.3% in December. Although growth has slowed steadily since the beginning of 1997, 7 out of 10 components continued to expand. While business spending remained the major engine of growth, housing demand remained slow, and weak natural resource prices hurt financial markets.

Employment in business services ended 1997 on a firm note, which augurs well for continued robust business spending. In the third quarter, investment leapt ahead at its fastest pace in a decade. Manufacturers responded to their growing labour needs by

boosting payrolls. For the eighth consecutive month, the housing index continued to decrease, but sales of durable goods remained positive.

The stock market remained depressed by weak prices for natural resources, particularly gold. The stock market has accounted for half of the overall slowdown in the Composite Index since October.

Available on CANSIM: matrix 191.

For further information on the economy, see the January 1998 issue of Canadian economic observer (11-010-XPB, \$23/\$227), which is now available. For further information, contact Francine Roy (613-951-3627), Current Economic Analysis Group. (See also "Current trends" on page 7.)

More Americans visit Canada

n November, Americans made 2.1 million same-day car trips to Canada (+1.9%). This was the greatest number of same-day car trips in more than 16 years. Meanwhile, Canadians crossed the border on 2.8 million same-day car trips, down 1.6% from October.

Although the Canadian dollar has lost value compared with the U.S. dollar, it remains relatively strong against other foreign currencies. For the first time in three years, Canadians made more trips (349,000 or +3.2%) of one night or more to countries other than the United States than residents of these countries made to Canada (347,000 or -1.1%).

Travel between Cana	da and oth	er	countri	es, Noven	nbe	er 1997
	thousands	%	change,	thousands	%	change,

	modeande	previous	modeando	previous
	seasonally	adjusted	year-t	o-date
Canadian trips abroad Auto trips to the United Sta	ites			
Same-day	2,800	- 1.6	- ,	
One or more nights	744	0.7	8,746	- 3.7
Total trips, one or more night	hts			
United States ¹	1,252	0.8	,	- 1.0
Other countries	349	3.2	3,714	8.6
Travel to Canada	Dtataa			
Auto trips from the United S Same-day	2,145	1.9	23,443	6.3
One or more nights	712	0.0	7,966	0.3
One of more riights	7 12	0.0	7,500	0.4
Total trips, one or more night	hts			
United States ¹	1,125	0.3	12,624	2.9
Other countries ²	347	- 1.1	4,042	- 3.4

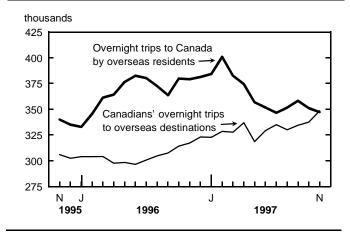
^{1.} Estimates for the United States include counts of cars and buses, and estimated numbers for planes, trains, boats and other methods.

Note to readers

Unless otherwise specified, data are seasonally adjusted (adjusted for variations that repeat annually and for variability caused by the different volumes of travellers associated with different days of the week).

Month-to-month comparisons use seasonally adjusted data. Year-over-year comparisons use unadjusted data (the actual traffic counts).

Trips overseas by Canadians, seasonally adjusted



Canadians spent at least one night in the United States on 1.3 million occasions (+0.8%), while Americans took 1.1 million trips of one night or more to Canada (+0.3%).

Available on CANSIM: matrices 2661–2697, 5780–6046 and 8200–8328.

The November 1997 issue of International travel, advance information (66-001-PPB, \$8/\$73) is now available. For further information, contact Luc Dubois (613-951-1674; fax: 613-951-2909; Internet: duboluc@statcan.ca), Culture, Tourism and the Centre for Education Statistics.

Figures for other countries exclude same-day entries by land only, via the United States.

New from Statistics Canada

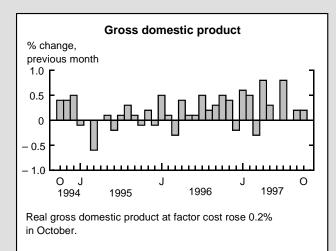
Travel-log Winter 1998

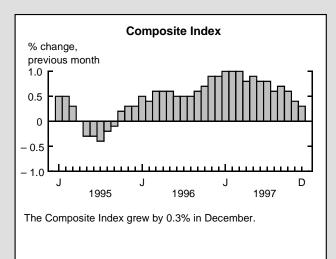
The Winter 1998 issue of *Travel-log*, Statistics Canada's quarterly tourism newsletter, features the article "Tourism in census metropolitan areas: New possibility for the Tourism Statistics Program." For the first time, using 1996 Canadian Travel Survey (CST) data, it is possible to paint a complete picture (at the regional level) of places visited between origin and final destination. Information on all places visited by foreign travellers in Canada was already gathered by the International Travel Survey (ITS). Although the economic impact of the tourism sector has often been examined at the national and provincial levels, the impact on regional communities has been overlooked. However, by combining data from the CTS and the ITS it is now possible to examine the direct economic contribution of Canadian and foreign visitors to select census metropolitan areas.

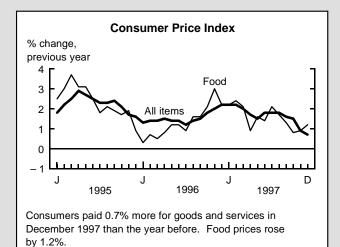
Each quarter, *Travel-log* features the latest travel indicators and the international travel account. It also examines the trends of the Travel Price Index. Travel-log also features a summary page on tourism indicators for tourism demand in Canada and employment generated by tourism.

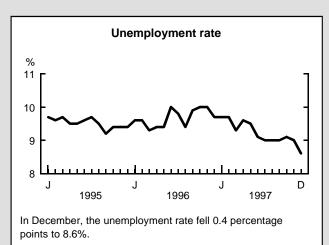
The Winter 1998 issue of **Travel-log**, Vol. 17, no. 1 (87-003-XPB, \$13/\$42), is now available. For further information, contact Monique Beyrouti (613-951-1673; fax: 613-951-2909; Internet: beyrmon@statcan.ca), Culture, Tourism and the Centre for Education Statistics.

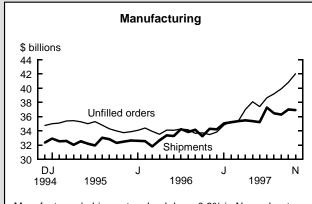
Current trends













Manufacturers' shipments edged down 0.3% in November to \$36.9 billion. The level of unfilled orders increased 2.6% to \$42.0 billion.

In November, the value of merchandise exports jumped 1.5% from October to \$25.6 billion. Imports declined 0.9% to \$24.5 billion.

Note: All series are seasonally adjusted except the Consumer Price Index.

Lat	est monthly	statistics		
	Period	Level	Change, previous period	Change, previous year
GENERAL				-
Gross domestic product (\$ billion, 1992) Composite Index (1981=100) Operating profits of enterprises (\$ billion)	October December* Q3 1997	700.7 202.2 27.7	0.2% 0.3% 2.7%	4.2% 9.2% 11.9%
Capacity utilization (%)	Q3 1997	86.2	1.2†	2.9†
DOMESTIC DEMAND				
Retail trade (\$ billion) New motor vehicle sales (thousand of units)	November* November	19.5 123.4	- 1.2% 3.4%	4.4% 15.2%
LABOUR				
Employment (millions)	December December	14.1 8.6	0.4%	2.6%
Unemployment rate (%) Participation rate (%)	December December	8.6 64.8	− 0.4† − 0.1†	-1.1† 0.0†
Labour income (\$ billion)	October	37.48	0.2%	3.8%
Average weekly earnings (\$)	October	595.81	- 0.2%	0.3%
INTERNATIONAL TRADE				
Merchandise exports (\$ billion)	November*	25.6	1.5%	7.4%
Merchandise imports (\$ billion)	November*	24.5	- 0.9%	15.4%
Merchandise trade balance (all figures in \$ billion)	November*	1.0	6.0	- 1.5
MANUFACTURING				
Shipments (\$ billion)	November*	36.9	-0.3%	5.7%
New orders (\$ billion)	November*	38.0	- 0.1%	9.89
Unfilled orders (\$ billion)	November*	42.0	2.6%	23.4%
Inventory/shipments ratio	November*	1.30	0.01	- 0.02
PRICES				
Consumer Price Index (1986=100)	December*	137.8	-0.1%	0.79
Industrial Product Price Index (1992=100)	November	120.1	0.6%	1.49
Raw Materials Price Index (1992=100)	November	123.4	-1.6%	- 5.1%
New Housing Price Index (1986=100)	November	133.4	0.4%	1.2

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

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^{*} new this week

[†] percentage point

Publications released from January 23 to 29, 1998

			Price: Is	ssue/Subscription
Division/Title of publication	Period	Catalogue number	Canada (C\$)	Outside Canada (US\$)
CANADIAN CENTRE FOR JUSTICE STATISTICS Jusistat: Motor vehicle theft in Canada	1996	85-002-XPE	10/93	10/93
CULTURE, TOURISM AND THE CENTRE				
FOR EDUCATION STATISTICS Travel-log	Winter 1998	87-003-XPB	13/42	13/42
CURRENT ECONOMIC ANALYSIS				
Canadian economic observer Canadian economic observer, Historical	January 1998	11-010-XPB	23/227	23/227
statistical supplement	1996/97	11-210-XPB	28	28
DISTRIBUTIVE TRADES				
Wholesale trade	November 1997	63-008-XPB	19/186	19/186
INDUSTRIAL ORGANIZATION AND FINANCE				
Quarterly financial statistics for enterprises	Q3 1997	61-008-XPB	35/114	35/114
INTERNATIONAL TRADE				
Canadian international merchandise trade	November 1997	65-001-XPB	19/188	19/188
Exports by commodity (microfiche version)	October 1997	65-004-XMB	37/361	37/361
Exports by commodity (paper version)	October 1997	65-004-XPB	78/773	78/773
MANUFACTURING, CONSTRUCTION AND ENER	GY			
Construction type plywood	November 1997	35-001-XPB	7/62	7/62
Energy statistics handbook (electronic version)	January 1998	57-601-XDE	284	284
Energy statistics handbook (paper version)	January 1998	57-601-UPB	387	387
Primary iron and steel	November 1997	41-001-XPB	7/62	7/62
Pulpwood and wood residue statistics	November 1997	25-001-XPB	8/73	8/73
Mineral wool including fibrous glass insulation	December 1997	44-004-XPB	7/62	7/62
Monthly Survey of Manufacturing	November 1997	31-001-XPB	20/196	20/196
Sawmills and planing mills	November 1997	35-003-XPB	12/114	12/114
SCIENCE AND TECHNOLOGY REDESIGN PROJE	ECT			
Telephone statistics	November 1997	56-002-XPB	10/93	10/93

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Key release calendar: February 1998							
Monday	Monday Tuesday		Thursday	Friday			
Business Conditions Survey, Canadian manufacturing industries, January 1998	Building permits, December 1997 Field crop reporting series, December 31 grain stocks	Beyond generational accounting Family food expenditure in Canada, 1996	Help-wanted Index, January 1998 Television and radio audiences, Fall 1996	Labour Force Survey, January 1998			
9	10	New motor vehicle sales, December 1997 New Housing Price Index, December 1997	Family expenditure in Canada, 1996	13			
Monthly Survey of Manufacturing, December 1997 Travel between Canada and other countries, December 1997	Ethnic origin, visible minorities, 1996 Census	Wholesale trade, December 1997 Adult correctional services in Canada, 1996	Canadian international merchandise trade, December 1997 Quarterly financial statistics for enterprises, Q4 1997	Retail trade, December 1997 Livestock statistics, January 1998			
Canada's international transactions in securities, December 1997 Farm cash receipts, Q4 1997	24 Composite Index, January 1998 Employment Insurance, December 1997 Changing nature of fraud in Canada, 1996	Characteristics of international travellers, Q3 1997 Private and public investment in Canada, 1996, 1997 and 1998 (intentions)	Industrial Product Price Index, January 1998 Raw Materials Price Index, January 1998	27 Consumer Price Index, January 1998 International travel account, Q4 1997 Employment, earnings and hours, December 1997			

Note: Release dates for Canadian international merchandise trade, the Consumer Price Index and the Labour Force Survey are fixed; dates for other data series may change.